

2017

GATEWAYS & DESTINATION COMMUNITIES



NORTHERN ONTARIO
**GATEWAYS & DESTINATION
COMMUNITIES TOURISM PLAN**



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Priorities for Tourism in Northern Ontario

With a vision of building a unique and distinctive tourism destination wherein high quality products and experiences resonate with consumers, entrepreneurship is valued, and tourism provides local, regional and global connections for the entire region, Tourism Northern Ontario (TNO) has established a mission designed to grow tourism in the north.



Mission

Tourism Northern Ontario will take a leadership role to strategically guide and champion growth in Northern Ontario's tourism industry, through strong communication, collaboration and partnerships with industry.



Governed by its funding agreement with the Ministry of Tourism, Culture and Sport (MTCS), Tourism Northern Ontario is contracted to enhance services in the following six pillars of tourism.

- 01 Governance & Administration**
- 02 Product Development**
- 03 Marketing**
- 04 Workforce & Industry Training**
- 05 Investment Attraction**
- 06 Partnership**

TNO Strategic Plan 2017-2020

TNO's activities under each of the six pillars of tourism are steered by strategic objectives, which are outlined in detail in the *Tourism Northern Ontario 2017-2020 Strategic Plan*. Objectives related to each of the pillars are as follows:

01 Governance & Administration

- Enhance organizational excellence related to board policies, procedures and provincial conflict of interest policies
- Ensure roles and responsibilities are effectively allocated, adhered to and reviewed
- Ensure service contracts with outside organizations reflect TNO mandate
- Establish quantifiable performance metrics with clear targets across all pillars to ensure TNO strategic efforts are translated into improved regional performance
- Continue to expand awareness of TNO and its activities within existing and new stakeholders groups
- Improve capacity for communication and outreach across Northern ON and develop advocacy position on key issues

02 Product Development (including research)

- Implement an experience shift, focusing on best bet products and experiences
- Implement TNO wayfinding strategy and initiate visitor information centre training
- Implement a quality shift, building consistent quality offerings and customer service
- Continue efforts to translate product development and target market research into action and track results
- Develop and implement a strategic research plan to track tourism business performance

03

Marketing

- Align and coordinate programs/ tactics common to all sub-regions and encourage collaborative marketing of products and experiences intra-regionally
- Refresh and implement new 5 year marketing strategy with Ontario Tourism Marketing Partnership Corporation's (OTMPC) northern office
- Ensure customers are easily connecting with Northern Ontario operators through appropriate marketing vehicles

04

Workforce & Industry Training

- Work in collaboration with regional partners to leverage funding resources and implement workforce training plans
- Build TNO's resource role to educate stakeholders on training opportunities across the region

05

Investment Attraction

- Build the bridge to connect Northern Ontario's investment community partners and funding agencies and encourage investment attraction across the region

06

Partnership

- Continue to build long term relationships with industry partners, focus on projects that show progress beyond marketing, and increase available partnership funding for TNO



Marketing Strategy 2017-2020

Key issues outlined in the *Strategic Direction for Marketing Tourism in Northern Ontario 2017-2020* prepared in conjunction with OTMPC, as they relate to product development for Northern Ontario include:

- The need to position Northern Ontario's unique experiences as the key element of the offer;
- The need for alignment, collaboration and effective planning and partnerships between RTOs, DMOs and OTMPC as well as northern tourism stakeholders to create marketing strategies, programs and partnerships that increase visitation and spending;
- The need to continually improve and adapt existing Northern Ontario tourism products, targeting avid and niche travellers with a consumer's first philosophy;
- Prioritizing Northern Ontario's geographic markets, specifically focusing on travel corridors of the Great Lakes/near border U.S. states and domestic Ontario;
- Continue to invest in research and monitoring of consumer and market conditions;
- Invest in travel trade and group tours that connect with Signature Experiences;
- Leveraging meetings and conventions as connected back to business tourism, in relationship with Gateways and Urban communities; and
- Utilize Northern Ontario's competitive advantage of accessible, pristine outdoors and wilderness.

Marketing efforts will focus around:

- Improved distribution and engagement of traditional media approaches, including avid oriented consumer shows, media marketplaces and media relations which will generate and leverage stories for digital outlets, focusing on earned media stories;
- Investment in digital distribution and engagement, working to align content from traditional media paths utilizing metrics, influencers on targeted tactics focused on specific consumer segments;
- Emphasizing perceived distance to market (visitor's travel distance to get to Northern Ontario) as an opportunity to explore and have a variety of experiences along the way; and
- Enhanced measurement and ROI tracking measures in place.

Building upon the *2012-2017 Strategic Direction for Marketing*, the 2017-2018 Tourism Northern Ontario marketing focus will establish TNO's role as a leader in marketing of Northern Ontario aligning with the sub-regions, region and OTMPC. TNO's implementation plan prepared in response to the Strategy outlines three areas of focus:

- 1 Strategic planning, implementation, performance and reporting.
- 2 Supporting destination brands at the provincial, regional and sub-regional levels.
- 3 Marketing priority products & experiences:
 - » **Angling & Hunting**
 - » **Cultural & Heritage**
 - » **Gateways & Urban Communities**
 - » **Nature & Adventure**
 - » **Touring**

Utilizing the key foundational elements outlined in the Marketing Strategy, the TNO 2017-18 Marketing and Action Plan calls for:

- Implementation of a pan-Northern initiatives under the "consumer first" philosophy of seamless borders for the visitors, while supporting destination brands and marketing;
- Working closely with OTMPC early in the planning cycle for the six priority products and experience areas;
- Working within Provincial branding activities to provide pan-Northern "lure" pieces to drive consumer planning; and
- Engaging customized tactical service agreements under multi-year contract to ensure consistent implementation of TNO's marketing plan.



TNO Product Development Plan & Research

Tourism Northern Ontario has taken a priority approach to research in the last five years and has focused its efforts by defining strategic priorities based on this research. This strategic approach has led TNO to focus on creating quality visitor experiences through both quality and culture shifts in the Northern Ontario tourism industry. This focus has led to a reallocation of resources, placing more effort on product development and moving resources from the more traditional marketing practices with the forethought of creating a stronger more powerful tourism region in the long run.



¹ Research Resolutions & Consulting, Overview of Tourism Opportunities for Northern Ontario (RTO13), July 2014.

Research summaries completed for TNO by Research Resolutions & Consulting provide a situation analysis with an in depth look at the market and its size in Northern Ontario.

The reports focus on the following areas:

- North American Motorcycle Tourists (2014)
- North American Hunters (2014)
- Attraction Tourists (2014)
- Festivals & Event Tourists (2014)
- Snowmobile Tourists (2014)
- High Yield Nature/Outdoors Tourists (2013)
- High Yield Anglers (2013)

When the above research reports are compared in the summary report *Overview of Tourism Opportunities for Northern Ontario*, the following findings are drawn¹:

- The outdoors is a salient if not core element in the lure of Northern Ontario for tourists in each segment.
- Many Canadian tourists are near locals who billet with friends and relatives, stay in their private cottages or in campgrounds in Northern Ontario. Conversely, American tourists in each segment tend to rely on paid roofed lodging during their stay.
- Almost by definition, niche markets tend to be relatively small. For example, the markets for motorcycle touring and hunting are more limited than the markets for festivals and events or attractions.
- Some activities offered in Northern Ontario are more apt to be the reason for taking a trip whereas others tend to be one-of-many activities a tourist engages in during a trip driven by other purposes. Fishing, hunting and motorcycle touring are segments with strong motivational elements whereas festivals and events or attractions more commonly provide tourists with things to see and do on a trip taken to see friends and relatives or for general pleasure purposes.
- The physical realities of distance from major population centres, limited transportation corridors and climate restrict the size of potential markets for Northern Ontario.



1.3 » TNO Product Development Plan & Research

The *Northern Ontario Product Development Strategy*, also completed in 2014 examined not only current tourism products that were available, but also experiences that were under development and future product opportunities. It matched these experiences with priority markets to determine where Northern Ontario should focus its product development efforts in the coming years as follows:

PRIMARY FOCUS	SECONDARY FOCUS	TERTIARY FOCUS
Fishing	Motorcycle Touring	Boating/Great Lakes Cruising
Nature & Adventure	Hunting	ATV
Auto/RV Touring		Snowmobile
Gateways & Urban Communities		Aboriginal

Recommendations in the report not only focused on the tourism experiences in Northern Ontario, but encouraged an administrative shift to focus more resources on product development and increasing the quality of available experiences.

As a result of recommendations in the *Product Development Strategy*, six Northern Ontario Product Development Committees were formed in 2015. These teams aid and advise Tourism Northern Ontario on the enhancement and development of their product area in Northern Ontario.

Gateway & Destination Communities Tourism – the Current Context & Research Findings

Case Studies



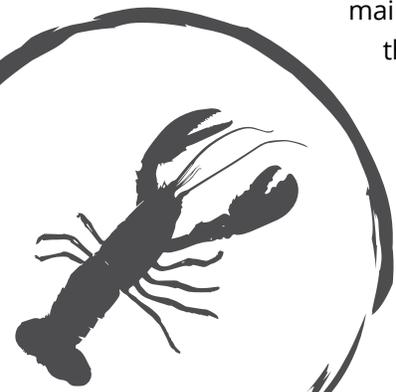
St. John's, NFLD – Gateway to the edge of the continent

Leveraging 'local flavours' is at the heart of St. John's (and the provincial tourism) strategy to get people engaged in authentic local experiences in small communities before continuing their adventure throughout the island. The core trip motivators in Newfoundland often involve outdoor attractions such as whale and wildlife watching, trail hiking, boating, fishing, remote hunting, geology, and experiencing National Parks and heritage sites.

St. John's has positioned itself as the main gateway community to these outdoor experiences and international transportation hub (via air, land and ferry travel options). They leverage the fact that thousands of

visitors come through their doors annually on route to other destinations by providing easy layover (or trip extension) ancillary supporting tourism sites you must do while in St. John's. These include the vibrant downtown core for food, music and cultural 'screeching in' ceremonies, historic Signal Hill, Cape Spear lighthouse tours and local history museums.

Experiences to bookend your time in St. John's before or after your travel to the rest of province include scenic drives, downtown festivals, nearby ecological reserves, cultural and interpretive sites and a live coastal music scene. St. John's leverages its ability to provide visitors with transportation and visitor amenities while in close (or direct) proximity to wildlife, icebergs and the ocean.



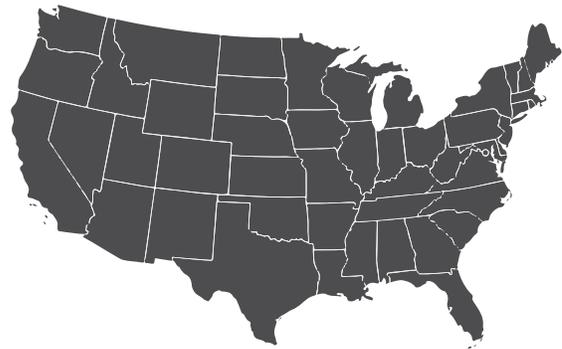


Main Streets America – How to build a destination community program

Main Streets America is a program built by the National Trust for Historic Preservation Foundation and runs throughout the United States. This comprehensive downtown revitalization program works to facilitate, support, coordinate at the local, state and national level, expertise to improve downtowns throughout the United States to increase vitality, tourism visitation and economic stability of its recognized communities.

The program utilized a designed, systematic and coordinated framework to implement downtown revitalization efforts. Since the program's inception in 1980, more than

2000 local communities have taken part, which aggregately has stimulated \$65.6 billion of new local economy investment, created over 550,000 net new jobs and rehabilitated over 260,000 buildings.



The program effectively makes communities more livable for residents and attractive to tourism. It essentially uses an expanded version of a 4-step program:

- 1 Organization (at the community level with stakeholders);
- 2 Economic development (including product development, involving research and criteria based assessment/analysis);
- 3 Integrated design and branding (for community improvement plans, infrastructure, community programming and physical streetscaping/ buildings); and
- 4 Marketing and promotion (community and tourism based).

The program framework has integrated impact and measurement tools to ensure steps taken can be measured, assessed and matched to targeted research. This helps position the program for ongoing success, even as industry, travel and sustainability trends change.

Current Provincial Focus on Gateways & Destination Communities

The OTMPC's *2017–2020 Strategic Direction for Marketing Tourism in Northern Ontario* indicates that the province will prioritize positioning Northern Ontario's competitive advantage of accessible, pristine outdoors wilderness in marketing. They've noted that this can occur in multiple ways with differentiated product targeted at attracting different consumer segments including direct linkages to gateway and destination communities.

Utilizing previous research such as TNO's 2014 *Product Development Strategy, OTMPC's Strategic Direction for Marketing Tourism* also reiterated the need to continually improve and adapt existing ancillary tourism products to suit a changing marketplace.

These supporting community-based tourism assets include:

- **Festivals/ Events**
- **Attractions**
- **Sport Tourism***
- **Meetings/ Incentive Travel *²**

Provincial marketing programs currently offered through the OTMPC will be important for gateway and destination communities in Northern Ontario to leverage, including the Ontario Signature Experiences (OSE), Tourism Industry Partners Program (TIPP) and OTMPC's Northern Partnership Program.

Based on the workplan that follows, destination communities may benefit from exploring past provincial initiatives such as the *Premier Ranked Program for Destination Tourism* created by the Ministry of Tourism, Culture and Sport and current provincial initiatives that support the development of community assets related to festivals, events and attractions.

Celebrate Ontario is a provincial program offered through the Ministry of Tourism, Culture and Sport and it works to support

new or existing Ontario Events and Festivals through investment specifically targeted to event enhancements, sustainability and marketing to increasing tourism, stimulate local economies and create employment opportunities. They provide funding for event and festival improvements, enhancements and sustainability developments through Celebrate Ontario Grants. In 2016, the Province of Ontario invested \$15.3 million (in grants) to support 200 festivals and events across Ontario.³

² *Although meetings, conventions and sport tourism is not currently a priority for OTMPC, Meetings and Conventions and Sports Tourism will continue to be a priority for Gateway and Destination Communities in Northern Ontario. Business travellers represent an additional consumer opportunity to extend meeting stays for leisure activities, spousal programs and partnering with major city destinations for pre and post conference opportunities. Excerpt from the 2017-2020 Strategic Direction for Marketing Tourism in Northern Ontario document.

³ <https://news.ontario.ca/mtc/en/2016/04/ontario-supporting-200-festivals-and-events.html>

Festivals and Events Ontario is a large-scale not-for-profit organization focused on the growth and sustainability of the festival and event industry in Ontario. This organization is supported by the province of Ontario and works closely with them to increase the profile, sustainability and economic impact of festival and events throughout the province.

Additionally, many of the casinos operated or proposed by the Ontario Lottery and Gaming Corporation located in urban centers in Northern Ontario, are other entertainment attractions directly connected with gateway communities.



Northern Ontario's Current Gateway & Destination Communities' Context

Northern Ontario communities play three primary tourism roles:

- 1 They are the staging ground for broad outdoors and rural experiences as well as transition zones upon return;
- 2 They act as destinations in and of themselves-as regional commerce hubs, hosts to sport tournaments and events (regional to international), locations for meetings and conventions, host locales for major festivals and events and a place for urban getaways for the regional traveller; and
- 3 They are stops on touring routes that include Lake Superior Circle Tour, cross-Canada tour road trips and sub-regional tours in and around the major cities⁴

⁴ Number 3: Stops on touring routes has been addressed in the Auto/RV touring routes Product Development plan and will not be detailed in this work plan.



Gateway Communities

Gateway communities are considered communities that are in close proximity to key trip motivators or major tourist attractions such as national parks or wilderness areas. They are transition zones to outdoor recreational assets and key trip motivators such as angling, hunting, snowmobiling, touring, camping, boating, as well as service areas to other smaller Northern Ontario communities. These communities provide amenities for the visitor including accommodations, food, gas and services

to support the demand for neighbouring attractions. This economic function is often integral to the local economies and act as transportation linkages to important staging areas.

Gateway communities are particularly attractive for those market segments seeking urban amenities upon arrival, prior to or at the end of their Northern Ontario experience that focuses on another key product focus area (i.e. angling, nature & adventure etc.)

Destination Communities

Destination communities have a tourism demand generator or a critical amount of tourism assets within their own communities that make visiting their community attractive to the consumer. In this case, both urban and rural communities can be or become destination communities unto themselves should they have a key trip motivator for consumers within a centralized geographic location.

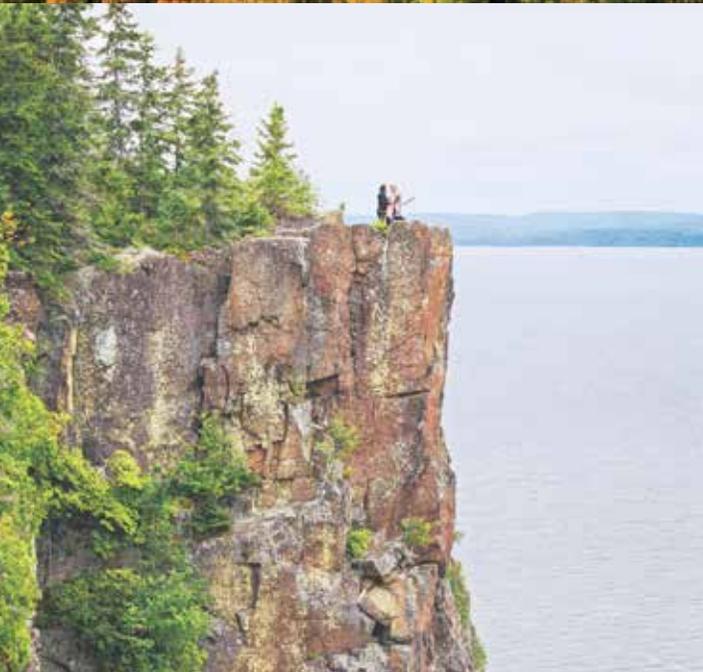
Destination communities use other tourism assets and experiences (outside of key trip motivators) in their offer in an effort to attract and retain visitors. These elements include festivals and events, attractions, culinary experiences, sport tourism and business and incentive travel.

To understand the current context for gateway and destination community tourism, three reports completed by Research Resolutions were reviewed.

- *Tourists in Northern Ontario's Major Urban Centres: A Situational Analysis* August 2015
- *Festival and Event Tourists in Northern Ontario (RT013): A Situational Analysis* June 2014
- *Attraction Tourists in Northern Ontario (RT013): A Situational Analysis* July 2014

Additionally, considerations from the Northern Ontario Product Development Strategy were also reviewed and applied to both the context for gateway communities and destination communities. Please see [Appendix I & II](#) for summary information from these reports and meeting. A focus group session was held in 2015, to discuss the SWOTT and additional observations ([see Appendix III](#)). For more information on the Gateways and Destination Communities Product Development Committee, their role and purpose, please see [Appendix IV](#).





In relation to both gateway and destination communities, Northern Ontario currently benefits from:

- Improvements to amenities (hotel/ accommodation) underway in Timmins, Sault Ste. Marie and Sudbury include expanded capacity, updated layout configurations
- Local development enhancements specifically related to:
 - » Attraction revitalization- new capital improvements at Fort William Historical Park, Agawa Canyon Tour Train, Science North and Dynamic Earth, Ermatinger-Clergue National Historic Site, Sault Ste. Marie Canal Historic Site
 - » Waterfront development/redevelopment in Sault Ste. Marie, North Bay and Thunder Bay
 - » Expansion of linkages from urban areas to outdoors through Group of Seven product sites and supporting cultural facilities (art gallery of Sudbury expansion)
- Air transportation options by Air Canada, Porter and Westjet shortens travel time to the north and creates direct links from other cities to Northern Ontario gateway communities transitioning to outdoor attractions
- Geographic proximity and ease of access to natural resources including waterways, national and provincial parks, lakes and rivers



Gateway and destination communities were identified in the *Northern Ontario Product Development Strategy* as a primary focus due to the potential market match connections through culture, heritage, transition zones to outdoor recreation and links to build attractions as well as their initial point of contact between the visitor and the region. Within the strategy, the following recommendations were suggested:

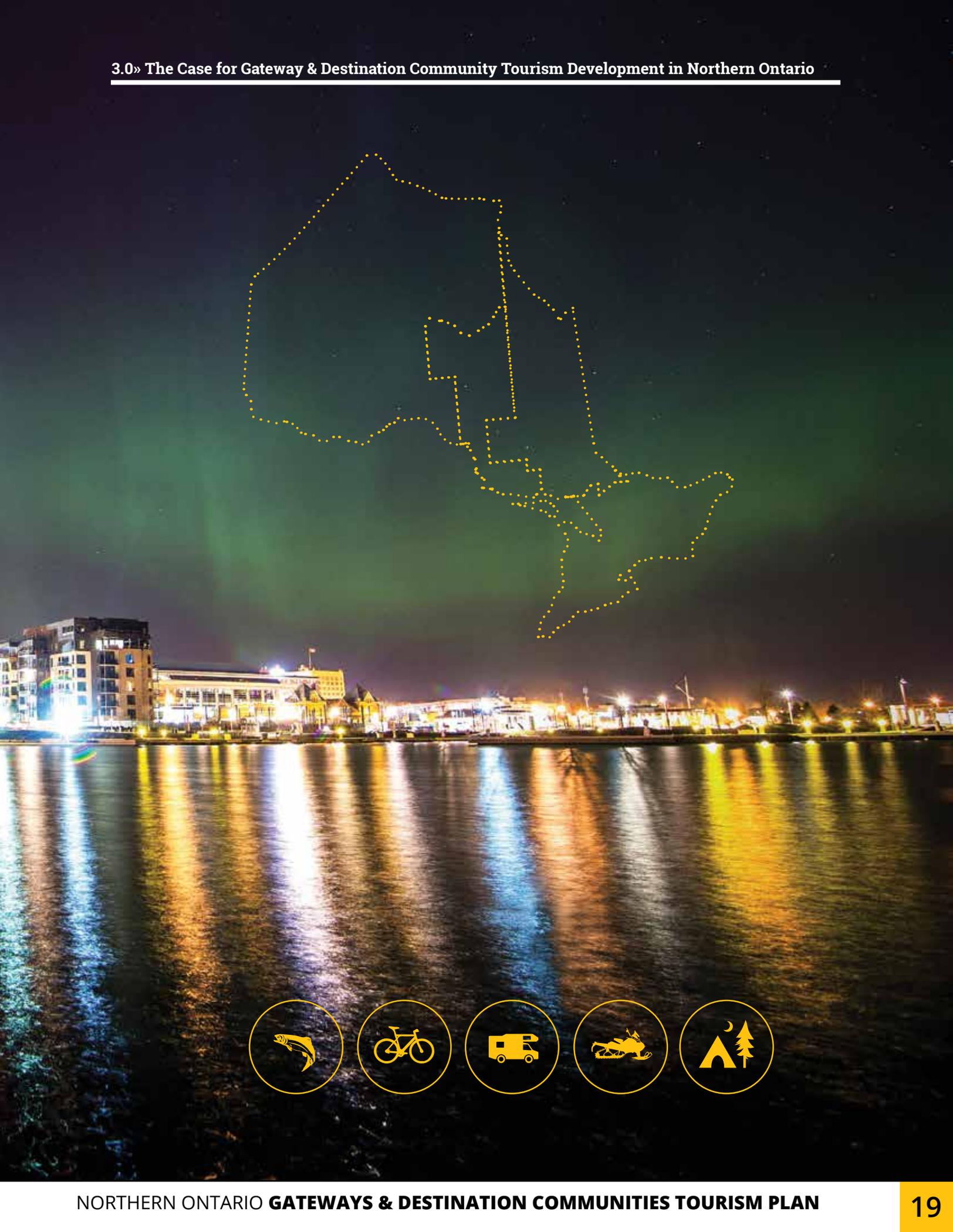
- 1 Support the development and enhancement of buyable supporting experiences
- 2 Link communities more closely to nature and outdoors as gateways and transition zones
- 3 Create and deliver an annual or bi-annual Northern Ontario sports tournament/event
- 4 Investigate creation of a 'true wilderness' adventure race/event
- 5 Continue to engage colleges, universities and other non-traditional stakeholders as venues and partners in the delivery of tourism experiences

The Case for Gateway & Destination Community Tourism Development in Northern Ontario

Several factors make gateway and destination community tourism a key product for further development in Northern Ontario:

- The *Northern Ontario Product Development Strategy* lists gateway and urban communities as a primary area of focus for product development;
- Alignment with the 2017 – 2020 *Marketing Strategy* which includes priority marketing of differentiated product targeted to priority travellers coming to and through gateway and destination communities;
- Gateways are an important staging area for other key product focus areas throughout Northern Ontario such as angling, cycling, touring, snowmobiling and outdoors/nature; and
- Destinations unto themselves have key trip motivators that can attract visitors.





Northern Ontario Gateways & Destination Communities Tourism Work Plan

It is recommended that the work plan for gateway and destination communities be broken into two sections pertinent to gateway communities, destination communities or both.

5 Steps to further Develop Gateway & Destination Community Tourism in Northern Ontario:

01

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STEP 1: Asset Inventory

It is recommended that the next step in the work plan for gateway community tourism product development in Northern Ontario is to complete an inventory of the existing tourism assets that focus on the linkages and hooks that can be made back to other key product focus areas.

As a place for visitors to stop or land while on route to their destination, gateway communities provide an important resource for refueling, stocking up with supplies, and in some cases, an overnight stay before reaching the intended destination. These activities unto themselves are not the primary trip motivator, but act as a byproduct of their extended travels.

To extend these stops, the asset inventory should focus on amenities and activities that may entice a visitor who is just passing through to extend their stay in a gateway community beyond the rest and refueling activities mentioned above. The tourism inventory should include items such as built attractions, outdoor recreational activities, cultural facilities, culinary events, and entertainment attractions such as sporting events, concerts, and festivals. The inventory should remain focused on linking the core travel motivation back to complimentary ancillary experiences they can have within the community. Additionally, supporting assets and experiences need to reflect local products, cultural and heritage connections, local cuisines and key attractions that are different than anything the consumer can get closer to home.

Timeline: Short to Medium term

The gateway community inventory should concentrate on the target market they serve and the assets directly related to:

- Cycling
- Snowmobiling
- Angling
- Nature & Adventure
- Auto/RV Touring
- Culture

Once the inventory has been created, it can be analyzed and utilized to:

- Understand supporting tourism assets in and around the community which visitors can participate in,
- Understand the timing gaps pertinent with festivals, events and seasonal attractions connected with gateway communities
- Understand the festival, events and attraction gaps for visitors participating in sport tourism and incentive travel
- Reviewed in conjunction with the target market visitor information available for each of the six outdoor priority travellers to determine potential tourism opportunities

The ultimate goal of the asset inventory is to provide a comprehensive list of potential complementary activities to create bookend/ packaged activities, encouraging extended length of stay.

Northern Ontario Gateway & Destination Communities Product Development Committee Role:

- Provide input and feedback to the proponent undertaking the asset inventory



STEP 2: Product Market Match and Market-Readiness Assessment

Utilizing the inventory created in step 2 for gateway communities, a product market match should be created to indicate the linkages between the target visitors coming for the six priority outdoor focus areas and the supporting 'tourism offers' available within the gateway community.

This will create the foundation for itinerary development and supporting ancillary items a visitor to the community can participate in. The product market match process should utilize the research summarized in each of the *TNO Product Development Work Plans* for

Timeline: Medium term

the six priority focus areas and the statics reporting provided by Research Resolutions to understand what items would appeal to each type of travel segment.

Once the product market match has been completed, the potential 'bookend' tourism offers need to be reviewed against a market-readiness assessment to understand the current state of the asset and if additional product development is needed before it's able to be packaged and included in gateway itineraries or saleable products to the consumer.





The market-readiness assessment should utilize a 'best-in-class criteria' developed for Northern Ontario specific for each sector (accommodation, food, events, etc.) to determine its ability to be successfully promoted to the target market.

For example, a sport fly fisherman has flown into Sault Ste. Marie from the western United States as he's enroute to a remote fishing lodge in Northern Ontario. He chose to fly into SSM because after he booked his lodge, he received collateral that encouraged him before or after his flight to try an urban fly-

fishing experience on the St. Mary's River in downtown Sault Ste. Marie.

The offer also included information about a local hotel, which offered a catch and stay package complete with freezer and fish cleaning facilities. This bookend offer was enticing enough to get him to extend trip by an extra day in the city.

Opportunities for product packaging may appear and provide prospective partnerships between tourism operators and tourism stakeholders.

Northern Ontario Gateway & Destination Communities Product Development Committee Role:

- Provide input and feedback to the proponent undertaking the market-readiness assessment and recommendations for potential products for inclusion as matched to target traveller segments
- Provide input and feedback to the proponent undertaking the development of the best-in-class criteria for each asset sector
- Provide input and feedback to the proponent undertaking the review and analysis of product development gaps in relation to priority segments within each gateway community and future enhancement opportunities
- Provide leveraged support and advocacy for future enhancements at the local, regional and provincial levels (as applicable)

01

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STEP 3: Development of a Northern Ontario Destination Communities Program

It is recommended that TNO provide regional level support for local communities in their destination community capacity through the development and creation of a *Northern Ontario Destination Community Program* framework.

This program would work to provide local communities with the tools to assess their destination community's capacity. Tools should support communities trying to determine:

- Their top demand generators and supporting local assets;
- The market-readiness of the identified assets;
- How to combine key demand generators with ancillary offers to create a critical mass; and
- How these offers align with travel motivations/patterns of the priority targeted travellers.

Additionally, the program could include support mechanisms including the existing TEN suite of tools, or matching funding to encourage and stimulate additional local investment to create true best-in-class destination communities.

Timeline: Long term

Past programs to review when developing the framework for a Destination Community Program include the *Premier Ranked* program offered by the Ministry of Tourism, Culture & Sport 2001-2008, the currently active Main Streets America Program and the Tourism Nova Scotia Destination Development Community Tourism Planning Guides.

Much of this work will need to occur at the local and municipal level, but where TNO can play an integral role is in the creation of an overarching program framework and tailored community support tools to increase the capacity and appeal of destination communities throughout Northern Ontario.

TNO can additionally continue with detailed research and analysis related to regional visitors and specific consumer profile types so that local communities (unable to undertake this research themselves) can create buyable offers to targeted consumers for their destination community.

Northern Ontario Gateway & Destination Communities Product Development Committee Role:

- Provide input and feedback to proponent undertaking the development of the *Northern Ontario Destination Community Program Framework*



STEP 4: Partnership Development

If community and destination partners follow the processes as outlined above, the recommendations for improvements may align with TNO’s partnership program priorities.

Partnerships are essential for both gateway and destination communities to leverage.

Partnership with TNO is needed to support identified buyable tourism offers through marketing and promotion strategies at a regional level linking back to gateway communities. This will increase the appeal of the offer to travel to the region for outdoor experiences and potentially, increase the length of stay and spend in each community- and the north as a whole.

Increased destination development at the local community level through partnership funding, training tools for operators and product development support will collectively benefit the region as a whole by increasing the quality, depth and variety of experiences available to Northern Ontario visitors.

Timeline: Long term

In addition to these partnerships supporting local tourism assets, partnerships are needed for large-scale planning and product development initiatives connected with:

- Annual Northern Ontario sports tournaments
- Wayfinding
- Product expansion
- Workforce development and training connected with industry- business conventions
- Events sustainability (funding models, volunteer run)
- Provincial festival and event funding applications
- Engagement with colleges, universities for workforce development opportunities

Northern Ontario Gateway & Destination Communities Product Development Committee Role:

- Provide input and feedback to proponent undertaking the development of the *Northern Ontario Destination Community Program Framework*



STEP 5: Support for Strategic Product Development Research

It is recommended that TNO consider supporting gateways and destination communities in their development of strategic research surrounding potential new, targeted products or experiences. This strategic research should investigate the potential opportunity and return on investment of the experience while aligning with the above recommendations for gateways or destinations. For example, the strategic research could investigate the possible development of a new attraction, or a festival or event.

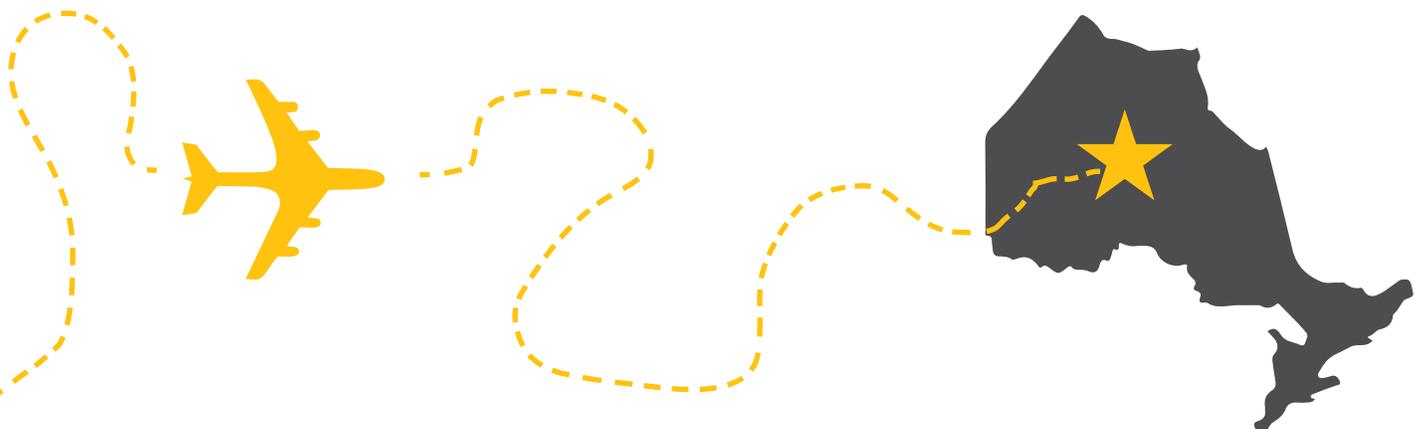
For gateway communities, the potential research should relate to or support a key trip motivator that is the reason that visitors use the community as a gateway. (For example, a community that acts as a gateway for snowmobile touring could undertake strategic product development research surrounding the possible creation of an annual snowmobile event).

Timeline: Long term

Destination communities will benefit from investigating possible new tourism opportunities that relate to their current demand generators, or expand their offer. (For example, a destination community that currently has a family attraction as a demand generator may benefit from strategic research surrounding the development of a waterpark as a complimentary attraction, designed to extend stays in the community and to become a demand generator unto itself.)

Northern Ontario Gateway & Destination Communities Product Development Committee Role:

- Provide input and feedback to TNO in their support of the community's research.





APPENDIX I:

Gateway community research notes

Tourists in Northern Ontario's Major Urban Centres: A Situational Analysis August 2015 indicated:

- That over the year almost one million overnight tourists spent nights in Northern Ontario's two largest cities - Greater Sudbury and Thunder Bay.
- The majority (**8-in-10**) of tourists to urban cities within Northern Ontario live within the province. This proportion is larger than the extent for Ontario as a whole (**71%**). Conversely, they draw a smaller share of American tourists (**10%**) than does the region overall (**16%**).
- Visiting friends and relatives (VFR) is a major travel motivation for Northern Ontario urban communities and accounts for approximately **49%** of overnight visitation to Greater Sudbury and Thunder Bay. Additionally **1/3** of these trips are pleasure related.
- This large influx of VFR tourists in urban centres has implications on volume of unpaid lodging and increased demand on attractions. In addition to the direct contribution VFR tourists make, their hosts also spend additional money in local economies at restaurants, attractions and events.
- Business and incentive travels tend to do the reverse of VFR and heavily rely on roofed accommodation (**82%**). In addition to filling hotel/ motel rooms, business travellers spend more than typical tourists to Greater Sudbury or Thunder Bay (**\$93 vs \$71**). Regional competition and changing digital technologies means urban communities throughout Northern Ontario are competing with themselves as well as a changing industry.
- Both business travel and VFR travel are not weather dependent and remain relatively consistent throughout the entire year.
- The north's big city tourists make substantial contributions to all types of tourism businesses including roofed lodging, restaurants, fuel, groceries, entertainment, retail and additional transportation sectors.





As noted in the *Northern Ontario Product Development Strategy*, urban gateway communities tend to be dominated by branded hotels. There is a general lack of 'character accommodation' such as urban inns and a critical mass of B&Bs in these major cities, which may be a gap or weakness for some market segments. A different type of competition comes from other industries such as mining and forestry that fill hotel rooms, displacing tourists.



APPENDIX II:

Destination community research notes

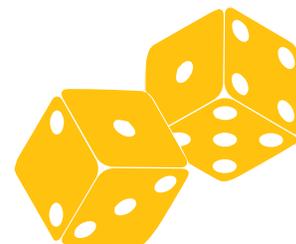
*Festival and Event Tourists in
Northern Ontario (RT013):
A Situational Analysis June
2014 indicates:*

- That festival and event tourists are more likely to be domestic residents travelling to see friends and relatives and will participate in an event or festival, rather than the event being the primary core trip motivation. When this occurs, event visitation also increases as guest and host usually attend;
- The events and festivals currently in Northern Ontario support local economies and communities but may not be large enough or have a critical mass to become a sufficient draw to pull tourists to Northern Ontario;
- The most popular festivals or events for these tourists were spectator sporting events, following by concerts, local fairs and visitation to a historic site. **2/5th** of the market engaged in some form of outdoor activity in addition to their primary trip activity;
- Festival and event tourists spend longer in the region compared to typical overnight visitors (4 nights vs 3.5 nights), however the majority of nights (**73%**) utilize unpaid lodging as connected with VFR accommodations.



***Attraction Tourists in Northern Ontario (RT013):
A Situational Analysis July 2014 indicates:***

- That the majority of attraction-based visitors are domestic residents of Ontario, **1/5th** from within the region. They typically stay in unpaid lodging (private homes and cottages) followed by roofed accommodation then camping. Within true attraction tourist, these visitors typically participate in:
 - » History/ historic site attractions (**57%**)
 - » Art Gallery/ Cultural attractions (**37%**)
 - » Casino/ Entertainment attraction (**24%**)
- However, **2/3** of attraction visitors noted that during their trip, they completed at least one outdoor activity, even if that was not the primary motivator for their travel. This included Park attractions, boating or camping.
- **1/3** of Northern Ontario Attraction Tourists are in the region in order to visit friends and relatives. Attraction tourists spend the same amount of time as typical overnight tourist in the region (3.5 night avg) however they spend more **1/3** total more (**\$680**) per trip.



APPENDIX III: SWOTT Analysis

During the Northern Ontario Tourism Summit held in Sault Ste. Marie in November 2015, a gateway and urban communities focus group session was held with 11 participants in attendance. Their input regarding questions posed about trends and opportunities was as follows:

+ STRENGTHS

- + Waterfront developments have been undertaken or are under way in Thunder Bay, Sault Ste. Marie, and North Bay. Thunder Bay waterfront development includes a \$25 million re-build of its art gallery.
- + Group of Seven product development is currently in process in 13A & B. The urban areas act as both gateways and hosts for these experiences. Built attraction developments of interest to this experience development include the expansion of the Art Gallery of Algoma in Sault Ste. Marie and the re-build and renaming of the Art Gallery of Sudbury as the Franklin Carmichael Art Centre.
- + Long term plans to develop casinos across Northern Ontario have been announced.
- + Gateway and urban communities act as important destinations for both shopping and medical tourism for visitors and residents from northern/remote communities in Northern Ontario.

- WEAKNESSES

- Dominated by branded hotels, there is a general lack of 'character accommodation' such as urban inns and a critical mass of B&Bs in these major cities, which may be a gap or weakness for some market segments.
- Communities that act as gateways have different product development and marketing needs than those that are destinations. This distinction must be recognized as product development advances.



OPPORTUNITIES

- Support for development and enhancement of ancillary experiences that reflect local products and cultural heritage connections such as art and artisans, northern 'cuisine' reflecting a particular area (e.g. Finnish food in Thunder Bay area) to extend stays, encourage stops and increase spending and to build a strong sense of place.
- There may be an opportunity to create and deliver an annual or bi-annual Northern Ontario sports tournament/ event to attract out of province participants that rotates between major urban cities.
- Consider creating a new "true wilderness" adventure race/ event that is authentic to Northern Ontario's natural assets to attract active adults and/or millennials, with a finish and end in urban centres for preparation, as well as post-competition for banquets and awards. The race itself would access natural resources (similar to Yukon Quest that starts in Whitehorse, Yukon one year and Fairbanks, Alaska the next -route is reversed each year and finishes in the other location).
- Continue to engage colleges, universities and other non-traditional stakeholders as venues and partners in the delivery of tourism experiences.
- Position and package Northern Ontario cities as more accessible and preferred destinations to those adverse to visiting major, busy urban centres for getaways of all types.
- Link communities more closely to nature and outdoor offers as gateways and transition zones, particularly for those market segments seeking urban amenities before or after their wilderness experience.



THREATS

- The cities compete with each other to some degree for meetings, conference and competitive bidding for sport events.
- A different type of competition comes from other industries such as mining and forestry that fill hotel rooms, displacing tourists.
- Commitment to tourism can fluctuate in urban centres based on make-up and interest of municipal councils, other commercial/ industrial priorities (mining, forestry etc.) and the strength of the region's tourism sector. This uncertainty can result in short term decision-making, gaps in product development and marketing and sales efforts that have a longer-term impact.
- Built attractions in Northern Ontario must consider distance from market and the ability to sustain the attraction with visitors and multiple revenue streams in order to be economically viable.





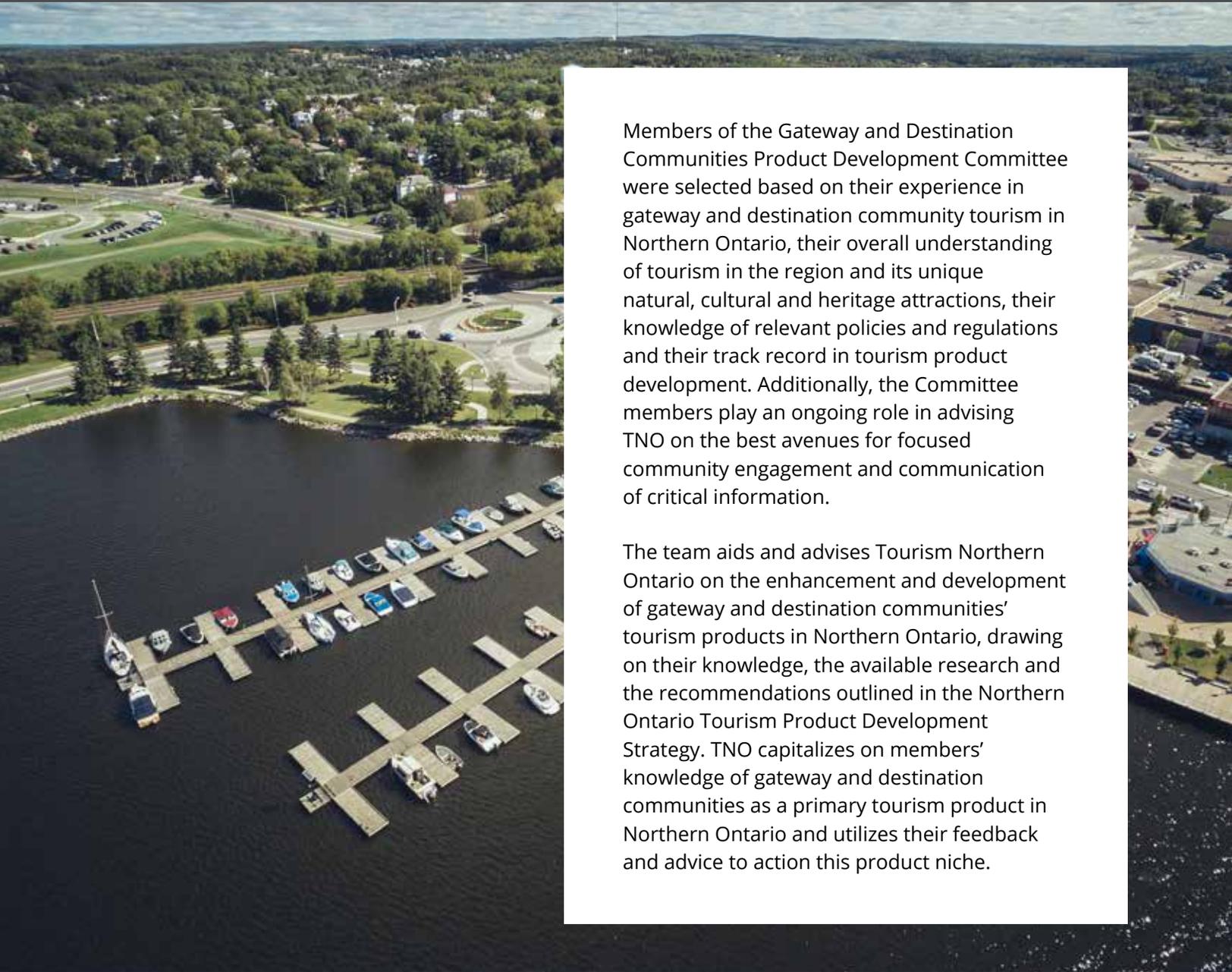
TRENDS

- Culinary tourism and the importance on farm-to-table movement.
- Visitors wanting the 'local' authentic experience.
- The importance of mobile/web-based booking systems for non-traditional accommodations and transportation such as Airbnb, Uber, etc.
- Increase of purchasing tourism products/ experiences online through booking systems, websites, etc.
- Increase in popularity of experience-based tourism. Experiential tourism is an outgrowth of a global movement toward experiential learning, whereby people create meaning through direct experience⁵.

⁵ Nature and Outdoor Tourism Ontario, https://noto.ca/info_for_your_business/experiential_tourism

APPENDIX IV:

Purpose of the Gateway & Destination Communities Product Development Committee



Members of the Gateway and Destination Communities Product Development Committee were selected based on their experience in gateway and destination community tourism in Northern Ontario, their overall understanding of tourism in the region and its unique natural, cultural and heritage attractions, their knowledge of relevant policies and regulations and their track record in tourism product development. Additionally, the Committee members play an ongoing role in advising TNO on the best avenues for focused community engagement and communication of critical information.

The team aids and advises Tourism Northern Ontario on the enhancement and development of gateway and destination communities' tourism products in Northern Ontario, drawing on their knowledge, the available research and the recommendations outlined in the Northern Ontario Tourism Product Development Strategy. TNO capitalizes on members' knowledge of gateway and destination communities as a primary tourism product in Northern Ontario and utilizes their feedback and advice to action this product niche.

Role of the Gateway & Destination Communities Product Development Committee

Team members use their wisdom, coupled with research, to support work undertaken by TNO with the purpose of attracting more visitors to Northern Ontario gateways and destination communities with the main objectives of offering a world class experience, resulting in tourists staying longer and spending more money.

They will also encourage activities that support the development of gateway and destination communities' tourism products that are complimentary and coordinate well with other product niches in a sustainable way.



Gateway & Destination Communities Product Development Committee Members

NAME	ORGANIZATION	TELEPHONE	EMAIL
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James Franks	City of Timiskaming Shores	705-672-3363 ext. 4137	jfranks@temiskamingshores.ca
Laurie Brownlee	Ontario Ministry of Tourism, Culture and Sport	705-564-3175	laurie.Brownlee@ontario.ca
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Paul Pepe	City of Thunder Bay	807-475-7246	ppepe@thunderbay.ca
Shawna Cole	City of Greater Sudbury	705-919-2374	shawna.Cole@greatersudbury.ca
Tanya Bedard	North Bay Economic Development Corp.	705-474-0400 ext. 2318	tanya.Bedard@cityofnorthbay.ca



RESOURCES:

2015 Tourism in Northern Ontario's Major Urban Centres: A Situational Analysis:
<https://tourismnorthernontario.com/wp-content/uploads/2016/09/RTO13-Major-Urban-Summary-Aug-9-2015.pdf>

Tourism Northern Ontario – Too Big to Ignore – VFR Tourists in Northern Ontario (RTO13) A Situation Analysis: <https://tourismnorthernontario.com/wp-content/uploads/2016/09/RTO13-VFR-Report-Final-May-25-2015.pdf>

Tourism Northern Ontario – Attraction Tourists in Northern Ontario (RTO13) A Situation Analysis: <https://tourismnorthernontario.com/wp-content/uploads/2016/09/RTO13-Attractions-Report-Final-July-26-2014.pdf>

Tourism Northern Ontario – Festival & Event Tourists in Northern Ontario (RTO13) A Situation Analysis: <https://tourismnorthernontario.com/wp-content/uploads/2016/10/RTO13-Festival-Report-June-10.pdf>

Tourism Northern Ontario – Tourists in Northern Ontario's Major Urban Centres: A Situation Analysis: <https://tourismnorthernontario.com/wp-content/uploads/2016/09/RTO13-Major-Urban-Summary-Aug-9-2015.pdf>

Strategic Direction for Marketing Tourism in Northern Ontario 2017-2020:
http://contentservices.tourismpartners.com/api/documents/6vO3ze4VpUuyFJ86_J4qWA/download

Celebrate Ontario:

<http://www.grants.gov.on.ca/GrantsPortal/en/OntarioGrants/GrantOpportunities/OSAPQA005140>

<https://news.ontario.ca/mtc/en/2016/04/ontario-supporting-200-festivals-and-events.html>

Festivals and Events Ontario: <http://www.festivalsandeventsonario.ca/>

Main Streets America: <http://www.mainstreet.org/>

Nova Scotia Tourism- Community Tourism Planning for Destination Communities:
<https://tourismns.ca/development/destination-development>

Newfoundland & Labrador Tourism: <http://www.newfoundlandlabrador.com/>

Additional Useful Resources:

- Premier Ranked program, Ministry of Tourism, Culture & Sport
- Ontario Culinary Tourism Alliance Industry Resources
- Francophone Tourism Product Development Guide, Ministry of Tourism, Culture & Sport
- Bienvenue en Ontario, Engaging the Francophone Visitor, Direction Ontario
- Various resources from Canadian Sport Tourism Alliance
- A Guide to Building Packages Handbook, OTMPC
- Selling Through Travel Trade manual, OTMPC



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