



destinationnorthernontario.ca

ONTARIO

LGBT+ Tourism Strategy

PHASE II: A PROPOSAL

Ontario 

Background

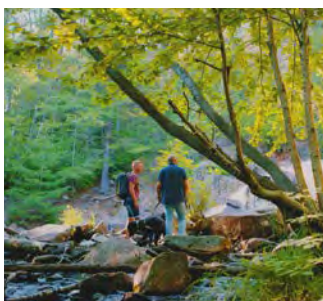
According to the Canadian Gay Lesbian Chamber of Commerce (CGLCC), LGBT+ travellers represent a major opportunity for recovery for our Canadian tourism industry. It stated that they outspend their mainstream counterparts at seven times the average trip expense. They rebound faster after industry shocks, being among the first segment to recover post-9/11 and SARS. Currently, 90% of them are seeking travel opportunities within Canada. The Canadian LGBT+ travel market is valued at over \$12 billion annually.

To enable Northern Ontario's tourism industry to capitalize on this significant opportunity, Destination Northern Ontario formed an industry-based LGBT+ Tourism Product Development Team in late 2020 and produced the Northern Ontario LGBT+ Tourism Product Development Strategy with input from its industry-based team in March 2021. The strategy was unanimously approved by the team that same month.

LGBT+ tourism is a priority of the Ontario Ministry of Heritage, Sport, Tourism and Culture Industries. In her COVID-19 recovery White Paper, Reconnecting Ontarians, Minister Lisa MacLeod stated that to develop a year-round, globally competitive suite of products, Destination Ontario would:

"...in partnership with the RTOs and other tourism organizations ... develop a plan to attract tourists to the province through our gateway cities – Ottawa and Toronto – and to Ontario's unique rural and remote tourism offerings. They will also be tasked with helping operators build a competitive and ambitious 365-day, year-round suite of products to ensure tourism opportunities in every Ontario season.

To remain globally competitive, we will create tourism trails to profile Indigenous, LGBT+ and Francophone tourism, enhance craft and culinary experiences, develop film and television, music, playhouse, and festival and event experiences. The Ministry invites all partners in all sectors of the Ministry to participate in this exciting opportunity."



In 2021, Destination Northern Ontario proposed to the Ministry to draw on the extensive groundwork undertaken to inform the Northern Ontario strategy to manage the creation of a broader LGBT+ Ontario tourism product development strategy. That proposal was approved and the deliverables within the proposal were completed.

The workplan consisted of the following steps, all of which were achieved:

- Develop and distribute invitation to participate in pilot project and send to RTOs, min. 4, max. 6 partners
- Set up steering committee
- Design survey on perceptions of LGBT+ friendliness/region
- Distribute survey link; engagement and outreach
- Partner engagement: Asset inventory and market-readiness assessment; digital needs assessment
- Tabulate and report on survey results
- Digital assets acquisition
- Identify training opportunities and deliver training
- Identify product development opportunities and marketing framework, minimum 4 trails/itineraries



The Case for LGBT+ Product Development in Ontario

LGBT+ travellers represent a major opportunity in recovery for our Canadian tourism industry post-pandemic.



During the pandemic, 90% of the LGBT+ market is seeking travel opportunities within Canada. They are seeking many of the travel experiences that Ontario has to offer, but they value one thing significantly higher than their mainstream counterparts: their safety, which may bode well for Ontario.

- LGBT+ tourism spending in North America is estimated at more than \$70 billion USD annually and globally it is at \$200 billion USD
- Spending in Canada specifically amounts to \$12 billion annually
- Estimates place the North American LGBT+ community at 30 million people
- Canadian gay and lesbian travellers spend nearly twice as much as other travellers and stay longer
- The LGBT+ traveller is loyal and tends to support destinations and operators who support the community and are committed to them
- Canada is the top travel destination for American LGBT+ travellers. Vancouver, Montreal and Toronto are top destinations. Ontario hosted 31% of trips within Canada
- The Canadian LGBT+ travel market remains relatively untapped. Destinations currently successfully marketing to these lucrative travellers, include Philadelphia, Pennsylvania, Atlantic City, New Jersey and Hudson Valley, New York.

WORK PLAN

Proposed LGTB+ Product Development Work Plan for Ontario

The North American case study research on what makes successful LGBT+ tourism strategies has identified four key categories for destinations to consider when pursuing LGBT+ market-readiness: engaged local community, unique products and experiences, dedicated investment and planning, and targeted marketing and promotions.

The following work plan has been developed considering these categories as well as from input from the Ontario LGBT+ Product Development Strategy Working Group and the insights gained during the pilot project. After the successful pilot project, it was clear there are several steps that are still required to further develop LGBT+ tourism products across Ontario.

5 Steps to Develop LGBT+ Tourism in Ontario:

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STEP 1: Asset Inventory & Market-Readiness Assessment

Guided by industry experts, the partner RTOs participated in an asset inventory and market-readiness assessment which yielded information on what products and services that appeal to the LGBT+ market are available in the communities and what steps need to be taken to enhance the offering. Tourism businesses that wish to take advantage of the LGBT+ market were identified. These operators will require training in order to maximize their appeal to this market.

Some RTOs identified the need to undertake a more in-depth audit for some of their communities.



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STEP 2: Address Future Training Opportunities

To make the Ontario experience inviting for the LGBT+ market, tourism assets that support the focus being pursued should be quality, market-ready establishments, experiences and events. Encouraging operators to take the necessary training, in partnership with others such as the Canadian Gay Lesbian Chamber of Commerce and its existing training programs will help to ensure operators are focused on the quality of their establishment and providing the best possible experience to travellers. Destination Northern Ontario through its training program, Tourism Excellence North, will continue to offer this training to the partners.





STEP 3: Identify Product Development Opportunities

In general, the LGBT+ traveller is looking for the same products and services as any other traveller. But that doesn't mean you shouldn't try to find ways to adjust your products or experiences to speak specifically to the LGBT+ traveller. Some examples include car rental companies waiving additional driver fees for same-sex partners or hotels offering his and his robes. In doing so, you are making your offering relevant to LGBT+ travellers as opposed to just selling them the same products you sell to everyone else...The LGBT+ market is not a homogeneous market, buying all of the same products, engaging in the same activities and travelling to the same destinations.

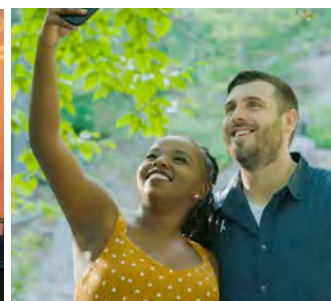
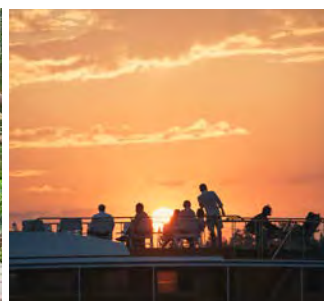
— *An LGBT+ Travel Market Guide & Tourism Development Toolkit, CGLCC*

During the pilot project, the goal of a minimum of four new products/experiences was achieved. The partners agreed that further coaching and training would be beneficial in assisting them to develop additional product that would appeal to this market.

According to the CGLCC, some examples of products and experiences that can be developed for LGBT+ communities and that would appeal to LGBT+ travellers include:

- LGBT+ festivals and events (Pride, ski and snowboard, culinary, film festivals, etc.)
- LGBT+ focused experiences with local and authentic storytellers
- LGBT+ focused group tours (walking, cycling, boat, bus and wine, etc.)
- LGBT+ focused outdoor adventures (group kayaking, SUP, ziplining, glamping, etc.)
- Mainstream festivals, events or experiences that offer LGBT+ targeted programming (such as LGTB+ tours and packages display).

Safety is a major concern for LGBT+ travellers when choosing their destination and, in light of this, Rainbow Readiness accreditation was a focus in the pilot and will continue to be in Phase II.





STEP 4: Leverage Partnerships and Advocate for Investment Opportunities

During the pilot phase, partnerships with Pride and other LGBT+ organizations including the CGLCC were formed as well as a partnership with Destination Ontario to provide video shoots for all the RTOs at no charge. We will continue to build on these partnerships and form other alliances as appropriate.

It is envisioned that there will be nine RTO partners in the second phase.

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STEP 5: Marketing and Communications

Perhaps the most important aspect when marketing to the LGBT+ market is segmentation. As highlighted in the LGBT+ travel market overview, there is not one market but several segments within LGBT+ communities. When completing a destination or business assessment, you will determine what products and strengths you have. Then, you need to identify what segment of the broader LGBT+ market is the best match for those products. You may choose to focus on the broader LGBT+ market, but it is recommended that you narrow the market down to some commonalities; for example, millennial gay men, older and active lesbians, LGBT+ families, etc. The more targeted you are, the better able you will be to focus your marketing efforts and deliver an experience that is a perfect fit.

— CGLCC Toolkit

Once product development has been completed, the experiences can be marketed. Authentic collateral such as photography was needed in all of the regions, supported by videography provided by Destination Ontario. As the assets gathered were focused on the summer season, fall and winter photography is still required along with videography if possible.



Timelines

 JULY 2022 - JANUARY 2023

Key Performance Indicators

1. Number of RTO and DMO partner staff trained in workshop(s)
2. Number of operators trained in workshop(s)
3. Number of operators/businesses who go on to become Rainbow Registry accredited
4. Number of assets identified as LGBT-ready/friendly
5. Number of assets that are identified as being near ready or planning to become ready
6. Number of products enhanced and new products developed
7. Number and kind of digital assets acquired

Budget

Digital asset development	\$	90,000
Asset inventory, market-readiness assessment	\$	60,000
Product Development training	\$	30,000
Project management	\$	20,000
Total	\$	200,000





111 Elgin Street, Suite 304, Sault Ste. Marie, ON, Canada P6A 6L6

T » 705.575.9779 | **F** » 705.575.9780 | **E** » info@destinationnorthernontario.ca | **W** » destinationnorthernontario.ca