

PREMIER-RANKED TOURIST DESTINATION PROJECT

BROCKVILLE AND DISTRICT

- City of Brockville ● Front of Yonge Township ● Town of Prescott
 - Township of Athens ● Township of Elizabethtown-Kitley
- Township of Augusta ● Township of Edwardsburgh / Cardinal

FINAL REPORT

January 2008



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EXECUTIVE SUMMARY

The Brockville and District Premier-ranked Tourist Destination Framework (PRTD) project is an initiative facilitated by Brockville and District Chamber of Commerce in partnership with, the Ontario Ministry of Tourism, Employment Ontario, and tourism industry stakeholders.

The scope of the project includes a large geographic area and included the following towns and townships:

- CITY OF BROCKVILLE
- FRONT OF YONGE TOWNSHIP
- TOWN OF PRESCOTT
- TOWNSHIP OF ATHENS
- TOWNSHIP OF ELIZABETHTOWN-KITLEY
- TOWNSHIP OF AUGUSTA
- TOWNSHIP OF EDWARDSBURG/CARDINAL

What is the Premier-ranked Tourist Destination Framework?

The PRTD was developed by the Ontario Ministry of Tourism to provide a means for tourism destinations to define their competitive position within the tourism marketplace. Premier-ranked is not a formal tourism designation but, rather an internal tourism goal to help destinations become “better than the rest” by improving their viability and competitiveness as a place people want to visit.

Why Brockville and District?

The desire of the Brockville and District Tourism Advisory Committee is to improve the destination from a variety of perspectives in order to improve its ability to annually attract a greater number of visitors. If successful, improving the destination will not only generate an increase in economic impact but it will enhance the quality of life of the resident population. There is no better time than now to have undertaken this assessment. Many positive things are at play within Brockville and District, the most significant being the recommendations from the Anchor Attraction Proposal.

Tourism to Brockville and District is significant contributor the local economy. In 2004 the United Counties of Leeds Grenville attracted a total of 1,932,393* guests. Total spending by guests is \$188,744,895. Those on day trips spent \$55,296,466. Guests on overnight trips spent \$133,448,429. Tourist visits to Brockville and District make a net positive contribution to the local economy. The \$188,744,895 in spending by all visitors generated over \$131,929,000 in direct, indirect and induced contributions to gross domestic product (GDP), \$67,999,000 of labour income and salaries and, 2,449 part-time, full-time and seasonal jobs. Total taxes generated as a result of visitor spending in Leeds and Grenville reached \$81,055,000 including \$4,083,000 in municipal taxes.

*2004 Statistics Canada CTS/ITS Survey, includes numbers for the United Counties of Leeds Grenville which includes Brockville and District.

The tourism industry in Canada has faced tremendous challenges over the past few years and Brockville and District is no exception to this. Several years of decline on most key tourism benchmarks combined with unfavourable market conditions and increased competition from other destinations requires strong measures to address these challenges. The PRTD project was judged to be an excellent tool to help Brockville and District meet these challenges.

The Three Dimensions of Tourism Assessment

1. The Product Dimension

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

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

2. The Performance Dimension

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

- Visitation
- Occupancy and Yield
- Critical Acclaim

3. The Futurity Dimension

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

- Destination Marketing
- Product Renewal
- Managing within Carrying Capacities

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

The PRTD Process

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

- A database of "potential" tourism businesses was created and 275 questionnaires were delivered to companies representing the accommodation, food and beverage, attraction, heritage and cultural, campgrounds and parks, marinas, golf, transportation, retail, events, festivals and outdoor adventure sectors.
- 131 surveys were completed, representing a response rate of 48%.
- Secondary research was also 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 workbook and the Tourism Resource Opportunity Matrix.

What did the process determine?

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

Core Attractors are:

- 1000 Islands & St Lawrence River Experience
- Heritage & Living History

The Supporting Attractors are:

- Outdoor Recreation
- Brockville Arts Centre and Performing Arts In General
- Scuba Diving

The process shed light on other areas related to Brockville and District's tourism assets:

- Products and experiences have both “mass” and “niche” appeal.
- While core attractors offer collective appeal there are other destinations that offer similar products and experiences.
- Attractors do appeal to guests from beyond Ontario's borders.
- Core and supporting experiences are not available on a year-round basis and typically does not generate visitation for periods greater than 24 hours.
- The destination could offer a more positive visitor experience by addressing the seasonal availability of its attractions.
- Gaps in infrastructure exist such as its limited hours of access to public washrooms, the maintenance of public areas including provision of garbage facilities, and the convenience of public spaces in regard to parking, bike racks, or support for divers.
- Although the destination understands tourism and the role of destination marketing and servicing the visitor, it does not have a product positioning statement that describes in consumer terms its product offering or experience.
- Brockville and District offers a variety of cultural and entertainment experiences and feature well known performers and artists.
- The destination offers a selection of dining experiences however few have name recognition outside the area, feature well known accredited chefs; none offer a wine list with more than 25 labels.
- Niche activities (diving, fishing, ATV tours) are experiencing increased visitation, but mass market activities (visit historical sites, river cruise) are experiencing flat and/or decreased visitation.
- There are a variety of modes of travel available to reach the destination however it is not accessible to cruise ships.
- The destination offers visitors limited accommodation options with a total of 599 roofed guest rooms and 91 camp/RV sites at a variety of price points.
- Commercial accommodation occupancy in 2005 for Leeds & Grenville United Counties was 61.8%; this is below the provincial average of 65%. The average daily rate was \$88.04, and Rev Par was \$54.00. Source: PKF, 2005
- The average expenditure for guests on day trips was \$44.52 compared to \$62.56 average for Ontario, overnight guest spend on average \$190.82 compared to \$270.27 average for Ontario.
- The destination is not considered a “must see / must do” destination and has few experiences that have been ranked as “Number 1,” “Best in Class” or “top tier.”
- Within the destination there are several municipalities that identify tourism within their plan. Brockville and District Chamber of Commerce is the only recognized Destination Marketing Organization (DMO) but limited communication has been done.
- The municipalities and the DMO do not have sufficient funding to effectively target potential markets.
- While customer service training is viewed as important, little or no region-wide initiatives are in place.
- Labour issues exist; semi skilled labour is not readily available.
- Managing the carrying capacities of the natural systems that sustain local ecosystems and quality of life are well understood and monitored.
- Where the environment or quality of life are at risk or are being impaired, a plan to resolve the problem is being implemented.

*Statistics from the 2004 Statistics Canada CTS/ITS Survey, includes numbers for the United Counties of Leeds Grenville which includes Brockville and District.

How Brockville and District Rates

Measurement criteria were used to rate Brockville and District's performance in three key areas: Product, Performance and Futurity. After completing the Destination Performance Summary it was determined the destination has a positive score related to its Product dimension but is lacking in areas related to Performance and Futurity.

PRODUCT - The Tourist Destination provides a high quality tourist experience.

Almost - 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.

No, the affirmation cannot be made or supported for the destination

FUTURITY - The ability for a destination to thrive from tourism into the future.

No, the affirmation cannot be made or supported for the destination

While positive affirmations cannot be made for all three of these measurement criteria Brockville and District **has potential to improve**.

Recommendations

The following recommendations have been developed in consultation with the Premier-ranked Tourist Destination Steering Committee, the Brockville and District Tourism Advisory Committee and tourism stakeholders.

Immediate – January - December 2008

- Brockville and District Chamber of Commerce, specifically the Brockville and District Tourism Advisory Committee takes responsibility for ensuring the recommendations contained in the PRTD Report are initiated.
 - This group should recommend a formal process to undertake the recommendations and determine who does what.
 - Brockville and District Tourism formalize communication links with all municipal agencies on topics related to tourism, North/South and East/West.
- Implement a process for the creation of a Brockville and District Tourism Destination Development Plan (ASAP) and incorporate the recommendations and course of action coming from Brockville's Anchor Attraction Report.
- Support for the realization of the Maritime Discovery Centre.
 - A group of influencers are identified and charged with the responsibility.
 - The MDC and Phase 2 if done simultaneously will significantly enhance the immediate viability of the destination.
- Grow tourism development and marketing budgets through the introduction of a volunteer destination development / marketing fee by April 2008.
- Attention should be given to the work completed by the Railway Tunnel Committee. This heritage site, once developed, could have significant appeal to heritage visitors.
- Introduce an annual visitor survey to track visitor experiences.

Mid Term – January - December 2009

- Understand current travel motivations / behaviours of visitors as identified in the 2006 Travel Activities and Motivation Study and match these motivators with the products featured in the Brockville and District.
- Focus attention on the Underdeveloped and Underperforming Assets in the destination.
 - Brockville and Prescott ports, Railway Tunnel, Scuba Diving, Public Spaces, Brockville Arts Centre, Heritage Experiences
- Increase awareness of the importance of tourism among the tourism industry, business leaders, influencers, residents and government officials.
- Develop a Brockville and District product positioning statement and line and establish a brand that describes in consumer terms the product offering and experience that positions the destination as an attractive and interesting visitor destination today and in the future.,

Long Term - 2010 and Beyond

- Identify tactics to extend length of stay:
 - Conduct workshops that encourage the packaging of tourism experiences among industry operators.
 - Open For Business – encourage tourism businesses to improve hours of operation daily and seasonally.
- Improve accessibility and way finding within the destination.
- Encourage long term improvements to Brockville's accommodation base including development of new properties and upgrades to existing properties.
- In Prescott attention should be given to the Official Plan as it relates to the comprehensive program of façade improvement, sensitive infill development, adaptive re-use, and streetscape upgrading to enhance the character of Downtown Prescott.

ACKNOWLEDGEMENTS

Brockville and District Chamber of Commerce acknowledges and thanks the many tourism business operators and industry colleagues who contributed to the success of the Brockville and District Premier-ranked Tourist Destination Project.

Brockville and District Chamber of Commerce Tourism Advisory Committee - 2007

- Gary Brett, Vice-Chair, Brett's valu-mart
- Gord Beach, City of Brockville, Council
- Pam Brooks, Fulford Place
- Sueling Ching, Brockville and District Chamber of Commerce
- Peter Dunn, Brockville Arts Centre
- Helen Cooper, Dive Brockville Adventure Centre
- Vincent Germani, United Counties of Leeds and Grenville
- Laura Good, Chair, Employment & Education Centre
- Josie Groniger, Brockberry Café & Suites
- Rob Hunter, Downtown Brockville
- Sharon Jordan, Royal LePage Riveredge Realty Ltd.
- Larry Journal, City of Brockville, Council
- Susan Le Clair, St. Lawrence Parks Commission
- Dave Paul, City of Brockville, Economic Development Dept.
- Bob Pearce, Past Chair, The Recorder & Times
- Libby Pilon, Fort Wellington National Historic Site of Canada
- Pam Robertson, Comfort Inn
- Ann Weir, (ex-officio), Brockville and District Chamber of Commerce

Brockville and District Premier-ranked Tourist Destination Advisory Committee

- Sueling Ching, Executive Director, Brockville and District Chamber of Commerce
- Suzanne Dodge - Mayor, Town of Prescott
- Vincent Germani - Economic Development Co-ordinator, United Counties of Leeds & Grenville
- Mike Kalivas - Councillor, City of Brockville
- Mel Campbell - Reeve, Township of Augusta
- Dave Paul - Economic Development Director, City of Brockville
- Bob Pearce - Publisher, The Recorder & Times
- Roger Haley - Reeve, Front of Yonge Township
- Jim Pickard - Mayor, Township of Elizabethtown-Kitley
- John Conley - Mayor, Township of Athens
- Larry Dishaw - Mayor, Township of Edwardsburgh/Cardinal
- Larry Journal –Councillor, City of Brockville

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Andy Neeteson	1000 Islands & Seaway Cruises
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Bhagwant Parmar	Quality Hotel Royal Brock
Bob Pearce	The Recorder & Times
Bruce Wylie	JRfm 104.9, CHUM Radio
Helen Cooper	Dive Brockville Adventure Centre
Joanne Monteith	St. Lawrence Islands National Park of Canada
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Laurence Bishop	St. Lawrence Sport Productions
Libby Pilon	Fort Wellington National Historic Site of Canada
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David Henderson	Mayor, City of Brockville
Jim Pickard	Mayor, Township of Elizabethtown-Kitley
John Ackerman	Buds on the Bay
Laura Good	Employment & Education Centre
Peter Dunn	Brockville Arts Centre
Randy Pelehos	Town of Prescott - Community Services
Roger Haley	Reeve, Front of Yonge Township
Suzanne Dodge	Mayor, Town of Prescott
Tracey Larocque	1000 Islands Mall

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BACKGROUND

The Premier-ranked Tourist Destination program 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 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.

Several regions in Ontario have completed PRTD projects including the Regional Municipalities of Halton, Niagara, York, Prince Edward County, Muskoka and Durham. The cities of Mississauga and Hamilton have also completed their PRTD assessments and have used the results of their studies in the development of comprehensive tourism plans. The City of Toronto is currently underway with their PRTD assessments.

The Brockville and District PRTD project is an initiative facilitated by Brockville and District Chamber of Commerce in partnership with, the Ontario Ministry of Tourism, Service Canada (now Employment Ontario), and tourism industry stakeholders. The funding for the project came from four sources – Brockville and District Chamber of Commerce, City of Brockville, Employment Ontario and the Ontario Ministry of Tourism.

The scope of the project includes a large geographic area and included the following towns and townships:

- Front of Yonge Township
- Township of Athens
- Township of Elizabethtown-Kitley
- City of Brockville
- Township of Augusta
- Town of Prescott
- Township of Edwardsburg/Cardinal.

It should be understood that the PRTD project is a shared initiative of individuals in the tourism industry, volunteer tourism agencies within the area and the Brockville and District Chamber of Commerce.

The successful implementation of the recommendations is 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. At the outset the Brockville and District Chamber of Commerce Tourism Advisory Committee understands this responsibility.

A Brockville and District PRTD Advisory Committee, made up of representatives from a variety of municipal governments, local tourism partners and industry stakeholders was established to direct and guide the development of the overall project. Through funding from Employment Ontario, contract staff was hired to execute the development and completion of the PRTD resource audit.

The resource audit was carried out in the form of a detailed survey of Brockville and District establishments which asked respondents to describe their operations, services offered, customer base and tourism awareness among others. The survey was mailed to Brockville and District establishments from Accommodations, Water-based Recreation, Land Based Recreation, Natural Resources, Cultural and Heritage Resources, Food and Beverage, Attractions and Retail sectors. Survey results were compiled in a comprehensive database maintained by the Audit Team.

To assist the PRTD Advisory Committee with the analysis of the audit results and the preparation of the final report, a tourism industry consulting firm was retained in January 2007. The consultant worked with the PRTD Advisory Committee and chamber staff to review the results, assess current industry strengths, weaknesses, attributes, product/service gaps, factors and conditions that impact existing and future development plans and identify potential opportunities and partnerships within the tourism industry.

Initial findings from the audit, together with identification of Brockville and District's key tourism attractors were presented to the PRTD Advisory Committee and Industry focus groups held on February 6th, April 23rd, May 9th and May 25th. Based on the feedback and comments received from the PRTD Advisory and the tourism industry stakeholders at these sessions, recommendations for inclusion in the final report were presented to the PRTD Advisory Committee on June 25th, 2007.

It can be safely said that as a result of this consultative process the tourism industry in Brockville and District 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 Brockville and District.

INTRODUCTION

What is the Premier- Ranked Tourist Destination Framework Process?

The Premier-ranked Tourist Destination Framework (PRTD) 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 on domestic and international levels.

**“Premier ranked is defined as:
“A place more attractive than the rest, a place the tourist
should consider first when making travel plans.”**

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 in order to grow tourism revenues for the destination and its tourism shareholders. The workbook format provides a methodology that communities can follow to ensure consistency, accuracy, and involvement of the key tourism and economic development stakeholders in the process.

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.

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

1) The Product Dimension

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
- Accommodations Base.

2) The Performance Dimension

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

- Visitation
- Occupancy and Yield
- Critical Acclaim.

3) The Futurity Dimension

The ability for a destination to thrive from tourism into the future is sustained by:

- Destination Marketing
- Product Renewal
- Managing within Carrying Capacities.

The process involves several critical steps along with a serious commitment and investment of time by industry partners. This investment of time and energy is rewarded with specific insights and direction. At its conclusion, the Premier-ranked Tourist Destination research project provides:

- A database of critical baseline tourism business data
- An understanding of Brockville and District's destination status and the opportunities and challenges constraining that status
- A solid base for preparing a long-term regional tourism strategy
- Product development and partnership opportunities
- Recommendations that support the growth and sustainability of the tourism sector
- A foundation to attract tourism investment and create employment opportunities.

The additional benefit of this methodology is the mobilizing of an expanded and more capable network of industry stakeholders. By working through this process stakeholders will have a more cohesive focus on solving current and future challenges that face the destination.

Why Brockville and District?

Vision Statement

To be a vibrant community that is known as a tourist destination of choice that culturally presents a rich and unique entertainment centre and a pristine waterfront that is known for its activities, beauty and its world class hospitality.

Mission Statement

Increase tourism in the area by promoting and developing our local assets with emphasis on our unique heritage and spectacular river location. We will focus on types of tourism that will fit these attributes and will bring increasing economic benefits to a variety of businesses and groups in our community.

The desire of the Brockville and District Tourism Advisory Committee is to improve the destination in order to attract visitors with disposable income. As a result this will enhance the well being and quality of life of the resident population and support the business community that is located in the area. There is no better time than now to have undertaken this assessment. Many positive things are at play with Brockville and District, the most significant being the recommendations from the Anchor Attraction Proposal. The PRTD process, a shared initiative of the tourism industry and government, is a significant step in ensuring this happens.

The PRTD project and the ensuing findings and recommendations will:

- Rally the tourism industry in Brockville and District
- Help determine Brockville and District's current state and potential as a visitor destination
- Capitalize on investments made by the tourism industry in new product development, which in the case of Brockville and District is significant
- Determine areas for future tourism product development
- Establish a clear "way forward" to grow tourism visitation to the area
- Increase overall revenues of tourism operators within the region.

Starting from a Position of Strength

The Premier-ranked Tourist Destination process is designed to identify the areas where improvements are required. That being said this work has been done against the backdrop of an area that is starting from a position of strength, these include:

- Strong community leadership group that is comprised of both public and private sector interests in and outside of the tourism industry.
- Focused strategic directions from the Brockville and District Tourism Advisory Committee for tourism development:
 - Destination and Experience Development
 - Partnership and Resource Development

- Strategic Marketing
 - Image and Awareness
 - Visitor Focus.
- A recently completed Anchor Attraction Report containing solid recommendations.
 - Participation in the 1000 Islands & St. Lawrence River Tourism Marketing Partnership, they include:
 - Brockville and District Chamber of Commerce
 - 1000 Islands Gananoque Chamber of Commerce
 - Cornwall & Seaway Valley Tourism
 - Kingston Economic Development Corporation
 - 1000 Islands Casino
 - 1000 Islands Community Futures Development Corporation
 - 1000 Islands International Tourism Council
 - Grenville Community Futures Development Corporation
 - Ontario Ministry of Tourism (ex officio)
 - Ontario Tourism Marketing Partnership
 - Parks Canada
 - St. Lawrence Parks Commission
 - Town of Prescott.
 - A view to capitalize on the Brockville and District's tourism assets to leverage growth opportunities for the business community.
 - The development of a new tourism web site.

These factors compare well to other destinations within Ontario and on many levels set Brockville and District apart.

Project Process

	April – Nov. 2006	Dec. – June 2007	July – Dec. 2007
EVALUATION – <i>Resource Audit</i>			
INTERPRETATION – <i>Performance Summary</i>			
PLANNING – <i>Findings & Recommendations</i>			

Completion of the Premier-ranked Tourist Destination project framework is based on the Audit Team facilitating the following four step process:

Step One: Data Base Design and Collection

- A database of “potential” tourism businesses was created and 275 questionnaires were delivered to companies representing the accommodation, food and beverage, attraction, heritage and cultural, campgrounds and parks, marinas, golf, transportation, retail, events, festivals and outdoor adventure sectors.
- 131 surveys were completed, representing a response rate of 48% - which is equal to or better than results achieved in other regions in Ontario and considered more than acceptable for the purpose of the work.
- The survey data was accumulated, entered, clarified, analyzed and evaluated using the PRTD workbook and the Tourism Resource Opportunity Matrix.

Return Rates by Sector

Operator Classification	Number of Businesses	Number of Surveys Returned	Percent Returned
Accommodations	45	23	51
Festivals and Events	49	29	59
Food and Beverage	56	14	29
Retail	61	17	28
Golf	7	5	71
Attractions	18	13	72
Marina	6	2	33
Outdoor Recreation, Parks/Trails	9	9	100
Tours and Excursions	12	11	92
Outdoor Adventure	11	7	64
Wineries and Breweries	1	1	100
Total	275	131	48%

Return Rates by Towns and Townships

Towns and Townships	Number of Businesses	Number of Surveys Returned	Percentage (%)
Athens	22	10	45
Augusta	13	8	62
Brockville	128	63	49
Edwardsburgh/Cardinal	23	9	39
Elizabethtown-Kitley	20	14	70
Front of Yonge	25	12	48
Prescott	44	15	34
Total	275	131	48%

Source: PRTD Audit Process

Step Two: Evaluation of the Product, Performance and Futurity Dimensions

- Each of 118 measures included in the PRTD Workbook were completed using the survey data.
- Third party research was also utilized to supplement survey data.
- The Transportation Resources Checklist was completed. Information necessary to complete the checklist was drawn from knowledge or perceptions held in common by area stakeholders in tourism, committee and industry sessions, and through direct contact with attractions, taxi and transit service providers.
- The Travel Trade Resource Checklist was completed from consultation with area attractions and tour operators. Trade association directories helped to identify the relevant operators required to complete the checklist. Additional information was collected by contacting operators to discuss matters raised by the checklist.

Step Three: Completing the Destination Performance Summary

- The consultant along with the Audit Team presented an initial summary of findings to the Premier Ranked Steering Committee and Industry Focus Group for reaction and comment.
- Additional work was undertaken to fill in information gaps and supplement initial findings, some gaps were not filled due to lack of information, for example customer experience / satisfaction data.
- Preparation of preliminary recommendations.

Step Four: Present Summary Findings, Recommendations, Final Report

- Tourism businesses were invited to several presentations to validate findings and recommendations, their comments and feedback were reflected in the on-going development of the final report.
- Brockville and District Tourism Advisory Committee reviewed preliminary observations and recommendations for additional discussion and comments and to formalize and approve the findings and recommendations that would be incorporated into the final report.

EVALUATION PROCESS

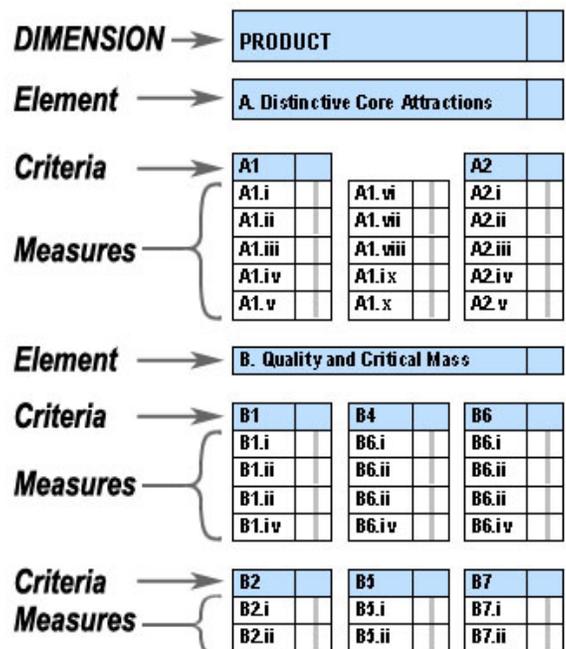
Brockville and District’s performance is assessed by a series of measures specific to the Product, Performance and Futurity dimensions of the destination. The first part of the measure is in the form of a statement, found in the PRTD Workbook, with an implicit question asking whether you can affirm the 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 first part 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 Workbook.

Throughout this report symbols are used to indicate the performance rating of each section as determined by the survey data provided by the participants in the process.

The symbols are as follows:

- *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, the affirmation cannot be made or supported for the destination*

The Performance Summary Form (right) displays the logical structure of the Framework. Being a “Premier-ranked Tourist Destination” requires success across the Product, Performance and Futurity Dimensions. As illustrated each dimension (Product in this case) 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 has ten measures, the second has four. Element B - Quality and Critical Mass has seven criteria, each of which has two to four measures. This summary is created for each of the three dimensions and includes a variety of Elements. Those elements establish the backdrop from which each destination is evaluated.



PRODUCT

Evaluation Rating for Brockville and District

*The **Product** components, criteria, and measures address the features that enable a destination to offer a high quality tourist experience enabled through the destination's offerings of:*

- *Distinctive Core Attractions*
- *Quality and Critical Mass*
- *Satisfaction and Value*
- *Accessibility*
- *Accommodation Base*

The following product characteristics reveal Brockville and District's product attributes:

Distinctive Core Attractors

The evaluation process has identified Brockville and District's core attractors, their distinctiveness, and the nature and size of the visitor markets to which they are to be considered to be attractive. This section assesses:

- *What it is about a destination that makes it stand out as distinct in the marketplace*
- *How the attractors are distinguished*
- *How the attractors are relevant to market wants.*

Brockville and District's Distinctive Core Attractors:

- **1000 Islands & St Lawrence River Experience**
- **Heritage & Living History**

1000 Islands & St Lawrence River Experience

A picturesque water based attractor comprised of a variety of seasonal activities that include guided cruises, pleasure boating, sailing, and canoeing, kayaking, scuba diving, sport fishing, hunting, hiking, biking, birding, and camping.

- St. Lawrence Islands National Park
- Municipally owned islands
- UNESCO Frontenac Arch Biosphere Reserve – a “green” tourism designation

Heritage & Living History

An area rich in heritage with sites of national significance including Fort Wellington, Fulford Place, Homewood Museum, and the Battle of the Windmill site as well as native anthropological sites, mills, shipwrecks, light houses and Canada's first railway tunnel.

- 110 official heritage designations located in Front of Yonge, Athens, Elizabethtown-Kitley, Brockville, Augusta, Prescott and Edwardsburgh/Cardinal

Brockville and District's Supporting Attractors:

- **Outdoor Recreation**
- **Brockville Arts Centre and Performing Arts In General**
- **Scuba Diving**

Outdoor Recreation

A wealth of accessible year-round outdoor activities include hiking, cycling, snowshoeing, snowmobiling, cross country skiing, birding, and ATV trails.

- 15 campgrounds and RV parks

Brockville Arts Centre and Performing Arts In General

Built in 1858, one of Canada's most historic theatres with an annual line up of theatre, comedy and performing arts.

- In addition the St. Lawrence Shakespeare Festival in Prescott

Scuba Diving

19 heritage dive sites / ship wrecks provide for a unique and rewarding diving experience, 28 operators offer services to both skilled and novice scuba divers. Divers travel from regional, national and international locations to experience what some call the world's best fresh water diving. Part of the attraction is the water clarity and no thermocline.

More about the Distinctive Core and Supporting Attractors

Brockville and District's distinctive attractors are part of the 1000 Islands & St. Lawrence River regional complex linked to the physical setting of the area. The area is best described as the Front of Yonge Township, Township of Athens, Township of Elizabethtown-Kitley, City of Brockville, Township of Augusta, Town of Prescott, and Township of Edwardsburgh/Cardinal. The PRTDF process specifically looked at the District of Brockville but with the understanding that the visitor does not consider boundaries that separate these regions.

The **physical** linkages are best connected to the core attractors as follows:

1000 Islands and the St. Lawrence River Experience

- The area sits on the Frontenac Axis, an arch of Precambrian rock that connects the Canadian Shield to the Adirondack Mountains of New York state. This arch divides the Great Lakes lowlands from the Ottawa valley. The islands and unique land formations are a result of glacier action on the bedrock of the Precambrian shield. Natural ecosystems thrive in this area.
- The St Lawrence Seaway is a system of canals and locks that permits ocean-going vessels to travel from the Atlantic Ocean to the Great Lakes. The seaway officially extends from Montreal to Lake Erie, including the Welland Canal. The Seaway plays a significant role in the transportation of goods.

The **historical** linkages are best connected to the core attractors as follows:

Heritage and Living History

- The area is the Garden of the Great Spirit to native North Americans and a refuge to Loyalists who settled and defended the area.
- The area was the playground of the rich and famous.
- The importance of the area during industrialization and the great importance the river held in the transport of goods and people in both directions.
- Prescott was an important trans-shipment point until the opening of the St Lawrence Seaway.
- The St Lawrence Seaway with a system of locks and canals which opened the way for large ships to move between the Great Lakes and Montreal without the need for trans-shipment of cargo.
- This history is evidenced by native anthropological sites, forts, battlefields, mansions, railways, mills, shipwrecks and light houses.

While core attractors offer *collective appeal* there are other destinations that offer similar products and experiences.

Competitive Destination

Distance (KM)*

Gananoque (1000 Islands/St. Lawrence River)	35 km
Kingston (1000 Islands/St. Lawrence River)	70 km
Ottawa (historical / cultural heritage)	120 km
Niagara Region (historical heritage)	460 km
Prince Edward County (waterfront experience / historical heritage)	120 km

The tourism industry in Brockville and District does benefit from its geographic proximity to Toronto and Ottawa; both are a reasonable drive from these two major centres. As a result many visitors to Toronto and Ottawa choose to also include a trip to the 1000 Islands to experience all that is available.

It can be said that the destination does stand out from its competition. Brockville and District is distinct because of its unique offerings which include:

- Heritage sites of national, Provincial, local significance:
 - Fort Wellington National Historic Site
 - Battle of the Windmill Site
 - Fulford Place
 - Homewood Museum
 - Lyn Museum
 - Colourful settlement history.
- History:
 - Brockville is one of the oldest communities in Ontario
 - Brockville is the first community in Upper Canada to be incorporated as a self governing town
 - Canada's first railway tunnel
 - Numerous ship wrecks
 - Museums, murals and mills
 - Prescott Barracks and Hospital
 - Athens Murals Walking Tour
 - Prescott CN Railway Station, Railroad Docks.
- Interesting Architecture:
 - New England Square
 - Prescott Historic Walking Tour
 - Slate roofs
 - City, town and village downtowns with historic architecture.
- Islands available to the public:
 - Municipally owned islands in the St. Lawrence River
 - St. Lawrence Islands National Park.
- Spectacular scenery - the Frontenac Axis offers unique landforms, scenic rugged landscapes and sightseeing opportunities.
- The area is part of the UNESCO Frontenac Arch Biosphere Reserve.

Biosphere Reserves* are areas of terrestrial and coastal ecosystems promoting solutions to reconcile the conservation of biodiversity with its sustainable use. They are internationally recognized, nominated by national governments and remain under sovereign jurisdiction of the states where they are located. Biosphere reserves serve in some ways as “living laboratories” for testing out and demonstrating integrated management of land, water and biodiversity. Each biosphere reserve is intended to fulfill three basic functions, which are complementary and mutually reinforcing:

- A conservation function - to contribute to the conservation of landscapes, ecosystems, species and genetic variation;
- A development function - to foster economic and human development which is socio-culturally and ecologically sustainable;
- A logistic function - to provide support for research, monitoring, education and information exchange related to local, national and global issues of conservation and development.

Biosphere Reserves are designed to meet one of the most challenging issues that the World is facing today: How can we conserve the diversity of plants, animals and micro-organisms which make up our living "biosphere" and maintain healthy natural systems while, at the same time, meet the material needs and aspirations of an increasing number of people? How can we reconcile conservation of natural resources with their sustainable use? Biosphere reserves have been designed as tools for reconciling and integrating the conflicting interests and pressures that characterize land-use planning today.

Source: Frontenac Arch Biosphere Reserve – web site, www.fabr.ca

In terms of guest experience Brockville and District can not claim that its experience is superior in terms of overall satisfaction. The destination could offer a more positive visitor experience by addressing the seasonal availability of its attractions which limit the visitor experience in the shoulder seasons. It could address gaps in its infrastructure such as its limited hours of access to public washrooms, the maintenance of public areas including provision of garbage facilities, and the convenience of public spaces in regard to parking, bike racks, or support for divers. The destination could also improve the packaging and clustering of visitor experiences, visitor trip planning could also be made easier and more enjoyable than it currently is. All these factors contribute to a less than superior overall guest experience.

Although the destination understands tourism and the role of destination marketing and servicing the visitor market it does not have a product positioning statement that describes in consumer terms its product offering or experience.

Brockville and District's products and experiences have both “mass” and “niche” appeal. The Chart below shows the number of trips to The United Counties of Leeds and Grenville in 2004 for various activities.

Activity	Appeal	# of Trips
Visiting friends and relatives	Mass	833,179
Touring families	Mass	Not available
Divers	Niche	Not available
Boating	Niche	270,894
Corporate Travel	Mass / Niche	Not available
Golfing	Niche	41,273
Fishing	Niche	232,168
Cycling	Niche	Not available
Camping	Mass	Not available
Cultural Performances	Niche	96,513
Hunting	Niche	9,491
Festivals/Fairs	Mass	128,380
Museums/Art Galleries	Niche	181,708
National/Provincial Parks	Mass	248,435
Historic Sites	Niche	310,139

Source: 2004 CTS/ITS; Leeds and Grenville

These attractors appeal to guests from beyond Ontario's borders and their appeal can best be described as follows:

Attraction	Appeal
Cruises (mass)	- Experience being on the water to see sights unique to the area.
Sightseeing (mass)	- Enjoy the scenic beauty of the islands, river and rural areas.
SCUBA (niche)	- Fresh water diving with no thermoclines in an area with an abundance of wrecks, historic and natural points of interest.
Boating (niche)	- The St Lawrence River offers a playground for boaters with a variety of bays, islands, points of interest and navigational challenges.
Corporate Travel (mass & niche)	- Convenient location between Ottawa, Montreal, Kingston, Toronto and close to international bridges.
Angling (niche)	- A wide variety of sport fish species in diverse aquatic habitats including protected bays, piers/docks, deep water, islands, shoals.
Cycling (niche)	- Part of the Waterfront Trail, an appealing cycling corridor, and lots of opportunity to ride quiet back roads in a picturesque rural area.
Hunting (niche)	- Variety of small game, water fowl and uninhabited terrain.
National Park (mass)	- St Lawrence Islands National Park, established in 1904 as the first Canadian national park east of the Rockies. The park consists of 20 islands as well as a visitor centre on the mainland. Much of the park is accessible by boat and some islands have picnic and camping facilities.
National Historic / Heritage Sites (niche)	- There are several National Historic Sites in the destination. Some of these sites, such as Fulford Place, Homewood Museum, Fort Wellington, and The Battle of the Windmill, are developed and open to the public.
Theatre, Cultural Performances (niche)	- The Brockville Arts Centre was built in 1858 and is one of Canada's most historic theatres, the St. Lawrence Shakespeare Festival in Prescott presents a world class line-up of summer theatre.

The market segments for which these attractors have appeal have been identified and can best be described as follows:

Ontario Target Groups Summary - OTMPC Market Segments 2006

Name	Upscale Adventurers	Provincial Families	Young Go-Go's	Retired Roamers
Description	Well-off older middle ages married couples with adult age children and some empty nests	Well-off younger and middle -aged suburban and exurban families with lots of children	Young successful , well - off, multi-ethnic urban trendsetters	Midscale mature and older retirees and seniors living in suburbia and towns
Market size (# and % of ON households)	558,366 (11.64%)	952,610 (19.84%)	181,124 (3.78%)	590,162 (12.3%)
Lifestage	Middle aged (45-64) families ; Kids (18+)	Lower middle -aged (35-54) families; Kids (<15)	Young (25-44); Singles; no kids	Mature (55+), no kids
Household Size	Large (Over 1/3 with 4+)	Large (57% with 4+)	Small (73% 1 or 2 people)	Small (67% 1 or 2 people)
Housing Type	Own; Older single-detached	Own; Newer singles and semis	Rent	Own; Older single - detached , 27% rent
Education	University (42%)	College (28%)	University (55%)	High School , College
Job Type	White Collar (41%) Self Employed (14%)	Mixed	White Collar (48%), Service (38%)	Mixed , White & Blue , Self -employed (13%)
Commuting	Public Transit, Car	Car	Public Transit , Walk, Bike	Car, 6% Walk
Ethnic Presence	Average (31% Imm. Pop)	Low (26% Imm.Pop)	Strong (33% Imm. Pop)	Low (15% Imm. Pop)
Language	English and French	English	English and French	English
Household Income	\$121,848 (54% above avg)	\$103,182 (31% above avg)	\$91,492 (16% above avg)	\$64,838 (18% below avg)
Travel Destinations	•Europe, Golf/Ski in Ontario	Ontario, family destinations	•Worldwide travel, Canada	•Mainly North America
# of trips in ON	2,846,260	4,757,604	721,763	2,699,941
Key Leisure Behaviours	Ballet , opera, ski, tennis , golf, casinos , sporting events	Outdoorsy; jet/snow skiing, skate/snowboarding, theme parks , bowling, plays, dinner theatres	Concerts, clubs, movies, health clubs , skiing, restaurants, hiking, camping	Festivals , fairs, markets, RV, garden, boat shows, curling, snowmobiling, hunting, fishing
Media	•Read Newspapers •Use Internet •Do not like flyers	•Light TV /Radio users •Average internet	•Heavy internet/newspapers •Do not like direct mail	Above avg TV /Radio/ newspapers
Travel Motivations	• Connection • Attention to Detail • Aficionados • Flexibility & Technology	• Savers • Group Travel • Family Vacations • Status	• Flexibility & Ecology • Escape • Originality • Attention to Detail	• Nature • Information • Price • Nationalism
Key Markets	• Toronto • Ottawa • Mississauga • London	• Mississauga • Brampton • Hamilton • Ottawa	• Toronto • Ottawa • London • Hamilton	• Hamilton • Ottawa • Toronto • London

US Target Groups Summary - OTMP Market Segments 2006 (Tier 1-3)

Name	High Flyers	Footloose Families	Silver streaks	Young & Restless
Description	Wealthy mix of older families and married couples without children at home	Middle class households with large, younger families working hard to live the American Dream	Mature middle class married couples who have already raised their families, some widows and widowers	Well educated younger singles in smaller childless households
market size (# and % of selected households)	6,536,100 (13.45%)	3,061,462 (6.30%)	4,288,088 (8.83%)	4,789,761 (9.86%)
Lifestage	Middle aged (35-59) families and empty nesters	Younger Middle aged (35-54) families	Mature (45+) empty nesters; a few widows kids	Younger (25-44) Singles; No kids
Household Size	Mix (34% 2 & 46% 4+)	Large (53% 3+ people)	Small (62% 2 or less)	Small (63% with 1-2)
Housing Type	Own; newer single-detached	Own; single-detached	Own; Older Single detached	Mix (2/3 own & 1/3 rent)
Education	College/University & Postgraduate degrees	Some College, Associate & Bachelor degrees	Bachelor & Master's Degrees	College/University & Postgraduate degrees
Job Type	White collar professionals	Service Sector and White Collar	Service Sector and White Collar	White collar professionals
Commuting	Car	Car	Car	Car; Some Bike
Ethnic Presence	Low; Some Asian	Average	None	Low; Some Asian
Language	English and French	English	English and French	English
Household Income	\$150,000+ (well above avg)	\$50k-\$100k (average)	\$75k-\$149k (above avg)	\$50k-\$100k (average)
Travel Behaviours	Europe, cruises, upscale hotels, golf/tennis resorts Frequent flyer programs Online, small travel companies	Theme parks, all-inclusive resorts, ski resorts Drive to destinations Online booking, high on car rentals	Europe, Canada, domestic destinations, casinos Frequent flyers, drive, RV Mid-scale and discount travel booking	Domestic, North America, gambling, skiing, beaches Car rentals Online booking, discount travel booking
Key Leisure Behaviours	Plays, Dance performances Golf, Tennis, Racquetball Attend Hockey, Basketball	Movies, pop music concerts Baseball, soccer, biking Zoos, campgrounds	Concerts, club, movies, plays, concerts Golf, walking, gym Casinos, reading	Plays, movie premieres Jogging, biking, hiking Bars, nightclubs
Media	Read newspapers & magazines Use Internet	Watch TV & read some newspaper Use Internet	Read newspapers & magazines Basic Internet use	Read newspapers and watch TV Heavy Internet use
Travel Motivations	Advertising & Brand Spontaneity Spiritual Journeys Open Minded	Experiential Multiculturalism Time Savers Crowds	Buying Experience Balance Appearance Technology	Small Groups Experiential Simplicity Ecology newspapers
Key Markets	New York, NY Washington et al, DC Chicago, IL Boston et al, MA-NH	New York, NY Chicago, IL Philadelphia, PA Detroit, MI	New York, NY Chicago, IL Philadelphia, PA Boston et al, MA-NH	New York, NY Chicago, IL Boston et al, MA-NH Philadelphia, PA

Source: http://www.tourism.gov.on.ca/english/research/travel_activities/index.html

ACTIVITIES DURING OVERNIGHT TRIPS IN 2004-2005	% of Canadians travellers for whom this activity motivated some of their trips	% of US travellers for whom this activity motivated some of their trips
Performing Arts	17%	15%
Exhibits, Architecture, Historical Sites	17%	18%
Festivals and Events	16%	15%
Shopping, Dining, and Food	16%	14%
Visited national, provincial, state nature park	11%	10%
Fishing - fresh water	10%	6%
Hiking- same day excursion while on overnight trip	5%	4%
Motor boating	4%	2%
Kayaking or canoeing – freshwater	4%	2%
Ice fishing	3%	1%
Cycling - same day excursion	3%	1%
Golfing - played an occasional game	3%	2%
Hunting big game	3%	3%
Ice-skating	2%	<1
Cross country skiing	2%	1%
Snowmobiling - day use on organized trail	2%	1%
Golfing - played during a stay at a golf resort	2%	2%
Sailing	1%	1%
Snowmobiling - as an overnight touring trip	1%	<1%
Cycling - mountain biking	1%	1%
Golfing - package golf tour to play on various courses	1%	1%
Hunting small game	1%	1%
Scuba diving in lakes / rivers	n/a	0.2%

Experience	Descriptor and Market Data	
Outdoor Activists (such as Divers, Cyclists)	Percent of Travelers (Canada): Average Age: Dominant Age Range: Household Income: Post-Secondary Education: Occupation Status: Dominant Life Cycle Stages:	5.4% 32.9 years 18 – 45 \$51,700 68% University / College 10% Advanced Degrees 68.6% Employed 11.8% Self-employed Young singles Young couples Young families
Golfers	Percent of Travelers (Canada): Average Age: Dominant Age Range: Household Income: Post-Secondary Education:	5% 48.1 years 26 – 65 \$80,500 74.5% University / College 12.9% Advanced Degrees

	Occupation Status: Dominant Life Cycle Stages:	52.8% Employed 20.8% Retired Senior couples Mature couples Young families Mature singles
Anglers / Hunters	Percent of Travelers (Canada): Average Age: Dominant Age Range: Household Income: Post-Secondary Education: Occupation Status: Dominant Life Cycle Stages:	5.1% 42.% years 26 – 55 \$53,500 46.4% University / College 6.4% Advanced Degrees 55.8% Employed 14.7% Self-employed Mature families Young families Mature couples
Boaters	Not available	
Scuba Diving	Not available	

Source: Travel Attitudes and Motivations of Canadian Residents, March 2007 and Travel Attitudes and Motivations of US Residents February 2007

Most of Brockville and District's core and supporting experiences are not available on a year-round basis and therefore do not provide opportunities to extend traditional peak travel times into the shoulder seasons.

Quality and Critical Mass

This 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
- Entertainment, dining, and shopping.

The evaluation process has assessed the size of Brockville and District's activity and amenities base and the quality of its entertainment, dining and shopping offerings.

Brockville and District does not offer visitor experiences that are considered to be memorable. The area offers a variety of different activities and attractions, however the points of interest are spread out and transportation by private car is required. Brockville and District's offering of core attractors and on-theme activities do not generate visitation for periods greater than 24 hours. With the exception of scuba diving, experiences do not require guests to stay overnight in the destination as detailed in the activity chart:

Activity	Duration
Cruise	3-5 hours
Scuba Diving	1-2 days
Fishing	1-2 days
Festivals & Events	3-5 hours
Museums / Historic Sites	1-2 hours
Boating	1-2 days
Shopping	1-2 hours
Tours / Excursions	1-4 hours

*Source, PRTD Industry Survey, 2006

Brockville and District's core and on theme experiences for the most part are not available on a year-round basis and therefore do not provide opportunities to extend traditional peak travel times into the shoulder seasons.

Activity	Season
Historic Sites	Year-round (Limited hours Sept.-May)
Boating	Late Spring, Summer, early Fall
Boat Cruises	Late Spring, Summer, early Fall
Fishing	Year Round
Sightseeing	Spring/Summer/Fall
Scuba Diving	Summer/Fall
Festivals & Events	Spring/Summer/Fall
Shopping	Year-round
Culture Performing Arts	Year-round

Source: PRTD Industry Survey, 2006

Brockville and District's product offering are not easily accessed or purchased from outside the region. Accommodations can be pre-arranged; however tickets or admissions to attractions, tours, cultural and recreation events or activities need to be booked on-site. There is a central website for the destination with a list of activities where a visitor could pre-plan an itinerary.

Brockville and District's products and experiences are available to visitors at a variety of price points, the range being from free to \$75.

Activity	Approximate Price Range
Cruises	\$14 - \$24
Scuba Diving	\$25 - \$75
Festivals & Events	Free - \$20
Culture Performing Arts	\$20 - \$50
Museums	Donation to \$5

Source: PRTD Industry Survey, 2006

Brockville and District offers visitors a range of activities encompassing a variety of price points and layers of added value. These activities include product experiences that provide opportunities for relaxation, entertainment, interpretation, education, cultural / historic understanding, skills development and adventure. The range of these activities is promoted. Promotions include print and broadcast media, attendance at trade and consumer shows, publication and distribution of a travel guide and brochure distribution through tourist offices, hotels and attractions.

Category	Activity	Approximate Price Range
Relaxation	Fishing	Free - Full charter
	Parks and Trails	Free - \$5.90
	Cruises	\$14 - \$24
	Shopping	
Entertainment	Cruises	\$14 - \$24
	Festivals / Events	Free - \$20
	Golf	\$14 - \$36
	Parks and Trails	Free - \$5.90
	Shopping	

Interpretation	Museums Historic sites Parks and Trails	Donation - \$5 Free - \$5 Free – \$5.90
Education	Museums Specialty Shops Tours	Donation - \$5 Free
Cultural / historical understanding	Museums Art Centres - Performances Historic Sites Farmers Markets Antique shopping Historic / Cemetery tours Studio / House and Garden Tours	Donation - \$5 \$8 - \$50 Free - \$5 Donation - \$2 Free to \$20
Skills development	Scuba Diving Golf Cross Country Skiing	\$25 -\$75 \$14 - \$36 Free - \$5
Adventure	Scuba Diving ATV Rides Fishing Hunting Boating Canoeing / Kayaking Parks and Trails	\$25 – \$75 \$25 -\$80 Free – Full charter Guided packages Free – Rental \$30-\$40/day Free – \$5.90

Source: PRTD Industry Survey, 2006

Communities within Brockville and District do not animate public spaces to generate interest or excitement in places local residents and visitors congregate. The exception is during periods when festivals and events take place.

Brockville and District offers a variety of cultural and entertainment experiences and feature well known performers and artists. They are available at a variety of price points throughout the calendar year. Recently the Brockville Arts Centre took summer pre-packaged programs to the market with 3 show times offered every other week.

Events	Artists
Brockville Arts Centre	Rita MacNeil, Blue Rodeo, Randy Bachman, Lorne Elliot, Great Big Sea
Joshua Bates Centre	Nils Ning, Cadence, George Fox, Rod Beattie, David Francey, Evans & Doherty, Lorne Elliot

Source: PRTD Industry Survey, 2006

Brockville and District offers a selection of dining experiences however few have name recognition outside the area, feature well known accredited chefs and none offer a wine list with more than 25 labels.

In terms of retail shopping experiences, Brockville and District has a variety of high-end to main stream retailers. Some are independently owned who offer a unique selection of merchandise. Some also have name recognition beyond the region.

Store	Quality of Merchandise (Bargain, Average, or High)
Alan Browns of Brockville Ltd.	High End
Casual Living Patio Plus	High End
Creative Goldsmith and Diamond Merchant	High End
Dream Weaver	High End
Hands Home Furnishing	High End
Harringay Ent. Ltd	High End
Heritage Clock Shop	High End
Limestone and Ivy	High End
Mary Kay Shoppe	High End
Palko Jewellery Design	High End
Reilly's Furs	High End
Sugold	High End
Pauline's Lingerie	Mainstream/Average
Balleycanoe Co.	Mainstream/Average
Cranks Bicycle Shoppe	Mainstream/Average
Dad's Gone Fishing	Mainstream/Average
Dovetails & Square Nails	Mainstream/Average
House of Flowers	Mainstream/Average
Lakeside Bait	Mainstream/Average
Leeds County Books	Mainstream/Average
Mike's Trail and Tackle	Mainstream/Average
Yesteryear Shoppe	Mainstream/Average
Scott's Discount	Bargain/Discount
Liquidation World	Bargain/Discount
Seaway Treasures	Bargain/Discount

Source: PRTD Industry Survey, 2006

Those retailers who have name recognition outside the local area of region include:

<i>Alan Browns of Brockville Ltd.</i>
<i>Balleycanoe Co.</i>
<i>Cranks Bicycle Shoppe</i>
<i>Dovetails & Square Nails</i>
<i>Harringay Ent. Ltd.</i>
<i>Heritage Clock Shop</i>
<i>Leeds County Books</i>
<i>House of Flowers</i>
<i>Seaway Treasures</i>
<i>Yesteryear Shoppe</i>

Source: PRTD Industry Survey, 2006

Satisfaction & Value

This section documents the extent to which Brockville and District offers its guests:

- *A warm welcome*
- *Satisfies expectations*
- *Offers value for money.*

The evaluation process has identified how guests and outside marketers view the region against these attributes. It also evaluates how Brockville and District is investing in improving performance in these areas.

Brockville and District Chamber of Commerce does conduct an annual visitor survey at a variety of locations throughout the area during peak tourist season. While the sample size is small it is sufficient enough to determine that guests feel welcomed. The 2006 visitor surveys were conducted from July 5 to August 28 by five Summer Tourism Ambassadors. A total of 277 surveys were completed at 2 locations: Tourism Office (48/17%) and Blockhouse Island (229/83%). See Appendix 2

Through industry consultations and peer to peer feedback it appears providing acceptable levels of service and offering value for money may not be an issue. While there is not currently a means of consistently monitoring satisfaction indicators, visitors have several means to comment on their visit including the Brockville and District Tourism Office Guest Registry, the Brockville and District Tourism Office Visitor Survey and the Forwarder Museum and Visitor Centre Guest Registry, their comments tend to be very positive. In addition, the Downtown Brockville’s First Impressions Report of 2006 assessed the community as welcoming, visually appealing and having friendly staff to assist visitors.

One indicator to support this notion is that key experience and service price points are staying the same or trending upwards. In addition, visitation numbers are trending upwards for most tourism experiences especially those that are niche in nature. Therefore, one might conclude that guests are receiving some degree of value for money and are receiving acceptable levels of service and hospitality.

Key Experience or Service	Current Price	Trend
1000 Islands Cruises	\$14 - 24	Up
St. Lawrence Islands National Park	\$5.90	Flat
National Historic Sites	\$3-5	Flat
Fishing Charters / Guided Hunting	Not available	Up
Scuba Diving	\$25 - 80	Flat
Average Room Rate (Jan – June 2006)	\$91.72	Up
Restaurants	\$8.25 average	Up

Source: PRTD Industry Survey, 2006

- Adventure activities such as diving and ATV tours are trending to increased visitation – this is independent of the price which is trending flat.
- Visits to historical sites are trending flat or decreased visitation - this is parallel to prices which are trending flat.
- Fishing and Hunting operators are experiencing increased visitation – this is parallel to prices which are trending up.
- Cruise operators are experiencing decreased visitation – this is independent of price which is trending up.

Note: Niche markets activities are experiencing increased visitation, but mass market activities are experiencing flat and/or decreased visitation

Source: PRTD Operator Survey, 2006

Accessibility Rating

This section assesses:

- *The ease of getting to and traveling within Brockville and District*
- *The transportation modes that serve it*
- *Waterfront communities, “friendliness” to cruise ships or boat passenger*
- *The importance of transportation to the tourist experience.*

The evaluation process has identified how accessible Brockville and District is and how well that accessibility is being managed.

There are more than 11.4 million people living within a 3 hour radius of Brockville and District. Proximity to two international air gateways, Ottawa International Airport and Pearson International Airport in Toronto is very good. There is a regional airport within a 15 minute drive, Brockville-Thousand Islands Regional Tackaberry Airport.

Population Within a 3 Hour Radius	
Montreal QC (CMA 2006)	3,720,000
Cornwall ON (MA 2001)	57,581
Ottawa ON (CMA 2005 est.) includes Gatineau QC	1,146,790
Kingston ON (MA 2001)	146,838
Belleville ON (MA 2004)	88,025
Cobourg ON (City 2001)	17,172
Port Hope ON (City 2001)	15,605
Peterborough ON (City 2004)	74,600
Oshawa ON (MA 2004)	296,298
Watertown NY (City 2000)	26,705
Syracuse NY (MA 2000)	732,117
Toronto ON (CMA 2006)	5,113,149
Total	11,434,880

Source: Stats Canada, 2006

For visitors who travel to Brockville and District by automobile or motor coach the drive is pleasant and achievable with minimum effort. The commonly used routes are:

Montreal	40 and 401 west
Toronto	401 east
Ottawa	416 south and 401 west
USA	NY 812 to the Ogdensburg-Prescott International Bridge which becomes Provincial Route 416 to the 401 west
	NY 81 to the Thousand Islands Bridge where it becomes Provincial Route 137 to 401 east

There are a variety of modes of travel available to reach the destination. While most travel is done in personal vehicles the area is serviced well by regularly scheduled train (VIA Rail), and motor coach operators.

The destination is not accessible to cruise ships and does not have docking facilities adequate to accommodate this mode of travel. The Port of Brockville requires a site review to achieve the business of large cruise ships. Brockville and Prescott are currently not ISPS Certified.

Brockville Municipal Harbour	3 metres draft 365 metres seawall
Sandra S. Lawn Harbour (On channel docking at Prescott Main Dock)	6 metres draft 76 metres dock wall for cruise ships
Port of Brockville (Deep water docking and mooring at Centeen Park)	3.5 to 9.7 metres draft 137 metres dock wall

Brockville and Prescott does not offer sufficient slips for visitor boaters (24). Those that are offered are located within walking distance to visitor services and tourism experiences.

The Transportation Check List has been completed and 8 Yes's (six or less = non compliance) have been recorded which assumes the destination can safely say it has consulted with transportation resources and provides fundamental transportation services. See *Appendix 1*

Accommodation Base

This section assesses the breadth and depth of the Brockville and District's offering in terms of:

- *The range of accommodation classes available*
- *Their location*
- *The presence of higher end operators.*

The evaluation characterizes the region's accommodation base.

Brockville and District offers visitors limited accommodation options with a total of 599 roofed guest rooms at a variety of price points most are not within close proximity (walking distance) of core attractors. The region has 91 RV sites.

Class	# of Properties	# of Rooms/Sites	Price Range
RV Park	5	91	\$20 - 27
Bed & Breakfast	19	49	\$65-145
Lodge	0		
Resort Lodge/Hotel	0		
Motel – Independent (Privately Owned)	8	403	\$50-200
Motel - Chain	0		
Hotel – Independent (Privately Owned)	2	147	\$50-200
Hotel - Chain	0		

Source: PRTD Operator Survey, 2006

The accommodation inventory includes “branded” well known chains*. These include Best Western, Comfort Inn, Days Inn, Quality Inn and Travelodge.

PERFORMANCE

Evaluation Rating for Brockville and District ○

The **Performance** measures identify the extent to which Brockville and District is successful and recognized in the marketplace. By comparing Brockville and District'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.

Visitation

This section assesses Brockville and District's market performance in terms of visitation numbers and market share, attractiveness to different market segments, and times of year.

NOTE: The data listed below is from the 2004 CTS/ITS Survey and includes numbers for the United Counties of Leeds Grenville which includes but is not limited to Brockville and District.

In 2004 the United Counties of Leeds Grenville attracted a total of 1,932,393 guests. Of these 690,332 (36%) stayed overnight and 1,242,062 (64%) were day visits.

Between 1998 and 2004, person visits decreased by 23%, from 2,507,778 to 1,932,393, visits by Canadians decreased by 36%, from 1,799,726 to 1,144,219 while visits by US residents increased by 17%, from 633,075 to 743,743. Person visits by residents of other countries decreased by 41% from 74,977 to 44,432.

Of the 690,332 overnight visitors, 431,257 (62%) were on pleasure trips, 191,044 (28%) were traveling to visit friends and relatives, 27,904 (4%) were on a business trip and 6% were travelling for unknown reasons.

Leeds Grenville attracted 383,787 (56%) of its overnight visitation from the Ontario market. The strongest Ontario markets for overnight visits were Ottawa Carlton (15%), Toronto (5%) and Frontenac (4%). Other Canadian provinces represented 32,663 (4%) of visits. The US market represented 244,179 (35%) of overnight visits. The strongest US markets were Pennsylvania and New York which each represented 12% of total overnight visits. Visitors from other countries represent 29,702 (4%) of overnight visits.

Overnight visitors spent 2,276,788 person nights in Leeds & Grenville United Counties, with 745,947 (33%) of these nights in roofed commercial lodgings such as hotels, motels, resorts, B&Bs and commercial cottages. 361,194 (16%) person nights were spent in local campgrounds or trailer facilities and 882,253 (39%) person nights were spent in private homes or private cottages.

Of the 745,947 person nights in roofed commercial lodgings, 29% were spent by residents of the province, 2% were spent by residents of other Canadian provinces and 69% were spent by international visitors (66% Americans; 3% other countries).

83% of the overnight visitors were travelling in adult-only parties and the remaining 17% were travelling with at least one individual fifteen years of age or younger. The average party size for overnight visitors was 2.0 (including children).

Visitation/Spending 2004	Ontario			Leeds and Grenville		
	Total	Same Day	Overnight	Total	Same Day	Overnight
Total Person Visits (All Flows)	118,284,236	71,612,018	46,672,218	1,932,393	1,242,062	690,332
% Market Share				1.6%	1.7%	1.5%
Origin						
Canada (Total)	94,843,493	57,347,560	37,495,933	1,144,219	727,769	416,450
USA (total)	21,391,369	13,957,359	7,434,010	743,743	499,564	244,179
Overseas (Total)	2,049,374	307,099	1,742,275	44,432	14,730	29,702
Visitor Spending						
Total Visits	\$17,080,681,498	\$4,474,312,938	\$12,606,368,560	188,744,895	\$55,296,466	133,448,429
% Share of Total Spending				1.1%	1.2%	1.1%
Visitor Spending by Canadians	\$10,356,111,584	\$3,273,125,717	\$7,082,985,867	\$76,472,913	\$19,861,008	\$56,611,905
Visitor Spending by Americans	\$4,383,216,921	\$1,058,425,868	\$3,324,791,053	\$102,434,903	\$34,703,956	\$67,730,947
Visitor Spending by Overseas	\$2,341,352,992	\$142,761,353	\$2,198,591,639	\$9,837,079	\$731,502	\$9,105,577

Source: CTS/ITS Statistics 2004

The following chart compares pertinent visitor statistics of Leeds Grenville with other counties within close proximity to Brockville and District;

Competitive Comparisons - 2004	Ontario	Leeds Grenville	Ottawa Carlton	Hastings County	Prince Edward County	Lanark County	Frontenac County
Total Person Visits (Weighted)	118,284,236	1,932,393	7,498,345	2,096,853	435,272	897,877	2,645,045
Length of Stay in Region							
Same-Day	71,612,018	1,242,062	3,965,982	1,229,769	201,503	551,611	1,461,471
Market share - Day visits		1.73%	5.54%	1.72%	0.28%	0.77%	2.04%
Overnight	46,672,218	690,332	3,532,363	867,084	233,769	346,266	1,183,574
Market share- Overnight		1.48%	6.40%	1.86%	0.50%	0.74%	2.54%
Market share – total visits		1.63%	5.90%	1.77%	0.37%	0.76%	2.24%
Spending							
Total Spending Assigned to Region for Visits in Region	17,080,681,498	188,744,895	1,171,838,677	158,968,392	36,203,533	55,481,301	335,848,552
Total Spending Assigned to Region for Same-Day Visits in Region	4,474,312,938	55,296,466	221,137,945	38,968,463	3,578,378	22,642,566	78,910,147
Average Spending Per Person Per Night	84.45	62.96	66.22	49.61	52.92	33.47	68.86
Average Spending Per Person Per Same-Day Visit	62.56	44.52	55.76	31.69	17.76	41.05	53.99
Total Spending Assigned to Region for Visits in Region & Residents Leaving Region	21,378,861,672	230,624,777	1,766,488,960	215,343,010	64,788,957	80,382,880	404,552,944
Market share - total spending		1.60%	6.30%	1.80%	0.40%	0.80%	2.20%

Source: CTS/ITS Statistics 2004

In the year 2004, visitation which included the activities identified below, represented the stated shares of all trips in Ontario which included the same activities:

- 159,637 or 3% of the 5,390,529 trips in Ontario which included National/Provincial Nature Parks
- 178,983 or 4% of the 4,989,036 trips in Ontario which included Historic Sites
- 108,079 or 4% of the 4,575,108 trips in Ontario which included Boating
- 66,624 or 2% of the 3,225,712 trips in Ontario which included Festivals/Fairs
Source: CTS / ITS, Statistics Canada, 2004.

Destination share vs. competitor share of activity:

- 8% vs. 28 % share of Historic site-oriented trips to Niagara Region
- 8% vs. 19 % share of National/Provincial Nature Park trips to Niagara region
- 7% vs. 5 % share of the Boating-oriented trips to Ottawa region
- 7% vs. 13 % share of the Festivals/Fairs-oriented trips to Ottawa region.

Meetings and Convention business is not significant at 139,268 trips this represents 6% of total M&C trips to Ontario.

Occupancy & Yield

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

Leeds and Grenville's commercial accommodation occupancy in 2005 was 61.8%; this is below the provincial average of 65%. The average daily rate was \$88.04, and Rev Par was \$54.00.

Source: PKF, 2005

In 2004, the average per person per night spending for overnight visitors to Leeds & Grenville United Counties was about \$63. Overnight visitors from Ontario spent approximately \$51 per person per night in the area; those from USA spent about \$70 per person per night; and those from other countries spent approximately \$83 per person per night. The average expenditure for guests on day trips was \$44.52 compared to \$62.56 average for Ontario. Overnight guest spend on average \$190.82 compared to \$270.27 average for Ontario.

Total spending by guests on day trips was \$55,296,466. Total spending by all tourists on day trips in Ontario was \$4,474,312,938; the destination's share of total spending by these tourists was 1.2%. Guests on overnight trips spent \$133,448,429, total spending by all tourists on overnight trips in Ontario was \$12,606,368,560, and the destination's share of total spending by these tourists was 1.1%.

Visitation to the destination is similar to most in Ontario with peak travel taking place in the 2nd and 3rd quarters.

2004 Visitation

QTR. 1	QTR. 2	QTR. 3	QTR. 4
12%	29%	38%	21%

Source: 2004 CTS / ITS, Statistics Canada

Critical Acclaim

This section addresses the extent to which Brockville and District is recognized as a must-see destination, if it 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 Brockville and District is recognized as standing out from its competitors.

Brockville and District is not considered a “must see / must do” destination. That being said niche market activities such as diving and angling / hunting are very attractive to those who participate in these activities and could be considered “must see / must do”.

The destination has a few experiences that have been ranked as “Number 1,” “Best in Class” or “top tier.” This is particularly true in terms of the notoriety of the diving experiences available. Images of Brockville and District are also used in OTMP and CTC advertising from time to time.

FUTURITY

Evaluation Rating for Brockville and District ○

***Futurity** identifies the extent to which Brockville and District is investing in its future as a place with viable and continuing attractiveness to evolving markets. It includes the activities in place to raise awareness for the destination as well as the degree in which new investment in the form of capital dollars will be made to enhance its product offering. It also determines its capacity in a number of physical measures such as infrastructure.*

The ability for a destination to thrive from tourism into the future is sustained by:

- *Destination Marketing*
- *Product Renewal*
- *Managing within Carrying Capacities.*

Destination Marketing

This section identifies to what extent Brockville and District:

- *Targets viable markets*
- *Invests in managing and promoting its tourism marketplace*
- *Consults with the travel trade serving the region.*

The evaluation identifies if Brockville and District is actively matching its product to the expectations of the tourism marketplace and is taking advantage of the knowledge of its travel trade customers.

There is a market demand for the Brockville and District's type of offering. This demand is demonstrated in the March 2006 Travel Attitude and Motivation study:

Activity	Percentage of travelers for whom this activity motivated some of their trips
All Water-Based Activities	33%
All Performing Arts	17%
All Festivals and Events	16%
All Shopping	16%
Visiting National, Provincial Parks	11%
Fresh Water Fishing	10%
Live Theatre	5%
Museums, General History or heritage	4%

*TAMS 2006, Travel Attitude and Motivation Study, Ontario Ministry of Tourism

Within Brockville and District there are several Destination Marketing Organizations (DMOs) that are involved in visitor services, implementing forms of tourism marketing on a regional, provincial, national and international scale. The lead organization or DMO is the Brockville and District Chamber of Commerce. Other DMO's can be found in Prescott and Athens but currently have no formal communication links.

None of the organizations have sufficient funding to effectively target potential markets and market their respected destinations. Communications represents 41% of Brockville and District Chamber of Commerce's \$428,913, 2006 operating budget.

The DMO does have an annual marketing plan and tracks to a certain extent the effectiveness of its marketing efforts. The Brockville and District Chamber of Commerce Visitor Survey asks a question regarding what influenced the choice of destination. In the 2006 survey, 45.5% of visitors indicated that their choice of destination was influenced by the destination's marketing communications efforts.

Brockville and District Chamber of Commerce has a tourism strategic plan that has some focus on aspects of destination development. Other communities within the district currently do not have specific tourism plans although tourism is spoken about around various council tables. The Brockville and District Tourism Plan includes strategies pertaining to:

1. Destination and Experience Development

- Support the 1000 Islands & St. Lawrence River Partnership to continue increasing the profile of the 1000 Islands Region as an international icon.
- Work closely with the Ontario Ministry of Tourism through the Premier-Ranked Tourist Destination Framework to identify unique strengths and experiences, natural assets and underdeveloped tourism opportunities. Collaborate in the development of a regional report for the 1000 Islands and St. Lawrence River.
- Support the alignment of area industry efforts and a more strategic approach to tourism development.
- Actively support the Anchor Attraction Steering Committee (TAASC).
- Support the sustainability and evolution of current and new festivals and events.

2. Partnerships and Resource Development

- Position Brockville and District regionally to maximize future opportunities.
- Source agencies to take advantage of funding programs.
- Develop a partnership structure to support the advancement of tourism development and marketing with local stakeholders and government support.
- Research and implement new revenue generation programs to support current and additional resources.

3. Visitor Focused

- Facilitate customer service training for front-line staff to ensure visitors receive quality experiences.
- Recognize and encourage quality visitor focused initiatives and service excellence.
- Research and identification of travel motivators that trigger repeat visits.
- Develop strategies to work with operators on identifying visitor motivations, expectations, satisfaction and repeat business.
- Develop a general community strategy to provide welcoming faces to visitors in all areas of interaction - taxi, accommodations, maintenance crews, etc.

4. Strategic Marketing

- Develop a multi-media campaign that reflects the Brockville and District brand and current trends.
- Complete Brockville and District Tourism Brand Exercise to strategically position Brockville as a destination of choice.
- Develop strategic marketing partnerships with government and tourism related organizations and businesses.
- Expand the Brockville merchandise program to provide keepsakes to complement the visitor experience and local pride.

5. Image and Awareness

- Develop a public awareness campaign on how tourism contributes to our economic and social development and the quality of life found in the region.
- Advocate the need for tourism growth for economic diversity to government, investors and business decision-makers.
- Provide recommendations to Chamber Board on policy position statements that affect the tourism industry.
- Host tourism market readiness workshops organized by the Ministry of Tourism.
- Monitor and measure economic impact of tourism.

There is a program in place to monitor progress in reaching the stated objectives and The Brockville and District Tourism Office reports monthly to the Brockville and District Chamber of Commerce Tourism Advisory Committee and presents semi-annually to the City of Brockville Council.

While customer service training is viewed as important, little or no region-wide initiatives are in place. Individual businesses conduct tourism hospitality or service training but there is a gap in delivering consistent quality training to front line hospitality workers.

Product Renewal

This section identifies the extent to which Brockville and District is making capital investments in its attractiveness into the future. The evaluation documents the status and magnitude of Brockville and District's investment in the future.

In the past five years \$8,974,200 has been invested in facility renewal and/or expansion and development with an emphasis on products that are directly or indirectly associated with tourism. 74% of this investment has occurred in the last two years.

Location / Business Category	Investment (\$)	Percent in Past 2 Years
Accommodations	\$1,516,800	96%
Adventure Activities	\$544,000	49%
Attractions	\$1,000,600	100%
Food and Beverage	\$360,000	17%
Festivals and Events	\$82,800	69%
Golf	\$120,000	42%
Marina	\$35,000	43%
Parks and Trails	\$235,000	81%
Retail	\$5,051,500	70%
Tours and Excursions	\$13,500	100%
Winery/Brewery	\$15,000	100%
Total	\$8,974,200.00	70%

Source: PRTD Operator Survey, 2006

Note: 50% of the historical attraction survey respondents reported no capital investment in the past 5 years. Of the figures provided, the capital expenditure is almost entirely attributed to Fulford Place's major renovations.

Managing Within Carrying Capacities

This section assesses the extent to which Brockville and District is aware of, and manages within, its capacity thresholds specifically its;

- *Local economy*
- *Ecosystems and soft services infrastructure*
- *Its guest's satisfaction levels*
- *Hard services infrastructure*
- *Administrative systems.*

The evaluation documents Brockville and District's ability to manage systems that sustains it.

Tourist visits to Brockville and District make a net positive contribution to the local economy. The \$188,744,895 in spending by all visitors to Leeds and Grenville generated over \$131,929,000 in direct, indirect and induced contributions to gross domestic product (GDP), \$67,999,000 of labour income and salaries and, 2,449 part-time, full-time and seasonal jobs. Total taxes generated as a result of visitor spending in Leeds and Grenville reached \$81,055,000 including \$4,083,000 in municipal taxes.

Source: CTS / ITS, Statistics Canada, 2004

Large areas of the destination are rural and the economic impact from tourism is centred where the bulk of the businesses are located in the City of Brockville and the Town of Prescott.

In some destinations growing tourism visitation impacts the local resident's cost of living; this is not the case in Brockville and District. Housing costs have not risen in the region due to a growing tourism market. Nor would increased visitation threaten the visitor experience, so overcrowding and overuse are not being cited as reasons not to visit Brockville and District. Traffic congestion and parking may be an issue during peak travel times especially when festivals take place.

It appears some labour issues exist in Brockville and District. Semi skilled labour is not readily available to work in the industry. The City of Brockville 2006 Community Profile (Section C) and the South Grenville Community Economic Profile (Section 5) support this. Respondents* to the PRTD Survey (56%) however indicated there is a sufficient pool of trained labour to support their operation over the long term.

*Note: The tourism industry in the area may be strongly leaning on student labour during the high season. There may be a shortage of labour in regard to some skilled seasonal jobs such as boat captains.

Managing the carrying capacities of the natural systems that sustain local ecosystems and quality of life are well understood and monitored, this is described in:

- Frontenac Arch Biosphere Business Plan 2005 – 2008
- St. Lawrence Islands National Park Ecosystem Monitoring Programme
- Cataraqui Region Conservation Authority Resource Management (web site)
- SOS Website (www.saveontarioshipwrecks.on.ca)
- Leeds, Grenville and Lanark District Health Unit (web site).

It appears the destination understands its futurity specifically related to water treatment and delivery capacity, sewage treatment and trunk capacity:

- Prescott and Cardinal own and operate piped municipal water systems. These systems are sufficient for current needs and future growth.
Source: South Grenville Community Economic Profile Sect 7.4.
- United Counties of Leeds and Grenville Groundwater Management Study June 2001, Application of Results and Future Direction
Source: http://www.ene.gov.on.ca/envision/water/groundwater/leeds_grenville/index.htm and related links

Some municipalities have responded to the need to protect groundwater sources in their official plans by specifying housing density, lot sizes and industrial development zones:

- Brockville has identified a need to increase spending for infrastructure needs of the city's water and sewer systems.
Source: Recorder and Times February 6, 2007.
- Cardinal has delayed installation of water meters although it is stated there is some urgency to the matter.
Source: Recorder and Times February 6, 2007

Outside of Brockville, Prescott and Cardinal, which are supplied by surface water there is limited water supply infrastructure. (Brockville supplies water to a defined area of Elizabethtown-Kitley). Water is supplied primarily by ground water from private wells. This impacts tourism operators, especially those operating restaurants and accommodations who must respond to changes in legislation regarding water quality.

In terms of road, transit, parking and trail capacity and the environmental effects of infrastructure expansions some issues do exist and are having negative effects on the environment. These include:

Area	Impact
St Lawrence Islands National Park	Widespread / ongoing ecological impacts
Charleston Lake	Species at risk
Beaches	Variety at peak periods

PRTD Industry Survey, 2006

Where the environment or quality of life are at risk or are being impaired, a plan to resolve the problem is being implemented; this is demonstrated in the following reports:

- St. Lawrence Park Ecosystem Management Goals
- Mac Johnson Wildlife Area Master Plan
- Cataraqui Region Conservation Authority Strategic Plan
- Charleston Lake Plan
- Thousand Islands Parkway Study Final Report.

Several towns and townships have tourism in their Official Plans and have tourism related objectives and policies in place. These include:

- Front of Yonge Township's Official Plan & Economic Policy encourages support of its existing tourism and recreation base
- Elizabethtown-Kitley Official Plan mentions land use to foster economic growth and diversification including opportunities for home-based and tourism-based business
- The Anchor Attraction Report details recommended objectives and policies for the downtown and waterfront area in Brockville
- Township of Augusta Official Plan mentions support of land use to create tourism and home based business such as B&Bs
- Town of Prescott Official Plan recognizes the importance of promoting tourism.

INTERPRETATION - SUMMARY OF FINDINGS

At the outset of the report a measurement criteria was described that rates the destinations status related to its performance for its product, performance and futurity dimensions. After completing the Destination Performance Summary using the data provided through industry surveys and supplementary information 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.

▶ Almost - 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.

○ No, the affirmation cannot be made or supported for the destination

FUTURITY - The ability for a destination to thrive from tourism into the future is sustained by:

- Destination Marketing
- Product Renewal
- Managing within Carrying Capacities.

○ No, the affirmation cannot be made or supported for the destination

While positive affirmations cannot be made for all three of these measurement criteria Brockville and District **has potential to improve**. Both Brockville and District Chamber of Commerce and the tourism industry stakeholders should be encouraged that the PRTD work has been completed and it has revealed gaps in the tourism offering but it also offers clear direction for improvement. It supports the premise that Brockville and District has the opportunity to develop and emerge as a viable destination in the very near future.

OBSERVATIONS

- The work completed indicates that a formal tourism product development strategic action plan must be initiated to determine the priorities of the destination. The Anchor Attraction Report, the Maritime Discovery Centre proposal and the Premier-ranked Report will need to be combined with a matrix of actions. In this process it would be determined “who does what” as it relates to destination development, some immediate work is needed to complete this task.
- Although the Chamber has taken a lead in both destination development and tourism marketing they are not adequately funded to impact travel to the destination in any significant way.
 - The destination does not have the needed resources to properly develop and then promote the destination in order to positively impact tourism receipts to the area and the individual tourism businesses within Brockville and District.
- The Anchor Report recommendations and the proposed Marine Discovery Centre, if adopted, would solidify the destination’s uniqueness and competitively position it in the tourism marketplace. The opportunities for Brockville and District are significant should the recommendations in the report be adopted and this visitor attraction becomes reality. Many destinations are looking for this kind of new attractor, one that not only has potential to attract visitors on its own but an attractor that complements attractors that already exist. In Brockville and District’s case that synergy exists because of the destination’s connection to history as it relates to the St. Lawrence River and the ships that have used it for many years.
 - Supporting attractors have potential to help position the destination as unique within the minds of potential visitors. Given the similarity to;
 - Scuba diving – as a water based historical attractor
 - Brockville Arts Centre and St. Lawrence Shakespeare Festival – as quality culture and entertainment offerings.
- Attractors must be clearly understood in terms of how they match what visitors are looking for, “you have what they want”. As an example, the 2006 TAMS Study* reveals that both Canadian and U.S. visitors desire to learn or better themselves, while visiting a destination. Brockville and District’s heritage and living history meets aspects of those who desire a learning vacation.
 - Attention must be directed to further develop attractors as overnight, year-round experiences; all have the potential to do this if presented as a cluster of experiences and combined with accommodations. Visitors are interested in heritage experiences, live theatre, and activities that are water based such as cruises, canoeing and sailing. The destination has these product attributes and it appears customers are visiting the destination to enjoy these activities. However, they are experiencing them in isolation, not as part of a larger experience. This is evidenced by low day trip expenditure numbers. The opportunity to take a cruise on the river as well as visit a heritage site or live theatre exists. Combine this with a hotel offering and the opportunity to extend length of stay and overnight accommodation increases throughout the calendar year.
 - Attractors clearly have potential to position and differentiate the destination, for example the “best fresh water diving” speaks to the appeal as a niche attractor but because of the shipwrecks found in the water of the St. Lawrence River that divers are interested in exploring reinforces the destination as a place of historic significance even if everyone is not a diver.

- Attractors are underdeveloped and/or underperforming, either they need attention to become market ready or they need to be presented to a wider audience in order to increase visitation. As an example, the St. Lawrence River experience offers a wide variety of attractive features that are of interest to particular visitors. Things like canoeing and kayaking have appeal yet the destination has not developed these assets to the fullest extent to be market ready nor has the destination packaged these experiences in order to make it easy for someone to purchase. Therefore this aspect of the attractor is underperforming and underdeveloped.

Source: TAMS 2006, Travel Attitude and Motivation Study, Ontario Ministry of Tourism

- Day and overnight trip expenditures are well below provincial average, therefore, steps must be taken to extend the length of stay of both of these important visitor market segments. This can be accomplished by:
 - Extending length of stay in the destination
 - Leveraging the significant number of trips that originate as a result of the visiting friends and relatives (VFR) market segment
 - Ensure visitors have the information they need, when they need it to plan their trip, for example, the Ontario Visitor Centre is not open year-round.
- It is unknown if the destination delivers good service and value for money.
 - An enhanced visitor survey needs to be implemented, that includes the components of the existing survey but also captures guest experiences and perception of the destination.
- An opportunity exists to upgrade the service offering of the destination by delivering consistent training for all front line staff.
 - This begins by establishing a standard of service excellence among the owners and operators of the tourism businesses within Brockville and District.
 - The continuation of hospitality training utilizing the SuperHost programme is crucial to understanding the destination's long term quality and value for money ratings.
- Accommodation base is limited.
 - No higher end properties exist, most are mid-range or economy properties that service transient travellers who use Highway 401 in route east or west to Toronto or Montreal.
 - Few properties exist in the downtown or on the waterfront close to attractors. Although this may be a challenge due to land availability, the industry must strive to locate accommodations close to its primary attractors.
 - Downtown Brockville has potential to be a "centre of activity", its picturesque location and proximity to the river supports the opportunity for future development and animation. An active and vibrant downtown attracts business development, including retail and dining establishments. With this accommodators will follow.
- Importance of tourism is not widely understood and fully leveraged.
 - Most towns/townships mention tourism in their annual plans but it is not clear if they are committed to tourism development.
- A partnership strategy that positions Brockville and District as a collective of tourism experiences will help "spread the wealth" to the entire area.
 - The overall region has attractors and it should begin to communicate the breadth of experience available in order to establish marketing partnerships to attract more visitors to the area and create a *win, win* scenario.

PLANNING – RECOMMENDATIONS & ACTIONS

Based on the findings and observations the following recommendations have been developed in consultation with the Premier-ranked Steering Committee, the Brockville and District Tourism Advisory Committee and tourism stakeholders within Brockville and District. Immediate, mid-term and long term action steps have been identified.

Immediate – January – December 2008

- Brockville and District Chamber of Commerce, specifically the Brockville and District Tourism Advisory Committee takes responsibility for ensuring the recommendations contained in the PRTD Report are initiated.
 - This group should recommend a formal process to undertake the recommendations and determine who does what.
 - Brockville and District Tourism, as lead DMO, should also formalize communication links with all municipal agencies on topics related to tourism, North / South and East / West, in order to develop productive working relationships.
- Implement a process for the creation of a Brockville and District Tourism Destination Development Plan (ASAP) and incorporate the recommendations and course of action coming from Brockville's Anchor Attraction Report and Maritime Discovery Centre and Other Waterfront Enhancements Report.
 - This strategic plan builds on the existing plan and incorporates the recommendations identified in the PRTD report; this becomes the benchmark framework for destination development.
 - It will rally the industry with one focused approach to destination development as it is the future road map for tourism development in Brockville and District.
 - It must define the scope, prioritize the deliverables, secure funding/human resources to see the destination move forward in both the short and long term, initiate in winter/spring 2008.
- Support for the realization of the Maritime Discovery Centre.
 - A group of influencers are identified and charged with the responsibility to make this happen.
 - Developing the waterfront is fundamental to Brockville's future as a tourism destination as identified in Phase 2. The MDC and Phase 2 if done simultaneously will significantly enhance the immediate viability of the destination.
 - Tap into funding sources identified by the Ministry of Tourism's Investment Development Office (IDO) in order to help fund waterfront development.
 - IDO can assist Municipalities interested in attracting tourism investment by; providing information to support your business case or feasibility study; promote your investment case; and connect you with the investment community.
- Grow tourism development and marketing budgets through the introduction of a volunteer destination development / marketing fee by April 2008.
 - Create a Tourism Development and Marketing Partnership with the private sector to establish and collect these resources.
 - Many destinations, both large and small have successfully implemented such funding mechanisms; they include Toronto, Sault Ste Marie, Kingston and St Catharine's. The success has come as a result of establishing levels of trust among industry leaders and having clearly defined guidelines related to participation in the fund.

- Attention should be given to the work completed by the Railway Tunnel Committee. This heritage site, once developed, could have significant appeal to heritage visitors. The site is unique and it also supports other heritage attractors found in the destination. The nature of this attraction has cache. Typically it is these kind of attractions that appeal to travel writers, the unique nature of the railway tunnel and the significant role it played in the history of transportation on the St. Lawrence River are the things that interest writers. It is also the type of attraction that establishes top-of-mind awareness in the mind of the visitor.
- Introduce an annual visitor survey to track visitor experiences:
 - Initiate by August 2007 (underway)
 - Empower Chamber's, BIA's, tourism operators to regularly undertake the survey – 2 weekends per quarter
 - Track the findings and identify the areas of strength and areas where improvements are required based on visitor feedback
 - Communicate the findings to the industry.

Mid Term – January - December 2009

- Understand current travel motivations / behaviors of visitors as identified in the 2006 Travel Activities and Motivation Study and match these motivators with the products featured in the Brockville and District, as examples worth exploring:
 - Canadian and American leisure travellers are motivated by experiences that educate and inform. The heritage experiences available in Brockville and District provide an opportunity for this type of experience.
 - Water based outdoor experiences currently motivate travel. The destination's proximity to the St. Lawrence River and all it offers presents a significant opportunity to attract increased visitation.
 - Performing arts is a travel motivator. The Brockville Arts Centre has potential to motivate incremental travel if it presents an interesting and appealing variety of performances.
- Focus attention on the Underdeveloped and Underperforming Assets in the destination, for example:
 - Underdeveloped experiences:
 - Brockville and Prescott as ports for leisure boaters and Great Lakes / International cruise ships - conduct a port site review and develop a strategy for attracting a larger number of leisure boaters and international cruise boats, consider increasing number of transient boat slips and qualifying for ISPS Certification* (Kingston currently has this designation).

***ISPS Code Certification**

A new comprehensive security regime for International shipping and port facilities came into force in July 2004 following the adoption by IMO of the International Ship and Port facility Security Code (ISPS Code). This Code contains detailed security-related requirements for Governments, Port Authorities and Shipping Companies. The ISPS Code is compulsory for all passenger ships including passenger high-speed craft, cargo ships including high-speed craft of 500 gross tonnage and upwards and mobile offshore drilling units, engaged on international voyages and port facilities serving such ships engaged on international voyages. It may also be applied to any port facility, vessel and offshore unit on voluntary basis.

- Railway Tunnel as a future tourist icon associated with Brockville, the significant interest and appeal of this heritage attractions has the potential to draw a significant number of visitors because of its uniqueness and its role in the history of Brockville as a shipping centre in days gone by

- Ensure Municipalities (politicians and staff) understand that decisions on development and services for their citizens have potential to effect visitors positively or negatively, these are individuals corporately we hope to attract; increased awareness regarding the importance of tourism will help keep these decisions in a healthy context
 - Annually implement Tourism Inc. workshops on “market readiness” training for the tourism industry in order to improve and grow the knowledge base of operators so they can be as effective as possible at attracting and servicing future visitors
- Develop a Brockville and District product positioning statement and line and establish a brand that describes in consumer terms the product offering and experience that positions the destination as an attractive and interesting visitor destination today and in the future, secure 3rd party assistance to complete this branding exercise as part of the 2008 marketing strategy

Long Term - 2010 and Beyond

- Identify tactics to extend length of stay:
- Facilitate industry partnership through education, conduct workshops that encourage the packaging of tourism experiences among industry operators. For example the industry must bundle experiences, develop itineraries and take to market. These experiences must have an overnight component.
 - Currently the industry communicates with one another on a limited basis, the Chambers should create monthly networking sessions to promote dialogue between industry partners.
 - Open For Business – encourage tourism businesses to improve hours of operation daily and seasonally in order to maximize the experiences offered any given day and throughout the calendar year.
 - Tickets or admissions to attractions, tours, cultural and recreation events or activities need to be available to be booked online or at least through a toll free telephone line. Some do this already, and more businesses need to do this. The goal is to commit visitors to experiences when they are in the shopping mode, on a web site for example, as opposed to purchasing an experience once in the destination. If successful visitors are committed to visit and stay to enjoy the experiences purchased prior to arrival.
 - Develop key public spaces as landmarks and incorporate a community beautification plan into these areas to ensure on-going maintenance of the public space including provision of garbage and recycling facilities, convenient parking and bike racks.
 - Identify public washrooms throughout the destination, especially in Brockville and increase seasonality and hours of access to these facilities.
- Improve accessibility and way finding within the destination
- Currently visitors must have their own vehicle to travel within the destination; those who travel on their own to Brockville by train for example are restricted to visiting tourist sites and infrastructure close to the train station. Consideration must be given to attracting public/private sector solutions to this situation, improved shuttle service and taxi services for example. Route changes to Brockville Transit may partially fill this gap.
 - Ensure increases in traffic congestion, especially during events, is addressed by transit based interventions, e.g. public transit, shuttle services, people movers, satellite parking.
 - Increase signage on major tourist transportation routes to downtowns in order to make it clear for visitors to get to area attractions and town centres.
 - In order to better serve the lucrative motor coach market, improve on-site coach parking at attractions and / or provide sufficient coach staging areas to drop off and pick-up guests.
 - Create a tourism driver education segment as part of the “tourism awareness” training and ensure transportation providers like bus, shuttle and taxi drivers attend.

- Encourage long term improvements to Brockville's accommodation base including development of new properties and upgrades to existing properties.
 - Encourage investment in a downtown hotel(s) located close to attractors and waterfront.
 - Consideration should be given to adding an element to the Brockville Master Plan that identifies properties for new accommodation development. Properties have been identified for industrial development, similar properties should be allocated for potential accommodators, changes to zoning may also be required.
 - Consideration should be given to adding an element to the Brockville Master Plan that identifies properties for other tourism development, changes to zoning will be required.
 - Consider putting in place incentives to attract accommodation developers. These could include exemptions to development charges. (Norfolk County currently has been successful doing this)
 - Identify "best in class" properties in other destinations. Use these as examples in order to influence improvements to Brockville's properties. Recently considerable improvement and investment has been made to the accommodation base in the Town of Gananoque

- In Prescott attention should be given to the Official Plan as it relates to the comprehensive program of façade improvement, sensitive infill development, adaptive re-use, and streetscape upgrading to enhance the character of Downtown Prescott. The Downtown Design and Guidelines study is intended to preserve Downtown character by encouraging appropriate infill development that is sensitive to the historical nature of the area. This supports the underdeveloped assets that currently exist in Prescott's downtown.
 - A series of primary principles have been established for Prescott identified in the 2005 Official Plan. Town officials and residents are encouraged to support the principle related to tourism:
 - "Promote Tourism as a Key Component of the Local Economy. Prescott's industrial past is unlikely to be a significant part of its economic future. As such, it is important for the Town to grow and promote other sectors of the local economy. This Official Plan encourages new business and development opportunities that support tourism while ensuring that such opportunities provide local benefits and amenities for the community."

Source: Town of Prescott Official Plan, 2005

NEXT STEPS

The Premier-ranked Tourist Destination project has provided a clear appraisal of Brockville and District's position in the tourism marketplace and a benchmark to measure future performance. A critical finding in other Ontario jurisdictions that have implemented the recommendations arising from their PRTD projects is having tourism industry "buy-in" and more importantly, proactive industry involvement in future strategic planning.

CONCLUSION

Tourism has tremendous potential to enhance job and wealth creation within local municipalities while contributing to the quality of life for all residents. The implementation of the recommendations in partnership with local municipal efforts supports building and diversifying jobs and economic growth. The Premier-ranked Tourist Destination project provides a database of critical baseline data that paints a clear picture of Brockville and District's strengths and weaknesses and provides direction to pursue improved tourism industry success and augment Local Municipal tourism efforts. The process involved several critical steps along the way and a serious commitment and investment of time by the industry partners involved, for this we are grateful. The result in part is an expanded network of area stakeholders who have a more cohesive focus on solving ongoing and future tourism challenges.

Appendix 1- Transportation / Travel Trade Resources Checklist

Attribute	Yes	No
1. a. The destination has at least one easily accessed Visitor Information Centre,	<input checked="" type="checkbox"/>	<input type="checkbox"/>
b. on a major transportation route.	<input type="checkbox"/>	<input checked="" type="checkbox"/>
c. with clear and frequent directional signage	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	Yes	Almost No
2. a. Major tourist transportation routes to downtown(s) have frequent directional signage,	<input type="checkbox"/>	<input checked="" type="checkbox"/>
b. well-maintained road surfaces,	<input checked="" type="checkbox"/>	<input type="checkbox"/>
c. and attractively maintained public spaces.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
3. a. Transportation routes to major attractions have frequent directional signage,	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
b. well-maintained road surfaces,	<input checked="" type="checkbox"/>	<input type="checkbox"/>
c. and attractively maintained public spaces.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
4. Shuttle services or taxis and Tourist orientation information are available at transportation terminals	<input checked="" type="checkbox"/>	<input type="checkbox"/>
5. Tourist traffic congestion and way-finding problems are addressed by transit-based interventions, e.g., municipal transit, shuttle services, People Movers, satellite parking.	<input type="checkbox"/>	<input checked="" 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. a. Taxi drivers have been given service delivery training,	<input type="checkbox"/>	<input checked="" type="checkbox"/>
b. and briefing on tourist attraction locations.	<input type="checkbox"/>	<input checked="" type="checkbox"/>
8. All attractions serving the coach tour market have sufficient on-site bus parking, Or there is convenient access to a bus parking/staging area. (ex. Blockhouse Island, Fulford Place, Arts Centre)	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Travel Trade Resources Checklist - Attribute

Attribute	Yes	No
1. A complete inventory of receptive tour operators bringing coach or FIT travel to the destination has been completed. (There are none)	<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 type="checkbox"/>	<input checked="" type="checkbox"/>
b. issues e.g., parking, that impair visitation or the visitor experience;	<input type="checkbox"/>	<input checked="" type="checkbox"/>
c. opportunities to improve the visitor experience and increase visitation; and	<input type="checkbox"/>	<input checked="" type="checkbox"/>
d. other assets that, with additional investment, could attract group tour visitation.	<input type="checkbox"/>	<input checked="" type="checkbox"/>
3. A local receptive tour operator sits on a Workbook implementation committee.	<input type="checkbox"/>	<input checked="" type="checkbox"/>
4. A complete [smaller areas] or comprehensive cross sectional [larger centres] inventory of local travel agents serving clientele resident in the destination area has been compiled.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
5. Travel agents have been contacted to determine:		
a. Their perceptions of opportunities to package travel experiences within the destination area;	<input 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 2 - 2006 Visitor Survey Overview Report

Brockville and District Chamber of Commerce

The 2006 visitor surveys were conducted from July 5 to August 28 by 5 Summer Ambassadors. A total of 277 survey were completed at 2 locations: Tourism Office (48/17%) and Blockhouse Island (229/83%).

1. Is this your first visit to Brockville? 57% YES 43% NO
 - 1b. If no, how often do you visit? (Based on the 43% - NO)

2 nd time	22.0%	Once per year	14.5%
3 rd & 4 th time	13.0%	2 times per year	12.0%
5 th to 8 th time	9.5%	3-6 times per year	9.5%
10 th to 25 th time	6.0%	Monthly	5.0%
Numerous	4.0%	Bi-weekly	4.0%
Seasonally	.5%		

2. What is the MAIN PURPOSE of your visit to Brockville? (multiple checked)

Vacation / Getaway	39.0%	Dining	5.0%
Short Stop / just passing through	18.0%	Business	3.0%
1000 Islands Cruise	16.0%	Special Event	2.5%
Visiting Friends / Family	14.0%	Studying	2.0%
Boating / Water Recreation	13.0%	Season Home	1.5%
Shopping	8.5%	Theatre	1.0%

3. What or who influenced your decision to visit Brockville on a scale of 1-10 with 10 extremely influential? Please rate each option.

Recommendation from Family / Friends	34.0%	CAA/AAA Office	4.0%
1000 Islands Travel Guide	11.0%	Previous Visits	1.0%
Brockville Visitor Guide	9.0%	Business	.5%
Website	8.0%	Signs	.5%
Brockville Tourism Office	7.5%	School	.5%
In Ontario Guide	7.5%	Ports Guide	.5%
Newspaper Advertisement	5.5%	Below .5% - 21 other influencers	
Television Advertisement	4.5%		

4. Are you staying overnight in Brockville? 53% YES 46% NO 1% UNKNOWN
 - 4b. If yes, where are you staying?

On board boat	31.5%	Cottage	6.0%
Friends / Family	22.0%	Campground	4.0%
Hotel / Motel / Inn	20.5%	Unknown	3.5%
Bed & Breakfast	9.5%	Marina	1.5%

5. What will you are doing on your visit?

Shopping	45%	Festivals	7%
Dining	43%	Fort Wellington	5%
1000 Islands Cruise – Brockville	34%	BAC – Summer Program	2%
Boating	22%	Walking	2%
Visiting Family / Friends	17%	Business	1%
Picnicking	12%	Waterfront Park	1%
Fulford Place	11%	Sporting Event	1%
Brockville Museum	10%	Diving	1%
Bicycling	9%	Site Seeing	1%
1000 Islands Cruise – Other	8%	Walking Tour, Ghost Walk	1%

6. How long is your visit to Brockville?

A day: 1 - 4 Hours	24%	Three overnights	7%
One overnight	18%	More than four	6%
A day	15%	5 - 10 days	4%
Two overnights	12%	1 - 4 months	3%
A day: 5 - 10 Hours	8%	Four overnights	2%
		14 – 21 days	1%

7. Where is your hometown?

Ontario Total 35%

20% Ottawa	12% Toronto	5% Kingston	4% London	3% Cornwall
3% Kemptville	3% Long Sault	3% Manotick	3% Maxville	3% North Gower
3% Picton	3% Sarnia	3% Smiths Falls		3% Thornton

1% Almonte, Avonmore, Brampton, Burlington, Elgin, Guelph, Hawkesbury, Ingersoll, Kitchener, Limoges, Maitland, Markham, Moose Creek, New Liskeard, Oshawa, Parry Sound, Perth, Scarborough, St. Catharines, Summerstown, Thunder Bay, Welland, Wellington, Westport, Windsor

Quebec Total 26%

38% Montreal	12% Gatineau	7% Laval	5% Repetigny	3% Ile Perrot	3% Quebec City
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2% Aylmer, Beaconsfield, Boucherville, Cantley, Drummondville, Granby, Kazabazua, Kirkland, La Tuque, Lavaltrie, Pointe Claire, Portage du Fort, Shefford, St. Alphonse, St. Colomban, St. Jean Richlieu, Terrebonne, Val d'Or

United States Total 23%

42% New York	12% Pennsylvania	8% Florida	6% Michigan	4% California
4% Minnesota	2% North Carolina, Maryland, New Jersey, Nevada, New Hampshire, Virginia			

Overseas Total 11%

33% Mexico	17% China	8% France	8% Switzerland
4% Greece, Denmark, Holland, Ireland, Poland, Puerto Rico, New Zealand, South Korea			

Other Total 5%

42% BC	25% Alberta	17% Saskatchewan	8% Yukon	8% Manitoba
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Top Five Locations:

Ottawa /Gatineau	10.1%	Montreal	9.9%	New York State	9.7%
Toronto	4.2%	Mexico	3.6%		

8. What is your main destination on this trip?

Brockville	39%	Toronto	4%
1000 Islands region	24%	USA	4%
Ottawa	7%	Maritimes	3%
Montreal	6%	Other - 8%: Charleston Lake,	
Kingston	5%	Westport, Mallorytown	<1%
		Lansdown, Delta ...	

9. Where are you travelling after visiting Brockville?

Home	42%	Toronto	8%
Ottawa	13%	Other – 16%: Alberta, Picton,	
Montreal	11%	Gananoque, Prescott, Trenton,	
Kingston	10%	A-Bay, Smith Falls, Cornwall ...	<1%

10. How much would you estimate you will spend on your visit to Brockville, including accommodation?

Less than \$100	40.7%	\$501 to \$750	6.3%
\$101 to \$250	24.4%	Over \$1,000	4.5%
\$251 to \$500	20.8%	\$751 to \$1,000	3.1%

11. How long ago did you make plans to visit Brockville?

Today	31%	2 – 4 months ago	13%
1 - 4 days ago	17%	3 - 8 weeks ago	12%
5 - 21 days ago	16%	more than 4 months ago	11%

12. What is your most memorable experience in Brockville?

25%	1000 Islands Cruise
13%	Waterfront Park / Harbour
7%	Friendly
6%	1000 Islands
6%	History (buildings)
6%	Student Ambassadors
6%	Shopping
3%	Beautiful City
3%	Boating
2%	Don's Fish & Chips
2%	Ice Cream
1.5%	Fulford Place, Food, Poker Run, Riverfest, Train Tunnel
<1%	Farmers' Market, Tourism Office, Diving, Bike Path, Boldt Castle, Fireworks, Museum, Car Show, Rib fest, Golf, New York Restaurant, Tim Horton's, Site Seeing

13. What improvements would you suggest for Brockville?

49%	No improvements needed
8%	More Downtown Shopping
6%	Cleaner Bathrooms
6%	Movie Cinema
2%	More Downtown Restaurants
2%	Longer Shopping Hours
2%	Inexpensive Campgrounds in the area
2%	Bilingual Brochures
2%	Internet at the Harbour
2%	Bilingual Service
1%	Lockers for Bikers
1%	Public Washrooms
1%	Casino
1%	More boat trailer parking
1%	Cruise for family
1%	Open Train Tunnel all the way
1%	More information on the Train Tunnel
1%	More for kids to do

14. Demographics of party:

14a. Number of people in party

2	44%	3	11%
4	19%	1	7%
5 or more	19%		

14b. Ages within party

age 35 – 54	34%	age 65 plus	9%
age 55 – 64	16%	age 13 – 17	9%
age 25 – 34	15%	age 18 – 24	4%
age 5 – 12	10%	newborn – age 5	3%

14c. Description of party

Family	39%	Group of Friends	15%
Couple	37%	Single	9%