

1.0 THE PROJECT

1.1 Project background

The Rideau watershed has long been a favoured destination for Eastern Ontario boaters. The idyllic lakes and historic locks that comprise the Rideau Canal, the opportunity to travel without interruption from Ottawa to Kingston, and the quaint villages and towns situated along the Rideau shoreline have established the Rideau as a boater's paradise.

In addition to boating, the Rideau also offers a variety of water-based and shore-based recreational activities. In the spring, summer and autumn, these activities include fishing, swimming, hiking and camping. During the winter, skating, skiing and snowmobiling are popular, both on the Rideau itself, and on the land that parallels the waterway. Several communities along the Rideau – notably, Merrickville, Westport, Smiths Falls and Perth – also feature architecture, museums, galleries and festivals that lend the Rideau a distinctive cultural flavour. As a National Historic Site constructed in the early 19 century, the Canal itself is a heritage attraction of international renown: the oldest continually operated Canal in North America, a navigable waterway featuring more than 40 hand-operated locks.

At the northern terminus of the Rideau Canal is the City of Ottawa. As the Nation's Capital, Ottawa is home to a range of federal cultural and political institutions, including the National Art Gallery, Rideau Hall, Parliament Hill, and the Supreme Court of Canada. In total, 20 federal institutions or attractions of national significance are located in Ottawa. Additionally, the City of Ottawa boasts a variety of major cultural festivals, along with a rich tapestry of commercial art galleries and heritage experiences.

At the southern terminus of the Rideau Canal, where the Cataraqui River empties into Lake Ontario, is Canada's original capital: the City of Kingston. Historic Fort Henry is located here, along with an array of museums, arts events and festivals set against the backdrop of the "Limestone City" with its built heritage of 18th and 19th century structures.

Taken as a whole, the Rideau Canal, its adjoining towns and villages, the City of Ottawa and the City and Kingston offer a cornucopia of world-class arts and heritage experiences. The fact that the story of the Canal is, in part, the story of the creation of Canada itself, reinforces the significance of the Rideau and the appeal of the destination to culturally oriented travelers.

Although the Rideau watershed defines a discrete region that is ideally suited to being marketed as a cultural destination, historically, such efforts have been modest. The Rideau Heritage Route (RHR), an initiative launched after the Ice Storm of 1998, has been the best attempt to date to capitalize on the Rideau's cultural assets. Unfortunately, the RHR lacked the financial resources to develop and market the destination in domestic and international markets, or a model for ensuring the initiative's long-term sustainability.

In 2004, Parks Canada and the Ministry of Tourism and Recreation for the Province of Ontario determined that, in association with the Ottawa Tourism and Convention Authority and other tourism stakeholders throughout the Rideau region, an initiative would be launched to capitalize fully on the region's cultural tourism assets. Thus, the Rideau Cultural Heritage Corridor was born.

1.2 Project definition

The Rideau Cultural Heritage Corridor is an initiative to develop, package, and market the cultural tourism experiences located along the Rideau Canal, from Ottawa to Kingston, inclusive. These experiences will be branded and marketed as a single tourism product, in a campaign to be launched for 2006/2007. The Corridor initiative is part of a larger Parks Canada strategy that includes an anticipated UNESCO World Heritage Designation to coincide with the 175th anniversary of the completion of the Canal, which occurs in 2007.

1.3 Project objective

The objective of the Rideau Cultural Heritage Corridor is to position Ottawa, Kingston, and the entire Rideau region as a cultural destination by promoting the region's authentic, market-ready arts, heritage, cuisine, agri-tourism and natural history experiences. Through this activity, the Corridor will help to diversify the Rideau's tourism industry, grow its short and long-haul markets, and increase visitor volume and revenues for Corridor suppliers and their communities.

1.4 Project terms

Cultural tourism means travel that is motivated wholly or in part by an interest in:

1. **Human heritage** (i.e., museums, historic sites, architecture, heritage festivals, cultural and historic districts, ethnically distinctive neighbourhoods, aboriginal heritage experiences, miscellaneous heritage attractions)
2. **The arts** (i.e., performing arts events and festivals, visual arts events and festivals, literary arts events and festivals, media arts events and festivals, multi-disciplinary arts festivals, public art, public art galleries, commercial art galleries, artist and artisan studios)
3. **Cuisine** (i.e., dining, food and beverage festivals and events)
4. **Agricultural and industrial heritage** (i.e., open farms and orchards, farmer's markets, agricultural festivals, food processors, factory tours)
5. **Natural history** (i.e., natural history phenomena, natural history museums, nature interpretation centres, nature trails, indigenous flora and fauna, decorative gardens, scenic landscapes and vistas)

Cultural tourists are individuals whose travel is motivated wholly, or in part, by an interest in cultural tourism, and who consume cultural tourism experiences on trips taken, whether for business or pleasure, having a minimum one-way distance of 80 kilometers.¹

Market ready means that the quality of a cultural tourism experience is such that, when clustered with other products within the Rideau Corridor, the aggregate can be marketed as a lure in the Rideau's tourism markets. The term "market-ready" implies that the cultural products or experiences are produced by institutions, businesses, or individuals whose primary income is derived from the sale of said products or experiences. The Rideau Cultural Heritage Corridor is not intended to market amateur or recreational cultural activity.

Authentic means that the cultural tourism experiences marketed through the Corridor: (a) are produced, wherever possible, in the Rideau region, (b) do not compromise the integrity of the cultural experience in order to appeal to a mass market, (c) do not misrepresent historical fact, and (d) in the case of heritage artifacts, are clearly labeled as reproductions, if reproduced.

¹ It is recognized that a significant market for the Rideau Corridor is the resident market. Strictly speaking, residents who travel less than 80 km. are not defined as "cultural tourists".

2.0 CULTURAL TOURISM

2.1 A growing market segment

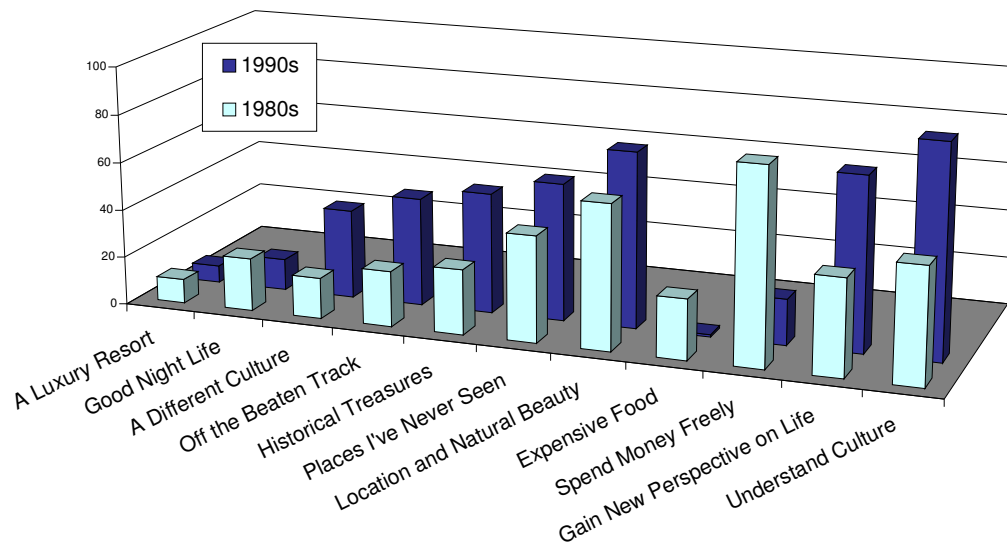
Cultural tourism is a fast-growing and lucrative segment of the global travel market. In North America, its growth is linked to a variety of factors. Foremost among these factors is the growth of affluent, well-educated baby boomers in the travel population (educational attainment is positively correlated with an interest in culture), and, as a corollary to the above, a growth in demand for experiential and learning-based travel.

Travel and Leisure magazine first popularized evidence of the growth in demand for cultural tourism products. In 1982, and again in 1992, the magazine commissioned the Lou Harris polling company to survey the travel behaviours of frequent adult American travelers. Interviews of 801 individuals were conducted by telephone. Issues included means, destinations, types of pleasure travel, vacation options, and the perceptions, knowledge, and motivations of frequent travelers.

The bar graph (below) presents the findings of the Lou Harris research with respect to travel motivations. Of the 11 travel motivators tested in the research, the 7 motivators that tested the respondent's interest in culturally enriching travel showed significant growth between 1982 and 1992.

LOU HARRIS POLL FOR TRAVEL & LEISURE MAGAZINE

What is very important when planning your trip?



Source: Lou Harris and Associates, 1992.

Lou Harris interpreted the data illustrated above as representing a “paradigm shift” away from escapism (which Harris characterized as the travel motivator of the 1980's) toward enrichment (which Harris characterized as the travel motivator of the 1990's and beyond).

2.2 Factors influencing the growth of cultural tourism

A detailed analysis of the factors that are positively impacting the demand for cultural tourism products is found in the article, "Tourism Trends for the 1990's", written by Kathleen Brown. The following text is excerpted from Ms. Brown's article:

Rising Education Levels: The single most significant factor that influences cultural participation, environmental concern, affluence - and travel.

Increasing Age: Many baby-boomers are in their mid-forties. Participation in cultural and heritage activities increases through middle age, peaks between forty-five and sixty-five, and subsequently falls off. This group also has more available time than they had previously, and those with older children choose to expose them to enriching educational experiences. They are at the peaks of their careers and possess the highest earning power of their lives, resulting in the highest level of discretionary income. In twenty-five years, 54 percent of the population of the United States will be over the age of fifty. The median age will be 54 compared to forty today.

Increasing Economic Role of Women: More women are working, earning more money, and controlling more discretionary income. Women typically make the decisions regarding the educational experiences of their children and set vacation plans. They also account for a large majority of bus tour passengers, trip planners, and elementary school teachers who make decisions on field-trip destinations for their students. Women account for 60 to 65 percent of museum attendance and are more likely to support and participate in heritage and cultural activities. As more women move into positions of power and influence, funding and policies for these interests will tend to be more supportive. These demographic trends suggest that tourism will have the largest, wealthiest, and best-educated market for the next twenty years.

Less Leisure Time: A Lou Harris study, "*Americans and the Arts*", reported that leisure time in the United States dropped from just over 26.2 hours per week in 1963 to 16.2 hours per week in 1989. This implies that greater emphasis will be placed on shorter trips, mini-vacations and weekend escapes, as opposed to the longer vacations of the past. People may be inclined to maximize their vacation experiences by visiting historical sites more often during these kinds of trips than they would during their usual hectic home routines.

Importance of Quality: Spending "quality time" requires quality space. Increasingly sophisticated consumers will require increasingly sophisticated tourism infrastructure, such as good roads, hotels, and other necessary amenities.

Changing Leisure Patterns: With all of the publicity about exposure to ultra-violet radiation and ozone depletion, visitors may not want to spend all of their vacation on the beach or outdoors. Activities are likely to include indoor pursuits, such as those afforded by historic homes and reconstructed sites.

Advances in Global Communications: The age of information has brought about an increasing awareness of social issues. Visitors will be better informed and more demanding of accountability.

Increasing Importance of International Tourism: The rise of international tourism represents a tremendous opportunity to access and affluent, educated, sophisticated consumer.

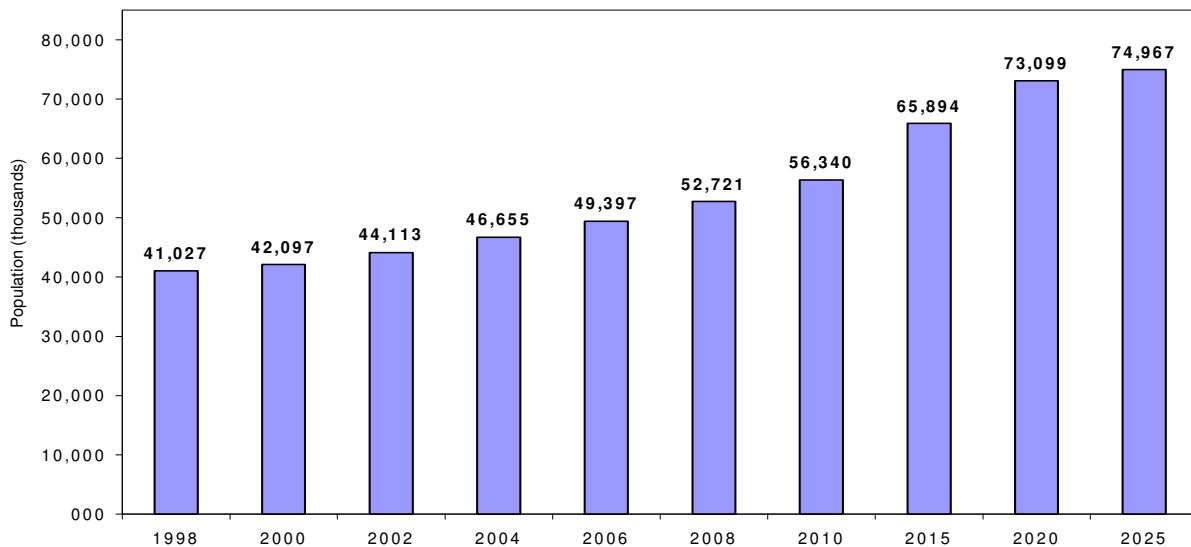
Proliferation of Travel Options: Competition will be keen for resort states such as Florida to retain its tourist market. Caribbean basin countries are establishing significant tourism programs capitalizing on their natural and cultural attributes and are promoting them effectively.

The Global Economy: With the rising importance of international tourism, historical attractions have become part of the world economy. Economic variability will be diffused somewhat because weak and strong economies co-exist throughout the world. ... By attracting an international market, historical attractions can broaden their bases of support and benefit from a range of world currencies.

2.3 The future of cultural tourism

Today, there are 46 million Americans between the ages of 55 and 74. By the year 2025 - due to the aging baby boom - there will be 75 million Americans between the ages of 55 and 74. The additional 29 million Americans in the 55-to-74 age cohort by the year 2025 will be *60 percent above current values*.

U.S. POPULATION DISTRIBUTION 55 - 74 AGE COHORT, 1998 to 2025



In Canada, where the size of the baby boom is proportionately largely than in the U.S., there are approximately 6 million Canadian in the 55-to-74 age cohort. By the year 2025, there will be 10 million Canadians in the same age cohort – an increase of 66 percent.

When the U.S. and Canadian statistics are combined, there will be a total of 33 million more North Americans in the 55-to-74 cohort by 2025 than is the case today. In total, by 2025, there will be 85 million North Americans in the 55-to-74 cohort – the entire, retired, North American baby boom. Possessing health, leisure time, and the financial resources to enjoy both, boomers are expected to travel widely, further driving the market demand for cultural tourism experiences.

3.0 CULTURAL TOURISTS

3.1 A demographic profile

Research that profiles the cultural tourist is extensive. Although present in all age and income cohorts, the typical cultural tourist is a well-educated, affluent baby boomer. Overall, when compared with other leisure travelers, cultural tourists earn more, spend more, stay longer in the communities they visit, and are more likely to choose commercial accommodation than to stay with family and friends.

The following table contains data from the Travel Industry Association of America and references domestic travel by Americans. However, it is reasonable to assume that comparable statistics were they available, would apply to domestic travel by Canadians.

CULTURAL TOURISTS: A DEMOGRAPHIC PROFILE

-
- Have higher education levels (41% university graduates vs. 32% among other travelers)
 - Spend more money (U.S. \$615 per trip vs. U.S. \$425)
 - Take longer trips (4.7 nights vs. 3.3 nights)
 - Prefer hotels, motels, or B&B's (56% vs. 42%)
 - Shop more (45% vs. 36%)
 - Tend to be baby boomers and "matures" (i.e., the 55-to-74 market)
 - Have managerial or professional occupations (31% vs. 24%)
 - Tend to be pleasure travelers
-

Source: Travel Industry Association of American. TravelScope Survey. 1998. National Travel Survey. Aug. 1998, Jan., 2001.

3.2 Cultural cohorts

The term "cultural tourist", as used above, denotes travelers who are broadly interested in heritage, the arts, and cuisine experiences while traveling. However, within this broad definition, different cultural tourists exhibit different cultural preferences. The *Travel Activities and Motivation Survey* (TAMS), an extensive study of the travel behaviours of North Americans that was released by the Canadian Tourism Commission in 2001, segregates the cultural tourist into four "cultural cohorts":

- Heritage Tourism Enthusiasts
- Visual Arts Tourism Enthusiasts
- Wine and Culinary Tourism Enthusiasts
- Performing Arts Tourism Enthusiasts

Each cultural cohort exhibits distinct demographic features and distinct travel behaviours, as detailed below.

3.2.1 Heritage tourism enthusiasts

According to the TAMS research, heritage tourism enthusiasts are travelers who, during the past two years, engaged in a minimum of any four of the following: a museum visit, a visit to an historic site, a heritage celebration, a local festival or fair, a French Canadian cultural experience, an aboriginal cultural experience, a visit to a farmers' market, a U-pick operation or other agri-tourism attraction. Heritage tourism enthusiasts represent the largest of the four "cultural cohorts" cited above, with a combined Canadian and U.S. market of 10.5 million travelers (2.2 million in Canada, 8.3 million in the U.S.).

It should be noted that, although their primary interest is heritage, heritage tourism enthusiasts exhibit significant crossover participation in other cultural activities. Among Canadian heritage tourism enthusiasts:

- 40 percent are also visual arts enthusiasts
- 25 percent are also performing arts enthusiasts
- 48 percent enjoy wilderness hiking and backpacking

Among U.S. heritage tourism enthusiasts who travel to Canada:

- 50 percent are also visual arts enthusiasts
- 30 percent are also performing arts enthusiasts
- 33 percent enjoy wine and culinary activities
- 33 percent enjoy nature-based tourism activities

A comparison of the demographics of Canadian and U.S. heritage tourism enthusiasts reveals a similar profile, except for the household income of U.S. heritage tourism enthusiasts, which is significantly higher.

HERITAGE TOURISM ENTHUSIASTS: A PROFILE

Canadian heritage travelers in Canada	U.S. heritage travelers to Canada
<ul style="list-style-type: none">• 45 average age• 28 percent university graduates• \$60,000 average household income• 66 percent travel without children	<ul style="list-style-type: none">• 49 average age• 34 percent university graduates• \$71,100 (US\$) average household income• 70 percent travel without children

Note: In each category of demographic data shown above, except the percentage of U.S. travelers to Canada who travel without children, figures and percentages cited exceed those among other leisure travelers.

3.2.2 Visual arts tourism enthusiasts

In the TAMS data set, visual arts enthusiasts are defined as individuals who, during the past two years, engaged in a minimum of any two of the following: a visit to an art gallery, a visit to an art and craft studio, attendance at an international film festival. Visual arts tourism enthusiasts represent the second largest of the four “cultural cohorts”, with a combined total market of 8.7 million travelers (1.7 million in Canada, 7 million in the U.S.).

As with heritage tourism enthusiasts, visual arts tourism enthusiasts exhibit considerable crossover participation in other cultural activities. Among Canadian visual arts tourism enthusiasts:

- 50 percent are also heritage tourism enthusiasts
- 40 percent are also performing arts tourism enthusiasts
- 38 percent are also nature-based tourism enthusiasts

Among U.S. visual art travelers to Canada, crossover participation largely mirrors that of Canadian visual arts tourism enthusiasts. 38 percent of U.S. visual art travelers to Canada are also wine and culinary tourism enthusiasts.

In general terms, the demographic profile of Canadian visual arts tourism enthusiasts does not differ radically from Canadian heritage tourism enthusiasts. The average age of Canadian visual arts enthusiasts is slightly younger (43.3 years), while the average income is somewhat higher (\$63,100). Average education is also higher for Canadian visual arts enthusiasts (36 percent university graduates vs. 28 percent), while 74 percent of Canadian visual arts enthusiasts travel without children, vs. 66 percent among Canadian heritage tourism enthusiasts.

When the demographics of U.S. visual arts tourist to Canada are compared with the demographics of U.S. heritage travelers to Canada, the profiles are similar except for education. 41 percent of U.S. visual arts travelers to Canada possess a university degree, compared with 34 percent of U.S. heritage travelers to Canada.

VISUAL ARTS TOURISM ENTHUSIASTS: A PROFILE

Canadian visual arts travelers in Canada	U.S. visual arts travelers to Canada
<ul style="list-style-type: none">▪ 43.3 average age▪ 36 percent university graduates▪ \$63,100 average household income▪ 74 percent travel without children	<ul style="list-style-type: none">▪ 47.4 average age▪ 41 percent university graduates▪ \$72,500 (US\$) average household income▪ 75 percent travel without children

Note: In each category of demographic data shown above, except the age of Canadians traveling in Canada, figures and percentages cited exceed those among other leisure travelers.

3.2.3 Wine and culinary tourism enthusiasts

In the TAMs data set, wine and culinary tourism enthusiasts are defined as travelers who, during the past two years, engaged in at least one of the following: stayed at a cooking school, stayed at a wine tasting school, stayed at a gourmet restaurant with accommodation on the premises, or, during the past two years, engaged in a minimum of any two of the following: dined at an internationally acclaimed restaurant, toured a region's wineries, traveled to wineries for day visits. Wine and culinary tourism enthusiasts represent the third largest of the four cultural cohorts, with a total market of 7 million travelers (1.5 million Canadians, and 5.5 million Americans).

Wine and culinary tourism enthusiasts participate in other cultural activities, although to a lesser extent than do other cohorts. Among Canadian wine and culinary tourism enthusiasts:

- 39 percent are also nature-based tourism enthusiasts
- 32 percent are also heritage tourism enthusiasts
- 30 percent are also visual arts tourism enthusiasts
- 20 percent are also performing arts tourism enthusiasts

Among U.S. wine and culinary travelers to Canada, crossover participation rates are higher than among Canadian wine and culinary tourism enthusiasts:

- 50 percent are also heritage tourism enthusiasts
- 41 percent are also visual arts tourism enthusiasts
- 30 percent are also nature-based tourism enthusiasts
- 26 percent are also performing arts enthusiasts

The demographic profile of Canadian wine and culinary tourism enthusiasts closely mirrors that of Canadian visual arts tourism enthusiasts. The one demographic anomaly is education. Among Canadian wine and culinary tourism enthusiasts, 27 percent possess a university degree, compared with 36 percent of Canadian visual arts enthusiasts.

Among U.S. wine and culinary travelers to Canada, the demographic profile resembles that of U.S. visual arts travelers to Canada, although U.S. wine and culinary travelers to Canada possess a slightly higher level of education and household income.

WINE AND CULINARY TOURISM ENTHUSIASTS: A PROFILE

Canadian wine & culinary travelers in Canada	U.S. wine & culinary travelers to Canada
<ul style="list-style-type: none">▪ 46.5 average age▪ 27 percent university graduates▪ \$65,500 average household income▪ 76 percent travel without children	<ul style="list-style-type: none">▪ 48.2 average age▪ 37 percent university graduates▪ \$76,600 (US\$) average household income▪ 78 percent travel without children

Note: In each category of demographic data shown above, figures and percentages cited exceed those among other leisure travelers.

3.2.4 Performing arts tourism enthusiasts

In the TAMS data set, performing arts tourism enthusiasts are defined as travelers who, during the past two years, engaged in at least three of the following: a theatre performance, a classical music concert, a jazz concert, a music festival, a theatre festival, a ballet, an opera, a literary festival or event. Performing arts tourism enthusiasts represent the fourth largest of the four “cultural cohorts”, with a combined market of 4.9 million travelers (1.1 million Canadians, 3.9 million Americans).

As with other cultural cohorts, performing arts enthusiasts exhibit considerable crossover participation in other cultural activities. Among Canadian performing arts tourism enthusiasts:

- 66 percent are also visual art tourism enthusiasts
- 53 percent are also heritage tourism enthusiasts
- 25 percent are also wine and culinary tourism enthusiasts
- 35 percent are also nature-based tourism enthusiasts

Among U.S. performing arts travelers to Canada, crossover participation is even more pronounced than among Canadian performing arts tourism enthusiasts for all activities except those that are nature-based. In other words, U.S. performing arts travelers to Canada are particularly interested in other cultural activities.

The demographic profile of Canadian performing arts tourism enthusiasts is scarcely distinguishable from that of Canadian visual arts tourism enthusiasts. Average household income among Canadian performing arts enthusiasts is slightly lower than among Canadian visual arts enthusiasts (\$56,000 vs. \$63,100), otherwise, the demographic profile is virtually identical.

Among U.S. performing arts travelers to Canada, there is no significant difference with the demographic profile for U.S. visual arts travelers to Canada.

PERFORMING ARTS TOURISM ENTHUSIASTS: A PROFILE

Canadian performing arts travelers in Canada	U.S. performing arts travelers to Canada
<ul style="list-style-type: none">▪ 43 average age▪ 36 percent university graduates▪ \$56,000 average household income▪ 77 percent travel without children	<ul style="list-style-type: none">▪ 49 average age▪ 41 percent university graduates▪ \$71,900 (US\$) average household income▪ 78 percent travel without children

Note: In each category of demographic data shown above, except the age of Canadians traveling in Canada, figures and percentages cited exceed those among other leisure travelers.

3.3 Market size of the cultural cohorts to 2025

The aging of the North American population has specific implications for the future market size of each of the four cultural cohorts cited above. The *Travel Activities and Motivation Survey (TAMS)* uses population projections to estimate the market size of each cohort until 2025, for both Canadians and U.S. travelers to Canada.

In Canada, the projected adult population in 2025 is 29.6 million, representing a 27 percent growth rate when compared with the Canadian adult population of 2000.

Currently, each of the four cultural cohorts is growing at a rate that exceeds the rate of growth in the Canadian population. By 2025, performing arts enthusiasts will have grown in number by 44 percent to 1.5 million, followed by visual arts enthusiasts (39 percent, to 2.4 million), heritage tourism enthusiasts (37 percent, to 3 million), and wine and culinary enthusiasts (36 percent, to 2 million).

THE FOUR CULTURAL COHORTS (CANADA) - PROJECTED SIZE TO 2025

	2000 size	2025 size	Growth rate
Canadian adult population	23.3 million	29.6 million	27%
Canadian heritage enthusiasts	2.2 million	3 million	37%
Canadian visual arts enthusiasts	1.7 million	2.4 million	39%
Canadian wine and culinary enthusiasts	1.5 million	2 million	36%
Canadian performing arts enthusiasts	1.1 million	1.5 million	44%

In the U.S., the projected adult population in 2026 is 254.3 million, representing a 27 percent growth rate compared with the U.S. adult population of 2000.

As in Canada, each of the four cultural cohorts in the U.S. is growing at a rate that exceeds the rate of growth in the U.S. population. By 2026, heritage tourism enthusiasts will have grown in number by 47 percent to 12.3 million, followed by wine and culinary enthusiasts (35 percent, to 7.5 million), performing arts enthusiasts (35 percent, to 7.5 million), and visual arts enthusiasts (31 percent, to 9.2 million).

THE FOUR CULTURAL COHORTS (U.S.) - PROJECTED SIZE TO 2025

	2000 size	2025 size	Growth rate
U.S. adult population	200.4 million	254.3 million	27%
U.S. heritage enthusiasts	8.3 million	12.3 million	47%
U.S. visual arts enthusiasts	7 million	9.2 million	31%
U.S. wine and culinary enthusiasts	5.5 million	7.5 million	35%
U.S. performing arts enthusiasts	3.8 million	5.1 million	35%

4.0 THE RIDEAU CULTURAL HERITAGE CORRIDOR

4.1 The jurisdiction of the Corridor

The jurisdiction of the Rideau Cultural Heritage Corridor is defined by a series of political jurisdictions and roadways that broadly circumscribe the territory that has historically been associated with the Rideau Canal. These political jurisdictions and roadways are:

On the eastern boundary of the Corridor, heading south from Ottawa:

- St. Laurent Blvd. to Russell Road
- Russell Road to Hunt Club Road
- Hunt Club Road to Highway 25
- Highway 25 to the French Settlement Road at Reids Mills
- The French Settlement Road at Reids Mills to County Road 43 at Kemptville
- County Road 43 at Kemptville to County Road 16 at Merrickville
- County Road 16 from Merrickville to Newbliss
- County Road 29 from Newbliss to Toledo
- County Road 8 from Toledo to Phillipsville
- County Road 42 from Phillipsville to the intersection of County Road 33
- County Road 33 to the intersection of Highway 15
- Highway 15 to the Joyceville Road
- The Joyceville Road to the MacLachlan Woodworking Museum (on County Road 2, at Lake Ontario)

On the western boundary of the Corridor, heading south from Ottawa:

- The Ottawa River Parkway to Highway 417
- Highway 417 to Highway 7
- Highway 7 to the intersection of County Road 3
- County Road 3 to Dwyer Hill
- County Road 10 from Dwyer Hill to Perth, to Westport, to Unity Road (above Highway 401)
- Unity Road to Collins Bay Road
- Collins Bay Road to County Road 33
- County Road 33 to Fairfield House, on Lake Ontario

Additionally, the Museum of Civilization, in Hull, is also included in the Corridor.

The Corridor's length is 202 kilometers, stretching from Rideau Canal's origin on the Ottawa River to its terminus at Lake Ontario. The width of the Corridor varies along its length, from approximately 15 kilometers to 25 kilometers.

4.2 Traversing the Corridor

4.2.1 Road

Heading north from Kingston, the principal road route for exploring the Rideau Corridor from Kingston to Ottawa begins with Highway 15, a secondary highway that intersects Highway 401 and runs north to Smiths Falls. From Smiths Falls, this route heads east on County Road 43 to Merrickville, then north following the west shore of the Rideau River to Ottawa (via County Roads 2, 13, and 73). From Smiths Falls, a second "loop route" is available for touring the western periphery of the Corridor. This route entails: (a) taking County Road 43 west from Smiths Falls to Perth, (b) taking County Road 10 south from Perth to Westport, and (c) taking County Road 42 east from Westport to Highway 15, south of Smiths Falls.

Although there are a variety of other roads that link Corridor communities, (notably, Highway 416 linking Ottawa to Kemptville), the two routes indicated above are the primary routes for exploring the Corridor.

Two major highways link the Corridor with major markets. Highway 401 passes immediately north of Kingston and connects that city to both Toronto and Montreal. Each city is approximately 250 kilometers from Kingston. Additionally, Highways 40 and 417 (which form a single highway) link Ottawa and Montreal, a distance of approximately 190 kilometers. U.S. border crossings at Ogdensburg and Cornwall are located off Highway 401, east of Kingston.

4.2.2 Rail

VIA Rail operates passenger train service from Ottawa to Kingston, with between three and five departures daily, depending on the day. Some of these departures, but not all, stop in Smiths Falls, making possible a one-day visit to that community and/or Merrickville, returning to the city of origin on the same day. The travel time by VIA from Ottawa to Kingston, or from Kingston to Ottawa, is approximately 2 hours. VIA Rail also provides service from Ottawa to Montreal, and from Kingston to Toronto.

4.2.3 Water

Traversing the Corridor by water is accomplished via the Rideau Canal, with entrance and egress via the Ottawa River (in Ottawa) and Lake Ontario (at Kingston). The entire journey can be completed in as short a period of time as three days, or may take a week or more, depending on how often the boater wishes to take shore excursions.

For visitors who arrive without their own watercraft, a variety of boat rental companies located along the Canal offer cruisers, canoes, kayaks and houseboats. Additionally, the Kawartha Voyager offers a complete, 5-day Rideau Canal cruise, with return coach transportation to either Kingston or Ottawa.

4.2.4 Bus

Greyhound Canada offers daily departures from Ottawa to Kingston, and from Kingston to Ottawa, with stops in Elgin, Portland, and Smiths Falls. Daily departures are also available between Ottawa and Perth. Bus travel between Ottawa and Kemptville is available on Fridays and Sundays only.

4.2.5 Air

Ottawa International Airport is serviced by 16 passenger airlines offering direct service to Canadian cities, including Halifax, Hamilton, Montreal, Quebec City, Toronto, Regina, Winnipeg, Saskatoon, Edmonton, Calgary and Vancouver. American destinations include Philadelphia, Pittsburgh, Washington, Boston, Chicago, Detroit and Atlanta. International destinations are Glasgow and London.

Norman Rogers Airport, located in Kingston, is serviced by Air Canada. It offers five daily flights to Toronto. Additionally, the Smiths Falls/Montague Airport, in Smiths Falls, services small, private aircraft. Floatplanes also offer access to the Rideau.

4.3 Segmenting the Corridor

Given the size of the Corridor and the demarcating effects of its transportation routes, the Rideau Cultural Heritage Corridor is best segmented into sub-regions. This segmenting will facilitate the profiling of each sub-region in Corridor marketing vehicles, and assist visitor exploration of the region.

Based upon the geographic and cultural characteristics of each sub-region, the demarcating effect of the Valley's transportation routes, and the strategic requirement to circulate visitor traffic throughout the entire Corridor, the following three sub-regions have been defined:

- Greater Ottawa, as far south as Munster and Manotick, including the Long Island lock station on the Rideau Canal
- Greater Kingston, as far east as the MacLachlan Woodworking Museum, as far west at Fairfield House, as far north as the Kingston Mills lock station on the Rideau Canal
- The Rideau Valley / Rideau Lakes region, including Perth, Westport, Smiths Falls, Merrickville, and Kemptville

4.4 The Corridor's cultural products

The Rideau Cultural Heritage Corridor consists of five product clusters: the arts, human heritage, industrial and agricultural heritage, natural history, and cuisine. The characteristics of each of these product clusters within the Corridor, along with representative examples of each product cluster, are broadly profiled below. (Note: The product analysis below does not include Rideau 175 anniversary celebrations, which can be inventoried and added to the product mix for the 2007 marketing campaign.)

4.4.1 The arts

The Rideau Cultural Heritage Corridor boasts a wide array of arts experiences, including Canada's national arts institutions (in Ottawa), several major arts festivals in both Ottawa and Kingston, and a variety of commercial art galleries and artist studios situated throughout the Corridor, the latter being highly represented in the Rideau Valley/Rideau Lakes sub-region.

Overall, the visual arts (i.e., visual art galleries, visual arts festivals, artist studios and studio tours) represent the single largest product grouping in the Corridor (excluding restaurants). More than 50 individual visual arts experiences are available from Ottawa, to Merrickville, to Kingston. Chief among these are the National Arts Gallery of Canada (in Ottawa), the Agnes Etherington Art Centre (in Kingston), more than a dozen commercial art galleries (mostly situated in Ottawa), an equal number of artist studios (mostly situated in Merrickville), and seven studio tours, including the renowned Perth Autumn Studio Tour.

The performing arts represent the second largest product grouping within the Corridor. More than 35 festivals, performing arts producers, or performing arts presenters are located from Ottawa to Kingston. Foremost among these are the National Arts Centre (home to English and French language theatre companies, and to the National Arts Centre Orchestra), the Ottawa Chamber Music Festival, the Ottawa Animation Festival, the Cisco Systems Bluesfest, the Ottawa Jazz Festival, and the Buskers Rendezvous and Limestone City Blues Festival (in Kingston). The Stewart Park Festival (in Perth), is also a performing arts festival of note.

4.4.2 Human heritage

The human heritage assets of the Corridor effectively tell the cultural history of the Rideau region, and indeed, Canada's history as well.

Human heritage assets with the Corridor's jurisdiction include Parliament Hill, Rideau Hall, Library and Archives Canada, the Supreme Court of Canada, the Museum of Civilization and the War Museum (in Ottawa), and Fort Henry, Murney Tower, and Bellevue House (in Kingston). Community museums, community festivals, and other human heritage attractions are found in Perth, Westport, Smiths Falls and other towns and villages, while the Rideau Canal itself traverses the entire Corridor. Additionally, the opening of the new Portrait Gallery of Canada, scheduled for 2007, will enhance significantly the human heritage experience of the Rideau.

Excluding community festivals, the Corridor's heritage experiences number more than 35. This figure increases to more than 55 if each lock station on the Rideau Canal is counted as a separate experience.

4.4.3 Agricultural and industrial heritage

The agricultural heritage assets of the Corridor range from the Canada Agricultural Museum and the ByWard Market (in the centre of Ottawa), to Saunders Farm (in Munster), Valleyview Little Animal Farm (in Nepean), and farmers' markets in Perth and Kingston. In total, the Corridor features 9 agricultural heritage assets.

Industrial heritage assets range from the Canadian Aviation Museum and the Canada Science and Technology Museum (in Ottawa), to the MacLachlan Woodworking Museum, Pumphouse Museum, and Marine Museum (in Kingston), to the Railway Museum and Hershey Chocolate Shoppe (in Smiths Falls). The Old Stone Mill (in Delta) and the Silver Queen Mica Mine (in Murphy's Point Provincial Park) are also industrial assets of note. In total, the Corridor features 9 industrial heritage assets.

4.4.4 Natural history

Natural history assets located within the Corridor's jurisdiction include the Museum of Nature (in Ottawa), the Biodiversity Museum (in Kemptville), Murphy's Point Provincial Park, and a variety of conservation areas disbursed throughout the Rideau Valley/Rideau Lakes region. Additionally, each of the Rideau Canal lock stations offers a natural history experience. If all the lock stations are counted as natural history experiences, more than 30 such experiences can be enjoyed throughout the Corridor.

It should be noted that, although Ottawa possesses a variety of expansive parklands and green spaces, we have not included these in our inventory of natural history experiences. In our view, profiling these assets in the Corridor marketing campaign would provide good reason for Ottawa-based travelers to remain in the City of Ottawa, rather than leave the city and travel south along the Rideau to enjoy nature-based experiences.

4.4.5 Cuisine

As would be anticipated, the cuisine experiences of the Rideau Cultural Heritage Corridor are concentrated within Ottawa and Kingston. However, experiences also available in Merrickville, Perth, Westport, Smiths Falls, and Kemptville.

At present, the database inventory of cuisine experiences includes 78 Ottawa restaurants. Each of the 78 Ottawa restaurants was entered into the Corridor database based upon its inclusion in various Ottawa restaurant guides. Inasmuch as we have not found comparable guides to restaurants elsewhere in the Corridor, it will be necessary to determine what additional restaurants should be included in the Corridor through consultation with a knowledgeable restaurant observer in the region. These restaurants, once identified, will be added to the database.

4.5 Accommodation

The inventory of accommodation properties suitable for the Corridor traveler includes 39 hotels listed in the Canadian Automobile *Tourbook 2003*, with a 3, 4, or 5-diamond rating. Another 100 properties (16 inns, and 84 B&B's) are also identified in the Corridor database. However, the absence of a rating system for inns and B&B's will require consultation with a knowledgeable observer in the region to determine which of these 100 properties are, in fact, suitable for the Corridor traveler. Properties deemed unsuitable for the Corridor traveler will be removed from the database. Other properties not yet identified but deemed suitable will be added to the database.

4.6 The Rideau's cultural typology

The Rideau's cultural typology is a description of the "cultural character" of the Rideau Cultural Heritage Corridor. Through reviewing the inventory of cultural tourism experiences found within the jurisdiction of the Rideau Cultural Heritage Corridor (as described above), and through our research of the history and culture of the region, we define the typology of the Rideau Cultural Heritage Corridor as follows:

The cultural typology of the Rideau is distinguished primarily by its human heritage assets. These assets include the historic city of Kingston (Canada's original capital, home to Fort Henry and other defensive fortifications, along with notable heritage architecture, museums, and historic homes), the Rideau Canal itself (a marvel of 19th Century British military engineering) and Ottawa's national cultural institutions (from the Museum of Civilization, to the Museum of Nature, to the visitor experience of Parliament Hill).

Complementing the region's heritage assets is a lively artistic environment, whose anchor attractions (principally the visual arts, music events and festivals, and live theatre) are concentrated in Ottawa and Kingston, as well as in several rural communities, especially Merrickville and Perth.

Together, the heritage and arts assets of the Rideau region are set against a backdrop of the region's natural history. Although present in Ottawa and Kingston, the Rideau's natural history – its lakes, conservation areas, and natural environments – dominate the rural expanse situated between Ottawa and Kingston, particularly where the that expanse is intersected by the Rideau Canal. Additionally, each Canal lock station offers a natural history experience.

For its part, the industrial heritage of the Rideau is a component of the region's cultural typology with modest strength, represented by industrial museums in Ottawa, Manotick, Kingston, Smiths Falls, and Delta. However, when these industrial museums are combined with science-based museums located in Ottawa and Kingston, there is a strong "science and discovery" experience along the Rideau.

With respect to agricultural heritage, this expression of the region's cultural heritage is surprisingly under-developed. Apart from the ByWard Market and the Canada Agriculture Museum, there are few agri-tourism experiences of note.

Finally, the cuisine component of the Rideau's cultural life is vibrant and varied, particularly in Ottawa and Kingston.

5.0 PRODUCT POSITIONING

5.1 The Rideau Canal

From the beginning, the conceptualization of the Rideau Cultural Heritage Corridor envisioned the Rideau Canal as the Corridor's "backbone". Stretching from the Ottawa River to the St. Lawrence, the Canal traverses each of the Corridor's three sub-regions, providing a cohesive element to the visitor experience. At the same time, the Canal's 20-plus lock stations engage the visitor with an experience of human, industrial, and natural history.

Given its cohesive function, its status as a National Historic Site, the likelihood of UNESCO world heritage designation, and the fact that the Canal already has a profile in the region's export markets, it is appropriate that the Rideau Canal be positioned at the centre of the Corridor marketing effort. Additionally, this positioning will aid the Corridor's less developed cultural experiences, particularly those that are located in the Rideau Valley / Rideau Lakes sub-region.

5.2 Lead, supporting, and sustaining experiences

Within each cultural product type (arts, human heritage, agricultural and industrial heritage, natural history), there are lead, supporting, and sustaining experiences. These designations are not judgments on the quality of the experiences. Rather, they represent the public profile and status of the experience within the tourism industry. In the Corridor marketing campaign, circulating visitors from lead attractions (with a high public profile) toward supporting and sustaining attractions (with a lower public profile) will be essential to the Corridor's success.

To this end, each market-ready Corridor experience has been assigned below to a lead, supporting, or sustaining category relative to other Corridor experiences of the same type. In total, there are 192 inventoried cultural experiences that meet the market-readiness criteria for the Corridor, along with 19 community heritage festivals located in the Rideau Lakes / Rideau Valley sub-region. Each experience is positioned below, by product type, for each of the three sub-regions.

5.2.1 Greater Ottawa

THE ARTS

	<u>Lead</u>	<u>Supporting</u>	<u>Sustaining</u>
1. Performing Arts Events & Festivals	Cisco Systems Bluesfest Canada Dance Festival Magnetic North Theatre Festival NAC Orchestra NAC English Theatre NAC French Theatre NAC Presenting Program Ottawa Chamber Music Festival	Arts Court Theatre Centrepointe Theatre Ottawa Folk Festival Great Canadian Theatre Co. NAC Fourth Stage La Nouvelle Scene Le Groupe Danse Lab Opera Lyra Ottawa Fringe Festival Ottawa Jazz Festival* Ottawa Symphony Orchestra Sparks Street Buskers Festival	Odyssey Theatre On the Verge New Play Festival
2. Media Arts Events & Festivals	Ottawa Animation Festival Sound & Light Parliament Hill	Canadian Film Institute	
3. Literary Arts Events & Festivals		Ottawa Writers Festival	
4. Public Art	Street Smart Promenart		
5. Public Art Galleries	Museum of Photography National Art Gallery	Carleton University Art Gallery City Hall Art Gallery Karsh-Masson Gallery Ottawa Art Gallery	

GREATER OTTAWA, CONT'D

6. Commercial Art Galleries	Galerie d'art Vincent Lafreniere & Pai Gallery	Art Mode Gallery Carlen Gallery Carmel Gallery Dale Smith Gallery Galerie d'art Jean-Claude Bergeron Galerie St. Laurent + Hill Gallery of the Kanadas Gallery Snapdragon Inuit Art Foundation The Snow Goose	
7. Artist Studio Tours		Central Ottawa Artists Tour	
8. Artist Run Centres		Gallery 101 . Galerie 101	SAW Gallery SAW Video

Product count: 49

Notes: (a) Arts Court Theatre, Centrepointe Theatre, La Nouvelle Scene, and the NAC Presenting Program present a variety of music, theatre, and dance events. These events are not counted here, only the venues. (b) The Canadian Film Institute presents several film series with different branding. These are counted here as one product. (c) The Executive Director of the Ottawa Jazz Festival declined to meet with Burnett Thorne.

HUMAN HERITAGE

	<u>Lead</u>	<u>Supporting</u>	<u>Sustaining</u>
1. Human History Museums	Canada and the World Pavilion Museum of Civilization War Museum Portrait Gallery of Canada	Billings Estate Museum Bytown Museum Laurier House	Canadian Ski Museum
2. Heritage Festivals	Winterlude	Canada Day Celebration Doors Open Ottawa Antique & Classic Boat Show	
3. Misc. Heritage Attractions	RCMP Musical Ride Rideau Hall Supreme Court Tour Program Tours of Parliament	Haunted Walks of Ottawa Library and Archives Canada Ottawa on Foot	
4. Canal Lock Stations	Hogs Back Lock Station Ottawa Lock Station	Black Rapids Lock Station Long Island Lock Station	Hartwells Lock Station

Product count: 24

AGRICULTURAL & INDUSTRIAL HERITAGE

	<u>Lead</u>	<u>Supporting</u>	<u>Sustaining</u>
1. Farmers' Markets		ByWard Market	
2. Agricultural Museums	Agriculture Museum		
3. Open Farms		Saunders Farm Valleyview Little Animal Farm	
4. Industrial Museums	Aviation Museum Science & Technology Museum	Currency Museum Watsons Mill	
5. Factory Tours	Royal Canadian Mint		

Product count: 9

Note: The Manager of International Advertising for the Royal Canadian Mint indicated that the Mint will not participate in the Corridor.

NATURAL HISTORY

	<u>Lead</u>	<u>Supporting</u>	<u>Sustaining</u>
1. Natural History Museums	Museum of Nature		
2. Natural History Festivals	Canadian Tulip Festival		
3. Decorative Gardens		Ornamental Gardens Arboretum Tropical Greenhouse	

Product count: 5

Notes: (a) The Ornamental Gardens, Arboretum, and Tropical Greenhouse are on the grounds of the Central Experimental Farm, adjoining the Canada Agriculture Museum. (b) The Executive Director of the Canadian Tulip Festival declined to meet with Burnett Thorne.

5.2.2 Rideau Valley/Rideau Lakes

THE ARTS

	<u>Lead</u>	<u>Supporting</u>	<u>Sustaining</u>
1. Visual Art Festivals & Events		Merrickville Fine Art Festival Rideau Valley Art Festival Rideau Canal Fine Craft Show & Jamboree	
2. Performing Arts Events & Festivals		Music on the Rideau Stewart Park Festival	
3. Commercial Art Galleries	River Guild Fine Crafts	MOTH Gallery	
4. Artist Studios		Cimarella Gallery Emma's Quilt Shop Ferrytale Studio Hart Pottery and Gourds Holly Dean Kevin Robert Gary Glass Kiss My Glass Hot Gallery Paterson's Glass Blowing Peter Doef	Anna Moffat Studio Laura Starkey
5. Artist Studio Tours	Perth Autumn Studio Tour	Country Lanes Studio Tour Merrickville Artist Guild Studio Tour Fall Colours Studio Tour	

Product count: 22

HUMAN HERITAGE

	<u>Lead</u>	<u>Supporting</u>	<u>Sustaining</u>
1. Human History Museums	Rideau Canal Museum Heritage House Museum	Merrickville Blockhouse Museum Chaffey's Lockmaster's House Jones Falls Lockmaster's House Rideau District Museum Matheson House	
2. Heritage Festivals			Chocolate and Railway Festival Smiths Falls Winter Carnival Seeley's Bay Frost Fest Delta Fair Delta Maple Syrup Festival Dickinson Days Elgin Days Elgin Winter Carnival

RIDEAU VALLEY/RIDEAU LAKES, CONT'D

Dandelion Festival
Lombardy Fair
Lyndhurst Turkey Fair
Merrickville Agricultural Fair
Merrickville Canal Fest
Newboro Winter Carnival
Perth Garlic Festival
Perth Fall Fair
Festivals of the Lights
Festival of the Maples
Westfest

3. Misc. Heritage Attractions

Perth Antique Show
Westport Antique Show

4. Canal Lock Stations

Black Rapids Lock Station
Burritts Rapids Lock Station
Chaffeys Lock Station
Jones Falls Lock Station

Beveridges Lock Station
Detached Lock Station
Edmonds Lock Station
Kilmarnock Lock Station
Lower Brewers Lock Station

Clowes Lock Station
Davis Lock Station
Poonamalie Lock Station

Narrows Lock Station
Newboro Lock Station
Nicholsons Lock Stations
Old Slys Lock Station
Smiths Falls Lock Station
Upper Brewers Lock Station

Product count: 27 (46 if community festivals are included in the count)

AGRICULTURAL & INDUSTRIAL HERITAGE

	<u>Lead</u>	<u>Supporting</u>	<u>Sustaining</u>
1. Farmers' Markets		Perth Farmers' Market	
2. Open Farms & Orchards		Kilmarnock Orchards	
3. Industrial Museums		Smiths Falls Railway Museum Old Stone Mill Museum	
4. Factory Tours		Hershey Chocolate Shoppe	

Product count: 5

NATURAL HISTORY

	<u>Lead</u>	<u>Supporting</u>	<u>Sustaining</u>
1. Natural History Museums		Biodiversity Museum	
2. Nature Trails	Rideau Trail Cataragui Trail		
3. Parks & Conservation Areas	Baxter Conservation Area Foley Mountain Conservation Area Murphy's Point Provincial Park Rideau Bird Sanctuary	Perth Wildlife Reserve	
4. Decorative Gardens		Down to Earth Gardens Rideau Woodland Ramble	
5. Misc. Natural History Attractions	Silver Queen Mine Trail		

Product count: 11

5.2.3 Greater Kingston

THE ARTS

	<u>Lead</u>	<u>Supporting</u>	<u>Sustaining</u>
1. Visual Arts Events & Festivals	Fanfayre		
2. Performing Arts Events & Festivals	Buskers Rendezvous Grand Theatre Grant Hall Series Limestone Blues Festival Theatre Kingston	Faculty Recital Series Kingston Jazz Festival Kingston Symphony	
3. Media Arts Events & Festivals		Kingston Film Festival	
4. Multidisciplinary Art Festivals		Festival on the St. Lawrence	
5. Public Art Galleries	Agnes Etherington Centre		Union Gallery
6. Commercial Art Galleries		Cornerstone Fine Crafts Gallery G.R.	
7. Artists Studios		Fireworks Glass Blowing	
8. Artist Studio Tours		Town & Country Studio Tour	
9. Artist Run Centres		Modern Fuel Artist Centre	

Product count: 18

Note: (a) The Grand Theatre is a performing arts venue that presents a variety of music, theatre, and dance events. These events are counted here as one product.

HUMAN HERITAGE

	<u>Lead</u>	<u>Supporting</u>	<u>Sustaining</u>
1. Human History Museums	Fort Henry Bellevue House	Correctional Museum Kingston Mills Block House Museum of Health Care Murney Tower RMC Museum	Hockey Hall of Fame
2. Misc. Heritage Attractions		Confederation Trolley Tour Haunted Walks of Kingston Kingston City Hall Tour	Fairfield House
3. Canal Lock Stations	Kingston Mills Lock Station		

Product count: 13

AGRICULTURAL & INDUSTRIAL HERITAGE

	<u>Lead</u>	<u>Supporting</u>	<u>Sustaining</u>
1. Farmers' Markets		Kingston Public Market	
2. Industrial Museums	Marine Museum Military Communications Museum Woodworking Museum	Pump House Steam Museum	

Product count: 5

NATURAL HISTORY

	<u>Lead</u>	<u>Supporting</u>	<u>Sustaining</u>
1. Natural History Museums			Miller Museum of Geology
2. Misc. Natural History Attractions			Heirloom Seed Sanctuary Summerhill Arboretum
3. Conservation Areas	Catarauqui Creek		
Product count: 4			

5.3 Heritage artisans / nightlife

There are two product clusters that are not included in the inventory for Rideau Cultural Heritage Corridor: heritage artisans, and nightlife.

Heritage artisans include custom jewelers, leatherworkers, wrought iron workers, candle makers, boat builders, toy makers, makers of hand-woven garments, and other craftspersons who create hand-fashioned, functional objects with a high aesthetic value. Nightlife includes comedy clubs, jazz clubs, blues clubs, dinner theatre, and other forms of nightlife entertainment.

To include heritage artisans and nightlife in the Corridor inventory would exceed the scope of work defined for this project. Accordingly, as defined in our work plan, we have limited the inventory of artists and artisans to those who produce decorative art or craft. Similarly, we have limited the inventory of the performing arts to music, dance, and theatre that occur in venues designed for the presentation of these art forms, rather than restaurants, clubs, or bars. That said, we believe there is a place for heritage artisans and nightlife within the Corridor.

We recommend that second iteration of the Corridor marketing campaign include these two product clusters. These product clusters can be featured as "new additions" to the Corridor, and used as a marketing hook.

5.4 Community heritage festivals / A caveat

Throughout the Rideau, many towns and villages stage community festivals and fairs. These festivals and fairs bring citizens together in a celebration of community life. Typically, community festivals and fairs include face-painting events for children, clowns, home-baked goods, crafts, raffles, police demonstrations or demonstrations by the fire department, animal displays, and various musical entertainments. In many instances, the festival's brand is derived from an aspect of the community's heritage – for example, the Chocolate and Railway Festival in Smiths Falls, or Canal Fest in Merrickville.

For most culturally oriented travelers, community festivals and fairs are not a travel motivator. However, we believe that, in the broadest sense, community festivals and fairs are an expression of the Rideau's cultural heritage. Therefore, we have included community festivals and fairs for the Rideau Valley / Rideau Lakes sub-region only as "sustaining" cultural attractions in the product matrix above.

In the Corridor marketing collateral, it will be essential to position community festivals and fairs in such a manner that they are not confused with professional festivals.

5.5 Recreational attractions

The Rideau Canal and Rideau Lakes region has long been a recreational playground. In summer, swimming, fishing, hiking, kayaking and canoeing are popular diversions. In winter, skating, snowmobiling and cross-country skiing come to the fore.

As a cultural tourism initiative, the Rideau Cultural Heritage Corridor focuses on five product clusters: arts, human history, agricultural and industrial history, natural history, and cuisine. It would be inconsistent with the Corridor's mandate, and with its brand, if the Corridor were to market the region's recreational opportunities alongside its cultural assets. Moreover, tourism research indicates a weak crossover between participation in cultural activities and participation in recreational activities. Cultural tourism and recreational tourism are two distinct market segments. An attempt to target both market segments within a single campaign would be ill advised.

However, recognizing that a small cohort of cultural travelers may consume recreational products, we see no reason why the Corridor visitors guide and web site cannot reference the abundance of recreational opportunities available in the region.

5.6 Exclusions

The following 53 attractions, which were originally included in the master database, did not meet the market-readiness criteria for their product type.¹

<u>Product name</u>	<u>Product type</u>	<u>Product location</u>
Alloy Foundry/Village Metalsmiths	Heritage artisan	Merrickville
ArtCraft Gallery	Gift shop	Westport
Astrolabe Gallery	Commercial art gallery	Ottawa
Atrium Gallery	Public art gallery	Ottawa
Beechwood Cemetary	Heritage attraction	Ottawa
Canada's Four Corners Gallery	Commercial art gallery	Ottawa
Canal Gallery	Commercial art gallery	Merrickville
Chapman Mills Conservation Area	Conservation area	Ottawa
Charles Spratt Art Gallery	Artist studio	Manotick
Common Wonders	Gift shop	Westport
Country Bumpkins	Gift shop	Merrickville
Dickinson Square Conservation Area	Conservation Area	Manotick
Enriched Bread Artists	Artist studio	Ottawa
Ferguson Forest Center	Nature interpretation centre	Kemptville
Forfar Cheese Factory	Specialty food producer	Forfar
Foyer Gallery	Public art gallery	Ottawa
Fulford Gallery	Commercial art gallery	Ottawa
Gallery at the Mill	Commercial art gallery	Chaffey's Lock Station
Green Shutters	Gift shop	Merrickville
Gunnebrooke Farms	Specialty food producer	Elgin
Hilltop Studio	Artist studio	Merrickville
Jasper Apple Farm	Open farms and orchards	Jaspar
Kemptville Farmers Market	Farmers market	Kemptville
Knits and Woodcrafts	Gift shop	Merrickville
Koyman Galleries	Commercial art gallery	Ottawa
Lemonie Point Conservation Area	Conservation area	Collins Bay
Merrickville Postcard Show	Heritage festival	Merrickville
Mill Pond Conservation Area	Conservation Area	Lombardy
Miller's Berry Farm	Agritourism attraction	Manotick
Mirick's Landing Country Store	Gift shop	Merrickville
North Gower Farmers' Market	Farmers' market	North Gower
Northern Edge	Gift shop	Westport
Ottawa Pride	Gay pride festival	Ottawa
Ottawa School of Art Gallery	Commercial art gallery	Ottawa
Out of Africa	Gift shop	Merrickville
Parrots Bay Conservation Area	Conservation Area	Kingston
Pleasant View Farms	Agritourism attraction	Crosby
Portland Bay Conservation Area	Conservation Area	Portland

¹ Market-readiness criteria used to assess various cultural experiences are the property of Burnett Thorne Cultural Tourism.

Pottery by Boz
 Princess of Wales' Military Museum
 Red Trillium Studio Tours
 Rideau Creek Landing
 Rideau Ferry Conservation Area
 Rideau Heights Studio
 Rideau River Provincial Park
 The Schoolhouse Studio
 Stillwoods Craft Shop
 Sword & Ploughshares Museum
 Tay River Gallery
 The Carousel
 The Knitting Studio
 V.O. Sugarplums
 W.A. Taylor Conservation Area

Artist studio
 Regimental museum
 Artist studio tour
 Gift shop
 Conservation area
 Artist studio
 Provincial park
 Artist studio
 Gift shop
 Private museum
 Commercial art gallery
 Commercial art gallery
 Gift shop
 Gift shop
 Conservation area

Merrickville
 Kingston
 Ottawa
 Merrickville
 Rideau Ferry
 Merrickville
 Kemptville
 Merrickville
 North Gower
 Kars
 Perth
 Perth
 Portland
 Perth
 Merrickville
 Osgoode

5.7 Non responders

The following 19 attractions may have met the criteria for inclusion in the Corridor; however, repeated efforts to arrange a meeting to introduce the Corridor proved unsuccessful. Accordingly, at present, these attractions cannot be included in the Corridor marketing campaign.

<u>Product name</u>	<u>Product type</u>	<u>Product location</u>
Available Light Collective	Media arts event	Ottawa
Black Duck Studio	Artist studio	Perth
Calligrammes Gallery	Commercial art gallery	Ottawa
Canadian Tulip Festival	Heritage festival	Ottawa
Capital Double Decker and Trolley Tours	Cultural tour operator	Ottawa
Classic Antique Shows, Inc.	Heritage festival	Ottawa
Corel Centre	Performing arts venue	Ottawa
gallery . four . seven . nine	Commercial art gallery	Ottawa
Gibbons Farm Sugar House and Museum	Specialty food producer	Frankville
Merrickville Village Studio/Gallery	Commercial art gallery	Merrickville
Nepean Museum	Community museum	Ottawa
Ottawa International Jazz Festival	Performing arts festival	Ottawa
Ottawa Wine and Food Show	Cuisine festival	Ottawa
Powers Fine Art Gallery & Studio	Commercial art gallery	Merrickville
Quintessential Ottawa	Cultural tour operator	Ottawa
Rothwell Gallery	Commercial art gallery	Ottawa
Signatures Craft Show	Visual arts festival	Ottawa
Turtle Island Tourism Company	Aboriginal heritage attraction	Ottawa
West End Artists Tour	Artists studio tour	Ottawa

5.8 Refusals

Although they met the criteria for inclusion in the Corridor, the following attractions made clear that they do not intend to participate.

<u>Product name</u>	<u>Product type</u>	<u>Product location</u>
Le Festival Franco-Ontarien Inc.	Performing arts festival	Ottawa
Royal Canadian Mint	Heritage factory tour	Ottawa

6.0 THE CORRIDOR'S THEMES

The cultural typology defined for the Rideau Cultural Heritage Corridor (Section 4.6) has guided us to designate seven themes for interpreting the Corridor. Each of these themes is cited below, including a listing of the cultural experiences that correspond to each theme, and a brief thematic overview.

When designating these themes, attention was paid to ensuring that each theme would target at least one of the four cultural tourism cohorts described in Section 3.2. The cohort(s) that each theme targets is noted below. The designation of each cultural experience as "lead", "supporting", or "sustaining", differs from the designations found in Section 5. Here, designations are determined relative only to the other cultural experiences that belong to same theme.

6.1 Story of a Nation

Because the story of the Rideau Canal is a central chapter in the story of Canada, and given that Ottawa is the nation's capital and home to a variety of federal institutions, we propose a theme entitled, "Story of a Nation", as an interpretive window for 32 cultural experiences that correspond to this theme. These experiences range from the tour programs of federal institutions such as Parliament, Rideau Hall, and the Supreme Court, through to the pioneer stories illustrated by such assets as the Billings Estate Museum, Matheson House, and the Rideau District Museum. The Rideau Canal itself would feature prominently in this theme. The Canal's story would be told, in large measure, by the Rideau Canal Museum, and by five selected lock stations (four of which feature blockhouse museums, lockmaster's houses, or significant interpretive displays).

	<u>Lead</u>	<u>Supporting</u>	<u>Sustaining</u>
Greater Ottawa	War Museum Rideau Hall Supreme Court Tour Program Tours of Parliament Royal Canadian Mint Portrait Gallery of Canada Canada & the World Pavilion	Bytown Museum Laurier House Currency Museum RCMP Musical Ride Ride Billings Estate Museum Ottawa on Foot Ottawa Lock Station Hogs Back Lock Station	
Rideau Valley Rideau Lakes		Matheson House Rideau District Museum Smiths Falls Railway Museum Heritage House Museum Rideau Canal Museum Watson's Mill Old Stone Mill Museum	Chaffeys Lockmaster's House Merrickville Blockhouse Museum Jones Falls Lockmaster's House
Greater Kingston	Fort Henry Bellevue House	Murney Tower Kingston City Hall Tour RMC Museum	Fairfield House Kingston Mills Block House

Product count: 32

Target cohort: Heritage tourism enthusiasts

6.2 Adventures in Discovery

A variety of cultural experiences along the Rideau Corridor are either science or discovery-based institutions or attractions. These range from the Museum of Civilization and the Museum of Science and Technology (in Ottawa), to the Biodiversity Museum (in Kemptville), to the Museum of Health Care (in Kingston). Accordingly, we propose a theme entitled “Adventures in Discovery” for the 17 cultural experiences that correspond to this theme. Of note, we believe this theme will bolster the Corridor’s family market, which, as demonstrated by the research outlined in Section 3, is not a strong market within the cultural tourism segment.

	<u>Lead</u>	<u>Supporting</u>	<u>Sustaining</u>
Greater Ottawa	Agriculture Museum Aviation Museum Museum of Nature Science & Technology Museum Museum of Civilization Library and Archives Canada	Valleyview Little Animal Farm	
Rideau Valley Rideau Lakes		Biodiversity Museum Silver Queen Mine Trail	Kilmarnock Orchards
Greater Kingston		Pump House Steam Museum Museum of Health Care Marine Museum Military Communications Museum Woodworking Museum	Miller Museum of Geology Heirloom Seed Sanctuary

Product count: 17

Target cohort: Heritage tourism enthusiasts

6.3 Celebrations and Diversions

The Rideau Corridor boasts a variety of major festivals. These festivals range from Winterlude (in Ottawa), to the Stewart Park Festival (in Perth), to the Limestone Blues Festival (in Kingston). In addition to the Corridor’s festival product, the Corridor also features a cluster of intriguing assets that do not fit within other Corridor themes. These assets include the Hershey Chocolate Shoppe (in Smiths Falls, the Canadian Ski Museum (in Ottawa), and the Correctional Museum (in Kingston). We therefore propose a theme entitled, “Celebrations and Diversions”, to showcase call the festivals along the Rideau Corridor (regardless of product type), and the unique non-festival assets that are not captured elsewhere.

	<u>Lead</u>	<u>Supporting</u>	<u>Sustaining</u>
Greater Ottawa	Winterlude Ottawa Jazz Festival Canadian Tulip Festival Cisco Systems Bluesfest Ottawa Chamber Music Festival Ottawa Animation Festival Canada Dance Festival ByWard Market	Sound & Light Show Parliament Hill Canada Day Celebration Doors Open Ottawa Ottawa Folk Festival Ottawa Fringe Festival Sparks Street Buskers Festival Haunted Walks of Ottawa Saunders Farm Antique & Classic Boat Show Ottawa Writers’ Festival Central Ottawa Artists Tour	Canadian Ski Museum
Rideau Valley Rideau Lakes		Music on the Rideau Stewart Park Festival Perth Antique Show Westport Antique Show Merrickville Fine Art Festival Rideau Valley Fine Art Festival Country Lanes Studio Tour	Perth Farmers’ Market

		Merrickville Artists Guild Studio Tour Rideau Canal Fine Craft Show & Jamboree Fall Colours Studio Tour Hershey Chocolate Shoppe	
Greater Kingston	Buskers Rendezvous Limestone Blues Festival Fanfayre	Kingston Jazz Festival Festival on the St. Lawrence Kingston Film Festival Haunted Walks of Kingston Correctional Museum Town & Country Studio Tour	Hockey Hall of Fame Kingston Public Market

Product count: 43

Target cohort: Performing arts tourism enthusiasts, heritage tourism enthusiasts

6.4 Curtain Rising

“Curtain Rising” is a theme that we propose for the Corridor’s theatre, music, and dance events that are either produced by professional companies (such as the Great Canadian Theatre Company, in Ottawa), or presented by performing arts venues with a presenting season (such as the Grand Theatre, in Kingston). Additionally, we have included one festival in this category: the On the Verge New Play Festival, staged at the National Arts Centre. Regrettably, there are no performing arts experiences to be found in the Rideau Valley/Rideau Lakes sub-region that correspond to this theme. This is not unexpected, since there are no communities outside of Ottawa and Kingston whose population is sufficient to support professional companies or performing arts venues with a presenting season.

	<u>Lead</u>	<u>Supporting</u>	<u>Sustaining</u>
Greater Ottawa	NAC Orchestra NAC English Theatre NAC French Theatre NAC Presenting Program	Arts Court Theatre Canadian Film Institute Great Canadian Theatre Co. Centrepointe Theatre NAC Fourth Stage La Nouvelle Scene Le Groupe Danse Lab Opera Lyra Ottawa Symphony Orchestra	Odyssey Theatre On the Verge New Play Festival
Greater Kingston	Grand Theatre Grant Hall Series	Theatre Kingston Kingston Symphony Faculty Recital Series	

Product count: 20

Target cohort: Performing arts tourism enthusiasts

6.5 Colours along the Rideau

The Rideau Cultural Heritage Corridor features a broad array of visual arts assets. In total, 42 public art galleries, commercial art galleries, and artist studios are located within the Corridor’s jurisdiction. This concentration of visual arts experiences ranges from 5 public art galleries and 12 commercial art galleries (in Ottawa), to a cluster of 11 artist studios (in Merrickville), to the Agnes Etherington Art Centre (in Kingston). We propose a theme entitled, “Colours along the Rideau”, to showcase these visual arts assets.

	<u>Lead</u>	<u>Supporting</u>	<u>Sustaining</u>
Greater Ottawa	National Art Gallery Museum of Photography	Carleton University Art Gallery City Hall Art Gallery Karsh-Masson Gallery Art Mode Gallery Carlen Gallery	SAW Gallery SAW Video

		Carmel Gallery Dale Smith Gallery Galerie d'art Jean-Claude Bergeron Galerie d'art Vincent Galerie St. Laurent + Hill Gallery of the Kanadas Gallery Snapdragon Inuit Art Foundation Lafreniere & Pai Gallery The Snow Goose Ottawa Art Gallery Gallery 101 . Gallerie 101 Street Smart Promenart	
Rideau Valley	River Guild Fine Crafts	MOTH Gallery	Anna Moffat Studio
Rideau Lakes	Perth Autumn Studio Tour	Hart Pottery and Gourds Emma's Quilt Shop Cimarella Gallery Ferrytale Studio Holly Dean Kevin Robert Gary Glass Kiss My Glass Hot Gallery Paterson's Glass Blowing Peter Doef	Laura Starkey
Greater Kingston	Agnes Etherington Art Centre	Cornerstone Fine Crafts Gallery G.R. Fireworks Glass Blowing Modern Fuel Artist Centre	Union Gallery

Product count: 42
Target cohort: Visual arts tourism enthusiasts

6.6 A Day in the Village

"A Day in the Village" is a theme that focuses on community life in the towns and villages along the Rideau, outside of Ottawa and Kingston. The intent of this theme is to provide the visitor with an experience of the rural culture of the region and the region's communities. It will profile the region's principal towns and villages, reference the many attractions in the Rideau Valley / Rideau Lakes sub-region that are already identified within other themes, and include the 19 community festivals and fairs listed under Section 5.2.2, "Rideau Lakes / Rideau Valley: Heritage festivals". Within this theme, special attention will be paid to the Rideau Canal lock stations, and to facilitating visitor access to this asset.

	<u>Lead</u>	<u>Supporting</u>	<u>Sustaining</u>
Rideau Valley	As identified within other themes	As identified within other themes	Chocolate and Railway Festival
Rideau Lakes			Smiths Falls Winter Carnival Seeley's Bay Frost Fest Delta Fair Delta Maple Syrup Festival Dickinson Days Elgin Days Elgin Winter Carnival Dandelion Festival Lombardy Fair Lyndhurst Turkey Fair Merrickville Agricultural Fair Merrickville Canal Fest Newboro Winter Carnival Perth Garlic Festival Perth Fall Fair Festivals of the Lights Festival of the Maples Westfest

Product count: 19 community heritage festivals, plus 49 products already counted within other themes
Target cohort: All cohorts

6.7 Peaceful Solitudes

We propose a theme entitled, “Peaceful Solitudes”, for 16 natural history experiences that we have identified along the Rideau Corridor. These experiences range from the Ornamental Gardens and Arboretum (in Ottawa), to the Foley Mountain Conservation Area (in Westport), to the Cataraqui Creek Conservation Area (in Kingston). As might be anticipated, 10 of the Corridor’s 16 natural history experiences are located in the Rideau Valley/Rideau Lakes sub-region. Although there are additional natural history experiences in Ottawa that could be added to the inventory and promoted under this theme, we advise against this action. Natural history is strength of the Rideau Valley/Rideau Lakes sub-region. In our view, highlighting Ottawa’s many natural history experiences could encourage Ottawa-based travelers seeking natural history to forego exploring the Corridor between Ottawa and Kingston.

	<u>Lead</u>	<u>Supporting</u>	<u>Sustaining</u>
Greater Ottawa	Long Island Lock Station	Ornamental Gardens Arboretum Tropical Greenhouse	
Rideau Valley Rideau Lakes	Rideau Trail Burritts Rapids Lock Station Baxter Conservation Area Foley Mountain Conservation Area Murphys Point Provincial Park	Cataraqui Trail Perth Wildlife Reserve Down to Earth Gardens Rideau Woodland Ramble Rideau Bird Sanctuary	
Greater Kingston	Cataraqui Creek Conservation Area		Summerhill Arboretum

Product count: 16

Target cohort: Heritage tourism enthusiasts, nature-based tourism enthusiasts.

7.0 SWOT ANALYSIS

The following is a summary of the strengths, weaknesses, opportunities and threats to the success of the Rideau Cultural Heritage Corridor.

7.1 Strengths

- The greatest single strength of the Rideau Cultural Heritage Corridor is its aggregate of world-class arts and heritage experiences, anchored by the Canal itself - the oldest continually operated Canal in North America - and by Canada's national cultural institutions in the City of Ottawa. Without question, the Corridor offers one of the premier cultural tourism experiences on the continent.
- As the "backbone" of the Corridor, the Rideau Canal provides not only a cohesive cultural element to the visitor experience, but equally, a lens through which much of the larger story of Canada can be told. With Canada's current capital at the Canal's northern terminus, and its original capital at the Canal's southern terminus, the Canal affords a unique window for interpreting Canada's origins as a nation.
- The Canal's link to American history vis-à-vis the War of 1812 provides a useful "hook" for marketing the Corridor in the U.S.
- The absence of a competing cultural tourism corridor elsewhere in Eastern Canada advantages the Rideau Corridor. While Montreal, Toronto, and Niagara all possess significant arts, heritage, and cuisine assets, none of these destinations have aggregated their cultural assets inside a single campaign. Accordingly, the Rideau Corridor will enjoy a unique competitive advantage when targeting culturally oriented travelers.
- Although there are a growing number of cultural tourism initiatives in the U.S., only the Greater Philadelphia Tourism Marketing Corporation features a UNESCO World Heritage Site - Independence Hall - within a cultural tourism campaign. Assuming a World Heritage designation is bestowed on the Rideau Canal by UNESCO, the Rideau Corridor will acquire an elite status, a cultural cachet, and a distinct marketing advantage.
- The principal demographic markets for the Rideau Corridor are the boomer generation and the 55-plus market. Increasingly, these markets are using the Internet for travel planning, decision-making, and booking reservations. According to the Ipsos-Reid polling firm, 60 percent of Canadians over the age of 55 now have Internet access, a 12 percent increase in the past year alone. With respect to marketing, the Internet affords the Corridor a potent, cost-effective vehicle for reaching its targeted demographic, both in Canada and abroad.
- Cultural tourism initiatives do not commonly embrace natural history, despite the role of natural history in shaping human culture, and evidence of crossover consumption of natural history experiences by culturally oriented travelers. The fact that much of the Rideau Corridor offers natural history experiences, and that these experiences are dispersed throughout a sizeable rural region, strengthens the appeal of the Corridor to culturally oriented travelers.

- As a region that has suffered through the post-9/11, post-SARS tourism downturn, tourism operators and marketing agencies throughout the Rideau region are keen to identify a means to assist the industry's recovery. The necessity of rebuilding the region's bruised tourism economy – along with the opportunity to establish the Rideau as a premier destination – are industry conditions that support the Corridor's success.
- Many of the 150-plus attractions that comprise the Corridor are sizeable institutions or festivals with substantial marketing budgets. Additionally, new hotel occupancy taxes instituted in Ottawa and Kingston have increased substantially the marketing resources available to these cities. As a result, the climate is promising for securing meaningful investment in the Corridor marketing campaign.
- Air connections in and out of the Corridor are excellent, particularly via Ottawa, where WestJet, and CanJet augment Air Canada's service with value pricing.
- VIA Rail's Montreal-Ottawa-Kingston-Toronto service, which traverses the heart of the Corridor, affords a major opportunity for a corporate partnership to carry the Corridor product to all of VIA's markets.
- Given Montreal's cultural cachet and its popularity in international markets, the Corridor's proximity to Montreal affords a variety of opportunities for innovative packaging and marketing initiatives. With respect to Montreal-based receptive operators, the promotion of the Corridor by one firm is likely to yield competitive programs from others.

7.2 Weaknesses

- The Rideau region, on balance, does not possess a compelling natural beauty. Although there are areas of the Rideau that are notable exceptions (including much of the Ottawa-Merrickville drive along the Rideau River, the views that overlook the Ottawa River and the Village of Westport, and many of the Canal lock stations), most of the rural expanse between Ottawa and Kingston is less than visually stunning. Given the necessity to circulate Corridor travelers between Ottawa and Kingston, the limited appeal of the Rideau landscape is a weakness in the Corridor product.
- Directional signage for Rideau Canal lock stations appears not be designed to attract visitor traffic. With few exceptions, Canal signage is modest and discrete. In one instance at Upper Brewers Lock (there may be others) directional signage for the turnoff to the lock station (from Highway 12 onto Canal Road) is visible on Highway 12 when heading west only. There is no signage for the Canal Road turnoff when approaching Upper Brewers on Highway 12, heading east.
- Outside of Ottawa and Kingston, and with few exceptions (notably, the Sam Jakes Inn, in Merrickville), the Corridor's accommodation and cuisine infrastructure is weak. This condition is likely to inhibit explorations of the Rideau Valley/Rideau Lakes sub-region to day-trip excursions that originate in either Ottawa or Kingston. In the short term, little can be done to alter this circumstance. However, as the tourism impact of the Corridor grows over time, demand for quality cuisine and accommodation will drive an increase in supply.

- The lack of a signature hotel in the Kingston sub-region is a notable weakness. With due respect to the Holiday Inn, Best Western, Comfort Inn and Four Points, the presence in Kingston of a Fairmont, Westin, or Sheraton would lend considerable weight to the Corridor's southern terminus. Apart from providing the style of accommodation sought by many cultural travelers, a signature hotel has a positive impact on a destination that reverberates internationally. Such a hotel brings the combined marketing muscle of the chain to bear on the destination, which then appears in countless publications and web sites.
- The highly conservative nature of the commercial package tour industry disadvantages the introduction of new tourism products. Many mainstream tour operators are paternalistic, displaying "know-best" attitudes to product development. Many view new packaging ideas as too costly. To others, cultural packaging is virtually unknown. Overcoming these attitudes will require a strategic approach to be addressed within the marketing plan. That said, there are a handful of in-bound tour operators that will be interested in the Corridor. These operators are spread throughout Canada, but most are concentrated in Quebec and Ontario.
- The agri-tourism product along the Rideau is surprisingly weak, with few operators capitalizing on this growing market segment.
- The Corridor's aboriginal product is also weak, affecting the Corridor's appeal to the overseas market, and to the German market in particular.
- Currently, there is no resource available to help raise the Corridor's near market-ready cultural experiences to market-ready status. Beyond the first iteration of the Corridor marketing campaign, this circumstance will inhibit the Corridor from realizing its full potential. However, this circumstance also affords an opportunity (perhaps for the entity that will govern the Corridor, perhaps for the Ministry of Tourism, or perhaps for both), to address product development issues along the Rideau Corridor by conceiving and implementing a product development strategy.

7.3 Opportunities

- Should the Government of Canada (through the Department of Canadian Heritage, the Canadian Tourism Commission, or both) embrace the Rideau Cultural Heritage Corridor as a vehicle for introducing Canadians and foreign visitors to a key chapter in the "Canadian experience", the funding and resources that could be deployed in support of the Corridor would extend the scope of the marketing campaign far beyond what has been envisioned.
- Several lock station along the Rideau Canal afford opportunities for animation, whether by artisan ateliers, busking, first person interpretation, or special events. A prime example of such an opportunity is found at the Ottawa lock station, which enjoys a high volume of tourist traffic. In addition to ongoing animation that could occur throughout the summer season, the opening of the Ottawa locks each May affords a ready opportunity for an annual celebratory event.

- The UNESCO World Heritage Designation and Rideau 175 anniversary celebrations represent a significant opportunity for a call-to-action campaign for the 2007 tourism season. In addition to updating the Corridor web site and print collateral in 2007, the Corridor Executive Director can engage in wide range of communications with travel trade and travel media to capitalize fully on this opportunity.
- A significant opportunity exists to integrate Corridor products into mainstream tourism programs. Mainstream tourism carries the greatest volume of traffic, and existing programs can be altered to include Corridor products. The challenge lies in presenting a persuasive argument to mainstream operators.
- Recent hotel occupancy taxes introduced in Ottawa and Kingston afford the opportunity for substantial investment by these cities in their own marketing efforts, which can also reference the Corridor.
- The marketing and promotion of the Corridor would be aided significantly by an eloquent, regionally based spokesperson, someone who would be an educator, a salesperson and perhaps a figurehead for cultural tourism along the Rideau. An individual such as Pinchas Zuckerman comes to mind, able by the force of his personality to focus attention on the Corridor.
- A large segment of the Rideau's visitor population is VFR (i.e., visiting friends and relatives). As such, a strong in-market campaign to promote the Corridor will help reach Rideau residents, and, through them, reach the VFR segment. In Ottawa, the National Capital Commission (NCC) is already engaged in extensive marketing of that city's cultural assets to residents and VFR's. It therefore makes good sense to partner with the NCC.
- Once the "Grande Dame" of resort properties along the Rideau, the Opinicon Resort is now tired and forlorn. Given the heritage character of the Opinicon and its strategic positioning at Chaffey's Locks, the resort's refurbishment (along with the refurbishment of the Kenny Hotel at Jones Falls) would be a major boost to the inventory of accommodation properties in the Rideau Valley/Rideau Lakes sub-region.
- A significant opportunity exists for a regional cultural tour operator, based in Ottawa or Kingston, to capitalize on the Corridor once it is taken to market. At present, our inventory of the Rideau's cultural tour operators revealed only one firm that offers regional tours. Moreover, this operator did not respond to our repeated attempts to introduce the Corridor project. A partnership between a regional cultural tour operator and the entity responsible for governing the Corridor could be a profitable arrangement for both, and an additional means for promoting the Corridor in the Corridor's tourism markets.
- Over time, the opportunity exists for participating cultural suppliers to develop learning-based experiences that create new revenue streams for their business or organization, and conceivably, a revenue stream for the Corridor as well. Examples of such learning-based experiences include backstage tours and post-performance discussions with performers, customized gallery tours, meetings with museum curators to discuss a specific exhibit, and hands-on workshops offered by Corridor artisans.

7.4 Threats

- Over time, as the Rideau Corridor grows in stature and success, there is a threat the Corridor will be subsumed and integrated into a larger destination marketing initiative for the Rideau region and lose its unique identity. Pressures will arise to relax market-readiness standards and include more attractions. Some will argue that the Rideau's recreational tourism assets should be integrated into the cultural product mix. Without a sophisticated understanding of the cultural tourism market segment and the motivations and behaviours of culturally oriented travelers, a strong commitment to the integrity of the Corridor, and a set of governing policies and principles to guide the work of the entity that oversees the Corridor, it is likely that the quality, the appeal, and the success of the Corridor will be compromised over time.
- While showing occasional signs of recovery, U.S. leisure travel to Canada remains largely flat. Issues affecting reduced U.S. travel to Canada include post-9/11 concerns related to personal safety, an increase in security protocols for international travel, high gasoline prices impacting both air and rubber-tire traffic, and lingering negative perceptions related to the SARS episode of 2003. Next to the Canadian domestic market, the U.S. market is the principal source of potential Corridor visitors. Weak U.S. demand for travel to Canada does not support the Corridor's success.
- The success of a regional cultural tourism initiative such as the Rideau Corridor requires that civic destination marketing organizations (DMO's) within the Corridor's jurisdiction embrace the Corridor as the principal means for marketing their cultural assets. In developing the Rideau Corridor, we have already seen one DMO first reject the Corridor before subsequently embracing it. As the Rideau Corridor moves forward, it will be critical to maintain and nurture the status of civic DMO's as key Corridor stakeholders, ensuring their cultural tourism marketing objectives are consistently being met.
- As was demonstrated in the debate over Ottawa's 2004 budget, the City of Ottawa is ambivalent about its role in funding arts festivals and the city's other cultural assets. Civic funding of Ottawa's festivals received a one-year reprieve in the city's 2004 budget, after which Ottawa's hotel tax is meant to fund Ottawa's festivals. Given that Ottawa's arts funding is already among the lowest for major Canadian cities (about \$4 per capita), uncertain support for the arts in Ottawa threatens one of the Corridor's principal strengths.
- Historically, the low value of the Canadian dollar has secured Canada's reputation among U.S. travelers as a value-for-money destination, encouraging U.S. visitation. Conversely, the high value of the U.S. dollar has inhibited Canadian travel to the U.S., while encouraging domestic vacations. Of late, the rise of value in the Canadian dollar is reversing these travel behaviours. Fewer Americans are choosing Canada as a travel destination, while more Canadians are choosing to travel to the U.S. Although cultural oriented travelers are less price conscious than other leisure travelers, the rise of the Canadian dollar vis-à-vis its American counterpart does not advantage the Corridor.

8.0 CURRENT TOURISM CLIMATE

8.1 ANTICIPATING 2006/2007

According to *Ontario Tourism Facts and Figures* (Spring, 2005), total international border crossings into Ontario decreased by 0.8 percent in 2004 over 2003, and decreased by 17.3 percent over the same period in 2002. Total overnight crossings increased by 14.2 percent over 2003, but decreased by 6.4 percent over 2002.

With respect to U.S. visitations, border crossings dropped by 2.9 percent in 2004 over 2003 and by 23.7 percent over 2002. Border crossings from overseas countries increased by 15.5 percent over 2003, but decreased by 2.0 percent over 2002.

In short, 2004 indicators showed a mixed picture in Ontario's tourism recovery, with the U.S. market remaining weak, while the overseas market is returning near to 2002 levels.

A more optimistic interpretation of 2004 tourism indicators is found in *Sounds of Recovery More Widespread* (the CTC's tourism intelligence bulletin for January, 2005). According to the CTC, a tourism recovery is underway in Canada that "appears firmly rooted". The CTC notes, however, that the U.S. rebound in travel to Canada in 2004 "fell short of expectations". Reasons cited include the results of the 2004 U.S. election, the depreciation of the U.S. dollar, high gasoline prices, and the release of pent-up demand by U.S. travelers for trips to overseas destinations.

Concerning domestic travel by Canadians, the outlook for Canadian travel remains stable, according to the December 2004 *Travel Intentions Survey* of the Canadian Tourism Research Institute (CTRI). Overall, 66 percent of Canadians polled indicated that they planned to take a trip to a Canadian destination in the summer of 2005, a figure that is unchanged from 2004. Intentional surveys, however, are the least reliable of research tools. Therefore, we advise caution. More useful is the CTRI's estimate of growth in domestic leisure travel for the next two years, which in the modest range of 4 to 5 percent.

Overall, assessing the likely tourism climate for 2006/2007 is fraught with difficulty. Global political, economic, and environmental events ranging from 9/11 to SARS, from West Nile Virus to the Indonesian Tsunami, from gasoline prices to dollar exchange rates, have repeatedly compromised travel projections made during the past several years. This month (April, 2005), the United States announced that, in a program to be phased in over the next two years, U.S. citizens returning from travel to Canada will be required to show U.S. passports - a development that will surely not encourage U.S. leisure travel north of the 49th parallel.

We advise that, although all conditions that might affect the success of the Rideau Corridor should be monitored, planning for the Corridor marketing campaign should continue unabated. Ultimately, we believe the strength of the Corridor product will prove a powerful travel incentive such that - although factors that negatively effect travel will continue to plague the tourism industry - the Corridor product will outperform its competition in virtually any tourism industry environment.

9.0 A VISION FOR THE CORRIDOR IN 10 YEARS

9.1 Envisioning 2017

The year is 2017. The Rideau Cultural Heritage Corridor has been in the tourism marketplace for ten years. During this time, the reputation of the Rideau region as a cultural destination has been well established in Ontario's domestic and export markets. The Corridor is responsible for significant growth in visitor volume and revenues. At the same time, the success of the Corridor has spurred restaurateurs and hoteliers, particularly in the Rideau Valley/Rideau Lakes sub-region, to upgrade existing properties or establish new properties to meet growing market demand.

Long-haul travel to Ottawa and Kingston has increased substantially. Montreal and Toronto-based tour operators routinely offer package tours of the Corridor's marquee arts and heritage offerings. No longer in the shadow of either Montreal or Toronto, the Rideau region has joined the mainstream of Ontario long-haul package travel.

FIT travel to the Corridor has also increased markedly, particularly among Americans originating in the Great Lakes and New England states. Profiled extensively in travel publications and web sites in these regions and beyond, the Corridor has brought about a significant increase in U.S. visitations, as well as visitations from abroad. The UNESCO designation of the Rideau Canal as a World Heritage Site has elevated the recognition and profile of the Canal as an international heritage treasure.

Within the jurisdiction of the Corridor, the economic impacts attributed to cultural tourism have engendered a new political willingness on the part of local governments, the Province of Ontario, and the Government of Canada to invest in the Rideau's cultural assets. As a result, the quality and variety of the Corridor's cultural experiences has increased substantially, particularly in the Rideau Valley/Rideau Lakes sub-region. Experiences initially deemed not ready for market (and therefore excluded from the first iteration of the Corridor marketing campaign) have been capitalized and developed as tourism assets. Of note, civic governments in both Ottawa and Kingston have increased their investment in their cultural assets well beyond current levels. A variety of agri-tourism assets have also been developed to capitalize on the opportunity that the Corridor affords.

A range of marketing vehicles, promotions, and communications strategies facilitates the visitor encounter with the Corridor. Along the Rideau, visitor information centres highlight Corridor products, visitor guides profile Corridor offerings, and there is a high level of visibility for the Corridor in hotels, motels, and restaurants throughout the region. Outside the region, the tourism marketing vehicles of Ottawa and Kingston, as well as Ontario's tourism guides, the CTC's tourism publications, and the Corridor's own print vehicles and web site, have successfully penetrated the Corridor's tourism markets.

Above all, the visitor experience of the Corridor is one of quality and authenticity. The Rideau Cultural Heritage Corridor is a success story in cultural tourism development, and serves as a model for like initiatives elsewhere in Ontario and Canada.