TOURISM BRAMPTON.



City of Brampton

Premier-ranked Tourist Destination Project

September 2009



The Framework

TOURISM Brampton

www.tourismbrampton.ca

BRAMPTON Flower City
brampton.ca

Thank you to the tourism operators and stakeholders who volunteered their time and expertise on this project. Their contribution was invaluable to the success of this project.

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Ontario

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WHAT IS THE PREMIER-RANKED TOURIST DESTINATION FRAMEWORK?

In 2001, the Premier-ranked Tourist Destination Framework was developed by the Ontario Ministry of Tourism. It was designed as a tool for destinations to inventory and analyze themselves in the tourism marketplace.

The Premier-ranked workbook is a tool to measure the market status of the destination. It is a manual for working through a framework that:

- Captures the attributes / factors / conditions considered necessary for a destination to be perceived as Premier-ranked
- Identifies strengths and opportunities that might be used to create a sustainable competitive advantage
- Provides a focus for building an expanded network of tourism stakeholders and consensus on future priorities for action.

Brampton implemented the Premier-ranked Tourist Destination Framework in order to secure a solid foundation for the development of their tourism strategy. The added benefit of implementing a research study of this size is the engagement of tourism stakeholders in the process.

A Premier-ranked Tourist Destination has attributes with well above average performance justified through dimensions that capture the quality of the experience, destination attractiveness and market success.

The process is intended for use by destination areas rather than individual operators. Destinations of any size and status will benefit from the project outcomes.

A destination is measured by three essential dimensions and 11 elements, as follows:

PRODUCT	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.

PERFORMANCE	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,

FUTURITY	And sustained by: I. Destination marketing; J. Product Renewal' and K. Managing within Carrying Capacities

The workbook guides a destination through three stages including evaluation, interpretation and planning. The evaluation process begins with implementing the Resource Audit. Detailed surveys are distributed to tourism operators in all segments (accommodations, attractions, festivals & events, retail, dining, recreation, etc.). Resource Audit responses together with destination reports and studies are used to evaluate the product, performance and futurity of the destination. The destination's status is measured by assigning a yes, partial or no response to numerous criteria. These measurements then lend themselves to determining the next steps in tourism development based on the destination's opportunities and gaps.

The 11th largest city in Canada, Brampton has a successful, well-diversified economy and is home to more than 8,000 businesses. The City continues to retain a Triple 'A' credit rating by Standard & Poor for the third consecutive year, reflecting its debt-free position, exceptional liquidity levels and excellent economy. The City's 2009 operating budget is $400.8 million and approved funding for its overall capital program stands at $700 million.

Brampton celebrates its diverse population that represents people from more than 175 distinct ethnic backgrounds who speak over 70 different languages. Offering more than 6,000 acres of parkland, Brampton takes pride in being the Flower City of Canada and won the 2008 International Communities in Bloom competition. It is also the first city in the GTA and one of only 10 in North America to have been designated as an International Safe Community by the World Health Organization.

The vision of Tourism Brampton is to generate greater economic impact from targeted tourism segments with a mission to focus on markets of opportunity which relate to Brampton's value proposition. In partnership with local business associations, City departments, senior levels of government, dining establishments and hoteliers, Tourism Brampton promotes the City's tourism destinations, such as the historic downtown; floral and building heritage; arts, culture and entertainment venues; parks, forests, sports activities, beaches and pathway systems; and environmental/agricultural areas.

In Fall 2008, a funding application was submitted to the Ministry of Tourism Investment and Development Office to complete the Ontario Ministry of Tourism Premier-ranked Tourist Destinations Framework. Implementing the Premier-ranked Tourist Destination Project provides:

- a solid foundation for the development of a tourism strategy
- an understanding of what Brampton's product offerings are
- a consensus among industry and municipal stakeholders on goals, priorities and actions
- the background required to attract investment
- a benchmark to allow the measurement of Brampton's performance

Timelines
September 2008
Application submitted to the Ministry of Tourism Investment and Development Office for $20,000 in funding to complete the Framework.
February 2009
The Ministry of Tourism approved the City's funding application for the full amount.
April 2009
Consultant is hired and evaluation and measuring the destination are completed.
May 2009
Stakeholder meeting is held May 28th and survey results are interpreted and presented.
June 2009
Tourism Operators planning meeting is held June 16th. Presentation to Business Development and Marketing Team takes place June 22nd. Project Findings & Recommendations Report is completed

	June 26th.
July – August 2009	
	Using the project findings and recommendations report, a Strategic Plan for Tourism is developed.
September 2009	
	Strategic Plan is presented to Business Development and Marketing Committee for approval.
October 2009	
	Strategic Plan is presented to Council for approval. Once approved strategy is launched to Tourism Industry and stakeholders.

Resource audit statistics

79 businesses were contacted – 68 received email links to the on-line surveys while 11 businesses were contacted by phone because email addresses were not available.

Main Surveys – 60% response rate
Sector Surveys – 69% response rate (where industry was too busy to complete survey, they were asked to log-in and complete the sector survey which was much shorter than the main survey.)

Other means of collecting info to be included:

- Phone calls
- Website searches (reports) – tourism operators, Brampton & Peel
- Other websites – i.e. competitive destinations
- Ministry statistics (Peel Region)

COMMUNITY PROFILE

Population in 2006	433,806
Population in 2001	325,428
2001 to 2006 population change (%)	33.3
Total private dwellings	130,803
Private dwellings occupied by usual residents	125,934
Population density per square kilometre	1626.5
Land area (square km)	266.7051

Source: Statistics Canada, 2006 Census of Population

TOURISM PROFILE

In 2007, 3,255,000 visitors spent $451,678,000, generating $17,065,000 in tax revenues (municipal), $169,000,000 in labour income and 4,851 jobs in Peel Region. There were 2,074,000 same day visits versus 1,181,000 overnight visitors in 2007.

Origin

85% or 2,756,000 from Ontario
1.2% or 38,000 from other Canada
9% or 301,000 from US

5% or 160,000 from overseas

Top 10 Places of Origin:
Metropolitan Toronto (65%), York Region (13%), Durham Region (11%), Simcoe County (7%), Hamilton-Wentworth Region (6.5%), Waterloo Region (6%), Halton Region (6%), Wellington County 5%), Peel Region (3%), Niagara Region (3%)

Travel party

Average party size – 1.4, 75% adult only parties, average age of travelers is 42 years

Purpose of Trip

24% Pleasure, 62% Visiting Friends & Relatives, 10% Business

Seasonality

Q1 - 20.2% or 658,000 visits
Q2 – 25.8% or 839,000 visits
Q3 – 25% or 816,000 visits
Q4 - 28.9% or 942,000 visits

Source: www.tourism.gov.on.ca, Regional Profile

Element A: Distinctive Core and Supporting Attractions

Distinctive Core Attractions criteria and measures assess:

- What it is about the destination that makes it stand out as distinctive in the marketplace
- How the destination's attractions are distinguished
- How the destination offering is relevant to the market wants.

A1. The destination offers distinctive core attractions which are linked to its physical setting and / or history.

Measure	Rating
i. A Resource Audit has been completed	●
ii. The Audit distinguishes between core and supporting attractions	○

Core Attractions	Market	No. of Visits	Attract / Appeal Factor	Physical Link	Historical Link
Local Corporations / Business Facilities (Business Travel)	Overnight Visits	319,000 (10% of total, 11% of overnight)	SI	●	○
Sports Facilities (Tournaments)	Overnight Visits	147,000 (4.5% of total, 5.8% of overnight)	SI	○	○
Local Residents	Day & Overnight Visits	2,023,000 (62% of total, 66% of overnight)	M	●	●

● - Yes, ○ - No, SI – Special Interest, M - Mass

The following factors were considered:

- Number of annual visitors
- Ability to attract and appeal to (pull) visitors from outside local area
- Link to physical setting or landscape
- Link to history of destination
- Critical acclaim

iii. The core attractions motivate a tourist to travel to the destination They do so: ☑ on their own ☐ as part of a regional complex	◗
iv. Opportunities to build on complementary tourism attractions / activities have been assessed.	○
v. The core attractions are linked to the physical setting of the destination	◗
Brampton is located in the GTA, next door to Canada's largest international airport.	
vi. The core attractions are linked to the history of the destination	○
Brampton's Flower City heritage isn't currently linked to the core attractions.	
vii. Other Ontario destinations with competitive or similar offerings have been identified	●

London	170 km	Kingston	340 km	Hamilton	70 km

It will be important to investigate and promote the amenities that make Brampton stand out as distinct in these markets.

viii. The destination is considered to stand out as distinct from its competition	○
Brampton lacks an iconic natural feature to serve as a core attraction with mass market appeal. Its offerings are similar to other destinations located within the GTA. There is opportunity to utilize the city's history to brand experiences related to the Flower City. – examples: garden competitions; garden displays (at homes, local businesses and parks) incorporating heritage roses and other plants that were produced in Brampton (ensure story is told); large, branded flower-pot displays, flower festivals.	
ix. The destination's offering is superior because it offers a better guest experience	**Unknown**
Based on limited data available, it cannot be established that Brampton offers a better guest experience however, customer satisfaction is monitored by 19 businesses that responded to the resource audit. 15 responded that they do not track (34 total responses).	
x. The destination has a product positioning statement	◗
Product position: City is branded as Canada's Flower City. From a tourism prospective, this brand is not currently connected to existing tourism products. There is a need to develop more on-theme activities (restaurants serving 'edible flowers' as part of menu choices, horticulture courses) and supporting attractions (garden tours and festivals).	

A2. Attractions are relevant to the expectations of the identified market segments.

Measure	Rating
i. The resource Audit classifies destination resources and their appeal to Regional, Provincial, National, U.S. and International geographic market segments.	◗
The Resource Audit identified that while some attractions indicated that they appeal to guests from beyond Ontario borders, the majority of their attendance is generated within Ontario. In addition, it cannot be said that these attractions are the main reason or 'pull' for visitation outside Ontario. In 2007, of the total overnight visitation to Peel; 38,000 or 1.2% were from other provinces, 301,000 or 9.2% were from the U.S., 160,000 or 4.9% were from overseas markets and 2,756,000 or 85% were from Ontario. 25 Brampton tourism operators indicated that at least 20% of visitors come from outside Brampton.	
ii. Core attractions are relevant to a tourist market base. This base is considered to be: ☑ Mass market ☑Niche (Special Interest) market	●
Core attractions are relevant to both mass and niche / special interest markets. Mass appeal is evident by the number of friends and relatives that visit the area on an annual basis, while special interest markets are represented by business travelers and sports enthusiasts. These markets generate the following number of trips in Ontario in 2007.	

Market	Number of Trips
Business Travel	7,216
Sports Travel	3,267
VFR	43,377

iii. Attractions appeal to guests from beyond Ontario's borders	○
Powerade Centre (sports venue)	
iv. The market segments for whom the identified attractions are expected to have a compelling appeal have been identified	●
Sports Tourism	
v. A core attraction or set of complimentary attractions pull visitation on a year-round basis	●
The Powerade Centre is a year-round venue for multiple sports including hockey and lacrosse.	

Element B: Quality and Critical Mass

The Quality and Critical Mass element measures the extent to which a destination provides a memorable experience by offering a broad and deep range of options for engaging:

- Core and related experiences
- Entertainment, shopping and dining

B1. The destination offers a range of memorable and experience creating core and on-theme activities sufficient to sustain interest for more than 24 hours.

Measure	Rating
i. The core destination experience stands out as memorable to the visitor	**Unknown**
At this time, Brampton Tourism has not implemented guest satisfaction surveys and therefore there is no evidence that guests experience a memorable stay while visiting Brampton. Individual operator surveys focus mainly on customer service at their individual locations.	
ii. The core experience is typically consumed over a period greater than 24 hours	◗
Statistics Canada CTS and ITS indicate that only 36% of visitors to Peel Region stay overnight. Strategies need to be developed to enhance awareness of tourism products among both visitors and local stakeholders in order to encourage longer stays.	
iii. A variety of on-theme activities are available to give guests a reason to stay overnight	○

Less than 1 hour	Sunny Acre Farm, Brampton Sports Hall of Fame
1 – 2 hours	Inspirational Music in the Park, Brampton Art Fair, Peel Choral Society, Formula Kartways, Powerade Centre, Great War Flying Museum, Brampton Musical Theatre, Beaux-Arts, Orchalaw Orchards, Historic Bovaird House, Peel Heritage Complex, Farm Market
2 – 3 hours	New Year's Eve Celebration, Rose Theatre,
3 - 5 hours	Carabram, Jerk Food Festival, Winterlights & Communities in Bloom

iv. The average length of stay at the destination is greater than 24 hours	○
The average length of overnight stay in Peel Region is 3.7 days. Ontario visitors stay an average of 2 days, Other Canadians stay 5.4 days, US visitors stay 3.1 days and overseas visitors stay 14.1 days.	

B2. The destination offers a range of memorable experience-creating, core and on-theme activities sufficient to sustain tourist interest on a year-round basis.

Measure	Rating
i. The destination offers a range of memorable, experience-creating, core and on-theme activities sufficient to sustain tourist interest on a year-round basis	◗

Core Activity	Season	Price Range
Business Traveller	Year-round	
Sporting Event	Year-round	
Cultural Activities & Performances	Year-round	Free - $120.00

Measure	Rating
ii. The destination offers on-theme activities on a year-round basis	◗

Supporting Activity	Season	Price Range
Shopping	Year-round	Discount to Medium/High-end
Farm Markets / Farmers Markets	Spring – Fall	
Outdoor Recreation Facilities	Year-round	Free - $21.00

Respondents of the Resource Audit indicated that a limited number of attractions are open on a year-round basis. Supporting attractions like shopping are available year round. On-theme activites derive their attractiveness from their physical or logical relationship to the core attractions. There is room for expansion of on-themed activities to encourage increased overnight stays.

B3. Core activities are easily accessible to a variety of market segments at a variety of price points and layers of added value

Measure	**Rating**
i. Core and on-theme activities are easy to buy	○
All activities can be purchased on site. Although many activities are advertised on the internet, in newspaper, flyers, brochures and in some cases by direct mail and radio, a very limited attractions indicated that tickets could be purchased at central locations and points distant from the destination.	
ii. There is a range of options and price points available for a variety of segments to engage in core or on-theme activities	◗
More education on methods to promote and opportunities to work with local media is required (as discussed at industry consultation in June 2009). This would not only make products easier to buy but also provide better customer service and encourage longer length of stay.	

B4.The destination offers a variety of activities attractive to a variety of market segments at a range of price points and layers of added value. The range extends from most basic to multiple layers, including opportunities for relaxation, entertainment, learning and skill development, adventure and new experiences.

Measure	**Rating**
i. The destination offers a variety of activities attractive to a variety of market segments at a range of price points and layers of added value. The range extends from the most basic to multiple layers, including opportunities for relaxation, entertainment, learning, skill development, adventure and new experiences	◗

Experience	Activity	Price Range
Relaxation	Sailing / Canoeing / Kayaking	
	Shopping	
	Festivals & Events	Free - $10
Entertainment	Music in the Park	Free
	Theatre	$20 - $120
	Concerts	$15+
	Racing	$20 - $85
Interpretation	Outdoor Exploring	Free
Education	Museum / Gallery Tours	Free / Donations - $5.00

Cultural / Historic Understanding	Museum / Gallery Tours	Free / Donation - $5.00
	Events	Free - $10
Skill Development	Golf	$25 - $175

23 responses to activity type – 2 (9%) relax, 7 (30%) cultural understanding, 12 (52%) entertainment, 3 (13%) education.

ii. This range of activities is well promoted to and understood by guests	○
iii. This range of activities is easy to buy	○
iv. Groups have cooperatively invested in programming or animating public spaces, gatherings and queuing areas	○

Investment in programming and / or animating public spaces, gathering and queuing areas has been discussed in conjunction with the 'Flower City' Branding initiatives and by the Downtown Development Corporation.

B5. The destination offers cultural experience and entertainment options from basic to venues / shows / events credible at regional to larger scales, or over a range of price points.

Measure	Rating
i. The destination offers a range of cultural experience and entertainment options	◗

Activity	Approximate Price Range
Music in the Park	Free / Donation
Musical concerts	$15+
Theatre Performances	$20 - $120
Walking Tours	Free
Museums	Free / Donation - $10
Gallery Exhibits	Donation
Festivals & Events	Free - $10

ii. Events or venues in the last two years included performances by artists with name recognition beyond the local region	●

Artist	Event / Venue
Natalie Cole	Rose Theatre
Gerry Dee	Rose Theatre
Jan Arden	Rose Theatre
Chantal Kreviatz	Rose Theatre
Russell Peters	Rose Theatre
Kevin Bacon	Rose Theatre
Burton Cummings	Canada Day at Chinguacousy Park 2008
Amanda Marshall	Canada Day at Chinguacousy Park 2009
Our Lady Peace	New Years Eve
David Usher	New Years Eve
Arkells	New Years Eve
Russell Peters	Powerade Centre

B6. The destination offers a broad range of dining options.

Measure	Rating
i. The destination offers a range of dining options at a range of price points	◗

Restaurant	average entre price range

Vesuvios Ristorante	$20.00
Aggie Martin	$24.00
Nexus Exceptional Dining & Piano Bar	$25.00

ii. A number of restaurants have wine lists with more than 25 wine labels	◗

Restaurant	# wine labels	# beer labels
Tracks Brew Pub	12	45
Vesuvios Ristorante	65	5
Aggie Martin	35	15
Nexus Exceptional Dining & Piano Bar	16	6

iii. A number of restaurants have trained and accredited chefs	◗

Restaurant	Accreditation
Vesuvios Ristorante	Chef du Cuisine
Nexus Exceptional Dining & Piano Bar	Red Seal

iv. A number of restaurants / chefs have name recognition beyond the local region	○

B7. The destination offers a broad range of shopping options.

Measure	Rating
i. The destination offers a range of retail shopping opportunities including clothing, crafts and memorabilia at a range of price points.	◗

Store	Quality of Merch (low,med,high)
Bramalea City Centre	Various
Shoppers World Brampton	Various
Queen Street Corridor	Low - Medium
Farmer’s Market	Various
Farm Market Stores	Low - Medium

ii. Stores or galleries in the destination area have name recognition beyond the local region	◗

Bramalea City Centre	A number of national brand stores
Shoppers World Brampton	A number of national brand stores

Element C: Satisfaction and Value

The Satisfaction and Value criteria measures and documents the extent to which the destination offers guests:

- A welcome
- Satisfied expectations
- Value for money
- What the destination is doing to enhance its performance in these areas

C1. Guests feel welcomed into a community that is happy to host, serve or engage them.

Measure	Rating
i. The destination is considered "friendly" or "very hospitable" by guests and by travel agents and tour operators packaging experiences at the destination	**Unknown**
Due to the limited customer satisfaction information available throughout the city, it cannot be verified that most guests were very satisfied in their destination experience. The Resource Audit revealed limited satisfaction data collected for the destination stay in general, rather that most businesses are obtaining information for their own experience provisions	

C2. The destination offers a highly satisfied experience to its guests.

Measure	Rating
i. The destination carries out regular surveys which track guest satisfaction and their perceptions of value and hospitality	○
There is currently not a survey that collects general visitation information. For example, the City of Brampton / Brampton tourism is not coordinating any visitor surveys.	
ii. The most recent survey indicated that most guests were very satisfied with their destination experience.	**Unknown**

C3. The destination is perceived as offering value for money spent.

Measure	Rating
i. The destination is considered "good value" or "expensive but worth every cent" by guests, travel agents and tour operators packaging experiences at the destination	**Unknown**
No data collected to answer this question.	
ii. Key experience and service prices are monitored and are staying constant or trending up	●
The Resource Audit revealed that key experiences, service prices and visitation are staying the same or increasing.	

Free Admission	17.5%
Stayed the same	40%
Increased	42.5%
Decreased	0

iii. Visitation is trending upwards.	●
Visitation is on an upward trend. The significant population growth and business attraction appear to be reasons for this. Visitation is trending upwards according to visitation statistics from CTS / ITS. Visitation increased from 2,973,000 in 2006 to 3,255,000 in 2007.	

Element D: Accessibility

The Accessibility criteria and measures assess:

- The ease of getting to the destination
- The transportation modes that serve it
- For waterfront communities, "friendliness" to cruise ships or boat passengers
- The recognition given to the importance of transportation to the tourist experience

D1. The destination is within 2-3 hours drive from a major population centre or international gateway, or a lesser drive time from a regional gateway.

Measure	Rating
i. The travel time to the nearest major urban market is less than 2 hours	●
The City of Brampton is located within a major urban market with a travel time to downtown Toronto of 30 minutes.	
ii. The population within a 3 hour drive time is substantial	●
The population within a 3 hour radius is over 5 million people.	
iii. Drive time from the nearest U.S. border crossing or international airport is less than 2 hours	●
The nearest airport is located in neighbouring Mississauga, approximately 30 minutes away. The nearest border crossing is located 125 km away and connects Ontario to New York State. Alternatively, the border crossing to Michigan is located 270 km to the west.	
iv. Flight time from the international to the nearest regional airport is less than 1 hour	**Not Applicable**
v. Drive time from that regional airport is less than 1 hour	**Not Applicable**

D2. Travel from the nearest urban centre or gateway is not unpleasant, and is achievable with minimum effort and discomfort.

Measure	Rating
i. Travel from the nearest urban centre or gateway is not unpleasant, and is achievable with minimum effort and discomfort	●
ii. A direct connection to the destination is conveniently available, or travel by private car is over a route generally accepted as direct and well marked	●
Brampton is at the centre of an extensive network of highways, including the 401, 410, 427, 403, and 407 ETR, that provide easy access both east and west, and north and south through the city. As a result, the city thrives on the fast, efficient movement of goods and services. When roads are not the most ideal form of transportation, Brampton still delivers. Brampton Transit provides accessible and affordable citywide service for work, play, or travel, while regular GO Train and GO Bus passenger links between Brampton and Toronto's Union Station make the commute to the GTA's core a relatively stress-free one. For the North American traveler, VIA Rail Transport operates seven days a week, providing service to Toronto, Sarnia, Chicago, and intermediate points along the way.	

D3. The destination is accessible by alternative travel modes and price options.

Measure	Rating
i. Alternative modes of travel from the urban centre / gateway are available	●
Alternative modes of travel within the urban centre include: ☑ Private Car ☑ Shuttle bus operated by service provider ☑ Regularly scheduled public bus service ☑ Train ☐ Regularly scheduled ferry service ☐ Private boat ☐ Private Plane ☑ Other: GO Transit, VIA, Grayhound, etc.	
ii. If located on water, the destination is accessible to cruise ships	**Not Applicable**
iii. If located on water, the destination offers slips to transient boaters	**Not Applicable**
iv. If located on water, the destination's cruise ship and / or transient marina slip dockage are located in or close to downtown or the attraction, with attractive and comfortable spaces between them	**Not Applicable**

D4. The destination is investing in making access to it and its attractions attractive and visitor friendly.

Measure	Rating
i. The transportation checklist has been completed	●
ii. A minimum of 9 YES's have been recorded	○

Transportation Resources Checklist

	ATTRIBUTE	YES	NO
1.	a. The destination has at least one easily accessed visitor information centre,	☑	☐
	b. on a major transportation route,	☐	☑
	c. with clear and frequent directional signage	☐	☑
2.	Major tourist transportation routes to downtown(s) have a. frequent directional signage	In development	
	b. well-maintained road surfaces	☑	☐
	c. and attractively maintained public spaces	☑	☐
3.	Transportation routes to major attractions have a. frequent directional signage,	In development	
	b. well-maintained road surfaces,	☑	☐
	c. and attractively maintained public spaces.	☑	☐
4.	Shuttle services or taxis <u>and</u> tourist orientation information are available at transportation terminals.	☐	☑
5.	Tourist traffic congestion and way-finding problems are addressed by transit-based interventions, e.g. municipal transit, shuttle services, People Movers, satellite parking	☑	☐
6.	Transit services to core attractions have schedules that accord with attractions' hours of operation.	☑	☐
7.	a. Taxi drivers have been given service delivery training,	☐	☑
	b. and briefings on tourist attraction locations.	☐	☑

8. All attractions serving the coach tour market have sufficient on-site bus-parking, or there is convenient access to a bus parking / staging area.	☑	☐

Element E: Accommodations Base

The Accommodations Base criteria and measures assess the breadth and depth of the destination's offerings in terms of:

- The range of accommodation classes available
- The range of locations available
- The presence of higher end operators

E1. The destination offers accommodations across a range of types and variety of quality levels and price points.

Measure			**Rating**
i. The destination offers rooms at a variety of quality levels and price points.			◗
Class	# of properties	# of Rooms	Price Range (per night)
Campground	1	246	$28.50 - $44
Bed & Breakfast	1	2	$90
Lodge	0		
Resort Lodge / Hotel	0		
Motel – Independent	1	29	$76
Motel – Chain	1	122	$60 - $70
Hotel – Independent	0		
Hotel – Chain	8	945	$69 - $155
Other	1	177	$69 - $85
ii. There is a range of choices in locations relative to attraction venues and a range of price points			●
There are a number of attractions including; shopping, the downtown area, restaurants, open space in close proximity to hotels.			
iii. This inventory includes representation by branded and widely known and respected higher end operators			◗
Hotel brands represented in the destination include: Holiday Inn, Fairfield Inn & Suites by Marriott, Best Western, Comfort Inn, Howard Johnsons, and Courtyard by Marriott.			

Element F: Visitation

The visitation criteria and measures assess the destination's market performance in terms of:

- It's visitation numbers and market shares
- It's attractiveness to different market segments
- Its attractiveness over the four seasons of the year

F1. The destination draws a significant share of Ontario's total travel to attractions of its type.

Measure	**Rating**
i. The destination attracts a significant number of guests	○
In the year 2007, Peel Region attracted 3,255,000 guests, 2,074,000 on day visits, 1,181,000 staying overnight.	
ii. The destination attracts a significant share of total VFR/Pleasure motivated travel by residents of Ontario	○
In the year 2007, destination visitation captured 3.4% of the total 73,487,000 VFR/Pleasure motivated trips taken by Ontario residents. Its share of those day trips was 3.9%; its share of overnight visits was 2.6%.	
iii. The destination attracts a significant portion of its visits from markets beyond Ontario's borders	○
In the year 2007, overnight guests from the origin markets identified below accounted for the following proportions of the destination's overnight visitation:	
Overnight visits	
35,000 or 3% from other provinces	
242,000 or 21% from the U.S.	
134,000 or 11% from other international markets	
770,000 or 65% from Ontario	
iv. The destination's share of visits by all visitors (day and overnight) to the province from markets beyond Ontario's borders is significant	○
In the year 2007, day visitors from the following origin markets identified below accounted for the following proportions of the destination's same day visit:	
Day Visitors	
3,000 or <1% from other provinces	
59,000 or 2.8% from the U.S.	
26,000 or 1.3% from other international markets	
1,986,000 or 95.8% from Ontario	
In the year 2007, destination visits by guests from the following origin markets accounted for the identified share of out-of-province visitation to Ontario:	
Out-of-Province Visitation	
0.8% of the total 4,853,000 trips to Ontario by guests from other provinces	
2% of the total 15,063,000 trips to Ontario by guests from the United States	
7.3% of the total 2,195,000 trips to Ontario by other international guests	
v. The destination's share of meeting and convention motivated travel to Ontario is significant	◗

In the year 2007, the destination attracted 319,000 meeting and convention-motivated trips, or 4.4% of the total meetings and convention motivated trip to Ontario.	
vi. Total visitation is not dominated by same day guests	◗
vii. The destination's share of visits in Ontario which included activities relying on the destination's core attractions classes is significant	○

In the year 2007, destination visitation which included the activities identified below represented the stated shares of all trips in Ontario which included same activities:

Activity	Ontario	Peel	% of Ontario's visits
Cultural Performances	4,267,000	115,000	2.7%
Museums/ Art Galleries	3,735,000	63,000	1.7%
Sports Events	3,267,000	147,000	4.5%
Golf	2,179,000	54,000	2.5%
Downhill Skiing / Snowboarding	1,282,000	4,000	<1%

viii. The destination's share of the visits identified above are significant in comparison to competitive destinations in Ontario	◗

In the year 2007, the shares identified above compare favourably to the shares held by the destinations shown below:

Activity	Total Overnight in Ontario	Peel	Halton	York	Durham
VFR	19,844,000	3.9%	3.4%	2.4%	2.8%
Cultural performances	3,162,000	2.6%	1.6%	1.8%	<1%
Museums/art galleries	3,382,000	1.7%	1.5%	1.1%	1%
Sports events	1,875,000	3.7%	2.3%	2.2%	2.6%
Historic sites	4,284,000	2%	1.6%	1.4%	1.3%
Golf	1,600,000	1.1%	1.2%	9.4%	1.8%
Downhill	897,000	<1%	<1%	<1%	<1%

F2. The destination offers draws from multiple market segments.

Measure	**Rating**
i. The destination attracts visitors with differing visitor profiles. (See market segments below, e.g. families with young children)	○

The destination attracts visitors with different visitor profiles, including families with children. However, the majority (75%) of visitors are adult only parties. This would include business travelers.

F3. The destination offering draws from market segments over more than one season.

Measure	**Rating**
i. Visitation is distributed among multiple market segments over more than one season	◗

Quarterly distribution of total visitation is distributed as follows:

Q1 - 20.2%	Q2 - 25.8%	Q3 - 25.1%	Q4 - 28.9%

Quarterly distribution of overnight visitation is distributed as follows:

Q1 – 14.7%	Q2 – 31.0%	Q3 – 30.7%	Q4 – 23.6%

Element G: Occupancy and Yield

The Occupancy and Yield criteria and measures assess the destination's market performance in terms of:

- Accommodations base occupancy
- Guest expenditure levels

G1. The commercial accommodations base has occupancy rates in excess of 65%.

Measure	**Rating**
i. The annual average accommodations occupancy rate is over 65%	○
In 2007, the annual average accommodation occupancy rate was 52.8%.	
ii. Occupancy is spread throughout the year	●
Occupancy levels peak in Q3 at 69%. In Q1 occupancy averages at 44.7%, 52.3% in Q2 and 54% in Q4.	

G2. The destination attracts a significant share of total provincial expenditures.

Measure	**Rating**
i. The average expenditure per capita for guests on day trips to the destination is equal to or greater than the provincial average	○
In the year 2007, the average expenditure per capita for guests on day trips to the destination was $46 or 59% of the $78 average for Ontario.	
ii. The average expenditure per capita for guests on overnight trips to the destination is equal to or greater than the provincial average	○
In the year 2007, the average expenditure per capita for guests on overnight trips to the destination was $283 or 95% or the $298 average for Ontario.	
iii. The destination's share of expenditures by guests on day trips is equal to or greater than its share of day trips in Ontario	○
In the year 2007, total spending by guests on day trips to the destination was $114,077,000. Total spending by all tourists on day trips in Ontario was $4,470,338,000. The destination's share of total spending by these tourists was 2.6%. Meanwhile, Peel Region attracted 3.4% of Ontario's day trip visits.	
iv. The destination's share of expenditures by guests on overnight trips is equal to or greater than its share of overnight trips in Ontario	○
In the year 2007, total spending by guests on overnight trips to the destination was $337,601,000. Total spending by all tourists on overnight trips in Ontario was $12,829,287,000. The destination's share of total spending by these tourists was 2.6%. Meanwhile, Peel Region attracted 2.7% of Ontario's overnight trip visits.	

Element H: Critical Acclaim

The Critical Acclaim criteria and measures address the extent to which the destination is recognized as:

- "Must see / must do" on general grounds or those more specific to a given type of experience
- Having a profile that contributes to the attractiveness of Ontario and Canada as a destination
- A top-ranked place to visit

The Critical Acclaim element assesses the extent to which Brampton is recognized as a "must see / must do" destination. It addresses the extent to which the destination has a profile that contributes to the attractiveness of Ontario and Canada and, most importantly, whether Brampton is a "top-ranked" place to visit when compared to other destinations in Ontario. In the simplest of terms it assesses whether Brampton is recognized as standing out from other competitive destinations. Is it a 'must see / must do' destination?

H1. The destination is considered as "must see / must do" and is recognized as a symbol of its type of travel experience.

Measure	Rating
i. The destination is at the top or near the top of the list of places out-of-town guests must be taken, or things guests must do when "seeing the sights' in the wider travel region	○
ii. The destination is at or near top of mind when considering "must see / must do" places or activities offering the same type of travel experience as the destination	○
Brampton does not currently stand out from other destinations and would not be considered must see / must do for the average visitor. The main reason for travel to the destination is business travel or visiting friends and relatives, rather than local attractions. There is not a major iconic attraction or attraction that is must see in the destination – evidenced by the fact that no attractions used to promote visitation to Ontario. However there are opportunities to build 'must see' experiences within the destination. (See recommendations for more details).	

H2. The destination has a role in branding / marketing Ontario and / or Canada.

Measure	Rating
i. Destination imagery of, and / or text about the destination or its core attraction(s) is used in promoting Ontario and / or Canada	○
Currently, there is no imagery and / or text of Brampton used to promote Ontario or Canada. The local tourism industry needs to work together to create experiences unique to the community.	

H3. The destination or its attractions have been ranked "Best in Class" or "Top Tier" in consumer or industry rankings.

Measure	Rating
i. The destination or its core attraction(s) has (have) been ranked as "Number 1," "Best in Class," or "Top Tier"	◗
The Powerade Centre was recognized by The Toronto Sun and Reader's Digest as the 'Best Sports Recreation Facility in the GTA	
ii. Other products or experiences in the destination have been ranked as "Number 1," "Best in Class," "Top Tier," or otherwise recommended	◗
Brampton's Classic Cars & Legendary Stars was listed as a 'Top 100 Festival' by Festivals & Events Ontario in 2008. Other attractions receiving awards were mainly 'Readers Choice' type awards in local reviews.	

Element I: Destination Marketing

The Destination Marketing criteria and measures identify the extent to which the destination:

- Targets viable markets
- Invests in managing and promoting its tourism marketplace
- Consults with the travel trade operators and agents serving area visitors and residents

I1. The destination's product offerings are created and packaged to attract significant market segments with prospects for stability, if not growth.

Measure				**Rating**
i. There is a market demand for the destination's type of offering				●
Main Purpose Of Trip	Ontario Visits (Total: 104,790,000)	Percentage of Total	Peel Region Visits (Total: 3,255,000)	Percentage of Total
Visiting Friends & Relatives	43,377,000	41.4%	2,023,000	62.1%
Business Travel	7,216,000	6.9%	319,000	9.8%
Cultural performances	4,267,000	4.1%	115,000	3.5%
Museums/art galleries	3,735,000	3.6%	63,000	1.9%
Sports events	3,267,000	3.1%	147,000	4.5%
Historic sites	4,526,000	4.3%	105,000	3.2%
ii. Market demand to the destination's type of offering is stable or growing				●

	ONTARIO		PEEL REGION	
Visiting Friends & Relatives	41.4%	40.3%	62.1%	56.4%
Business Travel	6.9%	6.6%	9.8%	9.4%
Cultural performances	4.1%	4.6%	3.5%	2.8%
Museums/art galleries	3.6%	3.4%	1.9%	2.3%
Sports events	3.1%	2.4%	4.5%	2.7%
Historic sites	4.3%	3.1%	3.2%	3.6%

When comparing visitation levels of 2007 to 2006 while in Ontario, more people participated in visiting friends & relatives, business travel, museums and galleries, sports events and historical sites.

When comparing visitation levels of 2007 to 2006 while in Peel, although fewer people participated in museums / art galleries and historical sites, more participated in cultural performances and significantly more participated in sports events.

I2. There is a Destination Marketing Organization (DMO) in place with funding sufficient to sustain awareness and motivate travel from target markets.

Measure	Rating
i. There is a DMO in place with a focus on the local destination vs. a larger travel region	●
The DMO is operated through the City of Brampton's Economic Development Department. There are no other DMOs operating or promoting this destination (example; Peel Region does not have a tourism promotional strategy or budget).	
ii. The DMO is funded at a level sufficient to reach target markets through print and electronic (e.g., internet, toll-free phones, etc.)	○
In order to effectively promote the destination, more funding is required to ensure a consistent message is presented to the community and surrounding area.	
iii. The DMO conducts surveys which track the influence of marketing on guest visits	○
There is currently no guest surveying taking place to gather insight on a visitor's general impression of the destination. It is not possible to determine the percentage of visitors who are influenced by the destination's marketing communications efforts.	

I3. Travel Trade operators and agents have been contacted for advise on product and packaging development opportunities.

Measure	Rating
i. The Travel Trade Resource Checklist has been completed	●
ii. A minimum of 10 "YES's" have been recorded (a minimum of 7 "YES's" is required for a "Partial" response.	○

TRAVEL TRADE RESOURCES CHECKLIST

ATTRIBUTE	YES	NO
1. A complete inventory of receptive tour operators bringing coach or FIT travel to the destination has been compiled.	☐	☑
2. Receptive tour operators have been contacted to identify:		
a. the attractions, accommodations and other facilities visited, and visitation volumes,	☐	☑
b. issues, e.g. parking, that impair visitation or the visitor experience,	☐	☑
c. opportunities to improve the visitor experience and increase visitation, and	☐	☑
d. other assets that, with additional investment could attract group tour visitation.	☐	☑
3. A local receptive tour operator sits on a Workbook implementation committee	☐	☑
4. A complete (smaller areas) or comprehensive cross sectional (larger centres) inventory of local travel agents serving clientele resident in the destination area has been compiled.	☐	☑
5. Travel agents have been contacted to determine:		
a. Their perceptions of opportunities to package travel experiences within the destination area,	☐	☑
b. Their interest in packaging travel experiences within the destination area,	☐	☑
c. Their perceptions of opportunities to improve the visitor experience and increase visitation to the area.	☐	☑
6. A local travel agent sits on a workbook implementation committee	☐	☑

I4. A tourism development and marketing strategy is in place.

Measure	Rating
i. A destination development and marketing strategy focusing on growth in visitation and / or yield has been developed and is being implemented	◗
A tourism operating and marketing plan was developed in 2005, while a new strategy for tourism will be developed upon completion of this project.	

I5. Performance towards the development plan's objectives is being monitored.

Measure	Rating
i. A program for tracking progress towards objectives is in place	○
A Strategic Plan for tourism will be created based on the outcomes / findings of this report. The strategy is to be completed by September 2009 and will include measures of completion and ROI.	

I6. Customer service training programs are in place.

Measure	Rating
i. There is a customer service training program in place at the key experience / activity providers, as well as programs for the service community generally	◗
The destination does not currently offer service training for the tourism industry however 19 of 36 respondents indicated they do offer some type of training at their business. Most of this training is offered by hotel chains or restaurant and is related specific job requirements or SmartServe type training. Overall destination training is not currently provided but the industry indicated this as a priority or idea of interest at the first industry planning session. Based on limited visitor centre offerings, the idea of training 'ambassadors' at different attractions/accommodations/transportation co's, etc. was discussed.	

Element J: Product Renewal

The Product Renewal criteria and measures assess the extent to which the destination is making capital investments in its attractiveness into the future.

J1. Reinvestment and new investment is occurring to enhance, revitalize or develop facilities relevant to the quality of the tourist experience.

Measure	Rating
i. In the past five years, capital has been invested in facility renewal, expansion or development	●
72% of respondents indicated they have made capital investments in the last 5 years.	
ii. A significant portion of that investment occurred in the past two years	◗
91% of investors did so in past 2 years, investing $3.685m and 83% indicated that if capital is available they will invest in the future.	
iii. Core attractions demonstrate an ongoing commitment to reinvesting in programming and other improvements in order to enhance the visitor experience	●

Infrastructure funding was awarded to Brampton to enhance the grounds and facilities at Chinguacousy Park as well as fund the city's development work needed in the community planned for the Mount Pleasant Transit Hub. The funding will help build such things as bike lockers, a transit passenger facility, civic square and village green and restore the historic Canadian Pacific Rail station. Work at the park includes enhancement of picnic areas, playgrounds, BMX track, tennis courts, watercourse, pond and the expansion of buildings. Peel Region has received funding for the expansion and revitalization of the Peel Heritage Complex in downtown Brampton.

J2. Investment and reinvestment in underdeveloped or underperforming assets is occurring.

Measure	Rating
i. Underdeveloped and underperforming assets (or the absence of same) have been identified in the Resource Audit	●
The Resource Audit identified underdeveloped and underperforming assets. More detail can be found in the Tourism resource Opportunity Matrix.	
ii. Investments and / or reinvestments are being made in developing or revitalizing underdeveloped or underperforming assets	◗
Some underdeveloped assets have been highlighted throughout this report. For example, the local residents are a great asset based on the fact that 62% of people are in Brampton to visit people who live here. These residents need to be educated on the value and importance of local attractions. Another example of underdeveloped assets is the area of Farm markets and pick-your-own. There wasn't a single attraction or event that indicated they operate at full capacity so there is room for growth and development across all sectors.	

Element K: Managing within Carrying Capacities

The Managing within Carrying Capacities criteria and measures assess the extent to which the destination is aware of, and manages within, the capacity thresholds of its:

- Local economy
- Ecosystems setting and soft services infrastructure
- Guests' satisfaction levels
- Hard services infrastructure
- Administrative systems

K1. Destination visitation generates economic benefits to the host community.

Measure	Rating
i. Guest visits and expenditures make a net positive contribution to the local economy	●
Visitor spending generated $17,065,000 in municipal tax revenues in 2007 for the Region of Peel. It is unknown, based on the collection of data, if benefits and costs are balanced equitably across municipal boundaries. In 2007 visitors spent $438,794,000 in Peel Region, generating $282,634,000 direct and indirect contributions to the Gross Domestic Product, $ 169,800,000 of labour income, 4,851 full-time and part-time jobs, and tax revenues totaling $164,962,000.	
ii. Benefits and costs are balanced equitably across municipal boundaries	**Unknown**
Because the data listed here is Regional, it is unknown how evenly it is dispersed throughout the three municipalities.	

K2. Visitation does not consume local resources or increase their values to an extent that the local population is negatively affected.

Measure	Rating
i. Attractiveness of the destination to recreational or retirement home or investment markets has not bid up the cost of housing to the extent that it is unaffordable to the locally employed population	●
The City of Brampton does not attract recreational, retirement homes and investment markets that would bid up the cost of housing to the extent that it is unaffordable to the locally employed population. Although real estate prices are escalating (average 4.2% per year from 2006) the population growth (average of 4.0% per year from 2006) has likely increased the demand for housing.	
ii. Where labour pool constraints are occurring, a plan to resolve the problem is being implemented. (Record N/A below if preceding answer is "Yes."	**N/A**
iii. Servicing guest visitation, or the investment to attract and accommodate it, does not consume labour or materials to the extent that their cost or availability to other sectors is impairing those sectors' profitability	●
iv. Where resource cost or availability impacts are occurring, a plan to resolve the problem is being implemented. (Record N/A and leave the boxes blank if the preceding answer is "Yes."	**N/A**

K3. Trained labour is available to serve visitation demands at a level that maintains guest satisfaction.

Measure	Rating
i. There is a labour pool sufficient to accommodate current and projected levels of visitation	●
In 2005, Brampton's workforce was 230,238 with a population of 413,000 and an unemployment rate of 5.7%. The resource audit confirms that the industry felt there was sufficient trained labour available.	
ii. Where labour pool constraints are occurring, a plan to resolve the problem is being implemented (Record N/A and leave boxes blank if preceding answer is "Yes."	**N/A**
iii. Guest surveys confirm satisfaction with hospitality and service	**Unknown**
Due to the limited amount of guest survey information available from individual businesses, it is unknown if guests are satisfied with hospitality and service.	
iv. Where dissatisfaction has been identified, a plan to resolve the problem is being implemented (record N/A and leave boxes blank if preceding answer is "Yes."	**Unknown**

K4. Carrying capacities of the natural systems that sustain local ecosystems and quality of life are not overwhelmed by the destination visitation.

Measure	Rating
i. There is an environmental monitoring program in place which provides early warning that the quality of the resource or the visitor experience is at risk of being impaired	●
Public consultation is a vital part of the EA process in Peel Region and Public Information Centres or PIC's are held in the community as well as consultations with municipal councils, review agencies, interest groups, and property owners. A Municipal Class EA is a five phase study that identifies potential positive and negative effects of projects such as road improvements, facility expansions or to facilitate a new service.	

The process includes an extensive evaluation of impacts on the natural and social environment, which includes the impacts to plants and animals, soils, traffic patterns, and to residents and businesses in the community. The Municipal Class EA applies to municipal infrastructure projects including roads, water and wastewater projects. Since projects undertaken by municipalities can vary in their environmental impact, such projects are classified in terms of schedules.	
ii. There is a community health and well-being monitoring program in place that provides early warning of whether the quality of life impact thresholds are being approached	●
A Picture of Health: A Comprehensive Report on Health in Peel 2008 was the first report produced by Peel Public Health to provide the big picture on the health of the citizens in Peel Region. It provides a wide range of information about the state of, and the factors that influence health locally. This report is a snapshot of health conditions which have significant impact on the population: highlighting those which are changing, and those which are most amendable to prevention.	
iii. Evidence from formal monitoring programs or informal observations indicates that no capacity / thresholds are being exceeded	●
iv. Where the environment or quality of life are at risk or being impaired, a plan to resolve the problem is being implemented	**N/A**

K5. Growth in visitation to the destination is not threatening the experience enjoyed by current visitors.

Measure	Rating
i. Overcrowding, overuse, diminished quality of the environment or diminished quality of the guest experience are not being used as issues by guest surveys or by managers of facilities and resources	●
The City of Brampton has not received any feedback from guests or residents to indicate a diminished experience due to visitation growth. It is also important to note that although19 of 36 respondents indicate they reach max capacity during top three busiest months, based on visitation / attendance stats, this would only occur on certain days within that period.	
ii. If issues are raised, they relate to one or two peak weekends only	**N/A**
iii. A response to identify issues has been defined and is being implemented	**N/A**

K6. Infrastructure is available to accommodate current or projected levels of demand without exceeding carrying capacities.

Measure	Rating
i. There is current / planned water treatment and delivery capacity to accommodate current and projected levels of visitation	●
ii. There is current / planned sewage treatment and trunk capacity to accommodate current and projected levels of visitation	●
iii. There is current / planned road, transit, parking and trail capacity to accommodate current and projected levels of visitation	●
iv. Assessments of the environmental effects of infrastructure expansions have been completed, with effects considered manageable and acceptable	●

K7. Municipal entities with approval authority are able to address development applications in a timely manner.

Measure	Rating
i. Local and upper tier (where present) Official Plans have tourism related objectives and policies in place	◗
At the local level, Brampton has included tourism related objectives in the community Strategic Plan, “The Six Pillars” There is currently no tourism initiatives/strategy being implemented by the Region of Peel.	
ii. There is a political will to move forward with those projects considered to further the objectives expressed in the Official Plan or other planning documents	●
iii. There are sufficient administrative resources in place to efficiently manage review, approvals and permit processes	●

CONCLUSION

As Premier-ranking status is considered, it is important to remember that 'premier,' typically meaning 'first,' would require that only one destination be given this title or rank. More loosely, Premier-ranked may contain 'top tier' entities suggesting that "Premier-ranked" be considered from two different perspectives.

1. As an absolute where there would only be a few Premier-ranked destinations in the province or a specifically classified Premier-ranked destination (for example a "Premier-ranked Performing Arts Destination."
2. As a tier-oriented concept where areas are classified by virtue of operating at the highest level they can achieve – 'being the best they can be.'

The most important consideration for Brampton Tourism lies in the fact that the City of Brampton has shown interest and desire to grow and develop the tourism industry in the area. This is evident by the fact that resources have been dedicated to tourism (both financial and human) for a number of years, there was support for implementing the Premier-ranked Tourist Destination Framework Project and that the information obtained from this study will be utilized in the creation of a five-year tourism development strategy.

When considering the findings related to Brampton's Product, Performance and Futurity, it is difficult at this time to consider the destination among the "Premier-ranked" using either of the perspectives above. Reference to the Performance Summary shows that Brampton Tourism ranked ' partial' or 'no' in regards to all three categories.

Within the Product Dimension, there is good potential for the creation and development of core attractions and satisfaction & value. Accessibility and Accommodations currently perform well however development initiatives are required to increase the quality and critical mass of products.

Areas of Performance ranked the weakest and will require attention as a tourism strategy is developed. It is important to consider the strong relationship between product offerings and performance. As core demand generators are developed, new investment attraction takes place and consumer's satisfaction increases, performance measures will be positively impacted and critical acclaim through media and word-of-mouth will undoubtedly improve.

Brampton Tourism and the City of Brampton met the criteria for Managing within Carrying Capacities and Product Renewal. It was only the area of Destination Marketing that mandated the 'partial' response in this category. Marketing resources and tactics will need to be balanced in the tourism strategy moving forward as product development initiatives warrant.

Overall, Brampton's initiative, investment and determination in creating a 'Premier-ranked' tourist destination should be recognized as the first and most important step in arriving there.

Based on the following recommendations, stakeholders will work with Brampton Tourism in the creation of a tourism strategic plan and findings from this report will remain the benchmark that Brampton Tourism will utilize to evaluate their successes moving forward.

RECOMMENDATIONS

Distinctive Core Attractions

1. More work needs to be done to create / develop / build core attractions.

   a. Business Travel
      - Hotels need to coordinate and cooperate to attract conferences.
      - Hotels need to ensure they are providing service standards that corporate travelers expect: business services access – fax, copying, printing; complimentary internet in guestrooms; room service

   b. Sports Travel
      - Hotels need to coordinate and cooperate to attract sports tournaments.
      - All tourism stakeholders need to cooperate to attract tournaments – hotels, restaurants, attractions, shopping. Tourism Brampton can play a key role in coordinating bid submissions, creating promotional material for distribution to tournament organizers.
      - The proposed Cricket Pitch that is part of the 2015 Pan Am game bid will provide another opportunity for Brampton to promote as a 'unique' tourism opportunity.
      - Ensure industry and local committee is aware these things are happening.

   c. Visiting Friends and Relatives
      - This is an important market for Brampton. More focus on local residents is required to ensure that they are aware of what is available in the community and that they are encouraging their guests to enjoy the community assets. Marketing, publicity efforts need to be focused on the local residents. Local residents need to be educated on all there is to do in the city.

2. Utilize physical and historical linkages to create 'uniqueness ' or product
   a. Canada's Flower City
      - Although there isn't currently a linkage to the existing tourism product, there is an opportunity to develop on-theme activities and events that will not only benefit tourism businesses and attract new visitors, it will enhance the overall theme the City is trying to pursue and promote community spirit around it.
        - Consider activities like the large branded flower pots, themed gardens at businesses throughout the community, development of heritage gardens (ie. Hybrid Roses and heritage orchids specifically grown in the area), enhancement of floral events and incorporation of floral themes to other existing events, flower pot garbage containers in downtown, murals, etc.
        - Tell the Story – (Rule #16 – Great Stories make Campfires memorable!) It is important that we 'connect the dots' with this Flower city theme. Ensure local residents know the story and are interested in the story and pass it on. Visitors should not question 'What makes Brampton Canada's flower city?'.
      - Take advantage of physical location within the GTA and nearness of major market. Find ways to 'package' (either single price point or promoted as an itinerary) enough product to encourage someone to drive 1 hour (that is 4 hours of entertainment that cannot be found closer to home)

3. Continue to pursue what makes Brampton unique / different. At the June industry session, some time was spent brainstorming this issue.
    a. Flower City Heritage – The Rose production worldwide, largest collection of greenhouses (need to discover what still remains), inventory current plantings, partner with local horticulture groups, create signature beds at businesses, incorporate music events, award programs for residents, build winter gardens as part of winter lights festival
    b. Oldest concert band in Canada
    c. Home town of Russell Peters
    d. Create largest winter lights show (keep it green? – possibly largest, greenest winter lights festival?)
    e. 100 official languages spoken, 70 different cultures
    f. Use South Asian population – create Bollywood Film Festival, Culinary Tourism, 'refresh' Carabram celebration
    g. Largest Women's Hockey Tournament – in Guiness book of world records with teams coming from around the world. In 2009 there were 400 teams participating. (I think you need to verify this is still the largest – contact tournament organizers)
    h. Possible "Cricket capital" or Canada / Ontario (based on community culture and possible Pan Am games)

4. Although the destination has a product positioning statement, more work needs to be done to connect this to the current (and 'to be developed') tourism assets. The development of a 'branding work group' to build a plan is recommended.

5. Build products and promotions based on the 4x rule of providing four times the entertainment for the length of time it takes to get to the city.

6. Look for product development and packaging opportunities to attract more market segments – ie. families (your VFR market can make this easy to accomplish).

7. Be mindful of winter / off season conference and sport attendees. Ensure there are things for them to engage in when seasonal businesses are closed. Work on the possibility of seasonal businesses opening during major events (ie. Largest Women's hockey tournament)

Quality & Critical Mass

8. Engage the tourism industry in workshops and opportunities to encourage 'team effort.' By grouping products together that appeal to certain audiences, more partners are at the table for cooperative marketing opportunities and creating reasons for longer lengths of stay. Encourage partners to invest together for greater impact and clear messaging.

9. Create packages with overnight accommodators to increase the number of overnight visitors and spending in the city.

10. Incorporate educational forums for operators to learn how to make their products easier to buy (i.e. online, at other locations – for example, consign tickets to the 'info centre' at the local shopping mall).

11. Restaurants are a vital part of a successful tourism industry. There are a number of quality restaurants in Brampton, located in proximity to tourism attractions. Of the $451,678,000 spent in Peel Region in 2007, 26% or $116,025,000 was spent on Food & Beverage. Restaurants need to be engaged with other tourism businesses and with each other. They need to be communicated to on large events that are in town as well as day to day operations of nearby tourism attractions (ie. Rose Theatre shows ending, restaurants need to be open).

Visitor Spending	
Total	$451,678
Public Transport	$69,771
Vehicle Rental	$14,996
Vehicle Operations	$47,691
Local Transport	$3,917
Accommodation	$64,134
Food & Beverage	$116,025
Recreation & Entertainment	$38,618
Retail / Other	$96,525

Satisfaction and Value

12. Data collection / research – training and implementation planning / tracking should be implemented. Coordinated effort among Brampton Tourism and Industry stakeholders is required to make this successful.
    a. Implement a training session for interested tourism stakeholders (Speak with Caroline about Tourism Inc. Tracking Workbook / Session)
    b. Implement on-line survey with incentive prize to encourage guests to log-on when they get home

Accessibility

13. Discuss opportunity / need for a shuttle (paid in part by accommodations) to take guests to various local attractions.

14. Visitor Information Centre / Services should be located in easily accessed locations and able to provide tourist information on a 24 hour basis. Discuss potential partnerships to incorporate tourism info with shopping mall information centres. Look for high-traffic locations (downtown) for tourism displays – include maps with operator listings, contact info and locations, for example.

15. Search for additional information on the Signage Program currently being created. Brampton Tourism should secure a roll or 'seat at the table' in the design and implementation to ensure that the program will meet the needs of the tourism industry and visitors.

Accommodation

16. Need to have the amenities and service issues available to properly serve the markets.

Visitation

17. Increase partnerships and promotions in order to encourage longer length of stay and increased spending.

Critical Acclaim

18. Once 'unique' product established, create Public Relations program and work with provincial, Toronto marketing groups.
19. Source travel writers in the local area and build relationships. Consider membership in TMAC (Travel Media Association of Canada – www. Travelmedia.ca). There is an annual conference (usually held across Canada but is in Wales in 2010) that provides industry an opportunity to learn about travel media and network with writers. Meet & Greet / networking events are also held in local chapters throughout the year.
20. Moving forward, look for opportunities to gain / earn awards for events and attractions – i.e. Top 100 Festivals, Best Attraction, etc.

Destination Marketing

21. Create a tourism marketing plan in consultation and partnership with tourism stakeholders. Plan should include a program / focus on:
    a. Sports tourism, Business travel, VFR (Visiting Friends and Relatives) market
    b. Utilizing new web based technologies like You Tube, Google Maps, etc. It will also be important to incorporate more information on the tourism website that engages core attraction visitors (sports groups, business groups, etc.). Enhance websites to incorporate all tourism activities (currently golf is missing, events listings is confusing from visitor perspective because community type events are included, more details on meeting facilities)
    c. Programs that encourages local residents to engage their visiting friends and relatives in local activities. This can include discount programs and publications distribute to New Home Owners.
    d. A strong public relations program.
    e. There is a good base of tourism products in the downtown that needs to be actively promoted. It offers good reason and enough activity to meet the 4x rule.

22. Look for opportunities to partner with local media resources, provincial marketing associations and other nearby tourism associations (Mississauga, Toronto)

23. Ensure a strong media program is incorporated into the marketing plan. Statistics show that 10% purchase based on an ad they see, 40% based on an article they read and 50% based on a recommendation from someone they know.

24. Provide educational and partnership opportunities to local tourism stakeholders on working with the Travel Trade market.

a. Contact Caroline for more information on the “Working with the Travel Trade” workshop available at the Ministry of Tourism.
b. Develop relationships with travel trade operators and create marketing opportunities – website page, publication, etc. for travel trade industry.
c. Coordinate opportunities to encourage partnerships among industry operators (ie. Rose Theatre attends OMCA – for them to be successful, they need information on other things to do and places to eat in order to encourage trips to the area).

25. Ensure tracking / ROI mechanisms are included in marketing and development plans.

26. Create and implement a ‘tourism ambassador’ program that enables front line tourism associates (including taxi /transportation drivers) to provide better customer service, encourage longer stays and more spending in Brampton.

Product Renewal

27. Continue to showcase new capital investments in tourism industry.

28. Encourage continuous redevelopment of product – ie. Theatres bringing in new shows that meet current needs of visitors and coordinate with destination theme, restaurants offering seasonal fare, museums continuously updating / changing displays, etc.

Managing Within Carrying Capacities

29. Provide advocacy opportunities and ensure tourism has a seat at the table and is recognized as an important player in initiatives that impact the industry. (ie. sports park development, signage program, etc.)

30. Encourage and provide opportunities for the tourism industry to engage at council meetings when tourism initiatives are on the agenda.

Industry Development

31. Create opportunities to engage the industry in networking and training – from partner breakfasts, luncheons or full-day conferences.

Implementation

32. Create smaller working groups of industry stakeholders to implement this strategy. The industry is engaged and interested in participating in the direction and implementation of tourism initiatives.

33. Create a strategy to be implemented over the next 5 years. Prioritize the initiatives based on industry priority and ability to participate, looking for items to create immediate results.

34. Present new tourism strategy prior to 2010 budget process to secure funding for the upcoming year. Engage tourism stakeholders in presentation and communication with local politicians.