



NORTHERN ONTARIO

Sustainability Tourism Product Development Strategy

Ontario 

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CONTENTS

- 03** Introduction
- 06** Destination Northern Ontario Product Development Plan & Research
- 14** Sustainable Tourism – the Current Context & Research Findings
- 20** The Case for Sustainable Product Development & Management in Northern Ontario
- 21** Sustainability Product Development Plan for Northern Ontario
- 31** Terms of Reference – Sustainable Working Group



Prepared by Destination Northern Ontario – January 2026

¹ Destination Northern Ontario, Destination Master Plan, 2025

² Research Resolutions & Consulting, Overview of Tourism Opportunities for Northern Ontario (RTO13), July 2014.

Introduction

Destination Northern Ontario (DNO) is the largest of 13 Regional Tourism Organizations (RTOs) funded by the Ontario Ministry of Tourism, Culture, and Gaming. With a mandate to drive growth through destination development, DNO focuses on key initiatives in tourism product development, investment attraction, workforce development and industry training, marketing and collaborative partnerships within the industry.

Destination Northern Ontario is governed by a pan-Northern Ontario Board of Directors who are recognized industry leaders and who collectively provide vast knowledge, experience, and insight as they set the strategic directions for the organization. The organization maintains representation on the Board from the private sector at more than 50%.

The Board of Directors regularly consults with and is provided with guidance by an advisory group comprised of key government officials in tourism-related ministries and agencies. The advisory group is a key component to the Board of Directors' strategic planning and consultation process.



Vision & Mission

Destination Northern Ontario envisions Northern Ontario as a distinctive tourism destination offering high-quality experiences, fostering entrepreneurship, and connecting communities on local, regional, and global scales. Its mission is to provide leadership in strategically guiding and championing the region's tourism industry through communication, collaboration, and strong partnerships.

Core Values

Destination Northern Ontario's Board of Directors remains firmly committed to realizing the Vision in an innovative, result-based, effective, and fiscally responsible manner, grounded in strong governance and leadership. In addition to its historical values, the Board now places greater emphasis on environmental responsibility, accessibility, and inclusive practices.

✓ Accountability	✓ Leadership	✓ Collaboration	✓ Integrity
✓ Transparency	✓ Innovation	✓ Teamwork	

Goals for Northern Ontario Tourism Sector:

- Supporting innovation and entrepreneurship through research and education.
- Bringing a critical mass of high-quality tourism products and experiences to market.
- Ensuring sustainable tourism development and strong product-market alignment.
- Streamlining services for operators to improve industry efficiency.



Business Development & Operational Excellence Goals DNO's organizational objectives include:

- Conducting industry research to enhance product development and visitor experiences.
- Establishing organizational excellence through corporate services, improved communication, and enhanced financial systems.
- Strengthening the workforce through specialized training and strategic partnerships.
- Promoting industry leadership in product development, investment attraction, workforce training, marketing, and partnership initiatives.

Three Development Streams for Northern Ontario

01

› Defend & Maintain

Preserve and enhance existing tourism assets.

02

› Inspire & Grow

Develop new experiences to drive industry expansion.

03

› Rise & Shine

Elevate Northern Ontario's tourism offerings to be best-in-class.



Destination Northern Ontario Product Development Plan & Research

Destination Northern Ontario (DNO) has long prioritized research to shape strategic tourism development, aligning efforts to create meaningful visitor experiences that respond to evolving market dynamics.

A shift from traditional marketing to focused product development has been central to strengthening Northern Ontario's position as a robust and compelling tourism region. This approach continues to be informed by comprehensive research appealing to a wide range of traveller segments, now further enriched by the Destination Master Plan¹. With this evolution in its approach to tourism product development, it reallocates resources, refines its research methodologies, and sharpens its strategic priorities based on research from a post-pandemic lens.

Over the past decade, DNO has built a strong evidence base through market and segment research², including studies on North American motorcycle tourists, hunters, anglers, snowmobilers, high-yield nature/outdoor visitors, festivals and events, and attraction-motivated travellers in Northern Ontario. These studies consistently underscore that the outdoors is a core trip motivator, that targeted segments such as motorcycle touring and hunting are smaller but highly committed, and that distance, transportation corridors, and climate shape both the region's constraints and its competitive advantage.

Earlier work also highlighted reliance on roofed accommodation among U.S. visitors, the role of festivals and attractions as "one of many" trip activities, and the importance of aligning product development with realistic market size and access conditions.

In response to this research, DNO's 2014 Product Development strategy recommended a more deliberate product first approach and led to the creation of sector-based product development committees for angling, auto and RV touring, cycling, gateways and community destinations, Group of Seven, nature and adventure, and snowmobiling, later expanded to include boating, Francophone, 2SLGBTQ+, motorcycle touring, and now accessibility and sustainability. These committees have helped advance the sector-specific plans, identify product gaps, and inform investments that enhance the quality and readiness of Northern Ontario's tourism experiences. The Destination Master Plan¹ now builds on this foundation, shifting from primarily sector-based work to a more integrated, region-wide model that connects product development, infrastructure, research, and stewardship under a common vision.

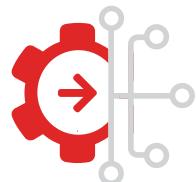
STRATEGIC GOALS FOR ADVANCING THE SECTOR

The Master Plan details four interconnected strategic goals¹:



Develop Integrated Experiences in All Seasons

Investments in Indigenous and outdoor experiences, luxury accommodations, and all-season programming are prioritized to counteract pronounced seasonality and drive visitation year-round. Regional accommodation tax models will be explored to establish a sustainable fund for ongoing development.



Foster Regional Collaboration & Industry Evolution

There is a focus on unified visitor journeys through coordinated marketing, training, and product development, with an emphasis on inclusivity, digital readiness, and service quality. Diversity and technology training, alongside workforce recruitment and retention programs, are key action areas.



Advocate for Strategic Infrastructure & Connectivity Solutions

Strategic infrastructure enhancements for improved roadways, airports, and rail lines to digital connectivity and wayfinding systems are vital for overcoming geographic barriers and ensuring visitor satisfaction and economic impact.



Champion Authentic Northern Identity & Environmental Stewardship

Embracing Northern Ontario's natural and cultural assets includes supporting Indigenous-owned experiences, sustainable event practices, and comprehensive accessibility improvements. Investments in walkability, cycling trails, and EV infrastructure underscore a commitment to sustainable travel and responsible growth.

Product Development & Research Evolution

Building on pre-pandemic research and sector-specific committees (e.g. angling, snowmobiling, Indigenous events, 2SLGBTQI+, nature and adventure, sustainability, accessibility), the Master Plan has moved towards an integrated, data-driven approach¹. DNO's priorities focus less on traditional marketing and more on product development that enriches visitor experiences and responds to new travel motivations emerging from the pandemic reset.

Key findings underscore:

- **The outdoors and Indigenous** experiences remain core tourism draws.
- **Visitors**, both **local** and **international**, seek high-quality and sustainable lodging solutions.
- **Focused sectors** (motorcycle touring, hunting) exist alongside broader appeal markets (festivals, attractions).
- **Physical distance, infrastructure gaps**, and **climate** define both challenges and opportunities for market growth.
- **A collaborative, regionally coordinated approach** offers compelling multi-destination itineraries and extends visitor stays, broadening economic benefits



Current Opportunities & Challenges

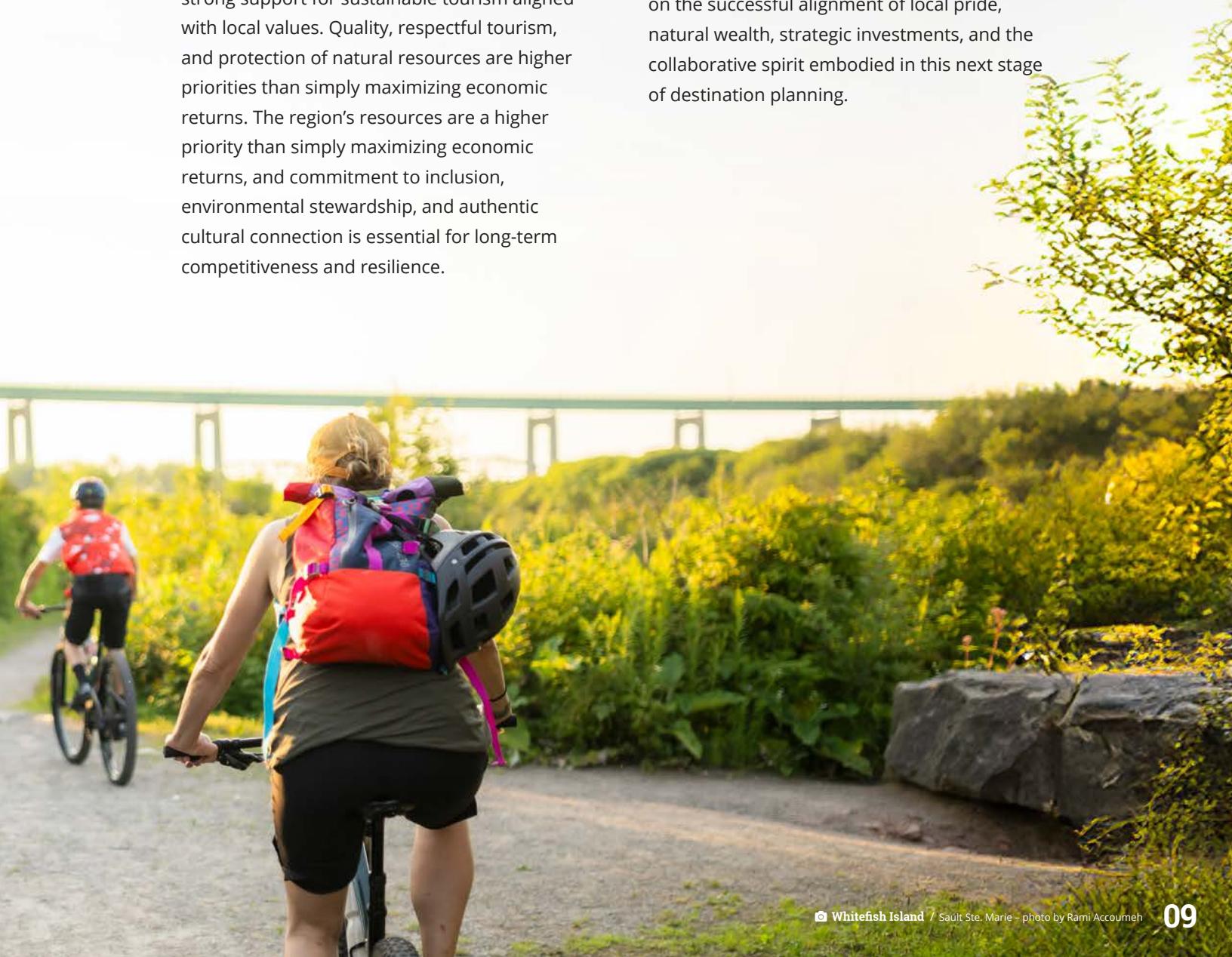
The pandemic catalyzed a “Great Reset,” pushing the industry to rethink delivery, sustainability, accessibility, and conservation. Northern Ontario’s vast, pristine environments and community pride continue to create authentic hospitality and distinctive visitor experiences. However, access barriers, aging accommodation stock, workforce shortages, and digital infrastructure gaps persist as critical issues requiring collaborative solutions.

Stakeholder and resident engagement indicates strong support for sustainable tourism aligned with local values. Quality, respectful tourism, and protection of natural resources are higher priorities than simply maximizing economic returns. The region’s resources are a higher priority than simply maximizing economic returns, and commitment to inclusion, environmental stewardship, and authentic cultural connection is essential for long-term competitiveness and resilience.

Forward Momentum: Implementation and Oversight

The master plan sets a continuous improvement cycle¹, with DNO steering implementation supported by a dedicated committee and clear public reporting to highlight progress and maintain accountability. Funding strategies, potentially including new taxes and private-public partnerships, will be critical to realizing the vision and goals.

Northern Ontario’s future as a sought-after, sustainable, and inclusive destination relies on the successful alignment of local pride, natural wealth, strategic investments, and the collaborative spirit embodied in this next stage of destination planning.



2SLGBTQI+ Inclusion, Accessibility and Sustainability

Tourism is a crucial source of income for many equity-deserving groups, including young people, women, Indigenous communities, racialized Canadians, those with disabilities, rural residents, and 2SLGBTQI+ people. To better support these residents and serve the communities they represent, it is essential to support growth through sustainability, accessibility, and inclusive leadership.

Canada's 2SLGBTQI+ Chamber of Commerce (CQCC), in its 2SLGBTQI+ Travel Market Guide & Tourism Development Toolkit³, identifies additional motivators for 2SLGBTQI+ travel such as bucket-list destinations, a strong reputation for diversity, having friends and family at the destination, proximity to home, and access to 2SLGBTQI+ culture and history. These factors highlight the importance of welcoming, inclusive destinations that are visibly safe and affirming.³

Survey data shows that disability and 2SLGBTQI+ identities intersect in significant ways. In a federal 2SLGBTQI+ Action Plan survey, 27% of respondents who identified as 2SLGBTQI+ also identified as a person living with a disability, including mental, physical, learning, sensory, cognitive, communication, and intellectual disabilities⁴. Nationally, there were nearly 700,000 2SLGBTQ+ persons with disabilities aged 15 and over in 2022, representing 8.7% of all people with disabilities and 2.3% of the Canadian population in this age group⁵.

U.S. research compiled by the Movement Advancement Project, drawing on large population-based surveys, similarly estimates that roughly one in four 2SLGBTQI+ adults has a disability, and that about 26% of gay men, 40% of bisexual men, 36% of lesbian women, and 36% of bisexual women report a disability^{6,7}. Together, this data emphasizes the importance of recognizing disability as part of diversity within 2SLGBTQI+ communities.



³ Canadian 2SLGBTQI+ Chamber of Commerce (CQCC)'s "2SLGBTQI+ Travel Market Guide & Tourism Development Toolkit

⁴ Women and Gender Equality Canada. 2SLGBTQI+ Communities Living with a Disability (Free to Be Me - Federal 2SLGBTQI+ Action Plan: Survey Findings

⁵ Statistics Canada. Ferlatte O, Tarasuk J. A profile of 2SLGBTQI+ persons with disabilities, 2022. Catalogue no. 89-654-X Released 8 July 2024.

⁶ Movement Advancement Project. LGBT People with Disabilities. Boulder, CO: MAP. Fact sheet (citing Washington State Behavioral Risk Factor Surveillance System and other population-based surveys).

⁷ Study Affirms LGBTQ People are More Likely to Have a Disability than the General Population. AmeriDisability. Summary of MAP findings, 2022.

⁸ Human Rights Campaign Foundation. LGBTQ+ Adults and Disability in the United States. Washington, DC: HRC; 2022. (Reports that 36% of LGBTQ+ adults self-report a disability compared with 24% of non-LGBTQ adults.)

Research from the Human Rights Campaign⁸ shows that 2SLGBTQI+ people report disabilities at higher rates than their non-2SLGBTQI+ peers, highlighting how overlapping identities can increase exposure to discrimination and bias in daily life. For the tourism industry, inclusivity, accessibility, and respect for diverse identities are core pillars of sustainable tourism development and must be integrated from the outset rather than treated as optional or separate. This overlap of identities often increases exposure to discrimination and bias in daily life. As a result, accessibility and inclusion efforts must be designed with these intersecting barriers in mind rather than treating disability and sexual or gender diversity as separate issues.⁷

Living with a disability does not define which attractions most travellers will want to see or events and activities in which they want to participate. Most accessibility-conscious travellers will simply want to explore the area and take in the sights and activities in a safe, barrier-free manner. As such, there are implications for all the DNO product pillars with respect to these lucrative travellers who are seeking sustainable, inclusive, and barrier-free destinations.

As Northern Ontario boasts a world-class destination for outdoor activities and natural landscapes, preserving sustainable products has a dual impact. It not only shields the products (our natural environment) but also secures the destination for all its inhabitants for the long term.



United Nations Sustainable Development Goals (SDGs) – Tourism Sustainability Context

No Poverty

End poverty in all its forms everywhere.

Tourism can provide jobs, stimulate local economies, and create livelihood opportunities for vulnerable groups.

Zero Hunger

End hunger, achieve food security and improved nutrition, and promote sustainable agriculture.

Sustainable tourism supports local food systems, farm-to-table initiatives, and agri-tourism.

Good Health and Well-being

Ensure healthy lives and promote well-being for all at all ages.

Tourism can promote wellness travel, outdoor activities, and mental health benefits while supporting health infrastructure through revenue.

Quality Education

Ensure inclusive and equitable quality education and promote lifelong learning opportunities for all.

Tourism revenue can fund education, while training and skills development in tourism boost employability.

Gender Equality

Achieve gender equality and empower all women and girls.

Tourism offers opportunities for women entrepreneurs and equitable workforce participation.

Clean Water and Sanitation

Ensure availability and sustainable management of water and sanitation for all.

Tourism providers can drive water efficiency practices and support local water infrastructure.

Affordable and Clean Energy

Ensure access to affordable, reliable, sustainable, and modern energy for all. *Adoption of renewable energy in tourism facilities reduces environmental impact.*

Decent Work and Economic Growth

Promote sustained, inclusive, and sustainable economic growth, full and productive employment, and decent work for all.

Target 8.9: By 2030, devise and implement policies to promote sustainable tourism that creates jobs and promotes local culture and products.

Industry, Innovation and Infrastructure

Build resilient infrastructure, promote inclusive and sustainable industrialization, and foster innovation. *Tourism drives infrastructure improvement in transportation, communication, and visitor services.*

Reduced Inequalities

Reduce inequality within and among countries.

Tourism can foster opportunities in remote and disadvantaged areas, bridging economic gaps.

Sustainable Cities and Communities

Make cities and human settlements inclusive, safe, resilient, and sustainable. *Tourism can fund heritage preservation, promote responsible urban planning, and strengthen local culture.*

Responsible Consumption and Production

Ensure sustainable consumption and production patterns.

Target 12.b: Develop and implement tools to monitor sustainable development impacts for sustainable tourism that creates jobs and promotes local culture and products.

Climate Action

Take urgent action to combat climate change and its impacts.

Tourism operators can reduce carbon footprints through energy efficiency, green transport, and offset programs.

Life Below Water

Conserve and sustainably use the oceans, seas, and marine resources for sustainable development.

Target 14.7: Increase economic benefits to coastal and island areas from sustainable marine and tourism activities.

Life on Land

Protect, restore, and promote sustainable use of terrestrial ecosystems, sustainably manage forests, combat desertification, halt and reverse land degradation, and halt biodiversity loss. *Wildlife tourism and eco-tourism can finance conservation and support biodiversity.*

Peace, Justice and Strong Institutions

Promote peaceful and inclusive societies for sustainable development, provide access to justice for all, and build effective, accountable, and inclusive institutions.

Tourism can foster cross-cultural understanding and fund community governance projects.

Partnerships for the Goals

Strengthen the means of implementation and revitalize the Global Partnership for Sustainable Development.

Tourism development depends on partnerships among governments, communities, NGOs, and the private sector.

<https://www.unwto.org/>

We are at a unique stage in our history. Never before have we had such an awareness of what we are doing to the planet, and never before have we had the power to do something about that.

— Sir David Attenborough

Since time immemorial, Indigenous Peoples have cared for and stewarded this land we now call Canada. With considerations given to the impact of seven future generations, these deep-rooted sustainable practices are at the heart of Indigenous tourism experiences today, where every visit supports environmental conservation and cultural preservation.”

— Destination Indigenous (Stewards of the Land)

Sustainable Tourism – the Current Context & Research Findings

Defining Sustainable Tourism

The UN Environment Program (UNEP) and the UN World Tourism Organization (UNWTO) define sustainable tourism as “tourism that takes full account of its current and future economic, social and environmental impacts, addressing the needs of visitors, the industry, the environment, and host communities.”

Additionally, sustainable tourism “refers to the environmental, economic, and socio-cultural aspects of tourism development and a suitable balance must be established between these three dimensions to guarantee its long-term sustainability.” (UNEP & UNWTO 2005)

The World Tourism Organization suggests that sustainable tourism should:

- 01** Make optimal use of environmental resources that constitute a key element in tourism development, maintaining essential ecological processes and helping to conserve natural heritage and biodiversity.
- 02** Respect the socio-cultural authenticity of host communities, conserve their built and living cultural heritage and traditional values, and contribute to intercultural understanding and tolerance.
- 03** Ensure viable, long-term economic operations, providing socio-economic benefits to all stakeholders that are fairly distributed, including stable employment and income-earning opportunities and social services to host communities and contributing to poverty alleviation.

Sustainable tourism development requires the informed participation of all relevant stakeholders, as well as strong political leadership, to ensure broad participation and consensus-building. Achieving sustainable tourism is a continuous process requiring constant monitoring of impacts and introducing the necessary preventive and/or corrective measures whenever necessary.

Sustainable tourism should also maintain a high level of tourist satisfaction and ensure a meaningful experience for the tourists, raising their awareness about sustainability issues and promoting sustainable tourism practices amongst them.⁸

⁸ UNEP & UNWTO. (2005). *Making tourism more sustainable – A guide for policy makers*. Madrid: UNWTO.

CASE STUDY #1

Norway

Since 2015, the tourism industry of Norway has had broad effects on society. It impacts cultural development, the natural environment it is a part of, and the local and national economy. Innovation Norway Tourism's mission is to keep the negative impacts of the tourism sector at a minimum and assist destinations and tourism enterprises with sustainable development.

Innovation Norway Tourism, amongst others, coordinates the tourism industry's efforts towards sustainable development at a national level. It is essential to gather the tourism industry and facilitate consistent and systematic efforts towards an increased focus on sustainable development.

Sustainable development within the context of tourism considers social, environmental and economic aspects. On Innovation Norway Tourism's website, the 10 principles of Sustainable Tourism are:

- ➔ cultural wealth
- ➔ the physical and visual integrity of the landscape
- ➔ biological diversity
- ➔ clean environment and resource efficiency
- ➔ local quality of life and social values
- ➔ local control and commitment
- ➔ job quality for tourism employees
- ➔ guest satisfaction and security
- ➔ economic sustainability and competitive tourist destinations
- ➔ economic sustainability and competitive tourism business

CASE STUDY #2

Science North, Sudbury

Science North's first Green Team was established over 20 years ago and has spearheaded countless green initiatives. The Green Team has members representing units across the organization, including operations in Sudbury, Sault Ste. Marie and Thunder Bay.

Science North is accountable through its Annual Report and Business Plan, which highlight environmental sustainability achievements and include a Net-Zero annual report that outlines the achievement of targets and practical plans to transition their facilities and operations to net-zero greenhouse gas emissions by 2050. To learn more about Science North's green initiatives, please visit their website | www.sciencenorth.ca.



CASE STUDY #3

Thompson Okanagan BC

Sustainability is an underlying principle of the Thompson Okanagan Tourism Association (TOTAL). TOTAL is committed to facilitating business and community growth that is environmentally, culturally, and economically sustainable in alignment with the United Nations 17 Sustainable Development Goals (UN 17 SDG).

As a signatory of the Glasgow Declaration, TOTAL supports halving emissions over the next decade and achieving net-zero emissions before 2050. TOTAL is motivated to take action from both directly experiencing the impacts of climate change and understanding the co-benefits of social, economic and environmental activities designed to address climate change. TOTAL will lead by example by continuously sharing knowledge, raising awareness and driving collaborative action on sustainability in their region. | [Sustainability — Thompson Okanagan Tourism Association \(TOTAL\) \(totabc.org\)](https://totabc.org)

ADDITIONAL INSPIRATION

CANADIAN EXAMPLES

- **Victoria, BC and Quebec City, Q.C.**, are two of the greenest cities in Canada.
- **Radical Gardens in Timmins** has maintained its eco-LEAF certification and has been recognized on "Canada's Greenest Restaurant List 2020." It has received numerous sustainability awards and is committed to farm-to-table dining.
- **Anishinaabe Wild Rice Experience** near Thunder Bay is a cultural tourism operation and a family-owned rice camp. Guests participate in land-based learning, discovering how to harvest and prepare wild rice.

Many case studies from communities and businesses have effectively attracted and served the sustainability market in Canada alone.

Current Context

The tourism industry has experienced remarkable growth and recovery in recent years. By the end of 2023, approximately 1.3 billion international tourist arrivals were recorded⁹ worldwide, representing a 33.4% growth compared to 2022 and nearly reaching pre-pandemic levels. This demonstrates the resilience and continued importance of tourism as a global economic force.

While tourism remains fundamentally connected to natural areas and continues to pose environmental challenges, the industry has made notable progress in reducing its environmental footprint. According to the World Travel & Tourism Council's latest Environmental & Social Research¹⁰, tourism accounted for 6.5% of all global emissions in 2023, a measurable decrease from 7.8% in 2019. Despite this improvement, the environmental impact of tourism remains significant and requires ongoing attention.

The relationship between tourism and environmental conservation remains complex. With the increasing global population, tourism growth contributes to waste generation, energy consumption, and crowding in popular destinations. However, sustainable tourism practices offer pathways to mitigate these impacts while preserving the natural and cultural resources that the industry depends on.

The environmental impacts of tourism continue to be a critical concern. The 8% contribution to global greenhouse gas emissions identified in 2018 continues to be cited as a baseline measurement.

The transportation sector remains the main contributor to tourism's emissions, accounting for 5% of all human-generated emissions, according to recent UN Tourism data¹¹.

Consumer behaviour and preferences continue to evolve in favour of sustainability¹². In 2023, 83% of global travellers reported that travelling sustainably is important to them, while 79% expressed willingness to pay up to 10% premium for eco-travel options with sustainable features. Affordability remains a challenge, with nearly half (49%) of travellers believing sustainable travel options are too expensive.

Sustainable accommodation choices continue to gain traction. Recent data¹³ shows that 41% of travellers who selected sustainable accommodations did so specifically to reduce their environmental impact. Additionally, 70% of global travellers reported being more likely to choose sustainable accommodations regardless of whether they were explicitly seeking one, and 57% would feel better staying in accommodations with sustainability certification.

⁹ UNWTO. (2024). *World tourism barometer*. Madrid: UNWTO.

¹⁰ World Travel & Tourism Council (WTTC). (2023). *Environmental & Social Research: Travel & Tourism global data*

¹¹ Malik, A., Lenzen, M., McAlister, S., & Geschke, A. (2018). "The carbon footprint of global tourism," *Nature Climate Change*, 8, 522–528. [See also: Dunne, D. (2018, May 7). "Tourism responsible for 8% of global greenhouse gas emissions, study finds." *Carbon Brief*, BBC News

¹² Booking.com. (2023). *Sustainable travel report*. Amsterdam: Booking Holdings Inc.

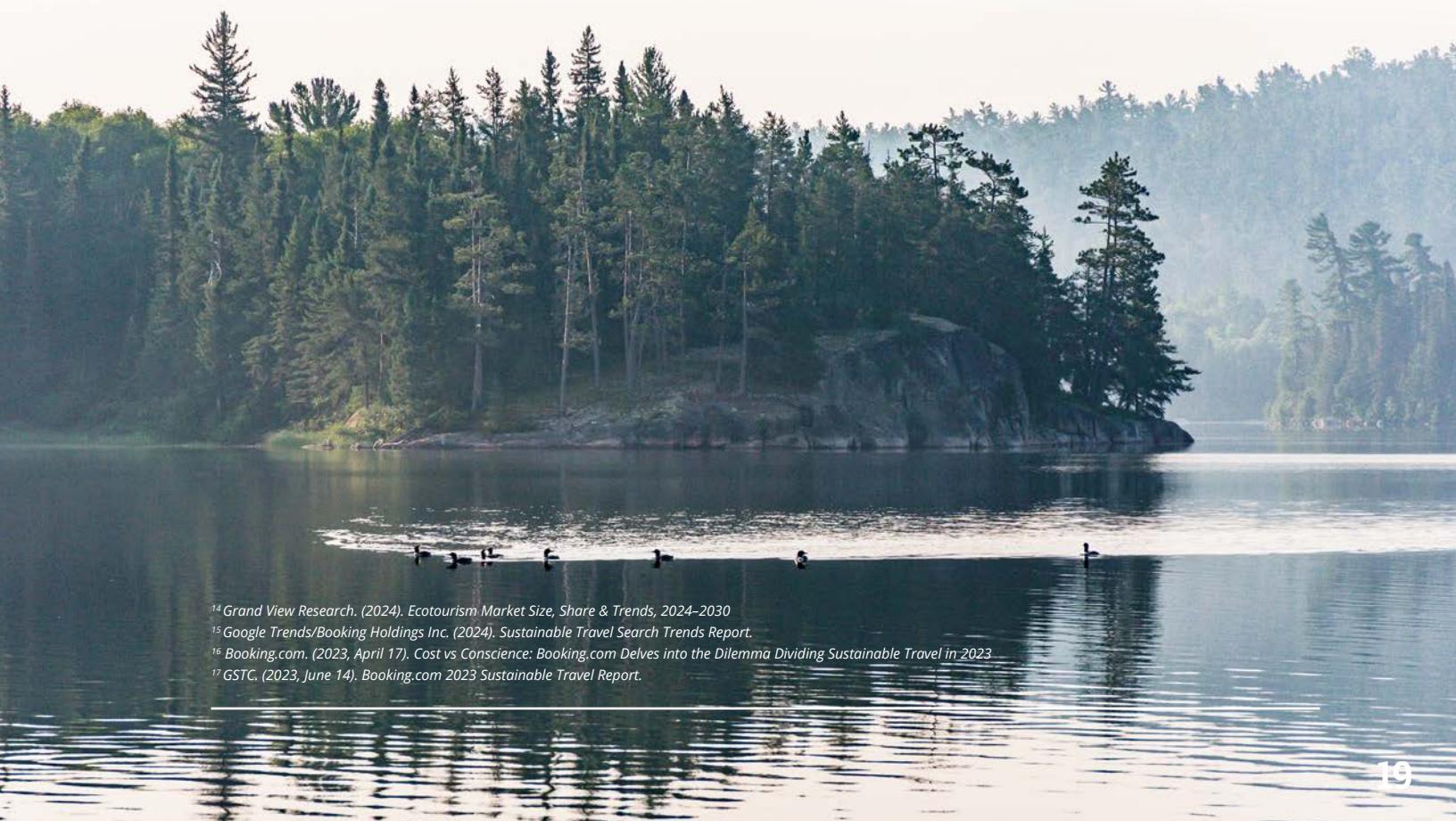
¹³ Booking.com's *Sustainable Travel Reports* (2022)

The market for sustainable tourism has experienced significant growth. According to Grand View Research¹⁴, the global ecotourism market was valued at approximately USD 235.54 billion in 2023 and is projected to reach about USD 665.20 billion by 2030, implying a compound annual growth rate of around 16%.

Consumer interest in sustainable travel has remained strong in recent years. Industry surveys show that more than four in five travellers now say that travelling more sustainably is important to them, indicating that sustainability has become an established expectation rather than a passing trend. Analyses of Google search data¹⁵ also report double-digit growth in searches for terms such as “sustainable travel” between 2019 and 2024, which supports the view that interest has stabilized at a higher level after an initial surge.

Travellers increasingly adopt sustainable practices during their journeys. In 2023, 67% reported¹⁶ turning off air conditioning when not present in accommodations (a 29% increase from 2022), while 60%¹⁷ reused towels multiple times (a 25% increase from 2022). This behavioural shift demonstrates growing awareness and commitment to environmental responsibility while travelling.

A key challenge emerging in 2023-2024 is the tension between sustainability desires and economic considerations. Booking.com’s Sustainable Travel data shows that 76% of travellers express a desire to travel more sustainably, the same percentage acknowledge that the global energy crisis and rising cost of living impact their spending plans. This “cost versus conscience” dilemma represents an essential consideration for tourism providers developing sustainable offerings.



¹⁴ Grand View Research. (2024). *Ecotourism Market Size, Share & Trends, 2024–2030*

¹⁵ Google Trends/Booking Holdings Inc. (2024). *Sustainable Travel Search Trends Report*.

¹⁶ Booking.com. (2023, April 17). *Cost vs Conscience: Booking.com Delves into the Dilemma Dividing Sustainable Travel in 2023*

¹⁷ GSTC. (2023, June 14). *Booking.com 2023 Sustainable Travel Report*.

The Case for Sustainable Product Development & Management in Northern Ontario

There is an increasing appetite for sustainable tourism. The numbers show that tourist interest over the years has been steadily increasing, and now online search engines are providing statistics to prove just how much interest tourists have in sustainable tourism.

Sustainable travellers represent a major opportunity in the recovery of the Canadian tourism industry post-pandemic, while leaving a positive impact on the people and the beautiful landscape that Northern Ontario has to offer. In 2022, 81% of global travellers¹⁸ confirmed that sustainable travel was important to them, with 50% stating that recent news about climate change had influenced their decision to make more sustainable choices when travelling.

With sustainable travellers seeking to avoid busy and overcrowded destinations, many are turning to Northern Ontario for its unique travel experiences. However, they value two things significantly higher than their mainstream counterparts: respect and honesty, which may bode well for Northern Ontario.

Northern Ontario is uniquely positioned to attract the growing segment of sustainable travellers. With its emphasis on low density experiences, authentic engagement, and natural beauty, the region offers what conscientious travellers increasingly seek.

This potential aligns with broader international tourism trends:

- In 2014, international tourism continued to propel communities forward, despite the many challenges they faced. At the years close, the number of tourists travelling internationally grew by 4.4%, reaching a new milestone of 1,135 million and capping a five-year consecutive increase since the global economic crisis of 2009¹⁹
- In 2015, nature-based tourism accounted for about 20% of total international travel and continued to grow, according to the UNWTO²⁰
- According to a 2019 Booking.com report, 70% of global travellers affirm that they would be more likely to book an accommodation knowing it was eco-friendly²¹
- Research on sustainability-oriented visitors (e.g., 'geotravellers') suggests they tend to stay longer and spend more in destinations than other visitors²²
- Canada ranks among the leading adventure tourism destinations globally, with provinces such as British Columbia, Ontario and Quebec offering strong adventure potential
- Analysts describe Canada's responsible/sustainable tourism segment as growing but still under-developed relative to its potential, while destinations such as New Zealand, Iceland, Norway and Portugal have moved faster to position themselves as sustainability leaders

¹⁸ Booking.com. (2022, April 14). Climate, Community and Choice: Booking.com Reveals the Trends Shaping Sustainable Travel in 2022. [Press release & report findings]

¹⁹ UNWTO (2014) International tourism growth (<http://www.unwto.org/archive/global/press-release/2014-12-18/international-tourism-track-end-2014-record-numbers>)[1]

²⁰ UNWTO World Tourism Barometer, growth rates 2014 (<https://www.unwto.org/archive/global/press-release/2014-09-15/international-tourism-5-first-half-year>)[5]

²⁰ UN press release—World tourism tops 1.1 billion in 2015 (<https://news.un.org/en/story/2015/01/489462>)[2]

²¹ GSTC summary: Booking.com 2019 Sustainable Travel Report (<https://www.gstc.org/booking-com-sustainable-travel-report-2019>)[9]

²² Dolnicar, S., & Long, P. A. (2016). Are sustainable tourists a higher spending market? *Tourism Economics*, 22(1), 1-18.

Sustainability Product Development Plan for Northern Ontario

The World Tourism Organization (UNWTO) has defined five key areas for successful sustainability tourism strategies for destinations to consider when pursuing market-readiness and for the potential to help transform our world into a place of prosperity and wellbeing for all:

- Inclusive and sustainable economic growth
- Social inclusiveness, employment, and poverty reduction
- Resource efficiency, environmental protection and climate change
- Cultural values, diversity, and heritage
- Mutual understanding, peace, and security

Work Plan

The following work plan has been developed considering these categories as well as from the input received from the Northern Ontario Sustainability Product Development Strategy Working Group. Several steps are required to further develop sustainable tourism in Northern Ontario.

FIVE-YEAR PLAN

Year One	Year Two	Year Three	Year Four	Year Five
<ul style="list-style-type: none"> → Apply for Organizational Certification through GreenStep → Education and awareness through sessions at the Northern Ontario Tourism Summit → Creation of a database of tourism businesses already engaged in sustainable practices, and those wanting to get involved. → Develop a Sustainable Tourism Committee to direct how Sustainable Tourism should operate in Northern Ontario. → Partnership with GQCC and CTA 	<ul style="list-style-type: none"> → Continued awareness and session at the Northern Ontario Tourism Summit → Integrate sustainability content into Tourism Excellence North training, adding or deepening sustainability components where needed to complement the program's existing strengths and respond to emerging industry needs. → Continued Partnership with the GQCC and CTA → Partner with TIAO to develop a podcast session devoted to Sustainability 	<ul style="list-style-type: none"> → Apply for Destination Certification for Northern Ontario through GreenStep → Continued Partnership with the GQCC and CTA → Continued awareness through Northern Ontario Tourism Summit and Tourism Excellence North Programming 	<ul style="list-style-type: none"> → Re apply for Organizational Certification → Partner with, Communities and Operators for GreenStep training 	<ul style="list-style-type: none"> → Continuation of workshops and sessions at Northern Ontario Tourism Summit → Adaption of strategy



STEP 1: Apply & Enhance Research

Building on the Destination Master Plan's extensive engagement and analysis, Northern Ontario now has a strong evidence base on its visitor economy, including key strengths, barriers, and opportunities for sustainable growth. This work has clarified how travellers perceive the region, which products and experiences are most compelling, and where gaps in infrastructure, seasonality and accessibility limit competitiveness. The next priority is to deepen this understanding for sustainability-focused segments by refining estimates of market size and spend, assessing the readiness and quality of sustainability-aligned products, and benchmarking Northern Ontario's competitive position against leading destinations, using targeted follow-up research where needed rather than broad baseline surveys.



STEP 2: Best-in-Class Criteria

From the research and industry knowledge of the product team, a set of best-in-class criteria should be developed for Northern Ontario operators who play critical roles in the sustainable tourism experience. Sustainability training will be incorporated into Tourism Excellence North (TEN) training programs in collaboration with GreenStep.





STEP 3: **Asset Inventory & Market-Readiness Assessment**

It is recommended that the next step in the work plan for sustainable tourism in Northern Ontario is to complete an inventory of all the existing assets in Northern Ontario that will appeal to this market. This inventory will create an understanding of the product that exists in the region and allow for a more coordinated effort for regional development.

Once the inventory has been completed, a market-readiness assessment of key Northern Ontario sustainable assets and opportunities will allow Destination Northern Ontario and the Sustainability Product Development Strategy Working Group to choose best bet assets to focus efforts on.



STEP 4: **Address Future Training Opportunities, Including Promotion of Training Programs**

To make the Northern Ontario experience inviting for the sustainability market, tourism assets that support the focus being pursued should be high quality, market-ready establishments, experiences and events. Encouraging operators to take the necessary training, in partnership with others such as GreenStep and its existing training programs, the Tourism Excellence North self-assessment tools, Fast Track to Success and/or group learning training solutions will help to ensure operators are focused on the quality of their establishment and providing the best possible experience to travellers.

To communicate the benefits of the training tools for operators, a communications strategy has been developed. If businesses do not sign up for training as expected, work with partners to promote the training programs by leveraging the networks and trust of trade bodies to advertise through their events, channels, and newsletters.



STEP 5: Identify Product Development & Partnership Feasibility Strategy Opportunities

Implementing product enhancements to make the assets fully market-ready takes time and money. Starting with the best bet operators, gaps in market readiness should be addressed. Partnership feasibility strategy opportunities will also be available to assist in the current market situation and capabilities for new product development. Often during this stage, partners are eager to jump into marketing. Ensuring the changes are implemented before marketing will ensure market readiness.

Some examples of products and experiences that can be developed for Northern Ontario:

- Enhance products to be all-seasons where possible.
- Support the development of Indigenous tourism experiences.
- Expand culinary food offerings through the Culinary Tourism Alliance.
- Develop themed hiking, camping, and glamping experiences.
- Create walking tours focused on murals, haunted history, and local cuisine.
- Organize tree planting and restoration trips for visitors.
- Facilitate fishing and sailing trips with local hosts.
- Support festivals and events that highlight local cultures and heritage.
- Increase rural/agritourism experiences such as farmers' markets and agricultural fairs.
- Combine experiences for unique multi-day itineraries (e.g., hike + foraging, culinary tour + market).
- Expand and adapt tourism products to be more accessible.
- Provide stewardship and sustainability education within all offerings.



Remember that safety, comfort and authenticity are major concerns for eco-travellers when choosing their destination.



STEP 6: **Leverage Partnerships & Advocate for Investment Opportunities**

To improve and grow sustainable tourism in Northern Ontario, Destination Northern Ontario and its partners will work with established organizations to advance conservation and restoration efforts in the North, while advocating for expanded electric vehicle (EV) charging infrastructure along key tourism corridors and in communities. These combined investments in nature and lowcarbon mobility will help reduce emissions, support EV and other sustainable travel options, and enhance visitor confidence and connectivity across the region.





STEP 7: Marketing & Communications

Once product development is complete, the experiences can be marketed. Authentic collateral, such as photography, will be needed. A Northern Ontario sustainability marketing plan should outline tactics to be used to push the appropriate focused experiences to these consumers. Care should be given to ensure that the tactics align with and leverage the provincial sustainability tourism marketing efforts.

The Northern Portal (northernontario.travel), social media and media relations can play a large supportive role with future marketing efforts, as well as media FAMS and influencer programs.

Once a sustainable product is created and the tourism partners understand the principles and structure of sustainability, DNO can look forward to incorporating sustainability into all aspects of the tourism industry.



[VISIT THE PORTAL >](http://northernontario.travel)





SWOTT Analysis

Strengths

- Growing support from industry leaders committed to growing the diversity of residents and visitors
- Accessibility to Lake Superior and extensive hiking and camping opportunities
- Substantial outdoor product that includes world-class boating, fishing, hunting, motorsports, snowmobiling and cycling
- Commitment to ongoing diversity training
- Unique and accessible Northern culture and heritage experiences
- Group of Seven cultural market opportunities
- Unique food and drink and shopping experiences
- Air connections to major centres
- Sentiment: good reputation, diverse, safe, inclusive, acceptance
- Looking to travel outside of dense urban markets into vast areas
- Government grants for small and medium businesses to upgrade to become more energy efficient
- Northern Ontario is massive, beautiful and relatively unexplored – this is attractive to post-COVID travellers seeking outdoor adventures, few crowds, and open spaces that are accessible and sustainable
- Allows wildlife to continue to thrive in Northern Ontario by preserving ecosystems and biodiversity
- Northern Ontario already boasts established sustainable tourism opportunities

Weaknesses

- Scarcity of eco accommodations
- Some rural areas have a bad reputation
- Marketing products that are not ready
- Lack of sustainable development knowledge
- Skills gap in implementing measurable sustainability practices that meet evolving certification standards
- Absence of comprehensive sustainability metrics for the region's tourism sector
- Decrease in available flight schedules to major urban centres since the onset of the pandemic
- Large geographical land mass resulting in significant drive times between major urban centres and regions
- Lack of electric charging stations
- Expensive to upgrade to green infrastructure

Opportunities

Engagement and Alliances

- Partner with GreenStep to offer training through Tourism Excellence North and the Workforce Development and Industry Training pillar
- Build community networks
- Engage the broader community to collaborate on educational programs and diversity training to adapt to challenges posed by climate change
- Regional and cross-border alliances with sustainable organizations
- Partner with entrepreneurs, small businesses, and business centres
- Advocate for funding opportunities for tourism businesses to become accessible and sustainable
- Develop partnerships that help guide businesses through business planning and development as it relates to sustainability measures
- Encourage businesses to participate in TENS programs, including the Tourism Business Essentials course

Training

- GreenStep/TIAO Training and Accreditation
- Update TEN industry training content over time so sustainability elements reflect evolving industry standards and priorities.
- Develop a dedicated sustainability resource page on the Tourism Excellence North website.
- Continue training and education through the Northern Ontario Tourism Summit

Marketing and Messaging

- Canada in general, is viewed by the international market as being progressive and open
- Promote success stories of communities and rural areas moving towards sustainability
- Develop/promote a campaign to raise awareness on sustainable tourism, showcasing eco-friendly destinations in Northern Ontario
- Create transparent sustainability reporting that counters greenwashing concerns
- Leverage the 26% increase in online searches for sustainable travel through targeted digital marketing
- Digital health can optimize the use of resources, reduce greenhouse gas emissions, and make a more circular economy.
- Celebrate diversity through media relations, asset development, northernontario.travel etc.
- Improve understanding and awareness about sustainability and protecting natural resources for future generations

Product Development

- Eco-friendly lodges with sustainability protocol
- Education and resources were developed for tourism operators to aid in the development of sustainable tourism products and services
- Grow and encourage affiliations with sustainable tourism organizations such as TIAO, GreenStep, UNWTO, Sustaining Tourism, etc.
- Include Sustainability Tourism on the agenda for the Northern Ontario Tourism Summit
- Develop a campaign to raise awareness on sustainable tourism, showcasing eco-friendly destinations in Northern Ontario
- Develop assets representative of people with sustainable practices in tourism advertising
- Repackage, refresh and reintroduce products from past and develop new products for the domestic market in a renewable way



Threats

- Many travellers find that there is a lack of information available regarding the best sustainable tourism practices, and they are unsure of how to implement these practices into their own experiences
- Companies and businesses making misleading environmental claims to make a profit (greenwashing) have created negative associations with 'green brands'
- Worldwide disasters and emergencies – increased forest fire risks, war, climate change, and changing seasonal patterns.
- Transitioning to green energy is expensive
- Lack of dedication and commitment
- Lack of product training opportunities
- Lack of awareness and knowledge
- Increasing competition for the sustainability-conscious traveller

Trends

- Road trips (longer travels and driving as far away from the crowds/cities in Southern Ontario)
- Near-complete recovery of international tourism to pre-pandemic levels
- The growing importance of sustainability certifications in travel decision-making
- The increased adoption of sustainable behaviours by travellers
- Domestic front: people are looking to travel and are enthusiastic about discovering local experiences
- Remote work (longer-term stays)
- Diversity and inclusion focus for economic development and resident attraction strategies
- 80% of travellers/visitors in Ontario are from Ontario
- Huge increase in demand for outdoor activities (ie. Cycling, boating, kayaking, SUP Board, skiing, etc.)
- Greater focus on domestic, local (our own backyards) and Ontario travel
- More open minds
- Outmigration from larger centres to smaller communities
- Eco lodging and nature adventures

Terms of Reference

SUSTAINABILITY PRODUCT DEVELOPMENT STRATEGY
WORKING GROUP
WEDNESDAY, MARCH 23, 2025

Destination Northern Ontario's Mission Statement

Destination Northern Ontario - *Destination 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 within the industry.*

Purpose of the Sustainability Working Group

The purpose of the Sustainability Product Team is to provide advice to DNO through a process of discussion and analysis from the available research and the recommendations for Sustainable Tourism outlined in the Destination Northern Ontario Tourism Product Development Strategy. DNO will capitalize on members' knowledge of the sustainable community as a secondary tourism product in Northern Ontario and utilize the feedback and advice to action this product niche.

THE TEAM WILL FOCUS ON HOW TO:



Engage the local sustainable and broader community



Increase sustainable targeted tourism product development



Expand sustainable target marketing and partnerships



Implement a region wide sustainable tourism development strategy



Develop network activities that engage allies of the sustainable community

DNO's Key Performance Indicators (per year)

INITIATIVE	KPI METRIC	TRACKING SOURCE
Waste Diversion	% workplace waste diverted (recycling)	Waste audit, recycling logs
Paper Reduction	% reduction in paper usage per year	Adobe Survey # (usage stats) DocuSign (# of contacts)
EV Infrastructure Impact	# EV charging stations	Year over year change in number of EV charging stations
Energy Conservation (Lighting)	% staff participation in turning off the lights	Internal survey, lamp use
	Estimated hours overhead lights off per week	Self-reported, observation
Inclusion: Trip Planner Tags	# and % listings tagged 'working towards sustainability, Accessible, 2SLGBTQI+ friendly'	Trip planner analytics



Role of the Sustainable Product Team

The working group will collaborate and share their collective knowledge on how best to approach the enhancement and expansion of the sustainable tourism opportunity by exploring every possible means to attract more members of the renewable community, making them stay longer and spend more money in Northern Ontario.

Encourage activities that support sustainable tourism that is complimentary and coordinates well with other product niches in a sustainable, accessible, and resilient way.

Input will flow from the working group to the DNO staff in the form of information, feedback, and recommendations, which will be used to map the implementation of initiatives.

Additionally, the Sustainable Working Group

will be instrumental in advising Destination Northern Ontario staff on the best avenues for focused community engagement and communication of critical information.

The Working Group will assist in identifying and forecasting any training needs within workforce development and industry training.

Final decision-making authority rests with the DNO Board of Directors.

Skills and Attributes of the Sustainable Product Team

- ➔ In the interest of putting together the best possible team of individuals, identification, selection and appointment of team members will center on the following attributes:
- ➔ Extensive experience in the tourism industry and/or in the area of Sustainability.
- ➔ An above-average understanding of the tourism landscape of the region.
- ➔ A very good understanding of unique natural, cultural and heritage attractions that will make excellent experiential offerings to the region.
- ➔ Good knowledge of federal, provincial, and municipal policies and regulations that impact sustainability and tourism in general.
- ➔ Track record of being involved in innovative and sustainable tourism product development.

Duties of the Sustainable Product Team

- Meet as required, but no less than four times per year. The DNO Manager of Product Development will act as chair of this group. As the work develops, the DNO representative may change to reflect work within its five pillar areas.
- Members of the Sustainable Working Group will contribute to the meeting agendas.
- The Sustainable Working Group may be required to meet face-to-face. The majority of meetings will be held by videoconference.
- DNO staff will organize and coordinate meetings; team members are expected to provide prompt and timely responses to aid this process.

APPOINTMENT

Members of the team shall be accepted for a two-year period.

ACCOUNTABILITY

The Sustainable Product Team will be considered a focus group and report to the Executive Director of Destination Northern Ontario.

MEETINGS

Meetings will be held on an “as-needed” basis or as determined by the team and/or the Product Development Manager.

MEMBERSHIP

Members will be appointed based on interest in joining and knowledge of sustainable tourism development.

Let's Work Together!



Interested in Joining the Working Group?

Contact **Megan Boyd**, Manager, Product Development & Investment Attraction, Destination Northern Ontario:

m.boyd@destinationnorthernontario.ca



Connect with us!

WEBSITES

Destination Northern Ontario / destinationnorthernontario.ca

Tourism Excellence North / tourismexcellencenorth.ca

Domestic Marketing / northernonario.travel

International Travel Trade / northernonarioitt.com

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