

City of Belleville
2018
Business Retention and Expansion Project



Tourism and Events Sector Report

February 2019

Prepared by:



Contents

Executive Summary..... 3

1.0 Project Introduction..... 5

2.0 Methodology..... 5

3.0 Survey Results 6

 3.1 Company Information..... 6

 3.2 Local Community 10

 3.3 Future Plans 14

 3.4 Labour Force 15

 3.5 Municipal Services 16

 3.6 Festivals and Events 19

 3.7 Final Comments 25

4.0 Summary 25

5.0 Recommendations 27

 Marketing..... 27

 Local Community 27

 Labour Force 28

 Municipal Services 28

 Festivals and Events 28

Executive Summary

The City of Belleville initiated the first Business Retention and Expansion (BRE) project for its tourism and festivals/events sectors to determine the issues and concerns surrounding this industry as well as the opportunities and advantages that Belleville has to increase its presence in this lucrative and growing sector of the economy.

Fifty-five businesses participated in this study to provide input into how they can work together with the City of Belleville to increase tourism visitation and receipts to the area as well as increase the scope and potential of current festivals/events and create new 'signature' events with regional and provincial potential.

Throughout the series of questions in the Tourism and Events BRE, businesses were united on the 'barriers' to growth in this sector and felt that recognition of these barriers by the City would lead to increased growth and success in tourism and presentation of events that will increase Belleville's potential in visitation. The City lies in the heart of several well-known and recognized tourist areas and is well-positioned to capitalize on tourists already visiting the area from Ottawa and the GTA to enjoy the Bay of Quinte, Prince Edward County, Presqu'île Provincial Park and as far east as Kingston and the Thousand Islands.

Business owners felt that Belleville is a good area in which to operate a tourism business given its proximity to other tourism icons as well as its access to an extremely large population of tourists seeking experiences not available in more urban areas. Business owners also recognized that there are potential developments and assets that would not only benefit their own business growth, but tourism in general in the Belleville area. Included in this list is the importance to develop the City of Belleville's waterfront areas as this asset is underdeveloped currently and has the potential to significantly affect tourism in the area.

Business owners also felt that downtown Belleville is in need of a masterplan to increase business growth and user enjoyment – downtown areas in Ontario are enjoying a resurgence and visitors are seeking out more unique offerings and personal experiences typically only available in downtown areas. Now that the City of Belleville has completed major infrastructure and streetscaping improvements in downtown Belleville, the time is opportune to develop a masterplan to elevate downtown Belleville to the next level in terms of business attraction, cultural and historic experiences and entertainment while managing safety, parking and open spaces.

While tourism businesses appreciate the many restaurants and accommodations available within the City, there was general agreement that there was a lack of 'things to do' for all ages including adults who are seeking nightlife and evening entertainment to complement an otherwise great tourism experience.

Barriers to tourism business growth were varied and primarily included a difficult permit process and bureaucracy at the municipal level was common to most businesses interviewed, in addition to underdeveloped product in tourism activities and facilities i.e. waterfront, historic/cultural amenities and tours. Workforce issues were also a common barrier to growth given the shortage of an available labour force, both skilled and unskilled. Tourism businesses are unique in their labour force needs as they often require staff to work weekends and evenings and typically offer seasonal employment.

Festival and event planners were also surveyed to determine how the City of Belleville could better accommodate this sector and increase event visitation to the area. Again, Belleville's location between major centres, highway access and proximity to already established tourism attractions were considered its greatest assets. However, lack of available venues and services was considered to be an obstacle by event planners in addition to red tape at the municipal level and seasonal challenges with availability and cost of hotels in the City.

This report includes the opinions of businesses in both the tourism and festivals/events sectors for new tourism initiatives and new and enhanced festivals and events. Each of these suggestions have merit and many have been included in the recommendations which have been grouped into key areas of focus including marketing, local community, labour force, municipal services and festivals/events.

As noted previously, the City of Belleville is extremely well-positioned to become a first class tourist area, both as a stand-alone destination and also in partnership with other tourism entities in the Bay of Quinte area and also with other organizations dedicated to the support and promotion of tourism.

The City's commitment is evident by its support of initiatives currently managed by the Belleville Chamber of Commerce and the Bay of Quinte Regional Marketing Board, and more recently by the establishment of a tourism position within the Economic and Strategic Initiatives Department and by its dedication of resources towards this 2018 Tourism and Events Sector Business Retention and Expansion study.

Of greatest value is that the tourism community is excited that the City of Belleville is giving tourism a higher profile than in the past and they are willing to be a contributing partner to reach the City's maximum growth potential as a major tourism player in the area and the Province of Ontario.

Libby Smith, Ec. D.
Terra Consulting
February 2019

1.0 Project Introduction

Business Retention and Expansion (BRE) is an initiative designed to strengthen the local economy and build the capacity of communities. It was developed as an economic development tool for rural Ontario by the Ontario Ministry of Agriculture Food and Rural Affairs (OMAFRA), with the unique approach of engaging communities to actively invest in the longevity of the local business community.

BRE allows for communities to work in partnership with multiple business interest groups by providing a systematic interview and data gathering approach to gauge the health of the local economy. The information gathered through the process clearly outlines the current strengths and arising opportunities for community partners to implement measures to further develop the local business economy.

The City of Belleville conducted its first Tourism and Events Sector BRE in 2018 which will establish a benchmark for progress in resolving issues and advancing positive growth in this sector in the future.

2.0 Methodology

Planning for the 2018 Tourism and Events BRE began in the Spring of 2018 by the Economic and Strategic Initiatives Department in consultation with the Business Retention and Expansion Committee of Council.

The list of City of Belleville Tourism and Events sector businesses was established in collaboration with development staff and the BRE Committee which resulted in a list of 90 businesses representing a cross section of businesses and events in this sector. In November of 2018 an e-letter was sent from the Manager of Economic and Strategic Initiatives, Karen Poste, to all businesses in the study group along with a copy of the survey to be conducted in person by Terra Consulting, a local economic development consulting firm with experience in the BRE process. The letter explained the process and encouraged businesses to participate. The list of 90 included 26 businesses in the festival and events category with the balance of 64 being tourism related attractions and services, accommodations, food services and retail. Due to their relevance in this project, the results of those participating in the festival and events category are further explored in Section 3.6.

Taking place in November and December of 2018, the project 'City of Belleville Tourism and Events Business Retention and Expansion Project 2018', resulted in interviews with 55 Belleville businesses which led to this report and subsequent recommendations to address concerns arising from the suggestions and concerns of participating businesses. In breaking down the list, 43 interviews were conducted with tourism businesses and 12 with event/festival organizers.

All businesses were assured of confidentiality throughout the survey process and are not identified with their responses in this report. The data was sorted via an online survey program and monitored by both Terra Consulting and the Economic and Strategic Initiatives Department to ensure the collection process was accurate.

Throughout the interview process, businesses were able to request information or assistance as well as express concern regarding issues affecting their business satisfaction and performance. While no critical

'red flag' issues were reported, a few minor inquiries and concerns were reported to the Development and Tourism Assistant as well as the Manager of the Economic and Strategic Initiatives Department for follow up. Current business data was also collected and submitted to the City to assure accuracy of their business listings for the City of Belleville.

3.0 Survey Results

The Business Retention and Expansion interviews focussed on the following topics:

- Company Information
- Local Community
- Future Plans
- Labour Force
- Municipal Services
- Festival and Events

All businesses were offered several opportunities for additional comments and open dialogue regarding challenges and concerns of the tourism and events sector. **When lists are offered as responses, they are in descending order of repetition and the most repeated responses are in bold.**

3.1 Company Information

In order to classify tourism businesses, a range of questions was asked pertaining to their business activity, length of time in business, current location, visitor profile, expansion issues and marketing.

3.1.1 Primary Activity

Businesses identified their primary activity as follows:

Primary Activity	% of Total
Accommodations only	7%
Accommodation and food services	2%
Food service only	14%
Attraction	15%
Speciality retail	26%
Other	36%

The 'Other' category included sporting, beer/wine, community theatre, culture, spa, and tourism organization.

Those that described their primary activity as 'Accommodations' further described their property as a 2-3 star hotel (75%) and 4-5 star hotel (25%). When asked the average length of stay of their guests, 100% responded at 2-4 nights.

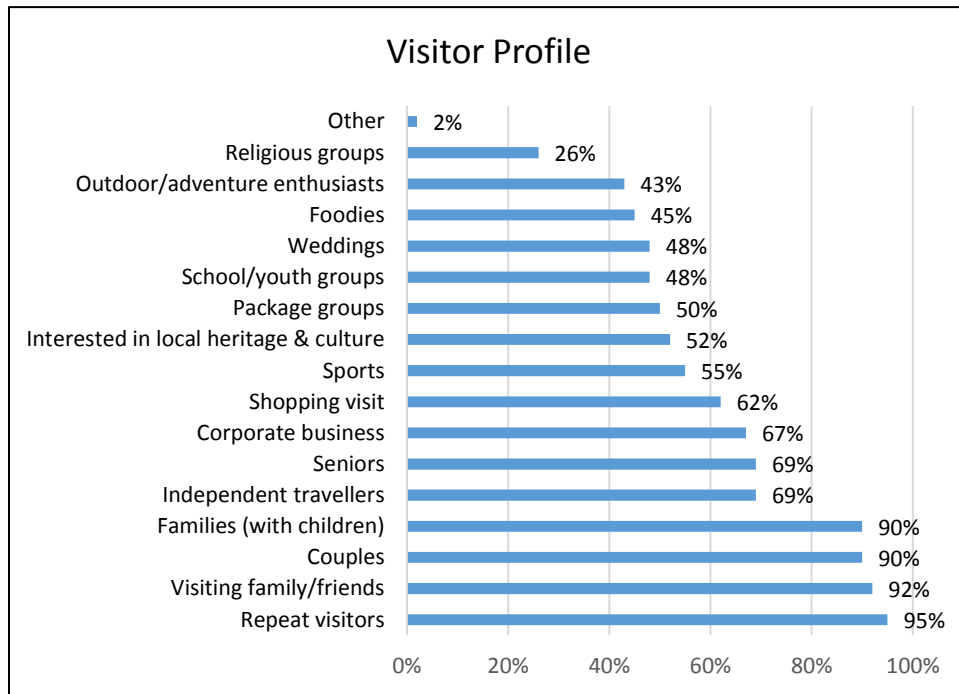
3.1.2 Property Ownership

There was nearly an even split between those businesses that owned their property location (53%) and those that rented or leased (47%). When asked how long they had been in business in the City of Belleville, most businesses (58%) had been in business for more than 20 years. Full results included:

Less than 1 year	2%
1-5 years	20%
6-10 years	10%
11-15 years	0
16-20 years	10%
More than 20 years	58%

3.1.3 Visitor Profile

Businesses were asked to describe their visitor profile – the ‘typical’ tourist who visited their business. The results were primarily couples, families and repeat visitors as well as visiting family and friends. The breakdown was as follows:



When asked what their guests say they what else are looking to experience while in Belleville, the most often responses offered in order of repetition were:

1. Restaurants
2. Prince Edward County/wineries/Sandbanks
3. Waterfront
4. Heritage/arts/culture/museums
5. Retail
6. Attractions/things to do
7. Special events i.e. concerts and festivals
8. Parks and trails
9. Night life and adult entertainment
10. Casino
11. Downtown
12. Kingston

When asked the average number of visitors/guests businesses receive each year on average, the following results were recorded:

Number of visitors/guests	Percentage
250 – 500	7%
500 – 1,000	7%
1,000 – 5,000	23%
5,000 – 10,000	13%
10,000 – 20,000	10%
More than 20,000	40%

Business owners were asked the origin of their visitors/customers with the following results:

Origin	Percentage
Local – within 20 kms	49%
Regional – within 40 kms	23%
Other parts of Ontario	19%
Other parts of Canada	6%
International	3%

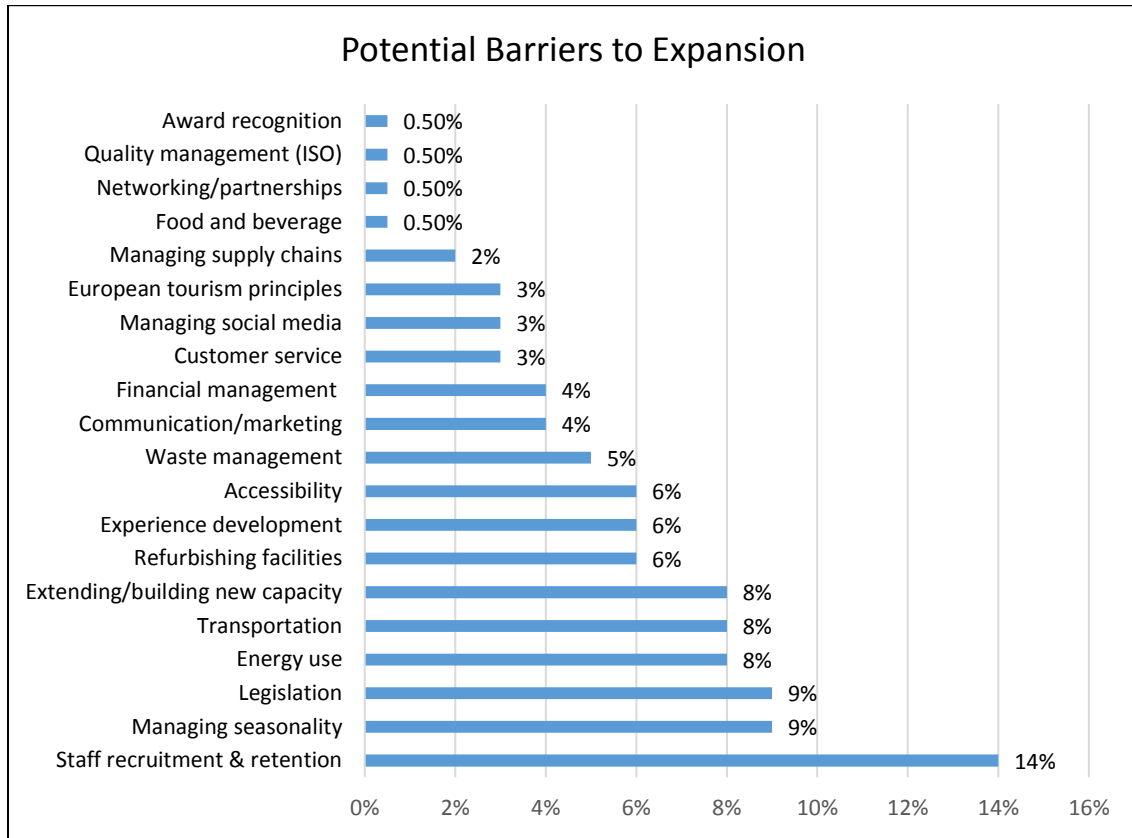
When asked what their primary tourism business season is, the results were:

Season	Percentage
Spring	22%
Summer	35%
Fall	22%
Winter	21%

Thirty-nine percent (39%) of businesses indicated that they tracked visitation to their tourism business and most were willing to share their data with the City of Belleville to utilize when planning its marketing strategy.

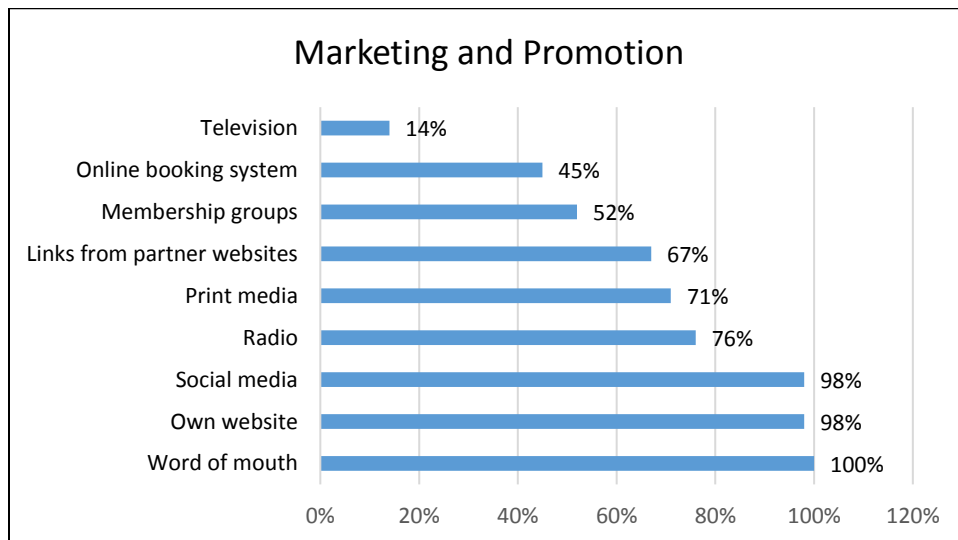
3.1.4 Barriers to Expansion

Business owners were asked to indicate any barriers to expansion of their business. The most commonly selected barrier was staff recruitment and retention.



3.1.5 Marketing

When marketing their tourism business, the most used mediums in addition to word of mouth was their business website and social media.



Businesses also worked in partnership with other tourism/business organizations to create awareness of their product or service. Bay of Quinte Regional Marketing Board and the Belleville Chamber of Commerce were the two organizations most frequently partnered with at 74% each, followed by the City of Belleville at 57% and the Regional Tourism Organization (RTO 9) at 29%. Primary partnership activities were noted as:

- 1. Joint/cross marketing and advertising**
- 2. Guides and maps**
- 3. Events and projects**
- 4. Membership and conferences**
5. Strategic initiatives, planning and roundtable discussions
6. Grants and funding
7. Training programs
8. Cooperative bidding

3.2 Local Community

This section explores advantages and challenges of operating a tourism business in the City of Belleville, satisfaction levels with municipal services and competitive advantages.

3.2.1 Advantages to Operating a Tourism Business in Belleville

Business overwhelmingly felt that Belleville is a good area in which to operate a tourism business at 92%. When asked what they considered to be the top advantages to operating a tourism business in the area, the top response was the natural area in the Bay of Quinte offering opportunities in fishing, boating, hiking etc. Responses included:

- 1. Bay of Quinte natural area – boating, fishing, hiking, trails etc.**
- 2. Proximity to Prince Edward County – wineries, sandbanks**
- 3. Waterfront area**
- 4. Location on 401 and between major cities**
- 5. Community heritage and culture**
6. Local food producers/rural area
7. Downtown
8. Friendly small town with amenities
9. Events and theatre
10. Affordability
11. Accommodations
12. Supportive business environment
13. Attractions
14. Other single responses included hockey, population, good shoulder season and local transportation i.e. bus, rail

Tourism business owners were asked what tourism assets would benefit their business or the community as a whole. The most popular response was to develop Belleville's waterfront including a water park, boat rentals, tours, restaurants and retail. Responses included:

- 1. Developed waterfront**
- 2. More historic/heritage attractions and tours**
- 3. More downtown businesses**

4. **More unique accommodations i.e. glamping, boutique waterfront hotels**
5. **Nightlife/entertainment**
6. Winter activities
7. RV dump
8. Theatre arts experiences
9. Music/concerts
10. Campgrounds
11. Other single responses included fish market, better parking at sports centre, bike rentals, Christmas market, public washrooms, and information for boaters at the marina

When asked what the major tourism drivers and attractions were in the area the most repeated response was the areas proximity to Prince Edward County and the Bay of Quinte area and waterfront in general giving visitors the opportunity to fish, boat and enjoy nature. It was also felt that sports/hockey was a generator as well as Shorelines Casino and Empire Square events.

If a tourism forum/event/conference were hosted and held in Belleville, 88% of respondents indicated they would attend.

3.2.2 Challenges to Operating a Tourism Business in Belleville

Belleville tourism businesses felt that the greatest challenge to operating a tourism business in the area was an underdeveloped downtown core which is integral to attracting visitation, lack of a critical mass of attractions as well as the City's underlying resistance to change and its inability to see itself as a tourism destination. Responses included:

1. **Downtown issues – drugs, parking, safety, bad reputation and lack of residential density**
2. **Lack of things to do and attractions**
3. **City's resistance to change and embrace tourism**
4. **Seasonality issues**
5. **Lack of marketing at municipal level**
6. **Competition from other areas i.e. Prince Edward County, Kingston**
7. **Lack of opening hours on weekends and evenings, particularly downtown**
8. Stigma and local perception of Belleville
9. Municipal red tape
10. Taxi availability and reliability issues
11. Issues surrounding high speed internet
12. Other single issues include lack of cultural industries, low family income, high taxes, lack/cost of hotels

3.2.3 Satisfaction Level with Tourism Facilities in Belleville

When asked to describe their satisfaction levels with tourism facilities in Belleville, highest levels were given for accommodations and food services with lower levels showing as public washrooms, information centres and attractions.

Tourism Facility	Excellent %	Good %	Fair %	Poor %	Unsure %
Availability of public washrooms	9	15	22	39	15
Condition & cleanliness of public washrooms	10	27	24	2	37
Highway signage	3	45	20	32	0
Highway rest areas	5	49	15	15	16
Information centres	5	20	38	30	7
Attractions	15	26	28	31	0
Accommodations	34	51	5	0	10
Food services	25	55	12	8	0
Retail	8	63	17	12	0
Accessibility	10	50	23	7	10
Parking	13	40	31	16	0

3.2.4 Advantages and Disadvantages in Doing Business in the City of Belleville

When asked to consider advantages and disadvantages of doing businesses in Belleville, greatest advantages were considered to be quality of life, support from local businesses/residents and the Bay of Quinte Regional Marketing Board. Disadvantages were seen to be availability of skilled labour, local permit process and municipal taxes.

Advantage/Disadvantage	Advantage %	Disadvantage %	Unsure %
Availability of skilled labour	26	57	17
Cost of labour	46	28	26
Land costs	39	12	49
Leasing costs	37	19	44
Local permit process	12	50	38
Available utilities	54	29	17
Access to markets/customers/clients	78	17	5
Access to required supplies	64	24	12
Municipal taxes	17	46	37
Quality of life	95	5	0
Access to training facilities	62	17	21
Support from municipality	58	37	5
Support from local business	81	7	12
Support from local residents	86	0	14
Support from Belleville Chamber Visitor Services	64	7	29
Support from Bay of Quinte Regional Marketing Board	75	5	20

3.2.5 Competitive Advantages

Businesses felt that the most important factors in remaining competitive in the next five years are new market development locally, development of partnerships and tourism expansion. Expansion of company workforce was considered to be least important.

Competitive Advantage	Extremely Important	Somewhat Important	Not Very Important	Unsure
New product research and development	63	25	12	
New market development locally	83	17		
New market development outside local area	60	40		
Add or change in business products or services	46	33	18	3
Improving worker productivity	48	25	10	17
Expansion of company workforce	31	33	31	5
Workforce health and safety	60	17	17	6
Workforce skills development	67	17	8	8
Energy costs	63	13	19	5
Water/sewer costs	44	13	28	15
Improvement of customer service	70	25	5	
Exchange rate for Canadian dollar	44	28	28	
Tourism expansion	75	22	3	
Funding	73	22	5	
Partnerships	82	13	5	

Comment: Regulations regarding development of upper floors of heritage buildings in downtown Belleville is very restrictive and discourages re-development of the properties.

3.2.6 Product and Services Voids

Most businesses were completely satisfied with their ability to acquire their products and services within the City of Belleville. Suggestions from those who had to reach out to other municipalities for their needs were:

- Rental equipment for hospitality and tourism events
- Agrifood products
- Bulk supplies (Costco)
- Large scale signage
- Local transportation – taxis/bus
- Art supplies
- Concrete products
- Industrial supplies
- Bakery
- High speed internet
- International foods
- Fish market
- Restaurant supplies
- Canoes, trailers and camping supplies

3.3 Future Plans

Business owners were able to describe their future plans in this section including relocation, expansion and closure.

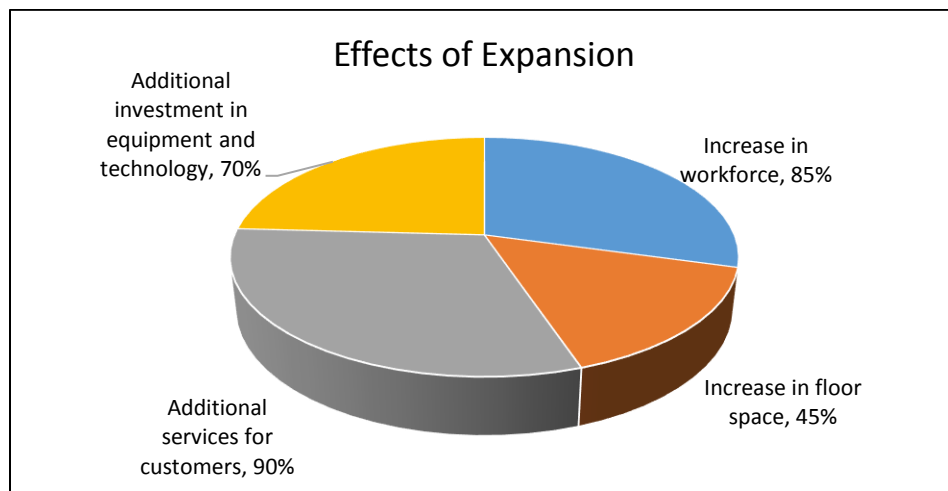
3.3.1 Relocation

Eighty-two percent (82%) of business owners indicated they did not have any plans to relocate their business in the next five years. One business was planning to move to Quinte West for the appropriate size of property and one will relocate within Belleville for a larger location – possibly downtown.

When asked how the City of Belleville could prevent relocation of businesses outside of the municipality, it was suggested to make downtown Belleville an inviting business and social area, ensure a warmer reception and less complications during the approval process and provide assistance in compliance with upcoming accessibility legislation and building standards.

3.3.2 Expansion

The majority of business owners (84%) indicated they do not plan to expand the footprint of their existing building within the next five years, however, 54% plan to expand their operation within the City. When asked how this expansion will affect their business, the following was offered:



Other businesses indicated the addition of entertainment and plans to develop a travelling exhibit. There was nearly an even split between tourism businesses experiencing difficulties with their expansion plans and those that were not. Of the 47% indicating issues, the following reasons were given:

- Funding
- Strategic planning delays
- Looking for a suitable location
- High speed internet concerns

Business owners felt that the City could help in the following ways:

- Better parking in downtown – better signage to parking areas especially by the Moira River
- Better transit options
- Increased funding for the arts
- Better internet infrastructure
- Help in searching out funding options

- Attraction of unskilled workforce
- Tax relief for unrented properties
- Make grants available for business start-ups
- Make approval process more cooperative and collaborative
- More support for tourism initiatives

3.3.3 Closure

Most businesses in the survey sample (79%) did not plan to close their business within the next five years. The balance were 'unsure'.

3.4 Labour Force

Tourism businesses were given the opportunity to discuss labour force issues that are particularly challenging for this sector given its seasonality and entry level type positions.

3.4.1 Employee Levels

There was a total of 1341 employees (not including owners) in the 43 tourism businesses participating in the study, in addition to approximately 120 volunteers. Recognizing that tourism is seasonal and has more part time workers than other sectors, the breakdown was as follows:

Category of employees	Total employees	Percentage of the total
Full time	498	37%
Part- time	650	48%
Seasonal	163	12%
Temporary	6	.04%
Cooperative	28	2%

When asked if employee levels will increase, decrease or remain the same over the next five years, the responses were even at 45% for increase or remain the same. One business owner indicated decreased employee levels due to technological efficiencies. Three businesses were unsure. Of those that indicated an increase in workforce, the average increase in employee levels was 5.5 employees.

Business owners were asked if they had difficulty recruiting qualified employees for their location. Fifty-nine percent (59%) indicated they did have issues with recruitment. When asked what they do to actively recruit employees, the following responses were received.

- Online ads
- Word of mouth
- Social media
- Employment agency

Most business owners did not have difficulty retaining employees at 76%. The following approaches were taken by business owners to ensure a low turnover rate:

- Competitive wages
- Recognition awards
- Advancement opportunities
- Incentives for training
- Supportive management
- Full time positions

3.4.2 Workforce Skills

Tourism business owners were asked if they experienced any skills or other workplace voids in the local workforce. By far, the most common response was maturity, motivation, work ethic, willingness to work and reliability. Specific skill sets difficult to find in the local work force market included:

- Ticket sales
- Lifeguard
- Knowledge of wine
- Kitchen skills
- Computer skills
- Aestheticians
- Tourism knowledge of region
- Social media

3.4.3 Minimum Wage

Two-thirds of businesses (66%) indicated that the increase in minimum wage had a negative impact on their business. This impact was in the form of a higher cost of doing business due to increased wages as well as a higher cost of supplies and services. One business felt it was a positive change as it increased their customer's buying power.

3.4.4 Labour Force Development

The following suggestions were offered when asked what actions the City or training institutions could do to assist with labour force development:

1. Promote the City as a municipality with available jobs in the tourism industry
2. Ensure affordable housing for tourism industry employees
3. Improve availability of apprentice programs
4. Offer workplace readiness programs
5. Consider a satellite campus in downtown Belleville
6. Support workplace experiences and cooperative placements
7. Develop an interest at the school level promoting tourism as a career
8. Dedicated City staff person for labour force development
9. Offer customer service and ambassador training programs

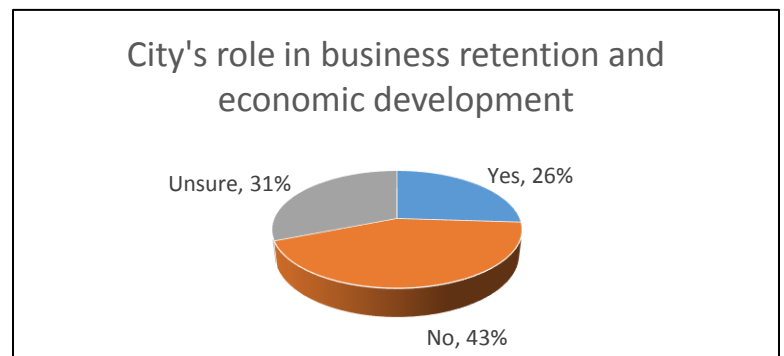
Most respondents (88%) were not aware of the City's Work in Belleville resume database program. Conversely, 83% were aware of the City's bi-annual Quinte Regional Career and Training Fair.

3.5 Municipal Services

Tourism businesses are very reliant on municipal and community services and depend on the City of Belleville to create a positive and supportive working environment for tourism growth. This section contains their opinions on services within the City.

3.5.1 Level of Satisfaction with Community/Municipal Services

Business owners were asked if they felt that the City of Belleville takes an adequate role in business retention and economic development. Responses were mixed as follows:



When asked what more the City could do to support business retention and economic development, most comments were directed at downtown recruitment and increased resources. Comments included:

1. Work with BDIA to promote downtown core as a business location – grants for new openings
2. Need more resources directed towards business recruitment – need proactive plan
3. More waterfront development
4. Need more innovative thinking – listen to industry more
5. More focus on cultural and creative class economy
6. Ensure flexible zoning and don't over regulate
7. Focus efforts on small business
8. Engage existing tourism business owners in recruitment initiatives

Tourism business owners were asked to rate their levels of satisfaction with various community agencies and/or City of Belleville departments. Highest levels of satisfaction were with policing, fire services and recreational services. Lower levels of satisfaction were with the building department, street repairs, public transit and roads.

Community Agency or Municipal Department	Very Satisfied	Somewhat Satisfied	Somewhat Dissatisfied	Very Dissatisfied	No Contact
Planning (site plans, severances, minor variances, etc.)	10	20	8	10	52
Planning (zoning)	7	18	8	10	57
Building Department	7	20	13	20	40
Policing	50	35	10		5
Fire prevention services	60	18	3	2	17
Fire inspection services	67	17	3	3	10
Water utility	43	20		10	27
Electricity provider (Veridian/Hydro One)	43	37	5	5	10
Street repairs	12	43	20	20	5
Snow removal	17	55	5	15	8
Public transit	18	40	10	17	15
Loyalist College	33	42	7	3	15
Child care services	7	20	5	3	65
Recreational services	49	36		2	13
Medical and health services	28	40	20	7	5
Public schools	23	42	0	3	32
Roads	7	50	18	20	5
Economic Development	18	47	15	10	10
Tourism	10	59	18	8	5
Belleville Chamber visitor services	20	50	5	5	20
Bay of Quinte Regional Marketing Board	33	41		3	23

Additional comments were focussed on:

1. Transit – better bus service and greater reliability with taxi service
2. High speed internet
3. Infrastructure in North end of City

3.5.2 Municipal Accommodations Tax

The Transient Accommodation regulation allows for municipalities across Ontario to implement a Municipal Accommodation Tax that has the potential to generate significant funding to support marketing and tourism investment attraction efforts. Tourism business owners were asked their opinions on priorities for the use of this funding as it relates to tourism development. Marketing of Belleville as a destination was the most repeated comment followed by waterfront development and support of new events. This question combined the opinions of both the tourism as well as the events respondents. Most often repeated responses are as follows:

- **Destination marketing**
- **Funding for new events in Belleville i.e. agricultural fair, horse racing, outdoor events, film fest, jazz fest, fringe festival etc.**
- **Enhance the aesthetics of downtown properties and increase downtown recruitment initiatives**
- **Investment into waterfront development**
- **More and better signage on highway and throughout City**
- Support for arts and culture initiatives
- Expansion of existing festivals i.e. Waterfront Festival
- Beautification of City in general i.e. plantings, green areas etc.
- Product development i.e. heritage experiences
- Off season/shoulder season support
- Solutions for transit issues i.e. bus and taxis
- Local campground
- Improve tour bus service
- Grants for new tourism and hospitality businesses
- Infrastructure for events i.e. power and event supplies

3.5.3 Barriers to Business Growth

When asked what barriers to the growth of business currently exist in the City of Belleville, the most common response were issues at the municipal level and an underdeveloped waterfront. Responses included:

1. **Difficult permit process and bureaucracy at the municipal level – real and perceived**
2. **Municipal council is resistance to change and new ideas**
3. **Underdeveloped waterfront**
4. **Workforce issues**
5. **Downtown issues - vacant properties, lack of business and parking issues**
6. Access to capital
7. Lack of infrastructure i.e. water/sewer, high speed internet
8. High taxes
9. Transit issues – bus system not reliable particularly on Bell Blvd. West
10. Aging population and low incomes
11. Lack of night life and attractions
12. Lack of buy locally mentality
13. Monopolies on property development

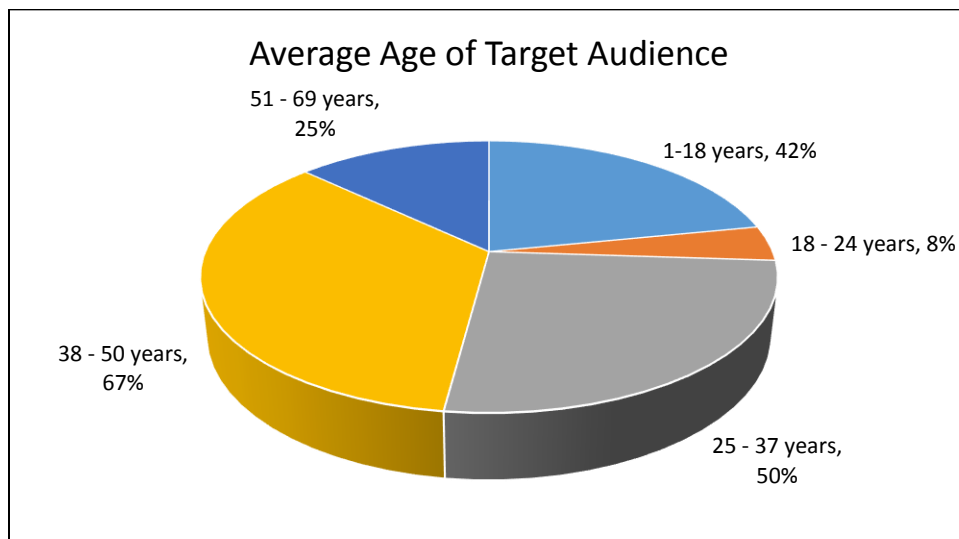
3.6 Festivals and Events

Event and festival organizers were interviewed using a survey with a slightly different focus intended to identify issues and challenges and to gather information that would facilitate growth in this important sector of Belleville's economy.

3.6.1 Festival and Event Participants

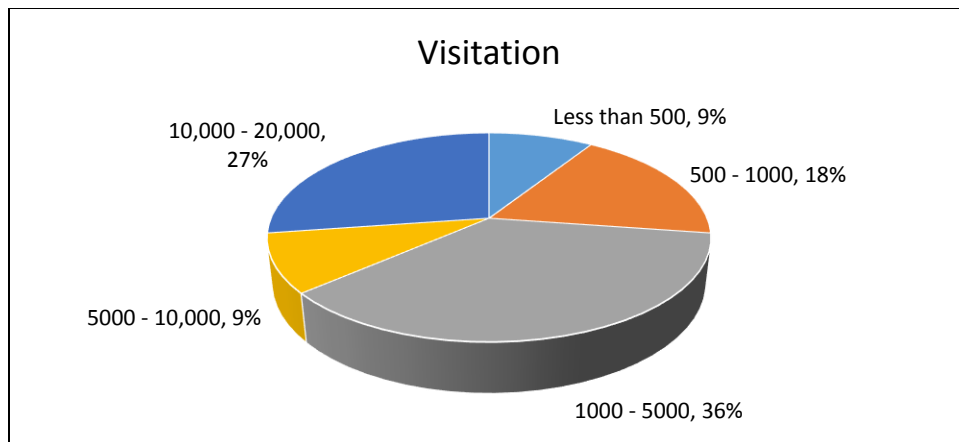
Most businesses (58%) were identified as being in the sports category with 34% as having a community based focus and a further 8% were considered as having a primary retail focus. Most festivals and events had been in operation in the City of Belleville for more than 20 years (58%) and 25% could be considered 'new' being in existence less than five years.

When asked the average of their target audience, event and festival organizers indicated the following:

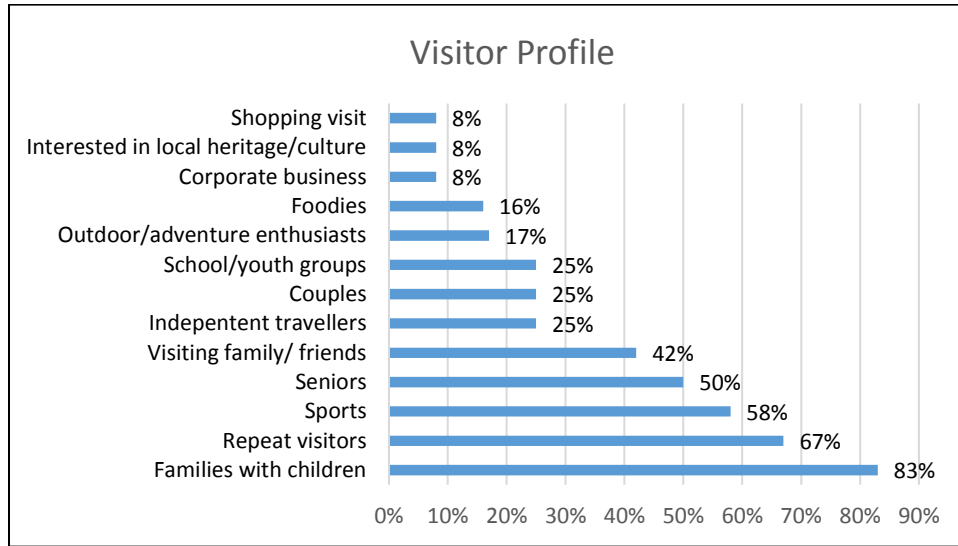


Event planners were asked when their event is held. The results were evenly split between spring, summer and fall with fewer events being organized in the winter.

Most events/festivals attracted a modest number of visitors annually with only three event planners indicating more than 10,000 annually.



Visitor profiles were identified primarily as families, repeat visitors, sports and seniors as below:



More than half (58%) of event organizers indicated that their audience is outside of the region (greater than 40 kms) while 42% indicated their events strictly attract a local audience.

Most event planners (58%) did not track visitation demographics. Of the 42% that did, most (66%) were willing to share this data with the City of Belleville to assist with their tourism development and marketing planning.

Event planners were asked to provide a budget range for their event with the following results:

Budget	%
Less than \$25,000	27%
\$25,000 - \$50,000	27%
\$50,000 - \$100,000	27%
\$100,000 - \$250,000	0%
Greater than \$250,000	19%

3.6.2 Visitor Inquiries

Event planners were asked what else their visitors are looking to experience while in Belleville. The most common response was restaurants followed by attractions and things to do while in the City.

3.6.3 Advantages to Operating an Event in Belleville

One hundred percent of event planners felt that the Belleville area is a good one in which to operate an event. When asked what they considered to be advantages of operating an event in Belleville, the most common response was Belleville's location. Other responses were:

1. **Belleville's location on the 401 and between major centres**
2. **Sport and Wellness Centre including cooperation of staff**
3. **Bay of Quinte area with its great outdoor attractions and proximity to Prince Edward County**
4. **Ample accommodations**

5. Park areas
6. Waterfront area
7. Concentration of restaurants

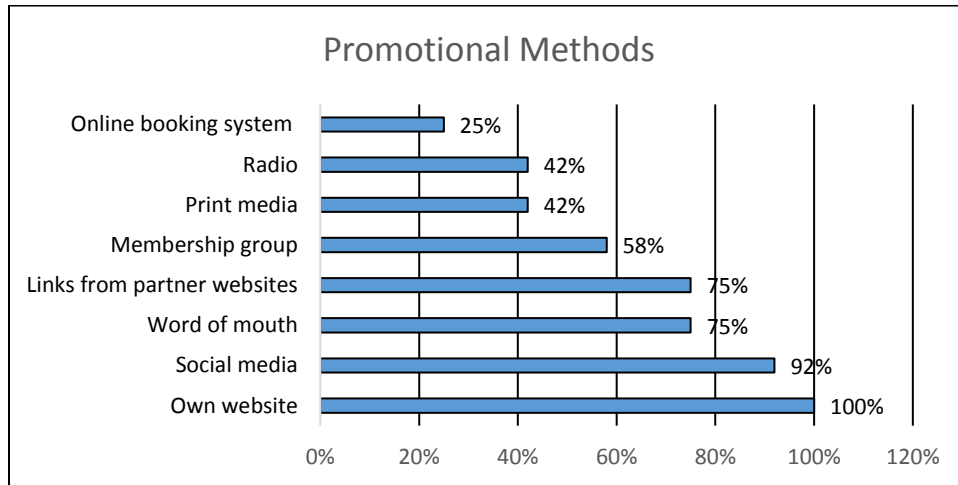
3.6.4 Challenges to Operating an Event in Belleville

When asked what the greatest challenges were in operating an event in Belleville, the responses were as follows:

1. **Sport and Wellness Centre issues – costs, availability and bureaucracy, lack of available ice time**
2. **Lack of municipal support i.e. permits, bylaws etc.**
3. **Hotels – availability and costs**
4. Lack of supplies, equipment and utilities available for events
5. Difficult to find experienced staff and volunteers for events

3.6.5 Event Promotions

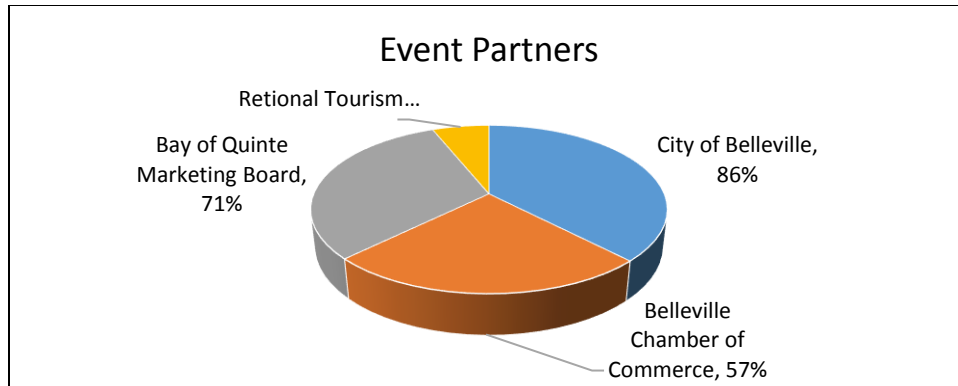
Event planners were asked what mediums they used to promote their events. The most popular response was their own website and social media. Responses were as follows:



Television was not used by any of the event planners in the study group.

When asked if the event planners utilized supporting websites and social media managed by the City of Belleville, Chamber of Commerce and Bay of Quinte Regional Marketing Board the majority of respondents (58%) did not take advantage of this marketing opportunity.

Event planners were asked if they currently work cooperatively with any local/regional/provincial tourism organizations to support their event planning initiatives. The results were as follows:



When asked how they work cooperatively with these organizations, the responses were:

1. Event promotion
2. Assistance with venue and hotel bookings
3. Maps/brochures/guides

3.6.6 Satisfaction Levels with Tourism Facilities in Belleville

Event planners were asked to rate their satisfaction levels with the tourism facilities in Belleville with the following results:

Tourism Facilities	Excellent %	Good %	Fair %	Poor %	Unaware %
Availability of public washrooms	30	20	30	20	
Condition and cleanliness of public washrooms	40	20	30		10
Highway signage	20	40	10	20	10
Highway rest areas		30	10	20	40
Information centres	10	40	10	20	20
Attractions		20	70	10	
Accommodations	20	50	30		
Food services	30	50	20		
Retail	30	40	20		10
Accessibility	40	40	10	10	
Parking	20	40		40	

Higher rated amenities were food services, accommodations, accessibility and retail. Lower rated were attractions and availability of public washrooms. These results were very similar to those recorded from tourism businesses in section 3.2.3.

3.6.7 Future Plans for Events and Festivals

None of the event planners surveyed indicated that they planned to discontinue the event in the next five years. One of the event planners was undecided due to lack of hotel availability in the fall season.

When asked if any major changes were planned for the event in the next five years, 25% of the event planners indicated 'yes'. Changes included inviting more vendors, bringing national championship to Belleville and increasing number of days for event.

3.6.8 Municipal Assistance

The majority of event planners (89%) felt that the municipality could help with the success of their event and take a greater role in events within the City of Belleville. Their suggestions included:

- Funding assistance
- In-kind support
- Assistance in hotel blocking
- Providing a volunteer bank
- More promotion of the event
- Make more equipment and supplies available for use of events
- Less red tape at municipal level
- Help with sponsorships
- Compilation of packages including restaurant information

3.6.9 Training Opportunities

When asked if the event organizers would be receptive to training opportunities for their staff or volunteers to better prepare for and execute the events, 64% said they would be receptive, particularly in marketing and event management in general.

3.6.10 Volunteers

Two-thirds of event planners indicated they had difficulty finding volunteers for their events. Their efforts to recruit volunteers included giveaways for volunteers, ads/social media through Bay of Quinte Regional Marketing Board and word of mouth.

3.6.11 Municipal Role in Tourism

Event planners were asked if the City of Belleville takes an adequate role in tourism development. The results were fairly evenly split with the following comments being offered:

1. More overall beautification is needed in the City of Belleville
2. Bike routes would increase interest in Belleville as an accessible city
3. More police patrols are needed in the downtown core
4. Make funding/grants available for events or services in-kind
5. Need more attractions and 'things to do'
6. Develop waterfront area for events and enjoyment of tourists overall
7. Take a greater role in tourism – don't download everything to Chamber of Commerce

3.6.12 New Tourism Assets

When asked what tourism assets the event planners would like to see pursued/attracted for the City of Belleville that would benefit their event or the community as a whole, the most repeated response was activities for children and youth to do while in Belleville. The list included:

1. Activities for children and youth while they are visiting Belleville
2. Waterfront development
3. Winter events
4. Night life

Primary tourism drivers and attractions in Belleville were considered to be:

1. **Proximity to Prince Edward County – wineries and Sandbanks beach**
2. Fishing events
3. Bay of Quinte boating and fishing

4. Waterfront and outdoors
5. Glanmore House and downtown galleries

3.6.13 New Festivals and Events

Both the tourism businesses and event planners groups were asked their opinion on new events or expanded current events in the City of Belleville what would benefit the tourism industry in the area. Responses had an overarching theme of making events larger with more potential for regional reach particularly in the off season times. Responses included:

1. **Signature larger scale events – particularly in the winter and off season**
2. **More waterfront activities, boating etc.**
3. **More music festivals**
4. **Empire Rockfest could be expanded to include activities in all of downtown Belleville**
5. **Local food and artisan beer/wine events**
6. More events in downtown Belleville
7. Waterfront and Multicultural Festival – increase multicultural component and less midway businesses promotion
8. Need more communication and advertising for festivals and events
9. Highlight agricultural sector
10. More sporting events
11. Cultural and arts events
12. More activity in Market Square

One event planner also noted that events should be required to provide an ‘indoor’ area for some vendors whose products cannot be displayed outdoors (i.e. cheese) and also for people who are not able to withstand the sun/cold and would benefit from participating a protected area.

3.6.14 Barriers to Growth/Success of Festivals and Events

Event planners were asked what they considered to be a barrier to growth/success of events. Responses were as follows:

1. **Lack of support at municipal level, particularly for new events**
2. **Lack of large venues, other than the Sport and Wellness Centre**
3. Lack of downtown parking
4. Upgrades needed at recreation fields
5. Hotel rates
6. Activities for youth
7. Lack of utilities for events

3.6.15 Tourism Conference/Forum

The majority (80%) of tourism business owners and event planners indicated that they would be interested in attending a tourism forum or event/conference if planned and hosted in the City of Belleville.

3.7 Final Comments

When asked for any final comments not covered in the survey, tourism business owners and event planners offered the following:

1. More support for the arts is needed at the municipal level.
2. Need more social and sitting areas in downtown Belleville.
3. Recreation and tourism staff need to work together to present a coordinated approach for the industry.
4. Chamber of Commerce tourist chalet is difficult to access – need signage and better access.
5. Foot traffic needs to increase in downtown Belleville – there is very little to ‘draw’ people to downtown Belleville at the moment. Needs more residential growth offerings.
6. There is a lack of taxis and problems with their service – also bus service is not working well particularly in Bell Blvd. area.
7. Need to better integrate Loyalist College students into the community, particularly downtown.
8. Belleville should partner more and work with Prince Edward County on tourism initiatives.
9. Communication needs to improve regarding tourism, festivals and events.
10. Need more municipal tourism staff and a tourism strategy.
11. A plan is needed for attraction development.

4.0 Summary

The following is a summary of key findings in the 2018 Tourism and Events Sector BRE:

- 55 businesses owners and event planners were interviewed in November and December of 2018 – 43 tourism businesses and 12 event planners.
- Half of tourism business operators, owned their properties.
- The typical visitor to a tourism business in the City fell into the categories of families (with children), repeat visitors, couples and visiting family and friends.
- Most tourism businesses received less than 10,000 visitors/customers per year. The origin of these visitors/customers were primarily local and within 40 kms.
- The ‘busy’ season for tourism businesses in Belleville is summer with an equal distribution for the rest of the year.
- Primary barriers to expansion of tourism businesses in Belleville is staff recruitment and retention.
- The most often used marketing methods for tourism businesses is social media and their website.
- Tourism business owners agree that Belleville is a good area in which to operate a tourism business with the top advantages being the amenities of the Bay of Quinte area and its proximity to Prince Edward County.
- Businesses felt that more progress is needed to develop the waterfront, develop heritage attractions, increase interest in downtown Belleville, increase nightlife and entertainment and create winter activities.
- The major tourism driver in the Belleville area was considered to be Prince Edward County

- Greatest challenges of operating a tourism business in the City was felt to be an underdeveloped downtown core, lack of attractions and municipal resistance to fully embrace tourism activities.
- Highest levels of satisfaction with tourism facilities in Belleville were for accommodations and food services with lower levels showing for public washrooms, information centres and attractions.
- The greatest advantage of doing business in Belleville was thought to be Quality of Life with the greatest disadvantage being availability of skilled labour, local permit process and municipal taxes.
- Tourism business owners felt that the most important factors in remaining competitive are new market development locally, development of partnerships and tourism expansion.
- Most tourism business owners do not have plans to relocate their business in the next 5 years and half plan to expand their operation within the City primarily leading to additional services for customers and an increase in workforce.
- Tourism business owners interviewed employed a collective total of 1341 employees in addition to approximately 120 volunteers. Most positions were part-time. Half of businesses plan to increase their workforce over the next 5 years – an average 5.5 increase.
- Business owners experienced the most difficulty in recruiting employees that have a positive work ethic.
- Two thirds of businesses indicated that the increase in minimum wage had a negative impact on their business.
- Levels of satisfaction were highest with policing, fire services and recreational services. Lower levels of satisfaction were with the building department, street repairs, public transit and roads.
- The majority of tourism businesses and event planners felt that the distribution of the Municipal Accommodation Tax should be directed towards destination marketing efforts.
- Barriers to growth were identified primarily as a difficult permit process and bureaucracy at the municipal level, an underdeveloped waterfront and workforce issues.
- Fewer events are held in winter – all other seasons were evenly distributed
- Most events attracted less than 10,000 visitors annually
- Most visitors to events in Belleville are families, repeat visitors, sports, seniors and visiting friends/families
- Most event attendees are from outside the Belleville area – greater than 40 kms. away and 42% attract a local audience only.
- Prime advantage to operating an event in Belleville was its location on the 401 and between major cities. Challenges were considered to be lack of municipal support and issues in booking at the Sport and Wellness Centre.
- Highest rated tourism amenities in Belleville were rated at food services, accommodations, accessibility and retail. Lower rated were attractions and availability of public rest areas.

5.0 Recommendations

Marketing

1. Develop a marketing strategy based on visitor profile data in section 3.1.3 as well as visitor stats offered by tourism businesses and event planners indicating they were willing to share their tracking data in the survey. Also consider advantages described in sections 3.2.1, 3.2.2 and 3.6.3.
2. Coordinate marketing initiatives with Chamber of Commerce and Bay of Quinte Regional Marketing Board.
3. Work with local representatives of Regional Tourism Organization 9 (RTO 9) to participate in marketing focus of the sub region and also keep abreast of funding opportunities. Invite staff of RTO 9 to the area to showcase tourism amenities and strengthen relationships with the provincial tourism organization. Consider this initiative cooperatively with the City of Quinte West.
4. Review current signage and develop new directional and information signage as required.

Local Community

1. Accelerate and facilitate waterfront development both in the Myers Pier area as well as Zwicks Park.
2. Develop tours in summer months featuring the heritage and historical significance of the City and promote via the City's tour bus.
3. Encourage and support the development of attractions and entertainment/night life to support existing tourism and events. Consider incentives and other forms of assistance.
4. Issue an Expression of Interest (EOI) for a major event to be held in the winter months to draw visitors to Belleville during a normally slower tourist season.
5. Explore the potential of a campground and RV area including dumping facilities for the City to support this industry integral to tourism and many local events.
6. Present a heightened awareness campaign of downtown Belleville. Consider print mediums that will reach all residents of Belleville.
7. Work with the BDIA and downtown businesses on a strategy for consistent and later opening hours particularly to support local theatre, sporting and tourism events.
8. Work with taxi operators to upgrade their service which is vital to assist visitors move within the City to patronize restaurants, entertainment venues and attractions.
9. Review transit/bus service within the City particularly on Bell Boulevard East and West where there is a growing concentration of employees and tourists wishing to access this area including evenings and weekends.
10. Continue to work with providers to ensure high speed internet to all areas of the City of Belleville.
11. Work with Chamber of Commerce to increase visibility and access to the Visitor Information Centre.

Labour Force

1. Promote tourism and hospitality as a viable career option at the school level. Work with Loyalist College to hold trade events to increase interest in this important sector.
2. Work towards affordable housing options to ensure available accommodations for those working in the tourism/hospitality sectors.
3. Increase the City's efforts in workforce development including consideration of training, staffing, workplace experiences and outreach events.

Municipal Services

1. Ensure road repairs and City beautification to a high standard to facilitate tourist satisfaction and pride of place for residents.
2. Work with planning and building officials to create a better understanding of the value of tourism and events to the local economy and subsequently offer a more efficient and welcoming service to this sector.
3. Engage existing tourism businesses in recruitment initiatives to attract more events and tourism start-up businesses.
4. Ensure continued development of w/s infrastructure in areas underserved and restricted by aging or inadequate services – including broadband.

Festivals and Events

1. Review and ensure the Sport and Wellness Centre is affordable and available whenever possible for community and sporting events. Develop a process so that tourism and economic development staff coordinate their efforts to facilitate event success and satisfaction.
2. Work with hotels, restaurants and attractions to ensure current and relevant information is provided to festival and event planners.
3. Review inventory of public rest areas/washrooms and respond to any needs.
4. Develop a volunteer bank to help with festivals and events including those events that are organized by out of town planners who would not otherwise have access to a volunteer list.
5. Consider the creation of an inventory of supplies and equipment to facilitate festivals and events.
6. Work with the BDIA and Chamber of Commerce to expand local events to become 'signature' larger events to attract visitors from outside the region.
7. Consider a higher use for Market Square on off-market days of the week and weekend.
8. Work with local and regional tourism organizations to offer a tourism forum or event for those interested in gaining more knowledge of the area and learning tools to help their event reach its maximum potential.