



Northumberland County Premier-Ranked Tourist Destination Project

Research Report

Summary of
Project Findings and Recommendations

October 2009

Working together for our future success!



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This Project was funded in partnership with the Ontario Ministry of Training, Colleges & Universities, the Ontario Ministry of Tourism and the Government of Canada.

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Canada 

Project facilitated by:



Northumberland Economic Development and Tourism
555 Courthouse Road, Cobourg, Ontario, K9A 5J6
(905) 372-3329 or 1-800-354-7050

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PRTD Research Team:

Teresa Grant
Linda Johnston
Paul MacDonald
Amy Sallows

Project Supervisor:

Eileen Lum, Manager, Northumberland Tourism

Ontario Ministry of Tourism:

Beverley Quirt, Regional Tourism Industry Advisor

Project Facilitator:

Richard Innes, Brain Trust Marketing & Communications

Northumberland County PRTD Community Champions:

Nancy Allanson, Chamber of Commerce & Tourism
Gail Anderson, Tower Manor Lodge
Cori Arthur, Northumberland Tourism
Donna Bennett, Westben Arts Festival Theatre
David Bree, Presqu'ile Provincial Park
Ken Burgin, Architectural Conservancy of Ontario Port Hope
Paul & Ann Burnham, Burnham Family Farm Market
Erica Calhoun, Brighton Chamber/Apple Route Tourism
Diane Camelford, Northumberland Mall
Donna Cane, Victoria Inn
Olga Chernuck, Golden Beach Resort
Dave Cutler, Township of Brighton
Stephen Della Casa, The Woodlawn Inn
Peter Delanty, Mayor, Town of Cobourg
Camille Edwards, Deputy Mayor, Trent Hills
Vaughn Finch, Municipality of Brighton
Burke Friedrichkeit, Burken B & B
Wendy Giroux, Port Hope Chamber of Commerce
Rebecca Goddard-Sarria, Cramahe Tourism
Amy Griffiths, Ganaraska Region Conservation Authority
Dave Henderson, Hill and Dale Manor
Isobel Hie, The Old Burrison Homestead
Kelly Jessup, Downtown Cobourg DBIA
Brian and Laura Johnson, Plank Road Cottages
George Lucas, Brighton Chamber of Commerce
Jennifer Madamba, Pieter's Apple Yard
Vicki Macmillan, Empire Cheese & Butter Co-op
Tom Mates, Presqu'ile Provincial Park

Trissia McAllister, Northumberland County Economic Development
Debra McCarthy, Downtown Cobourg DBIA
David Navia, Ste. Anne's Spa
Faith and Dan Osmond, Maple Ridge Farm
Andrea Patterson, Port Hope Tourism
Bill Rudland, Harbourview Motel
Tony Scriver, Golden Beach Resort
Lara Scott, Events Coordinator Cobourg
Reese Simpson, Economic Development-Alderville First Nations
Alexis Smith, Northumberland Mall
Rhonda Lee Stephenson-Read, Aye Lighthouse Bed & Breakfast
Rose Todd, Hoselton Sculptures
Erin Wakely, Cobourg Tourism
Kevin Ward, Northumberland Central Chamber
Roger Warren, Darolex Home Décor
Jane Weeks, Small Bones
Louise Weldon, Capitol Theatre
Brad Willcocks, Best Western Inn and Convention Centre

EXECUTIVE SUMMARY

Northumberland PRTD Background

Northumberland County is at a critical point with respect to destination development. Tourism businesses are looking for ways to encourage business growth during these changing times.

Continued growth of the industry is predicated by opportunities for partnering and packaging. In order to build on these opportunities, an assessment must take place to identify exactly what the product inventory is, which partners are indeed market-ready, identify the current gaps and challenges for the sector, and set the blueprint or strategy to build capacity and determine direction. An assessment will enhance current efforts in attracting investors to Northumberland County.

With an annual visitation rate of 1.3 million people per year, and with the key GTA market being within a one hour drive, there is a significant growth opportunity for tourism in Northumberland County with over 100 million potential tourists within a days' drive.

The assessment process used to determine destination development is the Premier-ranked Tourist Destination (PRTD) framework. Developed by the Ontario Ministry of Tourism, it is designed to evaluate a tourism destination through its product offerings, performance and futurity as well as identify weaknesses and gaps which should be addressed, and identify strengths and opportunities that might be used to create a sustainable competitive advantage.

Objective

The objective is to provide well-informed strategic direction to develop a tourism destination plan. The project evaluated local accommodation, attractions, business improvement areas, festivals & events, as well as the food and beverage industry. Included on the project's survey were questions on accessibility, visitation patterns and future developments.

To stay competitive in the tourism marketplace, a tourism destination must have attributes well above the average quality, along with dimensions that capture quality of the tourist experience, destination attractiveness, and market success.

Northumberland County is starting from a position of strength, as it has:

- An attractive collection of four season experiences
- \$111.7 Million in visitor spending annually
- Critical acclaim on many fronts
- 1.33 million person visits in 2007
- Over 7.3 million people within 3 hours drive
- Several organizations involved in tourism

The Project Process

The Premier-ranked Tourist Destination Framework is designed to guide a research team through a three stage process of evaluation, interpretation and planning by examining in detail, three dimensions of the destination.

1. **The Product Dimension** determines if Northumberland County provides a high quality tourist experience, enabled through the following offerings:
 - *Demand Generators (Distinctive Core Attractors);*
 - *Quality and Critical Mass;*
 - *Satisfaction and Value;*
 - *Accessibility; and,*
 - *An Accommodations Base.*
2. **The Performance Dimension** examines and validates Northumberland County's success in providing a quality tourist experience by examining:
 - *Visitation*
 - *Occupancy and Yield; and,*
 - *Critical Acclaim;*
3. **The Futurity Dimension** evaluates Northumberland County's ability to thrive from tourism and its sustainability into the future through:
 - *Destination Marketing;*
 - *Product Renewal; and*
 - *Managing within Carrying Capacities.*

"Premier-ranked" is defined as: "A place more attractive than the rest, a place the tourist should consider first when making travel plans." Premier-ranked is not a formal tourism designation but rather is an internal tourism goal for a destination to work towards as it relates to becoming "better than the rest".

Survey Results

474 of the 722 tourism related businesses or organizations sent surveys responded by completing and returning their surveys, representing a respectable response rate of 66%. All recipients received a core survey, and at least one of 13 additional sector surveys.

Secondary research was gathered and used to help shape the current picture of the destination. The survey data and secondary research was accumulated, entered, clarified, analyzed and evaluated using the PRTD guidelines and the Tourism Resource Opportunity Matrix. A comprehensive "PRTD Research Report" was completed by the audit team; it contains the detail research that supports recommendations in this report.

Core Attractors

Core attractors are the reason visitors travel to a destination, and should meet at least two of the following criteria: Attract a significant number of visitors annually; Have a physical or historical link to the destination; be a destination landmark.

Northumberland County's Core Attractors

- Picturesque Towns, Rural Landscapes and Cultural Cluster
- Outdoor Recreation Cluster
- Angling and Sport Fishing

The Picturesque Towns, Rural Landscapes and Cultural Cluster Is best appreciated by touring through the county. The cluster includes visual and performing arts, heritage, shopping and dining experiences. Some of the many opportunities available in Northumberland include:

Touring opportunities

- ✓ 8 Driving Tours/Routes
- ✓ Prime Motorcycle Touring Routes
- ✓ Scenic Lookouts/Sightseeing Locations
- ✓ Driving Tour Publications

Visual & Performing Arts

- ✓ 6 Annual Music Festivals
- ✓ 6 Indoor Live Theatre/Music venues
- ✓ 16+ Live Theatre/Music opportunities
- ✓ 30+ Artists Studios/5 Annual Art Events
- ✓ 2 Annual Studio Tours/12 Art Galleries

Heritage Sites

- ✓ 10 Museums/Restored Historic Homes
- ✓ 3 National Historic Sites
- ✓ 382 Designated Heritage Properties/Sites
- ✓ 2 Designated Heritage Conservation Districts
- ✓ 1 Heritage Fair
- ✓ 5 Public Gardens

Festivals & Events

- ✓ 87 Annual Festivals/Events collectively attended by over 276,758 people
- ✓ 36 Annual Non-Music Festivals
- ✓ 1 Annual Aboriginal Festival
- ✓ 4 Annual Agricultural Fairs/ /1 Living Green Fair

Shopping & Dining

- ✓ 4 Antique Markets/40+ Antique Stores
- ✓ 12 Local and Native Craft Stores
- ✓ 50 Specialty Shops/6 Factory Outlets
- ✓ 5 Farmer's Markets
- ✓ 5 Fine Dining restaurants/162 Mid-priced restaurants and 65 Fast food restaurants

The Outdoor Recreation Cluster has played a large part in the make-up of Northumberland County tourism offering for many years. This year-round cluster of diverse activities and outdoor recreation experiences provides visitors with a variety of things to do year-round, including:

Land Based Outdoor Recreation opportunities

- ✓ 5 Road Bike Routes (totaling 286 km's) and 17 Mountain Bike Trails
- ✓ 15 Conservation Areas/5 Conservation Reserves
- ✓ 2 Provincial Parks with 10 Campgrounds and 457 campsites
- ✓ 1 Provincial Wildlife Area and 2 managed forests.
- ✓ 26 Day Hiking Opportunities with over 37 Trails
- ✓ 30 Bird Watching Sites
- ✓ 8 Equestrian Trails and 3 Equestrian Facilities
- ✓ 11 Golf Courses
- ✓ 21 Cross Country & 19 Snowshoeing Opportunities with over 39 Trails
- ✓ 3 Snowmobile Clubs, 10 Snowmobile and 3 ATV Opportunities

Water Based Outdoor Recreational opportunities

- ✓ 15 Public Beaches and Swimming Locations
- ✓ 5 Public Swimming Pools
- ✓ 2 Scuba Diving Sites
- ✓ 18 Public Boat Launches
- ✓ 23 Marinas with 1401 seasonal slips/236 transient slips, and 3 Yacht clubs
- ✓ 1 sailing school and 1 wakeboarding school

Angling and Sport Fishing - Because it is surrounded by major waterways, Northumberland County is one of the most diverse fishing hot spots in Southern Ontario and has numerous angling opportunities all year-round including:

- ✓ 24 Sport fishing locations including Lake Ontario, Rice Lake, Upper and Lower Ganaraska River, the Trent River, and numerous smaller creeks and streams.
- ✓ 3 Ice fishing locations: Presqu'ile Bay, Trent River (Percy Boom/Campbellford) and Linwood Acres Trout Farm.
- ✓ 18 Public Boat Launches
- ✓ 17 Species of freshwater game fish
- ✓ 23 Marinas with 1401 seasonal slips and 236 transient slips
- ✓ 1 Public Fish Hatchery and 1 Private Trout Farm
- ✓ 6 Fishing Charters/Outfitters/Guide Services
- ✓ Average of 30 -40 tournaments per year

Recommendations

County Council approved the Premier-Ranked Tourist Destination Project recommendations on September 16, 2009. **(*Indicates work already begun, or in progress)**

Implement a Tourism Development Action Plan

Develop a **3 Year Tourism Development Action Plan** in order to generate increased visitation, tourism revenues and jobs through 2012.

- **Establish a Steering Committee** comprised of tourism industry stakeholders to help drive the process and implement actionable items.
- Identify a series of realistic tourism objectives related to growth in visitation, tourism revenues, economic impact and jobs.
- **Identify roles of Destination Marketing Organizations** (DMO's), Chambers of Commerce, Business Improvement Associations (BIA's), and Economic Development Depts.
- Northumberland County Tourism should continue to lead destination management by initiating dialogue between all organizations that have tourism as part of their mandate in order to **establish a more collaborative approach** to destination management.
- Creation of a **Rice Lake Tourism Renewal Strategy*** in order to enhance the outdoor recreation, angling and sport fishing offering which represents one of the key tourism assets of the County.
- Incorporate an **events strategy** into the Destination Development Action Plan. Maximize the festivals & events calendar through collaboration and a strategic approach to timing of events.

Near Term Recommendations*

- Where applicable, institute **technological initiatives** to support all three core attractors.
- Establish Northumberland's Culture of Hospitality Excellence by implementing ongoing **customer service training**.
- Introduce an annual **visitor survey** to track visitor experiences and gauge satisfaction (e.g. value for money, friendliness etc.).
- Capitalize on the **Visiting Friends and Relatives (VFR)** market segment by creating a programme that encourages Northumberland residents to become tourism ambassadors.
- Increase visitation and economic impact by developing **packages** that include a variety of offerings designed to extend length of visitors' stay.

Mid Term Recommendations

- Develop a **strategy to grow financial/human resources** to better serve, develop and market the destination.
- Increase the **awareness of the importance of tourism** among key influencers and the general public.
- Introduce annual **Northumberland Service Awards** to recognize and reward good service.
- Establish a **Sports Tourism Task Team** to fully explore opportunities available from this growing market segment.

Long Term Recommendations

- Develop strategies to leverage and support the long term development and increase the economic impact of underdeveloped or underperforming assets (e.g. Trent-Severn Waterway, culinary tourism, bike tourism, etc...)
- Develop an **investment attraction strategy for the accommodation sector**.
- Establish a **Northumberland County brand***, one that differentiates the destination.
- Explore the opportunities associated with the Meeting & Conference market by establishing a **Meetings & Conventions Task Team (M&C)**.

Next Steps

Northumberland Tourism, in conjunction with the Northumberland Tourism Advisory Committee and industry participants, will form a steering committee whose primary mandate will be to develop a 3 Year Tourism Development Action Plan and implementation strategy. This group will oversee and facilitate implementation of the recommendations arising from the Premier-Ranked Tourist Destination Project. Specific timelines will be established once the committee meets. It is expected that the Tourism Advisory Committee will provide regular status reports to Northumberland's tourism industry and County Council.

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. The successful implementation of the recommendations is based on a thorough understanding, appreciation, engagement and endorsement from both the private and public sector partners.

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 Tourist Destination indicates that “here is a place more attractive than the rest, a place the potential tourist visitor should consider first in making travel plans.” To be clear, Premier-ranked is not a formal tourism designation but rather is 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 Premier-ranked Tourist Destinations 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, and Durham. The cities of Mississauga, Hamilton, Cornwall, Brockville, Kingston, Gananoque and Toronto have also completed their PRTD assessments along with many others. Most have used the results of their studies in the development of comprehensive tourism product development plans.

The Northumberland PRTD project was an initiative endorsed by Northumberland County’s Tourism Advisory Committee and facilitated by the Northumberland County Economic Development and Tourism, the Ontario Ministry of Tourism, 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, 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 Northumberland County, and asked respondents to describe their operations, services offered, customer base and tourism awareness among others.

The survey was mailed to establishments from the 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 January 2009 to assist with the introduction of the program to industry, to provide analysis of the audit results and preparation of the final report. A Community Champions Committee was formed by industry leaders and stakeholders in the tourism business within Northumberland County.

The consultant worked with the Northumberland Tourism 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 also identify potential opportunities and partnerships within the tourism industry. Based on feedback, comments, and validation from the Community Champion Committee and the industry at the following sessions, recommendations for inclusion in the final report were developed.

PROJECT MILESTONES

- May 29, 2008 – Initial information session held in Cobourg, Ontario
- September 2008 - Northumberland County Tourism receives approval to undertake the Premier-ranked Tourist Destinations Framework initiative
- October 2008 - MTCU and The Ministry of Tourism agree to fund the PRTD Initiative, hiring process began
- November 2008 - Project staff hired, teams worked to build database of tourism stakeholders and prepare survey (a year long project began)
- December 2008 - Hired Consultant – BRAIN TRUST Marketing & Communications to analyze findings, facilitate validation process with the industry, make observations, identify recommendations and prepare the final report
- December 12, 2008 Consultant meets with senior staff and research team to identify project parameters and agree on work plan and deliverables
- January 15, 2009 Initial meeting with Community Champions
- February 2, 2009 Industry Surveys mailed out
- February 3 to March 27 2009 – Completed Surveys returned, data entered into database
- April 30, 2009 - Final Survey Collection complete, Resource Audit and Opportunity Matrix data collection complete
- May 2009 Consultant analyses workbook measures, receive input from Supervisor, research team, senior tourism staff
- May 5, 2009 - Community Champions Industry consultation meeting to provide project status up-date and to review initial findings and garner feedback and validation of work done to date.
- June 19, 2009 - Community Champions meeting. Consultant presents draft recommendations to industry for validation and endorsement, recommendations endorsed.
- August 25, 2009 – Community Champions Steering Committee reviews “overview” draft of PRTD Report before being presented to Council for approval
- September 16, 2009 - Consultant to present Final Recommendation Report to County Council
- October 5, 2009 - Industry Meeting and presentation of recommendation report

- November-December, 2009 – Formation of Steering Committee (i.e. members of Community Champions + Tourism Advisory Committee) to develop a 3 year Tourism Development Strategy based on PRTD recommendations
- Early 2010 - Steering Committee develops implementation plan
- Autumn 2010 - Implementation of 3 year Tourism Development Plan begins

It can be safely said that, as a result of this consultative process, the tourism industry in Northumberland County has endorsed the recommendations contained in this report. It is the culmination of many hours of diligent work, dialogue and discussion.

This report contains key recommendations that if implemented, will have a positive impact on all of those who live, work and visit Northumberland County.

PURPOSE FOR PRTD FRAMEWORK IN NORTHUMBERLAND COUNTY

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

By undertaking the PRTD framework project the leaders in Northumberland County'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 destinations 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 our future priorities.
- Educate and inform ourselves regarding the range of attractions in our region, develop a pride and knowledge about our 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 our region, to increase accommodation availability, variety and to expand and improve attractions.
- Attract greater government funding, acknowledgement and support for increased tourism promotion effort and brand-awareness.
- Improve communication of our Northumberland County's brand, an important part of this effort being to better define where and what is Northumberland County.

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

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

NORTHUMBERLAND COUNTY COMMUNITY PROFILE

Northumberland County is where close to 81,000 people have chosen to live, work, play, and grow. From the clean and clear waters of Lake Ontario and Rice Lake, to the serene beauty of Ferris and Presqu'île provincial parks, Northumberland County offers an aesthetically brilliant landscape complimented by its vibrant communities. Northumberland County is comprised of the seven municipalities: Town of Port Hope, Hamilton Township, Alnwick/Haldimand Township, Cramahe Township, the Municipality of Brighton, the Municipality of Trent Hills and the Town of Cobourg.

Northumberland County (2006 population 80,963) is situated on the north shore of Lake Ontario, in east-central Ontario, Canada. It is located east of Durham Region, west of Hastings County, southeast of City of Kawartha Lakes and south of Peterborough County. The county seat is Cobourg.

Total Population:	80,963 (2006)																		
Population Growth Rate:	Total population increased 4.5% between 2001 and 2006																		
Languages:	English - 93%, French - 1.3%, Other - 5.7% (Mother tongue – the first language learned and still understood).																		
Age Structure:	84 % of the population is aged 15 and over <table style="margin-left: 40px;"> <tr> <td>0-14</td> <td>12,970</td> <td>16%</td> </tr> <tr> <td>15-24</td> <td>9,725</td> <td>12%</td> </tr> <tr> <td>25-39</td> <td>11,440</td> <td>14%</td> </tr> <tr> <td>40-64</td> <td>30,980</td> <td>38%</td> </tr> <tr> <td>65 and over</td> <td>15,850</td> <td>20%</td> </tr> <tr> <td></td> <td>80,963</td> <td>100%</td> </tr> </table>	0-14	12,970	16%	15-24	9,725	12%	25-39	11,440	14%	40-64	30,980	38%	65 and over	15,850	20%		80,963	100%
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40-64	30,980	38%																	
65 and over	15,850	20%																	
	80,963	100%																	
Median Age of the population:	44.8 (Ontario = 39.0)																		
Land Area (Square Kilometres):	1903 Km ² (735 miles ²)																		
Population density per square kilometer:	42.5																		
Income:	Median income in 2005 - All private households: \$55,802																		
Dwellings:	Total Private Dwellings: 31,550																		

Statistics Canada Community Profiles 2006.

PREMIER-RANKED TOURIST DESTINATION 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 emphasis is on enabling any tourist destination (of any scale) 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, or moving to 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:

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

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

- 1) 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 understand their plans for future development.
- 2) Competition of the Tourism Resource/Opportunity Matrix. The opportunity Matrix looks at 123 opportunities in the areas of:
 - 1) Water-based Recreation Opportunities;
 - 2) Land-based Recreation opportunities;
 - 3) Land and Water-based opportunities;
 - 4) Natural Resource Opportunities;
 - 5) Cultural and Heritage Resource opportunities;
 - 6) Built Recreation/Commercial Infrastructure.
 - 7) A Travel Trade Resources Checklist.
 - 8) A Transportation Resources Checklist.

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

**THE
PRODUCT
DIMENSION:**

A Premier-ranked Tourist Destination provides a high quality tourist experience, enabled through the destination's offerings of:

- A. Distinctive Core Attractions;
- B. Quality and Critical Mass;
- C. Satisfaction and Value;
- D. Accessibility; and,
- E. An Accommodations Base.

**THE
PERFORMANCE
DIMENSION:**

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

- F. Visitation
- G. Occupancy and Yield; and,
- H. Critical Acclaim;

**THE
FUTURITY
DIMENSION:**

and sustained by:

- I. Destination Marketing;
- J. Product Renewal; and,
- K. Managing within Carrying Capacities.

Each of the elements "A" to "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 destination performance summary*
- Step 6 Determine whether your destination is among the Premier-ranked*

PLANNING

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

Refer to Appendix E for Glossary of Terms and Basic Tourism Concepts

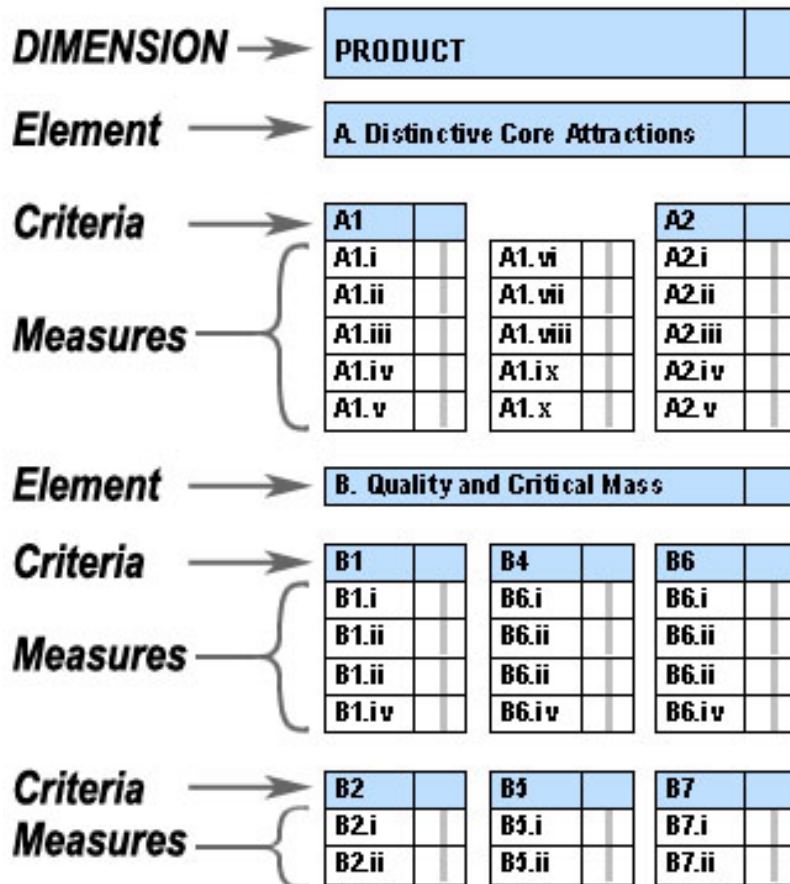
EVALUATION

Northumberland County’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”, “almost true” or “not true yet” for the destination. It is answered with a “Yes”, “Almost” (“A”) or “No”.

The second part asks for the facts that substantiate the answer to the first. The responses to the questions are recorded with a check mark in the appropriate box (Yes, “A” or No) on the work page, and transferred to the Performance Summary Form provided in the PRTD framework.

The Performance Summary Form (Appendix) 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 to K. Each element has a series of consecutively numbered Criteria as in A1, A2 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, A1 and A2. The first Element of "A" has ten measures, the second has four. Element B - Quality and Critical Mass has seven criteria, each of which has two to four measures.



Completing The Resource Audit

Completion of the Resource Audit was the first step in the destination assessment process.

The Audit relied on the following supporting tools:

- 1) Tourism Industry Survey;
- 2) YLM Northumberland County's On-line Business-Directory
- 3) A Tourism Resource/Opportunity Matrix;
- 4) a Transportation Resources Checklist; and,
- 5) a Travel Trade Resources Checklist

Tourism Industry Survey

Using the YLM¹ Northumberland County On-line Business Directory in early February, 2009 as a resource for identifying target survey recipients, industry surveys were initially sent out to 934 businesses and organizations involved in providing tourism products, services or experiences to visitors. By eliminating those survey recipients whose businesses were closed, moved or deemed not to be tourism related, the true survey quantity was determined to be 722. All recipients received a core survey, and at least one of 13 additional sector surveys, depending on the nature of the business or organization. The sector surveys included more specific questions aimed at specific sectors, as follows:

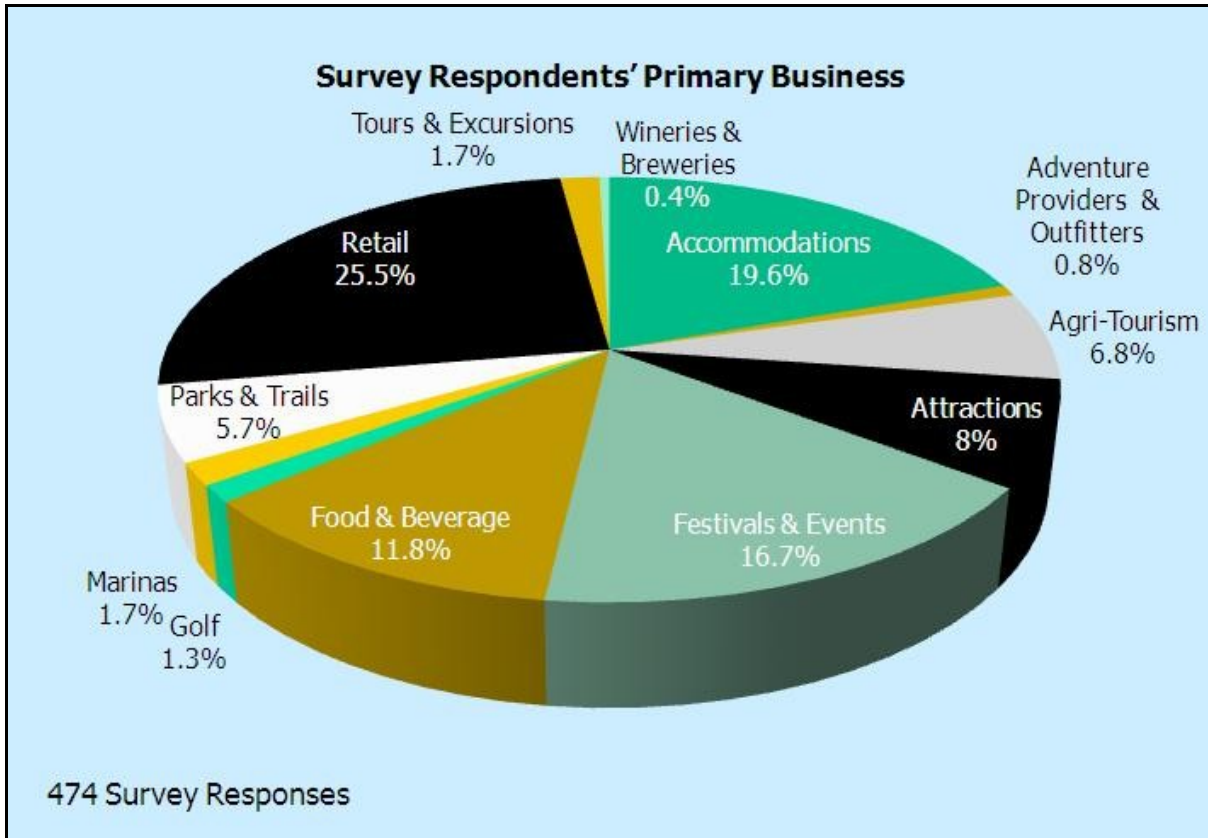
- Accommodations
- Adventure Providers/Outfitters
- Agri-Tourism
- Attractions (Cultural, Historic, Natural, Sports etc.)
- Festivals and Events
- Food and Beverage
- Golf
- Marinas
- Parks and Trails
- Retail
- Skiing and Snowboarding
- Tours and Excursions
- Wineries and Breweries

474 of the 722 businesses or organizations responded by completing their surveys, representing a respectable response rate of 66%. The following chart indicates the response rate by industry sector. It must be noted that in some instances, businesses received and completed more than one industry sector survey depending on the nature of their operation. A resort with a gift shop, restaurant, and marina would have received 4 sector surveys (accommodations, retail, food & beverage, and marina) for instance.

¹ YLM – trademark – Your Local Marketplace.

Tourism Industry Survey Response

	Total Core Surveys	Accommodations	Adventure Providers/Outfitters	Agri-Tourism	Attractions	Festivals & Events	Food & Beverage	Golf	Marinas	Parks & Trails	Retail	Skiing	Tours & Excursions	Wineries & Breweries
Core Survey Distributed	722	121	63	81	170	127	152	11	26	30	312	5	27	2
Surveys Received	474	92	14	39	76	86	70	6	16	27	138	1	16	2
Response Rate	66%	76%	22%	48%	45%	68%	46%	55%	62%	90%	44%	20%	59%	100%



Source: Northumberland County PRTD Survey, 2009

The Tourism Resource/Opportunity Matrix

The Tourism Resources/Opportunity matrix was 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; and,
- as a summary reporting form.

The Transportation Resources Checklist

The Transportation Checklist was completed by the PRTD project team using information gathered from local sources. The checklist can be found in appendix A.

The Travel Trade Resources Checklist

The Travel Trade Resource Checklist was completed by the project team. The Checklist can be found in appendix B.

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:

- what it is about Northumberland County that makes it stand out as distinct in the marketplace;
- how Northumberland County's attractions are distinguished; and
- how Northumberland County's offering is relevant to market wants.

A1.

The destination offers distinctive core attractors which are linked to its physical setting 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 complementary tourism attractions/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.			✓

Northumberland County's core attractors are (no particular order of importance):

1. Picturesque Towns, Rural Landscapes and Cultural Cluster
2. Outdoor Recreation Cluster
3. Angling & Sport Fishing

Picturesque Towns, Rural Landscapes and Cultural Cluster

Northumberland County has scenic rolling hills, picturesque communities, waterfront towns and cultural and historical attractions with a variety of places to eat and sleep. Northumberland has a spacious and unhurried feel with wide open undeveloped spaces and unspoiled natural assets such as forests, lakes, streams, beaches and farmland.

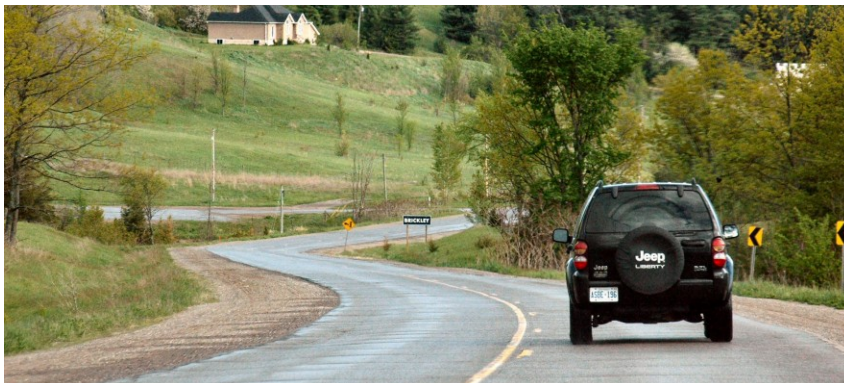
This cluster of experiences is best appreciated with visits to picturesque waterfront towns and drives through the rural landscapes, scenic rolling countryside and villages scattered throughout the county. The experience is enhanced with a diversity of cultural offerings; visual and performing arts offered at festivals and events, theatres, galleries and studios. Charming streetscapes, historic buildings, entertainment, distinctive shops, and dining opportunities provide a year-round experience in the communities of Port Hope, Cobourg, Brighton and smaller towns and villages like Warkworth, Hastings and Campbellford in their own right also offer character and diversity.

A number of driving tours are available and enjoyed by both two wheeled and four wheeled motorists. The Apple Route is named after the variety of apple orchards that grace the countryside in the southern portions of the county. This scenic and relaxing drive along County Road 2 takes you through many small towns and hamlets of historic significance. Each driving tour has its own character or theme, offering a variety of experiences for visitors.

Touring opportunities:

- 8 Driving Tours/Routes
- Prime Motorcycle Touring Routes
- Scenic Lookouts/Sightseeing Locations
- 1 Driving Tour Publication

Northumberland County is rich in both visual and performing arts, and cultural opportunities are numerous and varied. Northumberland County is alive with an active arts community offering an array of entertainment opportunities in one-of-a-kind theatre settings, renowned and professional artists including potters, painters, sculptors, authors, photographers, landscape artists, playwrights, directors, dancers, and actors, are scattered throughout the hills.



Arts & Culture - Visual Arts Opportunities

Northumberland has a vibrant visual arts community and is home to many of Canada’s professional artists and artisans, directors, performers and writers. The county also offers public galleries, artist run galleries and a wide variety of commercial galleries, as well as annual gallery and studio tours that enable visitors to visit the homes of local artists, see them at work, and purchase their creations. Any journey through the region can include a wide variety of exciting exhibitions.

The county boasts three significant arts groups, the Arts Council of Northumberland, the Brighton Arts Council and Spirit of the Hills: the Northumberland Hills Arts Association. Membership in these groups is comprised of both artists, artisans and patrons, and all art forms and traditions including the performing and visual arts, media, design, and literature are embraced. The many smaller art clubs and guilds that exist in Northumberland are a testament to the depth of cultural and artistic activities that can be had in Northumberland County.

While interest in the arts is extensive throughout the county, much of the activity in Northumberland County is geared more for resident enthusiasts and hobbyists instead of for visitors from outside the county. Many studios and galleries are seasonal, operate on a “by appointment,” or “open by chance” basis, or do not contain public spaces available to the public.

The following is a list of visual art opportunities in Northumberland:

- 5 Annual Art Events
- 6 Annual Craft Shows/events
- 12 Art Galleries
- 30+ Artist’s Studios
- 2 Annual Studio Tours
- 2 Annual Film Festivals



Arts & Culture - Performing Arts Opportunities

Theatre and performing arts opportunities are numerous and varied from classical music performances at Westben Arts Festival Theatre and Victoria Hall, stage plays and musicals at the Capitol Theatre and the Brighton Barn Theatre, to well known musical bands and performers at the Park Playhouse, Port Hope All Canadian Jazz Festival and the Shelter Valley Folk Festival. Many towns including Warkworth, Brighton, Port Hope and Cobourg, amongst others also have free weekly outdoor musical performances during the summer months at band shells and local parks. Some of the performing arts opportunities available include:

- 6 Annual Music Festivals
- 6 Indoor Live Theatre/Music venues
- 16+ Live Theatre/Music opportunities

As with visual arts opportunities, many of the performing arts opportunities are seasonal in nature, and may be limited in appeal to tourists, given the quantity, quality and variety of similar performing arts offerings made available year-round closer to major nearby urban centres like Toronto or Ottawa.

While the uniqueness of Northumberland County's performing arts venues (Westben Barn for example) cannot be disputed, it also cannot be said that the majority of attendance at such performing arts venues is attributed to tourists.

For example, while total collective annual attendance at performing arts performances and venues is significant (with an estimated 126,000 people annually), the survey indicated that 75%-95% of attendees were from the local area (within 100km).

While arts and culture is an important component in the overall fabric of Northumberland County's tourism industry, it cannot be viewed in isolation as a main reason for tourists to travel to the destination.



Westben Concerts at the Barn, Campbellford

Performing Arts Venue/Opportunity	Genre	Approximate Annual Attendance	Seating/ Capacity	Approximate Number of Performances Annually	Duration
Cameco Capitol Arts Centre (including the AK & Bob Sculthorpe Theatre)	Musical Performances & Live Musicals/Theatre Productions	54,000	380	272	Year Round
The Concert Hall At Victoria Hall	Various genres including Classical, Big Band	40,000	318	100	Year Round
Westben Arts Festival Theatre -Concerts At The Barn	Classical Music	10,000	400	29	Summer
Driftwood Theatre Group – (Touring Theatre Group)	Shakespearean Plays	6,343	Outdoor Event	27*	Summer
Northumberland Players	Live Musical/Theatre Productions	6,000	Depends on venue	40-50	Year Round
Brighton Barn Theatre	Live Theatre/Musicals	3,100	125	25	April-December
Port Hope Friends of Music	Classical Music	2,104	N/A	6-8	September-April
Port Hope Jazz- All Canadian Jazz Festival	Jazz Music Festival	1,500	Outdoor Event	15-20 Groups/ Performers	3 Days (September)
Shelter Valley Folk Festival	Folk Music Festival	1,500	Outdoor Event	20-25 Groups/ Performers	3 Days (September)
Oriana Singers	Chorale Music	1,000	Depends on venue	5-10	August-May
Park Playhouse and Performing Arts Centre**	Live Popular & Contemporary Music	600	400	TBA	Year Round
Auction Barn Jamboree	Country Music & Gospel	300	100-150	25-30 performers	3 Days (September)
Total Attendance		126,447			

*Not all performances in Northumberland

**Opened December 2008

Supporting Attractions - Heritage Sites

Northumberland County is steeped in a rich and fascinating history. The local architectural conservancies and heritage organizations have been instrumental in restoring many buildings throughout the county such as Proctor House in Brighton, Barnum House in Grafton and many homes and buildings in Port Hope and Cobourg. Trent Hills has many heritage farms and is also home to the Trent-Severn Waterway a National Historic Site of Canada. Towns and villages have well-preserved homes and public buildings, many built by United Empire Loyalists during the early years of the 19th century, when a stage coach route linked communities along the north shore of Lake Ontario. Over 20 Ontario historic plaques dot the countryside commemorating these important people and places. Heritage opportunities available in Northumberland County include:

- 10 Museums/Restored Historic Homes
- 3 National Historic Sites
- 382 Designated Heritage Properties/Sites
- 2 Designated Heritage Conservation Districts (Cobourg & Port Hope)
- 1 Heritage Fair
- 5 Public Gardens

Supporting Attractions - Festivals & Events

Northumberland County has numerous annual and seasonal festivals and events. Many waterfront festivals and events occur in the warmer months, including: Cobourg's Sandcastle Festival and Highland Games, Port Hope's Estival, Brighton's Applefest and the Warkworth Long Lunch. Winter months are less active although events such as the Warkworth Maple Syrup Festival, Cobourg's Winter Festival, Capitol Christmas Festival of Trees and the Polar Bear Winter Festival/Chocolate and Cheese Festival in Campbellford all take place. During the fall many communities have agricultural fairs. The Port Hope fair is in its 178th year, and is joined by Roseneath, Campbellford/Seymour, and Warkworth annual agricultural fairs. Museums and home and garden tours, such as the Architectural Conservancy of Ontario (ACO) Port Hope House Tour, give further opportunities to immerse oneself in Northumberland County's cultural and historic richness.

The following festivals and events occur annually:

- 87 Festivals/Events collectively attended by over 276,758 people
- 36 Non-Music Festivals
- 1 Aboriginal Festival/two Aboriginal Events
- 4 Agricultural Fairs/ 1 Living Green Fair



Northumberland Ribfest, Cobourg

Supporting Attractions - Shopping & Dining

Northumberland County offers numerous shopping and dining opportunities. Specialty shops in Warkworth, Port Hope and other communities offer unique merchandise and gift ideas. Hoselton Studios in Colborne has a gift shop and factory where you can watch hand-cast aluminum sculptures, renowned for their quality and elegance, being made. Antique, boutique and specialty shops abound. Port Hope alone has nearly 20 antique shops, and there are many more throughout the county, many housed in beautifully-restored heritage buildings. Specialty outlets featuring chocolate, cheese and candles in Trent Hills offer a variety of shopping experiences. Most communities also host weekend farmers' markets where one can buy fresh, local produce, or visit farms and purchase products at the farm gate.

Northumberland County has a range of dining options. With a majority being categorized as mid-range however a few are in the range of high-end. Although many are classed as mid-range many have local recognition and great value. A total of six have wine lists greater than 25 labels and two have extensive wine lists. In terms of accredited chefs, few have this distinction. It cannot be said that restaurants in the area have name recognition beyond the local region. Some local dining facilities are offering locally produced food product and display those options on their menus. Culinary tourism has not yet emerged as a major tourist draw, because many of the businesses are not market ready. Many local groups have been discussing this topic, and are interested in developing this aspect of tourism. Shopping & Dining experiences available in Northumberland County include:

- 4 Antique Markets
- 40+ Antique Stores
- 12 Local and Native Craft Stores
- 50 Specialty Shops
- 6 Factory Outlets
- 5 Farmer's Markets
- 5 Fine Dining Restaurants
- 162 Mid-priced Restaurants
- 65 Fast Food Restaurants



Outdoor Recreation Cluster

Outdoor recreation has played a large part in the make-up of Northumberland County tourism offering for many years. A cluster of outdoor activities are available year-round and appeal to both mass and niche markets. The diversity of outdoor recreation experiences available provides visitors with a variety of things to do during each season. These experiences are enjoyed by all age groups and market segments. Many of the outdoor recreation experiences are located close to accommodations and food & beverage establishments.

Northumberland County's rural and urban landscapes offer visitors everything from an easy hike along the Waterfront Trail or beside gently flowing rivers, boating trips on the Trent-Severn Waterway, snowmobiling the E108 provincial trail, to adventurous cycling excursions, cross-country ski routes, a large variety of sport fishing, or golfing within the rolling hills.

Land Based Outdoor Recreational Opportunities

With two provincial parks and numerous green spaces such as parks, forests, conservation and 1903 Km² of land, outdoor recreational activities are almost endless from hiking, cycling, camping, mountain biking, horseback riding, bird watching, golfing and ATV's. Winter activities include snow showing, cross-country skiing, skating, and ice fishing.

Presqu'ile Provincial Park is popular amongst visitors, with many campers and daytrippers. Presqu'ile is renowned for birding with over 200 species recorded annually. Presqu'ile's impressive bird numbers are due to its location, shape, and diversity of habitats. Presqu'ile is French for "almost an island" and is a boomerang-shaped spit of sand and limestone that juts sharply into Lake Ontario. Presqu'ile is also a staging and breeding ground for the monarch butterfly and is an excellent location to study the species. With a total of 394 reservable campsites, plus beaches, trails, history, and plenty of wildlife viewing, Presqu'ile had 210,000 visitors in the 2008 season.

Ferris Provincial Park is located in the northeast part of the county near the town of Campbellford. Camping is available with large spacious sites and unspoiled acres of woods and riverbanks. The trails in the park are opened all year around. Improvements this year to the park include electrical sites and updated and improved trails. The Ranney Gorge Suspension Bridge is also located at the park, where a visitor can view the Ranney Falls and watch as boats maneuver the Trent-Severn Waterway as an added attraction.

The Northumberland County Forest (NCF) is located within the municipal boundaries of the Township of Alnwick/Haldimand. The NCF is 5,424 acres in size and is located approximately 7 Km. north of the hamlet of Baltimore, Ontario. Forests now occupy about 36% of the total area in Northumberland County and the NCF represents 3% of that.

Recreational use in the forest consist of all-terrain vehicle use, cycling, mountain biking, hiking, cross country skiing, hunting, equestrian, wild life viewing, birding, snowshoeing, snowmobiling,

dog sledding, as well as groups such as boy scouts using the forest as an educational tool. In 2008 the amount of estimated visitors to the forest was 7,500.

With the forest being in such close proximity to the GTA the use of forest during the past few years has seen an increase of recreational use. Northumberland County and the Forest Advisory Committee have introduced The Forest Master Plan, which creates more marked trails for all users and protects the well being of the forest and its habitat.

Ganaraska Forest is located in the northwest section of the county and is managed by the Ganaraska Region Conservation Authority. The forest has an estimated 300 km of trails for use by all skills levels. Recreational use in the Ganaraska Forest is high due to the location being near GTA, Peterborough, and Durham Region. During 2008 the forest received 25,000 visitors. Recreational use in the forest consists of all-terrain vehicle use, cycling, mountain biking, hiking, cross country skiing, hunting, equestrian, wildlife viewing, birding, snowshoeing, snowmobiling, dog sledding. Also in 2008 the forest received the International Mountain Biking Association (IMBA) epic trail award for mountain biking.

In the fall of 2009 the newly built Ganaraska Forest Centre opened. This facility is wheelchair accessible, and offers meeting facilities. Northumberland's Outdoor (Land Based) Recreation opportunities include:

- 5 road bike routes (totaling 286 km's) and 17 mountain bike trails
- 15 conservation areas and 5 conservation reserves
- 2 Provincial Parks (with 10 campgrounds/457 campsites)
- 2 managed forests
- 1 Provincial Wildlife Area
- 26 day hiking opportunities with over 37 trails (totaling over 1021 km)
- 30 bird watching sites
- 8 equestrian trails and 4 equestrian facilities
- 11 golf courses
- 21 cross country & 19 snowshoeing opportunities (with over 39 trails)
- 3 snowmobile clubs, 10 snowmobile and 3 ATV opportunities



Water Based Outdoor Recreational Opportunities

Many Ontario destinations have water based opportunities but in Northumberland County water plays a large role in the makeup of what the destination offers to visitors. With Rice Lake to the north, and Lake Ontario to the south, the Ganaraska River in the west and Trent-Severn Waterway in the northeast the county is literally surrounded by water. There are 23 marinas, and a total of 1401 seasonal slips and 236 transient slips throughout Northumberland. The physical geography of the area provides plentiful recreational resources with numerous opportunities for boating, sailing, waterskiing, wakeboarding, canoeing, kayaking, swimming, scuba diving, and fishing.

Trent-Severn Waterway is a National Historic Site of Canada and provides unique water based experiences. With historic locks and canals and beautiful scenery it has been called “one of the finest interconnected systems of navigation in the world.” Northumberland County has a total of eleven locks on the Trent River. In the 2008 season 120,741 boats passed through the locking system. Lock 18 in Hasting is the busiest lock within Northumberland County. National Geographic rated the Trent-Severn Waterway as one of its Top 500 trips on the planet.

The abundance of water in the county also attracts many campers and cottage goers. With Presqu'ile Provincial Park on Lake Ontario, and Ferris Provincial Park on the Trent River, part of the Trent-Severn Waterway attracts many tent campers as well as daytrippers. Rice Lake and the Municipality of Trent Hills have an abundance of cottage rentals, RV sites, fishing resorts and marinas.

Lake Ontario borders the southern part of the county with Port Hope, Cobourg and Brighton having marina's and beaches. The lake plays an important part in tourism within the county. Many activities take place on the lake such as sailing, windsurfing, fishing, swimming, canoeing kayaking and dragon boat races. Cobourg Marina offers sailing lessons and also has a dragon boat team. Also on Cobourg's beach (Victoria Park) many festivals and sporting activities take place during the summer months. Northumberland County's Water Based opportunities include:

- 15 public beaches and swimming locations
- 5 public swimming pools
- 2 scuba diving sites/opportunities
- 18 public boat launches
- 23 marinas
- 3 yacht clubs
- 1 sailing school
- 1 wakeboarding school



Angling and Sport Fishing

Because it is surrounded by major waterways, Northumberland County has numerous angling opportunities all year-round, and is one of the most diverse fishing hot spots in Southern Ontario. Walleye (pickerel), small and largemouth bass, carp, muskie (muskellunge), Chinook salmon, Coho salmon, pink salmon, Atlantic salmon, steelhead (rainbow trout), brown trout, lake trout, fresh water drum, northern pike, and numerous species of panfish can all be found in the waters of Northumberland County.

Northumberland County falls into the Ministry of Natural Resources Fisheries Management Zone 17 (FMZ 17). FMZ 17 is the smallest management zone in the province, however due to the angling opportunities available and its proximity to the Greater Toronto Area, FMZ 17 receives more angling effort than most other zones in the province. The zone also supports important recreational and tourism-based fisheries.

Fishing takes many forms depending on the water, species sought, the equipment, the location and the type of experience wanted. Many activities relating to fishing take place throughout the county from family fishing events held by Bob Izumi to serious bass tournaments hosted by Bassmasters for example. Family fishing, fishing charters and guides, trophy fishing, tournaments, fly fishing, shore fishing and ice fishing can all be easily accessed through many public boat launches and conservation areas. The following are Northumberland's sport fishing and angling opportunities:

- 24 sport fishing locations (Lake Ontario, Rice Lake, Upper and Lower Ganaraska River, Trent River, numerous smaller creeks and streams).
- 3 ice fishing locations: Presqu'ile Bay, Trent River (Percy Boom and Campbellford) and Lindwood Acres Trout Farm
- 18 public boat launches
- 17 species of freshwater game fish
- 23 Marinas (with 1401 seasonal slips/236 transient slips)
- 1 public fish hatchery & 1 private trout farm
- 6 fishing charters/outfitters/guide services
- Average of 30-40 fishing tournaments per year

Rice Lake

Rice Lake supports one of Ontario's largest and most productive inland fisheries. Part of the Trent-Severn Waterway, the lake is very shallow (max. depth 27ft), and approximately 37 kilometers long and 4.8 kilometers across. Rice Lake has been referred to as a fish factory by the Ministry of Natural Resources, because it still produces the most fish per acre of any lake in Ontario. Known for its bass, walleye (pickerel), muskie (muskellunge) and panfish including perch, bluegill, sunfish, and crappie, the lake is also becoming known for its carp fishing.

Many fishing publications rank Rice Lake high in their charts. Outdoor Canada ranks the lake number two on its, “Best Largemouth Bass Destinations in Canada and Hot Spots '09.” Tom Brooke, Vice-president of Shimano and chairman of the Canadian Sport fishing Industry Association, lists Rice Lake as a best place to fish for crappie. Also, Top Canadian TV fishing show hosts placed Rice Lake 33rd on their favorite places to fish list for Largemouth bass in Canada out of 187. Bob Izumi Real Fishing show (Canada’s longest running fishing show) fishes in Northumberland County often and has featured Rice Lake on his show numerous times. With over 40 tournaments in 2008 and recognition or reference of Rice Lake by people in the sport fishing business the lake ranks high as an excellent location to fish.

Rice Lake attracts mostly residents of Ontario, however there are notable numbers of American anglers. Sport fishing helps support the many resorts, cottage rentals, and camp sites available along the lake. Many marinas and resorts on the south shore rent boats, and have fishing tackle, live bait, boat launches and licenses available.

Lake Ontario

Lake Ontario offers some of the province’s best fishing, which enhances Northumberland County’s sport fishing offering. With many species of fish prospering in these waters the most sought after are the Chinook salmon and the steelhead trout (rainbow trout). Other species that also share the water are Coho salmon, pink salmon, Atlantic salmon, brown trout, lake trout, northern pike, small and largemouth bass, walleye (pickerel), fresh water drum, and carp.

Port Hope, Cobourg, and Brighton all have marinas, harbours, and public boat launches on the lake, with Port Hope also having a fish cleaning station. The majority of fishing charter businesses work out of Port Hope and Cobourg harbours.

Many publications rank Lake Ontario high; Outdoor Canada ranks the Lake 4th on its list of 25 hot spots for salmon comparing it to Lake Huron and Queen Charlotte Islands in BC. The stretch of Lake Ontario from Whitby to Port Hope is known as being a good location for those fishing for salmon, especially because it is at the mouth of the Ganaraska River (Outdoor Canada).

From the second week in July until the last week in August the annual Great Ontario Salmon Derby takes place. It is the largest fresh water tournament in North America; last year approximately 20,000 anglers entered for a chance to win one of the many large weekly prizes and the final grand prize. According to Walter Oster, Chairman & Tournament Director, Port Hope is one of the most popular marinas. Many participant anglers are from Ontario and there are notable derby participants from Quebec, Pennsylvania, New York, and Michigan. Port Hope had two winning fish in the 2007 tournament.

Ganaraska River (The Ganny)

The Ganaraska River is recognized as one of the best trout streams in Ontario. This claim is further supported from the numerous blogs and fishing reports related to this river. Many fly fishing groups and clubs refer to the Ganaraska River as one of Ontario's greatest steelhead streams. Some of the largest steelheads within the province are caught here yearly. In addition to steelhead, the Ganny also boasts large numbers of Chinook salmon, some in excess of 30lbs.

Anglers can fish the river during all seasons. Spring brings in the run of the highly sought after steelhead by many fly anglers as well as float anglers who line the banks. Mid-summer is a time when many species enter the river, including pike, walleye, perch, catfish, smallmouth bass and freshwater drum. During the fall season the salmon start to run and the river banks are once again lined with anglers. Winter fishing is not as busy as other seasons, although on warm winter days some angler's fish south of the CN Rail bridge and some even fish through the ice.



Trent River

The Trent River is a part of the Trent-Severn Waterway and flows through the Municipality of Trent Hills and Ferris Provincial Park. The river which is accessible through several conservation areas has many species of fish inhabitants, for example, walleye (pickerel), carp, muskie, panfish, pike, and small and largemouth bass. Anglers also ice fish along the river at Percy Reach and near the locks.

Fishing the Trent-Severn Waterway (TSW)

The combined waters in the Trent-Severn Waterway are the most fished in the province and the most popular are the Kawartha Lakes (Pigeon, Rice, Scugog and the Trent System) combining for just under 1.2 million angling days reports the "Recreational Fishing on Trent-Severn Waterway", by the Ontario Federation of Anglers and Hunters. The report also states:

Links to Attractors

Northumberland County'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 "Northumberland County" includes the 7 municipalities of Port Hope, Hamilton Township, Alnwick/Haldimand Township, Cramahe Township, the Municipality of Brighton, the Municipality of Trent Hills and the Town of Cobourg.

The southern part of the region is the most populous and developed, and contains the larger urban centres of Cobourg, Port Hope, and Brighton. All three towns lay on the shore of Lake Ontario. The northern region is mostly rural and forested land, with Rice Lake at the most northern border and the Trent-Severn Waterway to the northeast. River and streams can be found throughout the county as part of the watersheds.

Northumberland County is bounded by:

- Peterborough & Kawarthas - North
- Quinte West - East
- Durham Region - West
- Lake Ontario - South





Physical Links to Attractors

There is a definite connection between the identified Core Attractors and the physical setting of the destination. The core attractors: *Picturesque Towns*, *Rural Landscapes and Cultural Cluster*, *Outdoor Recreation Cluster* and *Angling & Sport Fishing* are all closely intertwined with the physical setting. For example, boating and fishing could not take place on the scale and in the quality it does if Northumberland County was not surrounded by water, with the ample access points through public launches and marinas. Topography of the area includes rolling landscapes and natural areas with unique flora and fauna. Rich farmlands to the north are part of Ontario's Greenbelt and offer numerous hiking and cycling trails.

Land based *Outdoor Recreation Opportunities* are also closely related to the diverse physical settings offered by the distinct geography of Northumberland County. Hiking, fishing, camping, biking for example all rely on the physical setting in which the activity takes place. This includes the natural "wilderness", rural agriculture, and the urban town and country settings throughout the county. Even stand alone attractors are tied to the physical setting, mainly due to where the event or structure is located. For instance, the Shelter Valley Folk Festival, or a concert at the Westben Arts Festival Barn are events whose unique settings are contributors to the enjoyment of the experience.

Northumberland County, along with the five regions of The City of Kawartha Lakes, Durham Region, Haliburton Region, Peterborough and the Kawarthas, and Bancroft and District participate in a central Ontario marketing initiative branded as “Getaway Country”. Beyond this, opportunities to build on complementary tourism attractions/activities with nearby destinations have not yet been fully assessed.

Historical Links to Attractors

There is a linkage between Core Attractors and the history and culture of Northumberland County. Water based experiences are connected to the number of homes and cottages that have existed for many years. Areas such as Rice Lake have been a tourist destination since the days of stagecoaches, steam engines, and paddle-wheeled steamers. As well there is a connection to boating, fishing, and historical travel routes in the chain of lakes that make use of the Trent-Severn Waterway (TSW). The creation of the Trent-Severn Waterway was instrumental in 1837 in opening up the area to settlement and commerce, and now tourism.

Alderville First Nation was founded during the mid-1830s as a relocation of the Mississauga Ojibway groups that inhabited the Bay of Quinte-St Lawrence River corridor in what is today eastern Ontario. Their history is rich as military allies of the British in the development and defense of Upper Canada and even before that in their conquest over "the Mohawks" some 300 years ago. The Alderville First Nation adds to the cultural experiences visitors can experience.

Following the war of 1812 many port towns, Cobourg in particular, became important centres for commercial activity and a landing point for European settlers arriving on steamers. In the 1840s and 1850s Irish immigrants landed here to embark on a new life. 1859 saw the dream of an international port die with the failure of the Cobourg-Peterborough Railroad. The 1876 America’s Cup challenger "Countess of Dufferin" and the steamship "Cobourg" called this port home. Between 1907 and 1950 the large freight-car / passenger ferries "Ontario 1" and "2" sailed between Cobourg and Rochester.

Two of Canada’s most important 19th century writers once travelled, lived and wrote early accounts about life in Northumberland County. Historical linkage also arises from interesting and quaint communities settled along Lake Ontario that were once linked by Steamship routes and Lake Ontario’s stagecoach route – now known as the Apple Route. In the 19th century, Cobourg was the northern point of a water-based commercial triangle that included Oswego and Rochester, New York. Minerals and lumber were brought to the harbour by rail from Ontario's interior, while Pennsylvania coal arrived by ship.

Wealthy Americans sailed Lake Ontario from the Port of Rochester and built opulent mansions as summer homes. Belden's 1878 “Illustrated Historical Atlas of Durham and Northumberland Counties” said: “Of late, Cobourg has begun to come somewhat into vogue as a summer resort for tourists and pleasure-seekers generally. The reason for this, apart from the pleasant situation of the town and the delightful drives in its neighbourhood, is to be found in the excellence of its hotel accommodations.”

Ships continued to bring tourists and coal to Cobourg's port well into the 20th century, but the town's industrial character began to wane through the 1960s. Ever since the days of stagecoaches, steam engines, and paddlewheel steamers, Rice Lake has been a tourist destination. Today, Rice Lake offers not just fishing, but many other things to see and do both on and near the lake, and in the surrounding countryside and villages and towns containing well-preserved homes and public buildings, many which were built by United Empire Loyalists during the early years of the 19th century.

The Canadian Fire Fighters Museum in Port Hope collects, preserves and exhibits artifacts that depict the history and development of fire fighting in Canada. Included is a collection of fire apparatus representing hand-drawn, horse-drawn, and motorized periods, as well as photo displays, helmets, turnout gear and tools of the trade, and a working box alarm system.

The Roseneath Carousel is a restored forty-horse and two-boat antique wooden carousel built in 1906 in Abilene, Kansas - nostalgic music provided by a 1934 Wurlitzer Band Organ complete with paper rolls! Located, owned and operated since 1932 by the Roseneath Agricultural Society inside a heritage designated, sixteen sided wooden building on the Roseneath Fairgrounds.

Barnum House in Grafton is a superb example of a prosperous Upper Canada home. This elegant classical building was erected about 1819. Though its interior has been modified several times since, the façade remains essentially unaltered. In the first historic house restoration undertaken in the province, the structure was refurbished by the Architectural Conservancy of Ontario in 1940. Since 1982 its continued preservation has been entrusted to the Ontario Heritage Foundation.

The Historic Cobourg Jail was one of the biggest of its time, holding up to one hundred inmates. The jail was closed in 1998 and has since been converted into a luxury 20+ Room Country Inn & Hotel, complete with restaurant, banquet and conference facilities and a museum with historic jail exhibits. The museum has been incorporated into the King George Inn and Hotel. Much of the original ambience has been retained. The individual cells are now individually themed guest rooms, and what used to be a dungeon is now the continental breakfast room.

While Northumberland County's core attractors offer collective appeal, there are other Ontario destinations that offer similar products and experiences. The nearest competitive destinations and their distance from Northumberland are:

Competitive Destination	Distance (KM) from Cobourg, Northumberland County
Peterborough & the Kawarthas	53
Prince Edward County	80-90
Quinte West	60
City of Kawartha Lakes	83
Durham	60
York Region	118

Northumberland County's natural beauty in terms of forests, nature, trails and rural landscapes with rolling hills, and quaint villages and pastoral scenery are second to none and enable Northumberland County to stand out as distinct from its competition. Exceptional water and water related activity opportunities along Rice Lake, The Trent-Severn Waterway and the Lake Ontario Shoreline further support Northumberland's distinctive appeal.

The destination offers diversity of attractions and activities, from numerous festival and events, its arts and entertainment facilities as well as its cultural heritage. The full calendar of events features something happening on almost every weekend of the year. Among the better known attractions are the Westben Arts Festival, the Capitol Theatre in Port Hope and the Art Gallery of Northumberland in Cobourg. The County is also home, however, to numerous smaller private galleries and artisan shops.

The Rice Lake area is home to some of the most beautiful and endangered plants in North America. Few people realize that prairies extended as far northeast as the Rice Lake area. You can visit a restored prairie project with a demonstration garden at Rainbow Cottages Resort. From canoeing in the solitude of nature, to the excitement of visiting a nearby picturesque town, the options are more plentiful than other resort districts further away from human activity.

There is easy access by highway (401) or train (Via Rail) and the location is in close proximity to Toronto and the GTA. Port Hope and Cobourg are both only one hour east of a major urban market of over 5 million people. Cobourg has Ontario's busiest rural community train station.

All of these features make Northumberland County an attractive, distinctive and appealing tourism destination.

It cannot be claimed that Northumberland County offers a better guest experience than other destinations, as there is currently no region wide visitor survey program in place. Therefore, we cannot affirm that the experience guests receive when visiting is superior. Some individual businesses track customer satisfaction levels of their customers and guests, but do not generally share this information.

Northumberland County does not currently have a product positioning statement that it uses in its advertising and promotional material to market the destination that positions the destination in the minds of the visitor market. Northumberland County Tourism often uses the phrase "only one hour east of Toronto." A brand development strategy will be considered to help more clearly define and position Northumberland County for the visitor market. Signage will help in creating a product positioning statement and is in the process of completion.

Market Appeal

A2. 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 market segments.		✓	
ii.	Core attractions are relevant to a tourist market base. The base market is considered to be both a mass and niche market.	✓		
iii.	Attractions appeal to guests from beyond Ontario's borders.			✓
iv.	The market segments for whom 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.	✓		

Northumberland County's tourism products and experiences have both "mass" and "niche" or (special interest) appeal and provide visitors with a wide variety of things to see and do. Core attractors are relevant to both mass and niche markets, and segments are characterized as touring families, seniors, shoppers, golfers, theatre and music enthusiasts, boaters, anglers, and cyclists, among others.

Mass Appeal	Niche Appeal
Outdoor Recreation	Hiking
Water based Activities	Fishing
Attend a fair, festival or event	Boating
Shopping	Bird/Nature Watching
Sightseeing	Cycling
Historic Attractions	Golfing
Camping	Visit a Spa

Northumberland County has attractions and resources that appeal to a variety of market segments from a wide geographic area. Attractions appeal to guests from beyond Ontario's borders, but only 8.1% of guests come from outside the province.

Geography Origin of visitors/guests as reported in the Resource Audit	
Origin	Average % across all sectors
Local	58%
Regional	15%
Provincial	14%
National	3%
U.S. Short Haul	5%
U.S. Long Haul	2%
International	2%

Source:PRTD Survey, 2009

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 purposes of marketing, has refined the primary markets for Ontario into four segments:

- Upscale Adventurers
- Provincial Families
- Young Go-Go’s
- Retired Roamers

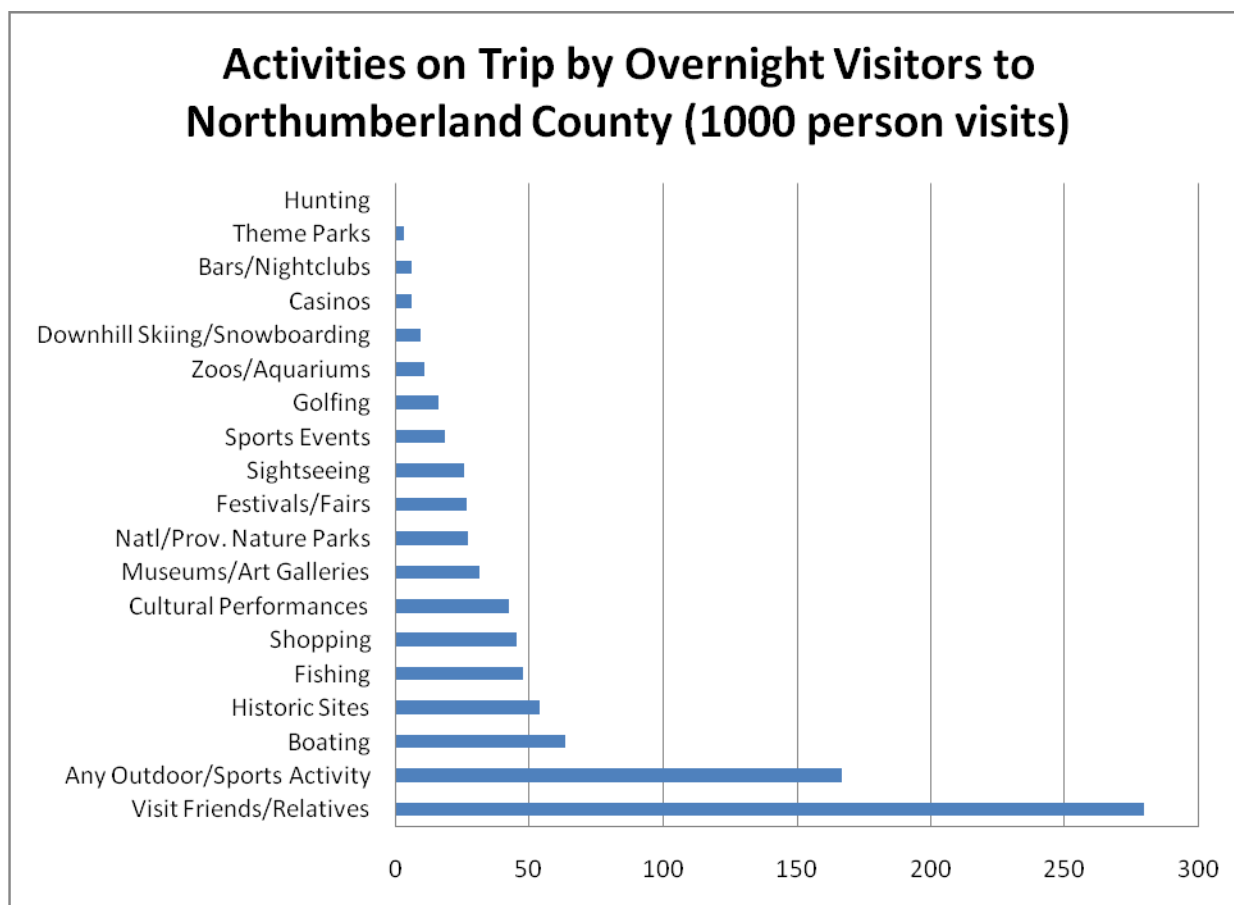
Name	Upscale Adventurers	Provincial Families	Young Go-Gos	Retired Roamers
Description	 <p><i>Well-off older middle-aged married couples with adult-age children & some empty nests</i></p>	 <p><i>Well-off younger and middle-aged suburban and exurban families with lots of children</i></p>	 <p><i>Young successful, well-off, multi-ethnic urban trendsetters</i></p>	 <p><i>Midscale mature and older retirees and seniors living in suburbia and towns</i></p>
Market Size	558,366 (11.64%) ON hhds	952,610 (19.84%) ON hhds	181,124 (3.78%) ON hhds	590,162 (12.3%) ON hhds
Demographics Lifestyle:	<ul style="list-style-type: none"> •Middle aged (45-64) families; Kids (18+) •Large (Over 1/3 with 4+) 	<ul style="list-style-type: none"> •Lower middle-aged (35-54) families; Kids (< 15) •Large (57% with 4+) 	<ul style="list-style-type: none"> •Young (25-44); Singles; no kids •Small (73% 1 or 2 people) 	<ul style="list-style-type: none"> •Mature (55+), no kids •Small (67% 1 or 2 people)
HH Size:	<ul style="list-style-type: none"> •Own; Older single-detached 	<ul style="list-style-type: none"> •Own; Newer singles and semis 	<ul style="list-style-type: none"> •Rent 	<ul style="list-style-type: none"> •Own; Older single-detached, 27% rent
Housing Type:	<ul style="list-style-type: none"> •University (42%) 	<ul style="list-style-type: none"> •College (28%) 	<ul style="list-style-type: none"> •University (55%) 	<ul style="list-style-type: none"> •High School, College
Education:	<ul style="list-style-type: none"> •White Collar (41%), Self Employed (14%) 	<ul style="list-style-type: none"> •Mixed 	<ul style="list-style-type: none"> •White Collar (48%), Service (38%) 	<ul style="list-style-type: none"> •Mixed, White & Blue, Self-employed (13%)
Job Type:	<ul style="list-style-type: none"> •Public Transit, Car 	<ul style="list-style-type: none"> •Car 	<ul style="list-style-type: none"> •Public Transit, Walk, Bike 	<ul style="list-style-type: none"> •Car, 6% Walk
Commuting:	<ul style="list-style-type: none"> •Average (31% Imm. Pop) 	<ul style="list-style-type: none"> •Low (26% Imm. Pop) 	<ul style="list-style-type: none"> •Strong (33% Imm. Pop) 	<ul style="list-style-type: none"> •Low (15% Imm. Pop)
Ethnic Presence:	<ul style="list-style-type: none"> •English and French 	<ul style="list-style-type: none"> •English 	<ul style="list-style-type: none"> •English and French 	<ul style="list-style-type: none"> •English
Language:	<ul style="list-style-type: none"> •\$121,848 (54% above avg) 	<ul style="list-style-type: none"> •\$103,182 (31% above avg) 	<ul style="list-style-type: none"> •\$91,492 (16% above avg) 	<ul style="list-style-type: none"> •\$64,838 (18% below avg)
Average HH Income:	<ul style="list-style-type: none"> •Europe, Golf/Ski in Ontario 	<ul style="list-style-type: none"> •Ontario, family destinations 	<ul style="list-style-type: none"> •Worldwide travel, Canada 	<ul style="list-style-type: none"> •Mainly North America
Travel Behaviours Destinations	<ul style="list-style-type: none"> •2,846,260 	<ul style="list-style-type: none"> •4,757,604 	<ul style="list-style-type: none"> •721,763 	<ul style="list-style-type: none"> •2,699,941
# of trips in ON	<ul style="list-style-type: none"> •Index 129 	<ul style="list-style-type: none"> •Index 112 	<ul style="list-style-type: none"> •Index 136 	<ul style="list-style-type: none"> •Index 117
Access to Cottage Channel	<ul style="list-style-type: none"> •Online 	<ul style="list-style-type: none"> •Multiple, vehicle rentals 	<ul style="list-style-type: none"> •Online, discount brokers 	<ul style="list-style-type: none"> •Discount broker, self-book
Key Behaviours Leisure	<ul style="list-style-type: none"> •Ballet, Opera •Ski, Tennis, Golf •Casinos, Sporting events 	<ul style="list-style-type: none"> •Outdoorsy; jet/snow skiing, skate/snowboarding •Theme parks, bowling 	<ul style="list-style-type: none"> •Concerts, clubs, movies •Health clubs, skiing 	<ul style="list-style-type: none"> •Festivals, fairs, markets •RV, garden, boat shows
Media	<ul style="list-style-type: none"> •Read Newspapers •Use Internet •Do not like flyers 	<ul style="list-style-type: none"> •Plays, dinner theatres •Light TV, Radio users •Average internet 	<ul style="list-style-type: none"> •Restaurants •Hiking, camping •Heavy internet, newspapers •Do not like direct mail 	<ul style="list-style-type: none"> •Curling, snowmobiling, hunting, fishing •Above avg TV /Radio/ newspapers
Travel Motivations	<ul style="list-style-type: none"> •Connection •Attention to Detail •Afidonados •Flexibility & Technology 	<ul style="list-style-type: none"> •Time Savers •Group Travel •Family Vacations •Status 	<ul style="list-style-type: none"> •Flexibility & Ecology •Escape •Originality •Attention to Detail 	<ul style="list-style-type: none"> •Nature •Information •Price •Nationalism
Key Markets	<ul style="list-style-type: none"> •Toronto •Ottawa •Mississauga •London 	<ul style="list-style-type: none"> •Mississauga •Brampton •Hamilton •Ottawa 	<ul style="list-style-type: none"> •Toronto •Ottawa •London •Hamilton 	<ul style="list-style-type: none"> •Hamilton •Ottawa •Toronto •London

Although the destination will attract visitors from all four segments, the primary segments for which Northumberland’s attractions have a compelling appeal are Provincial Families and Retired Roamers.

These markets generated the following numbers of trips in Ontario in 2007:

Tourist Market	# of trips in Ontario	# of trips in Northumberland County
Any Outdoor/Sports Activity	21,692,000	290,000
Boating	6,483,000	71,000
Nat'l/Prov. Nature Parks	5,039,000	30,000
Fishing	4,902,000	59,000
Cultural Performances	4,267,000	56,000
Festivals/Fairs	2,200,000	66,000
Golfing	2,179,000	22,000
Museums/Art Galleries	3,735,000	34,000

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



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

While the appeal and variety of attractions within Northumberland cannot be disputed, the survey indicated that the majority of guest visitation is from people within the local or regional area and attractions do not attract a significant number of guests from beyond Ontario’s borders.

Attraction	Appeal					
	Local	Regional	Provincial	National	U.S.	Int'l
Art Gallery of Northumberland	50%	20%	10%	10%	8%	2%
Brighton Applefest	60%	15%	10%	7%	7%	1%
Northumberland Ribfest	65%	20%	15%	-	-	-
Concert Hall at Victoria Hall	75%	25%	-	-	-	-
Westben Concerts at the Barn	75%	20%	3%	2%	-	-
Memory Junction Museum	20%	10%	30%	15%	3%	22%
Float Your Fanny Down the Ganny	60%	2%	20%	-	-	-
Warkworth Maple Syrup Festival	60%	30%	5%	2%	2%	1%
Port Hope Jazz Festival	80%	-	20%	-	-	-
Cameco Capitol Arts Theatre	95%	5%	-	-	-	-

Source: PRTD Survey, April 2009

Core attractors and complimentary attractions attract visitors on a year round basis, with visitation being almost at par during the spring summer and autumn months. Visitation during the winter months falls by only 10% compared to the rest of the year. This can be attributed to the close proximity to Toronto and the large number of winter activities such as cross country skiing, snowmobiling and ice-fishing as well as a number of winter festivals and events held between January and March.

Northumberland Visitation By Season			
Q1	Q2	Q3	Q4
18%	27%	28%	27%

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; and, entertainment, shopping and dining.

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

B1. Northumberland County 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 stand out as memorable to visitors because of their uniqueness and the variety of experiences offered. Northumberland County’s picturesque landscapes, historical buildings, small town charm and variety of outdoor activities all combine to make experiences memorable and the close proximity to the GTA (Greater Toronto Area) is also appealing.

Being surrounded by water, farm lands, rolling hills with outstanding views, numerous conservation areas, and two provincial parks makes Northumberland County stand out from other counties in close proximity. Many unique festivals and events attract mass and niche groups of tourists. All three core attractors are memorable and are the greatest factor as to why people return to the area.

The core experience is *almost* “consumed” over a period greater than 24 hours. Although many of the individual activities visitors participate in are only a few hours to 1 day in duration, the combination of activities can expand visitation from a period of 24 hours to possibly several days. For example, if visitors attend a live performance, they will most likely spend more time dining and a few more hours shopping.

The core experiences and their typical duration are:

Activity (e.g./round of golf)	Duration (hrs/day)
Fishing	1-2 Days
Fishing Charters	½ Day – 1 Day
Boating	1-2 Days
Hiking	½-1 Day
Cycling	½ -1 Day
Driving Tours	½ -1 Day
Camping	2 Days – 1 week

A variety of on-theme activities are available to give guests a reason to stay overnight. Examples of these activities and their typical duration are:

Activity	Duration (hrs/days)
Shopping/Antiquing	1-2 Days
Dining	1-3 Hours
Performing Arts	1-3 Hours
Sightseeing/Touring	½-1 Day
Festivals and Events	1-2 Days
Organized Sport Tournaments	1-2 Days

The average length of stay in Northumberland County is not greater than 24 hours. Being in such close proximity to the GTA and other urban areas gives visitors more opportunity to come for day trips. A large number of visitors that do stay overnight are visiting friends and relatives (VFR).

B2. 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 can be validated that core activities are offered on a year-round basis. Recreational sport fishing, touring rural landscapes and picturesque villages, festivals and events, and live theatre take place year-round. Many outdoor activities occur throughout all seasons in the county. The same can be said for on-theme activities.

B3. 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 on the shore of Lake Ontario vs. hiring a fishing charter).

	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 on-theme activities are almost easy to buy. Some attractions do have tickets available for internet purchase, however others require visitors to go to the point of production to purchase tickets. Most outdoor recreational activities are free. Those for which there is a cost (fishing charter for example) can be arranged easily over the telephone or via the internet.

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

Activity	Approximate Price Range
Guided Tour of Proctor House	Free or small Donation
Golfing	\$30-60 a round of 18 holes
Hiking in a Provincial Park	\$8.90 to \$16.80 per day
Snowmobiling in Northumberland County	Seasonal Trail Permit \$230.00
Forest	
Fishing	Free (Ontario Fishing License required)
Fishing Charter/Guide	\$225 to \$490

Also at the Ontario Provincial Parks; you can enjoy "unlimited" daily vehicle entry to all Ontario Provincial Parks while supporting the protection of the natural legacy.

Annual Pass (April 1, 2009 - March 31, 2010) Cost: \$140.00 *

Winter Pass (Dec. 1, 2009 - March 31, 2010) Cost: \$.65.00 *

Summer Pass (April 1, 2009 - Nov. 30, 2009) Cost: \$100.00 *

* Prices are effective April 1, 2009 to March 31, 2010

- B4. 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 most 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.	This range of activities is well promoted to and understood by guests.		✓	
iii.	This range of activities is easy to buy.		✓	
iv.	Groups have cooperatively invested in programming or animating public spaces, gathering and queuing areas.			✓

It can be said that Northumberland County offers a variety of activities with a range of sub-options. Some of these include:

Category/Activity	Business Type	Approximate Price Range
Relaxation	Restaurants/Cafés	\$7.00-\$35.00
	Accommodation/Resorts/B&B's	\$100.00-\$150.00
	Spas	\$20.00-\$300.00
Entertainment	Brighton Speedway	\$2.00-\$18.00
	Festivals & Events	Free-minimal charge
	Theatre/Music Performances	Free-\$65.00
Interpretation	Alderville Black Oak Savanna	\$10.00
	Trent-Severn Waterway	\$1.50-\$27.40
	Cobourg Highland Games	Free-\$10.00
	Campbellford Memorial Military Museum	Free/small donation
Education/Skill Development	Golf Lessons	\$35-45/h
	Canadian Fire Fighters Museum	Free/small donation
	Presqu'île Nature Walks	Entry into park
	Photo Safari	\$150.00-\$415.00
	Sailing Lessons	\$175-\$245/week
Cultural/Historical Understanding	Provincial Parks	\$10.00-\$13.00
	Alderville First Nations	\$0-\$10.00
	Barnum House/National Historic Site	Free/small donation
Outdoor Adventure	Wakeboarding Lessons (1day-1week)	\$65-\$985.00
	Fishing Charters/Guides	\$200.00-\$500.00 per day
	Ganaraska Conservation Area Trails	\$5.00 per day
	Day at Beach	\$135.00 Annual Pass
	Panic City Paintball	Free
		\$15-\$300

The range of activities is almost well promoted to and understood by guests. Northumberland Tourism produces travel guides and niche publications, supports a tourism website, markets in different media including print and web based, and markets to travel trade. The tourism department also attended and exhibited at consumer shows in 2008 including the Toronto Sportsman Show, Outdoor Adventure Show, Motorcycle Show, London Boat Show, Hamburg Outdoor Show, and Canada Blooms. Other local DMO's have a variety of communications and attend shows on their own as well.

Publication	Number of copies/views/shows
Northumberland Travel Guide	90 000
Driving Tour Booklet	10 000
Outdoor Adventure Map	20 000
Northumberland Tourism Website	1511 average unique visits per month
Consumer and Trade Shows	6 shows in 2008

The range of activities is almost easy to buy. Most activities can be purchased at the point of production. Theatrical or musical performances can also be purchased in advance via the internet, telephone, or mail. Many outdoor adventure activities are free, or a small fee. Hotels can be booked easily over the internet or by phone. Tickets for festivals and events can be purchased through DMO's, municipal offices or Chambers of Commerce.

There is little cooperative investment in programming of animating public spaces, gathering and queuing areas. There are limited activities such as seasonal farmer markets and sidewalk sales. Some businesses do provide musicians outside their premises to create a welcoming atmosphere for visitors; however this is not done on a regular basis. BIA's, Chambers of Commerce and other local groups involved in organizing Summer Street Festivals, Fall Fairs and other events such as the Warkworth Long Lunch, effectively animate public spaces, but only for the duration of the event or festival.

- B5. The destination offers cultural experience 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 experience 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
Auction Barn Jamboree	\$15 - \$45
Cameco Capitol Arts Centre	\$12 - \$40
La Jeunesse Youth Orchestra	\$12 - \$15
Northumberland Orchestra & Choir	\$10 - \$25
Oriana Singers	Donation - \$35
Park Playhouse and Performing Arts Centre	\$20 - \$42
Port Hope Jazz- All Canadian Jazz Festival	\$20 - \$80
Proctor-Simpson Barn/Soho's Brighton Barn Theatre	\$15 - \$20
Shelter Valley Folk Festival	\$5 - \$60
The Concert Hall At Victoria Hall	\$10 - \$40
Victorian Operetta Society	\$8 - \$35
Vintage Film Festival	\$8 - \$60
Westben Arts Festival Theatre-Concerts At The Barn	\$15-65

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
Shelter Valley Folk Festival	Sarah Harmer, Murray McLauchlan, Valdy, The Arrogant Worms
Park Playhouse and Performing Arts Centre	Blue Rodeo, Tommy Hunter, Shania Twin, Hedley, Cowboys Junkies, Julian Austin, Doc Walker
Concerts At Victoria Hall	Johnny Winter
Capitol Theatre	Ron James, Classic Albums Live

B6. 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 and accredited chefs.	✓		
iv.	A number of restaurants/chefs have name recognition beyond the local region.			✓

The destination does offer a broad range of dining options at a range of price points:

Restaurant Type	Number of Restaurants	Average Entrée Price Range
Fast Food	65	\$3.00 - \$8.95
Mid Price	162	\$6.95- \$24.95
High End	5	\$18.95 – \$39.95

The average entrée price at a variety of dining options are:

Restaurants	Average Price
Northside	\$19.00
Oasis Bar & Grill	\$20.00
Blue Note Café	\$25.00
Corfu Grill	\$12.00
Frenchies Deli	\$8.95
Capone's Italian Eatery	\$18.00
Captain George's Fish & Chips	\$11.00
Buck's Family Restaurant	\$10.00
Pitcher's Place	\$8.00
Golden Chopsticks	\$8.00
Meet at 66 King	\$7.00
The Buttermilk Café	\$17.00
Capers	\$12.00
The Palm Restaurant	\$24.00

A number of restaurants do have wine lists with more than 25 labels.

Restaurants	# of Labels
The Woodlawn Inn	175
The Northside	156
The Gables	90
Blacksmith's	50
The Matterhorn	45
Oasis Bar & Grill	32

A number of restaurants have accredited chefs. A total of 35 restaurants in Northumberland County have earned an Eat Smart! Award of Excellence for 2009/2010.

Restaurant	Accreditation
Ste. Anne's Spa	Certified Chef de Cuisine
Golden Beach	Red Seal Certified
The Woodlawn Inn	Red Seal Certified
Golden Chopsticks	Japanese Sushi Academy – Master Chef
The Northside	Red Seal Certified
Spice of Life Bar & Bistro	Red Seal Certified
Capone's Italian Eatery	Red Seal Certified
Oasis Bar and Grill	Red Seal Certified
The Buttermilk Café	Red Seal Certified

A few restaurant/chefs have name recognition beyond the local region. Ste Anne's Country Inn and Spa Chef Christopher Ennew C.C.C. and the Woodlawn Inn's John O'Leary have name recognition beyond the local region.

B7. 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 memorabilia 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).		✓	

In terms of retail shopping experience, Northumberland County has a variety of high-end to bargain retailers. Most are independently owned and offer a unique selection of merchandise. There are numerous antique, specialty shops, galleries and gift shops:

Shopping Description	High End	Mainstream/ Average	Bargain/ Discount	Total
Antique Market	0	5	0	5
Antique Shop/Store	5	37	1	43
Bookstores/newsstands	0	12	2	14
China and Linens	0	2	0	2
Crafts	0	13	0	13
Department Store	0	13	6	19
Discount	0	0	13	13
Factory Outlet	2	4	0	6
Farmers' Market	0	5	0	5
Fashion/Clothing	5	40	2	47
Flea Market	0	0	1	1
Gallery	14	27	0	41
Gift/Souvenir	0	40	0	40
Jewelers	0	8	0	8
Liquor Store/Beer Store/Wine	1	24	0	25
Music	0	9	0	9
Specialty Shop	17	40	0	57
Grocery Store	3	11	2	16
Spa/Wellness	5	26	0	31
General/Variety Store	0	49	0	49

Source: PRTD/Survey Resource Audit 2009

Some stores or galleries in Northumberland County have name recognition beyond the local region (branded items or otherwise, excluding chain department stores). Some *examples* of these are:

- **Hoselton Galleries** - Nationally famous for their aluminum sculptures, the distinctive free formed animals, birds and sea life in the Hoselton art collection have been lovingly crafted by a team of fine artisans for over 35 years. Distinctively Canadian, Hoselton sculptures have been presented as gifts to American presidents, African Chieftans, the Archbishop of Canterbury and Queen Elizabeth II.
- **Brent Townsend Galleries** – Canadian Wildlife Artist Brent Townsend. Brent was both the first Canadian and the youngest person ever to win the “Artist of the Year” Award from the collectors Society at the 1989 Western and Wildlife Art Exhibition in Minneapolis, Minnesota. Brent is best known for designing the original polar bear motif on the first Canadian two dollar coin (twoonie) in 1996. A 20' replica of the “twoonie” is on display in Campbellford’s Mill Park. Brent now has his own gallery in Warkworth, Ontario.

- **Frantic Farms Clay & Glass Gallery** – For over 20 years, Monica Johnston has been producing fun, “funky”, and functional porcelain pottery. In 2005, Monica and her glass blower husband Paulus Tjiang opened “Frantic Farms Clay & Glass & Gallery” in the budding arts community of Warkworth to exhibit and sell their high quality, locally made pottery and art glass creations.
- **Paul Portelli Studio** – Paul Portelli is sculptor and creator of whimsical terracotta clay sculptures and masks. Paul was featured in a June 2008 Harrowsmith Country Life magazine article, and has operated a gallery/sculpture studio in Warkworth, Ontario for 22 years where he was instrumental in developing the branding and advertising campaign for that community.
- **Antique Stores, Port Hope** – Port Hope is reputed to be the antiques capital of Ontario, with many vendors all within walking distance. Some of the finest antiques in central Ontario can be found in the heritage district.
- **Kokimo Candles** – Kokimo Candles Ltd. operates “Candle Land” a factory outlet in Castleton, Ontario. Visitors can tour the candle factory and enjoy purchasing candles of many “flavours” or choose from a vast array of candle holders. Owing its success to its primary line, the original Candy Candle, Kokimo is one of Canada’s most unique and loved candle producers and their name is derived from their postal code: K0K 1M0.
- **Smith Creek Antiques** – Located in Port Hope this antique shop carries a general line of Canadiana, focusing on original finish, original paint, and fine tiger maple furniture. It was rated 4th in the Canadian Geographic Ten Best Old-time Shop and Stroll across the country.
- **Clarion Boats** – Located in Campbellford this shop builds and restores wooden boats. With “blue-chip” clientele boats built at this shop run from \$125 000 - \$400 000. They restore famous old boats such as the 1918 Bournema built by John Bournema, one of only three left still in existence. He has many wealthy clients and says “I can’t afford these boats myself”. He has had many reviews in the Toronto Star and builds and restores boat under The Antique and Classic Boat Society of Toronto.

C. SATISFACTION AND VALUE

This section documents the extent to which Northumberland 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 these attributes. It also evaluates how Northumberland is investing in improving its performance in these areas.

C1. 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.			✓

The answer to this question is unknown as there is currently no county-wide guest experience survey program in place or conducted.

C2. 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.			✓

Individual businesses may monitor satisfaction levels but rarely is this information shared throughout the tourism industry. 77% of businesses surveyed indicated that they did attempt to obtain some degree of feedback from their customers by a variety of means (comment cards, guest book, e-mail website, verbal etc.). Northumberland Tourism has in the past attempted to survey guests at key retail restaurants and accommodations on a voluntary basis, but owing to the small sample size, the survey results were inconclusive. There are therefore no survey results to measure recent guest satisfaction.

C3. 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 experience and service prices are monitored and are staying constant or trending up.	✓		
iii.	Visitation is trending upwards.			✓

The value or opinion of guest experiences cannot be determined since there is currently no county-wide survey in place for this measurement.

The current majority of key experience and service prices are trending upwards as shown by the chart below:

<u>Key experience or Service</u>	<u>Current Price</u>	<u>Trend (e.g., up, flat)</u>
Golf Greens Fees	\$22-\$60	Steady
Roofed Accommodations	\$65-\$350	Increased 5%-15%
Entertainment Ticket Prices	\$8-\$80	Increased 5%-10%
Restaurant Meal	\$7-\$25	Increased 5%-10%
Provincial Park Entrance Fee	\$9-\$17	Increased 0%-5%

Visitation in 2008 has dropped, not because of an influence by prices, but as a result of a host of other factors which include: the decline in the economy, high Canadian dollar, increased border security and documentation requirements, unusually inclement weather conditions and high gasoline prices in 2008.

D. ACCESSIBILITY

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

D1. 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 a 3-hour drive time is substantial.	✓		
iii.	Drive time from the nearest U.S. border crossing or international airport is less than 2 hours.	✓		
iv.	Flight time from the international to the nearest regional airport is less than 1 hour.			✓
v.	Drive time from that regional airport is less than 1 hour.			✓

The travel time to the nearest major urban market is less than three hours. Using Cobourg as a base the Greater Toronto area is the closet and largest urban area (5.3 million) with an estimated drive time of 1 hour, or 95 kms to the eastern edge of the city. The city of Kingston is an estimated 1 hour and 47 minutes with a population of 152,358. Peterborough County is estimated as a 50 minute drive and has a population of 116,570.

The population within a 3 hour drive is substantial at 7.3 million. Southern Ontario, being the most populated region in Canada and being in such close proximity to upstate New York and Michigan, provides a much larger market to target for tourism.

The drive time to the nearest US border crossing (Thousand Island Bridge) is an estimated 2 hour drive from Cobourg. Other US border crossings are just slightly over a two hour drive.

There is no regional airport within Northumberland County. The closet regional airport is located in Peterborough, with an estimated drive time of 50 minutes. The Toronto International Airport is an approximately 1 hour and 30 minute drive from Northumberland.

D2 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, <u>or</u> 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. In recent years Highway 401 has been updated and now has three lanes in both directions all the way to the town of Cobourg. The road surface is well maintained and signage is displayed well. The direction is very easily followed as the 401 only runs east and west. Traffic usually flows very well in both directions minus normal delays (i.e. rush hour and cottage country traffic on summer weekends). Also the toll route 407 is a fast and convenient way to get to the Rice Lake area, with a well-maintained road surface. With a driving tours publication and many ads published in Toronto magazines and newspapers, Northumberland Tourism does market the short drive from Toronto to the county as being “only an hour east”.

D3. 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 the 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 Northumberland County can be done by vehicle, train, bus or by private boat. Highway 401, ETR 407, Highway 2, Regional Road 9, and Highway 7 are other connecting routes to Northumberland.

Via Rail has a train stop in Cobourg, which is one of the busiest small-town train stations. Via runs many daily trips to urban centers such as Toronto, Ottawa, Kingston, Montreal and Quebec City. The stretch between Windsor and Quebec City accounts for 85% of Via Rail Canada’s total business.

Greyhound coaches run regular service to Northumberland with a bus stop located at 2211 County Road 28 and Highway 401 in Port Hope. Cobourg, Brighton, and Colborne do have stops, however they have limited service. Also Coach Canada has buses running within Northumberland County, mostly going to the Toronto International Airport, although they do run buses from Hastings to other nearby cities and towns. Cobourg and Port Hope both have public transit systems, with regular scheduled service between the two towns.

Network Brighton, a partnership of seven community groups, has launched a free hourly weekend bus service to bring campers from Presqu’île Provincial Park into downtown Brighton. Each trip is guided by a community member who points out Brighton’s attractions.

Being located on the waters of Lake Ontario, Northumberland County offers dockage for private vessels and tour boats. Cruise ships can access Lake Ontario however no harbour within the county has a depth deep enough to accommodate cruise ships. Private vessels and tour boats can navigate the Trent-Severn Waterway locking system which receives over 100,000 boats per year.

The following is a list of the 23 marinas and 1401 seasonal and transient boat slips available throughout the county:

Location	Marinas	Seasonal Slips	Transient Slips
Lake Ontario	7	477	104
Rice Lake	14	895	106
Trent River	2	29	26
Total	23	1401	236

The transient marina slip dockage is located in or close to downtown areas and attractions. Lake Ontario marinas in Cobourg and Port Hope are within easy walking distance from the downtown core. The Cobourg marina sits in the heart of the town with an attractive harbour and beach. Shopping, dining, and other amenities can be easily accessed from Cobourg marina. Port Hope's marina is within easy walking distance to the historic downtown. Shopping, dining, and amenities are also located close to this marina.

Brighton marinas are located close to Presqu'île Provincial Park which is a major tourism attraction in the county, although it is not within an easy walking distance from downtown Brighton. Some marina businesses have partnered with the Brighton BIA to provide taxi vouchers to marina guests or other forms of transportation.

Rice Lake and the Trent River marinas have numerous villages and towns along the waterway. Campbellford and Hastings located on the waterways both have marinas and dockage located within walking distance to the downtown core. Both towns have attractive, comfortable spaces and are accessible to local services, amenities, and attractions.

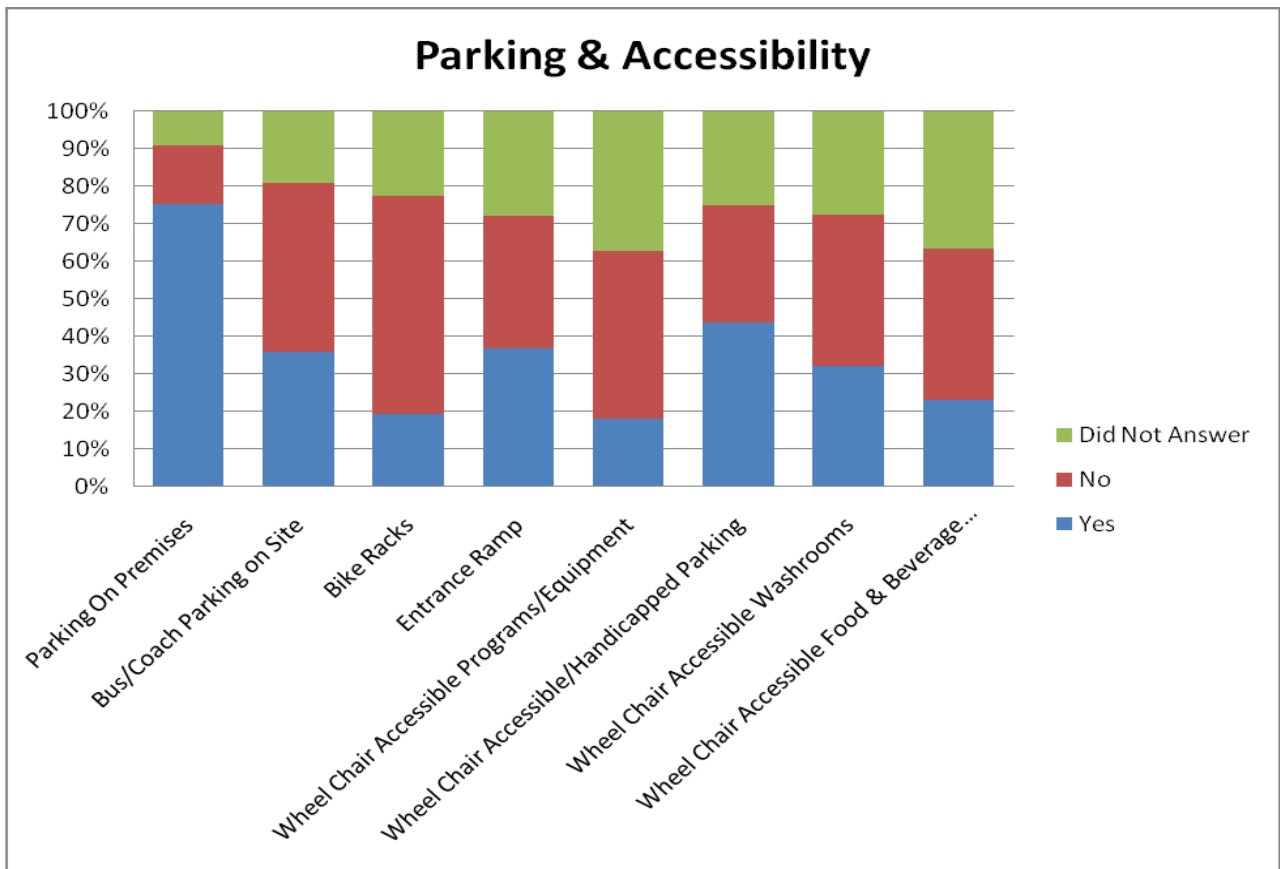
Bewdley has marinas that are located right in town. Dining, groceries, and other amenities are within a short walking distance. Gores Landing and Harwood are both smaller villages which are also located along Rice Lake and have marinas, however not all amenities are within an easy walking distance. Their general stores are located in close proximity to the water and do offer some groceries and LCBO/Beer Store service.

D4 The destination is investing in making access to it and its attractions attractive and visitor friendly.

	Measure	Yes	Almost	No
i.	The Transportation Resources Checklist has been completed.	✓		
ii.	A minimum of 9 “Yes” have been recorded [a minimum of 6 “Yes” are required for an “Almost”].		✓	

Northumberland County has a total of 8 “Yes” and is considered to be “almost” accessible for tourists in terms of transportation options.

Although not specifically referenced in the PRTD guidelines and criteria, accessibility for disabled persons is also an important factor to consider in determining whether a destination is attractive and visitor friendly. Under the **THE ACCESSIBILITY FOR ONTARIANS WITH DISABILITIES ACT**, Ontario is making the province accessible by 2025 through accessibility standards. These standards are the mandatory rules that businesses and organizations will have to follow.



Source: Northumberland PRTD Survey, 2009

E. ACCOMMODATIONS BASE

This section measures and assess the breadth and depth of Northumberland’s offering in terms of the range of accommodation classes available, the range of locations available, and the presence of higher-end operators. The evaluation characterizes Northumberland’s accommodations base.

E1. 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 relative 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 Northumberland County have the option of 1270 rooms and 2006 campsites at a variety of price ranges within close proximity to core attractions and on theme activities. Accommodation categories range from full-service hotel/inns and bed and breakfasts, to “roughing it” campsites, with traditional hotels, motels, and rental cottages in between.

Class	No. of Properties	No. of Rooms	Price Range
RV Parks & Campsites	26	2006 (sites)	\$25-\$50/night
Cottages	49	582 Cabins (with -5 bedrooms)	\$200-\$1000 /weekend \$600-\$1500 /week Avg. \$800/week
Bed & Breakfast	39	108	\$65-\$180/night
Eco-Lodge	1	6	\$160/night
Resort Lodge/Hotel	0	0	0
Motel - Independent	8	62	\$75-\$125 /night
Motel - Chain	0	0	0
Hotel – Independent (more than 20 rooms)	7	148	\$85-\$200 /night
Hotel/Inn – Independent (more than 6 less than 20)	19	164	\$65-\$350/night
Hotel – Chain	3	200	\$95-\$105 /night
TOTAL	152	1270 Rooms + 2006 Sites	

Source: PRTD Survey/Resource Audit 2009

The following properties are within close proximity of core attractors:

Property	Distance to Core Attraction (km)
Best Western Cobourg	Northumberland Mall & YMCA (.25 km)
Woodlawn Inn Cobourg	Downtown Cobourg Heritage District (.25 km)
Dr. Corbett's Inn Port Hope	Located in Port Hope Heritage District
Golden Beach Resort	On Rice Lake

There are 3 branded, or widely known hotels, and 4 higher end accommodation providers within the region:

Branded

- Best Western Inn
- Comfort Inn (2 locations: Port Hope & Cobourg)

Higher End

- Woodlawn Inn (Ontario's Finest Inns)
- Ste. Anne's Country Inn & Spa
- Dr. Corbett's Inn
- The Hillcrest B & B

Meeting/Reception Facilities

A variety of meeting facility types were found while completing the Resource Audit. Hotels, community halls, golf courses, theatres and conference centres are available for social, or business gatherings throughout the Northumberland Region. 18 meeting facilities can accommodate over 150 people, including 2 convention centres which have the capacity for more than 200, however, there is insufficient capacity for large convention opportunities. There are 11 small-scale facilities which can hold up to 150 guests. This list is available on the Northumberland Tourism website or in brochure form to those interested.

PERFORMANCE

The Performance measures identify the extent to which Northumberland is successful and recognized in the marketplace. By comparing Northumberland’s performance attributes in terms of hard data, conclusions can be determined as to its actual performance against its primary competitors, and in a competitive marketplace context. Visitation statistics, accommodation occupancy levels, and critical acclaim are all industry standards to measure performance.

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

- Visitation
- Occupancy and Yield
- Critical Acclaim

F. VISITATION

This section assesses Northumberland’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 times of year. The evaluation identifies Northumberland’s absolute and relative visitation performance.

F1. 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 total VFR/Pleasure motivated travel by residents of Ontario.			✓
iii.	The destination attracts a significant portion of its visits from markets beyond Ontario’s borders.			✓
iv.	The destination’s <u>share</u> of visits by <u>all</u> 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 included activities relying on the destination’s core attractions classes is significant.			✓
viii.	The destination’s share of the visits identified above are significant in comparison to competitive destinations in Ontario.			✓

Data used in this section, unless otherwise stated, is from Statistics Canada's Canadian Travel Survey and International Travel Survey (CTS/ITS). 2007 is the most recent year for which official statistical information about visitation is available in Canada

In 2007, Northumberland attracted 1,330,000 guests, 813,000 on day visits, 517,000 staying overnight. The source for these estimates is (TSRC) Travel Survey of Residents of Canada (TSRC/ITS 2007)

In 2007, destination visitation captured 1.6% of the total 43,377,000 (#) VFR/Pleasure motivated trips taken by Ontario residents. Its share of those trips was 1.6%; its share of overnight visits was 1.5%.

Duration of stay	Person visits to Northumberland County	% breakdown of visits
Overnight	517,000	39%
Same day	813,000	61%
Total	1,330,000	100%

In the year 2007, overnight guests from the following origin markets identified below accounted for the following proportions of Northumberland's overnight visitation:

Overnight visits	Person visits to Northumberland County	% breakdown of visits
From other provinces	22,000	4.3%
From the U.S.	46,000	8.9%
From other international markets	14,000	2.7%
From Ontario	435,000	84.1%
Total	517,000	100%

In the year 2007, same day visitors from the following origin markets identified below accounted for the following proportions of Northumberland's same day visits:

Same day visits	Person visits to Northumberland County	% breakdown of visits
From other provinces	2,000	0.02%
From the U.S.	21,000	2.6%
From other international markets	3,000	0.04%
From Ontario	787,000	96.8%
Total	813,000	100%

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

Also in 2007, destination visits by guests from the following origin markets accounted for the identified share of out-of-province visitation to Ontario:

- 0.5% of the total 4,853,000 trips to Ontario by guests from other provinces
- 0.44% of the total 15,063,000 trips to Ontario by guests from the United States.
- 0.77% of the total 2,195,000 trips to Ontario by other international guests

Northumberlands share of meetings and conventions motivated travel to Ontario is not significant. In the year 2007, the region attracted 58,000 meeting and convention motivated trips, or 0.8% of the total meetings and convention motivated trips to Ontario.

The total visitation for same day guests to Northumberland was 61% and overnight visitors accounted for the remaining 39%.

Northumberland destination visitation in 2007 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 Northumberland	Northumberland % Share of Trips
Fishing	4,902,000	59,000	1.20%
Boating	6,483,000	71,000	1.10%
Historic Sites	4,526,000	59,000	1.30%
Festivals/Fairs	2,200,000	66,000	3.00%
Provincial/Nature Parks	5,039,000	30,000	0.60%
Museums/Art Galleries	3,735,000	34,000	0.91%

Overnight Visits to Northumberland County as a percentage of total Overnight Ontario Visits with Specific Activity:

Activity on Overnight Visits	All Ontario - Overnight Visits (000's)	Northumberland (CD114)	City of Kawartha Lakes (CD16)	Frontenac (CD10)	Peterborough County (CD15)	Durham Regional Municipality (CD18)	Hastings County (CD12)
Visit Friends/Relatives	19,150	1.46%	0.83%	2.97%	2.30%	3.06%	2.01%
Festivals/Fairs	1,932	1.40%	2.36%	5.45%	2.49%	1.46%	0.68%
Cultural Performances	3,162	1.34%	0.95%	3.11%	1.81%	0.79%	0.62%
Museums/Art Galleries	3,382	0.93%	0.20%	3.55%	1.66%	1.03%	0.76%
Zoos/Aquariums	1,133	0.98%	0.20%	3.67%	4.73%	2.26%	0.93%
Sports Events	1,875	1.00%	1.10%	3.70%	1.24%	2.60%	1.21%
Shopping	5,446	0.84%	0.21%	2.90%	0.93%	1.74%	0.73%
Sightseeing	4,338	0.60%	0.20%	2.89%	0.80%	1.16%	0.76%
Bars/Nightclubs	1,873	0.32%	0.08%	3.05%	0.64%	1.16%	0.47%
Casinos	2,323	0.28%	0.22%	1.57%	0.54%	1.35%	0.28%
Theme Parks	1,250	0.26%	0.41%	3.45%	1.02%	2.66%	1.20%
Natl/Prov. Nature Parks	4,779	0.57%	1.00%	2.49%	1.63%	0.74%	1.53%
Historic Sites	4,284	1.26%	0.31%	5.64%	1.53%	1.25%	0.90%
Any Outdoor/Sports Activity	14,972	1.12%	3.05%	3.01%	4.18%	1.35%	3.02%
Boating	6,035	1.05%	5.51%	4.00%	5.49%	1.08%	2.97%
Golfing	1,600	1.02%	3.16%	2.05%	2.05%	1.84%	2.30%
Fishing	4,195	1.14%	3.88%	3.13%	5.78%	0.47%	5.03%
Hunting	234	0.00%	0.87%	1.42%	1.69%	0.00%	8.71%
Downhill Skiing/Snowboarding	897	1.07%	1.24%	2.70%	4.03%	0.23%	4.38%

The destination's share of the visits identified above is not significantly higher in comparison to competitive destinations in Ontario. In 2007, the shares identified above compare favourably to the shares held by other competitive destinations.

F2. 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 Adventures
- Young Go-Gos
- Retired Roamers

F3. 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 distributed as follows:

Q1	Q2	Q3	Q4
18%	27%	28%	27%

G. OCCUPANCY AND YIELD

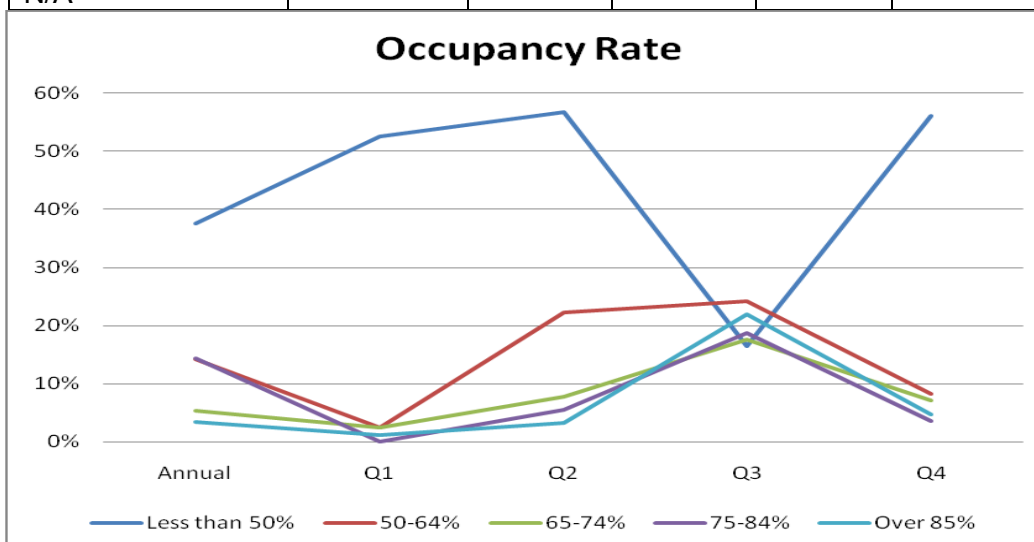
This section assesses Northumberland’s market performance in terms of accommodation occupancy and guest expenditure levels. The evaluation compared occupancy and expenditure performance against industry and provincial averages.

G1. The commercial accommodations base has occupancy rates in excess of 65%.

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

Accommodation occupancy rates in Northumberland County are not spread evenly throughout the year. During the winter season there is a significant drop in accommodation attendance according to Premier-Ranked Tourist Destination survey results which captured 2008 occupancy rates. It is important to note that 45% of accommodation respondents operate on a seasonal basis from May to October. Results shown below are based on those industry members who participated in the survey.

Occupancy in 2008	Annual %	Q1	Q2	Q3	Q4
Under 50%	38%	53%	57%	16%	56%
50-64%	14%	3%	22%	24%	8%
65-74%	5%	3%	8%	18%	7%
75-84%	14%	0%	6%	19%	4%
Over 85%	4%	1%	3%	22%	5%
Blank answer or N/A	25%	41%	4%	1%	20%



Source: PRTD Survey 2009

G2. 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.			✓
iii.	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 2007, the average expenditure per capita for guests on day trips in the region was just over half (\$84.00) the provinces average of \$165.00. The average expenditure per capita for overnight visitors was \$146.00, compared to the \$298.00 average for Ontario.

While expenditures per capita for both day trip and overnight visitors to Northumberland are below the provincial average, this is not a characteristic unique to Northumberland. 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 lack of conference and convention facilities and visitors in these areas compared to large urban centres 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 in Northumberland County in 2007 equaled to \$111,797,000. In comparison the total spending for Ontario by all day trip guests was \$17,299,625,000. The destination's share of total spending by these tourists was 0.6%. Total spending by overnight guests equaled \$75,538,000, whereas the total spending by all tourists on overnight trips in the province was \$12,829,287,000.

H. CRITICAL ACCLAIM

This section addresses the extent to which Northumberland is recognized as a must-see destination, has a profile that contributes to the attractiveness of Ontario and Canada as a destination, and, is a “top-ranked” place to visit. The evaluation identifies if Northumberland is recognized as standing out from its competitors.

H1. 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 at the near or 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 see. Depending on their point of origin there may be various places guests would visit before coming to Northumberland County. If guests have specific interests the destination does offer unique experiences such as:

- Attending a classical music performance presented at Westben Arts Festival Theatre
- Bird watching at the annual Waterfowl Festival at Presqu’ile Provincial Park,
- Fly fishing for brown trout in the Ganaraska River or
- Making maple taffy in the snow at the Warkworth Maple Syrup Festival

In terms of being at the top of the list when compared to other destinations it can be safely said that the destination offers a variety of experiences that would compare favourably to other areas in the province. This is especially true when considering the amount of water based and outdoor recreation activities available, as well as numerous annual events and festivals.

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

- Presqu’ile Provincial Park, Brighton
- Canadian Firefighters Museum, Port Hope
- Capitol Theatre, Port Hope
- Ganaraska Forest
- Barnum House Museum, Grafton
- St. Anne’s Country Inn and Spa, Grafton
- Main Street Port Hope – “Antique Capital of Ontario”
- Proctor House Museum, Brighton
- Apple Route, Port Hope to Trenton
- Westben Arts Festival Theatre, Campbellford

H2. 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.			✓

Although images of the rolling hills, small town experiences and rural landscapes of Northumberland have been used in a number of Ontario Tourism promotions such as OTMPC Great Fall Drives brochure, as well as Ontario Parks brochures, Reader's Digest and others, it does not play a significant role in the branding or marketing of Ontario or Canada.

H3. 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.	✓		

Several of Northumberland's core or supporting attractors have been identified as "best in class" or "top tier". Research during the course of the project has revealed a number of examples:

Attraction/Location	Details/Date
Cobourg Winter Festival	➤ 2008 Achievement Award for the province's best new festival or event. One of the top 100 festivals and events for 2009/2010.
Cobourg Beach	➤ Ontario's Prettiest Town Beach – Toronto Star 2008.
Smith's Creek Antiques, Port Hope	➤ Canadian Geographic's list of the Ten Best Antique Shops in Canada, 2009.
Port Hope	➤ 2008 Lieutenant Governor's Ontario Heritage Award for Community Leadership. The award recognizes communities for exemplary leadership in heritage conservation and promotion. ➤ Walton Street, named Ontario's best preserved main street by TVOntario, 2002.
The Woodlawn Inn, Cobourg	➤ Recognized in "Where to Eat in Canada".
The Gables, Brighton	➤ Recognized in "Where to Eat in Canada".
St. Anne's Country Inn and Spa	➤ Best Country Escape Spa – Travel to Wellness Canada 2009 ➤ Voted top spa in Canada and Best Spa for Visiting Solo in Canada by SpaFinder Readers' Choice 2009.
Cobourg	➤ Has won Provincial and Federal awards for "Communities in Bloom" 1996.
Warkworth Western Weekend/Rodeo Days	➤ Biggest and Best Rodeo in Eastern Ontario, voted Dodge Rodeo Tour's Rodeo of the Year for 2008.

Other products or experiences in Northumberland have also been ranked as “best in class,” or otherwise recommended.

Attraction/Location	Details/Date
Oak Heights Winery	1st place – red ribbon 2007 Oak Heights Winery Vidal Blanc (Other white varietal) at The Royal Agricultural Winter Fair 2008 Champions of The Royal Wine Competition
Church Key Brewery	3 Gold Medals, 2004 Canadian Brewing Awards 1 Gold Medal, 2003 Canadian Brewing Awards
Sandy Flat Sugar Bush	4 Time World Champion Maple Syrup Producers
Empire Cheese & Butter Co-op	Grand Champion Royal Winter Fair 2008 Grand Champion British Empire Cheese Show
Elemental Embrace Wellness Spa	Elemental Embrace received 2 of the 11 Awards of Excellence presented by MPP Carol Mitchell and the Honorable Peter Fonseca, Minister of Tourism, at the annual Ontario's Finest Spas "WOW Awards" ceremony in April 2008. Of the 11 awards available to the 35 member spas in Ontario, Elemental Embrace received the awards for excellence of 'treatment' and 'treatment rooms'. Furthermore, Elemental Embrace scored within the top 3 spas of Ontario's Overall Finest Spas.
Northumberland Rolling Hills and Driving Tours	The scenic drives and rolling hills receives much attention and many features in news publications and travel websites from urban areas. Toronto Star, Toronto Sun, Ottawa Citizen, Canada.com, Toronto Life, National Post, Canadian Geographic Traveler, and Great Fall Drives from distinctive getaways.ca.
Fishing Rice Lake	Outdoor Canada ranked in number 2 of best Largemouth Bass location, featured on many T.V shows and publications such as Bob Izumi (the longest running fishing show in Canada), WFN – World Fishing Network, Fishing Canada, and Ontario Out of Doors.
Fishing in Northumberland	Lake Ontario, The Ganaraska River and the Trent River all have critical acclaim of their own from Lake Ontario ranked 4 th on the list of 25 hotspots for Salmon from Outdoor Canada to the TSW as being one of the most fished systems in southern Ontario according to the Ministry of Natural Resources (MNR).

FUTURITY

The FUTURITY elements, criteria and measures identify the extent to which the destination is investing in its future as a place with viable and continuing attractiveness to evolving markets.

I. DESTINATION MARKETING

The Destination Marketing criteria and measures identify the extent to which Northumberland 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. This section identifies 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.

11. 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 Northumberland County, 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 type of offerings:

Activity	Motivated Trips
All Water based Outdoor Activities	33%
Festival & Fairs	28%
All Winter Outdoor Activities	16%
A public campground in a nature park	11%
Visited national, provincial parks	11%
Fresh Water Fishing	10 %
Swimming in Lakes	9%
Hiking- same day excursion while on overnight trip	5%
Lakeside / riverside resort	7%
Hiking-same day excursion while on overnight trip.	5 %
Motor Boating	4 %

There is definitely a market demand for Northumberland's type of offering, and the demand is stable and growing. This demand trend can be illustrated by looking at three activities that are high on the list of visitors to Northumberland:

Cycling

Cycling is growing in popularity as an outdoor recreational activity, not only for its health benefits but also as an alternative mode of sustainable transportation, with significant environmental benefits.

Over the last two years, 10.1% (2,494,384) of adult Canadians went cycling while on an out-of-town, overnight trip of one or more nights. Cycling was the tenth most common outdoor activity pursued by Canadian Pleasure Travelers during that time. Recreational cycling as a sameday excursion (8.3%) was the most popular cycling activity followed by mountain biking (3.0%) and overnight touring (1.0%). Of those who went cycling, 28.4% (708,979) reported that this activity was the main reason for taking at least one trip (Canadian Travel Market – "Cycling While on Trips of One or More Nights, a Profile Report", October 23, 2007).

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%). 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 (Canadian Travel Market – "Swimming and Boating While on Trips of One or More Nights, A Profile Report," October 18, 2007).

Fishing

Over the last two years, 17.6% (4,351,708) of adult Canadians went fishing while on an out-of-town, overnight trip of one or more nights. Fishing was the fifth most common outdoor activity undertaken by Canadian Pleasure Travelers. Fresh-water fishing (15.3%) on trips was more common than ice fishing (3.9%), salt-water fishing (3.1%) or trophy fishing (0.5%). Among those who fished on trips, almost one-half (48.6%, or 2,115,688 adult Canadians) reported that fishing was the main reason for taking at least one trip. Fishing was the outdoor activity cited fifth most often as the main reason for taking a trip (Canadian Travel Market – "Fishing While on Trips of One or More Nights - A Profile Report," October 15, 2007).

In terms of direct expenditures, resident anglers spent over \$1.6 billion on recreational fishing. Three quarters of these expenditures were spent on food, lodging, and transportation costs. Less than 10% of the direct expenditures were for actual fishing supplies.

Survey of Recreational Fishing in Canada

	Ontario	Quebec	Other Province (Total)	Canada
Package Deals	22,044	47,622	55,486	125,152
Food and Lodging	\$187,648	\$118,551	\$209,436	\$515,638
Transportation	\$237,574	\$142,147	\$314,797	\$694,519
Fishing Services	\$42,255	\$33,249	\$37,077	\$112,582
Fishing Supplies	\$50,013	\$35,710	\$59,324	\$145,048
Other	\$1,137	\$1,614	\$5,418	\$8,169
Total	\$540,671	\$378,894	\$681,544	\$1,601,108
Expenditure per angler	\$707	\$577	\$564	\$652

*In Thousands of dollars

Source: Fisheries and Oceans Canada, "Survey of Recreational Fishing" Statistics Canada, Environment Accounts and Statistics Division 2005.

12. 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 Northumberland County with a focus on the local destination vs. a larger travel region. Northumberland Tourism is the primary DMO for the county as a whole, and is responsible for the external marketing of Northumberland County as a tourism destination.

Additionally, (with the exception of Alnwick-Haldimand and Hamilton Townships) all of the various municipalities within Northumberland County also have organizations in place to perform DMO functions; Cobourg Tourism, Port Hope Tourism, Cramahe Tourism, Trent Hills Chamber of Commerce, the Brighton Chamber of Commerce, Rice Lake Tourist Association and AppleRoute Tourism all perform destination marketing activities largely related to their own specific areas, or attractions. Local DBIA's (such as Cobourg DBIA) also partner with and/or perform tourism services and marketing roles in their respective communities.

These organizations all produce visitor publications and have websites detailing the tourism experiences as well as servicing visitors in the geographic areas and municipal borders of their respective destinations. It should be noted that there is a certain degree of overlap and duplication of efforts amongst these various DMO's in promoting and marketing of the destination and attractions. An example of such duplication includes travel guides and print advertising.

The primary DMO (Northumberland Tourism) 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 and travel trade show and events. Furthermore, there are not sufficient human resources to implement a marketing plan.

Communications represent approximately 43.6% (\$178,750) of Northumberland Tourism’s total annual operating budget. The DMO is effective with the resources it has, and utilizes a variety of marketing tactics to attract visitation. In a fiercely competitive tourism marketplace, these efforts are limited in comparison to other competitive tourist destinations which have more resources at their disposal.

Other DMO’s within Northumberland have their own budgets and apportion a percentage towards communications and marketing. It could be stated that, collectively, county-wide DMO’s spend just under \$400,000 annually to market the destination, but, as noted earlier, this amount could be utilized more effectively to eliminate duplication and overlap.

DMO	2009 Annual *Communications Dollars
Northumberland	\$178,750
Trent Hills	\$32,595
Port Hope	\$55,000
Cobourg	\$57,500
Brighton	\$35,000
Cramahe	\$29,242
Alnwick-Haldimand	Not Known
Hamilton	Not Known
Total	\$388,087

Note:
*Communications includes such items as print and electronic media (e.g. printed publications, internet, toll-free telephone lines etc.), as well as consumer and trade show promotion, advertising and publication distribution costs.

Northumberland Tourism 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 monitor and track consumer inquiries (telephone, walk-in and e-mail), website traffic and keyword searches for specific information, and conducts quarterly web analytics to monitor consumer interest and demand.

A number of municipalities’ DMO’s (Cobourg, Port Hope and Trent Hills) have summer students conduct their own surveys at visitor centres, however the information collected to track travel motivation and monitor campaign effectiveness on visitors is of limited utility due to small sample size, and survey questions are not consistent or detailed enough amongst DMO’s.

Some DMO’s have partnered with events or other organizations (i.e. Downtown Business Improvement Areas -DBIA’s) to survey attendees, as well as monitoring phone calls and inquiries, and website traffic increases during marketing campaigns.

The following are examples of tracking the influence of marketing on visitors:

How did you hear about event?	Cobourg Harvest Festival (2007)	Downtown Sidewalk Sale (2006)
Event Posters	11.5%	10.1%
Radio	10.4%	20.1%
Print	31.3%	27.4%
Internet	7.3%	1.1%
Word of Mouth	39.6%	36.3%
Television	0.0%	5.0%

Cobourg Tourism 2006-2007.

13. 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 “Yes’s” has been recorded. [A minimum of 7 “Yes’s” is required for an “Almost.”]			✓

In 2008, Brotherhood Tours, a local receptive tour operator, took 15 group tours to Northumberland County. They visited a wide variety of businesses and attractions during day trips to the destination. Average group size was 30-50 per tour.

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

14. 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.	✓		

Northumberland Tourism has an Annual Budget and Business and Implementation Plan. Its key goals are “...to position Northumberland County as a viable four-season tourism destination, through promotion and integrated marketing strategies aimed at motivating consumer visits and spending throughout the year. This will be undertaken in a spirit of cooperation to create an environment for the development of the County’s tourism industry.”

The key objective of the implementation plan is: “our commitment (is) to provide leadership in the overall economic well being of tourism within Northumberland”.²

15. 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 destination development and marketing strategy focusing on growth in visitation and/or yield has been developed and is being implemented, and is contained in Northumberland Tourism’s 2009 Business Plan and Budget. There is, however, no overall long-term strategy currently in place for destination development, nor is there a mechanism in place to identify and measure goals.

Northumberland Tourism in conjunction with the other municipal DMO’s has a number of initiatives on the table which are being developed, or being considered for development such as Culinary Tourism and the Bike Train/Cycling initiative, but these are not currently market ready.

16. 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 recognized customer service training program in place at the key experience/activity providers (i.e. individual businesses), nor are there currently any programs for the service community in general. No region wide training programs are in place on a regular basis. Most training programs are in-house. Some training such as SuperHost/Hospitality Excellence training programs are occasionally offered by the local Chambers of Commerce and annually by Northumberland Tourism (through Getaway Country) but participation by employees of tourism businesses has been limited.

² Northumberland Tourism, “Business Plan and Budget,” 2009.

J. PRODUCT RENEWAL

This section measures and assess the extent to which Northumberland County is making capital investments in its attractiveness into the future. The evaluation documents the status and magnitude of Northumberland’s investment in the future.

J1. Re-investment and new investment is occurring to enhance, revitalize or develop facilities relevant to the quality of the tourist experience.

	Measure	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 5 years, 70% of the businesses who participated in the survey indicated that they have invested capital in their business to improve or expand their facilities. 74% of respondents indicated making investments within the past 2 years. The most significant financial contributions were in the Accommodations (\$16.2 million), Attractions (\$4.8 million) and Parks and Trails (\$4.2 million) sectors. The reported investment totaled \$34.9 million. A significant portion of that investment, an estimated 66 %, has occurred within the past 2 years.

A further 37.5% of survey respondents indicated that they planned to modify or expand their operation in the next three (3) years. Core attractions have demonstrated an ongoing commitment to reinvesting in programming and other improvements in order to enhance the visitor experience.

Examples of such reinvestment made within the last five years include:

Location	Investment (\$)
(New) Ganaraska Forest Centre	\$4,000,000
Cameco Capitol Arts Centre	\$3,000,000
Ranney Suspension Bridge	\$475,000
Rotary Waterfront Park Ice Rink & Bubbler Fountain – Cobourg	\$1,517,000
Marsh Boardwalk - Brighton	\$325,000

The Ganaraska Forest Centre has been part of the community since 1976, with its buildings having stood on the grounds since the early 1960's. After many years of use, redevelopment of the facility was necessary. The redevelopment will allow Ganaraska Regional Conservation Area to continue providing the existing programs to visitors.

The Ganaraska Forest Centre is a learning facility, located in the Ganaraska Forest, which thousands of students and guests of all ages visit to experience the great outdoors and gain education about environmental conservation. Construction began in May 2008, and the redeveloped centre, which opened in September of 2009, will be a multi-use facility for outdoor education programs, community and corporate group rentals and special events, along with being the new home of the Oak Ridges Moraine Information Centre.

Examples of other investments/improvements are:

- Town of Cobourg spent \$1.3 million on park improvements between 2002 and 2004 with \$50,000 spent on band shell improvement in 2005
- The Federal Government has earmarked \$83 Million to be spent on maintenance and improvements to the Trent-Severn Waterway
- Investments in fishing infrastructure have been made by re-stocking Atlantic Salmon in Cobourg Creek

J2. 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.	Investment and/or reinvestment is being made in developing or revitalizing underdeveloped or underperforming assets.		✓	

Through the Resource Audit survey results and consultation with tourism industry leaders, it has become very clear that Northumberland has underdeveloped and underperforming assets. Examples of underdeveloped assets include:

- Proposed Port Hope Central Pier & Waterfront Vision – A redeveloped central pier area with attractions and retail space would enhance Port Hope's waterfront area.
- Proposed Brighton Waterfront Master Plan - The waterfront plan would recreate park areas at Harbour and Ontario streets, the Harbour Street parkette, Presqu'île landing marina and the Gosport area. Improvements to the four waterfront locations would include new signage, gazebos, masonry work and improved landscaping. Gosport would see the most dramatic changes with a promenade of small scale retail and residential, public washrooms, a splash pad and staging area for concerts and festivals. A trail system would link the waterfront parks to Presqu'île Park.

- Proposed Hastings Revitalization – downtown and waterfront design enhancements will make the Village of Hastings more appealing to both residents and visitors.
- Trent Severn Waterway System – Currently underutilized, a revitalized waterway system could bring more waterborne visitors to the northern and eastern parts of the county. Locking stations are also an attraction for travelers by land.
- Crowe Bridge Conservation Area - Currently closed, the park could provide additional outdoor recreational opportunities (a core attractor) to this part of the Trent Hills community.
- Northumberland County Forest – Currently undeveloped and underutilized, could provide additional outdoor recreational opportunities (a core attractor).
- Proposed Conference Centre – A conference centre could provide opportunities for meetings and conventions by organizations from outside of Northumberland.
- Proposed Cobourg Multi-Use Community Centre - Highlights of the community centre design include twin, NHL-size ice pads; a double gymnasium; an indoor running track; multi-purpose program and meeting space; and dedicated space for child-minding, seniors and youth. The facility could provide more sports tourism opportunities.
- Sports Tourism – Opportunities exist to promote and capitalize on tourism generated through various sporting events and tournaments held by various organizations.
- Historic Sites – Identified sites of historic significance (see appendix G) could be further promoted, visitor experiences enhanced and resources improved to enable year-round operation of seasonal attractions.
- Culinary Tourism – Opportunities exist to further advance tourism by highlighting locally grown or produced food and beverage items or culinary experiences.
- Cobourg Marina - Development of West Harbor by dredging and expansion of the number of boat slips could help increase the number and size of boats and their passengers visiting Cobourg.
- Arts & Culture Cluster – Expansion and development of the many festivals, shows and exhibits so they are market ready for tourists could help brand Northumberland as an arts and culture destination.

- Bicycle Road Routes and Trails Network – An enhanced network of bicycle routes and trails will be essential if Northumberland is to capitalize on the proposed Via Rail Bike Train initiative.

- Local Heritage Museums and Attractions:
 - i) Firefighter’s Museum – Port Hope (Existing)
 - ii) Memory Junction Railway Museum – Brighton (Existing)
 - iii) Memorial Military Museum – Campbellford (Existing)
 - iv) Sifton-Cook Heritage Centre – “the Barracks” – Cobourg (Proposed)
 - v) Proposed Harwood Railway Museum – Harwood (Proposed)

K. MANAGING WITHIN CARRYING CAPACITIES

This section measures and assesses the extent to which Northumberland is aware of, and manages 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 Northumberland's ability to manage the system that sustains it and its attractiveness to the tourism marketplace.

K1. 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 equitably across municipal boundaries.		✓	

Economic Benefits

Tourism brought an estimated \$151,856,000 in economic benefits to Northumberland County in 2007 according to Travel Survey Residents of Canada (TSRC) and the International Travel Survey (ITS). This included \$69,001,000 in direct, indirect and induced contributions to GDP, \$41,415,000 in labour income and salaries, and \$3,789,000 in municipal taxes. 1309 direct, indirect and induced jobs were created in the tourism industry. Guest visits and expenditures definitely make a net positive contribution to the local economy.

“Tourism also plays a very important role in the local economy. The same proximity to major urban centres that helps the manufacturing sector also adds greatly to the potential for visits from urbanites looking for a small town escape. Hundreds of thousands of visitors attend Cobourg's major annual festivals and are also attracted by the beautiful Lake Ontario waterfront and the quaintness of the shops and restaurants in the historic downtown. Cobourg boasts a number of top notch bed and breakfasts, inns and hotels and has positioned itself as a leading wellness centre with many spas offering everything from acupuncture to massage to yoga”.³

“Tourism is a clean industry and is already a strength in Port Hope. It is a growth industry - especially if viewed as marketing to the Greater Golden Horseshoe area and pass-by traffic on the 401. Tourism growth can be a strong, added boost to industrial development since visitors who become familiar with the Municipality's assets may relocate their businesses to the Municipality and tourism can attract owner-entrepreneurs”.⁴

³ “Cobourg Business Retention and Expansion Plan Project,” 2009.

⁴ The Municipality of Port Hope, “An Economic Development Strategic Plan,” 2006.

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

		Impacts retained in CD 14	Impacts that accrue to other parts of Ontario	Total impacts of CD 14's visitor spending in Ontario
		[A]	[B]	[A+B]
GDP (Gross Domestic Product) (\$ 000s)	Direct	49,881	4,277	54,158
	Indirect	8,755	8,672	17,427
	Induced	10,364	7,698	18,062
	Total	69,001	20,646	89,647
Wages and Salaries (\$ 000s)	Direct	29,264	2,890	32,154
	Indirect	5,875	5,708	11,583
	Induced	6,278	4,927	11,205
	Total	41,415	13,525	54,940
Number of Jobs	Direct	1,066	76	1,142
	Indirect	122	114	236
	Induced	121	102	223
	Total	1,309	292	1,601
Taxes (\$ 000s)	Direct	30,429	1,893	32,322
	Indirect	6,222	3,687	9,909
	Induced	4,788	3,328	8,116
	Total	41,440	8,908	50,348
	Federal	21,080	4,558	25,638
	Provincial	16,570	3,406	19,976
	Local	3,789	944	4,733

Source: Ontario Ministry of Tourism, Regional Tourism Profiles - Northumberland County, 2007.

Though it cannot be disputed that tourism benefits the entire destination, it also cannot be stated with any degree of certainty that those benefits and costs are balanced equitably across all of Northumberland's municipal boundaries.

While the county markets Northumberland as a distinct destination, geography, history and political divisions and boundaries of the 7 municipalities that make up Northumberland have proven to be a challenge to this strategy.

Because of historical settlement patterns, the majority of the county's population and economic activity is concentrated in the south along the shore of Lake Ontario in the communities of Port Hope, Cobourg and Brighton. The central part of the county is largely rural and agricultural.

The northern and eastern areas of the county, namely Rice Lake and the Lower Trent River area have tourism infrastructure in place, but much of it tends to be seasonal. While it could be said that benefits from tourism are spread throughout the region, those benefits may fluctuate in certain areas with the season.

Increased Visitation and Local Resources

K2. Visitation 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. Because the housing market is so small, relative to other areas, reliable data is difficult to obtain. While Northumberland's real estate prices have gone up over time, prices are still reasonable compared to other areas in Ontario.

Although real estate prices are increasing over the long term, prices are relatively steady to slightly declining in the short term. The current economic recession has had an effect on housing prices, as in many areas there is a glut of inventory causing a buyer's market, which will likely cause prices to fall in the short term.

This follows the trend in other parts of the country. According to the Canadian Real Estate Association, sales of existing homes fell by 17.1% across the country in 2008 and are expected to tumble another 16.9% in 2009. The association says resale home prices fell by an average of 9.6% across the country in February 2009 compared to February 2008.

- Cobourg has made the top 25 on the list of "Canada's Best Places to Live" as compiled by Moneysense magazine, coming in at Number 22.
- "The hills of Northumberland County have yet to succumb to sprawl but are still little more than an hour from the CN Tower. And although the area has been "discovered" by urban refugees, real estate remains a relative bargain. "If all you know are Caledon prices to the west of Toronto", confides one local realtor, "you'll be pleasantly surprised when you look east. You can save perhaps 15 to 20 percent."⁵
- Statistics Canada's Community Profile for Northumberland 2006 indicated that the average house price for an owned dwelling was \$233,072, below the Provincial average of \$297,479.

⁵ Harrowsmith Country Life, "What Price Homestead? Northumberland Hills," pg 30, 2005.

With the exception of some anecdotal examples, 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.

Trained Skilled Labour

K3. 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 58% or 272 businesses feel that there is a sufficient pool of labour to support their staffing requirements to accommodate current and projected levels of visitation. However, 15%, or 72 businesses felt that there is not enough trained labour, and 27%, or 129 businesses did not respond to the survey question.

"Current employment levels, labour and labour needs, recruitment, skills training and mentoring opportunities were examined....A positive outlook for the labour force is supported by business' ability to retain employees (82%). At the same time, employers are stating that they cannot find the right people with the right skills at the right time. While employee attraction has challenges, the manufacturing sector has had great success in maintaining a stable workforce through the retention of its employees with 91% of respondents reporting no difficulties. The tourism sector also reported a favourable response with 74% having no difficulties associated with the retention of its employees".⁶

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."

⁶ "Cobourg's Business Retention and Expansion Plan Project," 2007.

In order to service the tourism industry in larger centers like Cobourg, local business owners (i.e. accommodations/restaurants) have indicated that the lack of public transportation is a barrier to attracting a ready and willing labour force of young workers that often live in outlying or rural areas. There is often a high turn-over in the hospitality sector, due to the lower pay and seasonal nature of the work.

The aging workforce and out-migration of Northumberland youth in search of jobs, education and adventure is an obstacle to be overcome for businesses concerned about succession planning for the future. Census Canada reported that 26% of 15-19 year olds and 10% of 20-24 year olds left Northumberland between 2001 and 2006.

Noteworthy characteristics of the Northumberland labour force include:

- Lower participation and employment rates, and slightly higher unemployment rates than Ontario;
- A higher percentage of its population with less than a university education than the Ontario population;
- Proportionately more people are employed in the occupations of: sales and service; trades, transport and equipment operators; and occupations unique to primary industry (agriculture) and processing, manufacturing and utilities.

Where labour pool constraints are occurring, a plan to resolve the problem is being implemented. For instance, The Workforce Development Board (WDB) has conducted stakeholder consultations to identify trends and opportunities in the labour market that impact the workforce in Northumberland. The WDB goal is to establish local partnerships to work on initiatives to address labour market concerns.

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 20% of the respondents do currently conduct surveys of some kind, they are typically for their own internal use and reluctant to share their findings with others in the industry.

Some municipalities do conduct surveys during some of the larger festivals and events, but the information that is collected is of limited use due to low sample size, and the questions asked typically do not address customer service and satisfaction issues. Northumberland Tourism is aware of this situation, and will be taking steps to address this gap in information.

Environmental Monitoring

K4. 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.

For instance, The Haliburton, Kawartha, Pine Ridge District Health Unit (HKPR) provides weekly testing of beaches during the summer to ensure safe swimming conditions for swimmers. If unacceptable levels of bacteria such as E. coli are detected, the beach will be posted as unsafe for swimming, and retested the following week.

Port Hope council recently approved an agreement allowing Health Canada to set up an environmental monitoring station at Port Hope's Marsh Street Water Treatment Plant, which will measure environmental radioactivity levels close to the station.

Others organizations with environmental monitoring programs in place include:

- Ontario Ministry of Natural Resources
- Ontario Ministry of the Environment
- Environment Canada
- Nature Conservancy of Canada (Rice Lake Plains)
- Lower Trent Region Conservation Authority
- Ganaraska Region Conservation Authority
- Oak Ridges Moraine Foundation

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.

Overcrowding, overuse, diminished quality of the environment or diminished qualities of guest experience are not being raised as issues by guest surveys or by managers of facilities and resources. If thresholds are being exceeded, they are noted in the following areas, at the following periods:

Area	Issue	Period
Northumberland County Forest	Soil erosion/trail degradation by motorized vehicles	Ongoing
Rice lake and the Trent-Severn Waterway	Seasonal Flooding	Spring
Rice lake and the Trent-Severn Waterway	Invasive Species/Overfishing	Ongoing

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:

- March, April and May are critical months as melting snow and rain fill waterway lakes. Both heavy rainfall and prolonged warm temperatures will cause rivers and lakes to rise suddenly. The historical record shows this often results in more than one peak during spring freshet. Efforts to control this flooding are hampered by narrow channels, insufficient storage capacities in some lakes and the differing abilities of soils throughout the drainage basins to absorb water. While flood mitigation is a primary spring-time concern of waterway staff, care is also taken to ensure that water flows and levels are adequate to protect fish spawning sites and for use in the following summer.
- Northumberland County, in consultation with various user groups and community stakeholders is in the process of developing a Forest Usage Master Plan to conserve the forest for future users, and to mitigate further damage to sensitive eco-systems and erosion to forest trails by motorized vehicles.
- Cobourg Creek Watershed is being rehabilitated. Four water quality monitoring programs have been carried out to monitor water quality conditions across the Cobourg Creek watershed area by Ganaraska Region Conservation Authority.
- The Ontario Ministry of Natural Resources, is monitoring invasive species such as the round goby. The round goby became established in the Great Lakes after being discharged from the ballast water of ocean-going vessels. First discovered in the St. Clair River in the late 1980s, this invasive species is now found in all five Great Lakes as well as two inland locations – on both sides of the dam in Hastings on the Trent Severn Waterway near Peterborough and in the Pefferlaw River south of Highway 48 near Sutton. The high numbers of round goby in Lake St. Clair, Lake Erie and much of Lake Ontario are affecting native species and the biodiversity of those lakes. The ministry and the federation are working with other partners to monitor populations of round goby at the inland locations where they have been found.

- To ensure the health and viability of fish stocks for the future, The Ontario Ministry of Natural Resources is currently consulting with various stakeholders concerning a proposed Fisheries Management Plan for Fisheries Management Zone 17 (FMZ17) which includes rules related to catch limits and seasons.

FMZ 17 is the smallest management zone in the province, consisting of the Kawartha Lakes, Trent and Crowe River watersheds, and the rivers and streams of the eastern portion of the Oak Ridges Moraine. According to the 2005 Ontario Recreational Angling Survey, the lakes and rivers of Fisheries Management Zone 17 are the second most fished areas in the province, exceeded only by the Great Lakes.

Current regulations for sunfish in FMZ 17 include an open season from the 4th Saturday in April to November 15th, with no restrictions on the size or number of sunfish that can be harvested. The current regulation with no catch limits or size restrictions affords no protection to large sunfish.

Many anglers from the United States travel to FMZ 17 specifically to fish these species, and the sunfish tourism industry generates millions of dollars in revenue for local businesses and municipalities. The strength of this tourism industry is based on the quality of sunfish as a sportfish and the numbers of sunfish available to anglers. The number of anglers fishing for sunfish varies from lake to lake. Sunfish angling effort on Rice Lake is close to five times greater than the next highest lake (Pigeon Lake). The majority of anglers targeting sunfish in FMZ 17 are from the United States⁷.

K5. Growth in visitation to the destination is not threatening the experience enjoyed by current visitors.

	Measure	Yes	Almost	No
i.	Overcrowding, overuse, diminished quality of the environment or diminished quality of the guest experience are not being raised as issues by guests 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.

⁷ Ontario Ministry of Natural Resources, “Proposed sunfish management in FMZ 17 Fish and Wildlife Branch,” 2009.

Some examples of overcrowding during peak weekend are below:

Area	Issue	Period
Victoria Park/Cobourg Beach, Cobourg	Overcrowding, garbage, parking issues	Summer months/during Waterfront Festival
Maple Syrup Festival, Warkworth	Parking issues/Traffic congestion in town	March
Campbellford Bridge	Traffic congestion	Year Round/Certain Times of Day

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:

- Downtown parking is an issue during the Cobourg Waterfront Festival. Free shuttle busses to and from parking areas are provided every 20 minutes during the festival. There is no municipal parking on the east side of Victoria Park. A parking advisory committee is in place, and meets monthly. A Downtown Parking Study has been produced.
- To address traffic congestion issues on the Campbellford Bridge, the need for a second bridge has been proposed and an environmental assessment is being studied.
- To address parking issues at both the town and Sandy Flats Sugar Bush, free shuttle busses are provided during the Warkworth Maple Syrup Festival.



The bus to Sandy Flat Sugar Bush during the 2009 Warkworth Maple Syrup Festival

Infrastructure

K6. 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.	✓		
iii.	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, as documented in:	✓		

Water and Sewage Treatment

There is current/planned water treatment and delivery capacity and sewage treatment and trunk capacity to accommodate current and projected levels of visitation. This is documented in municipal Official Plans:

“The existing water and sewage infrastructure is sufficient to meet the town’s projected growth; however it is noted that there will be a need for certain key improvements including increases in the capacity of the sewage treatment facilities and expansion of water storage facilities”.⁸

Cobourg’s Water Treatment Plant serves both the Town of Cobourg and some areas of Hamilton Township. In 2008 Cobourg incurred the following expenses for maintenance and upgrades to its drinking water delivery infrastructure:

Ongoing annual watermain replacement: Burnham, James, Havelock & Albert	\$947,144
Ongoing hydrant work: New construction & replacement	\$107,817
Installation of additional new standby generator at WTP	\$479,091
Upgrades and maintenance of two water towers	\$212,851
WTP Upgrades	\$20,000
Water Meters	\$38,867
Total	\$1,805,770

Note: In rural areas water capacity is provided by wells. The servicing and maintenance of wells is the responsibility of the property owner. It is also the responsibility of businesses to financially meet the requirements in order meet the required capacities.

⁸ “Cobourg Official Plan – Basis of the Plan Part 1.5,” 2002.

- “In order to plan for anticipated growth and to avoid limitations on development due to servicing constraints, the Municipality shall monitor on an annual basis, the performance of the water and sewage treatment plants to determine the reserve capacity of each. Council shall not approve proposed development if adequate uncommitted reserve hydraulic capacity is not available at the sewage and/or water treatment plant. In implementing this policy, reference to the Ministry of the Environment and Energy's "Guideline for Calculating and Reporting on Uncommitted Reserve Capacity at Sewage and Water Treatment Plants" is preferable”.⁹

6.3 WATER AND SEWER STRATEGIES

Each of the three urban centres, Campbellford, Hastings and Warkworth, is serviced with municipal sanitary sewerage facilities and municipal water supply systems. There is sufficient capacity within each of these systems to accommodate the growth expected within the time frame of this Plan. Development in the rural areas will generally take place on individual water supply and sanitary sewage disposal facilities. Communal water and sanitary sewage disposal systems will be considered on a site-specific basis.

Source: Trent Hills, “Official Plan,” Page 57, 2000.

3.3 Sanitary Sewer and Water Servicing

Portions of the Township are serviced with Municipal water systems. The Settlement Area of Baltimore and portions of Camborne are serviced with water systems that are owned and operated by the Township of Hamilton while areas on County Road 45 and areas east of Ontario Street are serviced with Municipal water extensions from the Town of Cobourg. There are no Municipal sanitary sewer systems within the Township.

- 3.3.1 There is capacity in the Baltimore water system to accommodate new residences and associated commercial activity. Therefore, Baltimore will continue to develop on a limited basis with Municipal water and private sewage disposal systems. In this regard only small scale development in Baltimore will take place in accordance with the severance policies of this plan. Development by plan of subdivision will only be permitted following the preparation of a Secondary Plan for the area which will address such issues as sustainability of existing systems, impact of additional septic effluent on groundwater resources, the cost effectiveness and need to service lots large enough to have a septic system and the justification for growth on the basis of two levels of servicing. A long term servicing strategy will be completed as part of the Secondary Plan. Council will carefully monitor the effect of partial municipal services on the natural environment to determine the need for a municipal sewage treatment system to service the Baltimore area.

Source: Township of Hamilton, “Official Plan,” Page 8, 2003.

⁹ Port Hope, “Official Plan, Section C12.1, Servicing,” 2006.

Roads, Transit, Parking and Trails

There is current/planned road, transit, parking and trail capacity to accommodate current and projected levels of visitation. The primary east-west transportation corridor through Northumberland County is Highway 401. With the exception of weekday commuter traffic and weekend cottager traffic, local traffic congestion is not a generally a concern for residents of Northumberland County.

- Occasionally, accidents and weather force the closure of sections of Highway 401. Three new detour routes have been identified for road rehabilitation in order to handle the traffic rerouting and to ease congestion on Highway 2 from Colborne to Cobourg during such occurrences. The total project is expected to cost \$5.474-million.
- Northumberland County Transportation & Waste Department is responsible for 503 kilometres of Road, 110 structures and two patrol yards. This covers an area of 188,149 hectares of predominately rural countryside with five urban centres. The County has a complement of 15 tandem trucks that are used in maintaining Northumberland's road system to meet the requirements of providing a well maintained transportation system.
- \$11,262,583 in road and bridge maintenance and improvement projects have been approved and are underway for 2009.
- A new east/west road extension is planned to serve the needs of a new housing development in West Cobourg.
- The Bridge Street bridge over the Trent River in the community of Campbellford provides a vital east-west link for through and local vehicular traffic, and pedestrian travel. The bridge is the only high level, public road crossing of the Trent River within Campbellford, and has a relatively short lifespan remaining, and traffic congestion occurs on a daily basis. Northumberland County and the Municipality of Trent Hills are conducting a study to identify the transportation system improvements that are required to address existing and future roadway capacity deficiencies, improve mobility for the local community, enhance the provision of emergency services, and plan for the time when the existing bridge requires replacement.

The recommendations of the study to date are to make improvements to the Bridge Street traffic signals as an interim measure, and in the future, to construct a new high level bridge in the corridor between Alma Street on the west side of the Trent River and Second Street on the east side of the Trent River.

- A building and land has been purchased by the County to relocate and expand Emergency Medical Services in Cobourg.
- Northumberland's public transit system consists of VIA Rail, which provides service in and out of Northumberland County at Cobourg, and Cobourg Transit and Port Hope Transit both of which provide local bus service within those two communities. Some smaller rural communities do not have public transportation systems, but are serviced by taxis and limited scheduled bus service such as Coach Canada and Greyhound.

- Northumberland County is hoping to participate in the Bike Train's newly proposed Eastern Ontario route with two stops in Cobourg between June and October. The Bike Train Initiative introduces bike racks onboard select passenger Via Rail trains to destinations across Ontario, making cycling holidays easy and accessible. The Ontario East Bike Train pilot route is being developed to connect communities along Lake Ontario's waterfront and the St. Lawrence Seaway. Once patrons disembark the Bike Train in Cobourg, two routes will be at their disposal: The signed Waterfront Trail with dedicated lanes and the 87km Rice Lake Ramble looped route suggested by the Ganarska Freewheelers Bicycle Club.
- Cobourg council recently approved a \$1.3 million reconstruction project for Ontario Street between Highway 401 and Elgin Street. When completed in early fall 2009, cyclists will enjoy dedicated bike lanes on both sides of Ontario Street.
- Assessments of the environmental effects of infrastructure expansions have been completed, with effects considered manageable and acceptable.

Political Will

K7. 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.	✓		
iii.	There are sufficient administrative resources in place to efficiently manage review, approvals and permit processes.			✓

Where present local, municipal and upper 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 expressed in Official Plans and other strategic planning documents.

The following objectives and policies are outlined in the Northumberland County's, "Service Mission Statement":

"Our commitment is to provide leadership in the overall economic well being of tourism within Northumberland. Our goal is to position Northumberland County as a viable four-season tourism destination, through promotion and integrated marketing strategies aimed at motivating consumer visits and spending throughout the year. This will be undertaken in a spirit of cooperation to create an environment for the development of the County's tourism industry".¹⁰

¹⁰ "Northumberland Business Plan," 2009.

“The tourism sector of Northumberland County is extremely important to the local economy. Although secondary data sources such as the census do not specifically provide data on the tourism sector, one part of it i.e. accommodation, food and beverage services employed 2,195 people in 2001. It should be pointed out, however, that this figure underestimates overall tourism employment as many people employed in retail and other services are likely to be engaged in tourism related activities”.¹¹

Local Level:

- Port Hope - It is recommended that every effort should be made to focus commercial and tourism development in the downtown core¹²
- Alnwick/Haldimand - The Plan recognizes tourism and agriculture as two significant components of the economic base for the township, with the former expected to grow in importance over the term of the plan¹³.
- Brighton - Tourism is also recognized as a significant industry with Lake Ontario and Presqu'île Provincial Park located at the southern end of the municipality¹⁴.
- Strategy #1: Tourism
We will dramatically increase tourism in the municipality with the following critical choices:
 1. Develop a plan to increase available accommodations for visitors
 2. Develop an integrated marketing approach
 3. Enhance & schedule our current events in coordination with other stakeholders
 4. Create and re-vitalize new & existing attractions¹⁵
- Cobourg – “To foster opportunities for tourism, through a variety of mechanisms which enhance the community for residents as well visitors.”¹⁶
- Trent Hills - The Plan promotes downtown areas as distinctive and attractive locations for retail, office, institutional, tourism and civic purposes. The Plan also recognizes the Trent Severn Corridor as a significant tourism element¹⁷.
- Hamilton Township - The Plan states that there will be a strong tourist demand in the future for the agriculture, natural, historical and cultural attractions of the Township. The protection and enhancement of the area’s natural historical and cultural attractions will be the focus of the Township’s successful tourism strategy. Rice Lake and the Lake Ontario shoreline will be a major element in the recreation linkage of the Township¹⁸

¹¹ Northumberland County, “Navigating our Future Prosperity - Economic Development Strategy,” 2005-2010.

¹² Port Hope, “Growth Management Strategy,” 2002.

¹³ Alnwick/Haldimand, “Official Plan,” 2007.

¹⁴ Brighton, “Official Plan, 1985.

¹⁵ Municipality of Brighton, “Strategic Plan,” 2008.

¹⁶ Cobourg, “Official Plan, Part 2.5 (iv),” 2002.

¹⁷ Trent Hills, “Official Plan,” 2000.

¹⁸ Hamilton Township, “Official Plan,” 2003.

It is unknown definitively whether there are sufficient administrative resources in place to efficiently manage review, approvals and permit processes. However, there appears to be sufficient administrative resources in place to efficiently manage review, approvals and permit processes in the various municipalities throughout Northumberland. Discussions with several municipal planning departments/representatives during the resource audit did not reveal any significant shortcomings, but this could not be confirmed.

The following chart illustrates the number of building permits (both residential and commercial) issued by each municipality between January and May for the past two years. 21.7% fewer permits were issued in 2009 when compared to the same time period in 2008, and the total estimated value of those projects was 48.3% less in 2009 when compared to 2008.

Building permits	Jan-May 2009	Value (\$million)	Jan-May 2008	Value (\$million)
Cobourg	53	\$12.3	113	\$13.8
Port Hope	132	\$9.2	136	\$7.7
Alnwick/Haldimand	24	\$7.4	42	\$6.2
Hamilton	44	\$3.6	40	\$3.2
Cramahe	37	\$1.2	39	\$3.1
Trent Hills	93	\$5.7	87	\$8.7
Brighton	63	\$5.3	86	\$23.6
Total	446	\$44.7	543	\$66.3

Source : Northumberland PRTD Research

INTERPRETATION – SUMMARY OF FINDINGS

At the outset of the report a measurement criteria developed by the Ontario Ministry of Tourism was described that rates the destination's status related to the evaluation for its Product, Performance and Futurity dimensions. After completing the Destination Performance Summary using the data provided through industry surveys and supplementary information and research it has been determined that the destination is lacking in a number of fundamental areas.

Product - A Tourist Destination provides a high quality tourist experience, enabled through the destination's offerings of:

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

Northumberland's Rating:

Almost (D)- the affirmation can almost be made and supported – one to several key efforts / investments will enable affirmation

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

- Visitation
- Occupancy and Yield
- Critical Acclaim

Northumberland's Rating:

No (O)- the affirmation cannot be made or supported – there are not enough key efforts / investments to affirm otherwise.

Futurity - Ability for a destination to thrive from tourism into the future is sustained by:

- Destination Marketing
- Product Renewal
- Managing within Carrying Capacities

Northumberland's Rating:

Almost (D)- the affirmation can almost be made and supported – one to several key efforts / investments will enable affirmation

Positive affirmations cannot be made for all three measurement criteria. Northumberland County however has potential to continue through tourism development as a competitive tourism destination. Northumberland Economic Development and Tourism, Tourism organizations and industry partners should be encouraged that the PRTD work has been completed and it has revealed both opportunities and gaps in the tourism offering.

The gaps are both narrow and wide and therefore the process offers many tangible strategies that can improve the status of the destination once implemented. It supports the premise that Northumberland County has the opportunity to develop and increase its overall market share as a top tourist destination in the near future. There appears to be a willingness among tourism stakeholders to understand the recommendations coming from the PRTD process and take steps to improve both collectively and individually.

NEXT STEPS - CONCLUSIONS

The following chart summarizes Northumberland’s PRTD findings, observations and associated recommendations which were the outcome of the resource audit, and discussions with Northumberland’s Community Champions during two PRTD consultant facilitated stakeholder validation sessions.

Northumberland County Premier-Ranked Tourist Destination Project	
Summary of Findings/Observations and Recommendations	
Findings & Observations	Recommendations (Note: In no particular order of priority)
<ul style="list-style-type: none"> • A formal Tourism Destination Development strategy is not in place. 	<ul style="list-style-type: none"> ➤ Develop a 3 year Tourism Development Strategy that is based on the PRTD recommendations, and that defines the scope, and prioritizes the deliverables. ➤ Implement a Tourism Development Plan. ➤ It will rally the tourism industry / municipalities. ➤ Northumberland Tourism Advisory Committee assumes accountability for implementation. ➤ Introduce the creation of a Rice Lake Tourism Renewal Strategy as part of long-term destination development.
<ul style="list-style-type: none"> • Role of tourism organizations (County, Municipalities, BIA’s, and Chambers of Commerce) not clear and need to be better defined. • An opportunity exists to enhance the “better together” philosophy within Northumberland County. 	<p>Clarify who does what and establish a unified, “Better Together” approach:</p> <ul style="list-style-type: none"> ➤ Initiate dialogue between all organizations that have tourism as part of their mandate. ➤ Northumberland Tourism should continue to lead destination marketing, they are the recognized DMO. ➤ Clearly identify who does what – for marketing, product development, industry relations, visitor services etc. ➤ Identify roles of DMO’s, Chambers, BIA’s, and Economic Development Depts. ➤ Develop a strategy to grow financial/human resources to better serve and market the destination.
<ul style="list-style-type: none"> • The industry would benefit from collective training in areas of customer service, market readiness, tourism packaging and web development. 	<ul style="list-style-type: none"> ➤ Implement customer service training - establish a <i>Culture of Hospitality Excellence</i>. ➤ Introduce an annual series of industry development initiatives, use Ministry expertise and modules (e.g. Workshops). ➤ Tourism Inc., Market Readiness, Tourism Keys.

<ul style="list-style-type: none"> • It is unknown if the destination delivers good service and value for money. 	<p>Industry to introduce an annual visitor survey to track visitor experiences:</p> <ul style="list-style-type: none"> ➤ Initiate winter 2009/10. ➤ Strategy developed by Implementation Task Team. ➤ Empower Chamber's, BIA's, and operators to help deliver.
<ul style="list-style-type: none"> • First quarter represents opportunities; a focused arts & culture offering with accommodations might help. 	<ul style="list-style-type: none"> ➤ Arts and culture offering is a priority for development and investment especially in shoulder seasons.
<ul style="list-style-type: none"> • A community approach to festival timing and planning would serve the industry well. 	<ul style="list-style-type: none"> ➤ Maximize the festivals & events calendar through collaboration.
<ul style="list-style-type: none"> • Day and overnight trip expenditures are below provincial average. • Visitation is dominated by day trips. • There may be potential to grow tourism revenues by expanding success in the area of sports tourism. 	<p>Increase tourism economic impact by:</p> <ul style="list-style-type: none"> ➤ Extending length of stay of all visitors ➤ Capitalizing better on the VFR market segment ➤ Establish a Sports Tourism Task Team to fully explore opportunities and gaps for this market segment
<ul style="list-style-type: none"> • Importance of tourism is not widely understood by influencers and general public 	<ul style="list-style-type: none"> ➤ Establish a series of strategies designed to increase tourism awareness within the County.
<ul style="list-style-type: none"> • No clear brand exists, one that differentiates and positions the destination. • Several sub-brands within the county may confuse the consumer. 	<ul style="list-style-type: none"> ➤ Establish a Northumberland County brand, one that differentiates the destination. ➤ Leverage the collective appeal of attractors and "<i>connect the dots</i>" to clearly position the destination and increase visitation.
<ul style="list-style-type: none"> • Capacity exists mid-week in all seasons – a focused review of business opportunities may be warranted (e.g. Conferences & Meetings). 	<ul style="list-style-type: none"> ➤ Explore the opportunities associated with the Meeting & Conference market. ➤ Understand the market readiness issues.
<ul style="list-style-type: none"> • Underperforming and underdeveloped assets exist –This is a good thing! 	<p>Address underdeveloped and underperforming assets and develop specific strategies to fully leverage these assets over the long-term:</p> <ul style="list-style-type: none"> ➤ Prioritize the list – what will generate the greatest long-term impact ➤ Arts and culture offering is a priority for development and investment <p>Known Underdeveloped / Underperforming Assets:</p> <ol style="list-style-type: none"> 1. Signed bike routes 2. Port Hope Central Pier & Waterfront Vision 3. Brighton Waterfront Master Plan 4. Hastings Revitalization – Downtown and Waterfront 5. Trent Severn Waterway System

	<ol style="list-style-type: none"> 6. Crowe Bridge Conservation Area 7. Northumberland County Forest 8. Historic Sites – Fire Fighter Museum, Memorial Military Museum, Memory Junction, Harwood Railway Museum, Sifton-Cook Heritage Centre (the “Barracks”) 9. Culinary Tourism 10. Cobourg Marina – Development of West Harbor
<ul style="list-style-type: none"> • The lack of public modes of transportation within the county makes it difficult to move visitors unless they have their own vehicle. 	<ul style="list-style-type: none"> ➤ No specific recommendations made at this time. ➤ Determine significance of issue during implementation phase and develop appropriate corrective strategies where possible.
<ul style="list-style-type: none"> • Accommodation base is limited with few branded properties. 	<ul style="list-style-type: none"> ➤ No specific recommendations made at this time. ➤ Determine significance of issue during implementation phase and develop appropriate corrective strategies where possible.

Appendix A

Transportation Resources Checklist

Attribute	Yes	No
1 The destination has at least one easily accessed Visitor Information Centre, on a major transportation route. with clear and frequent directional signage	<input type="checkbox"/>	<input checked="" type="checkbox"/>
2 Major tourist transportation routes to downtown(s) have frequent directional signage, well-maintained road surfaces, and attractively maintained public spaces.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
3 Transportation routes to major attractions have frequent directional signage, well-maintained road surfaces, 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 type="checkbox"/>	<input checked="" type="checkbox"/>
7 Taxi drivers have been given service delivery training, 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		Yes	No
Attribute			
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 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 type="checkbox"/>	<input checked="" type="checkbox"/>
	b. their interest in packaging travel experiences within the destination area;	<input type="checkbox"/>	<input checked="" type="checkbox"/>
	c. their perceptions of opportunities to improve the visitor experience and increase visitation to the area.	<input type="checkbox"/>	<input checked="" type="checkbox"/>
6.	A Local travel agent sits on a Workbook implementation committee	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Appendix C

Northumberland County Destination Performance Summary

PREMIER RANKED TOURIST DESTINATION

PRODUCT	PERFORMANCE	FUTURITY																																																																																																
A. Distinctive Core Attractions	F. Visitation	I. Destination Marketing																																																																																																
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B. Quality and Critical Mass	G. Occupancy and Yield	J. Product Renewal																																																																																																
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LEGEND

Yes	●	Yes, the affirmation can be made and supported for the destination
Almost	▶	The affirmation can almost be made and supported – one to several key efforts / investments will enable affirmation
No	○	No, the affirmation cannot be made/supported for the destination
N/A or unknown	?	Performance against the measure cannot be determined.

Appendix D

Northumberland County Premier-ranked Tourist Destination Project – Research Report

Northumberland County Premier Ranked Tourist Destination - Resource Opportunity Matrix											
Legend:		●	Abundant								
		◐	Moderate								
		○	Limited								
		Blank	No Resource	OPPORTUNITIES							
TOURISM RESOURCE/OPPORTUNITY MATRIX			Count	Resource Opportunities	Core Attractions	Supporting Attractions	On-Theme Activities	Underdeveloped Assets	Group Travel?	Packaged	
TOURISM RESOURCES - BUILT/MANAGED											
Natural Resource Opportunities	Natural Parks and Sites	National	9	◐			◐	◐	◐		
		Provincial	3	●	◐	◐	◐	◐	◐		
		Crown Land	1	○			◐	◐			
		Conservation Areas	17	●		◐	◐	◐			
		Reserves	5	○		◐	◐	◐	◐		
		Interpretive Programs/Walks/Tours	4	○				◐		◐	◐
Cultural and Heritage Resource Opportunities	Historic Places and Sites	World Heritage Site	0								
		National Historic Site	3	○		◐	◐	◐	◐		
		Provincial Heritage Site	22	◐		◐					
		Local Heritage Site	42	●		◐	◐	◐			
		Aboriginal Heritage Site	2	○			◐	◐			
		Living History Site	0								
		Heritage Gardens	5	○		◐	◐	◐			
		Folklore Site	0								
		Architectural Heritage Site	386	●		◐	◐	◐			
		Cultural/Historic Landscape	4	◐		◐	◐	◐			
		Cultural/Historic Travel Corridor	2	○		◐	◐	◐			
		Interpretive Programs/Walks/Tours	4	○				◐			
		Archaeological Attractions	Public Digs	0							
			Shipwreck Interpretive Tours/Dives	3	○				◐		
	Interpretive Programs/Walks/Tours		0								
	Cultural Attractions	Aboriginal Pow Wows/Celebrations	2	○				◐	◐		
		Archives	6	○							
		Annual Musical Festivals	7	◐		◐	◐	◐	◐	◐	
		Annual Non-Musical Festivals (2 days or more)	36	●		◐	◐	◐			
		Special Events & Celebrations (1 day only)	20	●		◐	◐				
Arts & Crafts Events		6	○				◐	◐			
Museums		10	○				◐	◐	◐		
Art Galleries & Artists Studios		41	●				◐	◐	◐	◐	
Large Scale Theatre	0										

Northumberland County Premier Ranked Tourist Destination - Resource Opportunity Matrix												
Legend:	●	Abundant	OPPORTUNITIES									
	◐	Moderate										
	○	Limited										
	Blank	No Resource										
TOURISM RESOURCE/OPPORTUNITY MATRIX			Count	Resource Opportunities	Core Attractions	Supporting Attractions	On-Theme Activities	Underdeveloped Assets	Group Travel?	Packaged		
		Studio/Garden/Architecture Tours / Walks-Events	10	◐			◐					
		Live Theatre - Performers	2	○								
		Live Theatre	5	◐		◐	◐	◐	◐	◐		
		Live Music - Performers										
		Live Music	16									
		Performing Arts Venues - Indoor	6	◐								
		Other Performing Arts Opportunities										
		Active Street Scenes	0									
Sports Venues/Events		Playing Field Complexes	14	○			◐	◐				
		Swimming/Diving Complexes	3	○				◐				
		Arena Complexes	9	○			◐	◐	◐			
		Community Hall										
		Equestrian Facilities	3									
		Major League Franchise Venues	0									
		Minor League Franchise Venues	0									
		Significant Sports Events Annual/Recurring Tournaments	6	○			◐	◐				
		Skydiving	0									
		Recreation Centre										
		Sport Club/Organization										
		Recreational / Resort Developments		Ski Development - Alpine	1							
				Ski Development - Cross Country	2	◐						
				Marina - Boating Developments	23	●	◐	◐	◐	◐		
Golf Courses	11			◐		◐	◐	◐		◐		
Attractions		Amusement/Theme Park - Outdoor	0									
		Amusement/Theme Park - Indoor	0									
		Commercial Events										
		Water Park/Wave Pool	0									
		Agricultural/Country Fairs	6									
		Horse Racing	0									
		Casino/Gaming	1	○				◐				
		Zoo/Game Farm/Animal Farm	2	○								
		Motor sports Venues	1	○					◐			

Northumberland County Premier Ranked Tourist Destination - Resource Opportunity Matrix										
Legend:	●	Abundant	OPPORTUNITIES							
	◐	Moderate								
	○	Limited								
	Blank	No Resource								
TOURISM RESOURCE/OPPORTUNITY MATRIX			Count	Resource Opportunities	Core Attractions	Supporting Attractions	On-Theme Activities	Underdeveloped Assets	Group Travel?	Packaged
Built Recreational/Commercial Infrastructure		Floral/Other Garden Attractions	6	○		◐	◐	◐		
		Farmer's Markets	5	◐		◐	◐			
		Farms / Orchards/Farm Gate/Garden Centre	61	●			◐	◐		
		Winery/Brewery	2	○		◐		◐		◐
	Commercial Venues	Retail - Specialty Shops	57	●		◐	◐			
		Factory Outlet/Shopping Mall	6	○					◐	
		High-End Shopping	39	◐		◐	◐			
		Antiques Shopping	48	●	◐	◐	◐			
		Arts & Crafts Shopping	13	◐			◐			
		Department Stores	19	◐						
		Spas & Day Spas	31	●			◐			
		Dining - Café	15							
		Dining - Fast Food	65	●						
		Dining - Mid-Price	182	●						◐
		Dining - High-End	8	○					◐	◐
		Banquet Hall								
		Pubs & Wine Bars	18	◐					◐	
		Entertainment	8	○						
		Night Life	0							
	Accommodations	Campground	28	●	◐		◐			◐
		RV Campgrounds	31	●	◐		◐			◐
		Cottage Court	49	●	◐		◐			◐
		Bed and Breakfast	39	●		◐	◐			◐
		Lodge	0							
		Resort Lodge	0							
		Eco-Lodge	1	○					◐	
		Condominium	0							
		Condo/Hotel	0							
		Vacation Rental	0							
		Spa - Accommodations	5	○		◐			◐	◐
		Motel/Inn - Independent	19	◐						
		Motel/Inn - Chain	0							
		Hotel - Independent	7	○					◐	
Hotel - Chain	3	○					◐	◐		
Hostel	0									
Conference/Convention Centre	2	○					◐	◐		
Mid-Scale Meetings Facilities (>150 persons)	16	◐					◐			

Northumberland County Premier Ranked Tourist Destination - Resource Opportunity Matrix											
Legend:	●	Abundant	OPPORTUNITIES								
	◐	Moderate									
	○	Limited									
	Blank	No Resource									
TOURISM RESOURCE/OPPORTUNITY MATRIX			Count	Resource Opportunities	Core Attractions	Supporting Attractions	On-Theme Activities	Underdeveloped Assets	Group Travel?	Packaged	
Transportation	Small-Scale Meetings Facilities (<150 persons)		11	◐				▼			
	Airport		0								
	Rail		1					▼	▼		
	Bus (Public)		2								
	Taxi		8								
	Car Rental		5								
	Limousine		3								
Other		1									
Other Tourism Resources		Chamber of Commerce	4								
		Travel Information Centres									
		Currency Exchange									
		Other Tourism Resources									
TOURISM RESOURCES - NATURAL											
Water-based Recreation Opportunities	Swimming	Beaches	15	◐		▼	▼	▼			
		Other Venues	5	○							
	Fishing	Sport fishing	24	●	▼	▼	▼		▼	▼	
		Icefishing	3	○		▼		▼			
	Boating	Sight Seeing Cruises - Day		2	○		▼	▼	▼	▼	▼
		Sight Seeing Cruises - Overnight		0							
		Sailing		3	○				▼		
		Power Boating/Touring		2	○						
		Board Sailing/Windsurfing		1	○						
		Sail/Power Boat Charters		0							
		Boat Launch Ramps		18	◐			▼			
		Water Skiing/Wakeboarding		2	○			▼			
		Canoeing/Kayaking - Flat-water		3	○			▼			
		Canoeing/Kayaking - Whitewater		0							
	Ice Boating		0								
Rafting		0									
Scuba Diving/Snorkeling		2	○								
Opportunities	Hunting	Big Game	1	○							
		Small Game	1	○							
		Water Fowl	1	○							
	Camping	Auto Touring	0								
		Bicycle Touring	0								
		Wilderness Trail	0								
Wilderness Canoe/Kayak		0									

Northumberland County Premier Ranked Tourist Destination - Resource Opportunity Matrix										
Legend:		●	Abundant							
		◐	Moderate							
		○	Limited							
		Blank	No Resource	OPPORTUNITIES						
TOURISM RESOURCE/OPPORTUNITY MATRIX			Count	Resource Opportunities	Core Attractions	Supporting Attractions	On-Theme Activities	Underdeveloped Assets	Group Travel?	Packaged
Land-based Recreation	Trails	Day Hiking	26	●	◁		◁		◁	
		Snowshoeing	19	◐		◁	◁			
		Cross Country Skiing	21	●	◁		◁	◁		
		Mountain Bike	17	◐		◁	◁			
		Road Bike Routes	5	◐		◁	◁	◁	◁	◁
		Equestrian Trails	8	◐		◁	◁			
		Snowmobile Trails	10	●	◁		◁		◁	◁
		All Terrain Vehicle Trails	3	◐					◁	
	Rock Climbing	0								
	Cave Exploring	0								
Land and Water-based Opportunities	Viewing Natural Attractions	6	○		◁	◁				
	Birdwatching	30	●	◁	◁	◁		◁		
	Waterfalls	2	○		◁	◁				
	Photography/Painting	1	○			◁		◁	◁	
	Travel Touring Corridors	Rail	1	○						
		Boat	4	●	◁		◁		◁	
	Car	2	◐	◁		◁		◁		
LEGEND:				●	Abundant					
				◐	Moderate					
				○	Limited					
				Blank=	No resource					

GLOSSARY OF TERMS & BASIC CONCEPTS AS DEFINED BY THE ONTARIO MINISTRY OF TOURISM

Core Activities: Tourists' activities as they interact with a destination's core attraction(s) to create core experiences.

Core Attraction: The feature(s), facility(ies), and/or experience which act as the primary motivators for most travel to the destination; the attractions with the most tourist visits in the destination. Core attractions can differ from season to season, as in for example golf vs. skiing at a four seasons resort destination. They can overlap or be distinctly different for differing visitor segments, e.g., viewing the Horseshoe Falls vs. gaming in Niagara Falls; or mass vs. niche segments, e.g., viewing the Falls vs. exploring battlefields from the War of 1812.

A core attraction can also be the product of an assemblage of assets all relating to a specific theme, e.g., forts and battlefields in the Niagara-Queenston area, stations on the Underground Railroad; or an experience enabled by an assemblage, e.g., a resort experience supported by fishing, canoeing, dining and accommodations resources, a rural get-away experience supported by country road and trail, shopping, dining, and B&B resources.

Core Experience: The guest's experience of the core attraction or the experience that is itself the core attraction. As classified by Pine and Gilmour*, the guest's interaction with the attraction occurs along two dimensions: the first capturing the degree of the guest's "absorption of" to "immersion in" the experience; the second capturing the degree of "passive" to "active" participation in the experience.

DMO: A Destination Marketing Organization - a generic term for any agency with a mandate to promote and develop tourism in a geographic area.

DMF: Destination Marketing Fee – a fee, levy or tax added to a hotel or other accommodator's bill to help fund the destination's marketing initiatives.

FIT: The Fully Independent Travel market - visitors making their own plans and travel arrangements.

High Quality Tourist Experience: A travel experience which exceeds the guest's expectations.**

HRDC: Human Resources Development Canada

Memorable Tourist Experience: A satisfying travel experience that lasts in the guest's memory, typically

* Pine, J. & Gilmour, J. 1999. *The Experience Economy: Work is Theatre & Every Business a Stage*. Boston: Harvard Business School Press.

** As expressed by S. Riley & J. Cunningham in their The Magic of Your Success presentation to the Tourism Federation of Ontario Conference, March 28, 2001.

because he or she was engaged in a deep and lasting (i.e., in an out-of-the-ordinary) manner by their experience of the destination. A high quality tourist experience will be memorable for all the right reasons.

Niche Segments: Smaller market segments with a travel-motivating interest in a particular type of experience, e.g., a specific interest in good boardsailing opportunities vs. the mass market interest in a more generic sun and sand destination.

On-Theme Activities: Activities (uses made of features or facilities) that are related to the core attraction or the core experience. For example, if the core attraction is Niagara Falls, on-theme activities could be: dining with a view of the Falls; a trip on the Maid of the Mist and walking the trails in the Niagara Gorge.

Determining whether an activity is on-theme or not is often more grey than black and white. For purposes of using this framework, activities can be considered “on-theme” when they offer a different way of experiencing the core attraction, derive some of their attractiveness from their physical or logical relationship with the core attraction, or are themselves an intrinsic part of the core experience.

OTMPC: Ontario Tourism Marketing Partnership Corporation- The partnership between the provincial government and the tourism industry responsible for marketing tourism in and to Ontario.

Product Positioning Statement: A brief description of what a product or service does, and its benefits using terms which set it apart from its competitors.

Receptive Tour Operator: A travel operator who specializes in packaging travel to the market area in which it is situated, for sale generally to visitors from other geographic market areas; an important resource in understanding market perceptions, needs and opportunities in a destination area.

Regional Complex: A term describing the situation in which individual tourism resources in an area are not sufficiently attractive to draw significant tourist visitation by themselves, but as a group attract visitation by virtue of complementing one another and creating a larger whole.

Supporting Attraction: Features or facilities that draw guests to the destination area by giving additional but secondary reasons to travel there. Supporting attractions can be primary travel motivators (i.e. core attractions) to some markets (typically niche segments). They are generally distinguished from core attractions by their smaller number of visitors.

Travel Agent: An individual or firm licensed under the Travel Industry Act to offer travel advice and bookings; an important resource in developing packaged travel opportunities in a destination area.

VFR: Visiting friends and relatives - an important motivator for tourism travel. It also highlights the importance of marketing to local and regional residents.

BASIC CONCEPTS

There are some fundamental concepts about tourism and successful tourism destinations that underpin the Premier-Ranked Framework. The following concepts are held as basic truths about tourism. They are reflected in the dimensions, elements, criteria and measures of the Premier-ranked Tourist Destinations Framework:

- Tourists travel to gain experiences that are not available at home, experiences which are therefore out-of-the-ordinary;
- Tourists' satisfaction with their experiences is shaped by their expectations for those experiences, which are different for each individual.
- The key to success in the tourism marketplace is to offer an out-of-the-ordinary experience "product" which exceeds those expectations.
- Tourism products exist only when they provide something so valued by potential visitors that they will actually travel to experience them.
- A destination's success in a competitive marketplace requires that it offers distinctive experiences tied to resources or programs unique to that destination, and delivered with high service quality. In so doing, it contributes to the development of sustainable competitive advantage through the creation of non-replicable assets - a fundamental business objective.
- Success over time in a context of evolving visitor expectations requires an ongoing commitment to understanding those expectations, re-investing to exceed them, and ensuring that the attractiveness and viability of core resources are maintained.
- The most successful destinations layer and cluster a wide variety of experiences on and around their core attractions, offering a variety of ways for a variety of market segments to experience them.

Appendix F

Northumberland County Premier-ranked Tourist Destination Project – Research Report

BIBLIOGRAPHY - Printed Materials

Document Title	Municipality/Organization	Date
Global Tourism Opportunities Research Study	Deloitte & Touche LLP	Feb-09
Cobourg Creek Watershed Plan	Ganaraska Conservation Authority	Nov-08
A Self Guided Historical Tour of Hamilton Township	Hamilton Township Heritage Committee	2005
Historical Plaques in Hamilton Township	Hamilton Township Heritage Committee	2005
Trent River Corridor Tributaries Subwatershed Report Card	Lower Trent Conservation	2007
Waterfront Development RFP	Municipality of Brighton	Aug-08
The Municipality of Brighton Strategic Plan	Municipality of Brighton	2008
The Municipality of Port Hope - Waterfront Master Plan	Municipality of Port Hope	May-08
The Municipality of Port Hope - Corporate Strategic Plan - "Together Forward"	Municipality of Port Hope	Jun-07
Port Hope Development Charges Update	Municipality of Port Hope	May-07
The Municipality of Port Hope - Water & Wastewater Rate Study Update	Municipality of Port Hope	May-07
The Municipality of Port Hope - Official Plan	Municipality of Port Hope	Sep-06
The Municipality of Port Hope - An Economic Development Strategic Plan	Municipality of Port Hope	Apr-06
The Municipality of Port Hope - Growth Management Strategy	Municipality of Port Hope	Jun-02
Northumberland County Growth Management Report	Northumberland County	Oct-08
A New Strategic Plan for Northumberland County 2008-2011 - Report from County Council Planning Session	Northumberland County	Apr-08
County of Northumberland Situation Analysis	Northumberland County	Apr-05
Northumberland County Agricultural Plan	Northumberland County	2008
Northumberland Website Community Profile	Northumberland County	2008
Northumberland County Fast Facts	Northumberland County	2007
Navigating Our Future Prosperity - Economic Development Strategy 2005-2010	Northumberland County	2005
Watershed Planning from Recommendations to Municipal Policies - A Guidance Document	Ogilvie, Ogilvie & Company, Consultants	Apr-05
Ontario Wayfinding Research Study	Oliver Wyman (Delta Organization & Leadership)	2009
Eastern Ontario Tourism Sector Study: Regional Summary	Ontario East Economic Development Commission	Sep-05
Growth Plan For The Greater Golden Horseshoe	Ontario Ministry of Public Infrastructure Renewal	2006

Regional Tourism Profile 2007	Ontario Ministry of Tourism	2007
Regional Tourism Profile 2006	Ontario Ministry of Tourism	2006
Presqu'ile Resource Management Plan - High Bluff and Gull Islands	Ontario Parks	Jan-09
Presqu'ile Resource Management Plan - Park Mainland	Ontario Parks	Jan-09
Peter's Woods - Preliminary Park Management Plan	Ontario Parks	Nov-07
Presqu'ile Provincial Park Management Plan Highlights	Ontario Parks	Nov-00
Presqu'ile Provincial Park Management Plan	Ontario Parks	Oct-00
Discovering Ontario - A Report On The Future Of Tourism	Ontario Tourism Competitiveness Study	Feb-09
Economic Impacts of 97 Festivals and Events	Ontario Trillium Foundation	Apr-03
Rural and Small Town Canada Analysis Bulletin	Statistics Canada	May-05
Ontario in the Creative Age	The Martin Prosperity Institute @ U of T Rotman School of Mgmt	Feb-09
Heritage Assessment of the Port Hope Central Pier	The Pier Group	Nov-08
Cobourg Multi-Use Community Centre (CCC) Draft Design Concept	Town of Cobourg	Apr-09
Cobourg Multi-Use Community Centre (CCC) Service Needs 2038: Approved Draft	Town of Cobourg	Mar-09
Cobourg Multi-Use Community Centre (CCC) Feasibility Study	Town of Cobourg	Jun-08
Cobourg Multi-Use Community Centre (CCC) Request For Proposal	Town of Cobourg	Jun-08
Town of Cobourg Business Retention & Expansion Plan	Town of Cobourg	Mar-08
Town of Cobourg - Employment Land Needs Study	Town of Cobourg	Feb-06
Cobourg Waterfront Festival Economic Impact Study	Town of Cobourg	Sep-05
Town of Cobourg Official Plan Office Consolidation	Town of Cobourg	Aug-02
Town of Cobourg Official Plan Office Consolidation - Schedule of maps	Town of Cobourg	Aug-02
General Heritage Guidelines for the Town of Cobourg Heritage Conservation Districts	Town of Cobourg	Mar-02
Market Analysis Study Downtown Cobourg – Harvest Festival – On Site Survey	Town of Cobourg	2007

An Economic Development Strategy for the town of Cobourg	Town of Cobourg	2006
Market Threshold Analysis - Town of Cobourg	Town of Cobourg	2006
Market Analysis Study Downtown Cobourg - Sidewalk Sale - On site Survey	Town of Cobourg	2006
Market Analysis Study Downtown Cobourg - Sidewalk Sale - On site Survey	Town of Cobourg	2006
The Corporation of the Township of Cramahe - Community Improvement Plan	Township of Cramahe	Oct-07
The Corporation of the Township of Cramahe - Accessibility Plan	Township of Cramahe	Dec-03
Township of Hamilton Official Plan	Township of Hamilton	Oct-03
New Campbellford Skate Park Receives Support from Ontario Trillium Foundation	Trent Hills	Aug-08
Trent Hills Chamber of Commerce Strategic Tourism Marketing Plan 2008-2011	Trent Hills	Mar-08
Community Recreation and Wellness Centre Feasibility Study	Trent Hills	Jan-08
Downtown Community Improvement Plan	Trent Hills	Jan-07
5 Best Craft Breweries to Visit in Canada	Trent Hills	Dec-06
Campbellford Celebrates the Completion of Waterfront Development Project – Phase 1	Trent Hills	Jun-06
Market Feasibility Study for the Municipality of Trent Hills	Trent Hills	Mar-06
Hastings Waterfront & Downtown Design Improvements	Trent Hills	2009
Downtown Campbellford Commercial Study	Trent Hills	2007
Downtown Community Improvement Plan	Trent Hills	2007
The Municipality Of Trent Hills Official Plan - Amendment 3	Trent Hills	2005
Official Plan Amendment No. 3	Trent Hills	2005
The Municipality Of Trent Hills Official Plan	Trent Hills	2005
Official Plan Amendment No. 2	Trent Hills	2003
It's All About Water. Report of The Panel on the Future of the Trent-Severn Waterway	Trent Severn Waterway	Mar-08
A study of the Past, Present and Future of Water Management on the Trent-Severn Waterway National Historic Site of Canada - Consultation Report	Trent Severn Waterway	May-07

Appendix G

Northumberland County Premier-ranked Tourist Destination Project – Research Report

Tourism Related Heritage Sites in Northumberland County

Museums

Barnum House National Historic Site of Canada
Campbellford Memorial Military Museum
Campbellford Seymour Heritage Museum
Canadian Fire Fighters Museum
Dorothy's House Museum
Historic Cobourg Jail
Marie Dressler House
Memory Junction - Brighton's Railway Museum
Proctor House Museum
Tom Thomas Native Art Museum

Provincial Heritage Sites (Plaques)

Alderville Manual Labour School
Barnum House - Grafton
Bluestone House 1834 – Port Hope
Church of St. Peter - Cobourg
The Cobourg and Peterborough Railway 1852-1898 - Cobourg
The Eldorado Refinery – Port Hope
The Founding of Cobourg - Cobourg
The Founding of Colborne - Colborne
The Founding of Port Hope – Port Hope
The Honourable James Cockburn 1819-1883 - Cobourg
The Loss of the Speedy - Brighton
Marie Dressler 1868-1934 - Cobourg
Old St. Andrew's Church - Grafton
St. Mark's Church – Port Hope
Victoria College - Cobourg
Victoria Hall - Cobourg
William Weller 1799-1863 - Cobourg
J.D. KELLY 1862-1958 - Warkworth
The Founders of Campbellford - Campbellford
The Founding of Hastings - Hastings
The Township Of Hamilton - Gore's Landing
Joseph Medicott Scriven 1819-1886 - Port Hope

Cultural/Historic Landscape

Alderville First Nation
Downtown Cobourg Heritage District
The John, Ontario and Queen Street Heritage Conservation District
The Walton Street Heritage Conservation District

Archives

Bewdley Public Library
Campbellford-Seymour Heritage Society
Cobourg Public Library
Port Hope Archives
Port Hope Public Library
The Cobourg and District Historical Society Archives

Aboriginal Heritage Sites

Alderville First Nation
Alderville Manual Labour School

Local Heritage Sites (Significant)

War Memorial, Alderville, Alderville
War Memorial, Bewdley
Memory Junction Museum, Brighton
Brighton Municipal Dock/Presquile Hotel, Brighton
Proctor House , Brighton
Presq'ile Point Lighthouse, Brighton
War Memorial, Brighton
Campbellford - Seymour Heritage Society Centre
Anglican Christ Church, Campbellford
Bridges - Old Mill Park, Campbellford
Campbellford Firehall (1889), Campbellford
Campbellford - Seymour Agricultural Society Fair Grounds
Empire Cheese & Butter Cooperative, Campbellford
Lions Gateway - Grand Road, Campbellford
Memorial Military Museum, Campbellford
Railway Heritage - Rotary Trail, Grand Road, Campbellford
Raney Falls Generating Station, Campbellford
Schools of Campbellford - Seymour, Campbellford
War Memorial, Campbellford
MacKechnie House, 173 Tremaine Street , Cobourg
Marie Dressler House, Cobourg
Pratt's Mill, Cobourg
Victoria Hall / Cobourg Town Hall , Cobourg
Dorothy's House Museum, Garden Hill
Barnum House, Grafton
Harwood School House, Harwood
Harwood Station Museum , Harwood
Sacred Heart Church, Harwood
St. John's Anglican Church, Harwood
War Memorial, Hastings
Capitol Theater, Port Hope
Port Hope Archives , Port Hope
Port Hope Town Hall, Port Hope
Scriven Monument, Port Hope
The Canadian Fire Fighters Museum, Port Hope
Roseneath Carousel
War Memorial, Roseneath
Trent-Severn Waterway, Trent Hills
War Memorial, Trent River
St. Paul's United Church, Warkworth
War Memorial, Warkworth

Cultural/Historic Travel Corridor

The Apple Route
The Trent Severn Waterway

National Historic Sites

Barnum House National Historic Site of Canada
Trent-Severn Waterway
Victoria Hall / Cobourg Town Hall National Historic Site

Appendix H

Northumberland County Premier-ranked Tourist Destination Project – Research Report

Websites

Arts & Cultural Organizations	Northumberland Hills Arts Association/Spirit of the Hills	http://www.spiritofthehills.org
	Arts Council of Northumberland	http://www.northumberlandarts.ca
Associations	Canadian Association of Fairs and Exhibitions C.A.F.E.	http://www.canadian-fairs.ca
	Ontario Accommodation Association	http://www.ontarioaccommodation.com
	Ontario Federation of Anglers and Hunters	http://www.ofah.org
	The Tourism Industry Association of Ontario	http://tiao.travel
	Tourism Industry Association of Canada	http://www.tiac.travel
	The Cobourg Downtown Business Improvement Area	http://www.downtowncobourg.ca
Rice Lake Tourists Association	http://www.ricelakeinfo.com	
Chambers of Commerce	Brighton and District Chamber of Commerce	http://www.brightonchamber.ca
	Northumberland Central Chamber of Commerce	http://www.cobourgchamber.com
	The Port Hope Chamber of Commerce	http://www.porthopechamber.com
	Trent Hills and District Chamber of Commerce	http://www.trenthillschamber.ca
Clubs	Cobourg Cycling Club	http://www.cobourgcyclingclub.com
	Ganaraska Freewheelers Cycling Club	http://www.hedney.com/freewheelers
	Ganaraska Snowmobile Club	http://www.ganaraskasnow.ca
	Great Pine Ridge Snowmobile Association	http://www.gosledding.ca
	Northumberland District ATV Riders	http://www.northumberlandatvriders.com
Northumberland Trail Riders	http://northumberlandtrailriders.com	
Economic Development	Ontario East Economic Development Commission	http://www.onteast.com
Government	Canadian Heritage/Culture Canada	http://culturecanada.gc.ca
	Ontario Ministry of Culture	http://www.culture.gov.on.ca
	Ontario Ministry Of Natural Resources	http://www.mnr.gov.on.ca
	Ontario Ministry of Tourism & Recreation	http://www.tourism.gov.on.ca
	Statistics Canada	http://www.statcan.gc.ca
	Ontario Tourism Marketing Partnership Corporation	http://www.ontariotravel.net
Festivals & Events Ontario	http://www.festivalsandeventsontario.ca	
Heritage Organizations	Architectural Conservancy of Ontario Port Hope	http://www.acoporthope.ca
	Cobourg Local Architectural Conservation Advisory Committee	http://www.cobourg.ca/lacac
	Cobourg Museum Foundation	http://northumberlandheritage.ca
	Heritage Port Hope	http://www.heritageporthope.com
	The Pier Group	http://www.thepiergroup.ca
	Warkworth Percy Historical Society Home page	http://warkworthpercyhistoricalsociety.com
Labour	Workforce Development Board	http://www.solutionsatwork.info

Websites

Municipalities	Alnwick Haldimand Township	http://www.alnwickhaldimand.ca
	Hamilton Township	http://www.hamiltontownship.ca
	Municipality of Trent Hills	http://www.trenthills.ca
	Municipality of Brighton	http://www.brighton.ca
	Northumberland County	http://www.northumberlandcounty.ca
	Northumberland PRTD	http://www.nprtd.com/
	Northumberland Tourism	http://www.northumberlandtourism.com
	The Municipality of Port Hope	http://www.porthope.ca
	Town of Cobourg	http://www.cobourg.ca
	Township Of Cramahe	http://www.visitcramahe.ca
Parks and Conservation Areas	Eastern Ontario Trails Alliance	http://www.thetrail.ca
	Ganaraska Region Conservation Authority	http://www.grca.on.ca
	Lower Trent Conservation Authority	http://www.ltc.on.ca
	Ontario Parks	http://www.ontarioparks.com
	Parks Canada	http://www.pc.gc.ca
	The Conservation Easement Group /Save The Crowe	http://www.savethecrowe.com
	The Trans Canada Trail	http://www.tctrail.ca



For further information please contact:

Northumberland Economic Development and Tourism
555 Courthouse Road, Cobourg, Ontario, K9A 5J6
Telephone: (905) 372-3329 or 1-800-354-7050

Website: www.northumberlandcounty.ca