

OTTAWA'S

**PREMIER RANKED TOURIST DESTINATION
FRAMEWORK PROJECT**

**FINAL
REPORT**

September 2009

Prepared by

BRAIN TRUST
MARKETING & COMMUNICATIONS

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BACKGROUND

The Premier-ranked Tourist Destination Framework (PrTDF) was an initiative developed by the Ontario Ministry of Tourism in 2001. The goal of the PrTDF program is to help destinations across Ontario identify areas for development related to tourism, assess their competitive tourism advantage and ultimately improve to become a destination of choice. Being a *Premier-ranked Tourist Destination* indicates that “here is a place more attractive than the rest, a place the potential tourist visitor should consider first in making travel plans.” To be clear, *Premier-ranked* is not a formal tourism designation but rather is an internal tourism goal for a destination to work towards as it relates to becoming “better than the rest”.

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

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

The Ottawa PrTDF project is an initiative facilitated by Ottawa Tourism, the Ontario Ministry of Tourism, the City of Ottawa, Algonquin College, and tourism industry stakeholders. The funding for the project came from the Ontario Ministry of Tourism, the City of Ottawa and Ottawa Tourism.

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.

The PrTDF project’s scope and focus is on Ottawa and Canada's Capital Region. The region sits on the border between the provinces of Ontario and Quebec in central Canada. Ottawa was made capital of the British colonial Province of Canada in 1857. In the 20th century, a much larger Capital region was created to serve as a frame for Canada’s Capital. Since 1969, Ottawa and Gatineau (two cities that face each other across the broad Ottawa River) and the surrounding urban and rural communities have been formally recognized as Canada’s Capital Region.

Canada’s Capital Region

- Encompasses 4,715 square kilometres of river valley, mountains, wetlands and fields and stretches out on both sides of the Ottawa River to include parts of two Canadian provinces — Ontario (to the south) and Quebec (to the north)
- Lies at 79 metres above sea level and enjoys a “continental” climate (hot and humid in summer, cold and snowy in winter)

- Contains two major cities — Ottawa and Gatineau — as well as numerous small towns and has a total population of 1.130 million (as of 2006)
- One of Canada's most bilingual communities, with nearly half a million people speaking both English and French

The tourism consulting firm BRAIN TRUST Marketing & Communications was retained in January 2009 to assist with the design and implementation of the process and the analysis of the audit results and preparation of the final report.

Unlike other destinations that have undertaken the project where an audit team was hired, the audit was completed by faculty and students from Algonquin College. They assisted in the development and completion of an Ottawa PrTDF tourism resource inventory. The resource inventory was carried out in the form of a comprehensive collection and understanding of tourism establishments in the greater Ottawa area. The inventory took into account establishments from the accommodations, food and beverage, attractions, arts and culture, outdoor recreation, events, meeting/convention/conferences, planning, heritage and retail sectors. Inventory results were compiled in a comprehensive database maintained by the Audit Team. The inventory formed the basis of the understanding of Ottawa's tourism offering.

The consultant worked with Ottawa Tourism staff, Algonquin College students and staff, the PrTDF Steering Committee and the PrTDF Sector Champions to establish the PrTDF process for Ottawa. This collection of individuals also served to review the results, assess current industry strengths, weaknesses, attributes, product/service gaps, factors and conditions that impact existing and future development plans and to also identify potential opportunities and partnerships within the tourism industry. Based on feedback and comments received from the Sector Champions and the industry at a number of meetings and through individual conversations, recommendations for inclusion in the final report were developed.

PROJECT PROCESS

November 2008	Brain Trust meets with Ottawa's PrTDF Steering Committee to discuss project objectives and approach
December 2008	Ottawa Tourism submits its PrTDF project application to the Ontario Ministry of Tourism
January 2009	Ottawa Tourism receives approval from the Ministry of Tourism to undertake the Premier-ranked Tourist Destinations Framework
January 2009	Brain Trust develops and receives approval for Ottawa's PrTDF approach
January 2009	Brain Trust meets with and briefs Algonquin College faculty and develops the project inventory/audit methodology
February 2009	PrTDF Project launch meeting with Ottawa's tourism industry
February 2009	Ottawa's PrTDF audit/inventory begins
March 2009	Consultant meets with senior staff and a variety of industry leaders to discuss Ottawa's tourism opportunities and challenges
March 2009	Sector Champions meeting held to discuss Ottawa's tourism opportunities and challenges as well as review and validate preliminary findings and provide project status up-date
April 2008	Audit/inventory complete, Resource Audit and Opportunity Matrix complete, PrTDF Workbook complete, preliminary findings and observations developed by Brain Trust
May 2008	Industry consultation meetings held to garner feedback and validation of preliminary findings and observations
June 2009	Validated findings, observations and DRAFT recommendations presented to PrTDF Steering Committee for validation - recommendations are endorsed
June 2009	Ottawa's DRAFT PrTDF Recommendations presented to Ottawa's tourism industry at Ottawa Tourism's Annual General Meeting. Industry given 2 weeks to offer feedback and input
July 2009	Consultant prepares and delivers Final PrTDF Report

It can be safely said that, as a result of this consultative process, the tourism industry in Ottawa and the Capital Region have 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 Canada's Capital.

INTRODUCTION

WHAT IS THE PREMIER-RANKED TOURIST DESTINATION FRAMEWORK?

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

**"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. Meeting these requirements is essential in order to grow tourism revenues for the destination and its tourism shareholders.

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

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

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

The Workbook serves as a manual that:

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

The Resource Audit is made up of four components:

- 1) Conducting a **Tourism Industry Inventory**.
This component of the framework allows a destination to engage the tourism industry stakeholders and to acquire a snapshot of their current product and performance and understand their plans for future development.
- 2) Competition of the **Tourism Resource/Opportunity Matrix**.
The opportunity Matrix looks at 123 opportunities in the areas of:
 - 1) Water-based Recreation Opportunities;
 - 2) Land-based Recreation Opportunities;
 - 3) Land and Water-based Opportunities;
 - 4) Natural Resource Opportunities;
 - 5) Cultural and heritage Resource Opportunities;
 - 6) Built Recreation/Commercial Infrastructure.
- 3) A **Travel Trade Resources Checklist**.
- 4) A **Transportation Resources Checklist**.

PURPOSE FOR THE PRTDF IN CANADA'S CAPITAL

By undertaking the PRTDF project, the leaders in The Capital Region's tourism industry are indicating a desire to move their destination to the next level. Through Ottawa Tourism the industry will have an accurate assessment of the destination's strengths and deficiencies and more importantly, a clear plan for improvement.

The PrTDF process allows the industry to analyze base data, benchmark areas of improvement for the future and work more collaboratively towards a visitor/customer-first philosophy in destination development in attracting and retaining tourists to its community. It sheds light on development, infrastructure, training and investment needs. The process defines the destination's strengths, product clusters and identifies major trip motivators and markets as well as opportunities to work collectively with all involved in tourism. The process in itself was deemed to be an opportunity to foster greater communication, networking and industry relations within the tourism sector, business community and with several levels of government.

PRODUCT, PERFORMANCE, FUTURITY: THE THREE ASSESSMENT MEASURES

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

THE PRODUCT DIMENSION:

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

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

THE PERFORMANCE DIMENSION:

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

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

THE FUTURITY DIMENSION:

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

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

PRTDF PROCESS

The PrTDF has been designed in a three stage process of evaluation, interpretation and planning. These stages and their respective steps are:

EVALUATION:

- Step 1 - Complete the Resource Audit;*
- Step 2 - Measure destination product;*
- Step 3 - Measure destination performance;*
- Step 4 - Measure destination futurity.*

INTERPRETATION:

- Step 5 - Complete the destination Performance Summary;*

Step 6 - Report Observations from PrTDF Process

PLANNING:

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

EVALUATION PROCESS

Ottawa'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 PrTDF 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 questions are recorded with a checkmark in the appropriate box (Yes, "A" or No) on the work page, and transferred to the Performance Summary Form provided in the Workbook.

COMPLETING THE RESOURCE AUDIT

Completion of the Resource Audit was the first step in the destination assessment process. The Audit relied on the following four supporting tools:

- 1) Tourism Industry Inventory;
- 2) a Tourism Resource/Opportunity Matrix;
- 3) a Transportation Resources Checklist and;
- 4) a Travel Trade Resources Checklist.

TOURISM INDUSTRY INVENTORY

Students and faculty from Algonquin College completed an exhaustive inventory of the region's tourism assets. They relied on a number of valuable sources to complete the inventory including, but not limited to, Ottawa Tourism's membership data base, the City of Ottawa's tourism industry inventory, the National Capital Commission's tourism industry profiles, a variety of tourism industry publications, tourism web sites and other consumer focused publications. In addition, students conducted telephone and web research to support information found in published sources. Students also interviewed a variety of tourism industry stakeholders.

Secondary research also supported the completion of the inventory. A variety of research studies were collected and reviewed. These were studies general in nature pertaining to tourism industry trends and / or studies specific to certain areas of tourism related to Ottawa. Performance data was gathered utilizing statistics from Ottawa Tourism, the Ottawa Gatineau Hotel Association, Tourisme Outaouais, the Ontario Ministry of Tourism, Statistics Canada and the National Capital Commission.

TOURISM RESOURCE/OPPORTUNITY MATRIX

The Tourism Resource/Opportunity Matrix was used as a tool to guide consideration of the asset base and the resources contributing to the current market penetration of the tourist destination area. Ultimately, the geographic markets from which it is reasonable to expect future visitation to occur are revealed. It is also used as an aid to identifying product gaps and opportunities for future product development and as a summary reporting form.

THE TRANSPORTATION RESOURCES CHECKLIST

The Transportation Checklist was completed by the audit team using information gathered from local sources.

THE TRAVEL TRADE RESOURCES CHECKLIST

The Travel Trade Resource Checklist was completed by the audit team using information gathered from local sources.

STARTING FROM A POSITION OF STRENGTH

Ottawa and Canada's Capital have a significant number of tourism assets in which to build and enhance its performance in the tourism marketplace. Its success within the tourism industry positions the destination well. While the work in this report outlines what the industry needs to do to move to the next level of success, it will do so based on starting from a position of strength. These assets include:

- Breadth and depth of visitor experiences
- Attractors and demand generators that have quality & critical acclaim
- Significant annual visitation from both leisure and business travellers
- Accommodations that are excellent with better than average occupancy
- Envious overnight and day trip expenditures
- An engaged industry with desire to improve and get to the next level
- A strong Destination Marketing Organization with resources to market and sell
- The City of Ottawa who is engaged in development of tourism infrastructure, events, cultural attractions

PRODUCT

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

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

The following product characteristics reveal Ottawa's product attributes:

DISTINCTIVE CORE ATTRACTORS

This section assesses what it is about a destination that makes it stand out as distinctive, how the attractors are distinguished and how they are relevant to market wants. The evaluation process has identified Ottawa's core attractors, their distinctiveness, and the nature and size of the visitor markets to which they are to be considered to be attractive.

***Core attractors** should meet at least two of the following criteria:*

- *Attract a significant number of visitors annually*
- *Have a physical or historical link to the destination*
- *Be a destination landmark*

Definition - Core Attractor: The features, facilities, and/or experiences which act as the primary motivators for most travel to the destination; the attractors with the most tourist visits in the destination. Core attractors can differ from season to season, for example golf vs. skiing at a four seasons resort destination. They can overlap or be distinctly different and appeal to differing visitor segments, e.g., taking in a concert at the National Arts Centre vs. attending a corporate meeting at one of the several hotel conference facilities ; or mass vs. niche segments, e.g., visiting the Parliament Buildings vs. attending a performance of chamber music at a local church. A core attractor can also be a cluster of assets all relating to a specific theme, e.g., dining, shopping, entertainment and night life in downtown Ottawa; or an experience enabled by clustering, e.g., visiting the ByWard Market combined with a cruise on the Rideau Canal.

OTTAWA'S CORE ATTRACTORS

- **Canada's Capital, the Seat of Government and Federal Attractions**
- **Festivals and Events**
- **Outdoor Recreation Cluster**
- **Spectator Sports**
- **Culture, Performing Arts Cluster**
- **ByWard Market**
- **Gaming**

Canada's Capital, the Seat of Government and Federal Attractions

The destination enjoys success as a result of this primary demand generator. As the nation's capital and the seat of government Ottawa sustains a relatively healthy and vibrant tourism industry. Visitation levels are impacted dramatically because this is Canada's capital. The destination benefits from the number of national culture and heritage attractions that are located here. Visitors, Canadians in particular, make Ottawa a destination of choice in order to experience their nation's capital and all that entails. The historic and picturesque buildings that occupy and surround Parliament Hill attract travellers from around the globe. In addition the destination enjoys annual visitation that can be directly attributed to business dealings related to the federal government.

Canada's Capital is:

- Home to 12 national museums (29 museums in total), the National Gallery, the National Arts Centre, other national historic sites and a variety of events including Canada Day celebrations, 2008 museum attendance was 3.5+ million
- Parliament Hill, Rideau Hall, Laurier House, Rideau Canal & Skateway (UNESCO World Heritage Site), Mackenzie King Estate, Sussex Drive, Confederation Blvd.
- Attractions offer a special draw and have strong year-round appeal and demand
- Canadians see the Capital as a nationally significant place to experience Canadian heritage, culture, and achievements, and as a source of pride*

*March 2008, National Survey on Pride and Identity, NCC

Festivals and Events

The destination has a long-standing reputation as the city of festivals and events. Canada Day celebrations are certainly the most publicized and well known, however, Ottawa’s Winterlude has recognition across the country and around the world. Events receive significant annual visitation with a variety of event offerings 12 months of the year. These festivals and events go a long way to help position the destination. Many fit perfectly and reinforce Ottawa’s brand imagery; a destination that is impressive yet intimate, urban yet unspoiled and cultured yet comfortable.

Ottawa’s Festivals and Events:

- 60+ annual festivals and events that attract 3 million+ attendees annually*
- Supports over 1,100 jobs and 15,000 volunteers
- Total economic activity attributable to just 21 of the region’s more than 45 festivals was \$94-million 2003 Ottawa Festival Visitor Impact Study
- 2008 Winterlude generated \$63 M directly and \$159 M to the region at large
*Visitor vs. local resident #'s not available
- 230,000 person visitors motivated to travel by F&E - 192,000 stayed overnight
- 2009 Race Weekend attracted 36,694 participants, 48% from outside greater Ottawa and generated \$20 million in economic impact (Race Weekend Estimates)

Festivals & Events Reported Attendance

EVENT	ATTENDANCE	YEAR
Winterlude	457,700	2009
Ottawa Race Weekend	100,000	2009
Tulip Festival	500,000	2008
Canada Day	450,000	2008
Festival de montgolfières	350,000	2008
Cisco Bluesfest	300,000	2007
TD Canada Trust Jazz	169,000	2007
SuperEx	365,000	2007

Outdoor Recreation Cluster

One of the capital regions most compelling tourism assets is its wealth of outdoor recreation opportunities. Residents of the region use the multitude of outdoor recreation opportunities to enhance their own active lifestyle. Visitors therefore benefit and take advantage of these assets while visiting the nation’s capital. Outdoor activities are available year-round which enhances Ottawa’s ability to attract visitation even in the winter months.

Outdoor recreation:

- Attracts close to 1 million visitors annually
- Cyclists and in-line skaters enjoy the Capital Pathway, which consists of 170 kms of recreational pathways and is the most extensive off-road, multi-use system of its kind in North America, combine that with Gatineau Park and the region possesses a wealth of four season outdoor activities
- The Rideau Canal with its UNESCO status attracts residents and visitors for hiking, cycling, walking, rollerblading, ice skating, boating
- Water is at the core of many outdoor experiences, sailing, swimming, wind surfing, ice skating
- Rideau Canal, Dows Lake, Ottawa River

Spectator Sports – Professional & Amateur

Ottawa has been proactive in attracting annual and one-off sporting events. The destination offers an impressive inventory of sports venues and facilities and is home to a number of professional and amateur sports franchises. Its success at playing host to major international events has gone a long way to position the destination as a vibrant and active city. The City of Ottawa in partnership with the private sector proactively goes after major international events in order to attract visitation and raise the profile of the destination.

Ottawa's sports offerings include:

- The NHL's Ottawa Senators, the Titans Junior A lacrosse team, the 67's and Olympiques CHL hockey teams , the Fury soccer team
- Annual events HOPE Beach Volleyball Fest, Dragon Boat Race, Ottawa National Capital Marathon and Raceday, the Annual Terry Fox Run, the Canadian Ski Marathon, the Bell Capital Cup
- International, national, provincial sporting events:
 - 2009 World Junior Hockey Tournament
 - 2008 Ontario Summer Games
 - 2007 FIFA U-20 World Cup Canada 2007
 - 2006 Canadian Track and Field Championships
 - 2006 Anton Furlani International Cup Volleyball
- 59 public golf courses in the region

Culture Performing Arts Cluster

Ottawa is fast becoming a leading centre for performing arts. Supported by a number of established and new performing arts venues the destination annually presents a wide variety of cultural entertainment. Annual music festivals in a range of genres sprinkle the calendar and offer support to the long list of entertainment options presented daily in the destination. This all serves to enhance Ottawa's vibrant night life and urban entertainment scene which attracts and extends the stay of many visitors.

Culture in Ottawa is:

- The National Arts Centre which boasts annual performances from a wide variety of internationally renowned artists
- Theatre du Casino, the GCTC, CentrepoinTE Theatre, Ottawa Little Theatre present live theatre and concerts
- The Ottawa Chamber Music Society and Ottawa Symphony Orchestra are part of a vibrant music scene
- Over 40 local establishments who regularly feature live music, concerts and performances
- Festivals support the culture scene - TD Canada Trust Ottawa Jazz Festival, the Cisco Bluesfest and the International Chamber Music Festival to name but a few

ByWard Market

A highly entertaining and interesting corner of Ottawa's downtown presents visitors with a chance to experience the personality and charm of the destination. The ByWard Market, which has evolved to become a year-round tourist destination, serves up a variety of experiences unique to Ottawa. A busy spot day or night, the market is a collection of dining, retail and entertainment options that interest locals and visitors alike.

The ByWard Market:

- Is one of Canada's oldest and largest public markets with vendors who offer a wide variety of food products, much of it locally grown
- Consists of museums, cafés, specialty food shops, boutiques, galleries, restaurants, pubs, and salons
- Is in close proximity to Rideau Centre shopping mall which supports and enhances the destination's overall retail experiences

Gaming

The destination offers one of the countries most exciting gaming experiences. The Casino Lac-Leamy, located in Gatineau, Quebec, is minutes from downtown Ottawa and attracts visitors from a significant number of locations. .

- Casino Lac-Leamy
 - 60 gaming tables, 1,900 slot machines, 12 Texas Hold'em poker tables
 - 3 restaurants, 2 lounges, 2 reception halls
 - 1100 seat Casino Theatre
 - Attracts 4+ million visitors annually, 174,000 person trips, 154,000 stayed overnight
 - Employs over 1,000 people
- Rideau Carleton Raceway is a racing and gaming entertainment destination with standardbred harness horse racing, Teletheatre wagering and 1,250 slot machines

OTHER PRODUCT ATTRIBUTES

- Core attractors are relevant to both mass and niche tourist markets
- Because of the core attractors Ottawa stands out as distinct from its competition
- Products attract guests from beyond Ontario's borders, 35% in 2007
- Ottawa offers a range of memorable experiences that sustain interest for 24+ hours, average stay is 3 nights
 - Visitors from Ontario – 2.6 nights
 - Visitors from Canada – 3.0 nights
 - Visitors from U.S. – 3.4 nights
 - Visitors from Overseas – 4.8 nights
- Attractors *do* attract year-round visitation

Quarter	Visitors				Spending	
	2006		2007		2006	2007
January - March	1,717,989	23.0%	1,569,770	20.6%	\$200,150,813	\$200,099,041
April - June	1,703,092	22.8%	1,895,939	24.9%	\$262,519,077	\$308,006,768
July - September	2,154,974	28.8%	2,318,288	30.5%	\$362,290,144	\$382,992,195
October - December	1,903,129	25.4%	1,823,609	24.0%	\$302,827,704	\$284,345,281
Total	7,479,183	100%	7,607,605	100%	\$1,127,787,738	\$1,175,443,285

- Ottawa offers experiences at a variety of price points that are easy to buy
- The destination has a wide variety of dining options available at a variety of price points
 - Many have accredited chefs and a wine list with 25+ labels
 - Many with name recognition beyond the local region
 - Several restaurants feature local cuisine
- The destination has a wide variety of shopping and retail experiences available many with name recognition beyond the local region
- It is not known if Ottawa is considered friendly or hospitable offering good value for money
 - No quantifiable information is gathered to monitor guest satisfaction levels on a region-wide basis, individual businesses may monitor satisfaction levels but this information is not shared
- The destination has a visitor market (s) in close proximity. The nearest major market is less than 2 hours away with a population of 3.6 million; 4+ million people live within 3 hours
- Travel from nearest urban centres is pleasant and comfortable; major highways and secondary roads are in good condition in all seasons; winter driving can be challenging at times but for the most part all roads are well maintained during the winter months
- Once in the destination, visitor services and attractions may not be well signed and therefore create confusion for those visiting in personal vehicles

- Alternative modes of travel, other than personal vehicle, are available; the destination is served well by scheduled air, train, motor coach services, taxi and limo services
- Given the destination's proximity to a variety of bodies of water visitor boat slips are not readily available, when they are available they are not in close proximity to core attractors or the commercial accommodation base
- Ottawa has a variety of branded and well known accommodation options, 12,676 rooms, at a variety of quality levels and price points and in close proximity to core attractors

CLASS	PROPERTIES	ROOMS	PRICE RANGE
RV Parks	3	496	\$65 or less
Campgrounds	20	NA	\$20 +
Bed & Breakfast	16	134	\$65 - \$199
Hunting, Fishing Camps/Lodges	15	NA	\$50 +
Motels – Independent	3	71	\$66 - \$149
Motels – Chain	1	46	\$66 - \$99
Hotels – Independent	8	2059	\$100 +
Hotels - Chain	41	9870	\$100 +
TOTAL	107	12,676	

PERFORMANCE

The PERFORMANCE elements, criteria and measures identify the extent to which the destination is successful and recognized in the market place.

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

- 7,607,605 person trips in 2007
 - 3,693,144 stayed overnight (1,442,000 VFR)
 - 3,914,461 on day trips
- Total spending by visitors in 2007 - \$1.176 B
 - Overnight - \$887.1 M
 - Same day - \$288.3 M
- Per person overnight trip expenditure - \$300; greater than the \$298 Ontario average
- Per person day trip expenditure - \$191; greater than the \$165 Ontario average

	Visitors		Spending	
	2006	2007	2006	2007
Canadians	6,604,501	6,748,741	\$857,083,445	\$900,837,602
Americans	453,088	480,538	\$104,442,351	\$122,003,279
Overseas	421,595	378,327	\$166,261,942	\$152,602,405
Total	7,479,183	7,607,605	\$1,127,787,738	\$1,175,443,285

- Overnight visits 2007:
 - 52% Ontario, 29% other provinces
 - 10% international markets, 9% U.S.

	Overnight Visitors		Spending	
	2006	2007	2006	2007
Canadians	3,130,489	3,088,599	\$610,287,239	\$626,235,208
Americans	279,044	288,909	\$89,998,965	\$111,419,675
Overseas	344,128	315,635	\$162,548,249	\$149,491,474
Total	3,753,661	3,693,144	\$862,834,453	\$887,146,358

- Day Trips 2007:
 - 70% Ontario, 21% other provinces, 7% U.S., 2% international markets

	Same-day Visitors		Spending	
	2006	2007	2006	2007
Canadians	3,474,011	3,660,141	\$246,796,206	\$274,602,393
Americans	174,044	191,628	\$14,443,386	\$10,583,604
Overseas	77,467	62,692	\$3,713,694	\$3,110,930
Total	3,725,522	3,914,461	\$264,953,286	\$288,296,928

- Main Purpose of Trip – Person Visits 2007
 - Pleasure – 2,305,000
 - VFR – 2,603,000
 - Biz/Personal – 1,262,000

Purpose	Visitors				Spending	
	2006		2007		2006	2007
Visit friends or relatives	3,354,644	44.9%	3,402,895	44.7%	\$346,434,449	\$354,785,973
Pleasure	2,896,242	38.7%	2,831,375	37.2%	\$506,808,417	\$511,507,804
Business	643,241	8.6%	822,558	10.8%	\$187,772,992	\$243,720,010
Other/not stated	585,056	7.8%	550,777	7.2%	\$86,771,880	\$65,429,499
Total	7,479,183	100%	7,607,605	100%	\$1,127,787,738	\$1,175,443,285

- Total Nights Spent, Accommodation Used 2007
 - Total Person Nights – 9,256,000
 - Roofed Commercial – 2,709,000
 - Private Home/Cottage – 6,041,000

Accommodation Type	Visitors			
	2006		2007	
Hotel	1,207,433	16.1%	1,218,204	16.0%
Motel	120,881	1.6%	99,059	1.3%
Bed and breakfast	22,961	0.3%	15,190	0.2%
Other paid roofed accommodation	85,471	1.1%	54,121	0.7%
Campground/RV park or camping	76,568	1.0%	43,449	0.6%
Home of friends/relatives	2,130,558	28.5%	2,228,313	29.3%
Other unpaid accommodation	111,866	1.5%	44,707	0.6%

- Guest expenditures make a positive contribution to the local economy
 - \$760 M in direct, indirect, induced contributions to GDP
 - \$467.7 M in labour wages and salaries
 - 13,459 direct, indirect and induced jobs
 - \$430.5 M in total taxes, \$30.4 M in municipal taxes

Source: Statistics Canada - TSRC / ITS, 2007, Tourism in Canada's Capital Region – National Capital Commission Report, June 2009, unless otherwise stated

OCCUPANCY AND YIELD

- 70.5% hotel occupancy 2008
 - 2.7 M room nights sold
 - average rate \$139.28
 (2008 Hotel Base Monitor, Conference Board of Canada)

Ottawa-Gatineau Hotel Indicators

Indicator	2008				2007			
	Oct.	Nov.	Dec.	YTD	Oct.	Nov.	Dec.	YTD
Hotel Occupancy	77.2%	70.8%	54.6%	70.5%	79.6%	70.2%	50.4%	70.3%
Room Nights Sold ¹	239,891	220,004	175,320	2,666,222	247,349	218,139	161,833	2,651,762
Average Daily Rate	\$142.64	\$140.52	\$132.38	\$139.28	\$136.66	\$130.44	\$123.50	\$129.94

¹ Room nights sold based on the 10,358 rooms available by OGHA members.

Average Daily Rate by Geographic Region (Ottawa-Gatineau)

Region	2008				2007			
	Oct.	Nov.	Dec.	YTD	Oct.	Nov.	Dec.	YTD
Central	\$147.65	\$143.69	\$131.62	\$141.88	\$144.62	\$136.67	\$129.20	\$135.44
Southeast	\$112.43	\$106.30	\$109.35	\$108.83	\$104.19	\$101.44	\$97.97	\$102.71
West	\$145.19	\$144.82	\$146.59	\$142.86	\$123.26	\$123.60	\$115.38	\$120.63
Outaouais	\$136.25	\$138.24	\$136.04	\$135.43	\$133.87	\$127.06	\$123.34	\$127.19

Room Nights Sold by Rate Type²

Origin	2008				2007			
	Oct.	Nov.	Dec.	YTD	Oct.	Nov.	Dec.	YTD
Rack/Premium	23,156	20,407	16,262	256,716	N/A	N/A	N/A	N/A
Corporate/Govt.	82,311	77,648	61,877	890,077	N/A	N/A	N/A	N/A
Leisure	36,832	39,246	31,275	501,057	N/A	N/A	N/A	N/A
Group Convention	59,490	54,614	43,521	579,810	N/A	N/A	N/A	N/A
Tour (Group)	12,320	3,941	3,140	N/A	N/A	N/A	N/A	N/A
SMERF	11,087	9,441	7,523	121,369	N/A	N/A	N/A	N/A
Long Stay & Crews	11,039	11,924	9,502	143,685	N/A	N/A	N/A	N/A
Tour (FIT)	3,657	2,783	2,218	N/A	N/A	N/A	N/A	N/A

² Room nights sold by rate type are estimated based on surveys providing rate type breakdowns.

Note: The breakdown of room nights sold by rate type was different in 2008 than 2007, therefore a comparison is not available (N/A). Also, Tour (Group) and Tour (FIT) are new categories as of July 2008, therefore year-to-date figures are not available (N/A).

Air Passenger Traffic—Ottawa Airport⁷

	2008				2007			
	Oct.	Nov.	Dec.	YTD	Oct.	Nov.	Dec.	YTD
Domestic	289,862	245,086	248,777	3,255,541	282,215	264,126	239,150	3,052,813
Trans-border and Other International	73,495	68,816	92,489	1,083,684	77,663	68,263	90,337	1,035,715
Total	363,357	313,902	341,266	4,339,225	359,878	332,389	329,487	4,088,528

Source: Ottawa International Airport.

⁷ Enplaned and deplaned passengers processed through the passenger terminal building.

Museum Attendance

	2008				2007			
	Oct.	Nov.	Dec.	YTD	Oct.	Nov.	Dec.	YTD
Royal Canadian Mint	5,992	4,354	3,526	111,023	6,175	4,012	6,890	115,260
Canadian Museum of Civilization	88,299	57,714	52,321	1,216,984	99,684	55,725	57,655	1,282,400
Canadian War Museum	30,854	36,732	23,766	480,235	31,517	34,968	22,018	509,791
Rideau Hall	8,488	1,092	658	98,705	8,529	1,259	252	132,308
Canada Agriculture Museum	13,413	4,759	2,390	158,459	12,945	4,905	2,376	165,473
Canada Science & Technology Museum	18,174	22,269	17,760	329,366	19,026	19,425	17,150	333,269
Canada Aviation Museum ⁸	76	2,693	6,239	130,033	9,529	10,090	6,742	165,267
Canadian Museum of Nature	12,168	13,698	11,478	236,134	13,060	12,486	11,249	250,768
National Gallery of Canada	22,651	21,366	19,738	356,675	23,447	20,864	16,995	481,762
Parliament Hill	25,362	15,966	12,765	355,326	24,264	16,260	12,458	366,536
Currency Museum	2,102	1,506	1,236	41,594	1,928	1,654	768	42,175
Supreme Court of Canada	1,930	1,119	679	39,857	1,356	1,570	358	42,013
Canadian Museum of Contemporary Photography ⁹	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Total Attendance	229,509	183,268	152,556	3,554,391	251,460	183,218	154,911	3,887,022

Source: Participating attractions (methods of measurement may vary between attractions).

⁸ Canadian Aviation Museum was closed from September 2 to November 19, 2008 for renovations.

⁹ Museum of Contemporary Photography is closed for renovations.

Meetings/Convention Business ⁴								
Indicator	2008				2007			
	Oct.	Nov.	Dec.	YTD	Oct.	Nov.	Dec.	YTD
Number of Meetings/ Conventions	385	397	227	3,595	152	129	38	1,143
Number of Room Nights	32,478	27,550	10,743	284,862	32,809	25,975	8,522	237,862
Number of Delegates	52,851	58,561	10,912	568,468	34,424	25,599	8,535	231,333

⁴ Meetings/conventions reported are from participating hotels only and have not been adjusted to account for hotels that did not participate in each month's survey. 2007 figures are **not** comparable because last year's survey only asked about conventions.

Motor Coach Business ⁵								
Indicator	2008				2007			
	Oct.	Nov.	Dec.	YTD	Oct.	Nov.	Dec.	YTD
Number of Motor Coach Groups	753	77	33	2,658	304	67	61	1,718
Number of Room Nights	6,423	1,459	601	54,824	6,780	1,033	991	42,440

⁵ Motor coach business is from the hotels that reported some level of motor coach activity each month. It has not been adjusted to account for hotels that did not report their motor coach activity in each month's survey.

CRITICAL ACCLAIM

Seven of Ottawa's best-loved events have been named among the province's Top 100 festivals by Festivals and Events Ontario. These include the Canadian Tulip Festival, The Ottawa Rideau Canal Festival, the TD Canada Trust Ottawa International Jazz Festival, the Cisco Ottawa Bluesfest, Canada Day, Winterlude and the Ottawa International Chamber Music Festival. The Rideau Canal festival won "Best New Festival" of 2008 at the Festivals and Events Ontario Conference in March 2009.

The Ottawa Race Weekend was recently reviewed in the "101 races to run before you die" newsletter, by www.runabroad.com

Two local spas are on the Travel to Wellness Canada's list of Canada's Best Spas (33 in total)

- Holtz Spa won Best New Alternative Therapy Treatment.
- The Wakefield Mill Inn and Spa was named Best for Romance.

For the 4th straight year, the Ottawa International Airport placed 2nd overall in *Airport Service Quality* for worldwide airports that serve up to 5 million passengers. The program has 108 participants and Ottawa was recognized for its excellent customer service.

McGee's Inn, Ottawa was selected for the second year in a row as one of the Best B&B's in Canada in the annual Best of BedandBreakfast.com Awards, 2008-2009. The Best of BedandBreakfast.com Awards are based upon a qualitative and quantitative review of the nearly 50,000 independent reviews submitted to BedandBreakfast.com, the leading online B&B directory and reservation network worldwide.

FUTURITY

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

***Futurity** identifies the extent to which Ottawa 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 Ottawa targets viable markets, invests in managing and promoting its tourism marketplace, and consults with the travel trade serving the region. The evaluation identifies if Ottawa is actively matching its product to the expectations of the tourism marketplace and is taking advantage of the knowledge of its travel trade customers.

- Destination Marketing Organizations *are* in place
 - Ottawa Tourism
 - Tourisme Outaouais
- Marketing Strategies are in place for both Ottawa Tourism and Tourisme Outaouais
- A Destination Development Strategy is not in place for the destination
- The DMO's *are* funded to reach target markets
 - Marketing & Sales represents 82% of the overall budget for Ottawa Tourism
- Harris Decima Research tracks advertising for Ottawa Tourism
 - Most recent report indicates a 75% campaign ad recall in key markets and 55% of planned trips are as a result of advertising
- Reference was made to the lack of attention given to promoting tourism infrastructure and business beyond the City's core

PRODUCT RENEWAL

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

- In the past 5 years significant investments in product and experience enhancements have been made in the destination

Project	Investment
Ottawa Convention Centre	\$180 M
Museum of Nature	\$152 M
Airport Expansion – Phase I & II	\$400 M
Canada Aviation Museum	\$3.5 M
Calypso Park	\$50 M
Alottawata Water Park	\$30 M

MARKET DEMAND

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

Market demand for a destination’s tourism experiences can be best determined by using a combination of indicators. Travel intentions, activities and motivations of travellers can provide useful information to help determine if the destination has what travellers are looking for. In the case of Ottawa the 2006 Travel Activities and Motivations study indicates that the destination has what customers want in varying degrees.

Canadians who visited Ontario from another province are more active than other Canadian Pleasure Travelers in culture and entertainment pursuits while on trips. Relative to other Canadian Pleasure Travelers, they were more likely to have attended a literary or film festival and live art performances (e.g., high art performance, live theatre, musical concerts), to have gambled in a casino and to have taken part in a wine, beer or food tasting while on trips. They are also quite active in outdoor activities while they travel and were especially likely to have exercised, jogged or cycled and to have gone skiing (e.g., cross-country skiing, downhill skiing) during the past two years.

Canadians who visited Ontario prefer vacations that provide intellectual stimulation, learning opportunities (e.g., learn about the history and culture of the destination), novelty and an opportunity to renew connections with friends. This suggests that Ontario and Ottawa should market itself as a place with novel and intellectually stimulating activities and attractions.

Over the last two years, 27.0% of adult Canadians (4,076,814) took an overnight trip to Ontario from another province. 72.8% (2,942,654) of those who took a trip to Ontario report taking a “pleasure trip” to the province. Overall, 26.1% of the Canadian Pleasure Travelers from other provinces reported taking at least one pleasure trip to Ontario during the past two years. Ontario was the most frequently visited Canadian destination by Canadian Pleasure Travelers who visited another province in Canada.

Those U.S. Travelers who visited Ontario are much more likely than other U.S. Travelers to have attended theatre, film and music festivals, high art performances and professional sporting events while on trips. They are also more likely to have taken part in participatory cultural activities (e.g., participatory historical activities, aboriginal cultural experiences, archaeological digs and sites) while traveling. They were more than twice as likely to have skied (e.g., cross-country skiing, downhill skiing) and more likely than the average U.S. Pleasure Traveler to have gone golfing, horseback riding, sailing and surfing and cycling while on trips. They prefer luxury accommodation and fine cuisine. They were also more likely to have taken winery tours, city tours and cruises on the St. Lawrence River or Great Lakes during the past two years.

Source: Travel Activities and Motivations Survey (TAMS) 2006 Survey

There is market demand demonstrated through travel intentions indicators

- **Americans** intending to visit Ottawa on pleasure trip spring 2009:
 - Feb 08 2%
 - Feb 09 3%
- **Canadians** intending to visit Ottawa on pleasure trip spring 2009
 - Feb 08 10%
 - Feb 09 12%

Source: Ontario Ministry of Tourism, Travel Intentions Study Wave 11 (February '09)

MANAGING WITHIN CARRYING CAPACITIES

This section assesses the extent to which Ottawa 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, and its administrative systems. The evaluation documents Ottawa's ability to manage the system that sustains it.

Unfortunately the audit team was unsuccessful in obtaining quantifiable data related to the majority of this section of the PrTDF Workbook. While several attempts were made, students and faculty could not source the information. However given the size and nature of the City of Ottawa and Canada's Capital region, we have made an assumption that most of the measurable characteristics defined in the study as important to sustaining long-term growth are being monitored and are in place.

Visitor Services

Region-wide customer service is not in place. Individual business may offer service training but this is not done on an industry-wide basis. Servicing visitors while in the destination is reported to be mediocre at best. Improvements to the Capital Info Centre, located opposite the Parliament buildings, have been in the planning stages for several years however have not yet been implemented. While visitor services are made available in both official languages (English and French) there is some inconsistency reported in the delivery of this service in all tourism businesses. It was further reported that offering other language services (verbal or written) is lacking.

Labour Supply

The tourism industry indicated through anecdotal comment during the consultation sessions that the ability to draw consistent quality labour and associated employer costs are challenges facing the local tourism industry.

A recent study released by the Canadian Tourism Human Resource Council (CTHRC) shows that "in the years ahead, the challenge of finding enough people to fill tourism jobs will intensify - so much so that missed opportunities and the inability to meet potential business could cost the industry billions of dollars. By 2025, the potential labour shortage could reach 384,000 full-year jobs. This shortage represents the cumulative effect of missed opportunities and unfulfilled demand from 2005 to 2025. The CTHRC estimates labour demand could grow by as much as 33% in that time. Potential tourism labour shortages by province indicate Ontario will likely experience the most significant shortage. But, when looked at as a percentage of labour demand, Atlantic Canada, Saskatchewan, BC and Alberta are expected to have the most acute shortages."

There does not appear to be an organized plan to address labour shortages within the tourism industry in Ottawa.

OBSERVATIONS

Based on the work completed a number of observations have been identified. The observations have been validated by the Steering Committee, Sector Champions and industry stakeholders.

- **Ottawa is starting from a position of strength and is already a viable tourism destination**

There are a number of key tourism attributes that make Ottawa a desirable destination. Ottawa has benefited from increased tourism visitation and revenues over the past 10 years and this growth can be attributed to the attractiveness of the destination as well as efforts designed to stimulate increased travel.

- **Ottawa's tourism leaders and public sector partners have a genuine desire to improve**

It is very apparent that within the destination there is a strong desire to understand and act upon the observations and recommendations revealed through the PrTDF process. Both industry and public sector tourism leaders demonstrated interest in the process and were fully engaged in all aspect of the project.

- **Currently there is no clear vision for destination development, this may be a result of the multiple levels of government found in the capital region**

While there is a demonstrated desire to improve it is clear there is not a vision for destination development. While attempts have been made to better understand what is needed in terms of destination development, the complexity of both public and private sector entities seem to inhibit any progress on a macro level. Development appears to be spearheaded by a variety of interests however that development is not part of any master plan designed to enhance the overall appeal of the destination especially from a tourism perspective. Often times development occurs that is void of a tourism perspective or to the benefit of the visitor.

- **Leadership is evident inside and outside the industry but is not always on the same page**

Leadership exists in the destination but evidence suggests it operates in silos within the destination especially within a tourism context.

- **A unifying approach is required – a “better together” philosophy may be appropriate**

The above observations lead to the conclusion that change must happen if the destination is to grow and succeed from a tourism perspective. Building on the desire to improve and the obvious need for destination development, current leadership must understand and embrace a better together philosophy. Current market conditions have created a need for collaborative and creative thinking. Tourism destinations far and wide have recognized the need to work together better in order to survive and succeed today and over the long-term. This reality must permeate any action taken as a result of Ottawa's PrTDF findings and recommendations.

- **The importance of tourism is not fully recognized or appreciated**

Tourism is big business in Ottawa and while the importance of the sector is understood within pockets of both the public and private sector, the full magnitude of tourism's importance and impact to the destination's well being and to the enhanced lifestyle of those living there goes relatively unnoticed. As a result, broad scale support for tourism initiatives and activities are limited to those at the core of the tourism industry or at minimum those in close proximity to discussions about tourism.

OPPORTUNITIES

Based on the above observations a number of opportunities have been identified consistent with the manner in which the destination has been assessed. The three dimensions of understanding are connected to the destination's product, performance and futurity. Within each category, opportunities exist to take the destination to the next level. Understanding these opportunities and then collectively acting on them will go a long way to enhance the overall appeal and success of Ottawa's tourism offering.

Product Opportunities

- To create new reasons to visit the destination, the collection of national museums have an opportunity to regularly add fresh content such as more world exhibitions, with a focus on tourism need periods
- Significant work has been directed towards a revitalized Lansdowne Park, this is a significant opportunity for the destination; discussions and final outcomes should include a tourism perspective
- Tourism signage / way finding is limited and needs attention and improvement
- Delivery of consistent bilingual services within tourism businesses needs to be improved
- Tourists with "special needs" may experience accessibility problems therefore an opportunity exists to enhance the service currently offered and to extend the availability of those services to all tourism establishments
- Enhanced visitor access and use of water and waterfronts presents an opportunity
- Ottawa International Airport has capacity to attract and service more airline tenants providing increased air access to the destination, therefore the opportunity exists to support efforts made by the airport authority and airport / airline organizations to improve air access to and within Canada with focus directed at Ottawa
- Given the significant resources directed at staging the highly recognized and acclaimed Canada Day celebrations on Parliament Hill, the opportunity exists to extend Canada Day celebrations into a multi-day festival thereby attracting more people and extending the stay of those visitors who experience Canada's birthday in the nation's capital

- Successful destinations have recognized the need to service visitors once they are in the destination, an opportunity exists to significantly improve Visitor Services / Information within Ottawa this is an area that requires immediate attention
- Successful destinations offer visitors a warm welcome, excellent customer service and hospitality and deliver value for money, while the accommodation sector continues to raise the bar in this area the tourism industry at large especially within the destination must improve therefore the opportunity exists to offer region-wide customer service training

Performance Opportunities

- Guest satisfaction levels are not tracked on a destination-wide basis (experience satisfaction and value for money) therefore those within the industry don't know what customers think once they have experienced the tourism offerings within Ottawa, this clearly puts the tourism industry at a disadvantage and eliminates any opportunity to enhance its tourism offering and experiences, an opportunity exists to put in place an annual customer service tracking survey

Futurity Opportunities

- Labour issues exist; increases to minimum wage, conflict with higher government wages make it challenging to attract and keep all levels of hospitality workers, an opportunity exists to better understand current and impending tourism labour issues and put in place strategies to overcome these issues in order for the destination to be successful over the long-term
- While the Outdoor Recreation cluster is a demand generator, emphasis should be directed to develop this asset especially related to cycling and waterfront access
- An opportunity exists to work together better at municipal, provincial and DMO levels therefore the creation of a bi-provincial tourism alliance that collectively focuses on both tourism development and marketing will serve the destination well, in addition greater attention should be given to ensuring the entire region is promoted featuring assets that exist beyond the city core
- While the City of Ottawa is involved in tourism destination development on many levels, the activities of the City may not be widely understood or appreciated, therefore, an opportunity exists for the City to better communicate its activities. That being said, some inside the tourism industry feel more is required from the City and suggest the City supports the delivery of improved visitor services, way finding and signage and tourism awareness initiatives
- There is belief shared by some that the water assets are not being fully utilized and that access could be enhanced by working with the agencies that have jurisdiction in this area
- Relatively speaking, Ontario's investment in Ottawa's tourism destination development is lacking and although the Ministry has supported event development, Ottawa's tourism industry requires increased attention and focus around long-term product and experience development. The opportunity exists for the Ministry to assign senior representatives to partner with Ottawa in ongoing destination development

RECOMMENDATIONS & ACTIONS

Based on the findings the following recommendations have been developed in consultation with the Steering Committee, Sector Champions, industry leaders and tourism stakeholders in Ottawa.

1. Establish a Tourism Leadership Alliance

- Bring together leaders from all levels of government, the NCC, the tourism industry and national institutions to understand and focus on long-term destination development
- Ontario Ministry of Tourism senior staff need to take a lead role in this alliance, as they have done in Toronto and Niagara Region
- Mandate – the alliance will be accountable for implementation of the PRTD recommendations with an *intentional* focus on destination development
- Establish by October 2009

2. Create Ottawa's Long-Term Destination Development Strategy

- There is a need for one vision for destination development
- PRTD recommendations are the basis of the strategy
- Strategies must be in-sync with other agendas within the destination
- A prioritization of the development opportunities is the first order of business
- There is a need to create a framework for implementation
- Seek \$ assistance from the Ministry of Tourism in order to facilitate implementation
- Use funds to retain a local facilitator to manage the process

3. Implement region-wide annual tracking of visitors experience by Fall 2009

4. Increase awareness of the importance of tourism among business leaders, elected officials, government staff, media, influencers, general public

5. Engage leadership of national institutions to assist in attracting world exhibitions annually – *during tourism need periods*

6. Continue to support dialogue around the revitalization of Lansdowne Park – ensure a tourism perspective is considered

7. Create a bi-provincial strategic tourism marketing alliance between OTMPC, Tourisme Quebec, Ottawa Tourism and Tourism Outaouais

8. Identify a long-term strategy to address hospitality labour gaps

9. Visitor Services

- Revitalize Ottawa Info Centre – partnership with NCC, OTMPC, private sector
- Tourism signage/way finding – explore ways to improve signage with the City, NCC, Province

- Upgrade bilingual services – *an audit is needed*
- Enhance delivery of “other” languages – *an audit is needed*
- Understand gaps in servicing visitors with special needs – *an audit is needed*
- Improve airport road access and eliminate traffic congestion, especially at peak travel times
- Deliver region-wide customer service training, establish "*Ottawa’s culture of hospitality excellence*"

10. Focus attention on those tourism assets that offer potential but are underdeveloped or underperforming. The following list of assets represent significant opportunity for the destination if they were to be enhanced, improved or better promoted

- Sparks Street
- Lansdowne Park
- LeBreton Flats
- Outdoor recreation – improve and expand cycling paths, enhance water access
- Culinary Tourism – the Savour Ottawa initiative offers potential
- Ottawa International Airport – increase access by growing airline partners
- Attention given to the development of more family focused attractions
- Canada Day celebrations – extend length of the event

NEXT STEPS

The Premier-ranked Tourist Destination project has provided a clear appraisal of Ottawa's position in the tourism marketplace, its strengths, and opportunities and is a benchmark to measure future performance. With the knowledge of this information having tourism industry "buy-in" and more importantly, proactive industry involvement in future strategic planning and implementation is critical to improvement. The destination is encouraged to communicate the findings and recommendations to all involved in the tourism industry.

With this accomplished, the Tourism Leadership Alliance should establish a process for implementation of the recommendations found in this report. This must be a process to engage the tourism industry in the development plan and process to ensure industry accountability for its delivery.

CONCLUSION

Tourism development 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 these 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 Ottawa'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.

GLOSSARY OF TERMS

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

Core Attraction/Core Attractors: The feature(s), facility (ies), and/or experience which act as the primary motivators for most travel to the destination; the attractions with the most tourist visits in the destination. Core attractions can differ from season to season, as in for example golf vs. skiing at a four seasons resort destination. They can overlap or be distinctly different for differing visitor segments, e.g., cycling at Gatineau Park vs. shopping at the ByWard Market after a day of outdoor recreation; or mass vs. niche segments, e.g., hiking along the Canal vs. joining a guided tour of the National Art Gallery.

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

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

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

Memorable Tourist Experience: A satisfying travel experience that lasts in the guest's memory, typically because he or she was engaged in a deep and lasting (i.e., in an out-of-the-ordinary) manner by their experience of the destination. A high quality tourist experience will be memorable for all the right reasons.

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

On-Theme Activities: Activities (uses made of features or facilities) that are related to the core attraction or the **core experience**. For example, if the core attraction is Outdoor recreation, on-theme activities could be: sailing on Dow's Lake, walking the trails in Gatineau Park or ice skating on the canal.

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

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

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

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

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

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

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

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