

2017

# NATURE / ADVENTURE

NORTHERN ONTARIO  
NATURE & ADVENTURE  
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 US 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.



<sup>1</sup> 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 drawn<sup>1</sup>:

- 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.

# Nature & Adventure Tourism – the Current Context & Research Findings

## Case Studies



### **Kananaskis Country – Alberta**

Located in Alberta's Eastern Rockies to the west of the City of Calgary, the Kananaskis region includes vast mountains and foothills, and eight rivers which make up the majority of the flow of the Bow Watershed. The region hosts a variety of vegetation types, geological formations, wildlife populations and migration corridors, and topography. Its proximity to Calgary makes it an easily-accessible and heavily-used recreation area. In addition to being a recreational area and watershed, it also allows for resource activities such as timber harvesting, cattle grazing, and oil and gas extraction.

In 1978, the Government of Alberta established the Kananaskis region as a formal, major multi-use recreation area. A portion of the Kananaskis Region, (referred to as Kananaskis Country) makes up 40% of the total land area, is managed under provincial parks legislation. This area includes five provincial parks, four wildland provincial parks, one ecological reserve and several provincial recreation areas. It also encompasses the Canmore Nordic Centre, a world-class facility built for the 1988 Calgary Winter Olympics and Nakiska Ski Resort.

In 2012, Alberta Tourism, Parks and Recreation undertook an extensive management plan development process for Kananaskis Country Provincial Recreation Areas and Bragg Creek Provincial Parks (another park located close to the City of Calgary). The overall management goals for both provincial and recreational areas were:

- To provide overall management direction for the Kananaskis Country Provincial Recreation Areas and Bragg Creek Provincial Parks;
- To provide high-quality, safe, and enjoyable recreation experiences for visitors in well-designed and maintained facilities, as well as acting as staging areas to recreation opportunities on adjacent Crown lands;
- To support the development of healthy, sustainable tourism activities that complement park features and facilities, as well as nearby community initiatives;
- To protect significant natural, cultural, and scenic values within the areas; and
- To provide interpretation and educational opportunities at appropriate sites.<sup>2</sup>



### Elliot Lake – A Development Manual for a Community-Based ATV Tourism Product

In 2003, a community-based ATV tourism product model pilot project was created to support the developing tourism project in the community of Elliot Lake. The project was based on a shared-use trail system to maximize economic benefits to the community.

A manual was created and describes how to develop a community-based ATV tourism product, based on the process initiated by the community of Elliot Lake

in consultation with other communities. The report interpreted and extended the concept to incorporate “best practices” taken from general business planning strategies and community economic development models. It follows a logical process from general introduction of key concepts to pre-feasibility assessment to a business plan. It also incorporates sections on measurement and quality control.

<sup>2</sup> Kananaskis Country Provincial Recreation Areas and Bragg Creek Provincial Park Management Plan May 2012



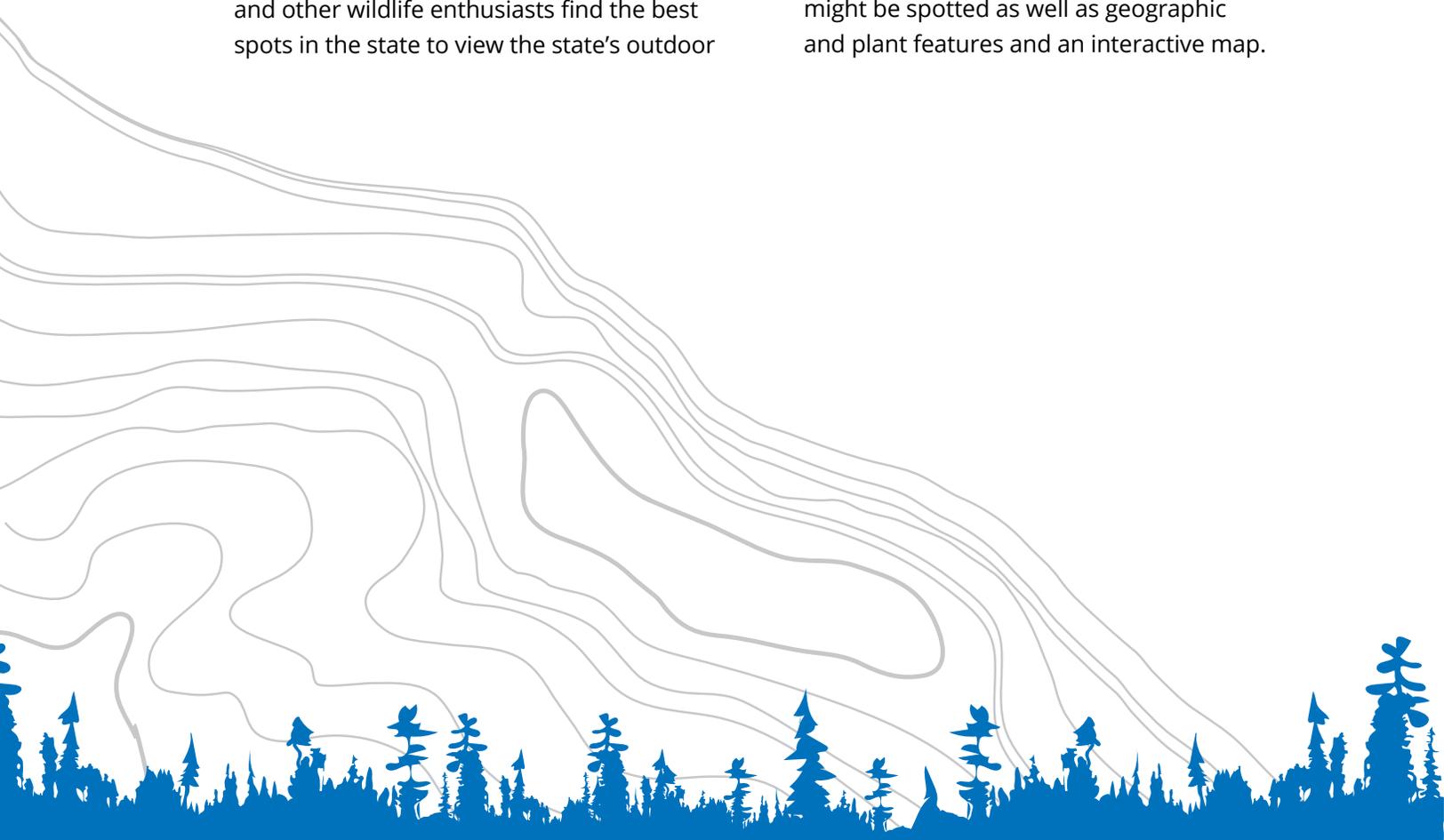
## Wildlife Trails of Texas

Texas is one of the nation's leaders in nature tourism and was the first state in the U.S. to build wildlife viewing driving trails that provide economic incentives for landowners and communities to conserve habitats while providing recreational opportunities for visitors. The Wildlife Trails of Texas promote sustainable economic development, build public support for conservation of wildlife and habitats and provide a marketing platform for a growing nature-based tourism industry.

For example, landowners, business people and communities interested in developing nature-based tourism participated in the Great Texas Wildlife Trails project. These driving trails were developed to help birders and other wildlife enthusiasts find the best spots in the state to view the state's outdoor

bounty. Private citizens, land managers, conservation groups, businesses, government agencies and communities worked together to build a network of trails leading people to the best places in the state to enjoy beautiful scenery and abundant wildlife. Texas is known for great birding and wildlife watching opportunities, and Texans are known for their hospitality. As such, along the trails, travellers can immerse themselves in nature, history and culture.

The Great Texas Wildlife Trails website features nine driving trail maps leading visitors to the best spots to see birds, butterflies, bats, pronghorns and more. Each route features a list of species that might be spotted as well as geographic and plant features and an interactive map.



# Current Provincial and National Focus on Nature & Adventure Tourism

The Tourism Northern Ontario, *Nature-Based Tourists in Northern Ontario (RTO13): A Situation Analysis* indicates that:

- Over **38 million** overnight tourists across Canada were travelling to engage in outdoor tourism experiences apart from hunting or fishing.
- In 2013, almost **one third (or 38.3 million of the 126.6 million)** overnight tourists from all markets can be categorized as nature-based tourists.
- Ontario attracts more nature-based tourists than does any other province.

Several programs exist within the province that support nature & adventure experiences:

## Ontario Parks *Learn to Camp Program:*

The program targets urban residents and provides the opportunity for participants to experience camping in a provincial park—often their first experience doing so. The program provides the transportation to a designated Ontario Park (via Parkbus), all the gear needed to camp and group and/or private instruction for how to best experience an overnight camping trip. Additionally, the *Learn to Camp* program provides community events and travelling campsites in urban areas to get the word out about the program. The program has received notable attention including winning Ontario Tourism Awards of Excellence for their signature program in 2014. The program has recently expanded with offshoots including the *Learn to Fish* program<sup>3</sup> and corporate partnerships with Coleman, Canadian Tire, Parkbus and Ontario Children's Outdoor Charter.

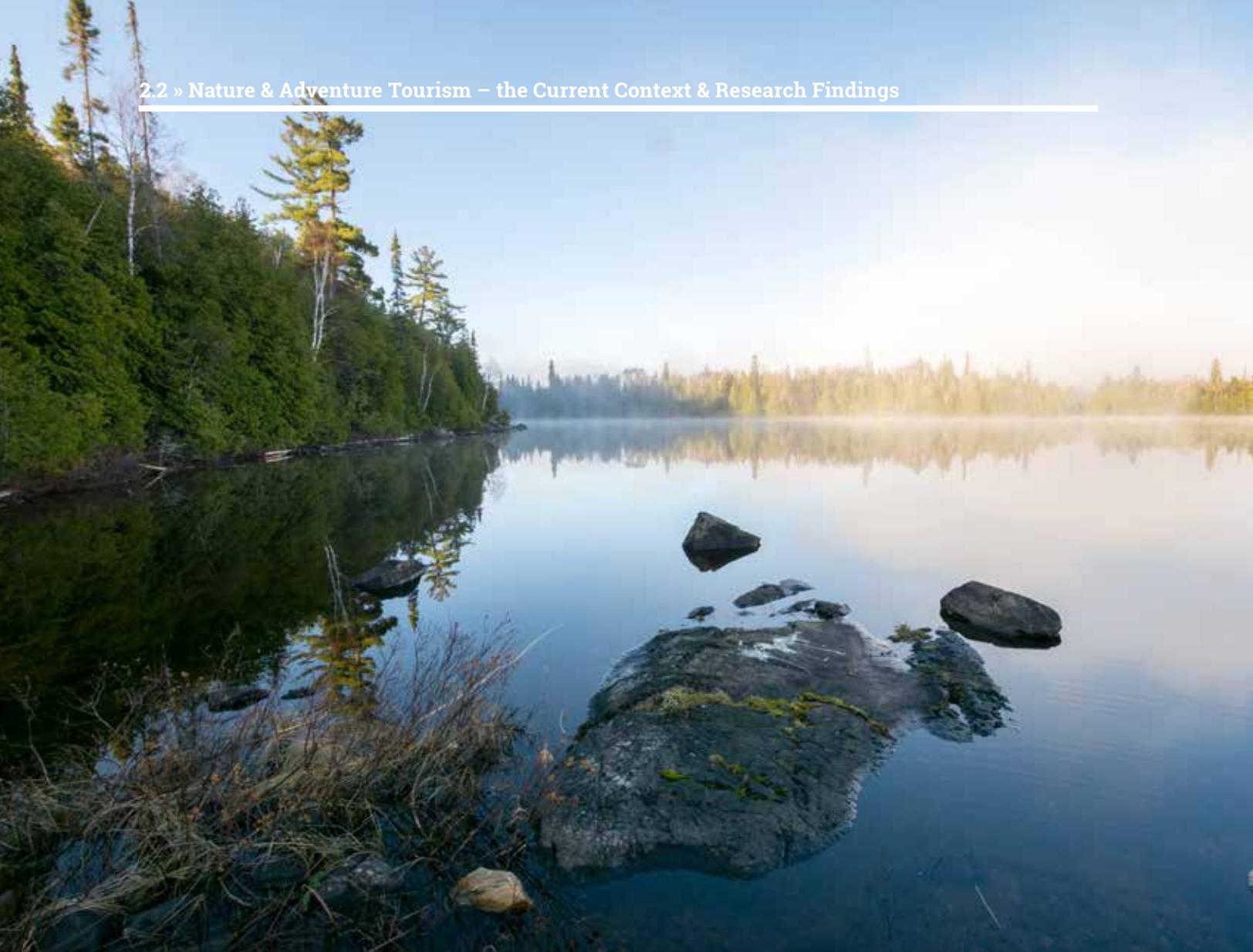
<sup>3</sup> <http://www.ontarioparks.com/learntocamp/learntofish>

<sup>4&5</sup> 2016/2017 Canadian Canoe Culture Outdoor Adventures overview, OTMPC [https://www.simplycast.ca/files/8000098/files/Canadian\\_Canoe\\_Culture\\_Partners\\_Guide\\_PDF.pdf?recipient\\_id=14te3wnrxLavt7tVgedqHU55v34-DVI595](https://www.simplycast.ca/files/8000098/files/Canadian_Canoe_Culture_Partners_Guide_PDF.pdf?recipient_id=14te3wnrxLavt7tVgedqHU55v34-DVI595)

## OTMPC, Outdoor Adventure *Program: Canoe Culture stream*

The Canoe Culture stream launched in January 2017 and is a three-year dynamic domestic and international marketing program through OTMPC's Outdoor Adventure Program, which works to capture the essence of Canadian Canoe Culture in Ontario and position Ontario as a top-of-mind priority paddling destination. The program aims to inspire users to try paddling as part of their outdoor adventures in Ontario. The specific themes of the program are tailored and matched to target markets encouraging paddling tourism adventures throughout the province. The Outdoor Adventure Program additionally offers a "partner badge"<sup>4</sup> component for experiences making them visually easy to recognize as connected with the program and consistent for the consumer.

*"The Canadian Canoe Culture reaches beyond the canoe to include the various forms of paddling and symbolizes the core values and ideals of our province, our country and ourselves."*<sup>5</sup>



## ***OTMPC, Ontario Signature Experiences Program***

Launched in 2014, the Ontario Signature Experiences (OSE) program is a collection of world-class urban and outdoor experiences, which can be completed throughout Ontario. The program framework is complimentary to the Destination Canada Signature Experiences Program offering similar criteria for endorsed experiences.

The initiative showcases experiences that provide authentic, local, site-specific experiences which provide memorable travel activities for consumers. The program works with operators and suppliers to create 'endorsed' experiences, which are then provincially-, federally- and internationally-marketed.

## Parks Canada

Parks Canada outlines nature and adventure tourism priorities within its *2016-2017 Report on Plans and Priorities* and reiterates a focus on:

“Ensuring the quality and reliability of visitor offers by developing experiences that meet the needs of visitors such as offering unique camping experiences, developing programs for children and families and expanding the Learn to Camp Program.”<sup>6</sup>

Parks Canada’s visitor experience “Learn to Camp” program has partnered with Mountain Equipment Co-op and continues to gain traction with a program expansion slated for 2017 where the Learn to Camp program will additionally be offered at select National Historic Sites.

Parks Canada also works directly with the Canadian Federal Department of Small Business and Tourism (through the Ministry of Environment and Climate Change) with a partnership effort to support the growth of Parks Canada’s eco-tourism industries and correlating jobs.<sup>7</sup>

Parks Canada sites located in Northern Ontario include: Pukaskwa National Park, the Lake Superior National Marine Conservation Area and the Sault Ste. Marie Canal National Historic Sites.

## Destination Canada

Through the Federal Government, Destination Canada offers Signature Experiences. These curated experiences frequently feature a nature and outdoor adventure-themed component to their offer. Currently there are 197<sup>8</sup> approved Canadian Signature Experiences including experiences in Northern Ontario, which get marketed provincially, federally and internationally.

<sup>6</sup> <http://www.pc.gc.ca/en/agence-agency/bib-lib/plans/rpp/rpp2016-17/index>

<sup>7</sup> <http://pm.gc.ca/eng/minister-small-business-and-tourism-mandate-letter>

<sup>8</sup> <https://www.destinationcanada.com/en/programs#signatureexperiences>





## Northern Ontario's Current Nature & Adventure Tourism Situation

Both the Marketing Strategy for 2017-2020 and the *2014 Northern Ontario Tourism Product Development Strategy* cite nature and adventure tourism as primary focus or priority areas for product development and marketing in the coming years.

The *Product Development Strategy* called for an "Experience Shift"- the narrowing of experiences and product development to high-priority product areas with the overall goal of focusing efforts on product development with the most potential to advance tourism in Northern Ontario. The strategy stated: "Northern Ontario must build off its successes and opportunities by focusing on best bet product areas for the future".

To determine focus areas, detailed product and market assessments were undertaken. They examined capacity, quality and competitive advantage of current and potential products and reviewed the profile needs and longer-term sustainability of core and niche visitor markets specific to Northern Ontario. Based on the research undertaken as part of the strategy, the resulting product-market match identified the Northern Ontario products with the most opportunity. Among these products included Nature and Adventure Tourism, focusing on opportunities related to notable/signature landscapes, waterways and wildlife viewing in Northern Ontario.



The strategy outlines the foundations for product development activities, including the following key factors:

- Start with best bets;
- Position for sustainability by anticipating where the market is going;
- Leverage best in class operators/assets to inspire and motivate others; and
- Focus time, resources and effort on opportunities with enough critical mass and appeal, which match the markets and type of traveller that Northern Ontario wants to attract.

Specific recommendations found in the strategy surrounding the primary focus area nature and adventure included:

- Create a nature and adventure product development team to investigate opportunities around signature landscapes and waterways that differentiate Northern Ontario from other provinces and states (La Cloche Mountains, Lake Superior shoreline, northern Georgian Bay, French River, Lake Superior Marine Conservation Area, Temagami's Old Growth Forest). Leverage national and provincial parks as key trip motivators.
- Develop a collection of high-quality 'bucket list' offers connected with lodge-based signature outdoor experiences that showcase waterways, trails, wildlife and landscapes (linking of outdoors offers with local culture and heritage).
- Reviewing the opportunity to establish an iconic long-distance hut-to-hut hiking trail linking national, provincial and municipal parks and gateway communities.
- Establish strong working relationships with appropriate levels within Ministry of Natural Resources and Forestry, Ontario Parks and Parks Canada.
- Advocate for support for rural capital investment in items that are ancillary to tourism (signage, cell coverage etc.) but are in demand by today's markets.
- Continuing to link the outdoors to culture as is currently under way with Group of Seven offers under development in both Algoma/Sault Ste. Marie and Northeastern Ontario to appeal to domestic and international Cultural Explorers and Authentic Experiencers.
- Developing products and experiences that appeal to Millennials.



Adventure tourism is a major growth market segment with increasing focus on off-the-beaten path destinations where visitors can make meaningful connections with local peoples and have authentic experiences. Northern Ontario is rich in notable landscapes, wildlife, waterways and other year-round natural assets to support nature and adventure, some mainstream, some niche. Northern Ontario should strive to capitalize on this growth by providing high-yield experiences supplemented by local and regional heritage offers, including Indigenous tourism.

Currently there is an abundance of nature and adventure activities available in Northern Ontario. Some activities have the potential to draw nature and adventure enthusiasts to the region; others serve a more local or supporting role. Currently, nature and adventure activities in Northern Ontario include:

### Passive Nature/ Adventure

- Sailing/ rowing
- Eco adventure- geocaching
- Fall colours/ photography
- Camping/ glamping/ parks
- Wildlife viewing

### Active Nature/ Adventure

- ATVing
- Mountain biking, cycling
- Watersports- boating, snorkeling, scuba diving, rafting, surfing, sailing
- Paddling, canoeing, kayaking
- Winter activities- snowmobiling, snowboarding, skiing, ice climbing, snowshoeing
- Hiking/ running
- Backcountry camping

The 2015 report entitled *Nature-Based Tourism in Northern Ontario (RT013)*:  
A *Situational Analysis* indicates that:

- Northern Ontario was a destination for almost one million of the overnight nature-based tourists travelling in Canada over the year (**3%**).
- The North's market share is about on par with Manitoba (**3%**) and Saskatchewan (4%). British Columbia at **8.1 million** and Alberta at **4.6 million** nature-based tourists are especially prominent destinations for this market, likely because these provinces offer a wide-array of four season outdoor activities and are known for the natural beauty of the Rocky Mountains and pacific shores.
- The nature and adventure visitors to RT013 are almost evenly split between male and female visitors and frequently travel in adult-only parties. These **955,000** nature-based tourists represent one quarter of the total **3.8 million** overnight tourists who travelled in Northern Ontario during 2013 and make up about **1/5th (19%)** of the total overnight, overall spending in the region. Men are comparably more likely (**2/3 compared to 1/2**) to rely on paid roof lodging sector.

## 2.4 » Nature & Adventure Tourism – the Current Context & Research Findings

- Nature-based tourists are travelling predominately in the peak summer season of July-September (**3/5th with an additional 1/5th in the spring April-June**). The profile of nature-based tourists in RTO13 is essentially the same as all overnight visitors to the region with every age group represented and distributed evenly between **14%–19%** for each age group.
- The majority of Northern Ontario's nature-based tourists spend **3-to-4** nights in the region (typical with other overnight travellers) and stay predominantly (**60%**) of their nights in unpaid lodging (private homes/cottages). Campgrounds and trailer facilities are the next accommodation of choice, followed by roofed commercial accommodation. Nature based tourists spend an average of **\$333** per trip (**\$68/night**).
- As might be expected, there is considerable intra-regional outdoor-oriented tourism activity in the North. This intra-regional travel accounts for approximately **36%** of nature-based tourists. Most nature-based tourists to the region are domestic Canadians (**close to 9-in-10**) with other Ontarians making up **37%** of all nature-based visitors than Manitobans and border state Americans. Within Southern Ontario, **13%** of nature-based tourists to Northern Ontario live in the Toronto area.
- The top activities for nature-based tourists to Northern Ontario include: camping, hiking, visiting nature parks, beaches, boating, and wildlife viewing. Each of these activities attracts **1-in-4** nature-based tourists. **1/4** of nature based tourists also engage in cultural or entertainment activities while on their overnight trip with the most common being visiting a historic site (**14%**) followed by going to a museum or art gallery (**10%**)
- Demographics and urbanization will exert the greatest influence on Northern Ontario's nature-based tourism in the coming years. Additionally, climate change will have a direct impact on nature-based tourism businesses through change of season timing, extended seasons for camping, more intense seasonal weather conditions and impact on water- and snow-based activities.
- Nature-based tourists in Northern Ontario spent **\$208** million in the region.
- More than **90%** of the economic benefits generated in Ontario by Northern Ontario's nature-based tourists were retained within the region.

The report findings substantiate that Northern Ontario offers an extensive volume of nature- and adventure-based activities in a centralized location and that Ontario attracts more nature-based tourists than does any other province. These factors support nature and adventure tourism as a priority and a core focus for TNO and other stakeholder organizations across Northern Ontario.

Further information was gathered during a focus group session held in 2015, to discuss the Northern Ontario nature and adventure tourism SWOTT (**see Appendix 1**). For more information on the Nature and Adventure Product Development Committee, its role and purpose, please see **Appendix 2**.

# The Case for Nature & Adventure Tourism in Northern Ontario

Several factors make nature and adventure tourism a quality product for further development in Northern Ontario:

- Nature and Adventure has been identified as a primary focus niche in the Northern Ontario Tourism Product Development Strategy;
- Direct alignment with the 2017-2020 Marketing Strategy which includes Nature and Adventure products and experience as a priority area for marketing resources;
- The outdoors is a core element in the lure and marketing of Northern Ontario to multiple tourism segments;<sup>9</sup>
- Ontario attracts more nature-based tourists than does any other province;<sup>10</sup>
- Positioning Northern Ontario's wilderness as pristine and accessible is a relevant competitive point of differentiation which will be advantageous in the world of nature and adventure tourism marketing<sup>11</sup>

Experiencing the wilderness and outdoors may occur in multiple ways, with differentiated products attracting different consumer segments. Developing and enhancing the quality of nature and adventure activities throughout Northern Ontario will be attractive to nature and adventure enthusiasts. Working to effectively package the nature and adventure offers to create a critical mass will additionally encourage an extended length of stay due to the volume of activities available in centralized locations, making trip planning easier for visitors.

The challenge for Northern Ontario is to create a quality and distinct offer that entices visitors, as many of the nature and adventure activities the market is interested in, can be found closer to home.



<sup>9</sup> Overview of the Tourism Opportunities for Northern Ontario (RT013) Research Resolutions July 2014

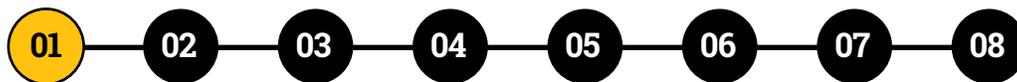
<sup>10</sup> Overview of the Tourism Opportunities for Northern Ontario (RT013) Research Resolutions July 2014

<sup>11</sup> OMTPC's Strategic Direction for Marketing Tourism in Northern Ontario 2017-2020- pp5

# Nature & Adventure Tourism Work Plan for Northern Ontario

8 Steps to further Develop  
**Nature & Adventure Tourism**  
in Northern Ontario:





## STEP 1: Prioritize Nature & Adventure Activities

Further detailed research is required on each of the nature and adventure sub-activities listed to determine if there is justifiable tourism appeal and return on investment in order to narrow the focus of product development efforts to focus on best bets.

It is recommended to consider contracting outside services to complete an activity-specific research report, in the interest of determining numbers related to tourists travelling to Northern Ontario with a key trip motivator in relation to each nature and adventure activity (ice climbing, fall photography etc.).

Consider Ontario-wide numbers to determine the potential market, and if these activities could be opportunities worth the investment for the potential of future tourist visits. Further, contrast the numbers against other product considerations given the need to prioritize investments.

### **J** Timeline: Short term

Based on the above research, determine:

- The potential market size in terms of number of visitors and potential tourism spend for each type of nature and adventure activity;
- The products available to match with the market and each product's current state of readiness or quality, and;
- The competitive factors to ensure that Northern Ontario has the ability to entice visitors to travel and partake in the experience.

### Northern Ontario Nature & Adventure Product Development Committee Role:

- Review the research outcomes
- Given research findings, provide input to TNO regarding type of activities to focus on for further development





## STEP 2: Inventory & Assessment Criteria

The list of nature and adventure activities available throughout Northern Ontario is lengthy. Not all activities have enough appeal or tourism draw or emphasize signature landscapes. As many of the nature and adventure experiences available in Northern Ontario are also available to visitors closer to home, positioning them with site-specific connections or what visitors can't get closer to home is essential.

Focusing on specific nature and adventure activities which utilize Northern Ontario's competitive advantage (emphasizing signature landscapes, accessible outdoors and pristine wilderness) is essential.

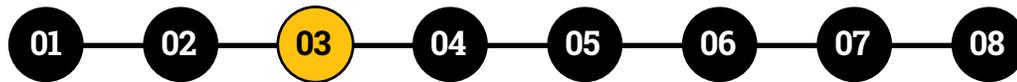
Following the completion of activity-specific research which outlines the potential market size for each identified nature and adventure activity, it is recommended that an inventory of nature and adventure activities be created that link primary activities to signature landscapes that have distinction with travellers and differentiate Northern Ontario from other places. i.e. La Cloche mountains, Lake Superior shoreline and water trail, northern Georgian Bay, French River, Lake Superior Marine Conservation Area, Temagami's old growth forest, Trans Canada Trail, Path of the Paddle Association, national and provincial Parks.

### **Timeline:** Short to Medium Term

Once the signature landscapes nature and activities inventory list has been created, those identified activities can be reviewed for their state of market-readiness. General market-readiness criteria should be applicable to all activities but note additional activity-specific criteria may be required to ensure quality products and experiences are being offered in Northern Ontario. This refined list matched with assessment criteria will provide information on best bet areas for nature and adventure activities linked with signature landscapes in Northern Ontario.

### **Northern Ontario Nature & Adventure Product Development Committee Role:**

- Support and give guidance to the proponent creating the inventory of nature and adventure activities which directly connect with signature landscapes
- Review market-readiness outcomes and based on findings, provide input to TNO regarding asset(s) to further develop



## STEP 3: Product-Market Match

Utilizing the nature and adventure signature landscapes inventory list and the market-readiness criteria, a review of the inventory will allow the alignment of potential activities with priority target consumers in an effort to create best bet product matches. Some active experiences may appeal to a different consumer than those looking for passive nature experiences. Because the typical nature and adventure visitor to Northern Ontario is almost equally dispersed among all ages (as indicated in the research in the *2015 Nature*

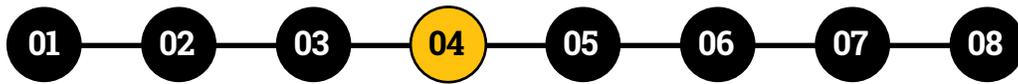
**J** **Timeline:** Medium Term

*Based Tourists in Northern Ontario RT013: A Situational Analysis*), it will be important to align the identified priority activities which meet the market-readiness criteria and match them to Northern Ontario's target consumer who is looking for these types of signature nature and adventure experiences. The inventory should also be reviewed to align with the 2017-2020 Northern Ontario Marketing Strategy, which highlights specific consumer groups (such as but not limited to: avid/ niche travellers, nature lovers etc.).

### Northern Ontario Nature & Adventure Product Development Committee Role:

- Provide input into recommended best bet matches
- Provide feedback on the recommended alignment of market-ready products with OTMPC's Northern Ontario Tourism Marketing Strategy priorities





## STEP 4: Increase Quality of Nature & Adventure Activities

Though the potential list of nature and adventure activities may be substantial, the degree and state of readiness of each product will vary. Nature and adventure travellers may participate in multiple activities during their time in Northern Ontario, so ensuring the quality of each experience is consistent is important. It is recommended to review the inventory and market-readiness documents, which will indicate sectors/activities that may require additional quality enhancements. Utilization of the Tourism Excellence North (TEN) quality tools for both individual operators and communities to raise the bar will help to create a consistent experience for consumers.

**J** **Timeline:** Medium Term

### **Northern Ontario Nature & Adventure Product Development Committee Role:**

- Provide input to proponent reviewing activities, experiences which would benefit from additional TEN support
- Communicate endorsement and championing of benefits of TEN to supporting operators





## STEP 5: Identifying New Nature & Adventure Opportunities

The nature and adventure activities available in Northern Ontario may shift with a changing consumer and environmental landscape. In an effort to close the gap, align these items and counter some of the changes, identify product market matches and potential quality shifts which could become areas of opportunity for potential future product development enhancements. For example, creating new programs (like yurts, teach reach etc.) will make camping easier and less intimidating and will help to counter aging and urbanization pressures being experienced by changing tourists. Or enhancement to nature and adventure 'endorsed made in the north experiences,' indicating their level of ability- beginner, intermediate advanced assisting with greater visitor comfort and ease of experience.

**Timeline:** Medium to Long Term

### Northern Ontario Nature & Adventure Product Development Committee Role:

- Provide input into new opportunities identified
- Provide input to the proponent undertaking the analysis of activities and experiences which would benefit from adjustments



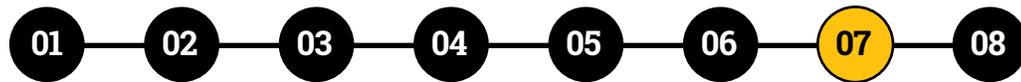
## STEP 6: **Advocate for Infrastructure**

Ongoing advocacy for supporting infrastructure is needed to ensure that the public assets, trails, waterways, scenic lookouts, washrooms at camping and hiking facilities and signature landscapes remain intact and available for public use alongside of improved cell service and wayfinding signage to support visitors to the region.

**⌋ Timeline:** Ongoing

### **Northern Ontario Nature & Adventure Product Development Committee Role:**

- Work with TNO on advocacy initiatives where support is needed



## STEP 7: Bundle Activities

Bundling nature and adventure activities will help simplify the travel planning process for the consumer. Packages could combine multiple seasonal activities, or bookend "before and after" wilderness activities in gateway communities to encourage an extended length of stay in the region. Packaged offers additionally may assist with obtaining statistics on user volume, traditionally challenging to measure at non-gated attractions especially if rental equipment is not required by the consumer.

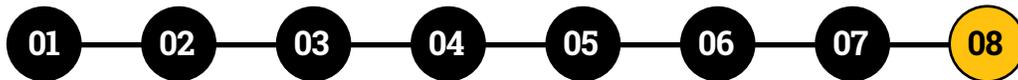
**J** **Timeline:** Medium to Long Term

A nature and adventure marketing plan should outline tactics to be used to push the experience(s) to consumers. When marketing the experience, using Northern Ontario signature landscape positioning and targeted messaging to speak directly to the market will ensure the product resonates with the consumer. Additionally, strategic marketing messages are important to address any market concerns (for example, potential distance or safety issues).

### **Northern Ontario Nature & Adventure Product Development Committee Role:**

- Provide input into packaging ideas and deliverables





## STEP 8: Leverage & Develop Partnerships

Partnership opportunities should be considered to further enhance nature and adventure product development opportunities, consumer programs and investment attraction initiatives required to further enhance infrastructure and the quality of nature and adventure experiences throughout Northern Ontario.

### Initiatives already in place could provide additional opportunities to:

- Embrace and align with OTMPC's Canada Canoe Culture initiative;
- Support Parks Canada and Ontario Parks Teach to Reach programs;
- Leverage individual operators/ outfitters for additional 'learn to' concepts in glamping, fishing, rock climbing, kayaking;
- Investigate partnership with Leave No Trace Canada;
- Connect with established nature and adventure tourism organizations in the region such as birding clubs; and
- Align with Lake Superior Watershed Conservancy guide training and certification program development.

**J** **Timeline:** Ongoing

### Northern Ontario Nature & Adventure Product Development Committee Role:

- Create awareness with OTMPC, TNO, DMO's etc. in regards to nature and adventure developments and partnership opportunities.
- Identify and build relationships with nature and adventure organizations to synergize marketing activities.





# APPENDIX I:

## SWOTT Analysis

During the Northern Ontario Tourism Summit held in Sault Ste. Marie in November 2015, a Nature and Adventure tourism focus group session was held with 24 participants in attendance. Their input regarding questions posed about trends and opportunities was as follows:

### What is the single biggest shift you are seeing?

- Demographics – age of participants is getting older
- Shorter duration – weekend warriors
- Customer needs for packaging
- People with less outdoors experience
- Operators feel need to be all-season
- Customers shift from avid to non-avid
- Type of traveller – multi-generational
- Not all people have cars
- The expectation that the tools and mechanisms are in place to find information on nature and adventure experiences, knowing that these experiences exist and are easy to plan
- The need for more supporting products/amenities to make a higher quality experience; guides are very important
- The desire for comfort, safety, to be worry-free and feel secure
- The demand for customized – facilitated process/menu of choices
- All-inclusives are becoming more popular, guides included
- The gravitation towards local experience, authentic experience i.e. food, stories, tales; see wildlife in actual habitat; consumed in an environmentally-friendly manner
- The need for instant gratification
- Reliance on technology; visitors want to share the experience with everyone; looking for trophy or epic photos or videos, and the need to be connected at all times
- Multi-generational groups on vacation
- The demand for being in more developed facilities in turn results in more labour intensive and higher maintenance of the product
- High quality tourism; lower impact on environment/responsible common themes as reported by group



### Common Themes as noted by this group:

- Group of Seven themed itineraries
- Adventure bucket list tours
- Certification courses
- Adventure challenges

What is one NEW product or experience that Northern Ontario can deliver to attract new visitors in the next 3 years?

- Learn to backcountry camp
- Indigenous cultural food experiences
- Voyageur heritage tours
- Guided, high-quality wilderness experiences; "glamping"
- Outdoor theme trips – yoga, cooking, bushcraft, mystery
- Cultural bushcraft experiences (Indigenous, authentic, natural, learning, stimulating, and hands-on)
- Group of Seven; photograph site then stay in wilderness and paint

biking; how to survive winter; quinzee (snow structure) experience

- Trail running events
- Adventure challenges – combination of geocaching and wilderness
- Park bus programs with bus tour companies
- Scuba-diving/snorkeling

- Hut-to-hut: snowshoeing, snowmobiling, water trails, hiking
- Gourmet meals in the wilderness: authentic/high quality
- Bucket list tour: group tour that does all these Northern experiences
- Adventure in residence: beginner trips, learn the experience and provide guides and all services
- Certification courses; "leave no trace" principles
- Winter camping; fat



## + STRENGTHS

- + Northern Ontario's geography (topography, forest, geologic features, lakes, rivers, watersheds, flora, fauna).
- + Access to nature from urban/gateway cities.
- + Four seasons of outdoor adventures.
- + Trans Canada Trail (both land and water-based) along with various land and waterway trail networks (e.g. Path to the Paddle).
- + Group of Seven history.
- + Heritage and Indigenous culture.
- + Variety of established world-class recreational/natural pursuits such as; birding, sea kayaking, white-water paddling, flat-water padding, mountain biking, snowshoeing, sailing, hiking, rock climbing, ice climbing.
- + Northern Ontario has its own tone, flavor and characteristics.
- + Areas that are significant culturally, historically and physically.
- + Ideal for education and cultural immersion and hands-on interactive nature and adventure experiences.
- + Northern Ontario has the physical, cultural and historical attributes to create experiences that create excitement that can blow visitors away through involvement.

## - WEAKNESSES

- Lack of amenities along trails (including four-season accessible parking lots, washrooms, garbage/recycling).
- Poor/no network coverage across some areas in Northern Ontario.
- Lack of packaging/theming and/or trip planning options.
- Lack of community involvement in the identification, ownership and development of nature and adventure experiences.
- Lack of maintenance, wayfinding and signage on trails.







# OPPORTUNITIES

- Opportunity for marketing alignment with OTMPC’s Northern Tourism Strategic Direction, with ‘Nature and Adventure’ being a priority product and experience area. Focus is on paddling, cycling and hiking.
- Need official designated, signed, mapped, and marketed Northern Ontario routes with both self-guided and paid guided opportunities.
- Learn to backcountry camp – capitalize on entrepreneurial opportunities.
- Indigenous cultural food experiences.
- Voyageur heritage tour.
- Guided wilderness experiences; “glamping” type offerings.
- Outdoor theme trips – yoga, cooking, bushcraft, mystery.
- Cultural bushcraft experiences (Indigenous, authentic, natural, learning, stimulating, and hands-on).
- Group of Seven; photograph site then stay in wilderness and paint.
- Hut-to-hut: snowshoeing, snowmobiling, hiking, water trails.
- Gourmet meals in the wilderness: authentic/high quality.
- Bucket list tour: group tour that does all these Northern experiences.
- Adventure-in-residence: beginner trips, learn the experience & provide guides and all services.
- Certification courses; leave no trace principles.
- Winter camping; fat biking; how to survive winter; quinzee (snow structure) experiences.
- Trail running events.
- Adventure challenges – combination of geocaching and wilderness.
- Park bus programs with bus tour companies.
- Scuba-diving/snorkeling.
- Great Lakes surfing.
- Expand on efforts to promote established nature and recreational pursuits such as birding, sea kayaking, white-water paddling, flat-water padding, mountain biking, snowshoeing, sailing, hiking, rock climbing, ice climbing.
- Opportunities for education and hands-on interactive nature and adventure experiences.
- Northern lights viewing.
- Northern animal viewing ‘safari’, being able see moose, bear, deer, wolves in habitats.
- Far North opportunities such as polar bear viewing in Hudson Bay.



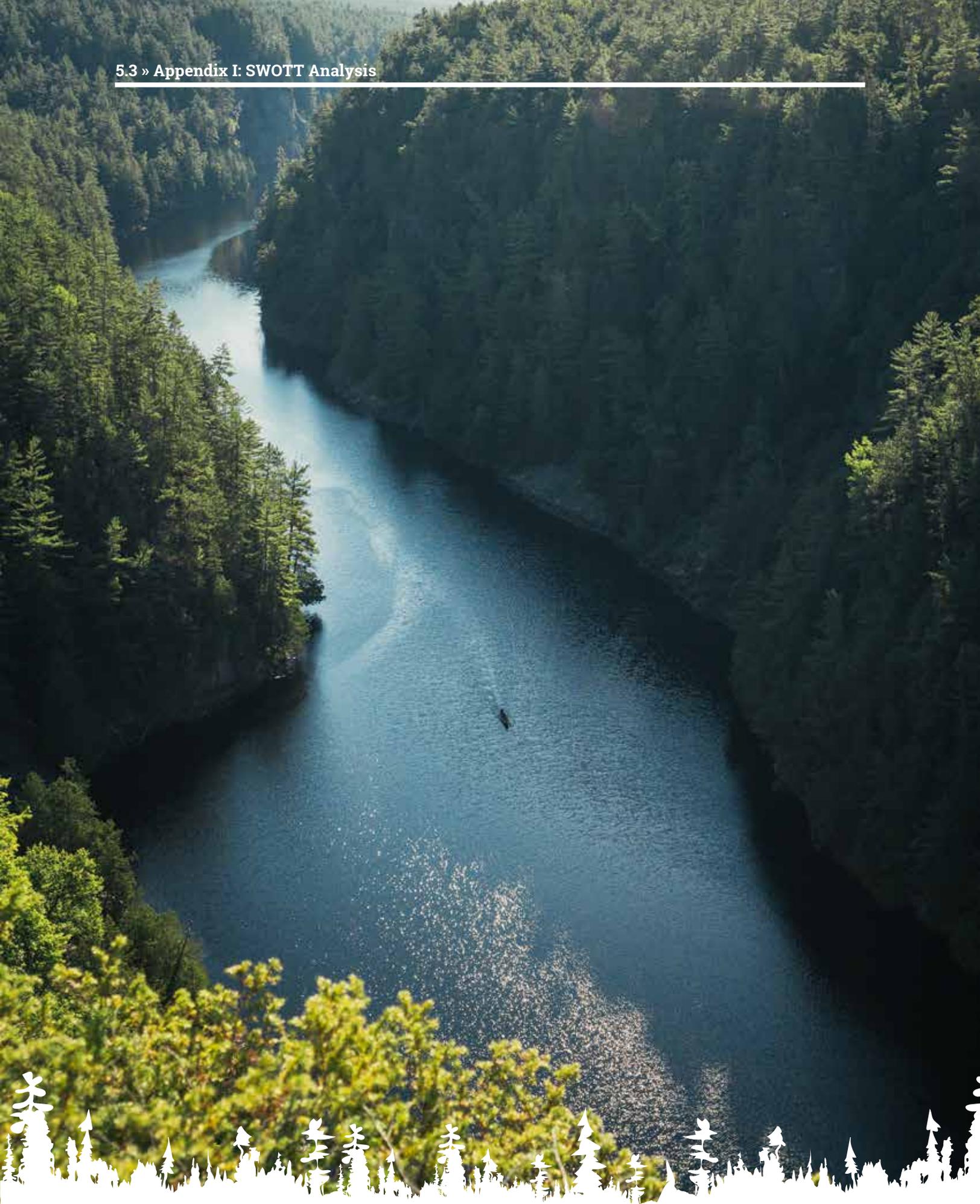
## THREATS

- Competition from other provinces for the 38 million overnight Canadian tourists travelling to engage in outdoor tourism experiences apart from hunting and fishing.
- Possible closures of trails, facilities and parks due to lack of funds and management.
- User clash between motorized vehicles such as ATV, motorized boats, snowmobiles and self-propelled users on trails and waterways.
- Access to nature and adventure tourism areas can be restricted and limiting, sometimes due to the lack of risk management plans or not allowing users on private property (e.g. rock climbing in Ontario Provincial Parks).
- Northern Ontario's tourism businesses may have to adapt to climate changes.



## TRENDS

- The Canadian nature-based tourist relies heavily on private cottages, campgrounds or homes of friends and relatives – thereby minimizing lodging costs and, in turn, total spending. Can also be self-contained, by not accessing restaurants and cooking meals for themselves.
- There is considerable intra-regional outdoor-oriented tourism activity in the North
- A large proportion of the outdoor-oriented market for the North live in the Toronto area and Manitoba.
- Demographically, nature-based tourists are evenly distributed between men and women.
- Visitors to Northern Ontario average age is 45 years. Most represent adult only travel parties.
- More campers bring children and teens on trips than do those using other forms of lodging
- Northern Ontario's nature-based tourist spends between three and four nights in the region.
- Nature-based tourists seem to focus their attention on enjoying the outdoors, possibly leaving little time to participate in the urban gateway/region's entertainment and cultural experiences.
- The most popular outdoor activities include hiking, camping, visiting the region's nature parks and beaches, boating and viewing wildlife and bird watching.



## APPENDIX II:

# Purpose of the Nature & Adventure Product Development Committee

Members of the Nature and Adventure Product Development Committee were selected based on their experience in nature and adventure 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 TNO on the enhancement and development of nature and adventure 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 nature and adventure tourism as a primary tourism product in Northern Ontario and utilizes their feedback and advice to action this product niche.



# Role of the Nature & Adventure Product Development Committee

Team members use their wisdom, coupled with research, to support work undertaken by TNO with the purpose of attracting more nature and adventure visitors to Northern Ontario with the main objective 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 nature and adventure tourism products that are complimentary and coordinate well with other product niches in a sustainable way.



## Nature & Adventure Product Development Committee Members

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<b>Pamela Jalak</b>	Parks Canada	705-206-1365	pamela.jalak@pc.gc.ca
<b>Joanie McGuffin</b>			
<b>Steve Bruno</b>	Ontario Tourism Marketing Partnership Corp.	226-339-2510	steve.bruno@ontario.ca



# RESOURCES:

**Elliot Lake – A Development Manual for Community-Based ATV Tourism Product -**  
<http://atvontario.com/pdf/ATV%20manual.pdf>

**Kananaskis Country – Management Plan -** <https://www.albertaparks.ca/media/447248/kcpraandbcppmgmtplan.pdf>

**Great Texas Wildlife Trails -**  
<http://tpwd.texas.gov/huntwild/wildlife/wildlife-trails/>

**Tourism Northern Ontario, Northern Ontario Product Development Strategy -**  
[https://tourismnorthernontario.com/wp-content/uploads/2016/08/2014\\_northern\\_ontario\\_product\\_development\\_strategy.pdf](https://tourismnorthernontario.com/wp-content/uploads/2016/08/2014_northern_ontario_product_development_strategy.pdf)

**Tourism Northern Ontario, Nature-based Tourists in Northern Ontario (RTO13): A Situation Analysis -** <https://tourismnorthernontario.com/wp-content/uploads/2016/09/RTO13-Nature-Based-Final-Report-July-2015-.pdf>

**The Ontario Trails Strategy (OTS) Trails Action Plan 2015-2018**  
<https://www.ontariotrails.on.ca/assets/files/pdf/OTCC/Trails%20Action%20Plan%20-%20Final%20-%20Dec%202015.pdf>

**Destination Canada: Signature Experience Program**  
<https://www.destinationcanada.com/en/programs#signatureexperiences>

**Ontario Parks- Learn to Camp programs**  
<http://www.ontarioparks.com/learntocamp>

**Canadian Canoe Culture program**  
<http://ohto.ca/wp-content/uploads/OTMPC-CCC-Partner-Guide-Low-Res.pdf>

**Ontario Signature Experiences Program**  
<https://www.tourismpartners.com/en/partnership-opportunities/ontario-signature-experiences>

**Parks Canada- 2016-2017 Plans and Priorities**  
<http://www.pc.gc.ca/en/agence-agency/bib-lib/plans/rpp/rpp2016-17/index>



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