Northern Ontario

Five-Year Tourism Marketing Strategy 2008-2012

Roadmap For Renewal
Tools For Success

This project was supported by: The Strategic Tourism Development and Marketing Partnership For Northern Ontario

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Submitted to and supported by:
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Beginning in 2004, the Strategic Tourism Development and Marketing Partnership for Northern Ontario, involving FedNor, the Ontario Tourism Marketing Partnership Corporation (OTMPC) and the Northern Ontario Heritage Fund Corporation (NOHFC), has led to opportunities for collaboration between different levels of government and tourism industry stakeholders and a progressive approach toward tourism development in Northern Ontario. The objectives of the Partnership are to provide strategic support for:

- *Northern Ontario tourism supplier education and capacity building;*
- *Northern Ontario product development; and*
- *Market-based promotional initiatives that build awareness of and increase visitation to Northern Ontario.*

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Welcome

This strategy is timely.

There has never been a better time to be brave, to be bold and to take risks for Northern Ontario to become more competitive as a tourist destination. Never has the tourism industry and its stakeholders been more of one mind about the need for a marketing change to drive the fortunes of the business in a more positive direction.

Over 500 stakeholders (a first) have been consulted on where the marketing strategy should go, what its content should be and how the players should structure for alignment and success. The industry has been clear with the Strategic Tourism Development and Marketing Partnership, hereafter referred to as the "Partnership," and its government sponsors that they are ready for action, direction and help. It is looking to governments for leadership, and to its own associations and organizations for smart and effective use of assets. Everyone is looking for a strategy for all of Northern Ontario.

Fortunately, this is an industry with ideas. The team that built this strategy can truly attest to their passion for solutions, their creativity. A few quotes:

Beautiful place to visit… clean, pristine, safe. Market Northwest differently – different experience, solitude. One brand, one printed piece. Fragmented money isn't clear thinking. Less hunting and fishing, more eco and adventure. Real winters. Need more of a business approach. Need to be truly consumer-focused. Incent individual businesses to do a better job of marketing. Align efforts better. Stop trying to be someone else. Sell what you do best. Stop marketing products, start marketing a destination. We are Ontario. Our product is the experience of remote. At the macro level, we need destination status. At the micro level, individual businesses need to set themselves apart and develop niche markets. Too much focus on drive markets. Focus, consistency, alignment. Separate the North from the South. Sudbury is a suburb of Toronto. Engine in the U.S. market needs to get turned on. Experience portfolios as brands. More educational components for the industry. Fishing is year 'round, not one season. How do we get across the idea – "Come and get in touch with yourself?" This too shall pass. I know my target, but how do I find them? Make it clear that we're selling Northern Ontario. We are remote, beauty, peace, rejuvenate, refresh. Don't be complicated. Mine the low-hanging fruit. Move tourism to the front burner. Too much guessing and by golly. Focus on the Internet. Be bold.

No shortage of ideas and insight here!

We're Funneling Down As We Go

Welcome to the new Northern Ontario Five-Year Tourism Marketing Strategy, a synthesis of research, industry input, insight and creativity. It is a roadmap to guide all players to alignment, business turnaround and smart tactical planning.

It is built on the principle of "funneling down" information and analysis, as we build the case for clarity of competitive positioning, "best bets" targeting, the mining of consumer insight, behaviour and media shift opportunities.

Let's Get Started

Now Is Our Time

The goal of the new strategy is to maximize the limited marketing resources available to Northern Ontario through the alignment of industry and government marketing ventures. Since the current Ontario Tourism Marketing Partnership Corporation (OTMPC) strategy has expired, the Strategic Tourism Development and Marketing Partnership recognized the need for a new strategy that addresses the significant shifts in the tourism marketing landscape in Northern Ontario.

The challenges faced by the industry include:

- **Global tourism marketing clutter,** primarily on the Internet – the battle for destination share of mind and share of wallet is being fought online
- **The increasing scarcity of marketing resources** to support sales efforts in what has become a fragmented and unpredictable tourism market – there is a real need to focus dollar and human effort allocation
- An over-arching **need to turn downward visitor traffic and yield trends around** – the business is either static or decreasing depending on what research you read and who you talk to
- Clearly the **same old thinking and tactics are not working** – Northern Ontario has to step up to the plate as a viable, competitive and intriguing destination or continue to lose share of tourism business

With this as a backdrop, the Partnership created a process to identify a "best bets" strategy, with a two-phased analysis, consultation and strategic development blueprint. Work began in February 2007 and the primary direction of this strategy was approved for implementation in February 2008.

Approaching The Challenge

To ensure that the best body of knowledge and the most up-to-date strategic thinking was leveraged for the Northern Ontario tourism strategy, the foundation document for a Five-Year Tourism Marketing Strategy for Northern Ontario was prepared in Phase I that examined the market situation, industry structure, product and consumer in depth.

As a result of that work, a series of "best bets" were identified and taken forward to consultations for the Northern Ontario tourism industry in April 2007. The final foundation document contains 35 recommendations for the new strategy. These recommendations are incorporated in the thinking that follows.

In addition to the foundation document, 16 industry stakeholders were interviewed in depth about their vision and goals for the new strategy. They ranged from operators to transportation executives to industry association personnel to government marketers. This critical learning paved the path for the development of the most important components of the strategy.

In addition to these interviews, new data from Environics Analytics (see Appendix 5) was made available, allowing the strategy team to examine the makeup of a specific Northern Ontario tourism target group with outdoor desires for the first time. This additional information allowed us to focus targeting even further than suggested by the foundation document.

Finally, a draft strategy was taken to seven consultation sessions across the North and was also presented in one webinar, exposing the thinking to over 250 stakeholders and industry partners. In total, over 500 stakeholders were consulted in the development of the strategy. Their positive reaction to the strategy, as well as their input to the final document, has been invaluable to its direction.

Moving Forward

The strategy that follows suggests that all levels of the industry and government be brave, be bold, and take risks to get ahead of the competition. To do this, all must focus on three areas:

- **A refreshed, competitive offer** for Northern Ontario, targeting the right people, in the right places with the right message.
- **A new way of working together that aligns** the efforts of all the players as opposed to duplicating them.
- **Support and guidance for the industry** in the form of tools that everyone can use to help align their efforts under the overarching strategy.

The five-year strategy is a "best bets" outlook. It does not replace the marketing efforts currently underway focusing on the avid and touring markets; rather, it guides these and presents a road map for quick successes for new business. These are easy-to-ramp-up initiatives, such as a toolkit and new portal that will show immediate industry alignment and sales lead benefits. This strategic approach will be measured at every stage of its implementation, so it can be adjusted during the five-year period – another key recommendation from Phase I.

What Are The Impacting Issues?

There is no question that critical change is needed to reverse the fortunes of the Northern Ontario tourism industry. A number of the key findings identified in Phase I of the strategic review and outlined in the foundation document are discussed below.

Canada's Ranking As A Destination

Tourism worldwide is strong, but not necessarily in Ontario and particularly not in Northern Ontario. According to the World Tourism Organization, Canada is no longer in the world's top 10 tourism destinations, having been supplanted by Russia, China, and Mexico. In 2007, Canada was twelfth in the world in overall tourism volume.

The strategy recommends an approach to take advantage of the international efforts Canada will be making to capture tourism attention. For Northern Ontario to get its fair share of the growth foreseen for Canada, a focus must be given to marketing experiences of our destination over the next five years. In addition, OTMPC will be promoting "Ontario, Yours to Discover" in all markets that this strategy marks as important for Northern Ontario.

Travel Forecasts

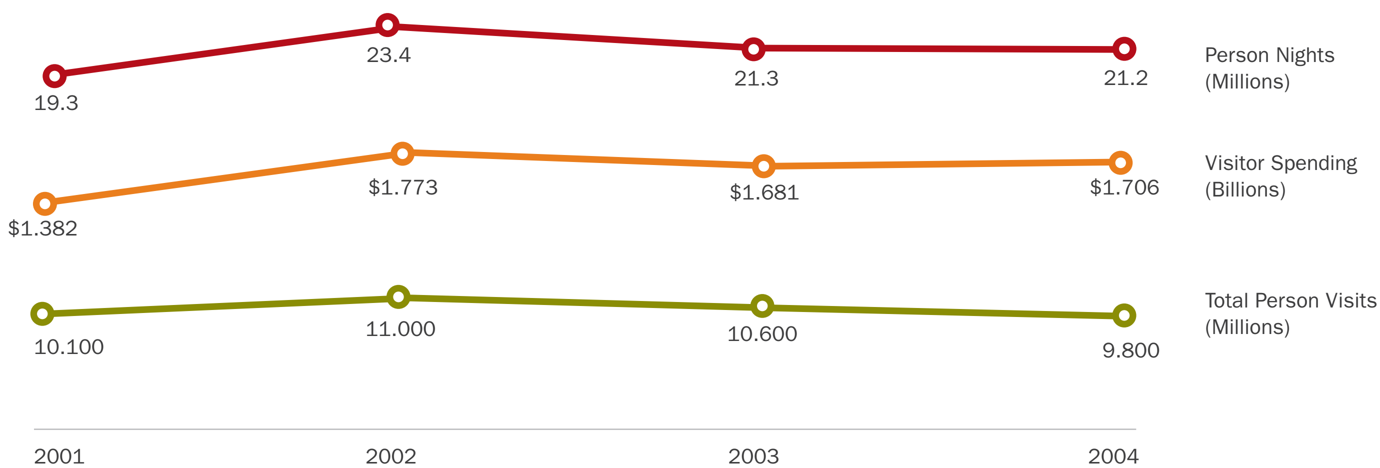
The outlook for tourism in Ontario in the past few years has not been robust. While the forecast for the next five years is stronger, the outlook remains lackluster. The number of total visits by Ontario travellers within Ontario is expected to grow by an average annual compound rate of 1.6%. Visitors from the U.S. to Canada from 2006 through 2011 are expected to decline by 1.7% per year on average with same day and leisure travel experiencing the largest declines. Travel from overseas origins is expected to be robust in the coming five years with an average annual growth of about 4.9% through 2011. The number of visitors from other provinces will be sluggish, shrinking at an annual average of 0.2% through 2011.

Northern Ontario Tourism Volume Is Declining

As the chart below indicates, Northern Ontario's business has been static for some time. Throughout the consultation process, anecdotal input suggested that volumes have declined since 2004, and that 2007 was a tough season for the North. Of the 21.2 million person nights in the last measured year of 2004, 9.8 million person visits were generated. This strategy addresses this primary market, as its yield is what drives industry success and health.

The most recent statistics available are the 2004 Canadian and International Travel Surveys. Other indicators, such as border crossings, etc., suggest that visitation and visitor spending have fallen below 2004 levels. Returning to pre-SARS levels is a realistic target given the current challenges facing tourism.

Total Volume, Spending and Nights in Northern Ontario (2001-2004)



Source: Canadian International Travel Surveys - Ontario Ministry of Tourism 2001-2004
Due to changes in the Canadian Travel Survey in 2005, no comparable data past 2004 was available.

Potential Visitors Have Choices

Sales volumes to Northern Ontario are static based on available research to 2004 and from anecdotal information gathered during the strategy process. Between 2003 and 2004, total person visits to Northern Ontario were down by 7%, including a 9% decrease in visits from the United States. We need to work hard in order to obtain U.S. business. Our own citizens are going elsewhere as well. Over 80% of Ontario's international outbound trips are to the U.S.; some of this could potentially feed the Northern Ontario tourism market. Travel from Ontario to the U.S. is projected to reach 22.4 million person visits by 2010.

Familiarity With Northern Ontario Is Low

Awareness of Northern Ontario is not high, not even in Southern Ontario, our own backyard. According to a study undertaken by TNS Canadian Facts, almost 60% of travellers from Quebec who have previously visited Ontario know little about Northern Ontario and only 4% are interested in taking a trip to the region in the next 12 months. Very similar numbers can be seen in the U.S.; 55% of travellers from the U.S. who have visited Ontario know little about Northern Ontario and only 8% are interested in a trip to the region in the next 12 months.

The Foundation Document – Key Insights

Between February and May 2007, Phase I of this project was undertaken to determine the "best bet" opportunities for the strategy. These initial findings were then shared with the industry in a series of consultations across Northern Ontario. Following these consultations, a foundation document was developed that recommended 35 specific opportunities the five-year marketing strategy should address.

Links to the foundation document may be found in Appendices 1, 2, 3 and 4.
The recommendations of this phase were:

- **Markets** - We should focus on "best bets" markets (U.S. and Canada) and leverage economic and demographic realities.
- **Consumers** - We should be consumer-focused and keep on top of emerging lifestyle trends.
- **Stay Ahead of Competitors** - We should leverage technology and effectively heed regional variations.
- **Assets** - We should leverage Northern Ontario's distinctive assets to trigger sales.
- **Product** - We should maintain a focus on the outdoors, with emphasis on fishing and touring. It's very important that we add and promote bundles for variety and new markets in addition to leveraging market-ready fall and winter products.
- **Positioning** - We need to create a distinct underlying image of the North and use it to link efforts.
- **Better the Competition** - We need to apply lessons learned and best practices from others to gain a competitive advantage.
- **Align & Coordinate** - We need to re-align zones to reflect source markets and align marketing tactics to leverage trip-planning behaviour. We should do this by delivering consistent communication.
- **Measure & Report** - It's crucial to the success of this strategy that we track success of investment and Return on Investment (ROI) continuously with the ability to adjust.
- **Get Organized** - We need to leverage the Canadian Tourism Commission (CTC) and OTMPC investments, cascading down to Northern Ontario. We also need to establish clear roles and responsibilities for everyone involved in order to equip the industry for success.

Listen To Perceptions and Act

We have to stop looking and sounding like everyone else. We must create a platform that is distinct, links all levels of marketing initiatives and rings true with consumers. Our current low awareness gives us the liberty to create a "new" Northern Ontario offer to meet contemporary segment needs:

- "Easy-to-buy-and-use" outdoors; and
- Emotional appeal, *supported with* expected and unexpected features.

Northern Ontario is perceived as lacking diversity in product and experiences with boring assets and predictable experiences among other things. We have the opportunity to illustrate Northern Ontario as an extreme, true wilderness, full of surprises with adventurous, open people. We can create a new and unique positioning for Northern Ontario.

Finding The Northern Ontario "Sweet Spot"

Northern Ontario's distinctive difference lies in our abundance of water, wilderness and natural experience. Our opportunity lies in capturing this, then having it cascade down from Canada's and Ontario's marketing efforts. The new positioning, or "sweet spot," will resonate and create engagement if it communicates an experience and sense of satisfaction that can best be found in Northern Ontario. The positioning must be equally relevant to an avid from Ann Arbor, Michigan or a cousin visiting Sudbury or North Bay from Toronto.

This strategy presents such a positioning idea.

Take Advantage Of Trends

There is an increasing disposable and discretionary income in growth segments in our markets. SARS and 9/11 hit us hard, but now these consumers, and their pent-up demand, are prime targets for a refreshed, Northern Ontario offer.

There are shifting, "hot" lifestyle trends we can take advantage of:

- **Time deprivation** - The trend is less time for leisure and more shorter vacations.
- **The Internet as a significant source of information and inspiration** - Ubiquity and richness of content are driving consumers away from traditional media.
- **Brand image (emotional/challenger brands) are the new keys to conversion and loyalty** - As a travel destination emotional brand, Newfoundland and Labrador sets the standard. It is not about scenery, it's about creativity.
- **"Re-juvenile"** - Over 50% of Disney World visitors are couples with no kids. The Boomers, an emerging affluent segment, are significant and growing.
- **People are cherishing alone time** - Northern Ontario delivers this very well.
- **Trip Rewards** - Successful destination marketers are leveraging trip rewards or feelings as draws; visuals and features are supporters, not drivers for business.
- **Family and together time** - Time together is a precious commodity for "memory" creation.
- **Make it easy to buy and use** - Trip planning tools to capture consumer leads online.

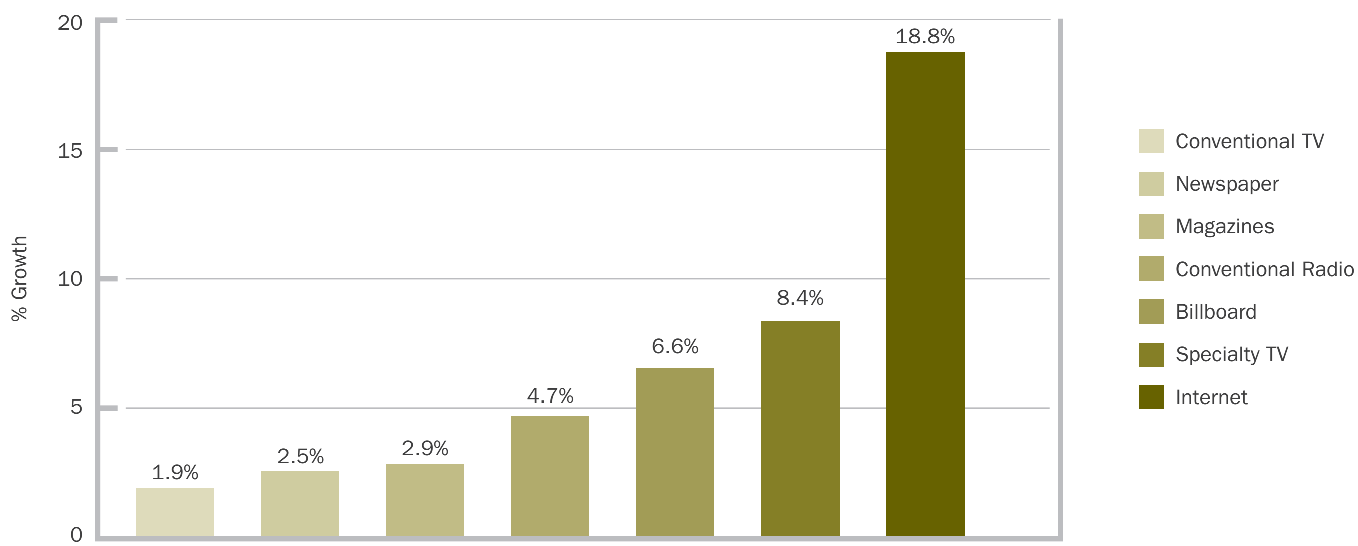
Major trends impacting the potential for Northern Ontario visits include:

- **U.S. visits** - The strong Canadian dollar, border issues and a slowing U.S. economy are impacting U.S. visits. Therefore, it is critical to create strong, distinctive positioning for the Northern Ontario offer. This will ensure the region's share of outdoor experience visits is not eroded. The offer should be bold enough that the traffic share will increase as a share of Ontario visits.
- **New and unique destinations** - Consumers are looking for new, unique destinations; as a result, mature destinations are experiencing below average growth rates. Positioning Northern Ontario as a new idea will help mitigate this potential interest erosion.
- **Competition** - More aggressive marketing by competitors suggests the platform will have to be easily coordinated and aligned for both cost effectiveness and consumer engagement.
- **Online trends** - Time-challenged consumers shop the Internet for quick, high-intensity stress breaks. The buying cycle of the online consumer needs to be recognized – 24/7 and 365 days a year.
- **Sophisticated consumers** - A variety of high quality unique experiences are key to attracting well-travelled, sophisticated consumers – a key yield development target for Northern Ontario.
- **The environment** - Interest in the environment (green tourism) is growing exponentially and sustainability is the new buzz word. Ecotourism has exploded as a concept and has captured the interest of tourism destinations around the world. Wilderness is what Northern Ontario tourism has been built on and is our competitive advantage.

Media Consumption Shifts

There is a monumental change taking place in the way consumers are accessing and using media across North America. As the chart below indicates, advertising on the Internet is projected to grow at a rate more than twice as fast as billboards and three times as fast as conventional radio over the period 2006 - 2010. It should be noted that these advertising revenue growth statistics are based on audience; advertising dollars usually follow eyeballs and ears. So these are considered media consumption trends.

Projected Annual Ad Revenue Growth: 2006-2010



Source: PriceWaterhouseCoopers

Leverage Trip Shopping And Purchasing Behaviour

The Internet and its sharing/referral features now represent the best opportunity for Northern Ontario to build its tourist business, according to Travel Activities and Motivation Survey 2007 (TAMS).

This is where decisions are made, recommendations are forwarded and testimonials are given. Northern Ontario needs major strategic online presence and content, as a singular destination.

In contrast, only 28.8% of Canadian travellers and 33.8% of American travellers who visited Northern Ontario and were involved with the planning of their overnight pleasure trips in the past two years used travel guides or brochures from state/provincial/national organizations to plan their trips. Hence, the strategy addresses this, as fundamental guidance for success moving forward.

Be Strategic About Regions In Northern Ontario

In examining the foundation document recommendations and rationale for structure of Northern Ontario regions, the strategy team consulted industry leaders and reviewed research to determine the best division for the map of the North. There was a lot of learning to suggest that the target markets, visitor profiles, products, trip purposes and trip lengths were different from west to east. In fact, two distinct regions exist, as both destinations and gateways: Northwest Ontario and Northeast Ontario. Accordingly, for the purposes of this strategy, the map is based on consumer travel patterns.

Building A Roadmap To Success

The pages that follow outline the core components of the five-year strategy, paving the way for annual plans from the government organizations in the Partnership. This strategic direction will also cascade down through the associations, destination marketing organizations (DMO), municipalities and regional organizations to present an aligned approach to driving business to tourism operators.

In each section, we have taken the approach of "funneling down," maintaining focus on both opportunities and "best bets" as guiding principles.

We examine what targets we should set as a starter, and then look at "best bets" for meeting them. A review of target markets will show us how we need to allocate efforts discreetly to build opportunistic business, while ensuring our core avid and touring business is protected.

Thanks to new data, we are able to examine Northern Ontario-specific target groups in both the U.S. and Canada, and match their outdoor interests to their demographics, travel habits, media consumption and lifestyle drivers.

We then marry the market and target to our products, recommending how to position Northern Ontario competitively and what and how to feature to our targets.

The strategy then maps out how to best organize ourselves to maximize our chances for success. We outline the key components of a refreshed marketing communications strategy. We examine stakeholder roles and responsibilities, and map out how to best expend our resources. An industry "toolkit" strategy follows, including training and human resources development recommendations.

Finally, a Return On Investment (ROI) tracking and measurement strategy is presented, as recommended in the foundation document.

Chapter 1

Objectives – What Could We Achieve? What Are Our Common Goals?

The tourism industry is facing some significant challenges - exchange rates, rising fuel costs, the Western Hemisphere Travel Initiative (WHTI), perceived anti-American sentiment, slowing U.S. economy, and elimination of the GST Visitors' Rebate Program - all contributing to declining tourism numbers.

Maintaining current visitation to Northern Ontario in such an environment will be an achievement. So now more than ever, aggressive marketing of Northern Ontario's tourism product and experiences, both domestically and internationally, is critical. The Northern Strategy is about working together recognizing that the status quo (doing the same old, same old) is no longer an option.

By supporting the Strategy, we, as an industry, will strive to return to pre-SARS levels (2002) by 2012 as outlined in the following goals:

- Increase visitation to Northern Ontario to 23.4 million person nights and 11.0 million person visits, an increase of 2.2 million person nights and 1.2 million person visits over 2004 levels.
- Increase visitor spending in Northern Ontario to $1.8 billion annually, an increase of $67 million over 2004 levels; and
- Extend average length of stay to 3.7 person nights per overnight person visit.

A strategy, to be successful, must evolve and adjust to new information, new challenges and new opportunities. As a result, as more current statistical data becomes available, these goals will be tracked and updated.

Chapter 2

"Best Bet" Targets

Following the extensive analysis and review of research in Phase I of the development of this strategy (see Appendices 1 to 4), the team accessed additional research reports and Environics data to refine the targeting from a geographic and target group standpoint. The purpose here was to zero in even further on ROI, moving forward. This continues the process of "funneling down" for clearer direction. This section presents the results of this focused approach.

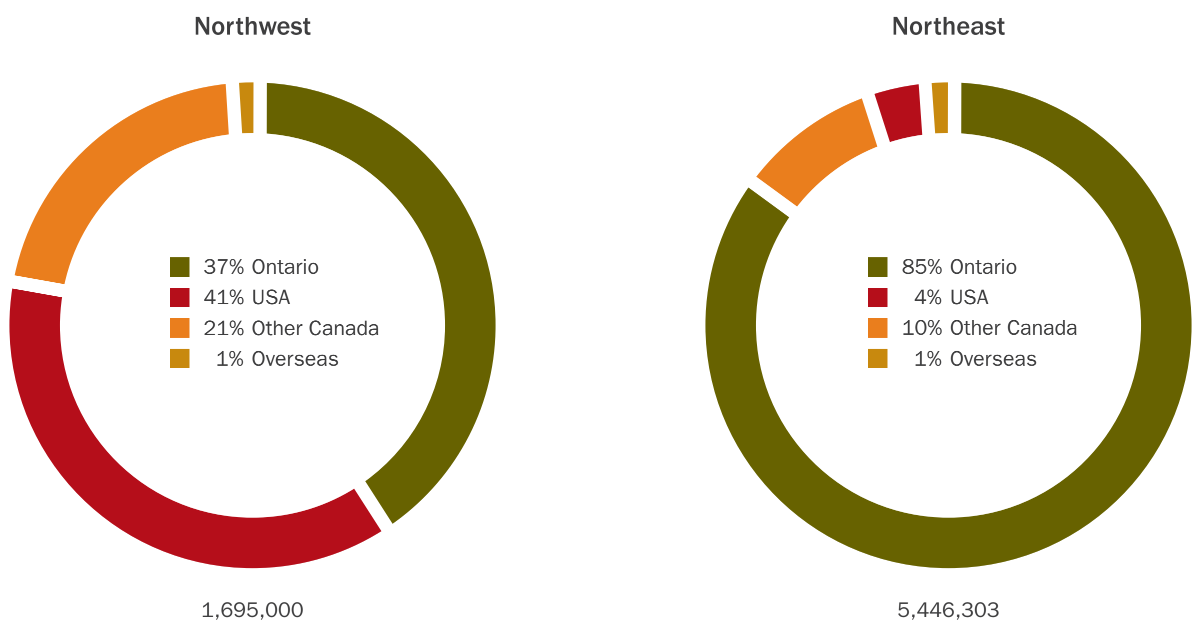
Who Are The Current Visitors?

As outlined in the foundation document, current visitors to Northern Ontario are:

- **Canadian travellers** - Tend to be younger, have higher household incomes than the average Canadian non-visitor.
- **U.S. travellers** - Tend to be older, have a higher household income, and are more educated than non-visiting U.S. travellers.
- Depending on destination region and trip purpose, **current visitors** show different activity and experience interests, as well as gender, age and income variances.

As the chart indicates, origin of visitors is quite different across the two regions of the north. There is a larger share of U.S. traffic in the west, while Ontario dominates the market for the east.

Overnight Person Visits



Source: "An Overview of Tourism in Northern Ontario - 2004" - FedNor 2006

To further analyze where specifically these visitors come from, an in-depth study was undertaken of Northern Ontario visitors from U.S. and Canadian TAMS data, cross-tabbing their geo-postal information with their demographics, travel habits and likes/dislikes, media preferences, travel booking behaviour and outdoor activity preferences. (This custom study, conducted by Environics Analytics using its Prizm clustering technique, is referenced in Appendix 5.) It enabled the definition of "best bet" target markets and target groups for Northern Ontario.

We start with target markets.

Target Markets

Introduction

Environics Analytics was engaged in 2007 to develop a series of targeted consumer profiles in both the U.S. and Ontario markets. Building upon the TAMS research, a series of consumer profiles emerged with common interests and locations. These profiles and associated data tables provide an ability to gain new understanding of our consumers and how to reach them.

Based upon Environics research as well as the research reviewed and analyzed during the development of the Strategy, the identification of "best bet" or target markets was undertaken. This process is not totally scientific, rather it comprises an analysis of available tourism research, the marketing intuition and experience of the firm, and feedback from industry - it is a process that brings together research with applied industry knowledge. It is critical to understand that not everyone will agree with the choices made for the "best bet" markets, rather this is a starting point for discussion and assessment. As tourism partners develop their own marketing strategies, they can consider these "best bet" markets along with taking into account their own research, experience and knowledge.

Overall, the strategy does not suggest that this analysis of "best bet" markets should override any currently successful targeting efforts by the industry, particularly for core avid, touring business and international markets.

The following market summary tables for the U.S. and Ontario markets identify market potential for travel to Northern Ontario.

Market Summary Tables

Key U.S. Market Summary

Destination Marketing Area (DMA) Name	Tier 1-3	Market Size	Distribution of Households (%)	Northern Ontario Target Market	Distribution of Target Households (%)	Market Potential Index	Penetration %
Boston et al, MA-NH	Tier3	2,405,584	5.15	909,929	7.44	145	37.83
Albany et al, NY	Tier3	561,076	1.20	190,575	1.56	130	33.97
Washington et al, DC-MD	Tier3	2,332,560	4.99	762,856	6.24	125	32.70
Madison, WI	Tier3	375,105	0.80	104,033	0.85	106	27.73
Philadelphia, PA	Tier3	2,969,123	6.35	814,570	6.66	105	27.43
Harrisburg et al, PA	Tier3	733,540	1.57	201,919	1.65	105	27.53
New York, NY	Tier3	7,582,327	16.23	2,010,796	16.45	101	26.52
Chicago, IL	Tier3	3,497,608	7.48	854,007	6.99	93	24.42
Milwaukee, WI	Tier3	895,628	1.92	214,496	1.75	92	23.95
Minneapolis-St. Paul, MN	Tier3	1,717,915	3.68	406,916	3.33	91	23.69
Cincinnati, OH	Tier3	897,092	1.92	194,615	1.59	83	21.69
Lansing, MI	Tier2	258,455	0.55	78,834	0.64	117	30.50
Youngstown, OH	Tier2	279,444	0.60	75,487	0.62	103	27.01
Syracuse, NY	Tier2	358,111	0.77	90,520	0.74	97	25.28
Toledo, OH	Tier2	428,866	0.92	95,047	0.78	85	22.16
Flint-Saginaw et al, MI	Tier2	477,287	1.02	99,702	0.82	80	20.89
Duluth-Superior, MN-WI	Tier2	175,759	0.38	34,315	0.28	75	19.52
Cleveland et al, OH	Tier1	1,560,483	3.34	426,956	3.49	105	27.36
Rochester, NY	Tier1	398,534	0.85	106,745	0.87	102	26.78
Detroit, MI	Tier1	1,951,239	4.18	468,907	3.84	92	24.03
Pittsburgh, PA	Tier1	1,176,914	2.52	264,978	2.17	86	22.51
Buffalo, NY	Tier1	648,723	1.39	132,122	1.08	78	20.37

Source: Environics Analytics

Key Ontario Market Summary								
Region Name	**Markets**	**Market Type**	**Market Size**	**Distribution of Households (%)**	**Northern Ontario Target Market**	**Distribution of Target Households (%)**	**Market Potential Index**	**Penetration (%)**
Northwest	Thunder Bay (ON)	CMA	54,299	1.10	29,029	2.14	194	53.46
Northeast	Greater Sudbury (ON)	CMA	69,875	1.42	34,290	2.52	178	49.07
Eastern	Kingston (ON)	CMA	64,894	1.32	28,513	2.10	160	43.94
Central	Barrie (ON)	CA	70,151	1.42	27,976	2.06	145	39.88
Southwest	Windsor (ON)	CMA	135,099	2.74	52,061	3.83	140	38.54
Niagara	St. Catharines - Niagara (ON)	CMA	167,775	3.40	59,765	4.40	129	35.62
Southwest	Kitchener (ON)	CMA	185,455	3.76	61,416	4.52	120	33.12
Southwest	London (ON)	CMA	202,053	4.10	66,460	4.89	119	32.89
Ottawa	Ottawa-Gatineau (ON/QC)	CMA	347,084	7.04	105,736	7.78	111	30.46
Southwest	Hamilton (ON)	CSD	210,524	4.27	58,411	4.30	101	27.75
GTA	Greater Toronto Area	GTA	2,137,404	43.33	311,302	22.91	53	14.56

Source: Environics Analytics

NOTE: Definitions for interpreting the tables can be found in Appendix 8

How to Read Market Summary Tables

Using the Key Ontario Market Summary as reference, we can draw the following conclusions. For example, in the Niagara region there are approximately 60,000 households that demonstrate an interest in the experiences and products offered in Northern Ontario. These households have a stronger propensity to travel to Northern Ontario and offer a greater potential as a target group. In fact, they are 29% more likely to visit Northern Ontario for pleasure (index 129). Further, 35.62% of the households in Niagara are from the target group, suggesting that this may be a strong market for Northern Ontario.

In comparison, Toronto-GTA has a smaller Market Potential Index (MPI) (53), but this lower potential has to be assessed against the fact that the GTA is a large market with 22.91% of the target households overall representing the largest volume of households (311,302). Toronto-GTA remains a good opportunity.

The Domestic Summary Table also suggests that northerners visit Northern Ontario. For example, Thunder Bay has 54,299 total households which represent 1.10% of Ontario households. More than 29,000 households are in the Northern Ontario target group. These target households represent 2.14% of all target households in Ontario. Thunder Bay is almost twice as likely (index of 194) to visit Northern Ontario destinations. In fact, one in two households in Thunder Bay is travelling within Northern Ontario.

Looking at the U.S. Summary Table, the Boston area has 2.4 million households of which 909,929 are target households who have a stronger propensity to travel to Northern Ontario. With a Market Potential Index of 145, Boston residents are 45% more likely to visit Northern Ontario for pleasure and 38% of the households in Boston are in the target groups. While Boston has the highest potential index, other factors, such as distance from Northern Ontario and travel costs, should be considered in any decision to enter into this market.

Tier 1 cities straddle the border with Ontario, and while they may have lower market potential indices compared to Boston, Albany and Washington, their proximity means lower travel costs to get to Northern Ontario.

Determining "Best Bet" Target Markets

The following tables reflect the analytical work of Environics with the knowledge gained from other sources of research. The ranking of the "best bet" markets is based on the summary tables as prepared by Environics (Appendix 5) and a subjective analysis that examines:

1. Our understanding of these markets relative to Northern Ontario (i.e., proximity)
2. Current economic and political issues
3. Adjacent communities/urban centres that can be targeted on a complementary or spill-over basis as well as on a micro-regional basis
4. A balance of markets that serve the Northwest and Northeast and wherever possible serve both markets

The "best bet" markets below are suggestions. It is up to the reader to determine whether these could apply by taking into account local market realities and a detailed examination of the segmentation profiles (p.17-19).

"Best Bet" Ontario Markets

Markets	Market Type	Northwest Market Assessment Rank against Size & Proximity	Rank against Target group Interest	Northeast Market Assessment Rank against Size & Proximity	Rank against Target group Interest
Greater Toronto Area	GTA	3	8	1	1
Hamilton (ON)	CSD	7	3	3	3
Ottawa-Gatineau (ON/QC)	CMA		10	2	2
London (ON)	CMA	5	4	5	4
Kitchener (ON)	CMA	8	5	6	6
St. Catharines - Niagara (ON)	CMA	9	7	4	5
Windsor (ON)	CMA	4	6	7	10
Barrie (ON)	CA	6	9	9	7
Kingston (ON)	CMA	10		10	8
Greater Sudbury (ON)	CMA	1	2	8	9
Thunder Bay (ON)	CMA	2	1		

Two key northern cities, Thunder Bay and Sudbury, demonstrate a high Market Potential Index based on the proportion of the local populations that are active in outdoor experiences and regional travel. Local and regional marketing organizations should carefully examine inter-regional markets to determine if increases in travel within the North can be stimulated.

An opportunity may exist for innovative bundling of experiences within major Ontario cities that are on the travel route that could feature a northern city and outdoor experiences.

The GTA (including Oshawa and excluding Hamilton) was highly ranked in spite of the low MPI. The MPI calculation ignores the implication of proximity to Northeastern Ontario and the sheer size of the GTA population with a demonstrated interest to travel to Northern Ontario (311,302 households). While the calculation is skewed due to the size of the GTA, the marketplace is and will remain an important source market.

Hamilton, London and Ottawa have ranked well with strong interest for Northern Ontario and relative proximity for Northeast Ontario and as far west as Sault Ste. Marie. Windsor and Barrie represent markets that, depending on availability of resources, may be considered.

Other Canadian Provinces

Winnipeg and Western Canada were identified as an opportunity for the Northwest given proximity, economic and market conditions, and TAMS data indicating that Northern Ontario experiences and products are relevant to these markets. Further, Northwest Ontario is recognized as an outdoor and summer vacation destination in the Manitoba marketplace.

Quebec was also identified as an opportunity for the Northeast given its proximity, market conditions, anecdotal comments received during the consultations and TAMS data indicating that Northern Ontario experiences and products are relevant to this market.

OTMPC is commissioning Environics Analytics research to develop an analysis for Quebec and Western Canada.

"Best Bet" U.S. Markets

DMA Name	Tier 1-3	Northwest Market Assessment Rank Against Size & Proximity	Rank Against Target Group Interest	Northeast Market Assessment Rank Against Size & Proximity	Rank Against Target Group Interest
Cincinnati, OH	Tier3				
Minneapolis-St. Paul, MN	Tier3	1	1		
Milwaukee, WI	Tier3	2	2		
Chicago, IL	Tier3	3	8		
New York, NY	Tier3				
Philadelphia, PA	Tier3			8	8
Harrisburg et al, PA	Tier3				
Madison, WI	Tier3	8	6		
Washington et al, DC-MD	Tier3			3	4
Albany et al, NY	Tier3			4	2
Boston et al, MA-NH	Tier3			1	1
Duluth-Superior, MN-WI	Tier2				
Flint-Saginaw et al, MI	Tier2	6			
Toledo, OH	Tier2	7			
Syracuse, NY	Tier2				
Youngstown, OH	Tier2		3	5	3
Lansing, MI	Tier2		5		
Buffalo, NY	Tier1				
Pittsburgh, PA	Tier1			2	5
Detroit, MI	Tier1	4	7		
Rochester, NY	Tier1			7	7
Cleveland et al, OH	Tier1	5	4	6	6

In determining the U.S. "best bet" markets we must assess the markets for their relevance to the two consumer regions (Northeast and Northwest Ontario) due to the overriding impact of proximity and travel patterns.

Northwestern Ontario “Best Bet” U.S. Markets

As indicated earlier in the report, determining the priority “best bet” markets is a balance of research and on-the-ground market knowledge tempered by economic factors. This is true in assessing the first three priority markets for Northwestern Ontario.

Minneapolis-St. Paul is ranked as the number one U.S. market for Northwestern Ontario due to the proximity of the market and 406,916 households that relate to the experiences Northern Ontario offers and will therefore consider travel to Ontario.

Milwaukee is ranked as the number two “best bet” market for Northwestern Ontario on the same basis as Minneapolis with 214,496 households that are targets for Northern Ontario. This is complemented by the proximity of Madison with 104,000 households. By focusing a campaign on Milwaukee, Minneapolis and Madison, great synergies could be realized. In addition, media costs are reasonable in comparison to larger markets.

Chicago remains a priority market for Northwestern Ontario despite its low Market Potential Index rating. The sheer size of the identified consumer segments of 854,000 households tempered against the proximity and tradition of Northern Ontario as an outdoors destination supports this market as a priority for Northern Ontario.

Youngstown, Cleveland, Lansing and Detroit round out the ranking of priority markets for the Northwest based on the sheer size of the number of households favourably disposed to our experiences and destination. While media costs may be higher in these markets, the opportunity to examine regional tactics in Michigan and Ohio encompassing these markets creates an opportunity.

Northeastern Ontario “Best Bet” U.S. Markets

Similar to the Northwestern “best bet” markets, the Market Potential Index is only one factor in determining the “best bet” market recommendations.

Boston may be a developmental market to consider. It has 909,000 (MPI 145) households in relative proximity to Ontario and ultimately Northeastern Ontario with a demonstrated interest in our experiences. While the cost of media is high, this market is targeted by the CTC and OTMPC and offers an opportunity to cascade and build from their respective efforts. Caution must be exercised in building strategies in this marketplace and must lever the efforts of CTC and OTMPC.

Washington DC, with an MPI of 125 and 762,000 households, represents the same issues and opportunities as Boston. This market is targeted by the CTC and OTMPC; any efforts must lever and cascade from their tactics.

Albany New York ranks as a “best bet” market for Northeastern Ontario based on the 190,000 households identified as targets for Northern Ontario and the opportunity to cluster markets to centres such as Rochester, Syracuse and Buffalo, all of which have a long tradition as markets for Northern Ontario.

Youngstown Ohio represents a cross-over opportunity between the Northwest and Northeast with 75,497 households together with the priority ranked market of Cleveland and other potential Ohio markets for regional campaigns. From a proximity perspective, this market is more relevant to Northeastern Ontario.

Philadelphia’s ranking as a priority market balances the size of target market households at 814,570 against the overall proximity to Ontario and the cost of media. A regional campaign that combines Pittsburgh, Erie and Harrisburg could extend the reach of a campaign beyond Philadelphia.

“Best Bet” Target Groups

A large amount of marketing research data has been analyzed to evolve the most opportunistic target markets for the strategy. Because there will be a transition from a volume-driven marketing effort to a yield-driven strategy, the target groups outlined below represent the “best bets” as a goal for the industry. We envision that we will transition to these targets over a period of a year to 18 months, in the early part of the strategy.

Accordingly, the strategic direction below should be interpreted as aspirational, yet solidly grounded in research and consumer needs analysis.

Broadly speaking, the travel market generally in North America is defined by the four target groups:

- **Silent Generation 65 plus** - They seek stimulation, variety, security and no surprises.
- **Boomers 45-60** - They seek variety, adventure, discovery and some surprises.
- **Gen X 30-40** - They need zest in living, adventure and surprises.
- **Gen Y 19-29** - They need zest in living, adventure, fast relaxation and bragging rights.

When the aforementioned general target groups are funneled down and defined for Northern Ontario, the picture looks like:

Market	Target	Product Match
Low Hanging Fruit		
Avids, nature consumers	Rest and respite group	Tranquility, new sources of fish/animal/ adventure, reliable, comfortable
Boomers – empty-nester, urban adventure travellers	Relaxation, rejuvenation, discovery as stimulation, create "first mover"	Authentic experiences, journey + destination, active outdoor
Families	Outdoor adventure, kid-centered, bond family, create memories	"Easy to buy and use" nature, family attractions, touring
Hot Prospects		
Young singles and couples, urban professionals	Respite from fast lifestyle, zest for living/ adventure, "surprise me," bragging rights	Unexpected, new adventure experiences

Environics Analytics has analyzed the market potential, demographics, travel behaviour, key behaviours, travel motivations and market of residence of all potential 66 consumer clusters in North America. Based on this analysis, which is a cross tabulation of geo-postal data with travel research from TAMS, the following target groups have been established for the two regions of Northern Ontario. It should be noted that the legacy activities of fishing, hunting, outdoors adventure and soft adventure have been incorporated into the target definitions.

The "best bet" targets represent 53% of population households in the tier 1, 2 and 3 states (see Appendix 7) in the U.S. and 27.4% of population households in Ontario overall. Within the definitions of target groups that follow, a wealth of data exists on specific clusters: who they are, where they live and what their outdoor habits are.

United States Targets

Affluent, well-educated mature empty nesters (3,487,928 HH in Tier 1-3)

- Are frequent flyers, belong to country clubs, like golfing, skiing, travel guides and word of mouth for information
- Motivations: empathy, social intimacy, dreams, social responsibility, global consciousness
- Enjoy cross country skiing, ice climbing, skating, skiing, trophy fishing, golfing
- Stay at ski resorts, fly-in wilderness lodges
- Watch TV, read newspapers and magazines, use the Internet

Middle class retirees with adult children (3,570,097 HH in Tier 1-3)

- Enjoy North American travel and cruises, are members of frequent flyer programs, like word of mouth
- Motivations: threatened by technology, entrepreneurial, appearance driven
- Attend golf tournaments, kayaking/canoeing, opera, aboriginal experiences
- Stay at remote fly-in wilderness lodges, sea-side resorts, private campgrounds
- Heavy viewers of morning TV, heavy newspaper and magazine readers, low Internet users

Middle class singles and couples with young children (1,991,229 HH in Tier 1-3)

- Enjoy domestic and foreign travel, travel by rail, are members of frequent flyer programs
- Motivations: appearance driven, personal fulfillment, saving on principle, formalities
- Like skiing, ATV excursions, motorcycling, windsurfing, snowboarding, big game hunting
- Stay at country inns, farms, ski resorts, fly-in wilderness lodges, camp/grounds
- Light users of media except for radio

Mix of young and old singles and couples – predominantly young (3,173,393 HH in Tier 1-3)

- Enjoy foreign and domestic travel, several modes of transportation, gambling, winter activities
- Motivations: ostentatious consumption, duty, in-formal, national pride
- Like snowmobiling, ice fishing, golfing, cross-country skiing, northern lights, hunting big game
- Stay at lakeside/riverside resorts, campgrounds, remote wilderness lodges
- Heavy Internet users and moderate TV viewers

Canada - Ontario Targets

Older, upscale, university educated couples with adult children (251,514 ON HH)

- Enjoy frequent travelling, access to a cottage, golfing, skiing, prefer purchasing travel online
- Motivations: personal fulfillment, control, intuition, diversity, importance of aesthetics
- Like Aboriginal activities, water activities, motorcycling, golfing, mountain climbing/trekking
- Stay at cooking school accommodations, wilderness lodges
- Read newspapers and magazines, use the Internet, do not like flyers

Well-off, middle-aged blue collar couples with teenage children (448,717 ON HH)

- Enjoy Ontario and Florida travel, access to a cottage, team sports
- Motivations: spontaneity, balanced lifestyle, ethics, emotional connection
- Like theme/amusement parks, cycling, hunting birds, snowmobiling, farmer's markets
- Listen to radio, read magazines, use the Internet

Mature working class suburban and town couples and retirees (528,428 ON HH)

- Are active travellers, travel in North America, fans of nature
- Motivations: outdoor experience, seek information, price conscious, Nationalism
- Enjoy ice fishing, golfing, motorcycling, flora, trekking, water sports
- Stay at RVs, houseboat accommodations
- Multi channels – heavy TV, radio, newspaper and direct mail, light Internet users

Mid-scale, middle-aged town and rural families with high school/trade education levels (130,064 ON HH)

- Enjoy touring, camping, provincial parks, nature, family vacations, hobbies
- Motivations: everything outdoor, family vacations, information, escape
- Like trophy fishing, house-boating, pro sports, horseback riding, hunting birds
- Stay at remote outposts, RVs while travelling
- Above average TV and radio, read direct mail, low Internet users

Note: The analysis uses TAMS and geo-postal data to ascertain who has travelled to Northern Ontario and what their general outdoor habits are. As such, these are "best bets." However, emerging targets showing high propensity for Northern Ontario, as identified in the foundation document, are not to be ignored. These include Gen X and Gen Y, as well as emerging affluent Boomers - they are all medium-to-heavy online users. Accordingly, the Internet strategy for Northern Ontario will become the primary lead generator from within both the emerging and "best bet" categories.

Links and details of the "best bet" target groups may be found in Appendix 5, as well as links to detailed analysis and tables of these target groups by geographical market source.

Chapter 3

Defining Ourselves Competitively: Pre-Emptive Positioning

The positioning challenge for Northern Ontario has always been to position itself uniquely against its near competitors with consistent, distinctive messaging. For Northern Ontario to truly create an emotional brand that resonates with the emerging target groups above, we recommend that positioning be centered on what our visitors feel as opposed to what we offer or who we are. Northern Ontario will, therefore, become the destination where the experience creates a sense of satisfaction unlike any other destination.

According to TAMS in June of 2007, the most important pleasure and vacation trip motivators for Canadians were getting a break from their day-to-day environment (69.5%) and relaxing and relieving stress (67.3%). For Canadians who have visited Northern Ontario, there were only two other categories of benefits that 50% of travellers seek - create lasting memories and enrich relationships - both of which are important factors for Northern Ontario. For the American traveller who has visited Northern Ontario, the top three trip motivators were: relaxing and relieving stress (73.3%), getting a break from their day-to-day environment (68.3%), and creating lasting memories (60.7%). So, positioning has to fulfill the emotional aspirations of a vacation experience generally, while delivering content and sought-after attributes.

The logic is best expressed in the visual below. Sure, it's what we are. You then add what we offer. But, what makes us unique is what visitors feel. As a key stakeholder said, as part of the consultations, "North of Superior: It got the wrinkles out of my soul." That's what makes Northern Ontario unique.

What We Are
Canada's Great Outdoors

What We Offer
New, surprising nature adventures

What Visitors Feel
"Got the wrinkles out of my soul"

This is all about:

- first, the reward of how people feel (what they have achieved, what motivated them to come);
- what they experienced; and
- what they can share.

The Unique Northern Ontario Proposition

Our distinct difference, our sweet spot, will become how people react on an individual level to our diverse, inspiring and grand experiences. People will visit Northern Ontario to totally escape and discover their own souls again. They will be inspired here like nowhere else because there is more here: more outdoors, more ways to refresh and exhilarate, and a more welcoming environment, thanks to our diversity of offers and the warmth of our people.

Emotional deployment/words/thoughts that express the idea further:

Gasp. Scent. Sigh. Fresh. Refresh. Revive. Rest. Respite. Renew. Peace. Reach. Fly. Find. Forge. See. Soul. Clean. Green. Awe. Aspire. Breathe.

Visual Strategy

Always include photos and video materials with a representative person of the target market doing distinctive outdoor activities, showing feelings and emotional response. Show water, people, wildlife, and landscapes.

Positioning Platform

It's a couple, exhilarated in the rain. It's the ultimate stress release, complete relaxation.

Chapter 4

Matching It All Up For Success

Products

Product → **Market Behaviour and Habits** → **Target Engagement**

The key to successful stimulation of the market will be to marry the target group motivation and behaviour from within the "best bet" geographical markets and match it to ideal products this target group is looking for. Currently, the product for Northern Ontario tourism is:

- **What you can see** - Outdoor environment, vistas, lakes, vast wilderness
- **What you can do** - Fishing and hunting, hiking, bird/animal watching, kayaking, canoeing, back-country camping, lodges, fly-in and drive-in, etc. As well as, cultural and heritage experiences, city excursions, attractions and special events, sports and business travel
- **Where and how you can do it** - Physical products – attractions, hospitality and retail businesses, camps, parks, lodges, outfitters, city and rural hotels/motels

In each of the major areas of Northern Ontario, the physical products are:

Northwestern Ontario – examples	Northeastern Ontario – examples
Trophy fishing	Summer, fall and winter wilderness adventures
Family/buddy fishing tournaments	Science North and Dynamic Earth
Summer and winter wilderness adventures	Wikwemikong Pow-Wow
Pukaskwa National Park	Killarney Provincial Park
Quetico Provincial Park	Algonquin Park
Woodland Caribou Provincial Park	Missinaibi River
Sleeping Giant Provincial Park	Chapleau Game Reserve
Bloodvein River	Timber Train
Lake Superior Circle Tour	Polar Bear Express
ACR Train/Agawa Canyon Experience	Shania Twain Centre and Gold Mine
Canadian Bushplane Heritage Centre	Polar Bear Habitat and Heritage Village
Fort William Historical Park	Festival of the Sound
Moccasin and Voyageur Trails	Champlain Route
Trails – Trans Canada, Ontario Federation of Snowmobile Clubs	Trails – Trans Canada, Ontario Federation of Snowmobile Clubs

Product Development

Throughout the consultations and in the foundation document, the strengths of the Northern Ontario product, as well as its gaps, were discussed. A number of gaps were identified that will require development and funding. The most significant gaps were the lack of competitively priced air package access for the short getaway vacation market, lack of city hotel business and leisure travel facilities, and aging infrastructure (roads, signage, rest stops, tourist information centres, parks facilities, attractions and suppliers/operators). There were also discussions on the need to invest in and develop products such as spas, theatre, fine dining and other entertainment offers – as these are secondary drivers for the “best bet” targets most likely to come to Northern Ontario for an outdoor experience.

A key recommendation was the need for a product development strategy for Northern Ontario, to support the successful implementation of this marketing strategy.

Two Strategies To Match Product, Market And Consumer

There are two effective ways in which we can match the product to the market’s behaviour to engage the Northern Ontario target:

Itinerary Planning

This strategy reflects the desire of consumers to now use the Internet to build their own itineraries. The type of adventure and outdoor aficionado that Northern Ontario will attract in coming years starts the adventure of the holiday online. Accordingly, the primary emphasis of product strategy will be itinerary building.

Ease of trip planning: A full interactive planning tool will be incorporated into the new Northern Ontario online portal. This will allow search by vacation experience and will be intuitive to match online purchasing navigation and behaviour. It will leverage best Internet search and fulfillment/e-commerce practices, responding to target behaviour patterns (driven by trip motivators). Hierarchies will be based on:

- Interactive mapping
- Region
- Reward category – “best bets” list
- Type of vacation experience – things to think about
- Favourite activities
- Accommodations sought
- Suggested itineraries – road trips
- Testimonials and reviews (links)

Bundling

The second most important strategic pillar for product strategy is to present bundles that marry target interest and behaviours with product features for Northern Ontario. Accordingly, a bundle strategy will be developed with the following key components:

- Cascade from best of the CTC and OTMPC packages and experiences
- Marriage of diverse target interests and behaviours into new Northern Ontario specific bundles
- Include “best bets” experiences, for ease of purchase and delivery
- Leverage regional differences

Examples, based on current bundling, are:

In each of the major areas of Northern Ontario, the physical products are:			
Bundle	**Who**	**Why**	**What**
Pursue Your Passions	Boomer Targets – U.S. and Canada	Relaxation, rejuvenation, favourite sights and sports	Customizable drive and touring focusing on active outdoor, major sights
Family Getaways	Family Targets – U.S. and Canada	Outdoor adventure that bonds family, creates memories	Northern city exploring, family resorts and camping, outdoor activities and festivals, outdoor attractions
Angling Absolute	Avids, nature consumers	Relaxation, rejuvenation, fishing, water sports	Fly-in, lodge-based super fishing and water based higher end holidays
Just You and Nature Getaways	Urban Boomer and hot prospect young targets – U.S. and Canada	Back to nature respite, alone/ independent rejuvenation	Tweak Indulgences and Getaways above to focus on remote destinations and nature exploration adventures
Ontario Fall Festival Getaways	Boomers and urban young professionals – U.S. and Canada	Respite, relaxation, adventure, bonding	Re-packaging of Passions for three to five-day short breaks, targeted to off-season festivals and attractions and light outdoor activities

Chapter 5

Change Marketing Delivery To Meet Consumer Needs

Marketing Communications Strategies

The strategic direction that follows prioritizes how marketing communications tools can be leveraged against the "best bets" targets and markets described. These strategies are directional in nature. In the industry section of this document, roles and responsibilities for the various levels of tourism infrastructure in Northern Ontario are outlined. The importance and use of these strategies depends upon the role of specific organizations in marketing communications. Since the Internet, for example, crosses all levels of infrastructure and dramatically impacts the success of marketing for Northern Ontario, the strategy below has implications for all stakeholders. Consumer touch point activity, on the other hand, is more important for regional marketers and individual operators. The following sections outline the main marketing, communication and promotion strategies for the five-year period.

Internet / Database

The primary engine of the new marketing strategy will be a new portal, showcasing and sharing the feelings, experiences and distinctive features of the region. The use of single-minded positioning, simplicity of content, usability tailored to the way potential visitors shop and stunning imagery will all form part of this new "entry" into Northern Ontario.

This site will be linked on the splash page of www.ontariotravel.net, and will also be reached via a new northern URL. The portal will serve as an over-arching Internet "magnet" for Northern Ontario. It does not replace what's out there; it serves to capture searching Internet traffic and direct it into the existing online "eco-system" of sites operated by the industry and government. Its primary functions will be:

Database marketing - Through search engine optimization, the portal will capture a broad footprint for potential travellers, and direct them through a series of offers and ideas to sites that allow them to close in on a Northern Ontario experience. Data for re-marketing, such as permission-based inquiry data and refer-a-friend emails, will be captured as prospects navigate. Operator, association (i.e., Northern Ontario Regional Tourism Associations) and DMO industry sites will "catch" the leads, hopefully converting them.

Experience demonstration and reinforcement - This portal will host the Northern Ontario positioning, brought to life through testimonials.

Social media - As the platform for Northern Ontario social media, the portal will drive experiential and database sharing activity. Really Simple Syndication (RSS) feeds (news aggregators online), sites like Facebook and MySpace, blogs, even the interactive potential of Google Earth and Second Life will be explored.

Viral marketing - Build consumer database, through outbound activation and refer-a-friend viral marketing techniques. Details on the content, navigation and CRM strategies of the portal may be found in Appendix 9.

A dedicated resource within the Northern Ontario tourism partnership will be critical to stay on the "bleeding edge" of Internet and social marketing trends. We recommend a dedicated resource in each NORTA, dedicated to daily blog, viral sharing and other social media deployments of experiences and stories.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Consumer Touch Points

Traditionally, consumer and tradeshow participation has been a primary consumer touch point utilized by operators, NORTAs, DMOs and other stakeholder groups. Currently, Northern Ontario marketers participate in shows, despite the fact that they have a high cost per visitor acquisition and are, as a marketing communications medium, on the decline in terms of both frequency and attendance. For the next five years, the recommended strategy is to limit show participation to those that are:

- located in geographic target markets;
- attended by "best bets" target group members; and
- permit floor activation techniques, such as field marketing and postcarding.

Over the five years, we envision that the number of shows will decline. In order for the cost per visitor to drop, we recommend a show visitor activation strategy. This strategy will be to drive show visitors to the Northern Ontario marketing portal through contemporary consumer activation techniques, such as unique URLs, contest participation codes and limited-time offers. By driving consumer participants to a website, touch points become a prospect and lead more quickly, and allow the sponsoring organization to create a database for follow-up, referral marketing, and re-marketing at a later date.

Since the publications and collateral volume are dramatically reduced over the period of this strategy, replaced by a high performing Internet presence, it is envisioned that organizational participation costs will be reduced and tangible results increased.

Public Relations

The use of public relations as a marketing tool is growing by leaps and bounds, as consumers disassociate themselves from the fragmented and ever increasing number of advertising messages they are receiving on a daily basis.

The public relations strategy for the marketing of Northern Ontario will be to support the positioning and experiences that best exemplify the distinctive nature of the "best bets" offer. A story development "machine" will be built on the industry Intranet, which will be re-purposed for media relations activities.

Content will build the stories and allow visitors to share their experiences and positive testimonials of their Northern Ontario visits. The collection of these stories and supporting content will be made possible with media relations tools contained in the industry toolkit. Blogs, social media, news feeds and classic media relations outreach will be used to support the "Northern Ontario. Aaahh!" positioning on an increasing basis across the five years.

Trends will be monitored to ensure the appropriate blend of traditional and new media will be used, per target group habits. The statistics accessed indicate the movement is towards online, and among more than just young people. These trends, coupled with statistics on traditional media consumption, will be closely watched for changes in momentum and/or direction.

Familiarization Trips

Criteria for media and trade familiarization trip funding will be based on the ability of the visiting media to expose Northern Ontario virally on the Internet. This ability will extend to the portrayal of the reward of feelings, based on the distinctive benefit of more outdoor. Finally, the media should be requested to provide permission-based access to their intellectual property and content, even if copyright-protected, allowing all layers of Northern Ontario marketing and sales to share sourced content.

Publications And Collateral

We will rely more heavily on the communications channels preferred by people planning to travel to Northern Ontario. The new strategy will be less paper, more Internet. Publications will be used as fulfillment pieces for pre-qualified leads, with less emphasis on directories and more on trip planning tools.

Consumers want information specific to the experience that facilitates their purchase decision, or lure-style pieces. Collateral should, therefore, be fulfillment pieces/guides for requests from shows, sites, 1-800 numbers, tourism offices and kiosks.

Co-op Marketing

Target groups and geographic parameters will direct both the content and funding priorities for co-op marketing efforts. Criteria would include activities favoured by “best bet” targets, supported through familiarization trips and other trade promotion initiatives. Effectiveness measurement and reporting will be built into every co-operative program.

Brand Promotion

This strategy assumes that the CTC and OTMPC’s major print and television campaigns will cascade into Northern Ontario’s markets and target groups. We recommend that specific Northern Ontario executions be developed for the five-year plan period, using the “best bet” targets’ stated preferences for outdoor activities as the featured content. (Guidance for this by market and target group preferences may be found in the links in Appendix 5.)

Chapter 6

Changing How We Work To Align, Focus, & Win New Business

You Play, You Align, You Win

These strategies will lie dormant unless the Northern Ontario tourism industry re-visits and refines its operations model. Phase II of this project, the document you are currently reading, recognizes that the foundation document calls for a cascading, co-operative approach to industry alignment. Following industry consultations in November 2007, as well as stakeholder, in-depth interviews, we have concluded that there are five cornerstones to success in the coming years. These are all based on the imperative that if we buy into this strategy, work together and align, we'll all win.

Roles And Responsibilities Are Clarified

The purpose of outlining roles and responsibilities is to ensure that the strategic focus of each group is defined, their contribution and strengths are leveraged and tasks are divided up so that there is minimal duplication. Clearly, these roles will evolve in the early years, particularly as the NORTAs, DMOs, regional tourism associations, pan-Ontario tourism associations, municipalities and cities find their links to the strategy and leverage the opportunities it presents. This means that the cascading approach can be applied to the annual activity, eliminating overlap and clarifying how the stakeholders can align efforts and work together to present a unified voice, effectively deployed to generate leads.

The Cascading Strategy

This is a strategy for all of Northern Ontario tourism. If the whole gamut of players and stakeholders is to align, the advantages of the cascading approach, recommended in the foundation document, have to be crystal clear. There is a part for everyone to play in the success of the turnaround.

The chart on the next page presents how the cascading strategy will be deployed over the five-year lifespan of this plan and summarizes roles and responsibilities, with OTMPC identified as the lead marketer.

Cascade At Work	CTC	OTMPC	Pan-northern associations, NORTAs, cities, municipalities	Industry suppliers and operators	Partnership: OTMPC, FedNor, MNDM, Ministry of Tourism, MNR
Strategic	Increasing interest in visiting Canada	Increasing awareness and interest in Ontario tourism experiences	Interest consumers in a specific product category or area and provide in-market support	Fulfill the promise	Support for product development and supplier education
Roles and responsibilities	Canada destination promotion internationally • experientially segmented, continuing to raise awareness and partner at provincial/major DMO level	Through OTMPC Northern and Outdoor Committees: Lead marketer • Lure the consumer • Maintain and develop content (portal and media relations) • Campaigns link to strategy	Support and implement strategy, carry message, cross-link, participate as appropriate in Northern Ontario programs	Adopt the strategy, sales, delivery: leverage and link to Northern Ontario Marketing Strategy	Focus on implementation of strategy, education & capacity building, product development
Branding campaign – overall platform push		Lead overall awareness of Northern Ontario; carry the message	Support role, carry message, cross-link, regional marketing programs	Carry brand message online and in advertising	Develops platform and toolkit
Initial development of creative		Develop the tools and the messages	Adapt creative platform to regional/subject area content		
Industry toolkit		Develop, distribute, update	User	User	Fund
Itinerary-building components		Stimulate and push consumers to itinerary sources	Builder	Build packages and deliver itinerary elements	Supports itinerary and product development
Internet portal	Links	Maintain and develop content and interactive strategies	Cross link, increase Internet marketing through all channels and capture consumer interest; carry Northern Ontario messaging, content aggregators	Regional and own website, with adoption of overall Internet strategies, carry Northern Ontario message	Builds portal
Consumer touch points	International stimulation, trade shows such as ITB	Re-visit current shows, be strategic re: objectives, audiences, messages	Revisit current shows, be more strategic, carry message, leverage or align with OTMPC-funded shows	Revisit current show and assess effectiveness; capture and re-market to leads	
Public relations and familiarization trips	Explore opportunities with Northern Ontario focus	Media outreach templates, fam trips that support the Northern Ontario objectives, messages and content deployment strategies	Participate in OTMPC-led fam trips, develop own fam trips that support Northern Ontario brand and strategy of lead generation	Supply testimonial, video and other content	
Publications and collateral		Campaign specific collateral; only publications supporting OTMPC message	Fulfillment, in-market and qualified lead, lure pieces for distribution at shows, campaign specific	Fulfillment	
Co-op marketing program		Campaign specific for Northern Ontario; OTMPC core segment programs like Provincial Families	Participate as appropriate in specific Northern Ontario programs by OTMPC; buy into core OTMPC programs	Campaign specific participation	

Cascade At Work	CTC	OTMPC	Pan-northern associations, NORTAs, cities, municipalities	Industry suppliers and operators	Partnership: OTMPC, FedNor, MNDM, Ministry of Tourism, MNR
Travel trade	International travel trade	Leverage core travel trade for Northern Ontario, media development and content within portal • generate interest and story/experience consistency	Cities – travel trade programs, specific information markets – pursue them	Pursuing specific international markets of interest	
Measurement		Lead researcher; new measures for Northern Ontario tracking and reporting on progress	Tracking and reporting	Lead data suppliers, tracking and incented confidential sales reporting	Support training
Supplier development		Resource to training and development	Participate in training opportunities; identify gaps and needs	Participate in training, identify gaps and needs	Support training
Product development					Product development strategy to support brand promise
Stakeholder communications		www.connexion-north.ca owner/manager	www.connexion-north.ca contributions	www.connexion-north.ca contributions	www.connexion-north.ca contributions

Maintaining Competitive Advantage

For this strategy to be successful, there needs to be an ongoing commitment to continuously undertake research to ensure Northern Ontario maintains a competitive advantage. The research tools that have proven to be most useful in structuring this strategy should be continued and updated on an annual basis.

- **Environics Analytics** - The matching of geo-postal data, Northern Ontario traveller demographics, outdoor interest and media habits needs to be updated to ensure all levels of marketing and sales in Northern Ontario tourism stay focused on “best bets.”
- **Market Priorities** - As part of TAMS cross tabulations, market indexing should be continued and updated annually to ensure top eight “best bets” markets stay updated as well.
- **Secondary Research** - Focus groups and other qualitative methods should be continued amongst potential Northern Ontario travellers to ascertain the power and engagement potential of the premises of this plan. By doing focus groups on an annual basis in key target markets, Northern Ontario tourism stakeholders will be able to keep abreast of consumer desires, behaviour changes, competitive attitudes and opinions.

In addition, because of the importance of the Internet to the success of this strategy, updating of development and training tools for the industry should be ongoing.

Spending Money And Human Resources Wisely

To effectively implement the new strategy and achieve the implementation of the cascading approach and the alignment of efforts, the current monies spent on marketing initiatives and human resource efforts will need to shift over the course of the strategy. That is to say that any investment made by funding partners or any marketing decision made by industry partners in the North should be guided by the principles of the strategy.

It is imperative that the Northern Office of the OTMPC dedicate itself to the implementation of the strategy and provide leadership by directing its current budget and staff towards this goal.

The Strategic Tourism Development and Marketing Partnership for Northern Ontario has a critical role to play to support the efforts of the lead marketer with strategic marketing investments including the development and implementation of the portal and capacity/skill building programs.

The environment that the northern tourism industry operates in is a dynamic place that shifts and changes as new opportunities and challenges emerge. Seeking new investment from the public and private sector should be a priority for all parties in this document to increase the marketing spend to reach the “best bet” markets and drive consumers to the portal, which will then cascade to the partners and ultimately to the suppliers who can fulfill the promise.

The following budget allocation strategy will assist all parties in understanding the shift in effort required to address the changing marketing landscape.

Budget Strategy

The new marketing investment strategy will support more Internet marketing and public relations, and will result in lead generation and targeted industry co-operative marketing programs. Less effort and dollars will be spent supporting trade and consumer shows, publications and other immeasurable initiatives. The following example illustrates this shift.

Effort Allocation Shift

% 2007		% 2012
6	Internet content and database	40
3	Public relations	6
19	Consumer and trade touch points	3
57	Publications	20
1	Industry lead co-operative programs	20
10.5	Funding programs	2
2	Industry advancement & training	3
0	Toolkit	2
0.5	Research	2
0.5	Measurement and reporting	1
0.5	Industry communications	1

NOTE: This represents a percentage breakdown of existing northern marketing efforts by associations, DMOs, NORTAs and OTMPC.

The Right Tools For Everyone

The five-year marketing strategy will only be successful if it can be applied directly and easily to the marketing efforts of the Northern Ontario tourism industry and its players. A digital toolkit will be made available to the industry in 2009, in an effort to supply everyone within the infrastructure with easy-to-use-and-manage tools and processes. This content will not only allow users to easily adapt to the cascading marketing programs from Ontario and Canada, it will also ensure a coordinated and aligned look, feel and sound to marketing communications emanating from the North.

The strategy is to supply the industry with cohesive, comprehensive and convenient modules, via the www.connexion-north.ca intranet, on the following key tactical components:

- **User Package** - A simple, how-to-participate guidebook to the toolkit will show industry stakeholders where to access templates, links and content modules for their marketing programs. Simple rules of participation, including enhanced support and a subscriber fee, will be included.
- **Internet** - This section will explain how to link with the Northern Ontario portal, how to provide and benefit from content, and how to take advantage of the portal's prospect database.
- **Public Relations** - This section will contain templates to allow regions, operators and suppliers to create stories, enlist testimonials and create visual/video material for media relations. Media lists, media outreach and tracking/reporting would be the responsibilities of the NORTAs.
- **Copy and Creative Signature Units** - This is a guidebook of downloadable campaign content tools. It would contain cascading and regional packaging modules, regional guidebook content, traveller "how to" information, etc. Creative signatures would be those developed by OTMPC for Northern Ontario regional and activity/experience marketing needs.
- **Copy Layout Units** - Graphic component templates will be included for on and offline deployment of regional and operator/supplier tools.
- **Photo and Video Resources** - Downloadable photo and video resources will be included for consistency; extreme feelings/experience content.
- **Consumer Touch Point Resources** - This section will contain a resource centre for database development and tools for use in consumer touch point programs, postcards, field marketing materials, targeted consumer show participation templates, portable booth rental information, etc.
- **Industry Intranet** - The intranet will be the primary industry and stakeholder communication vehicle for Northern Ontario tourism internal communications and plan management. Its features will include registration, password-protected results reporting (incentive-based), news from the front lines, research-based planning tools, blogs, sharing of stories and customer testimonials for Public Relations (PR), Frequently Asked Questions (FAQ), "ask the editor" column and contacts directory. The intranet will also be the resource for the toolkit content outlined above.

Effective Development And Training Already In Place

From the Phase I foundation document as well as through discussions with industry representatives at the consultations, it became clear that increased support is required to allow operators and other providers to improve product marketing and delivery. Enhanced training support, delivered through the Tourism Keys (www.tourismkeys.ca) program, should be developed and deployed during the early stages of this strategy.

Some examples are:

- Internet and database marketing
- Business skills
- Customer service
- Co-operative and aligned marketing
- Public relations
- Experience delivery
- Co-op promotion

On-going Communication As A Strategy

A major challenge to alignment and co-operation has been communication among stakeholders. During the five-year strategy, the partnership will keep stakeholders continuously informed, through enhanced communications and intelligence sharing at www.connexion-north.ca. This intranet will become the primary industry and stakeholder communication vehicle for Northern Ontario tourism internal communications and plan management.

It will include a registration protocol. Incented, password-protected results reporting will be developed. These reports will be aggregated to input sales performance and trends. There will be news from the front lines, research-based planning tools for individual operators (mining the research tool database), blogs, sharing of stories and customer testimonials for PR purposes. FAQ, an "ask the editor" column and a contacts directory will be augmented with industry toolkit updates.

Chapter 7

Keeping TRACK: Measuring Success And ROI

The foundation document identifies the clear need to develop an ROI measurement system for tracking the success of this five-year strategy. Not only will such a system support accountability, it will also allow the lead marketer and stakeholders to adjust tactics under the strategy, based on feedback. The tools provided will allow adjustments to all program components, particularly if the assessment is based on program tracking measurement and results performance.

Two levels of measurement are recommended: marketing objectives achievement and marketing program tracking.

Marketing Objectives

Measurement will be based on tracking visitor source and volume, visitor revenue and average person nights. A formula to start tracking cost per visitor will also be developed.

Marketing Program Tracking

This will primarily measure portal usage. Each consumer who lands in the portal will self-identify and will be asked for permission to receive communication. This will result in approximately 20% capture, consistent with industry standards. These prospects will be stimulated through outbound mail to convert to leads, through cascading and portal engineering. Associations and operators will convert these to sales (norm is 4%), who will visit, become ambassadors, refer friends and eventually re-visit.

This is the formula for Northern Ontario sales improvement:

Engage PROSPECTS → Turn them to LEADS virally/using database mining → industry “catches” pre-qualified leads and fulfills/closes the sale → visitors become online Northern Ontario ambassadors and refer friends and family → REFEREES become visitors → exponential opt-in database growth and mining → METRICS-DRIVEN

Additionally, reporting mechanisms will be developed to regularly track:

- Top-of-mind awareness
- Share of mind for Northern Ontario
- PR effectiveness measure – Media Rating Points for Northern Ontario
- Co-op program participation by industry
- Business results reporting by industry
- Consumer uptake measurement – packages, portal participation, database enhancement and performance
- Industry intranet usage at www.connexion-north.ca

Chapter 8

Call To Action: An Executive Summary

What will be required to make this work? A concerted effort on the part of the governments, associations, DMOs, municipalities and the operators to commit to a new partnership is the starting point. Increased investment to support new and innovative tactics and marketing reach, clarity of functions and roles and thoughtful, strategically directed implementation are all givens as well.

The foundation document was clear in its 35 recommendations. This strategy will allow tourism in Northern Ontario to not only turn around its fortunes, but to become a best practices example in its competitive set. To do this will require the following to be adopted as a way of doing business.

Top Ten List

Listen to the consumer - Be consumer-focused rather than industry-focused, and leverage trends and behaviours strategically.

Focus on "best bet" markets and targets - We cannot be all things to all people. Allocate our scarce marketing efforts to focus on the places and people with the most potential, but not limited to them. Leverage the demographic and economic realities, and make sure we capture the potential of Ontario itself as a market.

Start at home - Leverage the potential of Ontario itself as a market.

Stay ahead of competitors - We should leverage technology and effectively bring our story and our experience to the Internet. We need to apply lessons learned and best practices from others to gain a competitive advantage.

Align behind a single idea, a positioning - We should leverage Northern Ontario's distinctive assets to trigger sales. We can create a distinct underlying image of the North and use it to link marketing efforts.

Develop product advantage - We should maintain outdoor focus with emphasis on fishing and touring. We need to add and promote bundles for variety and new markets, in addition to leveraging market-ready fall and winter products.

Align and coordinate - We need to re-align zones to two, to reflect source markets. We must also align marketing tactics to leverage distinctive trip-planning behaviour by our clearly defined target groups.

Get organized - We need to leverage CTC and OTMPC investments, cascading down to Northern Ontario, and establish clear roles and responsibilities for everyone involved in order to equip the industry for success.

Measure and report - It's crucial to the success of this strategy that we track the success of the investment and ROI continuously to stay on target, meet objectives and stay ahead of our competitors.

Trust each other - The goodwill factor is about to play a big role in turning Northern Ontario tourism fortunes around. Let's not miss the window of opportunity.

The Time Is Now!

We have no choice but to align marketing efforts and leverage the Northern Ontario brand to minimize confusion, clutter and competing brands in the marketplace. We can all work within the existing organizational framework to bring product to market.

We need to engage in supporting the cascading approach for marketing by leveraging the efforts of CTC and OTMPC for Ontario generally, while each playing our own specific role.

We can do better than 9.8 million person visits to Northern Ontario. And, we can get them to stay longer, spend more and recommend Northern Ontario to others. It's all here.

Let's make this a living, breathing strategy; one that confronts apathy, builds co-operation, and fights competition.

Appendices

Appendices 1 through 4 can be found by visiting:

www.connexion-north.ca

1. Phase I Foundation Document No. 1 –
   Examination & Discovery: Northern Ontario Tourism Industry Situational Analysis
2. Phase I Foundation Document No. 2 –
   Opportunity Assessment: “Best Bets” For Success
3. Phase I Foundation Document No. 3 –
   Stakeholder Consultation Summary
4. A Foundation Document For A Five-Year Tourism Marketing Strategy For Northern Ontario
5. Target Market Analysis (additional Environics research at www.connexion-north.ca)
6. Canadian travellers to Northern Ontario (additional research at www.connexion-north.ca)
7. U.S. Tier Market Explanations And Map
8. Table Definitions
9. Creating A Portal For Northern Ontario

Appendix 5

Target Market Analysis

"Best Bet" U.S. Markets

DMA Name	Tier 1-3	Market Size	Distribution Of Households (%)	Northern Ontario Target Market	Distribution Of Target Households (%)	Market Potential Index	Penetration %	Northwest Market Assessment Rank Against Size & Proximity	Rank Against Target Group Interest	Northeast Market Assessment Rank Against Size & Proximity	Rank Against Target Group Interest
Boston et al, MA-NH	Tier3	2,405,584	5.15	909,929	7.44	145	37.83			1	1
Albany et al, NY	Tier3	561,076	1.20	190,575	1.56	130	33.97			4	2
Washington et al, DC-MD	Tier3	2,332,560	4.99	762,856	6.24	125	32.70			3	4
Madison, WI	Tier3	375,105	0.80	104,033	0.85	106	27.73	8	6		
Philadelphia, PA	Tier3	2,969,123	6.35	814,570	6.66	105	27.43			8	8
Harrisburg et al, PA	Tier3	733,540	1.57	201,919	1.65	105	27.53				
New York, NY	Tier3	7,582,327	16.23	2,010,796	16.45	101	26.52				
Chicago, IL	Tier3	3,497,608	7.48	854,007	6.99	93	24.42	3	8		
Milwaukee, WI	Tier3	895,628	1.92	214,496	1.75	92	23.95	2	2		
Minneapolis-St. Paul, MN	Tier3	1,717,915	3.68	406,916	3.33	91	23.69	1	1		
Cincinnati, OH	Tier3	897,092	1.92	194,615	1.59	83	21.69				
Lansing, MI	Tier2	258,455	0.55	78,834	0.64	117	30.50		5		
Youngstown, OH	Tier2	279,444	0.60	75,487	0.62	103	27.01		3	5	3
Syracuse, NY	Tier2	358,111	0.77	90,520	0.74	97	25.28				
Toledo, OH	Tier2	428,866	0.92	95,047	0.78	85	22.16	7			
Flint-Saginaw et al, MI	Tier2	477,287	1.02	99,702	0.82	80	20.89	6			
Duluth-Superior, MN-WI	Tier2	175,759	0.38	34,315	0.28	75	19.52				
Cleveland et al, OH	Tier1	1,560,483	3.34	426,956	3.49	105	27.36	5	4	6	6
Rochester, NY	Tier1	398,534	0.85	106,745	0.87	102	26.78			7	7
Detroit, MI	Tier1	1,951,239	4.18	468,907	3.84	92	24.03	4	7		
Pittsburgh, PA	Tier1	1,176,914	2.52	264,978	2.17	86	22.51			2	5
Buffalo, NY	Tier1	648,723	1.39	132,122	1.08	78	20.37				

"Best Bet" Ontario Markets

Region Name	Markets	Market Type	Market Size	Distribution Of Households (%)	Northern Ontario Target Market	Distribution Of Target Households (%)	Market Potential Index	Penetration %	Northwest Market Assessment Rank Against Size & Proximity	Rank Against Target Group Interest	Northeast Market Assessment Rank Against Size & Proximity	Rank Against Target Group Interest
Northwest	Thunder Bay (ON)	CMA	54,299	1.10	29,029	2.14	194	53.46	2	1		
Northeast	Greater Sudbury (ON)	CMA	69,875	1.42	34,290	2.52	178	49.07	1	2	8	8
Eastern	Kingston (ON)	CMA	64,894	1.32	28,513	2.10	160	43.94	10		10	9
Central	Barrie (ON)	CA	70,151	1.42	27,976	2.06	145	39.88	6	9	9	7
Southwest	Windsor (ON)	CMA	135,099	2.74	52,061	3.83	140	38.54	4	6	7	10
Niagara	St. Catharines - Niagara (ON)	CMA	167,775	3.40	59,765	4.40	129	35.62	9	7	4	5
Southwest	Kitchener (ON)	CMA	185,455	3.76	61,416	4.52	120	33.12	8	5	6	6
Southwest	London (ON)	CMA	202,053	4.10	66,460	4.89	119	32.89	5	4	5	4
Ottawa	Ottawa-Gatineau (ON/QC)	CMA	347,084	7.04	105,736	7.78	111	30.46		10	2	2
Southwest	Hamilton (ON)	CSD	210,524	4.27	58,411	4.30	101	27.75	7	3	3	3
GTA	Greater Toronto Area (ON)	GTA	2,137,404	43.33	311,302	22.91	53	14.56	3	8	1	1

Source: "Northern Ontario Segment Analysis - October 2007" Environics Analytics

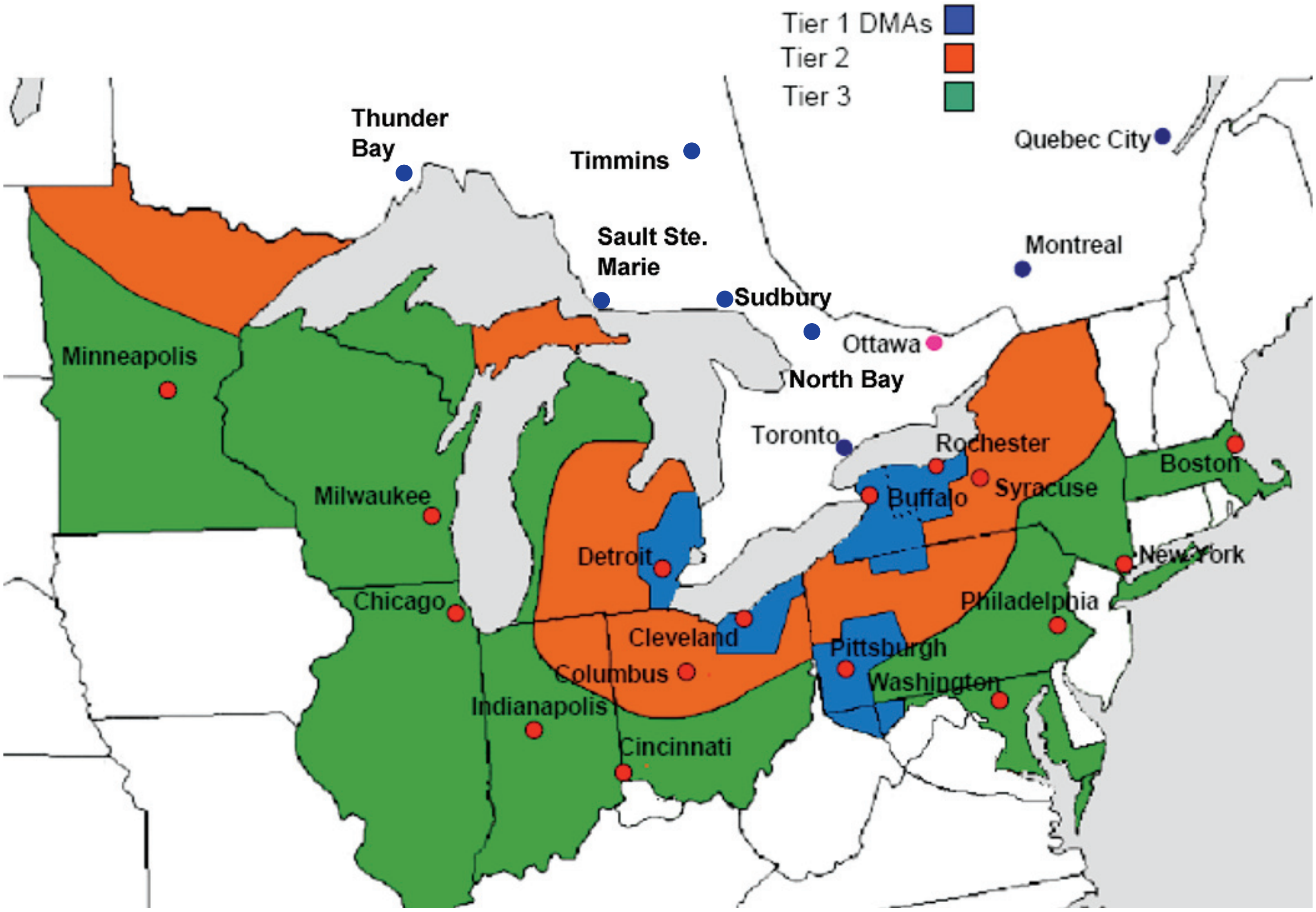
Visit www.connexion-north.ca for detailed information on the target segments.

Appendix 6

Canadian Travellers to Northern Ontario	Canadian travellers to Northern Ontario over last 2 years	As % of total Canadian travellers to Northern Ontario in past 2 years	Canadian travellers to Northern Ontario as % of each region's total travellers in past 2 years
Total	3,758,623		
Atlantic Provinces	**85,344**	**2.3%**	**5.8%**
Halifax	17,955	0.5%	7.1%
Other Atlantic	67,389	1.8%	5.6%
Quebec	**358,328**	**9.5%**	**7.5%**
Quebec City	42,001	1.1%	9.1%
Montreal	175,958	4.7%	7.3%
Gatineau	30,326	0.8%	16.6%
Other Quebec	110,043	2.9%	6.3%
Ontario	**2,926,414**	**77.9%**	**36.2%**
Ottawa	131,245	3.5%	22.0%
Kingston	31,415	0.8%	33.9%
Oshawa	88,889	2.4%	39.2%
Toronto	1,116,403	29.7%	32.4%
Hamilton	217,471	5.8%	46.5%
St. Catharines-Niagara	84,556	2.2%	34.9%
Kitchener	117,298	3.1%	39.0%
London	117,028	3.1%	37.8%
Windsor	77,407	2.1%	36.0%
Greater Sudbury	61,169	1.6%	58.2%
Thunder Bay	50,687	1.3%	60.2%
Other Ontario	832,846	22.2%	41.5%
Manitoba	**173,521**	**4.6%**	**25.3%**
Winnipeg	132,067	3.5%	30.2%
Other Manitoba	41,454	1.1%	16.6%
Saskatchewan	**33,627**	**0.9%**	**5.4%**
Regina	8,649	0.2%	6.5%
Saskatoon	11,214	0.3%	7.1%
Other Saskatchewan	13,764	0.4%	4.1%
Alberta	**102,762**	**2.7%**	**4.6%**
Calgary	35,661	0.9%	4.7%
Edmonton	40,817	1.1%	5.9%
Other Alberta	26,284	0.7%	3.3%
British Columbia	**78,626**	**2.1%**	**2.6%**
Vancouver	42,225	1.1%	2.7%
Victoria	11,130	0.3%	4.8%
Other British Columbia	25,271	0.7%	2.2%

Source: "Canadian Travellers who Visited Northern Ontario" Ministry of Tourism - June 2007

Appendix 7
"Best Bet" U.S. Markets



Source: TNS Canadian Facts

Tier	% of total U.S. population	Number (000s)	Origin of travellers to Northern Ontario (%)	Number (000s)	Travellers to Northern Ontario as % of each tier's total travellers
Tier 1[1]	5.1%	11,376	18.1%	257	2.3%
Tier 2[2]	4.9%	10,875	18.75	265	2.45%
Tier 3[3]	29.5%	65,802	33.8%	480	0.7%
Tier 4[4]	60.5%	134,795	29.5%	418	1.3%

1 Near Market DMAs representing advertising focal points for Ontario tourism and exhibiting elevated levels of past visitation to the province (Rochester, Buffalo, Cleveland, Pittsburgh and Detroit). Pittsburgh, however, is not a key advertising market.

2 Remaining states in the U.S. within 300 km of the Ontario border (e.g. Minneapolis – St. Paul).

3 All remaining areas of the following states not falling into Tiers 1 and 2 (Minneapolis, Wisconsin, Michigan, Illinois, Indianapolis, Ohio, New York, Maine, Vermont, New Hampshire, Massachusetts, Connecticut, Rhode Island, Delaware, Pennsylvania, Maryland, Cincinnati and Washington DC).

4 Remainder of the U.S.

Appendix 8

Table Definitions

Definitions For Interpreting The Summary Tables

Region Name: Name of the Ontario Regions

Market Type:

Census Metropolitan Area (CMA) - A CMA is an area consisting of one or more adjacent municipalities situated around a major urban core. To form a CMA, the urban core must have a population of at least 100,000.

Census Subdivision (CSD) - A CSD is a general term for a municipality as defined by Statistics Canada.

Census Agglomeration (CA) - A CA is an area consisting of one or more adjacent municipalities situated around a major urban core. To form a CA, the urban core must have a population of at least 10,000.

Tier:

Tier 1 – Near market DMA representing the primary advertising focal points for Ontario tourism and exhibiting elevated levels of past visitation to the province.

Tier 2 – Remaining states in the U.S. within 300km of the Ontario border.

Tier 3 – All remaining areas of the following states not falling into Tiers 1 and 2 (Minnesota, Maine, Vermont, Pennsylvania, Wisconsin, Maryland, Cincinnati DMA, Michigan, New Hampshire, New York State, Illinois, Massachusetts, Delaware, Indiana, Connecticut, Washington DC DMA, Ohio, Rhode Island)

Tier 4 – All remaining states.

Total Market Size: This section quantifies the total size of the market on a household basis by region. The section includes total number of households and the distribution across the markets in Ontario. Markets are standard Census Metropolitan Areas except for a few circumstances to conform to region boundaries as best as possible. In total there are 4,932,503 households in Ontario. The Census Metropolitan Area of Windsor has 135,099 total households representing 2.74% of the total households (Distribution of Households).

Northern Ontario Target Market: This section quantifies the size of Northern Ontario's target market on a household basis by market. The section includes total number of target households and the distribution across the regions in Ontario. The Windsor market has 52,061 target households which represents 3.83% of the total target households in Ontario (Distribution of Target Households).

Market Potential Index and Penetration: This section calculates the potential by index and per cent penetration. The Index is a calculation that provides the relative importance of the target households in the market compared to the total households in the market. An index value of 100 is average. A value greater than 100 indicates that there is a higher proportion of target households in the market. [(Proportion of target households (%) / Proportion of total households (%)) *100]

Penetration (%) is the proportion of target households in the market or market share.

Appendix 9

Creating A Portal For Northern Ontario

The guidelines below recommend a content, usability, navigation and engineering structure for the new Northern Ontario Tourism portal.

A Website That…

- Profiles the region and encourages visitors to "Explore"
- Highlights the variety of Northern Ontario "Experiences"
- Facilitates the "Sharing" of experiences
- Delivers "Travel Tools" that answer questions the viewer might have
- Allows Industry to profile their services
- Links to activity-specific websites that already deliver detailed information (www.gofishinontario.com, www.paddlingontario.com, CTC Tourism profiler, etc.)
- Deploys viral marketing techniques for prospect database development and fulfillment

Marketing Delivery

- Rich photography and video experiences
- Rotating content elements (expanded screen real estate)
- Sharing & experiential tools (blogs, video, testimonials, two-way communication)
- Facilitate & encourage industry to profile themselves on the website
- Database development (through sharing tools and newsletter subscriptions)

Keys To Success

- Showcase Northern Ontario by leveraging strong imagery
- Create emotional connection and desire to visit through video profiles, shared experience tools (podcasts, blogs, My Adventure, postcards, surveys)
- Website is easy to navigate
- Industry participation
- Search Engine Optimization (SEO) specific to Northern Ontario

'My Adventure'

- An area for website visitors to upload their experiences, photos, and text or video submissions

Blogs

- An open forum on popular fishing attractions/ destinations
- Resulting in increased profile on search engines

Podcasts

- A roving reporter highlighting and exposing the hidden gems of Northern Ontario

Powerful Imagery

- Leverage core activities and emotions (this is NOT just a fisherman holding up prize fish, but rather – the happiest fisherman you've ever seen, in full fishing gear, on a nice boat, near a new dock, on a pristine lake, as the sun sets on a spectacular lake/treeline)

Links

- In much the same way as the activity specific websites function, there should be a website that showcases Northern Ontario and its regions.

Activity specific websites:

- http://www.paddlingontario.com/
- http://www.atvontario.com/
- http://www.gofishinontario.com/
- http://www.gorideontario.com/
- http://www.snowmobileinontario.com/
- http://www.huntinginontario.ca/
- http://www.ontariotravel.net/outdoors

Google Earth & Maps

- Mapping attractions/destinations on Google Earth – this is another way to create entry points and awareness of Northern Ontario destinations. A similar program has been extremely successful for Nova Scotia.

Contests

- To build database of contacts
- Viral marketing

Search

- By activity
- By experience
- By length of stay
- By season
- By type of vacation

SEO/ Search Engine Marketing (SEM) (Northern Ontario Specific)

- It will be important to do search engine optimization for the Northern Ontario region - as undoubtedly this will be an under-serviced area of the www.ontariotravel.net program

Rotating Content

- Used to "virtually" expand available screen real estate, increase profile of content pieces and rotate interest segments

Social Networking

- Extending the messaging through existing communication tools
- The ability to make content available to others through My Space and Facebook profiles
- Database capture; viral marketing opportunity

Portal Architecture

Explore	Experience	Share	Travel Tools
Destinations • Ontario Northwest • Ontario Northcentral • Ontario Northeast • See it all – Google Earth **Vacation Ideas** • Seasonal getaways • Distinctive Getaways • Family fun **Accommodations Search** **Scenic Road Trips** • Download maps **Visitors Guides** • Download	**Outdoor Adventures** • Fishing • Hunting • Canoe & kayaking • Wildlife viewing • Golfing • Caving & climbing • Cycling & mountain biking • Hiking • Horseback riding **Winter Adventures** • Ice fishing • Boarding & skiing • Cross country & snowshoeing • Snowmobiling • Other winter activities **Parks** • National Parks • Provincial Parks **Attractions** • Events & festivals • Major attractions • Unique attractions **Arts & Entertainment** • Theatre & galleries • Sports & gaming **Culture & Heritage** • Aboriginal • Museums & historic sites **Relax and Indulge** • Dining • Shopping • Spas	• Video • Destinations • Testimonials • Podcasts • Hidden gems of the north • Blogs • My adventure galleries • Recent adventures • Share your adventure • Google Earth • Tell us what you think • Postcards & images	**Maps – download** **Travel Essentials** • Banking & currency • Currency converter • Entry into Canada • Metric conversion • Visitor information centres • Travel tips **Transportation** • Air & shuttle • Bus • Car & motor home rentals • Highway information • Train • Distance calculator **Weather** **Visitors Guides – download** **Packages and Tours** • Vacation packages • Local tour operators **FAQ**

Global Navigation

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