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**Nature & Wildlife
Product Development Strategy**

Ontario 

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Nature & Wildlife Product Development Strategy

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The Focus of This Report

This report outlines a strategy to refine and further develop structured nature and wildlife themed product across Northern Ontario. Enhanced and diversified product showcasing nature in all of its dimensions will help build a competitive advantage for northern tourism partners in overseas and domestic markets.



A STRATEGY BASED ON CURRENT REALITIES

- Visitors from overseas markets have a keen interest in exploring wilderness areas and observing bears, moose, deer, wolves, birds, and other wildlife in their natural habitats. Authentic, nature-focused experiences are equally compelling for domestic audiences.
- In the wake of the COVID 19 pandemic, tourism operators, particularly those who are located in remote, wilderness or rural areas, are focused on rebuilding business and stabilizing financially. Priority target customers are from traditional source markets; viewed as reliable, high yield potential.
- Demand from established customer segments and markets is strong; with many operators reporting booking to full capacity for the entire peak season.
- A small number of wilderness lodge operators approached the challenges presented by the pandemic by adapting, mapping out new business strategies and successfully developing new revenue opportunities, attracting new customer segments, mainly from Ontario and domestic source markets.
- The vast geography and expansive wilderness offer diverse opportunities to explore the unspoiled nature and experience unique outdoor adventures across the north, featuring the Aurora Borealis, birds, wildlife, canoeing, kayaking, hiking, ATV exploration, and the relationship between Indigenous cultures and the land.



01

Prior to the pandemic, key northern Ontario stakeholders who were interviewed, universally endorsed the value of creating and facilitating opportunities for visitors to experience and learn about wilderness areas, the wildlife, birds, waterways, and scenic landscapes. What is less clear for many, is how to develop and operationalize new experiences, to create unique, high value programs or packages that are export or market-ready.



Wilderness areas, National and Provincial Parks across Northern Ontario are the natural habitats for diverse wildlife, birds, flora, and fauna of the boreal forest. However, a significant gap exists, with respect to organizing structured tourism experiences within these habitats, particularly for FIT visitors travelling on self-drive touring itineraries. Facilitated activities within select parks are currently offered seasonally on a very limited basis.



Research to date shows that there are only a few northern tourism operators currently providing a defined program or package designed to facilitate both experiencing and learning about natural phenomenon such as the night sky, Aurora Borealis; or observing birds or wildlife.



Some First Nations groups and/or individuals currently provide or are developing tourism experiences or guided programs which feature wildlife, birds, fish, and educational content about the relationship between their cultures and the natural world. These organized, “export ready” programs are generally centered in the areas, either on or in proximity to Manitoulin Island, where First Nations groups have been engaged in tourism development for many years.



02

Northern lodges and resorts situated in remote wilderness areas typically focus on hunting and/or fishing, or a combination of fishing and more traditional family resort activities. While many identify and promote the opportunity to view wildlife and bird species, those who offer a well-defined, guided experience in the outdoors are the exception.



For traditional hunting or fishing lodge operators, making the “pivot” to become a “Wilderness or Eco-Tourism lodge”, focused on immersing guests in the natural landscape, developing and facilitating enrichment and learning about the birds, wildlife, geology, and waterways in their immediate area, would require a significant leap into uncharted territory.



In many cases, this “pivot” would also entail capital investment to upgrade and/or modify the existing infrastructure, and sourcing naturalists, scientists, astronomers, and subject matter experts or guides to meet the needs and expectations of new customer audiences.



DNO and TEN Specialists have noted the gap between the quality and service standards of many wilderness or lodge accommodation businesses, and the expectations of new customer audiences. Educating and inspiring business owners to invest in upgrades and adapt to a rapidly evolving marketplace is an ongoing, long-term priority, an important cornerstone for success in attracting the lucrative customer segments focused on wildlife and nature.



Equally important is the need to build a shared understanding of the opportunity for revenue growth and the expectations of new, potential high yield customers who seek quality, nature-based experiences across the north.

Key Learning & Best Practices

A market scan of tourism operators, parks and attractions who facilitate nature-based experiences and wildlife viewing in Ontario, Nova Scotia, Newfoundland, British Columbia, and Manitoba revealed an inspiring range of unique and engaging opportunities for visitors with diverse interests.

Successful operators shared their learning, strategies, and critical success factors for facilitating authentic experiences set in unique regions across the country. Canadian receptive tour operators provided input on the expectations of their overseas clients, competitive destinations, and market demand.

COMPETITIVE DESTINATIONS

Iconic destinations renowned for wildlife viewing offer well-structured, high-quality experiences for discerning travellers. In many cases, nature and wildlife viewing are the foundation of the tourism industry. These refined experiences are central to the destination brand, with equity and solid reputations built over many years.

Some examples of Canadian destinations specializing in nature or wildlife focused tourism include:



**CHURCHILL,
MANITOBA /**

- Polar Bears
- Sea mammals
- Aurora Borealis



**QUÉBEC
SAGUENAY /**

- Whale watching



**LES ÎLES DE LA
MADELEINE /**

- Seal pup photo safari



NEWFOUNDLAND /

- Multiple options to view Whales, Sea Birds, Icebergs

Owners of well established, successful tourism businesses specializing in Canadian eco-tourism, nature and wildlife viewing adventure trips have highlighted several key elements that are central to their success:

- It is important to understand that consumers want **authentic nature**, i.e., wildlife in its natural habitat with diverse options for observation.
- **Learning and enrichment** are core elements of these programs, facilitated by naturalists, scientists and other qualified specialists.
- Consumers seek engaging experiences that do not harm the landscape, nor interfere with the natural behaviour of wildlife.
- In all cases, the credibility of the tourism operator or destination hinges upon respect for the environment and animal habitats.
- Photography is an important theme in existing product; usually supported by professional photographers and / or wildlife experts, naturalists, or astronomers.
- The business is situated in a **unique geographic area**, which is the natural habitat of the wildlife, birds and / or sea mammals featured in their programs.
- Viewing wildlife in their natural habitat most often hinges on annual migration patterns and is therefore a seasonal opportunity. Successful operators have developed complementary programs and experiences such as viewing the Aurora Borealis, annual bird migration, sea mammals and the flora and fauna, which help to fill other periods during the year.
- Often, these destinations are in very remote areas where transportation and accommodation are limited. This in turn impacts the overall program cost and the potential target customers, who are quite affluent.
- Customers who are investing anywhere from \$5,000 to \$15,000 per person for a wilderness adventure, wildlife viewing, or nature-themed trip are typically well travelled, well-educated and keen to learn from local naturalists, photographers, scientists, astronomers and subject experts about the environment, the animals, and the natural phenomenon that they will experience. Interpretation is an essential part of the experience; a significant value that tourism operators provide to their guests.
- These customers have high expectations for the **quality of accommodations, services and food provided**. Typically, they are environmentally aware, however, they still expect access to Wi-Fi, reliable electric power, and clean, fresh water. One might characterize their expectations as “luxury in the wilderness”.
- Guest safety and risk management are important considerations for operators of remote wilderness experiences. Engagement of local naturalists and experts in wildlife behaviour and habitats is critical.
- Matching or exceeding these key success factors will be essential if Northern Ontario is to establish a credible competitive position in the Nature & Wildlife tourism segment.

“People won’t come to “maybe” see wildlife”. They are spending upwards of \$12-15,000 per person to come to our lodges on Hudson Bay. Guests expect the BEST of everything, even in this remote wilderness location.”

— Mike Reimer, owner of Churchill Wild



✓ Reality Check

Tourism product today in northern Ontario which features wildlife viewing or nature- focused themes would not stand up alongside established destinations or programs renowned for facilitating authentic, immersive experiences and learning opportunities. Not in the sense that well-travelled consumers expect.



Examples of successful nature and wildlife themed product in Canada

LOCATION	TOURISM OPERATOR	EXPERIENCE
Les Îles de la Madeleine, Québec	Château Madelinot	Seal Pup Photo Safari
Montebello, Québec	Parc Omega	Wildlife preserve, wildlife observation
Cape Breton Highlands, Nova Scotia	Parks Canada	Skyline Sunset Hike – Wildlife viewing
Bay of Fundy, Nova Scotia	Flying Apron Inn & Cookery	Dining on the Ocean Floor
Bay of Fundy, Nova Scotia	Burntcoat Head Park	Tidal Reveal – Guided Ocean Floor Tours
Churchill, Hudson Bay	Churchill Wild	Wildlife Walking Safaris, Polar Bears, Beluga Whales
Churchill, Hudson Bay	Frontiers North Adventures	Photo Adventure-Northern Lights Churchill Beluga Whales
Whitehorse, Yukon	Northern Tales Travel Services	Aurora Borealis Viewing; Yukon Wildlife Preserve
Northwest Territories, Mosquito Lake	Tukto Lodge	Nature Observation, Photography Tours
Yellowknife, NWT	Aurora Village	Northern Lights & Indigenous Interpretation
West Coast, British Columbia	Maple Leaf Adventures	Great Bear Rainforest Safari; Haida Gwaii; Whales & Wild Isles

“It must be noted that clients are very passionate about animal rights; therefore, wildlife viewing must be respectful of the animals.”

— Messaging from Canadian receptive specialist operators



Key considerations for Northern Ontario

The focus of this strategy is not to try and compete directly with iconic, well-established destinations. Rather, northern partners can leverage insights and advice shared by successful tourism operators to rethink, refine and re-launch innovative, new immersive programs, infrastructure and product showcasing the best of what the north offers.

- **European tour operators are clear about client expectations:** visitors to Ontario are seeking **authentic nature and wildlife experiences**. Some northern tourism stakeholders have suggested that it is possible to set up baiting stations to attract bears, for visitor viewing. However, the goal is to observe wildlife in a natural habitat or environment, not in a “man-made” or what is perceived as an “artificially created” setting.
- Wilderness areas, parks and crown game preserves are home to abundant wildlife. The challenge in developing an authentic, credible product, is how to facilitate learning and observation in an environment where it is nearly impossible to guarantee viewing.

Canadian receptive specialist operators underscored the following:

- Experiences and product will need to meet high standards for quality, content, and delivery.
- First Nations peoples possess a deep understanding of nature and the land. Engaging with members of Indigenous Tourism Ontario and various First Nations groups to help them embrace the value of tourism, and work together with mainstream tourism industry stakeholders would be ideal. Building or enhancing these relationships requires a careful, well-planned approach.

Implications for Nature & Wildlife Product Development



Timing is an important consideration for the introduction of a new product development strategy. Post pandemic, rural tourism partners will need time to rebuild, hire qualified talent and replace lost revenue. It will take time to build engaged teams of committed partners and champions to lead product development initiatives on a community or sub region level.



Education about the competitive landscape across Canada, and the expectations of high-yield visitors in target markets will be essential in the initial phase of implementation.



Best Practice Missions facilitated by Tourism Excellence North (TEN) can be designed to provide northern partners with an immersive learning experience in established Canadian destinations with recognized, successful operators who facilitate complex nature and wildlife themed programs.



Success will come from northern tourism partners embracing a shared understanding of the gap between what is available to visitors today, and what truly authentic nature-based or wildlife-themed product entails.



Product development is a process that often spans years, and therefore communication with stakeholders, sharing progress and successes will be important factors in building and sustaining interest and support.

The Opportunity

Nature in its many facets is already featured in many tourism experiences in northern Ontario. The potential to attract new revenue from overseas and North American visitors is significant. For example, cruise ship operators are keenly interested in providing their guests with authentic experiences showcasing the rich natural environment in the north.

Northern Ontario can build a diverse range of product, touring routes and experiences tailored to meet and exceed the expectations of higher yielding visitors whose interests are equally diverse. Ideally, a network of qualified ground operators can assemble and deliver high quality programs that might feature multiple nature themed experiences.



Stakeholder Engagement

Tourism partners, in particular small business owners, will benefit from understanding current research; how consumer priorities have changed, and emerging opportunities for growth. DNO and / or TEN can play a valuable role in making research easy to access and interpret for stakeholders who may not have the time or inclination to delve into the details and trends. Concise online, self-directed learning sessions could be provided by TEN, with a complementary facilitated, interactive component which would enable participants to place valuable new learning in the context of their respective operations.

A Partnered Approach

Experience has shown that success will come from stakeholder-led initiatives. Engaging tourism partners within each sub-region with the experience and commitment to develop new, authentic nature and wildlife themed product; DNO and DMOs can build a network of product champions.

Provincial and national parks across the north will be essential partners, and therefore need to be engaged as development partners with DNO and stakeholders from the outset. Ontario Parks has confirmed interest and support for this product development strategy. Several new initiatives currently underway and planned for future development will expand the scope of guided learning opportunities within select provincial parks.

Locally based product “champions” will be equipped to inform, support and influence partners to become export-ready for overseas markets, and attract new, higher yield domestic visitors. Success often begins with a team of engaged tourism partners who possess the vision and drive to spearhead change.

Developing Nature & Wildlife Themes

It is not realistic to market “wildlife viewing” as an assured opportunity, as is the case in other Canadian destinations. Wildlife can be positioned as an important element within the broader context of nature-focused infrastructure, experiences, product, and touring programs designed to enrich visitor learning and appreciation of northern Ontario’s rich natural heritage.

- The focus of product development, including day trip and multi-day touring itineraries is to engage visitors through meaningful programs designed to educate and showcase the diverse geography, nature, and wildlife habitats across the north, while noting that wildlife viewing is not guaranteed.
- Naturalists, scientists, astronomers, and other subject experts are important partners who can contribute to content development, interactive presentations, interpretive walks, hikes, and other elements for specific programs. These partners can add huge value to nature and wildlife themed product.
- Birding could take a separate approach, since migration patterns do ensure viewing of some rare species at specific times of the year. Specialists will need to be identified and engaged to help create and facilitate program content.
- Tourism operators who already provide structured wildlife or nature-based programs can mentor fellow operators in the development process.
- Members of the DNO Nature & Adventure Product Development Committee can leverage their experience and knowledge to lead and influence new partners in the development process.
- Existing infrastructure and natural assets could be grouped under several themes, providing a framework for initial development discussions.

Some suggestions for initial themes include:

PRELIMINARY PRODUCT THEMES



Geology and the formation of wilderness landscapes, lakes and rivers (e.g. Interactive displays at Lake Superior Provincial Park Visitor Centre; Agawa Canyon).



Indigenous Traditions, Knowledge and guided interpretation of the land, flora and fauna.



Birding in the north.



Northern Wildlife and Wilderness habitats:

Learning about wildlife in parks, preserves and wilderness areas; potential for viewing safely.



Astronomy & Dark Sky Preserves: unique viewing of the night sky and Aurora Borealis; exploring Indigenous traditions and interpretation of night skies.

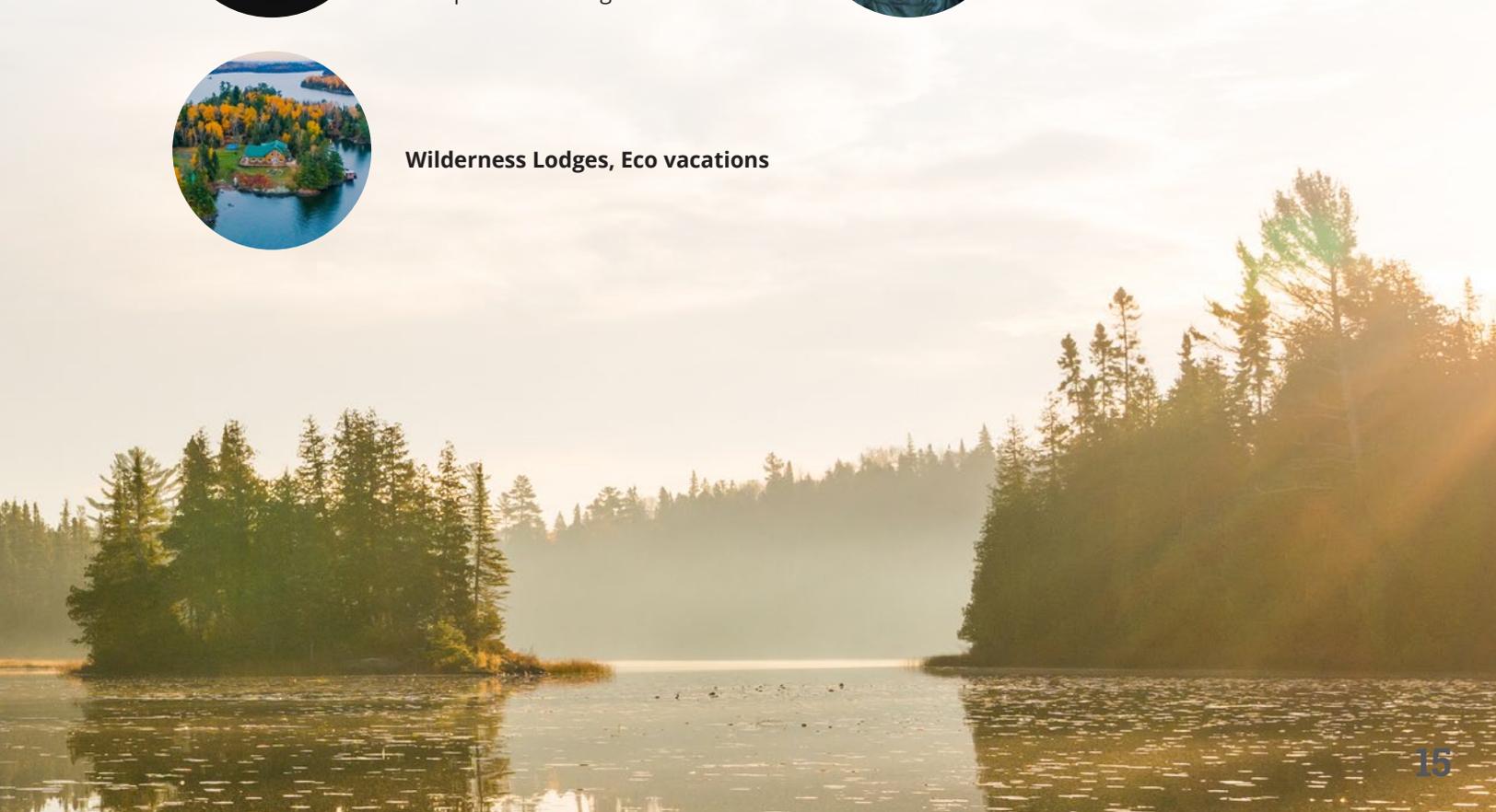


Northern Nature Adventures:

Paddling, Hiking Trails and Camping in wilderness areas



Wilderness Lodges, Eco vacations



KEY GOALS – PHASE I

01

Stakeholder Education & Engagement

Inform northern stakeholders about the opportunity to attract new, higher yielding visitors who seek unique nature and wildlife focused experiences and build a shared understanding of best practices and consumer expectations. An important outcome will be to build consensus around key product or experience themes founded upon a collaborative working model, and to underscore the potential to increase revenue. Initial sessions could be envisioned for winter 2023-24.

02

Establish Target Geographic Clusters

Collaborate with regional DMOs in prioritizing geographic areas and tourism stakeholders with existing nature or wildlife focused product, who have potential and are open to refining and / or developing new experiences, resources, and infrastructure to meet the expectations of target audiences.

03

Nature & Wildlife Product Themes

Work with DMOs and industry partners to prioritize one or two product or experience themes in each sub- region' which will be the focus of development work in phase one, beginning in 2024. Canadian Signature Experiences could serve as a point of reference and illustrate how other regions and operators have creatively leveraged natural resources and unique geography to develop outstanding tourism experiences.

04

Identify Subject Experts & Resources for Phase One

Source and engage a team of specialists with expertise in key nature and wildlife related themes who will provide input and guidance on development, content, and delivery of tourism experiences. These subject experts may also be engaged in the facilitation and delivery of new tourism product, as interpretive guides, guest speakers or advisors.

DNO could explore the feasibility of partnering with one or two successful Canadian tourism operators who specialize in nature and wildlife themed experiences, as advisors or mentors to product development teams.

In research interviews for this strategy, owners of Churchill based tourism businesses expressed a willingness to share their expertise and host northern tourism partners at their locations. This approach would provide a wealth of insight and learning, and demonstrate concrete results from making a pivot, collaborating, persistence and adapting to new growth opportunities.

05

Create Digital Content & Resources

Begin building a collection of digital resources and content designed to equip northern tourism operators and stakeholders with a framework of well researched materials, references, specialist partners, potential enrichment content, lecture opportunities, available interpretive guides, etc. to support their development work. Content will align with each product theme and be tailored to each specific region or geographic cluster. These resources could be designed and edited by the DNO creative team and shared with stakeholders as part of the TEN industry resources.

06

Progress Tracking and Updates

Establish a framework for tracking each project, team engagement, required resources, leadership of initiatives and outcomes. Share key learning and new concepts with northern stakeholders, demonstrating progress towards attracting new visitors, revenue growth and the value of investing in development, enhancing product and building infrastructure. Information assembled within this framework will feed into TEN and DNO reporting to funders and the Ministry of Tourism, Culture and Sport.



KEY GOALS - PHASE II

01

Nature & Wildlife Product Themes

Assemble and review customer and tourism operator feedback on experiences and product themes. Identify gaps, adjust, and prioritize development activities and investment in each sub region. Complete an audit of select product and programs with a view to quality, authenticity, visitor learning or enrichment, and value provided. Establish guidelines to assist operators and stakeholders with development steps and ensure consistency across the north. Create a network of tourism operator partners who are able and willing to share experiences, successes and failures, and guide and support others.

02

Stakeholder Education & Engagement

Profile success stories and valuable partner resources that emerge as development progresses. Sessions could be offered at the Northern Ontario Tourism Summit and via the TEN suite of training tools and online resources. Develop a series of engaging, creative stories and best practices that will be shared with stakeholders, illustrating new, innovative product and outcomes that will inspire and help build support.

03

Nature Themed Digital Resources

Gather stakeholder feedback, adjust and continue building accessible digital resources and tools that will equip tourism partners for success in delivering meaningful, authentic visitor experiences. It follows that DNO and its partners will continue to expand the network of subject experts with whom stakeholders collaborate to create and deliver nature and wildlife themed programs.

04

Success Stories, Progress Tracking & Updates

Refine the progress tracking framework, evaluate team engagement, required resources, leadership of initiatives and outcomes to date. Share successes and key learnings with northern stakeholders, and funding partners. Progress and priorities will be shared with tourism partners at regular intervals. DNO could facilitate round table “feedback focus groups” with industry partners to identify challenges, gaps and resources required in each sub region.



05

TEN Resources

Evaluate stakeholder feedback and outcomes of phase one activities. Refine, adjust and implement an ongoing suite of tools, training and coaching by TEN specialists, to maintain momentum and expand the range of product themes and experiences across the north.

06

Expand Geographic Clusters

Identify new geographic areas in each sub region where opportunities and stakeholder capacity exist to continue developing and/or refining product that aligns with priority nature and wildlife themes. DMO partners will play a key role in monitoring new developments and identifying partners with real potential to collaborate with DNO and fellow operators.

07

Test Nature & Wildlife Product with International Tour Operators

Present a range of new product and experiences to international product planners in the context of Rendez- vous Canada and other tour operator focused marketplaces, invite feedback, build support and commitment to include new northern product.collaborate with DNO and fellow operators.

A preliminary list of potential stakeholder partners follows on **page 18**.

Phase 2



Potential Product Development Partners

LOCATION	TOURISM OPERATOR	EXPERIENCE OR PRODUCT
NORTHWEST: Lake Superior West, Atikokan, Lake of the Woods, Kenora		
Terrace Bay	Neys Provincial Park	Natural Heritage Discovery Programs: Guided walks, Geology, Evening slide talks, Neys Nostalgia Days, Children's programs, Hiking trails, Bird watching
Thunder Bay	Sleeping Giant Provincial Park	TBD
Wabakimi Provincial Park-Miminiska Lake	Wilderness North	Wilderness, nature experiences & packages; "Quintessential Canada" package
Kenora – Lake of the Woods	Green Adventures	Potential to develop wildlife viewing
Kenora-Lake of the Woods	Grace Anne II Lodge	Wildlife viewing by boat – TBD for FIT visitors (non-resident guests)
Sioux Narrows	Totem Lodge	Wildlife viewing by boat – needs refining
Atikokan	Branch's Seine River Lodge	Quetico Provincial Park – Guided naturalist hikes. TBC
Atikokan	Quetico Provincial Park	Dark Sky Preserve – Astronomy theme in development by Ontario Parks Nature, wildlife themes – huge potential to develop for FIT visitors



LOCATION	TOURISM OPERATOR	EXPERIENCE OR PRODUCT
ALGOMA COUNTRY: SSM, Algoma, Lake Superior East		
Wawa	Naturally Superior Adventures	Water based nature, wildlife observation. Guided hikes
Algoma - Esnagi Lake	Lodge 88	Guided wildlife & nature experiences TBD
Algoma - Kaby Lake	Pine Portage Lodge	TBD – wildlife, bird observation from water. <i>**Quality issue for international visitors</i>
Spanish – La Cloche Provincial Park	Mukwa Adventures	*Authentic, First Nations guided ATV experiences. Wildlife, nature, Indigenous culture & knowledge.
Algoma – L. Superior N. shore	Lake Superior Provincial Park	Dark Sky Preserve. Night sky experiences; nature walks/hikes in development
Algoma – L. Superior N. shore	Pukaskwa National Park	Various Indigenous themed experiences. Nature + Wildlife TBD
Algoma	Blaq Bear Adventures	Nature themed guided interpretive hikes, walks, tours in Algoma country
Algoma	Errington’s Wilderness Resort	Wildlife, nature observation – to be refined.
Algoma	Kensington Conservancy	Bird Watching – rare species

LOCATION	TOURISM OPERATOR	EXPERIENCE OR PRODUCT
NORTHEAST: Sudbury, Manitoulin Island, Killarney, French River, North Bay, Temiskaming Shores, Timmins, Cochrane		
Killarney	Killarney Provincial Park	Astronomy, Dark Sky Preserve – new offerings in development. Guided interpretive hikes – TBD Self-guided nature walks, trails
Killarney	Killarney Mountain Lodge	Nature + Wildlife talks - TBD
Manitoulin Island	Point Grondine	Wikwemikong Experience: Guided interpretive walks – TBD Indigenous culture & the land – Talks TBD
Manitoulin Island	Manitoulin Eco Park Dark-Sky Preserve	Unique Dark Sky, Astronomy based experiences; Aurora Borealis, Full Moon Ecology hikes
Sudbury	Science North	Interpretive displays: nature, wildlife; Dynamic Earth
Temagami	Temagami Outfitting Company	Canoeing expeditions – interpretive content, nature & wildlife observation. To be developed.
Timmins	Cedar Meadows Resort & Wildlife Park	Wildlife viewing in fenced forest setting. *To be qualified for authenticity
Cochrane	Canadian Polar Bear Habitat	Polar bear observation. * To be qualified for authenticity
Elk Lake	Elk Lake Eco Centre	TBD – Wildlife viewing?
Moose Factory	Moose Cree First Nation	TBD – Polar Bears, sea mammals, Guided water-based excursions.



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