

Northumberland County Premier-Ranked Tourist Destination Project

*“Working together for
our future success”*

Executive Summary - October 2009

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 destination development, such as 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 7.3 million potential tourists within a three hour 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 development action 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.

“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”.

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's success in providing a quality tourist experience by examining:
 - *Visitation*
 - *Occupancy and Yield; and,*
 - *Critical Acclaim.*
3. **The Futurity Dimension** evaluates Northumberland's ability to thrive from tourism and its sustainability into the future through:
 - *Destination Marketing;*
 - *Product Renewal; and*
 - *Managing within Carrying Capacities.*

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. The following chart indicates the survey response rate by industry sector.

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

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 research team and will be available in late October, 2009. It contains the detailed research that supports this report.

Project Milestones

With approval from County Council and support from the Northumberland Tourism Advisory Committee, Northumberland County Economic Development and Tourism initiated the PRTD Framework in September 2008.

- ❖ **October 2008** – Ministry of Training, Colleges and Universities (MTCU) and The Ministry of Tourism agree to fund the PRTD Initiative.
- ❖ **November 2008** - Project staff hired, and worked to build database of tourism stakeholders and prepare survey.
- ❖ **December 2008** – Contracted with Brain Trust Marketing & Communications to analyze findings, facilitate validation process with the industry, make observations, identify recommendations and prepare the final report.
- ❖ **January 15, 2009** - Initial meeting with community champions (industry leaders).
- ❖ **February 2 to March 27 2009** – Industry surveys mailed out, completed and data entered into database.
- ❖ **April 30, 2009** - Final survey collection complete, Resource audit and opportunity matrix data collection complete.
- ❖ **May 2009** - Consultant analyses data, receives input from research team and senior tourism staff.
- ❖ **May 5, 2009** - Community champions industry consultation meeting to provide project status, 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 are endorsed.
- ❖ **August 25, 2009** – Community Champions Committee provides final review of draft PRTD Recommendation Report prior to being presented to County Council for approval.
- ❖ **September 16, 2009** - Final recommendations approved by County Council.

Quick Facts - Northumberland County Tourism Profile

What does tourism in Northumberland County look like now?

- **Visitation:** Totals 1.33 Million visitors annually
- **Visitation:** 61% same-day visits and 39% overnight visits
- **Origin** (same-day visits): *96.8% from within Ontario, 2.6% from the U.S., 0.02% from other provinces and 0.04% from international markets
- **Origin** (Overnight visits): *84.1% from within Ontario, 8.9% from the U.S., 4.3% from other provinces and 2.7% from international markets

* The PRTD survey indicated that on average, **58% of all visitors** (across all sectors), **were from the local area**.

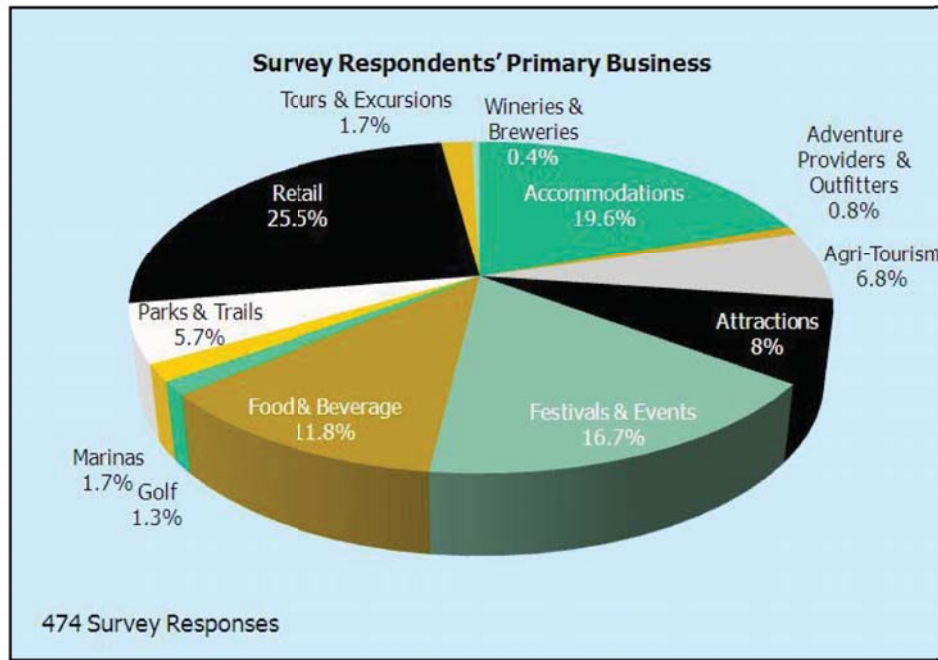
- **Per Capita Spending:** The average expenditure for guests on **day trips** to Northumberland was \$84.00 versus the province's average of \$165.00.

The average expenditure for **overnight visitors** was \$146.00, compared to the \$298.00 average for Ontario.

- **Total spending:** \$111.7 million generating \$3.8 million in municipal tax revenue, \$60.5 million in labour income and 1,725 full and part time jobs.
- **Traveler profile:** Average travel party size: 1.7 people , 91% adults, 9% with children, Average age: 44.6 years
- **Purpose of visit:** 38.5% pleasure, 52.6% visiting friends & relatives, 4.3% business, 4.4% personal.
- **Seasonality** (Total visits): Jan-March (18%), April-June (27%), July-Sept (28%), Oct-December (27%).
- **Seasonality** (Overnight visits): Jan-March (9%), April-June (31%), July-Sept (38%), Oct-December (22%).

Source: Statistics Canada, Travel Survey of Residents of Canada (TSRC) and International Travel Survey (ITS), 2007

Quick Facts - Northumberland County Tourism Profile



Source: PRTD Survey, 2009

Accommodation Type	No. of Properties	Total No. of Rooms
RV Parks & Campsites	26	2006 (sites)
Cottages	49	582 Cabins (with 1-5 bedrooms)
Bed & Breakfast	39	108
Eco-Lodge	1	6
Motel - Independent	8	62
Hotel – Independent (more than 20 rooms)	7	148
Hotel/Inn – Independent (with > 6 < 20 rooms)	19	164
Hotel – Chain	3	200
Total	152	1270 Rooms + 2006 Sites

Source: PRTD Survey 2009

Activity Participations for Visitors to Northumberland	Total Person Visits to Northumberland
Boating	71,000
Sports Events	69,000
Festivals/Fairs	66,000
Fishing	59,000
Historic Sites	59,000
Cultural Performances	56,000
Museums/Art Galleries	34,000
Provincial/Nature Parks	30,000
Golfing	22,000

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

Northumberland County's Core Attractors

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

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.

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 236 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'ie 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**, including Chambers of Commerce, Business Improvement Associations (BIA's), and Municipal Economic Development & Tourism Depts.
- Northumberland 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 Tourism 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 Project Team:

Research Coordinators	Paul MacDonald Teresa Grant Linda Johnston Amy Sallows
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Ontario Ministry of Training Colleges and Universities	Liz Basinger Employment Training Consultant
Project Consultant	Richard Innes Brain Trust Marketing & Communications

Acknowledgements

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