

2017

SNOWMOBILE RIDLING

NORTHERN ONTARIO
SNOWMOBILE
TOURISM PLAN



Contents

03	1.0 Tourism Priorities in Northern Ontario
04-05	1.1 TNO Strategic Plan - 2017-2020
06-07	1.2 Marketing Strategy - 2017-2020
08-09	1.3 Product Development Plan & Research
10-17	2.0 Snowmobile Tourism - The Current Context & Research Findings
18-19	3.0 The Case for Snowmobile Tourism in Northern Ontario
20-27	4.0 Snowmobile Tourism Work Plan for Northern Ontario
28-31	5.0 Appendix I: Examples of Existing Snowmobile Infrastructure in Northern Ontario
32-35	6.0 Appendix II: Partnership Roles & Responsibilities Framework
36-43	7.0 Appendix III: SWOTT Analysis
44-45	8.0 Appendix IV: Purpose of the Northern Ontario Snowmobile Product Development Committee
46-47	9.0 Resources



Priorities for Tourism in Northern Ontario

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



Mission

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



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

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

TNO Strategic Plan 2017-2020

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

01 Governance & Administration

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

02 Product Development (including research)

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

03

Marketing

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

04

Workforce & Industry Training

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

05

Investment Attraction

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

06

Partnership

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



Marketing Strategy 2017-2020

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

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

Marketing efforts will focus around:

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

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

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

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

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



TNO Product Development Plan & Research

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



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

The reports focus on the following areas:

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

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

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

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



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.



Snowmobile Tourism – the Current Context & Research Findings

Case Studies
Ontario
& Beyond



Gold Rush Snowmobile Trail – Business Plan

The Gold Rush Snowmobile Trail was formally endorsed by the British Columbia Provincial Government in the Cariboo-Chilcotin region of B.C. The intent was to create a snowmobile trail network with the objective of linking smaller, isolated communities throughout the region. In 2012, a business plan was created to assist with marketing/sales, trail development/maintenance strategies, partnership opportunities, governance considerations and funding considerations. The business plan recommended a phased approach to infrastructure improvements.

Following the report, the area of South Cariboo implemented the first phase of the business plan recommendations and noted a direct economic spin off connected to construction and project management employment from the trail development. The improved trails have enticed travellers to visit 100 Mile House and regional communities, participating in additional recreational activities and local attractions. New signage along the trails advertises local amenities and hotels, encouraging tourists to stay in the South Chilcotin area.

2 Revelstoke Snowmobile Society – Snowmobile Strategy

Revelstoke, British Columbia is one of North America’s premier snowmobile destinations. The snowmobile infrastructure has been maintained by the Revelstoke Snowmobile Club and the Snowmobile Revelstoke Society, both established non-profit volunteer organizations. With the increase of usage in these snowmobile areas, both organizations had expressed challenges to maintain the infrastructure with limited capacity, resources and limited volunteer base. In 2001, the City of Revelstoke formed a steering committee to work with both of the maintenance groups to create a *Revelstoke Strategic Snowmobile Tourism Management Plan*.

The plan’s objectives were to address: the current snowmobiling context including regulatory frameworks, economic impacts, carrying capacity and ecological integrity of the land; the quality of experience for all backcountry users and inhabitants; sufficient parking with safe access; resources and infrastructure are developed for the increasing demand; a communication plan to not only promote snowmobile tourism but also snowmobiler’s responsibilities to others; and the capacity for trail grooming; fee collection, services and enforcement of rules.





Top Secret Boondocking (Wawa, ON) – Target Marketing

A highly-targeted marketing campaign was created in the 2014/2015 season in Wawa, Ontario in an effort to position Wawa and surrounding area as Ontario's destination for off-trail free riding or boondocking. The entire campaign hinged on speaking directly to the target market to motivate them to travel to Wawa. The campaign strategies included micro site development, video, in-market collateral and digital ads targeted at riders from Michigan, Wisconsin and Northern and Southern Ontario.

The campaign strategy has been extremely successful with hard measurement metrics in place. This demonstrates that with the right product/market match, resources can be extremely efficient when niche types of snowmobiling riding are marketed directly to the targeted consumers. The campaign continues to grow throughout 2017 and resonates with consumers. Strong consumer engagement, targeted messaging and the right product/market match have put Wawa and the Top Secret Boondocking location as a "must ride" destination for backcountry snowmobilers.



Quebec Snowmobiling – Partnership Development

As indicated by the *Canadian Trails Study: A Comprehensive Analysis of Managed Trails and Trail Users* commissioned by the National Trails Coalition in 2010, the Province of Quebec has **77,000** kilometres of managed trails through an extensive network of hiking, cycling, snowmobiling and ATV/ORM trails. Snowmobiling and snowmobile tourism is a large economic driver for the province. Snowmobile trails make up **31,745** kilometres of the total and represent the largest proportion of single-use trails over any other type of activity². La Fédération des clubs de motoneigistes du Québec, founded in 1974, is made up of **209** snowmobile clubs and each year over **4,500** members volunteer more than **800,000** hours of time to maintain the snowmobile trail network.

Through focused partnerships between snowmobile associations, local clubs and Quebec's Department of Transportation to coordinate trails management responsibilities, single-use trail development has flourished throughout the province. The Canadian Council of Snowmobile Organizations noted that the economic impact of snowmobiling in the 2011 season in Quebec was over **\$2 billion** dollars which included direct expenditures by snowmobilers, trail maintenance activity and the manufacture and sale of both snowmobiles and trail grooming equipment.

² Canadian Trails Study: Comprehensive Analysis of Managed Trails and Trail Uses Dec 2010 by Terrance Norman. Report Commissioned for the National Trails Coalition.



Minnesota Snowmobiling – Improvement Program

Minnesota United Snowmobilers Association (MNUSA) developed a *Snowmobile-Friendly Community Program* to enhance tourism and snowmobile opportunities, improve safety and generate the partnerships that are essential to the snowmobile trails. The program was used as the base model for a national program created by the American Council of Snowmobile Associations with the support of the U.S. Department of Transportation. This program demonstrated how a regional program can help raise the bar for all snowmobiling experiences across both the state and the country through a formal designation program based on targeted and specific criteria.



Abitibi Canyon Loop – Media Attention

The Abitibi Canyon Loop is a 303-kilometer trail on one of Ontario's farthest north-reaching groomed snowmobile trails near the communities of Cochrane and Smooth Rock Falls. The looped trail features expansive hydro corridors and views of the Abitibi River and rides into the James Bay lowlands. The trail has received considerable national and international media attention from American Snowmobiler Magazine, Snow Goer Canada, and Go Snowmobiling Ontario Magazine thanks to its consistent snowfall, well-maintained and signed trails and the combination of snowmobile-friendly amenities including guided tours offered by local operators.

Current Provincial Snowmobile Focus

The OTMPC's 2017/2018 marketing strategy indicated that the Province will be targeting its marketing efforts and messages to "avid consumers" who are defined as travellers who have a passion and commitment for a specific outdoor activity and travel specifically to engage in that activity. Avid travellers include anglers, hunters, power sport enthusiasts and outdoor adventurers. They may also become members of the OTMPC's identified consumer segments.

OTMPC's primary role is to market Ontario as a tourism destination provincially, nationally and internationally in partnership with tourism stakeholders. OTMPC focuses its Northern Ontario marketing activities within Ontario, New York, Pennsylvania, Michigan, Illinois, Wisconsin, Minnesota and Manitoba.

This provincial marketing emphasis aligns with TNO's 2017-2020 marketing strategy which prioritizes positioning Northern Ontario's unique experiences as the key element to the offer and utilizing Northern Ontario's competitive advantage of accessible, pristine outdoors/wilderness in marketing.

A 2014 report commissioned by the Ontario Federation of Snowmobile Clubs (OFSC) retained Harry Cummings and Associates (HCA) to study the economic impact of snowmobiling across Ontario during the 2013-2014 season³, as an update to studies completed in 2005, 1997 and 1989. Using the data from the *Economic Impact of Snowmobiling in Ontario: Assessment of the 2013-2014 Snowmobiling Season* report, HCA was able to calculate the economic impact of snowmobiling using the Ontario Ministry of Tourism, Culture and Sport's Tourism Regional Economic Impact Model (TREIM).

The study findings indicate:

- **\$853,263,840** was spent by snowmobilers riding in the province (tourism and local combined spending)
- This spending contributed to an increase of **\$369.4 million** in direct GDP and a total of **\$731.3 million** in GDP including direct, indirect and induced GDP impacts.
- Direct employment from the season's snowmobile expenditures resulted in **7,292** equivalent full-year jobs.
- Including indirect and induced employment, there were **11,307** jobs generated by the industry in 2013-14.

³ *Economic Impact of Snowmobiling in Ontario: Assessment of the 2013-2014 Snowmobiling Season*, Prepared by Harry Cummings & Associates for the Ontario Federation of Snowmobile Clubs

Northern Ontario's Current Snowmobiling Situation

Tourism Northern Ontario's study, *Snowmobiling Tourists in Northern Ontario (RTO13): A Situation Analysis* completed by Research Resolutions & Consultants in 2014 indicates:

Snowmobile tourists spent about **3% or \$23.6 million** of the **\$687.0 million** total spent by all Canadian overnight tourists in RTO13.

Throughout Ontario, **\$76 million** is directly spent on snowmobiling tourism, of which **\$23.6 million** ends up in Northern Ontario (**31%**)

Snowmobiling is a very niche market in terms of the larger overall tourism spend in RT013 (**3% of the spend**), but Northern Ontario receives close to **1/3** of the total snowmobile tourism spending for the entire province of Ontario.

Canadian snowmobile trips last (on average) between **2-4 nights**. Physical distance to reach Northern Ontario (from Southern parts of the province) may influence a visitor's considerations to travel to the region due to increased fuel costs and potential additional lodging requirements connected with a longer trip duration.

Only **6%** of the **343,000** nights spent by Canadian snowmobile tourists in Northern Ontario are in the region's paid, roofed lodging as often visitors will stay in private homes and cottages.

With so few of their nights in commercial properties, snowmobile tourists contribute to touristic activity and spending in Northern Ontario's other tourism sectors but do not represent a particularly promising market opportunity for the lodging sector.

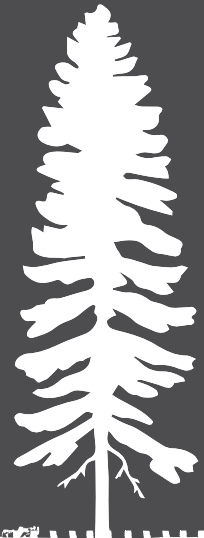
The average spend per trip is **\$335** for domestic snowmobiling tourists in all of Canada. It is **\$330** per trip when in RT013 and **\$230** when in other parts of Ontario. This is attributed to the fact that the north's snowmobilers take trips that are, on average, about twice as long (**4.3 nights**) as snowmobilers in Southern Ontario (**2.2 nights**).

It should be noted that not all snowmobilers travelling within RT013 are considered traditional tourists (due the geographic scale of the region). These recreational users directly contribute to the economy with fuel purchases, restaurant meals and occasionally paid roofed lodging but do not bring new dollars into Northern Ontario.



Target market details explored in the Northern Ontario Snowmobile Summit Report 2014 as indicated in the excerpt from The Rider Experience presentation of survey results indicates that:

- **77%** of riders stayed in Ontario
- **50%** will not trailer their snowmobile
- **30%** will travel **3.5 hours** from home (North Bay/Sudbury)
- **17%** will travel **4-6 hours**
- **8.5%** will travel **6-8 hours** (New Liskeard)
- **5.5%** will travel **9+ hours**
- **47%** of riders **will not** stay overnight
28% of riders will stay over **1-4 nights**
16% of riders will stay over **5-9 nights**
- **85%** of riders designated tourism loops as a priority
- **25%** of riders identify distance (border to border) as a low priority
- **7,500** permits issued to Americans in the 90's – In 2012, **1,500** permits



To start the discussion around snowmobile product development in Northern Ontario, a focus group session was held in 2015. The meeting included a conversation surrounding the roles and responsibilities of different snowmobile tourism partners in Northern Ontario as well as a SWOTT analysis (**see Appendix III**). For more information on the Northern Ontario Snowmobile Product Development Committee, its role and purpose, please see **Appendix IV**.

Further, the Northeast Community Network recently undertook a snowmobile destination plan, *Building the World's Best Snowmobile Destination*⁴. The report, which provides a five-year plan for enhancing existing snowmobile product, developing new product and providing snowmobile tourists with best-in-class experiences aims to increase snowmobile visits and spending in the area as well as economic growth.

Managed by a not-for-profit organization working with a project manager, tactics implemented are proposed to centre around:

- Product development related to trail, culture, training, wayfinding, standards and unifiers, and safety development;
- Communication to engage stakeholders and encourage collaboration; and
- A financial plan that includes partnerships for sustainability. The plan is anticipated for implementation by 2021.

⁴ Northeast Community Network, *Northeastern Ontario Snowmobile Destination Plan – Building the World's Best Snowmobile Destination*, 2016.

77%

of riders
stayed in
Ontario



30%

will travel
3.5 hours
from home



17%

will travel
4-6 hours
from home



8.5%

will travel
6-8 hours
from home

5.5%

will travel
9+ hours
from home



47%

will not
stay
overnight



28%

will stay
over 1-4
nights



16%

will stay
over 5-9
nights

The Case for Snowmobile Tourism in Northern Ontario

Several factors make snowmobiling a product for further development in Northern Ontario:



Northern Ontario can take advantage of its natural wilderness landscape and consistent winter snowfall to enhance and support its snowmobiling tourism product.

- The Northern Ontario Product Development Strategy lists snowmobiling as a product area for focus; however, the level of focus is identified as tertiary indicating that the product may have less opportunity from a product/market match perspective than other drivers of tourism activity in Northern Ontario.
- Northern Ontario captures close to **1/5th (21%)** of all domestic snowmobiling tourism within the province and close to **1/3rd (31%)** of all snowmobile tourism spending. Northern Ontario benefits from having the volume of snowmobile products to create a critical mass appeal and its geographic distance from target markets means user trips are longer and therefore include increased spending on amenities (accommodation, food, fuel).⁵
- **77%** of domestic riders stayed within the province, meaning barriers to travel are reduced, as Ontario residents are the primary users of Northern Ontario snowmobiling trails.⁶
- The provincial marketing focus on avid consumers and travellers as connected with 'powersports' has led to substantial media and marketing attention in the promotion of snowmobile tourism in Ontario.
- Snowmobiling as a product matches *TNO's 2017-2020 marketing strategy* priorities which emphasises the need to continually improve and adapt existing Northern Ontario tourism products, targeting avid and niche travellers with a "consumers first" philosophy.

⁵ Tourism Northern Ontario's study, *Snowmobiling Tourists in Northern Ontario (RTO13): A Situation Analysis* completed by Research Resolutions & Consultants in 2014

⁶ *Northern Ontario Snowmobile Summit Report 2014* as indicated in the excerpt from The Rider Experience presentation



Northern Ontario captures close to

21%

of all domestic snowmobiling tourism within the province

– AND –

31%

of all snowmobile tourism spending within the province

Photo: OTMPC

Snowmobile Tourism Work Plan for Northern Ontario

The following work plan is adapted from the input received from the Northern Ontario Snowmobile Product Committee as well as priorities identified at the Tourism Northern Ontario Snowmobile Summit held in Sault Ste. Marie in 2014.

There are several steps required to further develop snowmobile tourism in Northern Ontario. The steps are organized in a specific order, designed to determine the market for snowmobile tourism, the snowmobiling product available in Northern Ontario and to allow TNO to determine the opportunity related to proceeding with strategic snowmobile tourism investment.



5 Steps to Developing Snowmobile Tourism in Northern Ontario:





STEP 1: Assess & Address Industry Issues

As there are many moving parts involved in supporting and enhancing snowmobile tourism in Northern Ontario, it is essential to understand where the issues are and where duplication between stakeholders, local clubs, communities, regions and the Provincial and Federal Governments is occurring.

It is recommended that the Snowmobiling Product Development Committee and/or a TNO representative work with OFSC and OTMPC to expand the Partnership Roles and Responsibilities Framework (**Appendix II**) to include goals and priorities and allocate which party is responsible for each item.

This will assist with the creation of a list of items that TNO is responsible for and identification of where TNO can support its partners. Defining the industry issue and party responsible for its development will allow TNO to focus on specific tasks and support the appropriate party where necessary to further enhance the snowmobiling tourism experience throughout Northern Ontario.

Activities addressed within this framework should also be categorized by classification of controllable and uncontrollable items.

└ **Timeline:** Short term to Long term

As an example, industry issues within TNO's control may include items such as:

- Broadly communicate to partners and stakeholders OTMPC support for marketing motorsports;
- Continue to engage snowmobile stakeholders (including at the grass-roots level), communities and interest groups to generate greater interest and buy-in to advance Northern Ontario as a snowmobiling tourism destination;
- Advocate to all levels of government for more active involvement and support for Northern Ontario snowmobiling tourism;
- Assess, review and develop new or enhanced snowmobiling tourism product(s) in Northern Ontario; and
- Monitor changing industry trends including environmental scans, permit data, number of riders on trails and recreational user patterns.

Northern Ontario Snowmobile Product Development Committee Role:

- Participate in meetings and provide input and feedback to the proponent undertaking the expanded roles, responsibilities and industry issues assessment and recommended action plan.
- Continue to communicate to stakeholders and partners in an effort to support internal and partnership initiatives related to snowmobile tourism in Northern Ontario.

01

02

03

04

05

STEP 2: Asset Inventory & Market- Readiness Assessment

It is recommended that the next step in the work plan for snowmobiling tourism in Northern Ontario is to complete an inventory of all the existing snowmobiling assets in Northern Ontario. This inventory will create an understanding of the product that exists in the region and allow for a more coordinated effort for regional trail development. The inventory should indicate the trail/route as well as the supporting community and should also outline elements such as infrastructure and visitor amenities, proximity to market and tourism operators in the area.

Timeline: Short term

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

- Understand key trails and linkages to local communities
- Understand gaps in product, number of trails, location of trails, routes, tours
- Understand supporting businesses/ services, amenities and gaps.
- Understand existing infrastructure needs, gaps and duplication
- Determine capacity of accommodators to service snowmobilers



Photo: OTMPC

A market-readiness assessment is required to determine what snowmobile tourism experiences already exist in the region and the state of development of each experience. Within this market readiness assessment, the following items should be considered:

- Development of a comprehensive snowmobile experience assessment criteria - research components and characteristics of “best in class” tours/ trails/loops as related to snowmobile experiences;
- Market-readiness of key snowmobile loops;
- Market-readiness of key backcountry destinations;
- Market-readiness of key supporting operators;
- Market-readiness of key supporting visitor amenities;
- Market-readiness of key partnerships, required infrastructure and support mechanisms; and
- Opportunities for linking key, market ready assets to create visitor-friendly loops with the ability to entice medium- and long-haul riders.



The assessment will keep in mind that traditional long-haul snowmobile travellers are looking for looped trails that offer unique riding and that boondocking riders are in search of deep snow and interesting features.

The market-readiness assessment should be a more robust version of OFSC’s current “Ride Ready” criteria established in 2014 in an effort to reflect rider experience needs (i.e amenities, scenic assets, etc). The market-readiness assessment undertaken should strive to formalize the inspection/ approval/ audit process on an ongoing basis to ensure quality and consistent products are being developed and marketed to the consumer.

Completing this will allow TNO to highlight existing snowmobile experiences that are ready to be marketed. It will also point out existing products needing adjustments and where additional product development can create a market-ready snowmobile tourism experience in Northern Ontario. The market-readiness assessment will highlight best bet areas and routes, and ways to make them better, allowing TNO to prioritize snowmobile product development activities.

Northern Ontario Snowmobiling Product Development Committee Role:

- Provide input and feedback to the proponent undertaking the inventory and market-readiness assessment
- Review market-readiness outcomes and, based on findings, provide input to TNO regarding snowmobile product for further development



STEP 3: Identify Product Development Opportunities

After completing the asset inventory and market-readiness assessment, the research should be used to determine two new types of snowmobiling tourism opportunities and priority areas for Northern Ontario:

J Timeline: Medium to Long term

- a) Existing snowmobile tourism assets with the potential for further enhancement
- b) Find new snowmobile tourism product opportunities through the identification of product gaps

a The market-readiness assessment will indicate which additional key experiences could be enhanced and/or packaged to increase the appeal of the Northern Ontario Snowmobile offer. Enhancements may be needed in the form of infrastructure developments, partnership support, linking of trails to create loops, or the development of a consumer package offer, connecting communities with visitor amenities, routes and assets.

Developments should encourage packaged experiences that create partnerships with local businesses to create an experience that enhances the snowmobile ride.

Enhancements to the existing product may include, for example:

- Packaging, theming and looping of experiences;
- Better on-trail signage for riders;
- Advanced rider notice regarding limited amenities including fuel and food along routes;
- Consideration for current enhancement to support future developments (i.e. centralized booking systems simplify process for consumer while allowing for streamlined collection of data needed for future investment and attraction).

It should be noted that the snowmobiling product cannot be marketed in isolation.

It is suggested that these identified experiences be overlaid with the asset inventory list to see if location-specific product is saleable to the consumer by asking the questions:

- Is there a market for the product?
- Is the product market ready?
- Are there supporting operators available to service the product?



Photo: OTMPC

b

The asset inventory should be used to indicate additional product development opportunities (where gaps or missing inventory exist) in current snowmobiling tourism product. When determining what new opportunities should be undertaken, the inventory should be reviewed considering:

- The ability to fulfill an existing gap or need (service-, industry-, infrastructure- or experience-related);
- The ability to link backcountry riding to OFSC-established trails where current links don't exist;
- The best bet market matching possibilities;
- The potential for further backcountry riding sites with high touristic value that are accessible to target market riders; and
- The potential economic impact of the product to allow TNO to invest wisely. For example, currently the research for snowmobile tourism in Northern Ontario indicates that the majority of snowmobile tourists stay in private lodging. TNO should consider what opportunities exist to develop product that would have them stay in paid lodging to increase spending.

Northern Ontario Snowmobiling Product Development Committee Role:

- Provide input into product development gaps and future opportunities identified for development and enhancement
- Advocate to have enhancements to existing products implemented

01

02

03

04

05

STEP 4: Leverage Partnerships

Utilizing the roles and responsibilities framework created in **Step One** to further leverage existing partnerships will be beneficial for TNO. This document will work to identify both the task and party responsible for the specific item or issue in order to minimize duplication and provide leveraged support for partner activities which collectively enhance snowmobile tourism as a whole throughout Northern Ontario.

Partnership opportunities should also be considered to further enhance trail development, regional/multi-trail signage opportunities, data collection to support investment, workforce development, destination marketing and corporate partnerships.

Timeline: Long Term

As new funding opportunities become available, TNO can prioritize product development projects as identified in **Step Two** (Asset Inventory & Market Readiness Assessment) and take into consideration the Roles and Responsibilities Framework (**Step Three**) to effectively match priority product development initiatives with appropriate partnership opportunities.

Northern Ontario Snowmobiling Product Development Committee Role:

- Review potential partnership funding opportunities, which could enhance existing and/or develop new snowmobile tourism product in the region. Assist with funding applications where expertise and administrative ability exist;
- Assist with partnership building (enhancement of existing and leveraging of new).



PHOTO: VIRGIL KNAPP



STEP 5: Snowmobile Marketing & Communication Plan

The Market-Readiness Assessment will utilize a "best in class" criteria to evaluate existing snowmobiling products in Northern Ontario. This document will indicate which of the existing products have the potential to be marketed through a Northern Ontario snowmobile tourism marketing plan.

Products which have met the criteria and have supporting elements in place will be ready to be marketed through a defined marketing implementation plan which outlines how these experiences are to be presented to the consumer.

Working with the OTMPC, a communication plan should be created and deployed to stakeholders, highlighting why these initial snowmobiling experiences were selected for promotion. This should be done so that stakeholders understand the best in class criteria, and to help raise awareness of the incentives connected with increasing the quality of snowmobiling experiences in Northern Ontario.

J Timeline: Medium term

Northern Ontario Snowmobiling Product Development Committee Role:

- Review marketing and communications plan and provide feedback on recommended tactics



Photo: OTMPC

APPENDIX I:

Examples of Existing Snowmobile Infrastructure in Northern Ontario



BACKCOUNTRY/ OFF TRAIL RIDING

Abitibi Canyon

Cochrane/Smooth
Rock Falls area

Off trail boondocking in Abitibi Canyon

**Top Secret
Boondocking**

Wawa

Off trail boondocking in Wawa





TRAIL RIDING

Abitibi Canyon Tour	Cochrane/ Smooth Rock Falls area	300 km loop with Cochrane as the entry point to Northern Corridor trail system. Community sign in Cochrane highlights as “The World’s Best Snowmobile Trails” Views of Abitibi River dam and off-trail riding available from this loop
Bobcat Loop	Hornepayne area	90 km loop with local wildlife and snowmobile friendly community
Cartier Moose Loop	Sudbury area	253 km loop through Coniston, Azilda, Chelmsford, Capreol
Chiniguchi Wolf Loop	Sudbury area	233 km loop through Garson, Coniston, Capreol
North Shore Loop	Elliot Lake/ Sudbury/ Sault Ste. Marie / St. Joseph Island area	This new Algoma trail can be staged from the East (Elliot Lake – 741 kms/Sudbury – 1049 kms) or the West (Sault Ste. Marie – 626 kms) and takes sledders through pristine wilderness areas. The St. Joseph Island Loop can be added for another 140 kms of touring.
Explorers Snow Tour	Mattawa, Bonfield area	234 km Visit the 10 Points of Interest in the North Bay/Mattawa area. These include Explorer's Point, Bird's Eye View, Mica Mine, Redbridge Lookout, Stepping Stones, Devil's Canyon, Boulter View, Pioneer Springs, Amable du Fond and White Pines.
Gateway to the North Tour	Cochrane/ Smooth Rock Falls area	215 km tour with scenic hydro corridors, Greenwater park
Gateway to Ontario Tour	Manitoba border to Ontario	130 km (Ontario section only)
Gold Rush Tour	Timmins area	670 km tour through New Liskeard, Gowganda, Timmins, Kirkland Lake with diverse scenery agricultural lands through deep forests, hydro corridors

APPENDIX II:

Partnership Roles & Responsibilities Framework



PARTNERSHIP ROLES & RESPONSIBILITIES

Partners/ Stakeholders

Roles & Responsibilities

Tourism Northern Ontario

- Collaboration, communication and culture shift advancing snowmobile tourism while adhering to the organization's mandate
- Aligning activities with the Ministry of Tourism, Culture and Sports mandate
- Lead the planning and communication process
- Lead the process to motivate all levels of stakeholders to buy into snowmobiling tourism product development
- Priorities identification and filling capacity gaps where appropriate and within jurisdiction
- Coordination to leverage funding
- Coordination of product development, investment attraction, training and marketing in keeping with the four main pillars
- Facilitate research



PARTNERSHIP ROLES & RESPONSIBILITIES CONT'D.

Partners/ Stakeholders	Roles & Responsibilities
Sub-Regions/ DMO's	<ul style="list-style-type: none"> • Coordination and communication role between TNO and communities • Important intermediary to influence communities to buy into the snowmobiling tourism development • Leverage funding through partnerships • Marketing – coordinating with districts, clubs and regional marketing organizations • Communication across several layers using all available channels and media • Product development • Communication, engagement and recruitment of community snowmobiling stakeholders • Coordination and alignment
OTMPC	<ul style="list-style-type: none"> • Identification of opportunities and coordination with industry • Through the marketing strategy, implement a marketing program to coordinate and integrate opportunities to take to market • Conduit, coordination between sub-regions • Market research
Government	<ul style="list-style-type: none"> • Create enabling climate • Influence the regulatory framework to support snowmobiling tourism



PARTNERSHIP ROLES & RESPONSIBILITIES CONT'D.

Partners/ Stakeholders	Roles & Responsibilities
OFSC	<ul style="list-style-type: none">• Lobby government for change when needed• Snow tours resource stewards• Trail management and grooming• Coordination of districts and clubs to manage trails and provide the desired land base conditions that raise the riders' experience• Communication and awareness – engaging districts and clubs to promote the benefits of tourism• Permit sales and monitoring• Trail Liability insurance
Districts & Clubs	<ul style="list-style-type: none">• Manage and keep trails in good condition on behalf of the OFSC• Assist in marketing• Work with volunteers, communities, communicating, encouraging coordination and gathering intelligence
Operators	<ul style="list-style-type: none">• Providing packages that facilitate and offer quality experiences• Communication – communicate to DMO's, sector organizations and TNO where there are gaps in the experiences• Alignment of marketing





Photo: OTMPC

APPENDIX III:

SWOTT Analysis

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



- Increase in participation
- Smaller groups of 3 or 4 rather than 10-20 (couples and family)
- Single riders
- Product - move to destination snowmobiling
- Technology and manufacturing - offer of adventure ride and backcountry riding

- Change in OFSC trail system - snow tours - turn key product
- Collapse in community-based snowmobiling

- Groups are aging and they are smaller
- Shift in corporate organization - build for the future in efficiency in operation to have a future
- Things need to change to have snowmobiling in the North; need paid people
- Re-organizing and becoming efficient in operations is key to success



Common Themes as noted by this group:

The existing snowmobiling product is no longer relevant to today's realities of economy, communities, consumer needs; the product needs to be revamped.

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

- Full-service tours/ rentals – packages; all-inclusive experience with hotels
- Marketing tours and working together on packages
- Consistent products
- “Friday the 13th” snowmobile rally/ thematic style
- Event-based snowmobiling – consistency

- Opportunity to become world’s best snowmobile destination – upgrade product – technology

- Legislation change, flexible insurance, rentals, change in liability policy
- Backcountry riding; identify key areas, or park-like destinations for backcountry riding (locate, identify, brand).
- Provincial/federal governments back industry through tax dollars
- Groomed off-trail product development



Common Themes as noted by this group:

- Create backcountry snowmobile products.
- Heighten existing product; create/develop strong knowledge of how great product is.



Photo: OTMPC



+ STRENGTHS

- + Greater likelihood of snow and longer winter season.
- + Variety in destination choices.
- + Wide open trail riding.
- + Snowmobile-friendly communities and operators.
- + A high percentage of out-of-province consumers find Ontario snowmobiling enjoyable
- + Existing extensive network of Ontario Federation of Snowmobile Clubs (OFSC) and other organized trails in place.
- + Accessible Crown lands provide backcountry riding opportunities.
- + Trails are not crowded and are less damaged by traffic compared to other areas.
- + More established snow tours than any other region in Ontario.
- + New “dollars go where the snow is” permit system provides substantial revenue for Northern Ontario trails.
- + OFSC trail permits can be purchased online.
- + OFSC has strong track record with respect to managing liability.
- + Connection to an international trail network.

- WEAKNESSES

- Insufficient amenities in some locations to service snowmobile tourists.
- Lack of coordination and challenges in dealing with the geography/grooming.
- Gaps in trail networks.
- Reliance on volunteers to provide grooming and other services.
- Lack of coordinated marketing.
- Information on snowmobiling is not centralized and this sends confusing signals to consumers. One window/website presence is required.
- Long travel distance for many to get to Northern Ontario.
- Lack of a compelling Northern Ontario brand for snowmobiling.
- Low population density and primary industry workers leaving the region reducing options to attract local volunteers and riders.
- The lack of signage related to distance, location and amenities (fuel, food, and lodging) have also been expressed as a significant issue to the tourist rider.
- Northern Ontario is experiencing challenges that other parts of the Province don't have; connectivity/trail links, closing of District 16, lack of a designated spokesperson for the North,
- “Buy where you Ride” does not always enhance revenues, and the current business model is no longer sustainable in some locations.



OPPORTUNITIES

- Local equipment purchases and rentals can positively impact the local economy.
- Changing attitude by consumers towards the price of permits.
- Free snowmobile weekends appeal to American snowmobile tourists.
- Grow guided tour and sled rental companies to service expected increase in ridership.
- Tourism industry and operators can build on established snow tours.
- Increased demand among riders for backcountry experiences.
- Take advantage of riders looking for new places to go who ride in other regions with less snow or inconsistent trail conditions.
- Develop and promote both regional (club/district) and large-scale 'festival' events.
- Communities working together to improve overall Northern snowmobiling experience in a coordinated and cooperative manner.
- Explore potential to resurrect loops that have high snowmobile tourism values, i.e., the Lake Superior Snow Trail loop.
- Explore extreme snowmobiling opportunities in areas along the Lake Superior coast due to their unique scenery and vistas.
- New funding opportunities available when there is a unified Northern Ontario snowmobiling strategy in place.
- Establish family-, couple- and senior-friendly day-ride options around major city centres.
- Ice fishing is a marketing opportunity to be explored along with snowmobiling.
- Engage accommodations sector and all levels of government into discussions of the snowmobile tourism industry potential.
- Potential for packaging with business along the trails and in gateway cities (accommodations, transportation, etc.).
- A more centralized campaign to promote signature snowmobiling events along with the addition of new initiatives will contribute to keeping Northern Ontario on the map as a snowmobile tourism destination.



THREATS

- High cost of transporting equipment.
- High permit cost compared to neighbouring markets.
- Consistent product from competing destinations.
- Roadblocks through legislation, insurance, rules and regulations (i.e., Technical Standards and Safety Authority fuel regulation) and liability policies.
- Border crossing restrictions and cumbersome procedures.
- Inconsistency of trail enforcement.
- Urbanization and aging population leads to fewer volunteers being available.
- Emergency services response time given terrain and geography.
- The reliability of permit sales to operate clubs and maintain the product is becoming increasingly difficult to manage. If the revenue is not generated, the trails are not groomed and the trail network is only as strong as the clubs can accommodate.
- Snowmobiles are expensive to purchase, service, and operate.
- Road access is necessary for a snowmobile owner to bring equipment with him/her to the destination.
- For non-owners, rental costs for day or longer touring trips are high. For example, a Northern Ontario rental company rents Ski Doo Renegade 1200s for \$350 per day.





Photo: OTMPC



TRENDS

- With rising costs of fuel, aging riders, uncertain snow in certain regions, machine manufacturers are adapting machines to have improved riding positions, suspension, advanced technologies in the engine, durability and better fuel consumption.⁷
- Increase in utility, mountain, backcountry and cross-over categories of snowmobile models due to increasing U.S. sales in the western part of the country and a decrease in eastern U.S. sales.⁸
- Sales of trail snowmobiles are decreasing.⁹
- New snowmobilers prefer backcountry riding and used groom trails to reach these backcountry destinations.¹⁰

⁷⁻¹⁰ Trends in Snowmobile Industry – www.sledmagazine.com/actions/page?docId=6418

APPENDIX IV:

Purpose of the Northern Ontario Snowmobile Product Development Committee

Members of the Snowmobile Product Development Committee were selected based on their experience in snowmobile 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 members aid and advise TNO on the enhancement and development of snowmobile 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 snowmobile tourism in Northern Ontario and utilizes their feedback and advice to action this product niche.



Photo: OTMPC

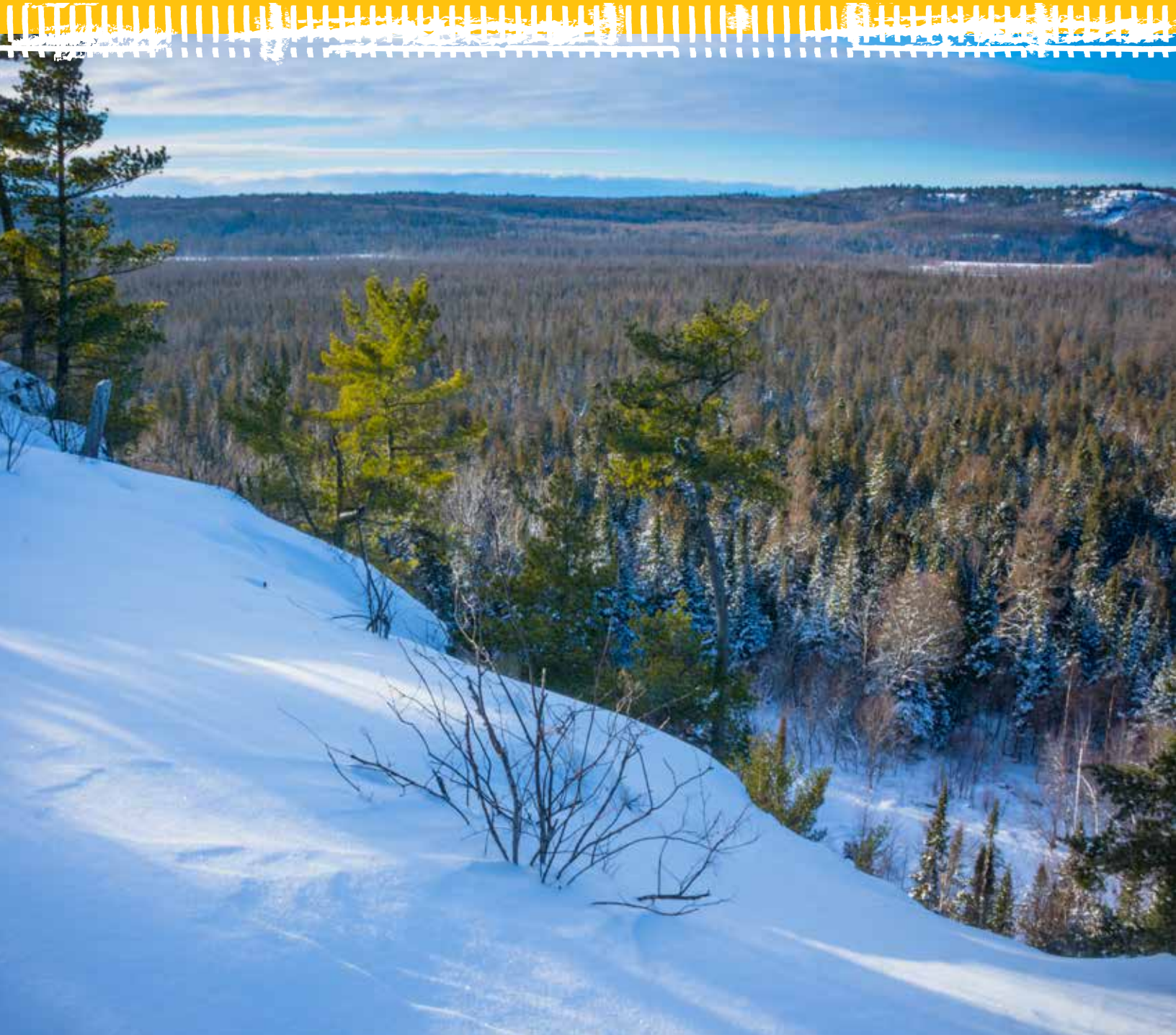
Role of the Snowmobile Product Development Committee

Team members use their wisdom, coupled with research, to support work undertaken by TNO with the purpose of attracting more snowmobile visitors to Northern Ontario with the main objectives of offering a world class experience, resulting in tourists staying longer and spending more money. They will also encourage activities that support the development of snowmobile tourism products that are complimentary and coordinate well with other product niches in a sustainable way.



Snowmobile Product Development Committee Members

NAME	ORGANIZATION	TELEPHONE	EMAIL
Kim Cross	Atikokan Sno-Ho Snowmobile Club	807-929-2245	kdcross@tbaytel.net
Carol Caputo	Algoma Kinniwabi Travel Association	705-254-4293	carol@algomacountry.com
Claude Aumont	Ontario Tourism Marketing Partnership Corp.	705-845-8354	w.aumont@gmail.com
Craig Nicholson	The Intrepid Snowmobiler	416-699-3359	ofscmedia@dmaproductions.ca
Graham Campbell	Ontario Ministry of Northern Development and Mines	705-235-1665	graham.campbell@ontario.ca
Jeff McGirr	Yamaha Canada	705-498-1892	jeff_mcgirr@yamaha-motor.ca
Jeremy Van Hoek	Sault Ste. Marie Snowmobile Club	705-206-2322	jeremyvanhoek@gmail.com
Sean Mackey	Hotelier	705-647-7357	quality@nt.net
Pat Dubreuil	Snowmobiling District 13 General	705-626-0666	pat.dubreuil@lric.ca
Shelly Simon	Silver Mountain Station	807-475-4406	info@SilverMountainStation.com
Steve Bruno	Ontario Tourism Marketing Partnership Corp.	226-339-2510	steve.bruno@ontario.ca



RESOURCES:

2014 Tourism Northern Ontario Snowmobile Summit Report
tourismnorthernontario.com

Gold Rush Snowmobile Trail

- goldrushsnowmobiletrail.com/
- <http://www.northerndevelopment.bc.ca/explore-our-region/success-stories/100-mile-house-creates-a-web-of-opportunities/>
- http://54.218.59.77/_Uploads/GRST%20Business%20Plan.pdf

Ontario Federation of Snowmobile Clubs

www.ofsc.on.ca

Revelstoke Snowmobile Society

www.cmiae.org/wp-content/uploads/reference142.doc

Sno Barons Snowmobile Club

www.snobarons.com

Tourism Northern Ontario, Snowmobiling Tourists in Northern Ontario (RTO13): A Situation Analysis

tourismnorthernontario.com/wp-content/uploads/2016/10/RTO13-Snowmobile-Report-Final-Jan-15.pdf

Trends in Snowmobile Industry

www.sledmagazine.com/actions/page?docId=6418

Canadian Council of Snowmobile Organizations- (Quebec Economic Data)

www.ccsso-ccom.ca/key-economic-data/

National Trails Commission Canadian Trails Study

www.ntc-canada.ca/pdf/NTC-Canadian-Trails-Study.pdf

Top Secret Boondocking, Wawa Ontario

topsecretboondocking.com/

American Council of Snowmobile Associations Snowmobile Friendly Community Program Guide

www.snowmobileinfo.org/snowmobile-access-docs/Snowmobile-Friendly-Communities-Program-Guide.pdf

Northeastern Ontario Snowmobile Destination Plan – Building the World’s Best Snowmobile Destination

Northeast Community Network, 2016.



Tourism Northern Ontario
111 Elgin Street, Suite 304
Sault Ste. Marie, ON P6A 6L6

T: 705.575.9779

F: 705.575.9780

E: info@tourismnorthernontario.com
tourismnorthernontario.com