

## **Toronto's Premier Ranked Tourist Destination Project Results – Making Toronto the Best it Can Be**

<b>Date:</b>	April 30, 2008
<b>To:</b>	Economic Development Committee
<b>From:</b>	Duncan H. Ross, Executive Director – Tourism Economic Development, Culture and Tourism
<b>Wards:</b>	All
<b>Reference Number:</b>	P:/2008/Cluster A/EDCT/ECON DEV/ed0805-019

### **SUMMARY**

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This report summarizes the key findings from a comprehensive assessment of Toronto's strengths and weaknesses as a tourist destination. The findings were evaluated and discussed with industry stakeholders to develop recommendations for achieving greater prosperity as a tourist destination in the future.

The research and evaluation process was industry-led. The project was highly collaborative, with an industry steering committee providing direction. Staff from EDCT-Tourism managed the project, and an experienced private consultant and Ministry of Tourism staff provided advice and guidance. Approximately 100 representatives from across the sector were consulted in developing the recommendations. They were validated at a presentation to the industry on December 10, 2007.

The report explains why a strong tourism sector is needed to support Toronto's overall success as a globally competitive city. Its recommendations are aligned with those that emerged from the *Agenda for Prosperity: A Prospectus for a Great City*.

Implementing the recommendations will require continued collaboration across the industry and with the public sector. The report describes the implementation process that has been ongoing since the research was completed in December 2007. The City of

Toronto has an important role to play in this process. The recommendations of the report seek City Council's endorsement of the recommendations and authorization for staff to discuss it with other City divisions, agencies, boards and commissions to determine how they can best support the strength of Toronto's tourism sector.

## **RECOMMENDATIONS**

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### **The Executive Director of Tourism recommends that:**

1. City Council endorse the "Premier Ranked Tourist Destination Project Research Summary and Recommendations" as a guide for strengthening Toronto's tourism sector within the context of the "*Agenda for Prosperity: A Prospectus for a Great City*".
2. The Economic Development Committee invite the Toronto Destination Development Leadership Group to present the Premier Ranked Tourist Destination (PRTD) Implementation Strategy to the Committee when it is completed.
3. The General Manager of Economic Development Culture and Tourism, in consultation with the Destination Development Leadership Group, be directed to:
  - a. facilitate discussions with other City Divisions, Agencies, Boards and Commissions about the PRTD project findings and recommendations, and the role they each can play in supporting the strength of the tourism sector;
  - b. co-ordinate the inclusion of the results from those discussions in the PRTD Implementation Strategy; and
  - c. continue to provide support to the tourism sector and to use the PRTD recommendations and implementation strategy as a guide to setting work program and budget priorities.
4. The appropriate officials be authorized to take the necessary actions to give effect thereto.
5. The volunteers from the sector who participated on the PRTD Steering and Advisory Committees as well as the Ministry of Tourism and Employment Ontario be thanked for their contributions to the project.

### **Financial Impact**

There are no direct financial implications resulting from the adoption of this report.

## DECISION HISTORY

City Council at its meeting of February 1, 2005 adopted Clause 13 of Economic Development and Parks Committee Report No. 1, thereby supporting Toronto's participation in the Premier Ranked Tourist Destination Framework process.

<http://www.toronto.ca/legdocs/2005/agendas/council/cc050201/edp1rpt/cl008.pdf>

The Project costs were covered by contributions from the Ontario Ministry of Tourism, Service Canada and from the Tourism Section's base Operating Budget (primarily staff resources).

The resources necessary to undertake the project were secured from the various partners in November 2006, and the project commenced. At its meeting on February 5-8, 2007, City Council appointed Councillor Michael Thompson as its representative on the project steering committee.

<http://www.toronto.ca/legdocs/mmis/2007/ed/bgrd/backgroundfile-700.pdf>

## ISSUE BACKGROUND

The Premier Ranked Tourist Destination Framework is a tool developed by the Ontario Ministry of Tourism to help municipalities assess their strengths and weaknesses as tourist destinations. Approximately twenty municipalities and regions across the province have now used the framework, including all municipalities within the Golden Horseshoe.

The assessment is completed by industry stakeholders and supported by Federal, Provincial, and Municipal government resources and staff. It begins by undertaking a comprehensive inventory of the destination's tourism assets. The inventory is then summarized and presented to committees of industry stakeholders. These stakeholder committees are engaged in a series of structured discussions to evaluate the inventory against the framework's criteria and benchmarks. The criteria are based on attributes considered essential if a destination is to be "A Place more attractive than the rest, a place the tourist should consider first – in other words, A Premier Ranked Tourist Destination". The evaluation then guides the steering committee's discussions and decision-making about future plans and priorities for action. The workbook and evaluation guide is available at [www.premier-ranked.ca](http://www.premier-ranked.ca).

Undertaking Toronto's Premier Ranked Tourist Destination (PRTD) project in 2007 was particularly timely. Since 2003, a Five Year Tourism Development Action Plan has guided EDCT's work program in tourism development.

(<http://www.toronto.ca/legdocs/2003/agendas/council/cc030624/edp5rpt/cl003.pdf>). The directions provided by the PRTD project will replace the Five Year Plan as our strategic guide for strengthening the sector.

In addition, the project supports the policy directions for Toronto's overall economic competitiveness and growth contained in "*Agenda for Prosperity: A Prospectus for a Great City*" (<http://www.toronto.ca/prosperity/index.htm>). The research findings and insights from discussion were shared between the two projects. As is further discussed below, the recommendations emerging from the PRTD project support the Agenda for Prosperity by providing more detailed direction as to how Toronto's tourism sector can be strengthened.

## COMMENTS

### Tourism and the Prosperity Agenda

The Prosperity Agenda is based upon the premise that the 21st century will be the century of cities and their role in shaping a global economy. Increasingly, the route to prosperity will lie in cities and businesses adopting a global perspective and building success in the global marketplace. Based on the review that was conducted of international practices, local knowledge, and the experience of business, labour, academic and community leaders, the Mayor's Economic Competitiveness Advisory Committee framed the Prosperity Agenda around four pillars:

- Pillar 1: Proactive Toronto – Positive Business Climate and can-do attitude
- Pillar 2: Global Toronto – Internationalization
- Pillar 3: Creative Toronto – Productivity and Growth
- Pillar 4: One Toronto – Economic Opportunity and Inclusion

The background report, "*Towards an Agenda for Prosperity: Toronto's Place in the World*" by Greg Clark (<http://www.toronto.ca/prosperity/pdf/towards-agenda-prosperity.pdf>), assesses the economic development characteristics of successful global cities and what world cities do to stimulate growth. It identifies that a common feature of all world cities is the interplay among four highly globalized functions: creative and cultural activities, finance and business services, power and influence and tourism. This is illustrated in the following schematic, reproduced from the report. The resulting web of synergistic activity builds new forms of economic activity and encourages agglomeration between sectors and leading firms.

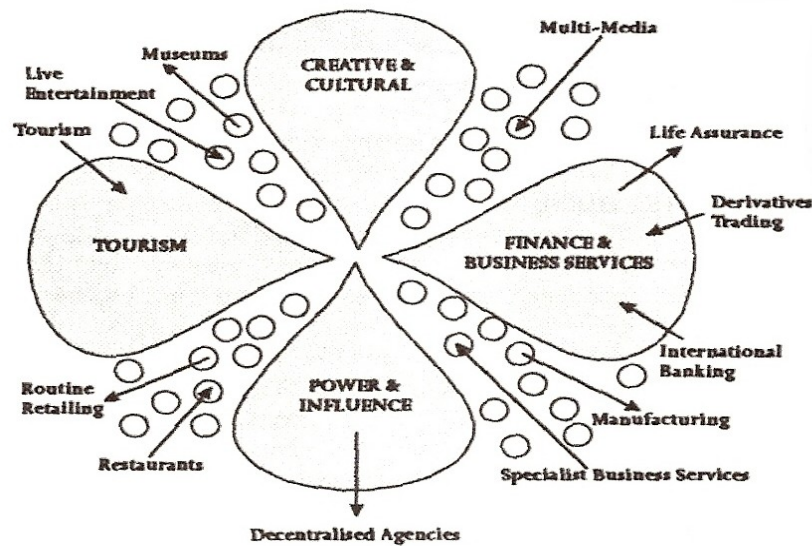


FIGURE 1: THE WORLD CITY – REGIONAL ECONOMY

Clark discusses tourism as one of a number interconnected markets. To quote, “*today’s tourist is tomorrow’s student, is next week’s inward investor, global strategist or senior diplomat; they are the same people in different roles.*” (p. 26).

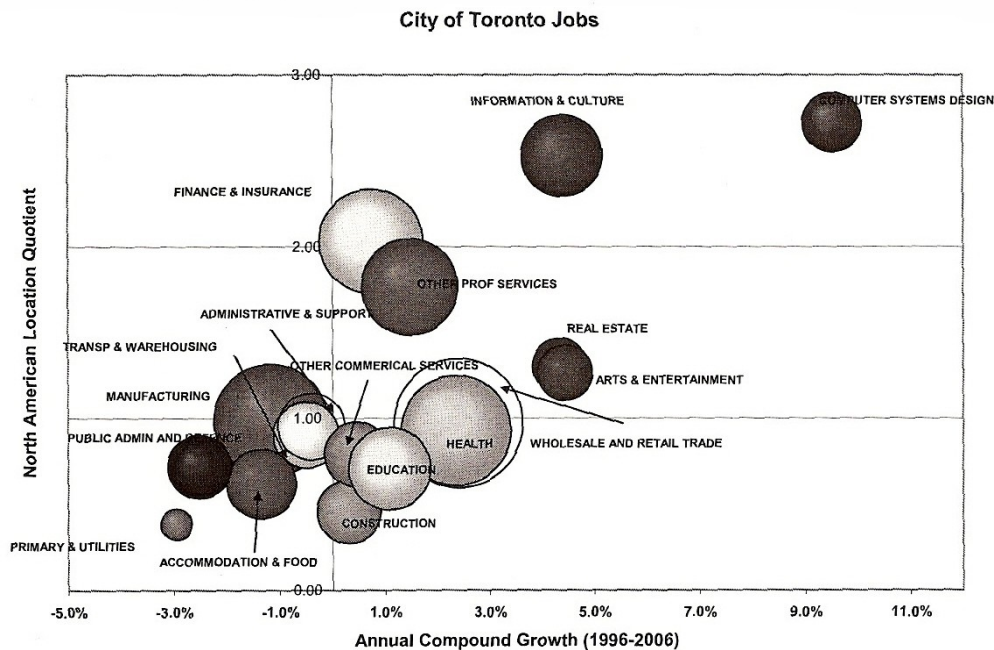
Therefore a strong tourism sector and an international profile as a tourist destination are key prerequisites to success as a global city – the second pillar of the Prosperity Agenda. It also is synergistic with creative and cultural activities, creating additional markets for local artists and venues. A strong tourism sector supports Pillar Four of the Agenda for Prosperity by creating many entry-level job opportunities for first generation Canadians and young people.

How does Toronto’s tourism sector measure up in supporting the city’s global competitiveness and prosperity?

The background reports to the Prosperity Agenda uncovered a few weaknesses:

1. In his discussion of the Anholt Index of international brands, Clark noted that Toronto ranked 12<sup>th</sup> in the world in 2005. Its strengths were being perceived as having warm, friendly people, for making people feel as though they would easily fit in with their language and culture, for its level of safety and public amenities, and for being able to find a job easily. Toronto’s brand was weakest in the attributes “things to do” and “have you visited it”, suggesting a weak international profile as a tourist destination. (“*Toronto’s Place in the World*”; p. 58-59)

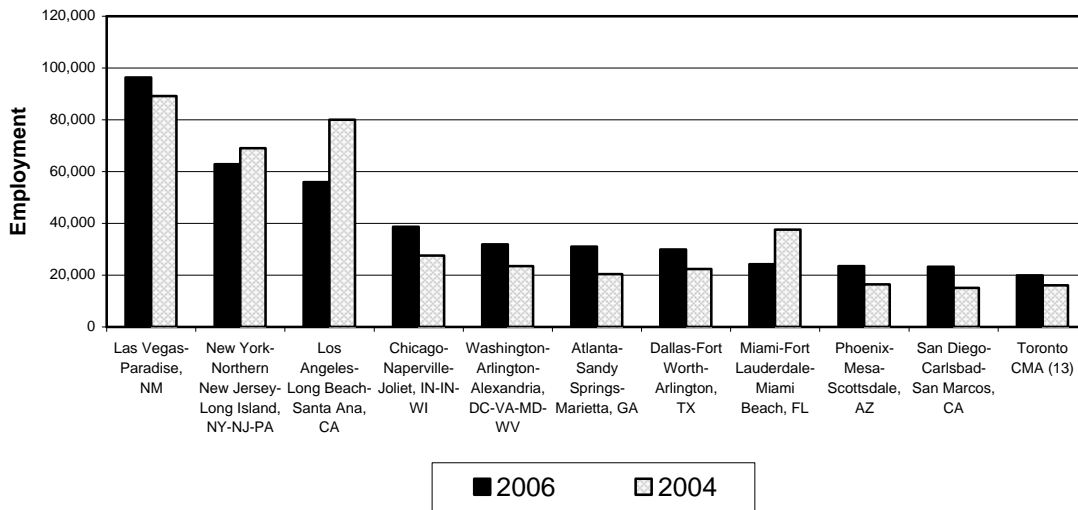
2. Figure 2 shows that the Accommodation and Food sector experienced a significant percentage decrease in employment between 1996 and 2006. The City's Location Quotient in Accommodation and Food employment is slightly less than one. This means that compared with North America as a whole, the City has a somewhat below average concentration of employment in the Accommodation and Food sector. (Source: [http://www.toronto.ca/prosperity/pdf/benchmarking-Toronto-ec\\_performance.pdf](http://www.toronto.ca/prosperity/pdf/benchmarking-Toronto-ec_performance.pdf); p 19)
  
3. Figure 3 shows that the Toronto CMA has the 13<sup>th</sup> largest concentration of accommodation employment in North America. Employment increased slightly between 2004 and 2006, but less significantly than in many of the cities included in the analysis – most notably Las Vegas, Chicago, Washington DC, Atlanta, Dallas-Ft. Worth, Phoenix and San Diego. (Source: *EDCT-Economic Development: Toronto and U.S. Sector Comparisons 2004 to 2006*)



Source: City of Toronto Econometric Model, Labour Force Survey and US Current Population Survey

Figure 2. Toronto Sectors' Change in Employment 1996-2006

**Accommodation Employment, Top 10 U.S. MSAs and Toronto CMA**



**FIGURE 3**

Whereas the research behind *The Agenda for Prosperity* examined the entire Toronto economy in a global context, the Premier Ranked Tourist Destination Project was a detailed audit and evaluation of Toronto’s tourism assets. The research that was undertaken is summarized and documented in a 230 page research report. A consultant (Brain Trust Marketing & Communications) was retained who has facilitated PRTD projects in nine other municipalities. He guided the research team, facilitated discussions with industry stakeholders and interpreted the results to develop recommendations for the future. His work is summarized in the report “*City of Toronto Premier-Ranked Tourist Destination Project Research Summary and Recommendations – Making Toronto the Best it can be*”. The Final Research Report and the Summary and Recommendations Report are both available for downloading at [www.toronto.ca/tourismstudy](http://www.toronto.ca/tourismstudy).

The following pages summarize the highlights from the research, evaluation and recommendations without repeating them. People are referred to the companion documents cited above to fully understand the findings and recommendations.

### **The Toronto PRTD Project**

The Ministry of Tourism designed the PRTD process to guide the industry through a process of shared learning and collective decision-making as to how best to build a stronger tourist destination. It is very much an industry-led process, with staff managing the research process and presenting the results to industry stakeholders for their consideration and conclusions. A nineteen member Steering Committee led the Toronto project (see Attachment No. 1). Over seventy additional volunteers from across the industry provided their input through individual consultations and through advisory committees representing the accommodation, retail, attractions, food & beverage sectors.

The conclusions and recommendations were validated at an industry-wide meeting on December 10, 2007.

Both primary and secondary research was undertaken. A database of 2588 businesses considered likely to serve tourists as a component of their activity was created and a detailed questionnaire sent to them. 847 surveys were returned. Over ninety reports and studies with a bearing on tourism in Toronto were reviewed and summarized. This information was evaluated using the PRTD workbook as a guide. The implications of the findings were considered by the project consultant and staff, and discussed with the Advisory and Steering Committees who provided many additional observations and insights.

### **Canada's Top Tourist Destination**

Toronto attracts about 20 million visitors a year. It is unrivalled in Canada as the country's strongest destination for business and convention travel, visiting friends & relatives, pleasure travel, and travel for other purposes (e.g. personal business and medical appointments). It has excellent tourism infrastructure in the way of accommodation, convention and meeting facilities, and access to other regions of the world. It has many widely acclaimed iconic attractions and scores of major annual events and trade shows.

The PRTD research comprehensively catalogued and benchmarked Toronto's tourism assets. Pages 20 through 100 and Appendix 1 (pp. 226-229) of the Research Report summarize Toronto's tourism product and infrastructure. The range and depth of product offering surprised most industry stakeholders and challenges the findings of the Anholt Index findings referenced previously. A few of the many facts uncovered include that Toronto has:

- Significant internationally-acclaimed iconic attractions such as the CN Tower, Royal Ontario Museum, Hockey Hall of Fame, Toronto Zoo, Casa Loma, Ontario Science Centre, Art Gallery of Ontario;
- Over 5,600 live theatre, dance, and music performances a year;
- Over 150 annual festivals, some with international profile such as the Toronto International Film Festival, Caribana and Pride Week;
- 63 annual significant sports events;
- 40 sightseeing tour companies;
- 90 annual consumer shows;
- Many distinctive neighbourhood shopping districts offering an array of ambiances, architectural styles, multi-cultural experiences, browsing, shopping,



dining and entertainment opportunities; 63 districts are supported by Business Improvement Areas;

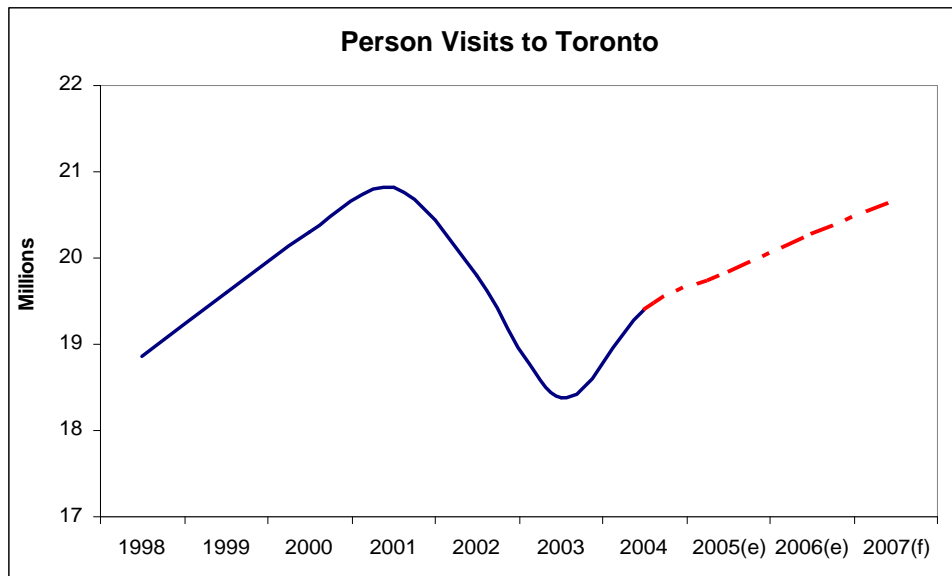
- 8,000 hectares of green space, including an island, an extensive ravine and trail system, waterfront parks and beaches; and
- 217 year-round accommodation properties offering 26,773 rooms at prices ranging from \$30 to \$1000 a night.

Tourism activity is concentrated in the downtown area, but not exclusively so. About one third of the PRTD survey respondents are located outside of the downtown. The distribution is illustrated on the map in Attachment No. 2 (*p. 218 of the Research Report*). Attractions such as the Ontario Science Centre, Pioneer Village, Woodbine Racetrack and the Toronto Zoo currently are attracting significant numbers of tourists to neighbourhoods outside the city core. There are opportunities to build on these nuclei to encourage visitors to explore more of the city.

Toronto's strength as a tourist destination notwithstanding, Figure 4 shows that annual visits to Toronto decreased sharply between 2001 and 2003. It is estimated that visits have increased each year since 2003, but at a fairly modest rate. Although Statistics Canada has yet to release the data that will make an accurate comparison possible, it appears that 2007 visitation levels may again be approaching the levels achieved in 2001.

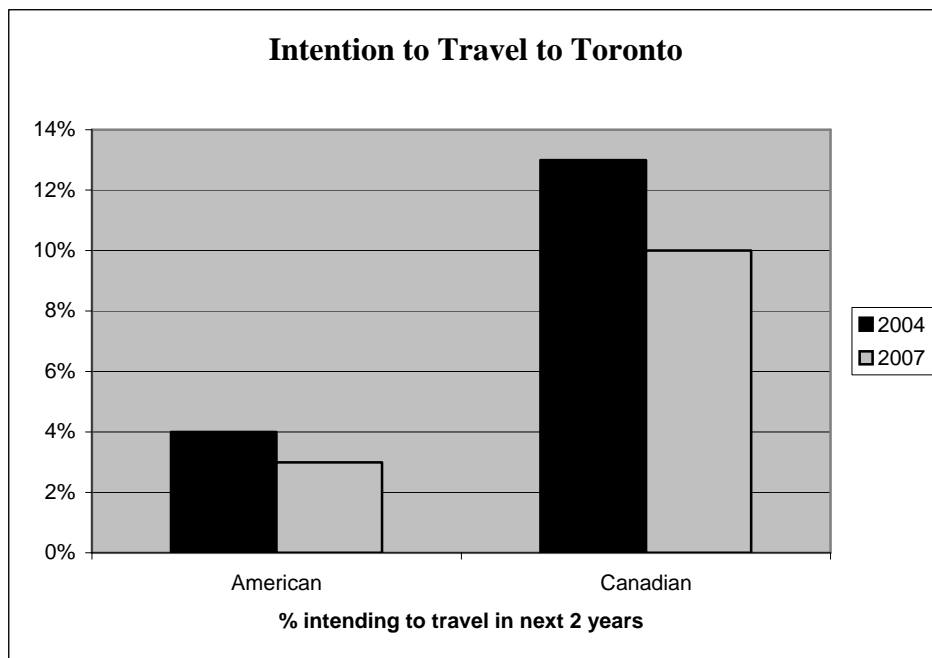
The Ministry of Tourism commissions a large scale survey of people living in the province's main US and Canadian tourism markets each year to determine what percentage of people plan to visit in the next two years. Figure 5 shows that 25% fewer American and 23% fewer Canadian travellers planned to visit Toronto in 2007 than in 2004.

**Figure 4**



**Note:** Data Source for 1998 to 2004 is Statistic's Canada Travel survey and International Travel Survey. 2005 to 2007 are estimates by the City of Toronto based on PRTD survey responses and other forecasts (Conference Board of Canada, Ministry of Tourism, Tourism Toronto).

**Figure 5**



These recent trends in visitation are in part due to macro-economic trends that have nothing to do with Toronto's appeal as a destination. Most notably, there has been a significant decline in overall US travel to Canada that is being driven by the change in exchange rate, the US economy, and increased border security and passport requirements. However, the 23% decrease in Canadian intention to travel to Toronto is not as readily explained by global trends. The PRTD audit revealed a number of weaknesses in Toronto's appeal as a tourist destination some of which are outlined below. It then provides direction as to how these issues can be addressed.

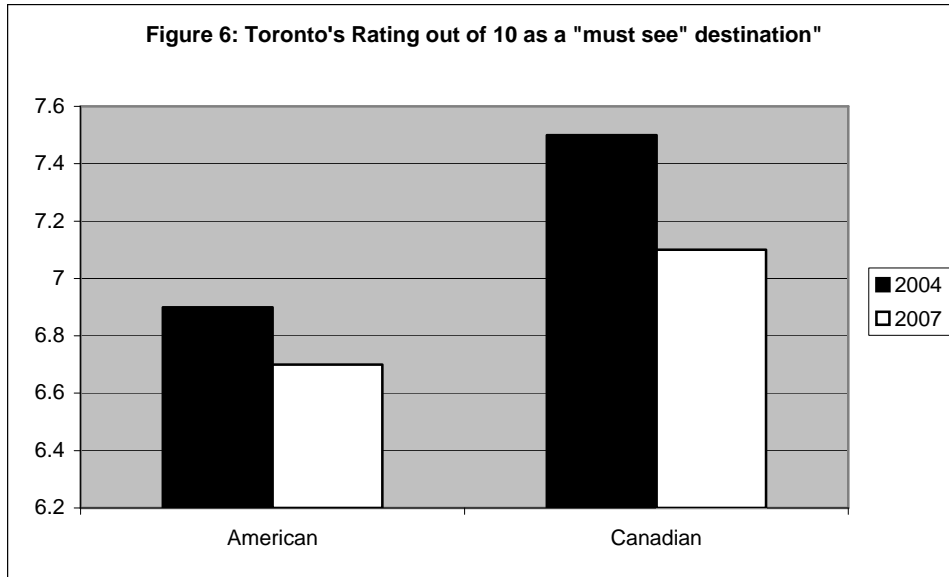
### **Challenges to Achieving Prosperity in Tourism**

#### **1. Visitor Perception of Toronto has changed.**

The Ministry of Tourism travel intentions research cited above asked Americans and Canadians to rate Toronto on a scale from 1 to 10 as a "must see" destination. Figure 6 illustrates that Toronto's scores on this dimension slipped between 2004 and 2007 to the rather mediocre score of 6.7 for Americans and 7.1 for Canadians. The slippage also occurred on many of the ratings for more specific dimensions, such as shopping, restaurants, nightlife, arts, culture, history, strolling around, family vacation (*Table 5.11 of Research Report, p. 112*).

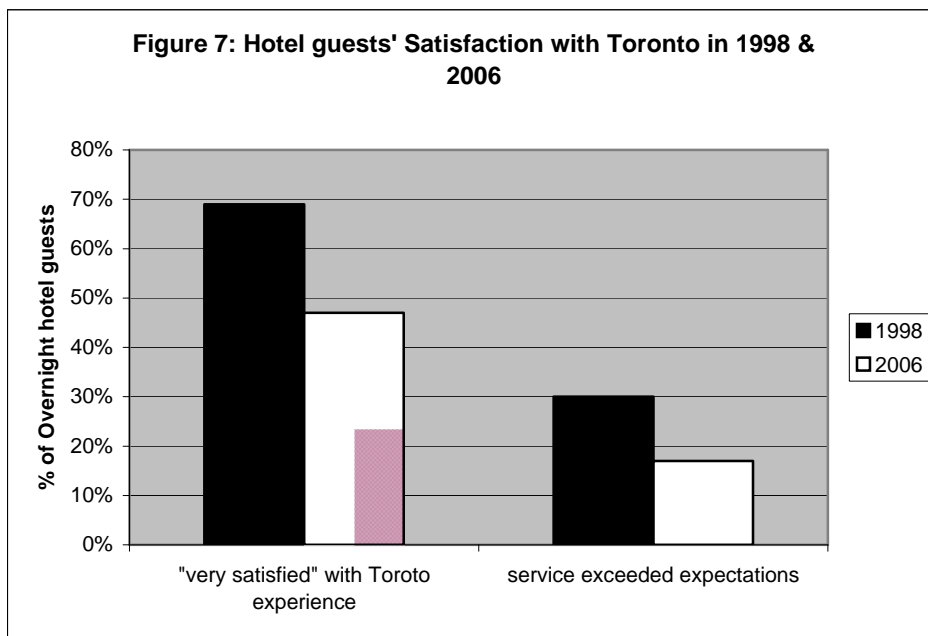
The research revealed that people feel there is nothing new to see and do in Toronto. While many of Toronto's cultural icons have received major investment in recent years, they are not yet attracting significant volumes of tourists since they were recently completed (still under construction in some cases) and have not yet invested in "blockbuster" programming. New festivals and events have been launched (most significantly Nuit Blanche, Luminato and the Zoo's Stingray Exhibition), but will need more time to build profile in tourist audiences. Toronto's newest major mass entertainment experience is The Hockey Hall of Fame, which opened fifteen years ago in 1993.

The study highlights a number of "under developed and under performing assets" which have potential to become significant tourist draws if appropriate investment and tourism development and marketing activities are undertaken.



2. Visitors are demanding service and value for money

The PRTD research revealed that the people who visited Toronto in the last couple of years were less impressed with the city than a decade ago. Figure 7 illustrates some comparative results from two parallel surveys of overnight hotel guests that were undertaken by the University of Guelph for Tourism Toronto in 1998 and 2006.



In 2006, less than half of the respondents said that they were “very satisfied” with their experience in Toronto. Only 17% indicated that the service levels they had encountered exceeded their expectations. The 2006 visitors also indicated lower levels of

“excitement” with Toronto entertainment, cityscape, cultural venues, dining and shopping than in 1998. They expressed the opinion that Toronto did not offer enough “value for money”. This same comment was made by the Canadian respondents to the 2007 Travel Intentions Survey – their perception that the city was expensive was one of the top three issues that made them less inclined to visit Toronto.

Other findings included that visitors find information services and directional signage inadequate. There are gaps in our services for travellers with special needs, most particularly wheel-chair accessibility. Despite being in a multi-cultural city, most tourist sites and services do not offer non-English services or information.

### 3. Toronto’s infrastructure and public realm needs upgrading.

The PRTD audit and stakeholder consultations revealed a high degree of concern over issues related to the public realm and infrastructure (summarized in Section 1.5 of Appendix 1 to the Recommendations report; pp. 51 to 54). The Travel Intentions Research indicated that concerns over personal safety and traffic congestion were deterring some Canadian travellers from visiting Toronto. The perception of safety issues contradicts statistics showing that Toronto continues to be among the safest large cities in North America.

### 4. The need for a common vision for Toronto and a process for managing it.

While there have been many efforts to enhance Toronto’s attractiveness and offer exciting things for both residents and visitors to see and do in recent years, these have tended to be one-off projects. There has been a lack of consensus among tourism industry representatives as to what needs to be addressed. Initiatives have been undertaken in isolation of one another with little opportunity to build cross-sectoral synergy. Often initiatives compete for resources and attention. Often initiatives are undertaken without a tourism perspective. The discussions with industry stakeholders indicated that a new way of doing things was called for – that an industry leadership forum for cross-sectoral destination development discussion and decision-making should be formed, and entrusted with developing a common vision for the Toronto destination.

The industry also needs a process for proactively managing a strong destination on an ongoing basis. Such a process would look to the future to identify gaps in the calendar of major tourism attractors and opportunities to fill them. It would strategize how best to meet emerging challenges and take advantage of new opportunities. It would nurture cooperation and partnerships across the industry. It would become a mechanism to improve industry communications and intelligence, and address emerging issues such as labour force development and shortages.

## 5. Low awareness of the importance of Tourism.

Stakeholders also widely expressed the opinion that the importance of the tourism sector is not recognized.

- Within the public realm, decisions that impact tourism are often made without knowledge or regard for the sector.
- Most businesses in Toronto are highly oriented to serving the local market and give tourism development and marketing lower priority. Therefore, many experiences that could become tourism assets do not address the specific needs of visitors and are not marketed to visitors. The PRTD Audit revealed potential to change this orientation; 92% of businesses saw tourism as a growth component for their business. Yet only 40% currently actively market or participate in tourist-oriented packages and promotions. Two thirds of the businesses that don't currently market to tourists would be interested in exploring these opportunities.
- Front line workers in stores and restaurants, taxi industry, public transit, parking lots, the police and enforcement officers need to become more responsive with visitors who ask questions or make mistakes in negotiating the city. Tourism is important to the community and we must increase our civic predisposition to welcome visitors instead and offer assistance.
- Average citizens also have an important role to play in making visitors feel welcome, and in becoming more active hosts to the seven million people a year who come to Toronto primarily to visit friends and relatives.

### **Making Toronto The Best It Can Be**

The core recommendation emerging from the PRTD process is that a cross-sectoral industry leadership group should create and implement a formal destination development plan for Toronto.

The Plan should be directed to achieving the following:

1. Increase the value proposition that Toronto offers visitors with the goal of exceeding visitors' expectations;
2. Establish an annual tourism business management process; and
3. Increase the awareness of the importance of tourism to Toronto.

The tourism destination development plan should be definitive, have a common vision, and encompass all aspects of Toronto's product, experience and infrastructure. It should become the road map for Toronto's evolution as a tourism destination. It is a specific recommendation of the Agenda for Prosperity and it will work in tandem with the Ministry of Tourism's strategies for the province of a whole. It should engage a multitude of stakeholders directly involved in tourism as well as those who provide

related services. It should establish agreed upon action priorities, which the tourism industry can embrace, and support. The plan should capitalize on work that already is being done, though often currently in isolation from tourism sector stakeholders and without explicit regard for the impact on destination development.

The PRTD process identifies 93 opportunities for action (Appendix 1 to Recommendations Report). It recommends that the first focus be given to the elements that impact the most visitors, and to the planning and leadership processes needed to create and manage a formal destination development plan.

The priority recommendations to increase Toronto's value proposition are:

To excite people to visit:

1. Attract and nurture major events;
2. Attract blockbuster exhibitions;
3. Renew and create "tourist magnets" (opportunities include the Waterfront, Ontario Place revitalization, Exhibition Place, Woodbine Live; a year round mass entertainment complex would have the greatest impact on visitation); and
4. Tell Toronto heritage story in a more compelling way.

To motivate visitors to return:

1. Instil a culture of hospitality excellence throughout the city so that visitors feel welcomed, comfortable and well treated;
2. Nurture a high level of customer service at visitor touch points;
3. Animate the city and create energy and a "buzz" on city streets
4. Improve the city's visual appeal;
5. Increase access to visitor information throughout the city;
6. Improve visitor-oriented wayfinding and directional signage;
7. Reduce traffic congestion and enhance transportation services; and
8. Become more "motor coach friendly"

By addressing these key areas, Toronto will deliver superior value to all those who visit as well as those who call Toronto home.

## **IMPLEMENTATION**

Acting on the PRTD recommendations will require buy-in and participation across the industry as well as the public sector. A new partnership is needed to agree on priorities, determine accountability for action, monitor progress, and respond to new challenges and opportunities on an ongoing basis.

A pre-existing leadership forum that was created by the Ministry of Tourism has agreed to take on responsibility for overseeing the implementation of the PRTD recommendations. This is the "Toronto Destination Development Leadership

Committee”. The Ministry of Tourism established “destination development leadership committees” in its seven largest destinations in 2005. These committees provide forums for information sharing and collective decision-making about how to strengthen each destination. The Toronto Committee is chaired by an Assistant Deputy Minister of Tourism, and includes senior representation from Tourism Toronto, the Greater Toronto Hotel Association, Toronto Board of Trade, Metro Toronto Convention Centre, Ontario Restaurant, Hotel and Motel Association, Attractions Ontario, the Ontario Tourism Marketing Partnership Corporation, and the City of Toronto Economic Development, Culture and Tourism Division. This group strongly supported Toronto undertaking a PRTD project, and provided input throughout the process.

The Toronto Destination Development Leadership Committee has had four half-day discussions about the PRTD recommendations with additional meetings scheduled at six-week intervals in future months. It is apprising itself of the various initiatives already underway which are addressing the recommendations. There are many such initiatives, including:

- Capital improvement plans and renovations at Casa Loma and Fort York;
- Clean and Beautiful City Office and Program;
- Coordinated street furniture program and Info Pillars;
- Exhibition Place Master Plan;
- Fixed Rail transit proposal between the Pearson Airport and Union Station;
- Major Event Attraction Policy and Strategy;
- Metrolinx Regional Transportation Plan, Transit City Plan and MoveOntario 2020;
- Panhandling Pilot Project;
- Tax Increment Equivalent Grant Program;
- Toronto Museum project;
- Union Station Renovation;
- Visitor Information Service pilot programs and business plan (under development);
- War of 1812 Bicentennial Steering Committee and planning process;
- Waterfront development plans; and
- Woodbine Live!

The Leadership Committee is reviewing the status of the various initiatives and considering whether a greater degree of collaboration is needed to ensure that tourism development objectives are achieved. It is determining where new initiatives are required and how they might be mobilized. It is considering the need to broaden its membership to represent a broader cross section of activities impacting Toronto’s destination development. This work will lead to the development of a PRTD implementation plan in the coming months.

The Leadership Committee also has decided to initiate a new program to act on one of the specific PRTD recommendations in 2008. It has started to frame a “*We’ve been Expecting You*” program to instil a culture of hospitality excellence throughout the city. Widespread participation in the program will be sought so that the general public and



front line staff who encounter visitors are better equipped to answer their questions and are predisposed to lend a helping hand. The program concept is being introduced to the industry in May/June, and resources are being assembled to further develop and implement the first phase.

### **Role of the City of Toronto**

The City of Toronto has a significant role to play in strengthening Toronto as a tourism destination. Tourism is among the key sectors supported by the Economic Development, Culture and Tourism's work program. This support should continue, using the PRTD recommendations and future Implementation Plan as a guide to priorities. The role played by the Division includes:

- Tourism strategy, policy and support program development;
- Business liaison and facilitation;
- Sector advocacy and issue resolution;
- In-city visitor information services;
- Investment attraction and facilitation; and
- International event bid strategy and facilitation.

In addition, the Culture and Special Event functions of the Division operate a number of museums, cultural programs and festivals with tourist appeal and potential and facilitate the activities of external cultural program and event organizers.

The work of other divisions within the corporation and its agencies, boards and commissions also impact Toronto's appeal as a tourist destination. Many of the issues raised in the PRTD audit lie within their jurisdiction. It is recommended that EDCT-Tourism lead a discussion process with the relevant City divisions, agencies, boards and commissions to bring the PRTD results and recommendations to their attention and consider the means of addressing the issues and opportunities raised.

The "*We've been expecting you*" program will be an initial focus for discussion. The Leadership Committee hopes that employees of the City and its agencies, boards and commissions who interact with visitors will be active participants in the hospitality excellence program. Members of Council could play an advocacy role and assist in enlisting the support of their constituents.

### **CONCLUSIONS**

The tourism industry recognizes the opportunities and seeks to improve Toronto's reputation as a visitor destination. The Premier Ranked Tourist Destination Project has provided the City and its tourism industry stakeholders with a wealth of information about Toronto's strengths and weaknesses as a tourist destination. Its recommendations chart a course for strengthening the sector in the future. The recommended course of

action has been built into the Agenda for Prosperity. The industry already is engaged in working with the City and the Ministry of Tourism to act on the results. It is recommended that the City of Toronto continue to fully support and participate in the industry's efforts to make Toronto a stronger tourist destination.

## **CONTACT**

Judy Morgan  
Director, Tourism Development  
Tel: (416) 395-0419  
Fax: (416) 395-0278  
Email: [jmorgan1@toronto.ca](mailto:jmorgan1@toronto.ca)

## **SIGNATURE**

Duncan H. Ross  
Executive Director - Tourism

## **ATTACHMENTS**

Attachment No. 1: PRTD Steering Committee members  
Attachment No. 2: Geographical Distribution of PRTD Audit Respondents