

2017

AUTO/RV TOURING



NORTHERN ONTARIO AUTO & RV TOURING TOURISM PLAN



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Priorities for Tourism in Northern Ontario

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



Mission

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



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

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

TNO Strategic Plan 2017-2020

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

01 Governance & Administration

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

02 Product Development (including research)

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

03

Marketing

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

04

Workforce & Industry Training

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

05

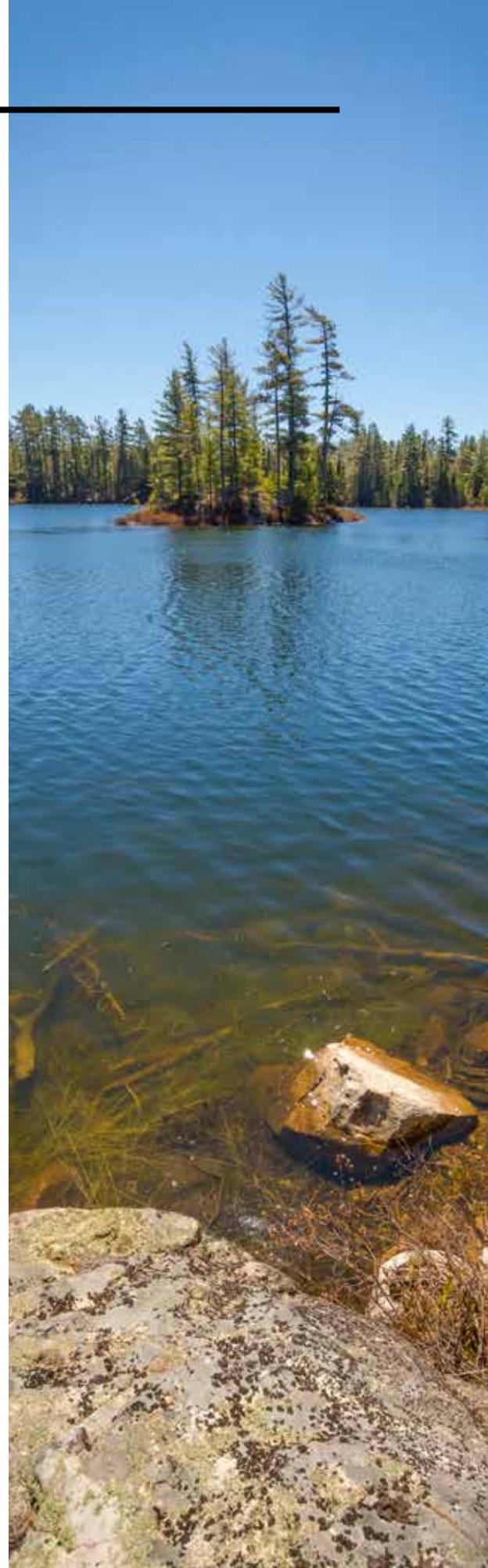
Investment Attraction

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

06

Partnership

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



Marketing Strategy 2017-2020

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

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

Marketing efforts will focus around:

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

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

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

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

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



TNO Product Development Plan & Research

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



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

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

The reports focus on the following areas:

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

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

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



1.3 » TNO Product Development Plan & Research

The *Northern Ontario Product Development Strategy*, also completed in 2014 examined not only current tourism products that were available, but also experiences that were under development and future product opportunities. It matched these experiences with priority markets to determine where Northern Ontario should focus its product development efforts in the coming years as follows:

PRIMARY FOCUS	SECONDARY FOCUS	TERTIARY FOCUS
Fishing	Motorcycle Touring	Boating/Great Lakes Cruising
Nature & Adventure	Hunting	ATV
Auto/RV Touring		Snowmobile
Gateways & Urban Communities		Aboriginal

Recommendations in the report not only focused on the tourism experiences in Northern Ontario, but encouraged an administrative shift to focus more resources on product development and increasing the quality of available experiences.

As a result of recommendations in the *Product Development Strategy*, six Northern Ontario Product Development Committees were formed in 2015. These teams aid and advise Tourism Northern Ontario on the enhancement and development of their product area in Northern Ontario.

Auto & RV Touring – the Current Context & Research Findings

Case Studies from
Ontario, Canada
and Beyond



National Scenic Byways Program, United States– Economic Impact

The National Scenic Byways program, a federal U.S. program that designates roadways and highways based on their archaeological, cultural, historic, natural, recreational and scenic qualities generates significant economic impact. A 2012 study completed by the America's Byways Resource Center notes the economic impact of select byways:

Blue Ridge Parkway
(755 km - Virginia/North Carolina) generates estimated **\$1.5 billion** total business sales and **9,300** jobs.

Cherokee Hills Byway
(88 miles - Oklahoma) generating estimated **\$85.3 million** total business sales and **924** jobs.

Woodward Avenue Automotive Heritage Trail (27 miles – Detroit Michigan) generating estimated **\$234,000** total business sales and **1.2** jobs.



Cabot Trail, Cape Breton, Nova Scotia – Iconic Driving Tour

The Cabot Trail makes a 297 kilometre scenic and winding loop around much of Cape Breton Island, passing through Cape Breton Highlands National Park at its northernmost point. The route skirts the edges of the park, at times clinging to steep ocean side cliffs offering spectacular views. On the island's Atlantic side, towns like Ingonish preserve the influence of the early Scottish settlers, while on the gulf side, French-speaking towns such

as Chéticamp still celebrate their Acadian heritage. Cabot Trail road trippers can feast on fresh seafood, stay in hospitable inns and B&Bs, hike some of the 25 trails in the national park and enjoy the scenery from the many roadside "look offs" while exploring the island's two distinct cultures. The iconic nature of this route, with its sweeping scenery and its cultural connection make it world famous, thereby attracting international visitors.



Route 66: Chicago Illinois to Los Angeles, California – Iconic Driving Tour

Route 66 continues to attract visitors from around the world. Spanning over 2,000 miles between Chicago and Los Angeles, this historic road passes through the heart of the United States on a diagonal trip that takes in some of the country's iconic roadside scenes. The route's historic connection to small town America has sustained it as a

touring route attraction since it was built in 1926. The roads have been replaced by major highways, but the attraction of the smaller, quintessential route lives on for tourists. Supported by neon signs and kitschy stops, attractions like Pops, a soda shop turned route attraction have established themselves based on the popularity of the route.



Pacific Coast Highway: San Luis Obispo to Monterey, California – Iconic Driving Tour

California's Route 1 is a scenic touring route running the length of the state. The section from San Luis Obispo to Monterey with its Big Sur coastline and mountain views running along the edge of dramatic cliffs is the main attraction for this "must do" driving route which passes through wine country and past well-known tourist attractions like Hearst Castle.

Current Provincial & National Context

The baby boomer market is aging, creating a wealth of tourists with the time and resources to travel. Touring by Auto and RV are growth markets and each have specific service and infrastructure needs that must be met.

The 2012 *Economic Impact of the Canadian Recreational Vehicle Industry* report by Harris Decima, provides insight into the current context for this market.



- Production of RVs and sales have generally followed the macroeconomic trends with a peak in 2007 followed by several years of decline and then moderate increases from 2009 to 2011 but not reaching 2007 levels.
- Compared to the auto sector, RV declines have been more marked and have not recovered to the same levels.
- In 2011, there were **512,955** RV owners in Ontario (**10.5% of households**), **275,318** in Quebec (**8.1% of households**) and **94,759** owners in Manitoba (**20.3% of households**). Alberta has the highest percentage of households owning RVs (**430,338 owners, 31% of households**).
- Ontario received the highest proportion of destination RV nights in 2011 at **32.8%**.
- Top eight activities that go along with RVing are camping (**67%**), visiting a beach (**28%**), visiting parks (**26%**), wildlife viewing (**25%**), hiking (**24%**), cycling (**20%**), fishing (**20%**) and boating (**20%**).

Northern Ontario's Current Auto & RV Touring Situation

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

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

To determine focus areas, detailed product and market assessments were undertaken. They examined capacity, quality and competitive advantage of current and potential products and reviewed the profile, needs and longer-term sustainability of core and niche visitor markets specific to Northern Ontario. Based on the research undertaken as part of the strategy, the resulting product-market match identified the Northern Ontario products with the most opportunity. Among these products was Auto & RV touring "to showcase and highlight the natural features, stories, communities, culture and heritage that are Northern Ontario and gateways and urban communities that act as both hubs and destinations"².

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

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



² Tourism Northern Ontario, Northern Ontario Product Development Strategy, 2014.

Specific recommendations found in the strategy surrounding the primary focus area Auto & RV Touring include:

- Investigate opportunities that focus on touring routes in two destination areas with the most opportunity to appeal to new and growth markets (Thunder Bay to Sault Ste. Marie/Lake Superior Shoreline and Northern Georgian Bay hub and spoke model);
- Develop itineraries for iconic road trips including fly and drive offers for international visitors;
- Continue to invest in Georgian Bay Coastal Route and Group of Seven touring route products to bring these projects to fruition; and
- Begin discussions surrounding the creation of a Canada-wide program similar to the U.S. Byways program.³

Many activities related to Auto & RV Touring have been undertaken since the product development strategy was released and four key routes exist, some of which have been in market for several years.

- The *Georgian Bay Coastal Route* is a tourism product development initiative led by the Georgian Bay Destination Development Partnership that is striving to create an iconic touring route around Georgian Bay. The route, which has been in development over the last 10 years, features an RV tour as well as themed routes around the bay.
- *Ride Lake Superior*, a motorcycle touring route initiative led by Algoma and Tourism Thunder Bay, centres around the Lake Superior Circle Tour and its bucket list ride along the north shore of this Great Lake. The initiative, which is supported with a tour planning website was built with market-ready, motorcycle-friendly operators and has become very successful at attracting motorcycle tourists to the region.
- The *Temiskaming Loop*, Northeastern Ontario's main motorcycle touring route, guides riders from North Bay to Temiskaming Shores. Following the Ottawa River and the shores of Lake Temiskaming, the route winds its way through Northern Ontario wilderness, marrying three distinct cultures as it makes its way through several First Nations communities and includes a trek along the Quebec side of the Ottawa River. Recent developments have seen the expansion of the route into an Auto & RV tour around Lake Temiskaming. A passport program has been developed and is in-market.
- *Group of Seven Touring Routes* are currently being developed with the support of OTMPC. This initiative, which strives to attract niche travellers with an affinity for Group of Seven art and encourages them to travel to several stops within the region, has been a direct result of TNO-supported investment in Group of Seven product development in Northern Ontario.

³ The full list of *Strategy* foundations and recommendations can be reviewed here: https://tourismnorthernontario.com/wp-content/uploads/2016/08/2014_northern_ontario_product_development_strategy.pdf



Changes to the U.S. exchange rate over the last several years as well as the implementation of extensive passport requirements has drastically changed the flow of American tourists in the region and has resulted in a decline in international drivers entering Northern Ontario at land border points from 2005-2011 in Sault Ste. Marie, Fort Frances, Pigeon River and Rainy River.

Further, surveys completed for the *Northern Ontario Multimodal Transportation Strategy*⁴ indicate that **22%** of summer traffic and **33%** of fall traffic are "pass-through". It also highlights the need for non-experience related work in the region including the investment into new and improved rest stops, the addition of more passing lanes or four lanes on key roads and improved signage and wayfinding.

Supporting the notion of infrastructure needs for tourists in Northern Ontario, in 2014 TNO undertook a wayfinding strategy which provides several recommendations to enhance wayfinding for visitors to the region. The report highlighted the importance of Visitor Information Centres (VICS) in the wayfinding process and, as such, was the catalyst for the recently-completed Northern Ontario Visitor Information Centre Strategy which outlines a work plan and steps to equip the north's VICS with the tools and resources they require to best address visitor needs.

A focus group session was held in 2015 to undertake a Northern Ontario Auto & RV Touring SWOTT and offer additional information ([see Appendix I](#)). For more information on the Auto & RV Touring Product Development Committee, its role and purpose, please see [Appendix II](#).

⁴ Ministry of Transportation Ontario and Ministry of Northern Development and Mines – Northern Multimodal Transportation Strategy: Tourism



The Case for Auto & RV Touring Product Development in Northern Ontario

Several factors make Auto & RV touring a key product for further development in Northern Ontario:

- The Northern Ontario Product Development Strategy lists Auto & RV Touring as a primary area of focus for product development.
- Direct alignment with the 2017 – 2020 marketing strategy which includes touring as a priority area for marketing resources.
- Touring routes currently in-market have followed best practices methodology that can be used as a template or format for future touring route developments.
- Provincial OTMPC support of the motorsports program and the Group of Seven initiative provides additional resources to align with for the purposes of marketing touring route programs once they have been developed and are ready for market.
- The National Byways program statistics show the large economic impact that can be created by touring route development.

3.0» The Case for Auto & RV Touring Product Development in Northern Ontario



Auto & RV Touring Product Development Work Plan for Northern Ontario

There are several steps that can be undertaken to further develop Auto & RV touring in Northern Ontario.

7 Steps to Further Develop Auto & RV Tourism in Northern Ontario:





STEP 1: Consider Current Key Touring Route Needs

J **Timeline:** Short term

The Northern Ontario Product Development Strategy indicates that touring route developments should focus on routes that have the most opportunity to appeal to new and growth in markets and it specifically targets the Thunder Bay to Sault Ste. Marie route along the Lake Superior shoreline and the northern Georgian Bay area to capitalize on their natural scenic beauty. Each of the following routes have been under development or in market for several years and each could benefit from further development to make them even more enticing for the consumer.

a **Lake Superior Circle Tour**

The Lake Superior Circle Tour, through the Ride Lake Superior program, has become an epic motorcycle route that has been attracting multitudes of riders for a number of years. Supported by criteria for operator market-readiness, a route planning website and a marketing budget, the process used to develop Ride Lake Superior is a model for further touring route development in Northern Ontario.

The scenic quality of this route, not only from Thunder Bay to Sault Ste. Marie but in many areas around the entire loop, make it a natural target for expansion of the current motorcycle route into an Auto & RV touring

route. The Lake Superior Circle Tour has been around for many years, but is in need of further product development to make it a best-in-class and market-ready for the Auto & RV driving tour market.

To start the process, a work plan is needed, and should outline the product development steps required to expand this route into a "must do" Auto & RV touring route. In developing the workplan, partner opportunities around Lake Superior should be taken into consideration as well as target markets and market-readiness criteria to ensure that the route is the best that it can be.

b Group of Seven Touring Route Development

Cultural tourism has been in the forefront with the Group of Seven tourism development in Northern Ontario. A master plan and foundation report provided the strategic background for this development which has been followed up by branding, interpretive installations and a marketing plan for the experience. Recent developments have seen the creation of a Group of Seven touring route in the Algoma/north shore of Lake Superior region. The route guides art enthusiasts to key locations with significance to the Group of Seven. This touring route format is now being adopted by the OTMPC for implementation on a provincial level, including the development of a Northeastern Ontario tour. There are several opportunities to further support these touring route developments with the purpose of elevating the experience for the tourist.

Further Product Development of Sites –

In developing the routes, it became apparent that, in some cases, product exists that would be ideal for the experience but are not currently ready for tourists. Other experiences were included but could be even better with a few simple changes. To solve this issue, criteria for assessment of the product that is on the routes is needed, to ensure experiences being marketed are ready to accept these niche visitors and to give operators/sites a list of changes that they can make to ensure they are market-ready.

Development of Experiences – Foundational research supporting the Group of Seven tourism development in Northern Ontario documents several painting sites that are currently inaccessible to the general travelling public. The opportunity may exist to develop tours to one or more of these sites for active, adventurous travellers. For example, in the La Cloche area, many of the painting sites are only accessible through a combination of canoeing and hiking. Development of guided tours to one or more of the publicly-accessible sites could represent an opportunity for an adventure operator.

Interpretive Installations – Interpretive installations represent an opportunity to tell a story and engage a consumer at a site that might otherwise not be staffed. Interpretive sculpture installations have already been undertaken at several sites in Algoma and along the north shore of Lake Superior. The opportunity exists to install additional structures at other key Group of Seven sites in this region, and to expand this program to Northeastern Ontario and possibly province-wide.

Group of Seven Training – Group of Seven training programs have been developed and were delivered in the Algoma region in 2015. These educational tools are designed to ensure that tourism front-line staff are knowledgeable of the Group of Seven and their influence in the region and can discuss the topic with tourists. Provision of more training sessions across Northern Ontario (and potentially throughout the province), especially for front line staff of operators/sites on the Group of Seven touring routes would amp the experience for tourists travelling these routes.

Touring Route Web Presence – Group of Seven tourism opportunities are beginning to develop across the province. The consumer would benefit from a website that would support trip planning before arrival.



c Georgian Bay Coastal Route

Striving to create an iconic touring route, the Georgian Bay Destination Development Partnership has worked together for the last 10 years. The product development work it has previously completed has led to the development of 11 themed touring routes around the bay, supported by qualifying criteria to ensure activities and operators listed are best in class. The Georgian Bay Destination Development Business Model and Three-Year Strategy, undertaken by the group in 2015, outlines a new business model, built upon partnerships that leverage the financial commitment of regional, municipal and key stakeholders around the bay. As the group embarks on creating a business plan to reinvigorate their operations, it is conceivable that the inclusion of the Regional Tourism Organizations in Coastal Route product development and marketing will be paramount.

Northern Ontario Auto & RV Touring Product Development Committee Role:

- Support product development initiatives to do with current touring routes' further development.

d Temiskaming Tour

An initiative that is a partnership between municipalities in Northern Ontario and Quebec, the Temiskaming Tour is in-market during the summer of 2017 with a passport program designed to promote sites, attractions and events around the lake.

To support the further development of this Auto & RV tour, there may be opportunity to support route initiatives designed to increase the quality of the visitor experience. For example:

- Plans to upgrade the route's main attractions to improve the visitor experience;
- Development of route mapping on the tour website;
- Development of themed itineraries (which may include an opportunity to tie in with the Group of Seven developments/opportunities in the region);
- Signage of the route; and
- Operator participation in the TEN program to increase the quality of the services offered along the route.



STEP 2: Establish Criteria for Additional Northern Ontario Routes to be Developed

Many tourist areas develop touring routes following their backroads or coastal routes, through their forests and along a path leading to their attractions and themed stops. But what makes a touring route truly stand out? What needs to be on the route in order to attract tourists from further distances and become top of mind for the ideal travellers' bucket lists?

The Northern Ontario Product Development Strategy indicates that touring route developments should focus on routes that have the most opportunity to appeal to new and growth markets. Research and corresponding criteria should be used to choose routes for development that have the most potential as tourist attractions capable of enticing long-haul or international tourists.

Timeline: Medium term

For example, the U.S. Scenic Byways Program supports touring routes that have a scenic, archeological, natural, historic, cultural or recreational significance. In addition to these criteria, touring routes need good roads, roadside stops and washroom facilities, scenic lookouts and/or attractions and communities and amenities with the ability to support tourist's needs.

Placing time and energy on developing routes with bucket list potential will have spin-off effects for the communities and operators that support these routes and will ultimately ensure that TNO's best driving routes are 'on the map' of potential travellers.

Northern Ontario Auto & RV Touring Product Development Committee Role:

- Provide input and feedback to the proponent undertaking the criteria development





STEP 3: **TEN Program Tools for Encouraging Quality Shifts**

To make the Northern Ontario touring route experiences exceptional, tourism assets that support the routes being developed should be of high quality and market-ready establishments. Encouraging supporting operators to take part in the Tourism Excellence North (TEN) self-assessment, Fast Track to Success and/or Group Learning program tools will help to ensure the operators are focused on the quality of their establishment and providing the best possible experience to travellers.

J **Timeline:** Medium to Long term

Northern Ontario Auto & RV Touring Product Development Committee Role:

- Communicate endorsement and championing of benefits of TEN to operators





STEP 4: Marketing Tasks Undertaken

As product development is completed for each route, the experience can be marketed. Collateral such as photography, videos, map(s) and a mobile-friendly website with trip planning may be needed.

A marketing plan for each route should outline the tactics to be used to push the experience to the target market consumers. Care should be given to ensure tactics align with provincial touring route tactics and leverage any available provincial support.

Timeline: Long term

Northern Ontario Auto & RV Touring Product Development Committee Role:

- Where needed, provide support for marketing tactics undertaken by TNO, sub-region or DMO.
- Where needed, support TNO in decisions surrounding touring route marketing funds
- Advocate for the inclusion of Northern Ontario touring routes to be included in provincial marketing initiatives where applicable





STEP 5: National Byways Program

Once development has been undertaken for at least one key touring route and marketing activities have begun, begin to investigate the opportunity to advocate for the creation of a federal program to support touring routes, similar to the National Scenic Byways program in the United States.

The U.S. National Scenic Byways program supports routes that are deemed to be of archaeological, cultural, historic, natural, recreational or scenic with funding. Further qualification of key routes designates them as All-American Roads. These routes have the most tourism power, include features that are not found anywhere else in the U.S. and meet at least two of qualities listed above to receive their designation. Each Scenic Byway and All-American Road is selected through a nomination procedure and must develop a corridor management plan.

Timeline: Long term

Discussions should begin by engaging tourism representatives from other key Canadian touring routes along with national and provincial transportation and tourism representatives. The anticipated program could look to provide infrastructure, development and marketing funding support for iconic touring routes in Canada that meet established criteria and have the ability to act as the key trip motivator to attract long-haul travellers. The program details could align with the Destination Canada Signature Experiences program, expanded to apply to touring routes. Participants should include federal transportation authorities.

Northern Ontario Auto & RV Touring Product Development Committee Role:

- Consider committee chair attending conference calls with TNO executive representative





STEP 6: Advocate for Supporting Infrastructure

In line with the outcomes that could be supported with a National Byways like program, ongoing advocacy for supporting infrastructure is needed to ensure that the roads, visitor centers, roadside rest stops and washroom facilities as well as improved cellular service are available.

📅 **Timeline:** Ongoing

Northern Ontario Auto & RV Touring Product Development Committee Role:

- Work with TNO on advocacy initiatives where support is needed.





STEP 7: Trans-Canada Campaign

Research shows that most vehicular traffic to Northern Ontario is flow-through with **22%** of summer traffic and **33%** of fall traffic simply driving by without stopping. A huge opportunity exists along the Trans-Canada Highway to capitalize on the flow through traffic by enticing them to stop and experience a tourist activity, attraction or scenic lookout along the route. Getting the pass-through market to stop will put dollars directly into the pockets of Northern Ontario operators. A marketing campaign should be developed with the purpose of targeting these travellers and getting them to stop at least once during their journey. In line with Canada's 150th birthday and celebrations surrounding the Trans Canada Trail taking place during the summer of 2017, perhaps an opportunity exists to revitalize the Trans-Canada Highway journey

└ Timeline: Short term

Northern Ontario Auto & RV Touring Product Development Committee Role:

- Provide input into campaign development.

APPENDIX I:

SWOTT Analysis

During the Northern Ontario Tourism Summit held in Sault Ste. Marie in November 2015, an Auto & RV touring focus group session was held with 13 participants in attendance. Their input regarding questions posed about trends and opportunities was as follows:

What is the single biggest shift you are seeing?

- Catering to high-end RV markets like the U.S.
- Bigger RV units, disappearance of tent trailers
- High-end family RV travel
- “Glamping”, the combination of glamour and camping, a style of camping with amenities, resort-like service, not usually associated with traditional camping.
- Growth of hard tops expanding the season at parks
- Lack of private campground campsites in Ontario
- 50 to 100 amp services, more amenities and activities
- 14% of households own RVs
- Sell 40,000 units/year for last 20+ years
- Aging population wants convenience
- Need trip planning tools
- Shift to destination-bound rather than touring as they go to events such as food fairs, fiddle contests, lumberjack festivals etc.
- Caravans by brand – creates instant villages, these are joiners
- Selling houses – full-timers stay in RV over 20-year life span
- Can reach through dealers; join their associations
- Auto touring is happening around Lake Superior through Northern Ontario

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

- High-end experiences
- Designate/work with caravan leaders who structure the entire trip with 25 to 40 participants
- RVs: link to certain event; theme it
 - » Host RV-friendly events
 - » Loop – Blueberry festival to bluegrass concert
 - » Group of Seven, three-day/seven-day RV tour
- Seven to 10 days:
 - » "Blues and brews" tour
 - » Connect extreme adventure sites
 - » Motor coach bus tour around Lake Superior to include events

+ STRENGTHS

- + The Lake Superior Circle Tour is a well-established bi-national route that puts Northern Ontario on 'must do' travel lists.
- + Small towns and rural areas combined with scenic stops, roadside attractions and scenic drives contribute to tourism product within Northern Ontario by acting as the host and conduit for touring routes.
- + Built roadside attractions such as the Wawa Goose, the Loon Dollar monument, Terry Fox Monument, The Big Nickel, Winnie the Pooh, Manitou (the bison), Husky the Musky and many more provide a reason to stop across Northern Ontario.
- + Algoma presents four driving routes in the region that include the Grand Algoma Drive, Wawa North Drive, Deer Trail Drive and Island North Drive.
- + The Georgian Bay Coastal Route, connecting southern Georgian Bay with northern Georgian Bay, provides RV-friendly options as well as interest-specific touring options such as lighthouses and marine heritage.
- + Highway 17 between Sault Ste. Marie and Nipigon and Highway 61 between Thunder Bay and Pigeon River are notable as 'scenic highway tours'.
- + The recently-released Georgian Bay International Travel Trade Strategy undertaken by the Georgian Bay Destination Development Partnership examined the international market for Georgian Bay product and the market-readiness of operators around the Bay.
- + Group of Seven product development is currently in process in 13a & b. 13b has begun to examine opportunities to establish a Group of Seven touring product.
- + Efforts have begun to develop an itinerary-backed touring route that follows Highway 11/17 from Algonquin to the Agawa Canyon.





— WEAKNESSES

- There are two levels of assessment for the Auto & RV sector – roads and related infrastructure and the experience and routes. Tourism-specific infrastructure-related needs relevant to Auto & RV have been identified in the Ministry of Transportation Ontario and Ministry of Northern Development and Mines – Northern Multimodal Transportation Strategy report as follows:
 - » Investment into new and improved rest stops;
 - » Addition of more passing lanes and/or four-laning on key roads; and
 - » Improved signage and wayfinding tools.
- There are many great examples of ‘how to do it right’ to appeal to and serve the touring market, but there are stretches of highway across Northern Ontario with limited services and amenities of quality (restaurants, gas stations, accommodation, retail) that reflects badly on the industry as a whole and that do not present a particularly pleasant experience that supports repeat visitation or recommending to others.
- While individual communities recognize and pursue the touring market, there is currently little attention paid to the Auto & RV Touring market in a coordinated manner both from product and marketing perspectives.
- There is need for RV rental facilities throughout Northern Ontario. For example, there are none in Thunder Bay.
- The high/volatile price of fuel in Northern Ontario. The price can drastically change from one year to the next.
- Higher costs of campgrounds facilities (both provincially and federally vs. United States comparable facilities).
- Confusing and outdated touring routes such as the ‘MOM’ route (Manitoba, Ontario, Minnesota).



OPPORTUNITIES

- Endorsement and formal support for implementation of tourism-related needs as identified in the Northern Multimodal Transportation Strategy will enhance the overall offer.
.....
- Today's increasingly sophisticated and demanding RV markets are looking for the following facilities and services as they travel:
 - » Nearby gas stations and RV maintenance services;
 - » Access to dumping stations or an area designated and approved for emptying gray and black water holding tanks;
 - » Stores nearby with easy maneuverability;
 - » A range of communication options including telephone connections, wireless high speed internet connections or kiosks and satellite phone service for areas not covered by cell phone;
 - » Flat campsites with sufficient space for maneuvering (minimum swing radius of 50 feet for oversize RVs);
 - » 30-amp service is considered a minimum and some units require 50 amps;
 - » Pull-through campsites for larger motor homes;
- There is now a national rating program administered by Camping Select (www.campingselect.ca).
.....
- The Chi-Cheemaun ferry, with daily seasonal passage between Tobermory and South Baymouth acts as not only a vehicle for passage between the south and the north, but can also contribute to touring traffic to Manitoulin Island and Northern Ontario.
.....
- Potential for a variety of circle tours originating from the fork at Hwy. 11/400 Barrie, connecting to the vast GTA market and overseas RVers from Toronto Pearson Airport.
.....
- Touring by car on fly/drive vacations is an activity that appeals to repeat long-haul visitors to Canada.
.....
- Bring back cachet of 'iconic road trips' to generate new visits and to capture more of the pass-through market.
- Elevate the 'Trans-Canada' touring opportunity across Northern Ontario by creating itineraries, connecting communities and highlighting stops that reflect the 'cadence of travel' (short stop, two-hour stop, half-day stop, overnight stop, more than one night stop, etc.) by mode of transportation. Leverage the number of built roadside attractions as one element of the touring product.
.....
- Position and develop road trip itineraries across certain regions of Northern Ontario as a way to introduce resident immigrant families and their VFR from overseas, as well as overseas travellers, to a range of Canadian experiences.
.....
- Develop itineraries that appeal to overseas visitors to Canada seeking fly/drive experiences.
.....
- The Auto & RV touring markets are important to generating economic activity to the many communities along major highway corridors in particular.



THREATS

- The federally-supported Scenic Byway program in the U.S. has resulted in well designed and signed routes. When U.S. travellers cross the border the quality of the experience can be substantially different.
- Western Canada is a well-established RV destination.
- The Alaska Highway, Klondike Trail, Icefields Parkway (Banff-Jasper corridor), the Cabot Trail and others are on many touring 'bucket lists'.
- Lack of campsites in Ontario – private campgrounds.

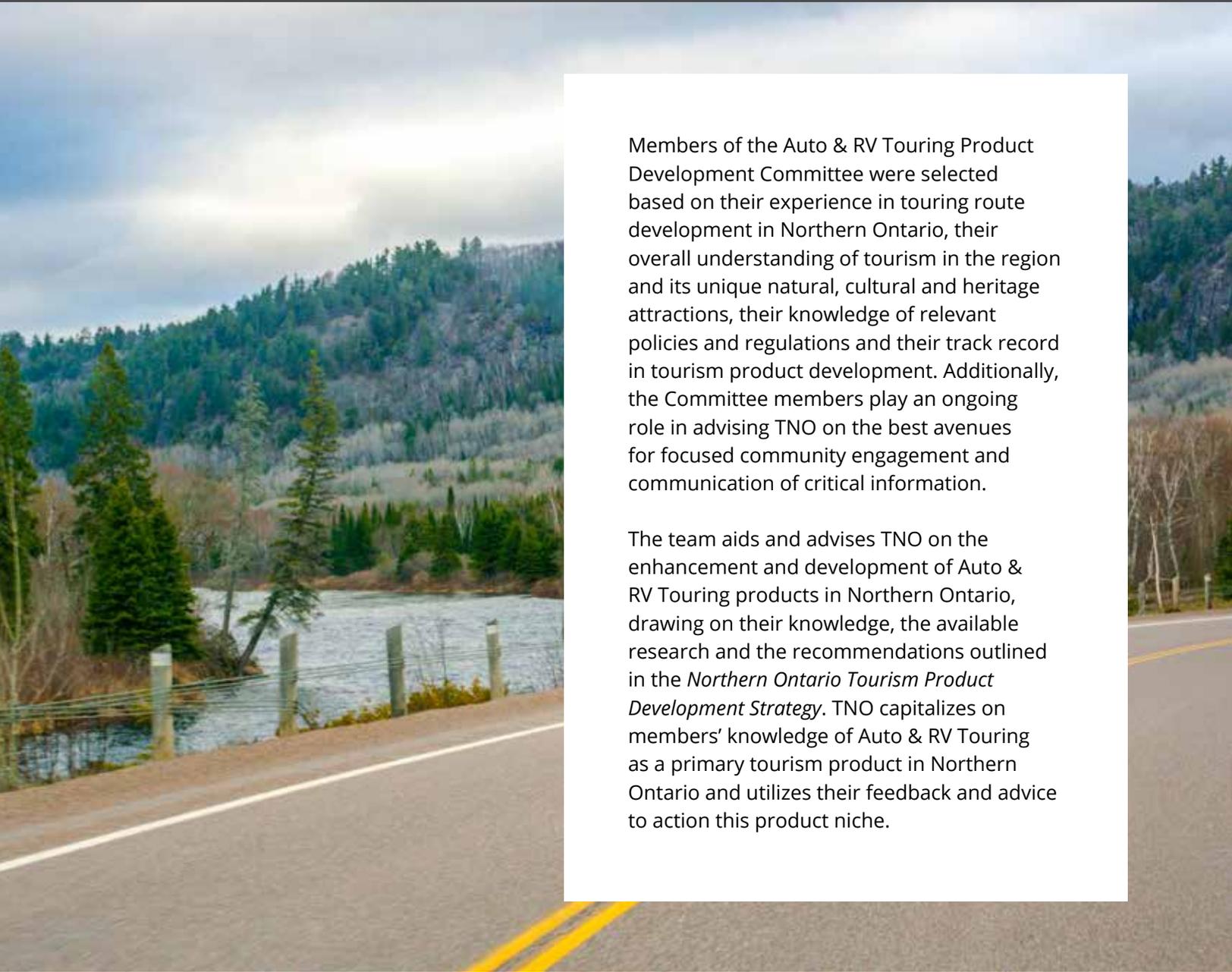


TRENDS

- Bigger, high-end units.
- 14% of households own RVs.
- Shift to destination/events bound rather than touring as they go to - events such as food fair, fiddle contest, lumberjack festival.
- Auto touring – Lake Superior Circle Tour.

APPENDIX II:

Purpose of the Auto & RV Touring Product Development Committee



Members of the Auto & RV Touring Product Development Committee were selected based on their experience in touring route development in Northern Ontario, their overall understanding of tourism in the region and its unique natural, cultural and heritage attractions, their knowledge of relevant policies and regulations and their track record in tourism product development. Additionally, the Committee members play an ongoing role in advising TNO on the best avenues for focused community engagement and communication of critical information.

The team aids and advises TNO on the enhancement and development of Auto & RV Touring products in Northern Ontario, drawing on their knowledge, the available research and the recommendations outlined in the *Northern Ontario Tourism Product Development Strategy*. TNO capitalizes on members' knowledge of Auto & RV Touring as a primary tourism product in Northern Ontario and utilizes their feedback and advice to action this product niche.

Role of the Auto & RV Touring Product Development Committee:

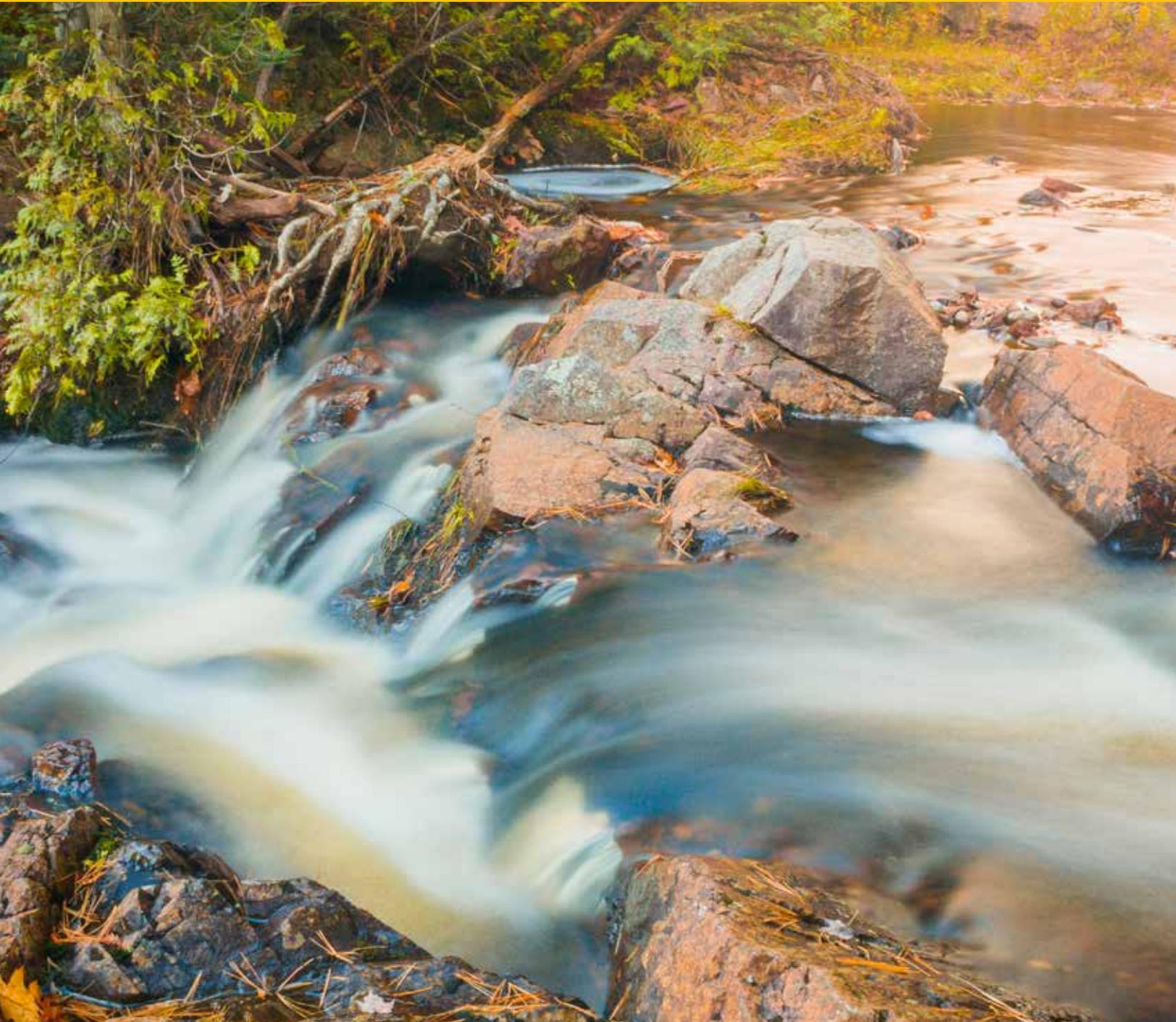
Team members use their wisdom, coupled with research, to support work undertaken by TNO with the purpose of attracting more Auto & RV Touring visitors to Northern Ontario with the main objectives of offering a world-class experience, resulting in tourists staying longer and spending more money.

They will also encourage activities that support the development of Auto & RV Touring products that are complimentary and coordinate well with other product niches in a sustainable way.



Auto & RV Touring Product Development Committee Members

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Pierre Belanger	Ontario RV Association	705-648-3267	pierrelbelanger@outlook.com



RESOURCES:

Cabot Trail, Cape Breton, Nova Scotia – <http://www.cabottrail.travel>

Ministry of Transportation Ontario and Ministry of Northern Development and Mines – Northern Multimodal Transportation Strategy: Tourism – https://northernontariommts.files.wordpress.com/2016/11/ttr_tourismbackgrounder_draft_2016-11-04.pdf

Ontario Tourism Marketing Partnerships Corporation Go Tour Ontario program:
<http://www.gotourontario.ca>

Pacific Coast Highway – <http://www.usatoday.com/story/travel/destinations/10greatplaces/2014/06/05/best-us-road-trips/9958951/>

Recreation Vehicle Industry Association – <http://www.rvia.org>

Route 66 – <https://roadtripusa.com/route-66/>

The Motorcycle/RV Route Development Manual: A Guide for Developing Tourism Routes for Motorcycles and RVs in Northern Ontario – <http://lanarkcountytourism.com/files/2012/11/OHTO-Motorcycle-and-RV-Route-Development-Manual.pdf>

Tourism Northern Ontario – Northern Ontario Product Development Strategy
https://tourismnorthernontario.com/wp-content/uploads/2016/08/2014_northern_ontario_product_development_strategy.pdf

Understanding and Attracting the RV Tourism Market in Northern Ontario – For more information: <http://tourismco.com>

USA Today, 10 Best Bucket List Road Trips, June 13, 2014.
<http://www.usatoday.com/story/travel/destinations/10greatplaces/2014/06/05/best-us-road-trips/9958951/>

Visit Georgian Bay – Georgian Bay Coastal Route RV Tour
<http://www.visitgeorgianbay.com>



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