

FIVE-YEAR STRATEGY

OTTAWA TOURISM



OTTAWA
CANADA'S CAPITAL

WITH THIS PLAN, OTTAWA TOURISM WILL REDEFINE ITSELF.

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EXECUTIVE SUMMARY

Michael Crockatt
President & CEO, Ottawa Tourism

On behalf of the team at Ottawa Tourism, I am proud to share our new long-term strategy. We thank our tourism industry stakeholders for their engagement in this process. We are fortunate to live in a community with such a strong understanding of the enormous economic contribution that tourism makes.

Destination Marketing Organizations (DMOs) like Ottawa Tourism need to evolve along with the changing environment of how people get inspired to travel somewhere, how they research and book their travel, and how travellers experience destinations. Ottawa Tourism and our stakeholders have recognized this, and have adopted the new strategy outlined in this document.

We know that successful destinations do a great deal more than promote existing product. Communities fostering a high level of collaboration on tourism projects—where both the public and private sector are committed to prioritizing tourism, and where the sense of place is strong—are consistently also the destinations where people like to travel.

How does this pride of place manifest itself into strong tourism numbers? As you will see in the following pages, the answer lies in recognizing that visitors planning trips increasingly rely on social media influencers and user-generated reviews and hence, coordinating a more active role for Ottawa Tourism in those conversations. Ottawa has 1.3 million local voices who have the power to positively or negatively influence the travel decisions of our potential visitors. For this reason, managing the communication of information, dialogue, pride, and branding throughout local channels is equally important to the marketing and sales work that Ottawa Tourism has long done outside of Ottawa.

Our team invites you to read through the findings and analysis of our strategic planning process, and to seek out ways to work with Ottawa Tourism to further our destination's capacity to attract visitors. We look forward to working with you so that together we can step into the next era of growth and prosperity for Ottawa.

A handwritten signature in black ink, appearing to read 'M Crockatt'.

BACKGROUND

This is an exciting time for Ottawa Tourism. On the verge of being centre stage for Canada's sesquicentennial in 2017, Ottawa has the necessary infrastructure (including the Shaw Centre and the O-Train that continues to expand across the Capital Region) and the destination appeal.

We are well positioned as the nation's capital to offer Canadian experiences that hold international appeal including visiting Parliament Hill and a collection of impressive museums.

In order for Ottawa Tourism to build on the added attention the city will enjoy in 2017 and ensure that this renewed interest is a catalyst for further development within the local tourism industry, now is the time to put a plan in place that sets a vision for the organization and defines a mission and key strategies.

With this plan, Ottawa Tourism is ready to redefine itself. Aligning these factors will enhance the efforts and expertise that Ottawa Tourism has been gathering over the past few years as it tested and implemented new strategies and tactics.

Ottawa Tourism recognizes the value of collaborating with its stakeholders—with the caveat that consumers must come first. Travellers' needs and perceptions cannot be overlooked or discounted. A DMO's mission, strategy and tactics cannot succeed without operating within the context of industry and political concerns. In city marketing, this support should also include municipal departments, where priorities like cultural initiatives and sporting events may overlap.



PROCESS

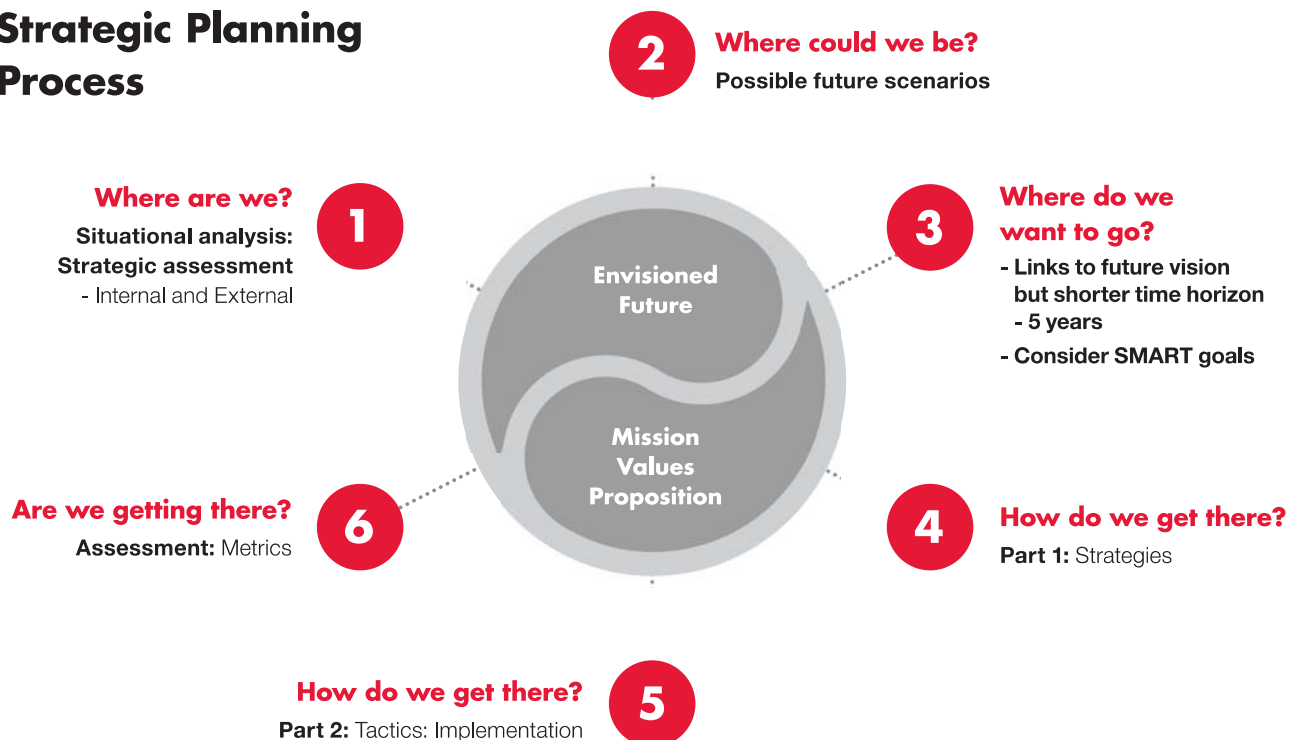
Destination Think! was engaged to develop the strategy for Ottawa Tourism. Destination Think! is a group of international professionals who work with destinations in Canada, Australia, Europe, Asia and the United States.

Destination Think!'s approach followed the Strategic Planning Process model shown below.

This strategy was developed through a collaborative process because success for Ottawa Tourism is dependent on the success of its stakeholders. Input was sought through interviews and strategic workshops from numerous stakeholders from government, industry, neighbouring DMOs and others.

Our five-year strategy is a result of research and analysis, combined with Destination Think!'s domain knowledge and the collective intelligence from the Ottawa Tourism team and its stakeholders. This robust and progressive strategy will grow tourism in the right way, for the benefit of our guests, citizens, industry and government.

Strategic Planning Process



STRATEGIC CONTEXT

The last few decades have seen a seismic shift in consumer behaviour. The explosion of information on the internet, combined with the proliferation of social media and data, has disrupted the traditional strategies used in tourism marketing.

Previously, information was in limited supply and managed by a few. Now, information is everywhere, created by everyone, and sold by many.

Word-of-mouth has always been the most important influencer of consumer behaviour in travel, but it used to be shared out of earshot of destination marketing organizations. In 2017, social media not only makes these comments publicly accessible, it increases their importance. Managing the stories people tell each other is now the most effective form of marketing and branding a destination can engage in.

What this means is that destination marketers now need to shift their focus away from pure promotion and instead focus on products and experiences. Quality experiences lead to positive stories; and shareable moments encourage travellers to tell those stories to their friends.

The destinations with the highest-quality experiences overall, including memorable and sharable moments combined with digital marketing sophistication, will win.

A comprehensive study conducted by Destination Marketing Association International (DMAI), found three transformational opportunities for DMOs:

- 1 Making a shift toward bi-directional conversations with both leisure visitors and meeting planners, rather than broadcasting information and offers;
- 2 Creating and delivering a uniquely compelling brand essence that manifests at each visitor engagement point and is embraced by the community, and;
- 3 Exploring alternative business models to ensure the sustainability of DMOs and long-term support for the local tourism industry.

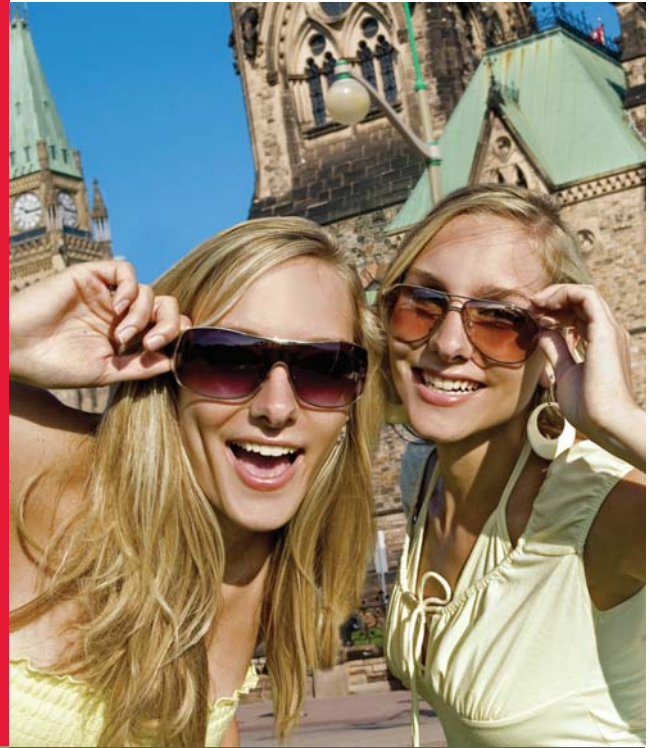
In order to effectively lead and grow the tourism economy in the right way, a new approach to destination marketing is required. DMOs all around the world are redefining themselves, and only these leading DMOs will gain a competitive advantage for their industry and destination overall.

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MISSION

OTTAWA TOURISM LEADS AND GROWS TOURISM TO THE BENEFIT OF THE LOCAL ECONOMY AND ALL CITIZENS. OTTAWA TOURISM PROMOTES THE DESTINATION BY DELIVERING THE RIGHT MESSAGES TO THE RIGHT PEOPLE AT THE RIGHT TIME, AND DEVELOPS THE DESTINATION IN COLLABORATION WITH ITS STAKEHOLDERS TO DELIVER A WORLD-CLASS EXPERIENCE FOR VISITORS.

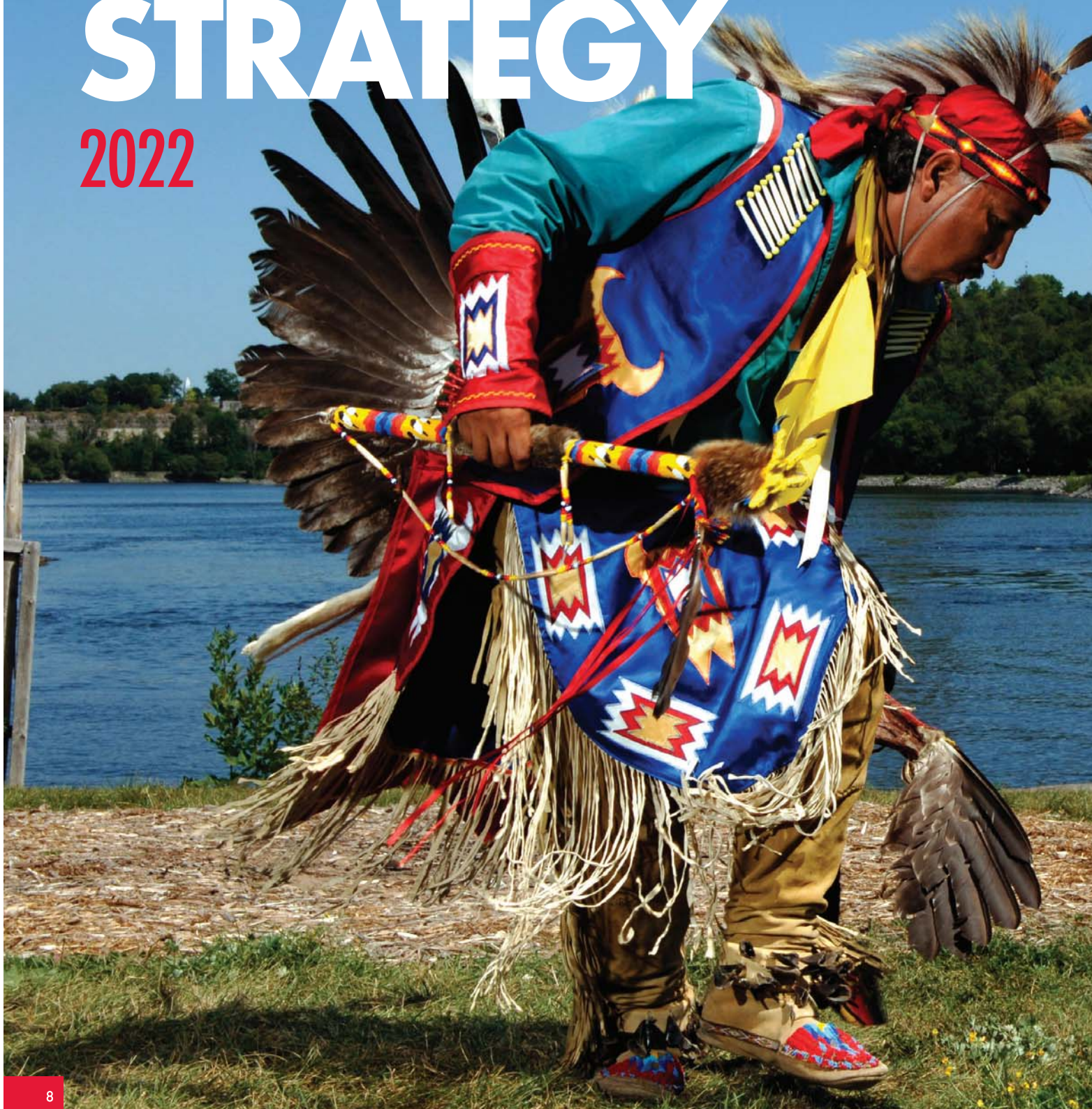


VISION

OTTAWA OFFERS THE COMPLETE CAPITAL EXPERIENCE, TELLS THE STORY OF CANADA, AND GETS PEOPLE TALKING.

OTTAWA STRATEGY

2022





IT IS OTTAWA TOURISM'S AMBITION TO BECOME THE BEST DMO IN CANADA. WE HAVE AN ENVIRONMENT WHERE THIS VISION CAN BE MET. IN THE FUTURE, 2017 WILL BE SEEN AS THE START OF A NEW ERA OF GROWTH FOR OTTAWA'S TOURISM INDUSTRY AND RESULTING BENEFITS FOR ITS RESIDENTS. THE FOLLOWING STRATEGIES AND ACTIONS WILL ENABLE US TO ACHIEVE OUR AMBITION.



OTTAWA IS **A COMPLETE EXPERIENCE**



Ottawa Delivers Top Niche Experiences in Canada

In 2022, Ottawa tells the story of Canada through a differentiated product mix with high-quality experiences. Ottawa is a dynamic and remarkable tourism destination, known for a high level of service.



Ottawa tells the story of Canada. As the nation's capital, we represent all peoples, cultures and experiences. This provides the opportunity to create storylines based on the remarkable experiences that create memories our guests will treasure and share with others. We will develop what we promote and promote what we develop.

Actions

- 1** We will conduct research to identify the right storylines and create group clusters of products and experiences for niche audiences to tell these stories.
- 2** We will uncover our place DNA to infuse it into our experiences and create a unique experience that is impossible for others to copy.
- 3** We will expand our focus in the development of the destination experience.
- 4** We will lead or support all stakeholders to create memorable experiences that align with the key storylines to deliver the complete capital experience.
- 5** We will put in place research to measure the quality of the visitor experience on an ongoing basis and identify key pain points in the customer journey.



OTTAWA HAS **A GREAT REPUTATION**



Ottawa is recognized as the best all-Canadian city for visitors

In 2022, Ottawa is recognized as a top Canadian destination. Every Canadian is proud of their capital and needs to visit at least once. Ottawa has raised its international reputation and benchmarked it with other G7 capital cities. Our visitors and residents want to share their Ottawa story. Ottawa is the cultural gateway to Canada.



A remarkable destination experience leads to a great reputation. In an economy that is fuelled by word-of-mouth, reputation is created by a plethora of storytellers. Managing these stories requires delivering experiences that turn influencers, visitors, residents and others into advocates. We want Canadians to be proud of their capital and visitors to view Ottawa as the city that embodies Canada.

Actions

- 1** We will develop an additional set of marketing metrics to measure the passion and sentiment of (potential) visitor engagements online, relevant to the destination.
- 2** We will set up a social media listening strategy and build up business intelligence by placing online analytics at the heart of all our daily marketing activities.
- 3** We will correlate measurements to monetary value to provide an indication of the potential economic revenue and/or the PR value of our marketing actions.



OTTAWA IS **THE PLACE TO VISIT**



Ottawa leads domestic market share growth



Ottawa has increased its international market share by 10%

In 2022, Ottawa has increased the number of visitors and has grown its domestic and international market share. Ottawa sees an increase in average expenditure.



Our promotional activity will build upon a foundation of our remarkable experiences and our great reputation. We will focus our investment on the important touch points in the consumer path-to-purchase for our niche audiences through targeted promotions. We will tell the story of Canada, through an Ottawa lens.

Actions

- 1** We will integrate increasing amounts of niche-based content marketing into our strategies as we balance our promotional activities away from solely mass-media broadcasting.
- 2** We will enable and encourage others to share stories about Ottawa's experiences in order to generate positive word-of-mouth and online advocacy.
- 3** We will invest in integrated marketing technology including a new CRM and social media listening and management tools. We will create new team roles in order to ensure just-in-time messaging is possible.
- 4** We will invest in research to learn about niche audiences and the passions our destination can claim. Niche segmentation will lead when communicating stories, supported by demographic segmentation.



OTTAWA IS **THE PLACE TO MEET**



Ottawa is a top national destination for Canadian and international associations and hosts 44 major meetings per year (500+ delegates) by 2022



Ottawa hosts 26 major events per year by 2022

In 2022, Ottawa hosts more international and Canadian meetings than ever before. Ottawa continues to embrace the Bid More, Win More, Host More strategy and outperforms its competitive set.



Now is the right time to integrate the meetings and events business unit into our overall marketing strategy. This does not require a completely unique strategy. Most aspects of the marketing strategy can support and reinforce sales efforts.

Actions

- 1** We will continue to prioritize meetings and events as key drivers of tourism.
- 2** We will integrate meetings and conventions into the overall marketing strategy and treat this industry like a unique niche audience.
- 3** We will build a strong coalition of partners with a common goal: one team, one dream.
- 4** We will continue to focus on attracting meetings from national associations while also looking for opportunities beyond this core segment of meetings business.



OTTAWA HAS **THE BEST DMO**



Ottawa Tourism becomes the model DMO in Canada

In 2022, Ottawa Tourism is an employer of choice and is the city's leader for tourism. Ottawa Tourism is an indispensable and natural partner for the city in everything that concerns branding and storytelling. Ottawa Tourism leads the creation and communication of the optimal visitor experience for the destination.



A bold new strategy requires a stable organization with a team striving for excellence and strong partners. Our team and partners are ready for the challenge.

Actions

- 1** We will seek to create a stable and growing source of funding.
- 2** We will develop a phased approach to find new ways to create value for our members.
- 3** We will develop an organizational transition plan to support the new strategy. This will include filling capacity and capability gaps, while fostering a new organizational culture.
- 4** We will review the way our marketing is executed, and how our core strategic decisions are made.

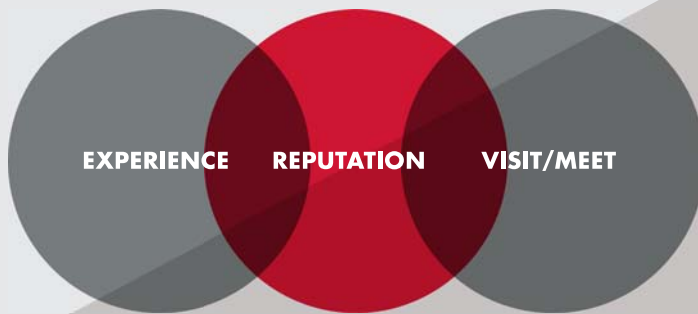
CONCLUSION

Implementing the strategy will require a five-year process supported by both the Ottawa Tourism team and our partners. It is imperative that all stakeholders understand Ottawa Tourism's direction, and remain involved as the details for each strategy are planned and then transitioned into tactics.

By embracing the strategic recommendations outlined in this document, Ottawa Tourism will take destination marketing innovation to a level that is presently not seen at any other DMO.

OTTAWA IS THE BEST DMO

ROLE OF OTTAWA PARTNERS



ROLE OF OTTAWA TOURISM

OTTAWA
CANADA'S CAPITAL

