



OTTAWA'S PREMIER-RANKED TOURIST DESTINATION PROJECT

EXECUTIVE SUMMARY | September 2009



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WHAT IS THE PREMIER-RANKED TOURIST DESTINATION PROJECT?

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



THE THREE DIMENSIONS OF TOURISM ASSESSMENT

1. The Product Dimension

This dimension looks at the features that enable a destination to provide a high quality tourist experience. This is validated through examining the following:

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

2. The Performance Dimension

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

- Visitation
- Occupancy and Yield
- Critical Acclaim

3. The Futurity Dimension

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

- Destination Marketing
- Product Renewal
- Managing within Carrying Capacities

OTTAWA'S PRTD OBJECTIVES

- Increase visitation and tourism revenues within Canada's Capital Region
- Move Ottawa to the next level as an attractive visitor destination
- Rally the tourism industry and other partners to improve individually and collectively
- Identify and understand current tourism product/experience gaps and opportunities
- Develop recommendations and a process to address gaps and seize opportunities



THE PRTD PROCESS

- Started in January 2009
- A partnership between government and industry
- Ontario Ministry of Tourism
- City of Ottawa
- Ottawa Tourism
- Ottawa's Tourism Industry
- Scope is Canada's Capital Region and its leisure tourism and meeting & convention businesses
- The process was led by an independent consultant (BRAIN TRUST) and accountable to the PRTD Steering Committee through Ottawa Tourism
- The process was supported by tourism Sector Working Groups
- Algonquin College – completed the Destination Audit and secondary research
- Findings and recommendations were validated by the Steering Committee and Sector Working Groups
- The focus of the project is on tourism product and experience development

SUMMARY OF FINDINGS

- Ottawa is starting from a position of strength and is a viable tourism destination
- Tourism leaders and public sector partners have a genuine desire to improve
- 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
- Leadership exists in the destination but evidence suggests it operates in silos
- A unifying approach is required – a “better together” philosophy is appropriate
- The importance of tourism to Ottawa is not fully recognized or appreciated



Product Opportunities

- National museums have an opportunity to add fresh content such as more world exhibitions to create new reasons to visit with a focus on need periods
- Opportunity for a revitalized Lansdowne Park with a tourism perspective considered
- Tourism signage / way finding is limited and needs improvement
- Delivery of bilingual services throughout tourism businesses needs improvement
- Tourists with “special needs” may experience accessibility problems
- Enhanced visitor access and use of water and waterfronts presents an opportunity
- Ottawa Airport has capacity for more airline tenants providing increased access
- Opportunity exists to extend Canada Day celebrations into a multi-day festival
- Provision of Visitor Services / Information is not adequate and requires attention
- Region-wide customer service training is currently not offered

Performance Opportunities

- Guest satisfaction levels are not tracked (experience satisfaction and value for money)

Futurity Opportunities

- Labour issues exist; minimum wage, conflict with government wages make it challenging to attract and keep all levels of hospitality workers
- While the Outdoor Recreation cluster is a demand generator emphasis should be directed to develop this asset especially related to cycling and water access
- Bi-provincial tourism alliance; opportunity exists to work together better at municipal, provincial and DMO levels, focus on both tourism development and marketing
- The City is involved in tourism development, some feel more is required; City could support improved visitor services, 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
- Ontario’s investment in Ottawa’s tourism destination development may be lacking, the industry requires increased attention around long-term product development

RECOMMENDATIONS

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 takes a lead role as done in Toronto, Niagara Region
 - Mandate – the alliance is accountable for implementation of recommendations with an intentional focus on destination development
 - Establish by October 2009
2. Create Ottawa's Long-Term Destination Development Strategy
 - One vision for destination development, PRTD recommendations are the basis of the strategy and a prioritization of the opportunities is the first order of business
 - Strategies must be in-sync with other agendas within the destination
 - 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 Outaouais Tourism
8. Identify a long-term strategy to address hospitality labour gaps
9. Visitor Services
 - Revitalize Ottawa Info Centre – partnership with NCC, OTMPC, private sector
 - Explore ways to improve tourism signage / way finding with 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, eliminate traffic congestion, especially at peak travel times
 - Deliver customer service training, establish “Ottawa's culture of hospitality excellence”
10. Focus attention on tourism assets that offer potential but are underdeveloped or underperforming. The list represents significant opportunity if each were to be enhanced, improved and / 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.