



DESTINATION
**NORTHERN
ONTARIO**

destinationnorthernontario.ca

NORTHERN ONTARIO'S TOURISM

Path to Prosperity

A COVID-19 RESPONSE PLAN





NORTHERN ONTARIO'S TOURISM

Path to Prosperity

A COVID-19 RESPONSE PLAN

CONTENTS

Executive Summary 03-06

Context..... 07

 Recovery for operators and communities..... 09

 The impacts of Covid-19 10-14

 Solutions for Moving Forward to Recovery 15-16

Northern Ontario Tourism Path to Prosperity..... 17-21

Action Plan 22

 Product Development..... 21-26

 Investment Attraction 27-29

 Workforce Development & Industry Training..... 30-33

 Marketing..... 34-37

 Action Plan..... 38-39

Appendix 40-42

Executive Summary

The tourism industry around the world has been hard hit by COVID-19 and while there are glimmers of hope, recovery and innovation in Northern Ontario the pandemic is expected to have an impact on the tourism sector into the 2021 peak, summer season and beyond. A shared action plan to 'future-proof' businesses and communities to be stronger in the future is needed. Northern Ontario's *Path to Prosperity* is the means to do that.

The ultimate focus and goal of this Plan is to:

1. **Build on** and nurture the momentum, initiative and innovation of the tourism industry across Northern Ontario to date; and
2. **Identify** and build action plans to address longer-term pan-Northern Ontario opportunities and challenges for the tourism sector that need attention, created as a direct result of COVID-19 to position the industry for long term success.

The ability of the many tourism businesses, communities and organizations across Northern Ontario to adapt and respond to COVID-19 has differed, based on each unique profile, market and financial capacity and has been uneven to date. While there are many bright spots and successes, some challenges remain.

Solutions for moving forward to recovery include:

1. **Borders open** to U.S. and long-haul visitors.
2. **Clear** and **timely** updates, communications.
3. **Positive** and **open** consumer, business and community mindsets.
4. **Multi-year financial support** for industry organizations that rely on industry memberships
5. **Establishment** of Northern Ontario Tourism Act to provide stability and long-term investment.

Northern Ontario's Tourism Path to Prosperity

GUIDING PRINCIPLES

Path to Prosperity will:

1. **Remain** nimble, responsive and flexible to the changing operating environment.
2. **Continue** to leverage partnerships and collaboration with regional, provincial and national tourism partners to deliver a plan that reflects the unique needs of the tourism sector across Northern Ontario.
3. **Leverage** and build cross-sector cooperation and investments.
4. **Facilitate** regular, timely, consistent communication with industry across all regions and sectors.
5. **Share** successes and wins.

Positioning the Industry for the Future

The core goal of this Plan is to position the industry for a viable and sustainable future. Four fundamental strategies to position the industry for the future are outlined below.

1. **Looking beyond** the immediate.
2. **Leveraging** new visitor patterns and interests.
3. **Adapting** to new business and operating realities.
4. **Keeping** an eye on global trends.

Key Priorities

Key shared priorities to position the industry for the future, build on momentum, boost recovery and support as many tourism operators across Northern Ontario as possible are addressed in this plan:

1. **A plan** for safe and timely re-opening of the border to U.S. travellers.
2. **Gathering** and **sharing** facts and insights on what travellers are seeking in the near-term and over the longer term.
3. **Adoption** and **roll-out** of World Travel and Tourism Commission's (WTTC) *Safe Travels Stamp* to position Northern Ontario communities, destinations and operations to travellers.
4. **Implementing** experience development, marketing and sales strategies in anticipation of closed U.S. and international borders into peak summer season of 2021:
 - a. *Identification of target market(s) and related, laser-focused and timely pan-Northern marketing and sales strategy to position fly-in and remote camps and lodges as a unique and desirable option to domestic residents for 2021.*
 - b. *A strategy and action plan to develop and showcase experiences to entice travel off of established travel corridors for the 2021 peak summer season.*
 - c. *A strategy and action plan to showcase experiences to generate inter-regional travel throughout the North.*
5. **A strategy to support** demand generators as they rebuild and rethink delivery models that include built attractions, festivals & events, sport tournaments, meetings.

An action plan to tackle these key priorities starts with addressing core challenges, followed by actions presented by DNO's core pillars.

CORE CHALLENGES

Solutions for Moving Forward to Recovery

1	Create Border Task Force
2	Continue to provide clear and timely communications
3	Shape consumer, business and community mindsets
4	Seek multi-year financial support for industry organizations that rely on industry memberships
5	Build support for establishment of Northern Ontario Tourism Act to provide stability, long-term investment

Product Development

1	Review Tourism Product Development Strategy and Plans through the lens of COVID-19 to position Northern Ontario for the future
2	Complete timely research on resident intention to travel, interests and barriers, specific to Northern Ontario
3	Quickly reactivate and execute Northern Ontario product development initiatives that resonate with travellers as a direct result of COVID-19.
4	Prepare, distribute a database of ideas and inspiration
5	Facilitate creative thinking around a new genre of products, delivery models

Investment Attraction

1	Actively pursue financial resources to advance this plan
2	Complete research with the tourism industry across Northern Ontario to inform recovery plans
3	Continue to engage government partners in discussions and strategies to address long-standing issues.
4	Continue to explore options to address an immediate need for financial support for some businesses.
5	Work with the lending sector (commercial and government) to advocate for longer term financial support of hospitality sector, including a dedicated program for capital funding
6	Support investment into municipal infrastructure by linking tourism industry to opportunities through economic development and other municipal departments and agencies
7	Continue to share information on government programs that could assist private operators in developing their attractions and enhancing their consumer offerings.
8	Expand support and celebration of entrepreneurial ingenuity in the industry.
9	Pursue an expanded partnership with Ontario Tourism Innovation Lab and its Spark Program

Workforce Development & Industry Training

1	Facilitate adoption of international and sector-specific safety and health operating protocols by operators and communities
2	Review and revise as needed, current tools in support of experience, culture and quality shift priorities to reflect immediate COVID-specific needs of operators and communities. Partner and collaborate where necessary.
3	Continue to adapt , refine or source from third parties training and development tools to support the short-term needs and realities of the industry
4	Continually update the Business Reopening Toolkit for industry with highlights, interpretation and implications of global research
5	Adopt a partnership model of shared investments
6	Put strategies in place to minimize barriers to hi speed Internet

Marketing

1	Imbed safety and health messaging in pan-Northern tactics and activities
2	Review planned marketing investments to reflect shift in traveller interests and priorities
3	Plan for a strategy and related tactics to respond to closed U.S. and international borders in 2021
4	Facilitate the designation of select new visitor experiences as Ontario and Canadian Signature Experiences.
5	Work with partners to showcase Northern Ontario on national and international platforms
6	Continue investment in media FAMs and influencers

Context

The tourism industry around the world has been hard hit by COVID-19 and while there are glimmers of hope, recovery and innovation in Northern Ontario the pandemic is expected to have an impact on the tourism sector into the 2021 peak, summer season and beyond.

A shared action plan to 'future proof' businesses and communities to be stronger in the future is needed. Northern Ontario's Tourism *Path to Prosperity* is the means to do that.

This Plan builds on and compliments initiatives under way by Destination Northern Ontario (DNO) and its many partners, identifies gaps that need addressing and opportunities for industry to pursue. It outlines very practical, short term needs, while taking a longer view to drive this industry out the other side of the COVID-19 pandemic.

The ultimate focus and goal of this Plan is to:



Build on and nurture the momentum, initiative and innovation of the tourism industry across Northern Ontario to date.



Identify and build action plans to address longer-term pan-Northern Ontario opportunities and challenges for the tourism sector that need attention, created as a direct result of COVID-19 to position the industry for long term success.

Prepared in late September 2020, this Plan responds to ongoing discussions at the Northern Ontario COVID Task Force, input from a cross-section of industry leaders, operators, partners and stakeholders gathered by Destination Northern Ontario in early June 2020, industry surveys, regularly completed by the Tourism Industry Association of Ontario (TIAO) and Nature & Outdoor Tourism Ontario (NOTO) between March and late August 2020, as well as anecdotal insights that operators and other stakeholders continue to share. The Plan reflects the latest in national and global trends

as well as the most current information and updates from provincial and federal public health and government officials. Continuing announcements that most recently include an expansion of the federal Regional Relief and Recovery Fund, administered by FedNor and provincial assistance through the Northern Ontario Recovery Program administered by Northern Ontario Heritage Fund Corporation (NOHFC) are anticipated. This shifting landscape is expected to have an impact on short term priorities and needs identified, while the longer-term perspective is expected to remain intact.



It is estimated that 40% of all tourism businesses will be affected negatively, long-term, due to the crisis. An immediate need to shift marketing focus to the domestic market was quickly evident and other adaptations including product development and industry training will be needed for the long-term sustainability of the industry. Results from the Tourism Industry Association of Ontario Economic Impact surveys show that as of July 2020, nearly 55% of businesses are still temporarily closed, permanently closed or have limited hours/capacity due to the pandemic. This economic impact on the industry will require strong leadership from tourism organizations including Regional Tourism Organizations.

— Destination Northern Ontario Business Plan 2020-2021

The Destination Northern Ontario Board of Directors continues to monitor the impacts of the pandemic and the organization has been an active and engaged partner with tourism advocacy and marketing organizations addressing the impact of the pandemic since March 2020, bringing the voice and perspective of the issues and challenges facing the Northern Ontario tourism sector. Many provincial and federal initiatives, funding programs and supports that have been accessed by the tourism sector have played a big role in stabilizing the industry. DNO will continue to work with and leverage partnerships and investments with federal, provincial and sector stakeholders and partners on behalf of the industry at large.

DNO will gather and provide a Northern Ontario perspective and support for provincial-wide advocacy for support that, most recently includes:

1. **An economic stimulus** package of dedicated forgivable grants and loans for the next 12 to 18 months.
2. **A capital expenditure** program that businesses can apply to, to help meet the costs of PPE and physical distancing.
3. **Reduction** in permits and license costs, as well as tax credits for new costs associated with meeting new health and safety protocols.
4. **Targeted financial support** for attractions that have been unable to open even in Stage Three.
5. **A tax-based incentive** for Ontarians to rediscover the province and support local.

Flexibility to adapt actions to support key initiatives as they are rolled out will be crucial to effectively respond to a shifting environment. To that end, this document should be treated as a rolling action plan that is updated and adjusted as needed.

Recovery Will be Different for Each Operator and Community

Tourism across Northern Ontario is made up of many layers with broad and varied breadth, depth and reach. Entrepreneurs of all ages, staff and volunteers at public and private parks, attractions, art galleries, campgrounds, resorts, lodges, outposts, breweries, farms and restaurants are keen to emerge from COVID-19 in a good place. Each is passionate about sharing the natural resources, history, culture, arts and culinary delights with visitors near and far.

As highlighted in DNO's 2020-2021 Business Plan an estimated **40%** of the workforce in the region, as well as **one-in-five** businesses are tourism-related. In 2018, there were **9.2 million** visits to the North with tourism receipts totaling **\$1.6 billion**. This level of economic activity needs to be protected and supported for the future health of many communities and their residents.

Key features of this sector are outlined below and detailed in the Appendix:

- **Tourism across Northern Ontario is multi-layered and complex.**
- **The tourism sector in Northern Ontario is dependent upon decisions made by government agencies at all levels that impact ability to operate and how to operate**
- **Direct and indirect economic activity of the tourism industry is far-reaching**
- **There are many nuances and differences across the tourism industry in Northern Ontario:**

 - Origin of visitors and geographic context differs
 - Seasonality of operation impacts opportunities and windows to generate business
 - Operational profile, ownership and management impact flexibility, capacity to adapt, invest, scalability
 - Product and experience focus and diversity shapes options
 - The nature of each operation dictates the need and access to financing for capital investments, upgrades to furniture, fixtures and equipment (FF&E), recruiting, training
 - The role and reach of tourism sector in each community and destination varies.

This Plan has been created to reflect this unique industry.

The Impact of COVID-19 is Deep and Far-Reaching

The ability of the many tourism businesses, communities and organizations across Northern Ontario to adapt and respond to COVID-19 has differed, based on each unique profile, market and financial capacity as noted above and has been uneven to date. While there are many bright spots and successes, some challenges remain.

As the peak summer months of June, July and August 2020 come to a close, a number of new visitor patterns and interests have emerged that include:

- **Parks and waterways** busy, some oversubscribed.
- **Campgrounds** full.
- **Marinas** busy.
- **Operations** of all types along or near established, mainstream travel corridors that include Highways 17 and 11 benefitting from strong demand, new guests. Operations off main corridors, in remote locations or a great distance from major urban markets are typically struggling.
- **Communities** and their economies suffering due to loss of festivals, meetings, conferences, sporting events.
- **Spikes in participation**, equipment rental and sales for canoeing, kayaking, cycling, hiking, RVing, camping, motorized recreational vehicles.
- **High yield, remote access and fly-in fishing lodges and camps** under significant pressure, many with little to no business in 2020 due to border closures. With many relying on reservations that got transferred from the 2020 season to 2021, an open border is by no means a sure thing. Open borders are a top priority for Northern Ontario as a whole and are critical to resource-based operators in Northwestern Ontario in particular, whose market is 80%- 95% U.S. guests. This reality needs attention and a plan to address.

The 2020-2021 winter season will likely follow the same patterns, with healthy demand along established corridors and in activities that are traditional and/or easily accessible such as snowshoeing. Ontario Federation of Snowmobile Clubs (OFSC) is anticipating strong demand for Ontario snowmobile trails this winter, given the strong sales of motorized recreational vehicles.



Key Hotel Sector Indicators:

- While down considerably over 2019, Northern Ontario leads the province in hotel occupancy.
In July 2020 the average occupancy was 46% (-22% over 2019):
 - a. Northeastern, **45%** (-31% 2019)
 - b. North Central **57%** (-25% 2019)
 - c. Northwestern **32%** (-45% over 2019).
- Average daily room rates across the three Northern regions **dropped 9-11%** compared to 30% provincially.
- **Revenue** per available room (REVPAR) was **down an average of 40%** compared to 74% across the province.

Source: CBRE Hotels' Q3 2020 Update: The Ongoing Impacts of COVID-19



A COVID SEASON IN REVIEW

Coney Island 12th 'Maybe Annual' Music Festival

LOCATION: Coney Island, Lake of the Woods, Kenora

DATE: Sunday July 26, 2020

This one-day music event hosted on Coney Island on the northern most channel of Lake of the Woods, does not typically charge admission, relying on local patrons, businesses and supporters to fund the annual (maybe annual) event.

In 2020 with COVID-19, we were advised by our primary sponsor, The Standard Insurance and Wawanesa Insurance, that they were going to be continuing their support, if we were able to stage the event – even if that meant a modified format. That funding of \$5,000 was critical to the co-founders deciding whether or not to pursue the event. The event had also applied to the Kenora and Lake of the Woods Regional Community Foundation and were successful in being granted \$4,200. So – in essence – we had the funding to run the 12th event, without having to worry about the burden of raising more funds from local businesses and patrons. This would normally account for an additional \$2,500-\$3,500. This year donations during the festival netted us \$350.

Festival organizers consulted with the local OPP, Health Unit, City officials and MPP Greg Rickford's office to ensure compliance with local health standards and safety procedures.

In accordance with appropriate hand washing, sanitizing and distancing – the co-founders decided to stage the event on a private dock facing the bay on Coney Island. The audience would be “in boats” or their own personal pleasure craft, following limitations to ten people congregating. We also accommodated for other cottagers adjacent to the private dock, allowing use of their personal docks to host members of their families and friends on their properties, again, following gathering limitations. We hired an OPP “paid duty” to control access to the private properties where the stage was located.

The sound technicians and set up crew worked with masks on to set up the stage and sound. All talent was shuttled to and from the island in shifts of no more than ten people aboard the shuttle. We provided ConeyMusicFest masks to all volunteers, sound techs and performers.

The event played live to the water from noon to 5pm. There were five acts. We also broadcast LIVE on Facebook – along with ongoing posts to Instagram and Twitter profiles for ConeyMusicFest. We also posted to the Festivals and Events Ontario Instagram throughout the event. A drone pilot captured moments of the festival and integrated coverage into our posts on social media.

Advertising for the event was undertaken with both local radio stations and well as the weekly newspaper. We also pre-promoted across ConeyFest social assets.

We estimated up to 700 people enjoyed the performances throughout the afternoon, with others tuning in LIVE on Facebook, and following updates on Twitter and Instagram throughout the day.

— **Ferg Devins, Co-Founder Coney Island Music Festival**

A COVID SEASON IN REVIEW

Algoma Country

Algoma Country, a region that typically attracts significant traffic from the U.S. (from 90 – 100% for some operators) adjusted their planned summer and fall marketing campaign to focus on hyper-local, regional, and southern Ontario with a goal to drive bookings and build brand awareness.

Highlights and observations from summer and fall campaigns include:

- **Bookings:** \$256,130 up 32% from \$192,785 (Algoma Country) and \$373,740 up 67% from \$222,476 (total 13 A, B, C)
- **Web traffic:** up 115% from 108,823 to 234,993
- **Social traffic:** 40,750 engagements up 39% from 29,294; Algoma's Facebook and Instagram did exceptionally well with an increase in the use of hashtag #algomacountry and tagging Algoma Country in posts.
- The region's campgrounds, both private and in provincial parks, were inundated with campers.
- There was a rise in a younger demographic, which is not Algoma's traditional target market.
- Motorcycle enthusiasts were traveling the roadways this summer, looking to get away and enjoy the open road.

Other tactics included a small awareness campaign to ensure Algoma is top of mind in traditional U.S. markets, using #DreamON and a domestic summer/fall Moments of Algoma campaign that aligned with Destination Ontario's Group of Seven Continues fall campaign to celebrate the 100th anniversary of the Group of Seven's first exhibition. This campaign did exceptionally well and exceeded expectations.

The hardest hit sectors of tourism in Algoma Country are remote-based tourism, especially the fly-in and train-in businesses. Drive-in businesses fared better, but it was by no means an easy summer. These markets are imperative to the survival of our tourism businesses as we move into recovery stages. There is concern around winter product as well.

Looking to the future, surveys on travel intentions and data from current campaigns will be used to refine winter marketing campaigns in Q4. Future plans will incorporate safe travels messaging into digital and print media to assist in rebuilding consumer confidence in travel.

— **Heather Bot**, Executive Director, Algoma Country



A COVID SEASON IN REVIEW

Birchland Cottages

LOCATION: Iron Bridge, Ontario, Algoma Country

The year 2020 has certainly been a roller coaster of hurdles, unlike any other year we have seen in our fifteen years in business.

With Covid-19 starting early in the year, we suspected and planned that we would complete some large upgrades. And as we surmised, we would not be allowed to open and likely lose the season. These upgrades started taking place early in the spring and continued until we were told on a Friday afternoon we could be open on Saturday. Our first set of hurdles. Would we be able to be compliant? Some planning and preparations had been done but was it enough? Clients were calling, begging for cottages, saying 'we do not care we just want to get up north'. So, with some explanations to our customers that the grounds were a disaster and work would need to proceed we opened.

The grounds were almost full. Heavy equipment working daily and people surprisingly happy. Happy to be out in the great outdoors in Northern Ontario. With the area we have, social distancing was not hard, but getting cottages cleaned in time and safely for the next groups presented some challenges. Still with little information available about proper cleaning and Covid-19 measures we decided on fogging all cottages with disinfectant. The next hurdle was getting products and equipment for disinfection. We had to rush orders out of Europe as there was nothing available in Ontario. Our clients commented on how clean everything was and how great everything smelled. It would appear we climbed another mountain.

Our American clients were not impressed that they could not come up. Try explaining that we could not host the weddings or guarantee anything to an anxious bride was really the icing on the wedding cake.

All and all we consider the summer of 2020 very successful. We lost the first 7 weeks of the season. We lost all our American customers for the season. However, we still finished the year just under 10% of last year's total. Surely, had we had more cottages available we would have done much better, as we turned many families away due to a lack of availability. We completed a tremendous amount of work around the grounds and everyone was able to see the work and effort it takes to make things beautiful and functional. This last statement is very important. We had major work going on and our Canadian clients were very caring and understanding.

Birchland Cottages was extremely lucky to be a drive-to destination in Algoma where our Covid-19 numbers were low and people felt safe. This provided the backdrop to save what would have been our worst year since we purchased the property.

— Mark Graves, Birchland Cottages

Solutions for Moving Forward to Recovery

Path to Prosperity outlines and addresses a number of challenges that provide important context as the plan for recovery matures and shifts with implementation. Some challenges such as borders open to U.S. visitors are immediate. Other challenges are long-standing and with attention can play a strong role in post-COVID recovery and beyond.

➤ Borders Open to U.S. and Long-Haul Visitors

Visitors from the United States make up over 80% of guests at many remote camps and lodges. Their very livelihood depends on open borders in 2021. The development of a safe border re-opening plan that welcomes U.S. visitors in particular as well as long-haul domestic and international visitors remains a top priority. Ideally the safe border re-opening plan will provide reasonable lead time so that operators and destinations can plan accordingly.

- **DNO** will take the lead to immediately form a 'Border Task Force' that includes operators and industry associations, to examine border issues, share the devastating impact of closed borders on the resource-based sector in particular, and to provide solutions and advice to decision-makers

➤ Clear and Timely Updates, Communications

Shifts in understanding COVID and how to mitigate its impact continue. As a result, recovery plans, support programs and health and safety protocols also change.

- **DNO** will continue to provide clear and concise communications in a timely manner to the industry, working closely with partners to reach their networks.

➤ Positive and Open Consumer, Business and Community Mindsets

- **Keeping the spirits of tourism sector up** and looking forward with hope and the desire to restructure thinking and/or businesses as needed.
- **Countering negative consumer perceptions** and building consumer confidence:

for the cruise industry – negative impressions caused by the large ocean-going vessels where the pandemic had a presence

how to support events and built attractions as they adjust their offer

a general fear of travel and how to travel safely.

- **Responding to new consumer expectations** for health and safety protocols.
- **Nurturing informed and welcoming communities.**

➤ **Multi-year Financial Support for Industry Organizations that Rely on Industry Memberships.**

Recovery efforts need stable and strong industry organizations to partner with, and to act as communications and implementation channels to industry and in turn to their customers and visitors. Many of their members may not be in a financial position to pay annual fees or participate in advertising or partnered marketing opportunities. In turn, there may be fewer resources and access to investment to implement pan-Northern marketing programs and create product.

➤ **Establishment of *Northern Ontario Tourism Act* to Provide Stability and Long-term Investment.**

Goals of this Act are to:

- **Provide multi-year public funding agreements** in order to stabilize planning and investments with industry, rather than single year commitments that make it difficult to plan.
- **Create a means for revenue generation** to sustain tourism development, marketing for rural tourism that takes place outside municipalities or within small municipalities that do not have Municipal Accommodation Tax (MAT).
- **Expand role of MHSTCI in Crown land-use planning** to include participation as decision-maker as well as that of managing stakeholder consultation.
- **Formalize the role of DNO** as connection to industry to guide and invest in coordinated and strategic tourism planning development.
- **Re-introduce Tourism Field staff** to work directly with private operators on unique northern issues and programs.



Northern Ontario's Tourism Path to Prosperity

GUIDING PRINCIPLES

The adoption of principles to guide the development and implementation of *Path to Prosperity*, shared by the industry at large, will play a key role in effective implementation and are outlined below.

Path to Prosperity will:

1. **Remain nimble**, responsive and flexible to the changing operating environment.
2. **Continue to leverage** partnerships and collaboration with regional, provincial and national tourism partners to deliver a plan that reflects the unique needs of the tourism sector across Northern Ontario. More detail is provided below.
3. **Leverage** and **build** cross-sector cooperation and investments.
4. **Facilitate** regular, timely, consistent communication with industry across all regions and sectors.
5. **Share** successes and wins.

Collaboration and partnerships have been and will continue to be a cornerstone to tourism across Northern Ontario. The sharing of expertise, resources and information are elements critical to timely and effective implementation of *Path to Prosperity*. The specialized skills, knowledge and assets that partners bring, include the following.

- **Relationships with community leaders** and decision makers across sectors (municipal planning, economic development, education, for example) that in turn facilitate product development, strategic planning, workforce development and training.
- **Access to meaningful market intelligence** and market preparedness in a range of sectors that include for example, Great Lakes cruising, Indigenous tourism, Francophone tourism, resource-based tourism, cycling tourism, RV industry, festivals and events, air access, international marketing.
- **Providing advocacy support.**
- **Long term perspective and involvement** with the business of tourism.
- **Resilience** and the experience to apply to this reality.
- **Credibility** and **trust** with the industry where others do not; can be used as conduit for communications to industry.

Accessing these industry skills, knowledge and assets will strengthen recovery efforts. Ongoing and enhanced cross-Ministry collaboration and cooperation will further boost revival of the tourism sector.



POSITIONING THE INDUSTRY FOR THE FUTURE

The core goal of this Plan is to position the industry for a viable and sustainable future. Four fundamental strategies to position the industry for the future are outlined below.

➤ Looking Beyond the Immediate

COVID-19 provides a unique opportunity to pause, reflect on and plan for the future. A review and implementation of strategic priorities for the medium and longer-term needs resources and effort to critically examine such issues that include for example:

- **Impact of the anticipated long rebuilding of long-haul air travel.** Northern Ontario has never been highly dependent upon air travel, but domestic capacity in recent years was providing significant opportunities not only domestically but with connections to international and long-haul travel that the sector has invested into – both in terms of product development and in sales channels and relationships. How can Northern Ontario be positioned for the future when demand from core and emerging markets returns? What is the interim plan for both marketing investments and experience development?
- **Reviewing if there is an opportunity to adopt and/or showcase regenerative tourism/slow travel at Northern Ontario,** sub-regional, community and operator levels.
- **Rethinking delivery models** for festivals & events, sport tournaments, meetings, conferences.
- **Emergence of ‘travel corridors’ or ‘travel bridges’ between destinations with little to no active COVID cases.** Established to control the spread and also to increase confidence for travellers, these partnerships are expected to play a role in building international travel between Canadian provinces as well as between countries (such as New Zealand and Cook Islands; Singapore and Vietnam). What are the implications for visitor travel patterns, marketing and product development across Northern Ontario?

> Leveraging New Visitor Patterns and Interests

A number of new visitor patterns and interests impacting travel and tourism, detailed in a significant body of COVID-specific consumer research, are emerging that will influence the experiences and products delivered by the tourism sector not only in Northern Ontario but around the world in both the near term and the longer term.

- **Interest in out-of-the-way destinations.** Traffic to DNO's website has soared during March to August 2020. What tourism experiences and marketing tactics will convert interest to buyers? How can this interest be used to the advantage of Northern Ontario tourism operators and communities?
- **Visitors seeking 'isolation' experiences,** to travel and take part in activities with their own social bubbles.
- **Visitors embracing the outdoors,** wilderness and related activities. This new interest has put increased pressure on Crown lands, parks, waterways, with many new to outdoors experiences. How can this increased pressure and potential negative impacts on natural resources and the experience itself be managed?
- **Architecture and design as well as new ideas and concepts** in community planning (expanded patio space, dedicated cycle and walking corridors, slow streets) have emerged as key tools and factors in positioning experiences to support safe spaces that in turn provide opportunities for businesses to operate. How are communities incorporating these factors into planning?
- Current research indicates that **younger travellers are most likely to travel farther first.** Is the industry aware of this? What is the impact on marketing channels and messages at operator, community, regional and pan-regional levels?
- WTTC's Travel Demand Recovery Dashboard indicates that **'adventure stands out as the leading recovering segment'**. This bodes well for Northern Ontario.

Each operator, destination and organization must keep their eyes on these trends and be in a position to respond.

Insights from www.northernontario.travel



Searches by domestic residents on NorthernOntario.travel is up **56%** in the first five months of 2020 with **2.1 million visits**. **Top five interests for domestic visitors:**



47%

Hiking or Walking in Nature



44%

Natural attractions like mountains or waterfalls



42%

Trying local food and drink



41%

Nature parks



36%

Fall colours

Source: northernontario.travel

➤ Adapting to New Business and Operating Realities

The business landscape has changed and general uncertainty around the unknown continues to create questions, hesitation about what the future holds and how to approach longer term planning. Factors that have emerged as a direct impact of COVID include:

- **Liquidity, access to capital and debt repayment pressures** remain a challenge for some.
- **Operating at lower capacity will be the norm** due to physical distancing requirements, until an effective and broadly adopted vaccine is available. How does this impact cash flow and financial stability? Will visitors pay higher prices that in some instances may be necessary to build a sustainable tourism business?
- **Adopting and adapting to adjusted metrics of 'success'**. Long-held measures of success at both operator and destination level may need to be adapted and embraced as the longer-term impacts of the pandemic are felt.
- **Increased labour, training and equipment costs** due to enhanced cleaning, screening and monitoring of safety factors.
- **Localized flare-ups of COVID-19**, are anticipated, which may result in short term closures. What are the financial and operational impacts of re-closing and re-opening multiple times?
- **Consumer demand for flexible deposit and cancellation policies**. How can seasonal operators in particular mitigate the potential impact of reduced cash flow?
- **The pandemic has acted as a catalyst to push reluctant operators to adopt technology**. What training and support is needed?
- **What are the goals, motivations and barriers of new types of visitors to Northern Ontario?** Ongoing research completed by Destination Ontario (Consumer Sentiment and Behaviour Survey, Impact of COVID-19 on Canadian Economy and Consumer Sentiment) and Destination Canada (including Resident Sentiment & Travel Related Measures) continues to provide important insights on the domestic market. Research specific to Northern Ontario would further enhance expectations and to prepare the industry for how to access and reach them.
- **The need to update and develop new processes, introduce new programming or new experiences** for indoor built attractions in particular, especially hands-on attractions.
- **Transferring the delivery of experiences to outdoors venues** to attract visitors.
- **Developing and managing new partnerships** to support delivery of experiences to meet new expectations, health and safety protocol.
- **Marketing new experiences to existing and new types of visitors**. The industry must invest in building visual and content assets that reflect new, innovative and refined experiences that meet pandemic-specific interests and patterns. Some of these new experiences will need general education on 'what it is' in order to develop a new market, build trust that it will be safe and interesting.

➤ Keeping an Eye on Global Trends

New and emerging trends in response to the pandemic at a global continue to be identified.

- **Emergence** of Generation Z (oldest are 25 years old in 2020) and their influence on travel.
- **The rise** of wellness tourism and solo travel.
- **WFH** (work from home) transition to WFA (work from anywhere).
- **Increase** in private travel.
- **Pent up** demand in luxury travel.
- **General** embracing of a slowdown in daily pace.

Operators, communities and destinations would benefit from reflection on opportunities that these trends may present.

KEY PRIORITIES

Given the factors to be addressed noted above, key shared priorities to position the industry for the future, build on momentum, boost recovery and support as many tourism operators across Northern Ontario as possible are addressed in this plan:

Key Priorities

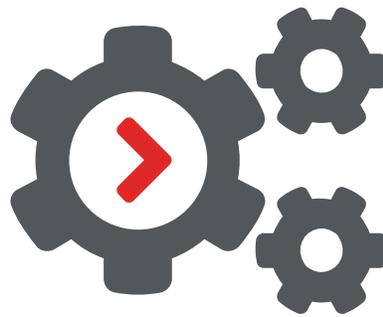
1. **A plan** for safe and timely re-opening of the border to U.S. travellers.
2. **Gathering** and **sharing** facts and insights on what travellers are seeking in the near-term and over the longer term as well as level of confidence to travel.
3. **Adoption** and **roll-out** of World Travel and Tourism Commission's (WTTC) Safe Travels Stamp to position Northern Ontario communities, destinations and operations to travellers.
4. **Implementing** experience development, marketing and sales strategies in anticipation of closed U.S. and international borders into peak summer season of 2021:
 - Identification of target market(s) and related, laser-focused and timely pan Northern marketing and sales strategy to position fly-in and remote camps and lodges as a unique and desirable option to domestic residents for 2021. This may require a non-traditional approach that might include for example 'below the line' marketing initiatives through private fishing clubs, executive suite decision-makers and related member organizations.
 - A strategy and action plan to develop and showcase experiences to entice travel off of established travel corridors for the 2021 peak summer season.
 - A strategy and action plan to showcase experiences to generate inter-regional travel throughout the North.
5. **A strategy to support** demand generators as they rebuild and rethink delivery models that include built attractions, festivals & events, sport tournaments, meetings.

Action Plan

An action plan to tackle these key priorities is presented by DNO's core pillars:

- › Product Development
- › Investment Attraction
- › Workforce Development & Industry Training
- › Marketing

Within each pillar, the **'current context'** is outlined, followed by a **'going forward'** plan.



Northern Ontario is the top destination for high yield anglers with angling tourism generating over **6,000 jobs** and contributing **\$450 million** towards Ontario's GDP. There is room for growth in new consumer bases, market shares need protection and infrastructure may need investment.

Product Development

Objective

To enhance the visitor experience through well-designed tourism products that meet current and future customer demand.

The development of new, refreshed and upgraded products and visitor experiences position any tourism destination as a new reason to visit or to return year after year. Visitor experiences, accommodations and itineraries must adapt and respond to changing expectations to remain competitive. Best practices for destinations and businesses include continual investment into product and experience development. COVID-19 makes these investments even more critical.

CURRENT CONTEXT

DNO and its partners at all levels have made significant effort in identifying and investing into highest priority 'best bet' product development initiatives. Wide-ranging in scope and location, they focus on angling & hunting, nature & adventure, touring (snowmobiling, auto/RV, boating), culture and heritage (Indigenous tourism, Francophone tourism, culinary tourism, Group of Seven), gateways & destination communities.

COVID-19 has led to some loss of momentum in product development that needs attention. COVID-19 has also accelerated and reshaped some initiatives to respond to new patterns of demand in the short and longer term, with an emphasis on products that visitors are looking for as a direct result of the pandemic - access to wide-open spaces and the outdoors.

Financial support from federal and provincial partners recently announced is directed at a range of product development priorities that include, for example snowmobile and multi-use trails,

museums, arts organization and attractions. Support for staffing of economic development in communities, in some of which tourism may play a role has also been announced. This support will help to establish momentum and support sectors hard hit by the pandemic. It will also act as a catalyst for organizations to adapt their experiences for a post-pandemic world. There are a number of product and experience innovations that are in the planning stage ahead of the peak summer season of 2021, with anticipation that some level of restrictions will still be in place.

GOING FORWARD

The optimum approach to product development is to continue to support investments that activate best bet, short-term product development initiatives, supporting new innovations for nearby residents and planning for the longer term. The net impact will be:

- **rapid** response to attract new markets;
- **new**, well-tested visitor experiences that can mature into marketing and sales to long-haul visitors, direct or through travel trade channels as global recovery unfolds;
- **diversified** visitor offers at operator and community level; and
- **diversified** visitor profile and origins.

Initiatives to support Product Development are outlined below.

Pd 01

Review Tourism Product Development Strategy and Plans through the lens of COVID-19 to position Northern Ontario for the future.

Apply the most current provincial, national, global and sector-specific research and findings to update and refocus Northern Ontario's Tourism Product Development Plan. Evolve Product Development Teams into COVID-action teams.

Pd 02

Complete timely research on resident intention to travel, interests and barriers specific to Northern Ontario.

While research at the federal and provincial level has been helpful, consumer research that measures and tracks intention to travel, interests and barriers, specific to Northern Ontario would provide strong foundations for recovery plans. This research must be shared widely with the industry, interpreting implications for operators (what are visitors looking for, where the opportunities are, barriers that need to be addressed, price and time sensitivities) and communities (municipal planning, permitting to support new capacity guidelines, use of outdoor spaces, wayfinding for example). A proposal to fund and complete consumer research has been submitted.

Inspiration & Innovation

A Socially Distanced Experience

The Ontario Festival of Small Halls presents a socially distanced outdoor dinner series in Ottawa over 3 weekends in September 2020. Each combines a boat on the water adjacent to the Terrace at the National Arts Centre, a band on the boat, a farm-to-table feast with local-inspired menus from renowned chefs. Priced at \$125 pp (taxes, gratuities, HST all in), all 6 nights over three weekends are sold out.

Capitalizing on shifts in what visitors are seeking:

The June Motel, Prince Edward County offers 'Work from the County' package available Sunday to Friday for \$1,000 for 5 nights including:

- Deluxe room with full-sized table to work from
- Small kitchenette (microwave, sink, dishes)
- Fridge stocked with 1 bottle of local wine and food
- 2 bikes to explore the County

Attracting domestic visitors:

Nimmo Bay Resort in BC's MacKenzie Sound typically welcomes international and US guests to the eco-resort with a variety of nature-based activities for 3, 4- or 7-night stays. They had to quickly pivot to sell to BC and other Canadian guests, which they have successfully done. A luxury, high-end lodge, they are also offering 'paradisolation retreats' for groups who want to book the entire property. They know that with Canadians coming this year, they have built a new, and expanded market for future. Per person, all-inclusive price range is in the \$2,000 range per day.

Pd 03

Quickly reactivate and execute Northern Ontario tourism product development initiatives that resonate with travellers as a direct result of COVID-19.

Advanced plans in place	Initiatives in development	Pan-provincial product development initiatives
<ul style="list-style-type: none"> • Lake Superior Auto/RV Touring Plan • World's Best Snowmobile Destination Plan • Experience Fishing Program • Northern Ontario Trails Strategy 	<ul style="list-style-type: none"> • Winnipeg to Thunder Bay Auto/RV Touring Route and related initiatives with RV Canada • Lake Temiskaming Auto/RV Touring Route • Great Lakes small ship cruise itineraries that include cruise/RV option • Francophone touring itineraries • The Great Ontario Road Trip 	<ul style="list-style-type: none"> • Ontario's Cycle Tourism Plan and CycleON • Great Lakes small ship cruising with connections to adjusted shore excursions • Integration of Indigenous culinary experiences into touring routes and itineraries

Pd 04

Prepare and distribute a database of ideas and inspiration, share with industry.

Sharing what has worked elsewhere often builds confidence and inspires and motivates peers to innovate. Regularly review global research to identify innovative design elements, experience delivery modifications and models that are working specific to primary activities delivered across the North. Share widely with industry in accessible formats including regular updates to the Business Reopening Toolkit and articles in e-newsletters for example.

Pd 05

Facilitate creative thinking around a new genre of products and delivery models.

The database of ideas and inspiration can be a catalyst to facilitate creative thinking with the industry on how to refine and re-invent, in some cases, their tourism experiences and products. This diversification not only provides appealing options for nearby visitors who may need a reason to visit, but also as new products to position to long haul visitors. Examples include:

- **'micro' adventures** - shorter type of experiences of all types - for nearby visitors who want to stay close to home or watch their financial resources
- **rethinking** delivery models for group/motor coach travel, festival, events, the arts, sport tournaments and meeting/convention hosting
- **linking** product, event development to non-traditional partners, venues to respect and support distance requirements.
- **combining** local features, heritage, stories, food, spirits and landscapes in unexpected ways

Investment Attraction

Objective

To increase investment in the tourism industry to enhance the visitor experience.

CURRENT CONTEXT

DNO's role in investment attraction is one of facilitating connections that currently includes:

- **Exploring** solutions to guide sustainable regional tourism development including a capital program for operators.
- **Maintaining** an up to date DNO Investment Resource Centre for industry to access.
- **Providing** advice, information and assistance with applications to organizations on sources of funding.
- **Providing** support for succession planning.

Funds that include Municipal Accommodation Tax, Main Street and economic development initiatives that may be used to support tourism product adaptation, community enhancement and infrastructure are under pressure. This pressure may limit investments specific to tourism and related partnership opportunities.

GOING FORWARD

DNO will continue its general direction and approach to Investment Attraction, amplifying and advancing activities and initiatives that will have the highest impact on industry needs due to the pandemic.

Initiatives to support Investment Attraction are outlined below.

Ia 01

Actively pursue financial resources to advance this plan.

A number of initiatives identified in this plan for recovery from the impact of COVID-19 require incremental and dedicated financial support to complete. DNO will actively pursue partnerships to leverage investments needed to implement this plan in a timely and effective manner.

Ia 02

Complete research with the tourism industry across Northern Ontario to inform recovery plans.

Industry surveys conducted by TIAO between March and September 2020 and by NOTO, focused on the resource-based sector played a significant role in meetings with governments officials, providing evidence-based information on the impact of the pandemic and needs going forward. Now is the time to gather inputs from the broader tourism industry across Northern Ontario in order to inform recovery plans.

Ia 03

Continue to engage government partners in discussions and strategies to address long-standing issues.

As noted previously, tourism in Northern Ontario is dependent upon decisions made by government agencies. Resolution of infrastructure critical to quality tourism across Northern Ontario include year-round access to washrooms, safe roads, dependable and cost-effective inter-regional transportation (bus, rail, air) would go a long way to supporting not only pandemic related travel but also support the industry over the longer term.

Ia 04

Continue to explore options to address an immediate need for financial support for some businesses.

As noted, the response to the pandemic has been uneven. Many tourism businesses would benefit from immediate financial support.

Ia 05

Work with the lending sector (commercial and government) to advocate for longer term financial support of hospitality sector, including a dedicated program for capital funding.

A dedicated program in support of capital funding for the tourism sector would go a long way to supporting a sustainable tourism sector across Northern Ontario.

Ia 06

Support investment into municipal infrastructure by linking the tourism industry to opportunities through economic development and other municipal departments and agencies.

Linking municipal investments to tourism-related uses requires ongoing attention and awareness-building of the economic and community benefits with decision-makers and influencers. With newly identified opportunities that impact municipal planning, delivery of visitor information services, architectural design, materials used, and policies impacted by COVID-19, the conversation and information-sharing needs updating and dissemination.

Ia 07

Continue to share information on government programs that could assist private operators in developing their attractions and enhancing their consumer offerings.

There are an overwhelming number of announcements for new programs, adjustments and extension of existing programs related to the pandemic. Timely sharing of these opportunities with industry through cooperation with partner organizations should continue.

Ia 08

Expand support and celebration of entrepreneurial ingenuity in the industry.

Sharing of successes specific to Northern Ontario tourism's response to the pandemic will play a role in building confidence and keeping spirits up across the industry. Celebrations can go beyond annual awards presented at the Northern Tourism Summit and become a part of regular communications

Ia 09

Pursue an expanded partnership with Ontario Tourism Innovation Lab and its Spark Program.

The 2020 partnership will be delivered in Northwestern Ontario and highlights the need for generating new ideas for tourism Northern Ontario that respond to COVID-specific needs and realities. Can more of these opportunities be replicated elsewhere?

Workforce Development & Industry Training

Objective

Facilitate and support the attraction, development and retention of a tourism workforce to enhance the customer experience.

The ultimate goal of Workforce Development and Industry Training (WDIT) is to provide a wide variety of programs, tools and resources that are focused on enhancing the visitor experience and appeal of Northern Ontario, to attract more visitors and increase yield with a focus on a 'Visitor First' perspective.

CURRENT CONTEXT

As with product development, the tourism industry invests continually in workforce development and industry training. The 'visitor first' experience has changed during COVID-19 and workforce development and training initiatives delivered by DNO and its partners will continue to adjust to reflect this.

The means to deliver training, at least in the short term, have also been limited to on-line delivery by COVID-19.

DNO, through Tourism Excellence North (TEN) has invested significant effort into developing content and tools specific to the needs of Northern Ontario's tourism sector. These established assets provide a strong foundation to deliver pandemic-specific training and development programs.

Timeliness is critical as the need is now.

DNO responded quickly to the industry's need for information, training and peer-to-peer support with the delivery of the *Adapt 2020: A Webinar Series for Tourism* coordinated by TEN. These one-hour sessions delivered by external subject matter experts across a number of fields that included, for example, tourism, health and safety, finance, and succession planning were well-attended and well-received by attendees from across Northern Ontario as well as those from other areas of the province. For many, it was their first exposure to TEN, increasing awareness of TEN as a hub for a range of information, resources and support.

A number of wide-ranging COVID-related workforce training, development and planning tools continue to be rolled out by such partners as the Ontario Tourism Education Corporation (OTEC), Tourism HR Canada (Tourism Workforce Recovery Toolkit), Manitoba Tourism Education Corporation ('Clean it Right' program), Destination Ontario, Destination Canada (Marketing Tips and Tricks) and the World Tourism and Travel Council (Global Safety Protocols by sector). DNO will continue to highlight the range of resources available while addressing the unique needs of the Northern Ontario tourism sector.

GOING FORWARD

DNO, through TEN, will move forward with planned initiatives to address WDIT core skills gaps and training requirements, while also addressing the challenges presented because of COVID-19.

TEN will develop instructional materials to support delivery of a robust and 'Learner First' on-line format including a mix of participation and collaboration, Webinars, digital workshops that feature small group work on-line and private 1:1 coaching/consulting. Training will be a mix of on-demand and scheduled training. TEN will resume in-person training, selectively as appropriate and/or introduce a hybrid of in person/on-line training to reduce travel and cost while still reaching many in the tourism sector.

DNO will deliver the *Virtual Northern Ontario Tourism Training Week* in late November 2020 in lieu of the annual Northern Ontario Tourism Summit. The format will be evaluated for the future.

Initiatives to support Investment Attraction are outlined below.

Wd&it 01

Facilitate adoption of international and sector-specific safety and health operating protocols by operators and communities.

Travellers want the confidence that the places they visit and the activities they participate in are delivered in a safe manner that minimizes the risk of transmission of COVID-19. A number of protocols exist at the provincial, national and international level. TIAO has launched a partnership with WTTTC to encourage adoption of their *Safe Travels Stamp*. This initiative will

require a level of individual education and support to encourage operators and communities across Northern Ontario to review and adopt protocols, then to feature in marketing and communications messaging as appropriate. TEN can play lead role in communicating the 'what' and 'how' to the industry as part of training activities and messaging.

Wd&it 02

Review and revise as needed, current TEN tools in support of experience, culture and quality shift priorities to reflect immediate COVID-specific needs of operators and communities. Partner and collaborate where necessary.

<p>Implementing health and safety Protocols</p>	<ul style="list-style-type: none"> • Introducing protocols– to staff, to visitors • Working with local health units to train staff, management and volunteers to understand on the ground realities to ensure that they feel safe working in an environment where they could be susceptible to the virus. What they can do to keep themselves and the patrons safe and reduce liability to the business?
<p>Rethinking the visitor experience from operational perspective</p>	<ul style="list-style-type: none"> • Adapting to reduced operating capacities. • Shifting to new target demographics and markets; development of new products for these markets, short term and long term; shifts in staff training to serve new types of customers. • Planning every stage of visitor touch point to reflect new reality.
<p>Understanding, managing financial impact of new visitor experiences, immediate and long-term</p>	<ul style="list-style-type: none"> • New pricing models for reduced visitor capacity to ensure financial viability; what will the market support? • Impact on operating costs, staffing levels and skills. • Identifying capital costs to meet physical distancing and other safety protocols. • Managing cash flow in new operational reality.
<p>Digital activation and transformation</p>	<ul style="list-style-type: none"> • How to adopt or enhance e-commerce, on-line marketing. • Implementing e-marketing/communications to existing and new markets. • Adopting on-line tools for staff recruitment, hiring, training
<p>Rethinking the community role and response to the visitor experience</p>	<ul style="list-style-type: none"> • Modifying delivery of visitor information services. • Modifying role as gateways. • Adopting shared messaging to build a welcoming community. • Short term and longer term thinking around planning, permitting and use of municipal infrastructure to support safe distance guidelines. • Creative thinking around festivals and events, tournaments, meetings.

Wd&it 03

Continue to adapt, refine or source from third parties training and development tools to support the short-term needs and realities of the industry that may include for example:

- Refining Fast Track to Success templates and targeting operators who would benefit most from this one-on-one mentoring opportunity.
- “Tourism Business Essentials in the Time of COVID” that facilitates the sharing and adoption of new strategies in response to COVID-19 in highest need sectors such as angling/hunting.
- Updated activity and sector-specific self-assessment tools to include COVID-specific considerations.

Wd&it 04

Continually update the Business Reopening Toolkit for industry with highlights, interpretation and implications of global research.

The range of consumer research related to travel and tourism and the pandemic is significant and very useful to the front line. Examples include ongoing research completed by Destination Ontario and Destination Canada, WTTC’s Travel Demand Recovery Dashboard, Adventure Travel Trade Association’s US Adventure Traveler Sentiment June-July 2020 as well as research completed by Skift, Trip Advisor and other companies. The sheer volume makes it difficult for operators and communities to filter what is most relevant to them and to answer the question ‘now what?’ Interpretation and dissemination of data and trends relevant to primary sectors in Northern Ontario would strengthen refinement of experiences and products.

Wd&it 05

Adopt a partnership model of shared investments.

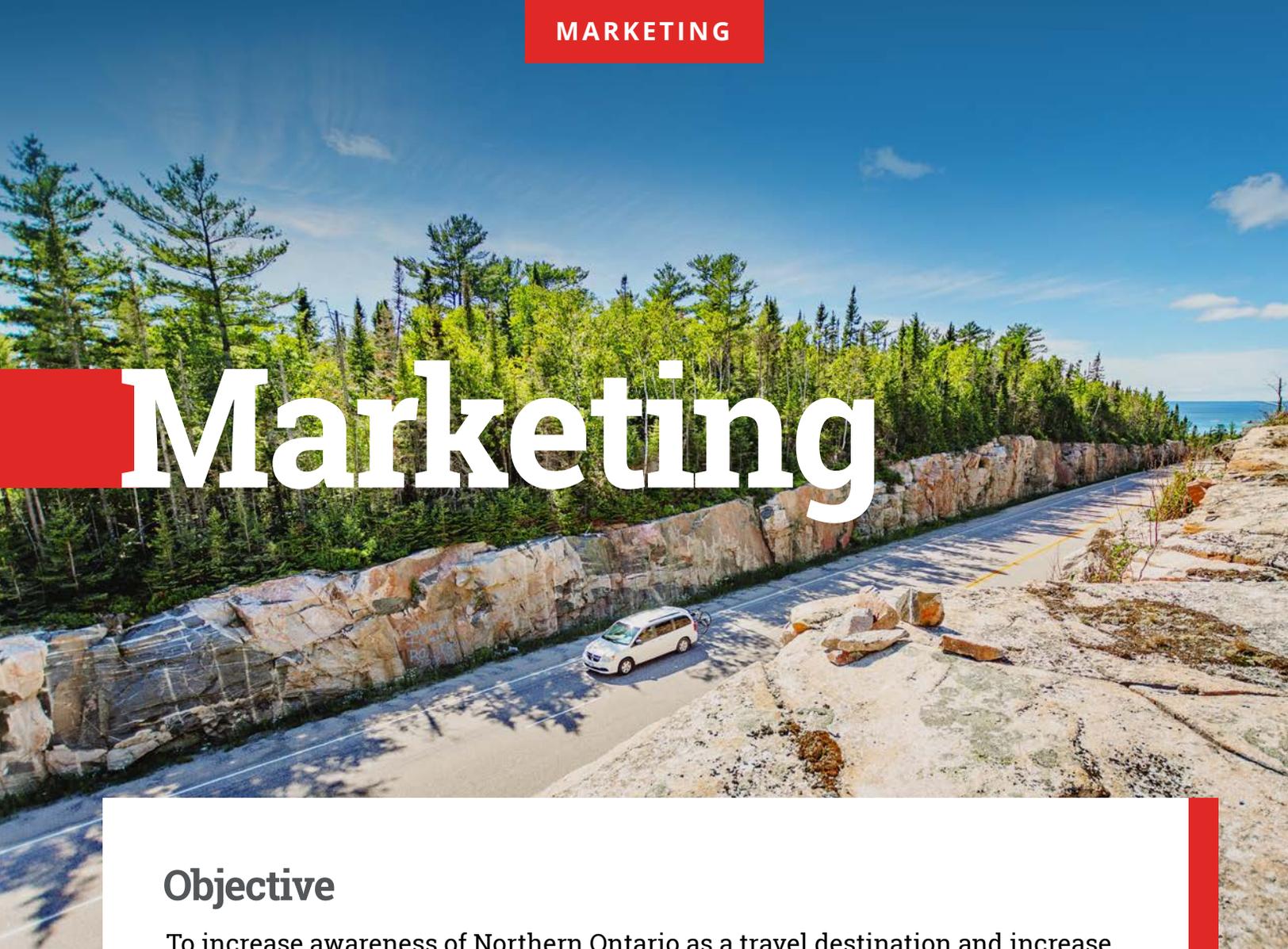
Tourism across Northern Ontario would benefit from partnerships between industry, DMOs, destinations and TEN for example, to encourage and support active participation in training and skills development. Models may include, for example, financial support from DMOs, industry, destinations and DNO/TEN on declining basis over a fixed time frame.

Wd&it 06

Put strategies in place to minimize barriers to hi speed Internet.

On-line connectivity and capacity that provides access to training, development and general support for the industry at large as well as those who can now ‘work from anywhere’ is critical. Delivery of on-line training should be expanded not only through coordinated delivery with centralised educational facilities to reach industry that may otherwise have limited access, but through partnerships with other educational and community development agencies and organizations.

Marketing



Objective

To increase awareness of Northern Ontario as a travel destination and increase conversion in target markets.

CURRENT CONTEXT

Investments into sales and marketing, from building awareness to driving inquiries to a range of options for booking, are both immediate and longer-term in nature. Sales and marketing to overseas visitors, and efforts to secure meetings, incentive travel, conferences are multi-year, while sales to nearby residents and current visitors is often more immediate. While attention is now on driving short term bookings, longer term needs cannot be ignored to position Northern Ontario as recovery builds.

These goals require different tactics and investments and will be competing not only within Ontario, but with Canadian provinces and territories and US border states with the same overall goals when the borders open.

GOING FORWARD

A foundation for DNO’s marketing efforts is to remain nimble and ready to change course or pace to support reopening of the province, country and travel borders as well as any re-closures should they arise. DNO will continue to align marketing strategies to showcase current and new best bet segments, maintain strong traditional markets where viable and pursue new and emerging markets.

Short term

- **Generate** visits from near markets.
- **Maintain** presence and momentum in long haul domestic, US and overseas markets to build interest and booking for future travel.

Medium term

- **Convert** dreaming and inquiries to bookings.
- **Retain** new near market visitors to diversify and protect for future.

Long term

- **Attract** diversified types and origins of new and returning visitors.

This approach will be supported by coordinated and strong provincial and national strategies for driving hyper-local travel in 2020 and 2021, followed by narrow targeted campaigns into the U.S. as markets return and to overseas visitors in alignment with Destination Ontario and Destination Canada. Initial campaigns for summer 2020 are coming to a close and those for fall 2020 and winter 2020/21 are under way. Destination Canada has just launched a Canada Expedia Microsite.

DNO will continue to work closely with its sub-regional marketing partners to deliver digital

marketing and social media campaigns, leveraging their on-line reservation systems, content development and writing skills and extended reach through databases of consumers and relationships with influencers, media and travel trade.

Messaging in the short term highlights the value of “distance experiences” that include remote and outdoor experiences where crowding is not a significant threat. This messaging may also attract people looking for a lifestyle change and/or business opportunity.

Initiatives to support Marketing are outlined below.



Imbed safety and health messaging as a cornerstone in pan-Northern communications tactics and activities.

Messaging that includes benefits of businesses and communities adopting WTTC’s Safe Travels Stamp program, other initiatives developed and endorsed by sector organizations and success stories will help to position travel to and through Northern Ontario. A creative and centralized approach will benefit the industry across the region with two streams of messaging related to safety and health as a cornerstone of all communications:

1. To visitors to encourage travel.
2. To community leaders, influencers and decision-makers to adopt Safe Travels Stamp.

Mk 02

Review planned marketing investments with a COVID-19 lens to reflect shift in traveller interests and priorities.

The shift to encourage hyper-local travel is expected to be in place for the next number of months and potentially into the peak summer 2021 season, due in part to continuing closure of the US-Canada border to ground travel and restrictions on international travel into Canada. DNO and its partners must critically review current plans and adjust marketing activities and messages to align with traveller interests and ability to travel.

Mk 03

Plan for a marketing and communications strategy and related tactics to respond to closed U.S. and international borders in 2021.

Pan-Northern marketing messages in response to the pandemic are different than in a 'normal' world, as they must reach markets that are not necessarily in the mix as well as showcasing what is new or has been adjusted. As experience development plans evolve to support key priorities, marketing and communications must follow to:

- **Showcase** and attract domestic visitors to remote and fly-in fishing camps.
- **Lodges and camps** reliant upon the U.S. market were hard hit in 2020 and there is no guarantee that it will be business as usual in 2021. Coupled with experience development and refinement, putting a consumer awareness and marketing plan in place now for this contingency will play a role in stabilizing this high yield sector, should the 2021 season be challenged.
- **Shift** traveller patterns away from established travel corridors.
- **Travel patterns** in the summer of 2020 stayed primarily on established travel corridors. A strategy and action plan to develop and showcase experiences to entice travel off of established travel corridors, supported by related marketing activities for the 2021 peak summer season would help manage visitor impact and retain a quality experience that is not marred by overcrowding. This strategy would benefit many communities and operators.
- **Generate** inter-regional travel throughout Northern Ontario
- **An increase** in inter-regional travel can have a positive impact on economic activity.
- **Support** demand generators as they rebuild and rethink delivery models
- **Residents** and near-by visitors will benefit from an introduction to new delivery models and experiences as they are rolled out by built attractions, sporting activities and festivals.

Mk 04**Facilitate the designation of select new visitor experiences as Ontario and Canadian Signature Experiences.**

Work with industry to identify and position new experiences as Ontario and Canadian Signature Experiences. The resulting marketing and sales support for these designations will help in positioning Northern Ontario experiences to domestic and long-haul travellers in the future.

Mk 05**Work with partners to showcase Northern Ontario on national and international platforms.**

DNO and its marketing partners have the opportunity to build enhanced awareness of Northern Ontario by acting as a catalyst to position established high quality and unique COVID-friendly experiences on such platforms as Destination Canada's Canada Expedia Microsite.

Mk 06**Continue investment in media FAMs and influencers.**

Path to Prosperity

ACTION PLAN

The consolidated rolling action plan to lead tourism in Northern Ontario on the Path to Prosperity is presented below.

		Optimum timing	Actions to initiate	Resources to advance (new, existing)	Who Leads	Who Supports
Solutions for moving forward to recovery						
1	Create Border Task Force					
2	Continue to provide clear and timely communications					
3	Shape consumer, business and community mindsets					
4	Seek multi-year financial support for industry organizations that rely on industry memberships					
5	Build support for establishment of <i>Northern Ontario Tourism Act</i> to provide stability and long-term investment					
Product Development						
1	Review Tourism Product Development Strategy and Plans through the lens of COVID-19 to position Northern Ontario for the future					
2	Complete timely research on resident intention to travel, interests and barriers, specific to Northern Ontario					
3	Quickly reactivate and execute Northern Ontario product development initiatives that resonate with travellers as a direct result of COVID-19.					
4	Prepare , distribute a database of ideas and inspiration					
5	Facilitate creative thinking around a new genre of products, delivery models					
Investment Attraction						
1	Actively pursue financial resources to advance this plan					
2	Complete research with the tourism industry across Northern Ontario to inform recovery plans					
3	Continue to engage government partners in discussions and strategies to address long-standing issues.					
4	Continue to explore options to address an immediate need for financial support for some businesses.					
5	Work with the lending sector (commercial and government) to advocate for longer term financial support of hospitality sector, including a dedicated program for capital funding					
6	Support investment into municipal infrastructure by linking tourism industry to opportunities through economic development and other municipal departments and agencies					

Path to Prosperity

ACTION PLAN

The consolidated rolling action plan to lead tourism in Northern Ontario on the Path to Prosperity is presented below.

		Optimum timing	Actions to initiate	Resources to advance (new, existing)	Who Leads	Who Supports
Investment Attraction (cont'd)						
7	Continue to share information on government programs that could assist private operators in developing their attractions and enhancing their consumer offerings.					
8	Expand support and celebration of entrepreneurial ingenuity in the industry.					
9	Pursue an expanded partnership with Ontario Tourism Innovation Lab and its Spark Program					
Workforce Development & Industry Training						
1	Facilitate adoption of international and sector-specific safety and health operating protocols by operators and communities					
2	Review and revise as needed, current tools in support of experience, culture and quality shift priorities to reflect immediate COVID-specific needs of operators and communities. Partner and collaborate where necessary.					
3	Continue to adapt, refine or source from third parties training and development tools to support the short-term needs and realities of the industry					
4	Continually update the Business Reopening Toolkit for industry with highlights, interpretation and implications of global research					
5	Adopt a partnership model of shared investments					
6	Put strategies in place to minimize barriers to hi speed Internet					
Marketing						
1	Imbed safety and health messaging in pan-Northern tactics and activities					
2	Review planned marketing investments to reflect shift in traveller interests and priorities					
3	Plan for a strategy and related tactics to respond to closed U.S. and international borders in 2021					
4	Facilitate the designation of select new visitor experiences as Ontario and Canadian Signature Experiences.					
5	Work with partners to showcase Northern Ontario on national and international platforms					
6	Continue investment in media FAMs and influencers					

Next Steps:

DNO will take the lead role to engage partners at all levels and coordinate actions to deliver and communicate on the Plan to Prosperity.

Appendix

› Tourism across Northern Ontario is multi-layered and complex.

Leadership, regulations, funding programs, advocacy and marketing relating to the tourism sector comes from municipal, provincial, federal and sector-specific organizations and ministries. To illustrate the number and complexity of this industry, provincial ministries that tourism touches are outlined below:

- Heritage, Sport, Tourism and Culture Industries
- Energy Northern Development and Mines
- Natural Resources and Forestry
- Environment, Conservation and Parks
- Labour Training and Skills Development
- Agriculture, Food and Rural Affairs
- Economic Development, Job Creation and Trade
- Finance
- Francophone Affairs
- Health and LTC
- Indigenous Affairs
- Infrastructure
- Transportation

Federal and municipal stakeholders, many in parallel to provincial partners listed above, add further layers.

› The tourism sector in Northern Ontario is dependent upon decisions made by Government Agencies at all levels that impact ability to operate and how to operate that include:

- Reliable long-term access to federal and provincial Crown lands.
- Open borders: US/Canada; Interprovincial borders (Ontario/Quebec; Ontario/Manitoba), international travel.
- Regular, affordable and safe transportation for regional, domestic and international visitors:
 - Major airlines for long haul travellers;
 - Regional airlines as connectors and for inter-regional travel;
 - Private aviation services used by remote and fly in lodges for guests, staff and supplies;
 - Train, bus, ferry services;
 - Marinas for boat-only access lodges and camps;
 - Waterway access and launching portals;
 - Well-maintained highways with related traveller infrastructure (washrooms, gas, food, accommodation) available year-round;
 - Stabilized gas prices for Northern Ontario;
 - Access to hi-speed Internet to support effective marketing and sales functions as well as facilitating peer-to-peer connections and support and a range of workforce development and training opportunities; Ground transportation connecting cruise ship passengers and long-haul visitors to activities and experiences; and
- Continued investment into highways, roads and trails.

➤ Direct and indirect economic activity of the tourism industry is far reaching.

The cascading economic impact of lost revenue to date and what is projected to come based on closed borders, reduction in airline capacity and changes in visitor patterns, is significant.

- **Loss** of Municipal Accommodation Tax (MAT) revenue collected by accommodators that is shared with municipalities for investment into tourism initiatives, with longer term impact unknown.
- **Decrease** or loss of revenue to sector organizations and businesses that rely on membership fees, partnered marketing initiatives, insurance premiums.
- **Decreased** spending in communities by tourism businesses and their customers for food & beverages, catering, supplies, services, gas, restaurants, ground transportation (car rentals, motor coach, vans), retail, accommodation.
- **Potential** loss of festival and event sponsors.

➤ There are many nuances and differences across the tourism industry in Northern Ontario.

These nuances should be kept front and centre as an action plan is refined and implemented as a 'one size fits all' response to COVID-19 does not meet the needs of a diverse sector or the marketing needs of unique travel corridors.

Origin of visitors and geographic context differs by:

- **Location:** Manitoulin Island, Lake of the Woods, Thunder Bay, North Bay and Temiskaming, for example, each have very different markets they draw from and distinct mixes of seasonal and year-round residents.
- **Accessibility and transportation options:** urban, rural, remote; fly-in; drive-in
- **Proximity and accessibility to new markets for the short term:** shaped by interprovincial and international borders; access to flights, rail, highways and roadways.

Seasonality of operation impacts opportunities and windows to generate business:

- **Seasonal:** winter, spring/summer; three-season (spring/summer/fall)
- **Year-round**
- **Fixed date** and annual sports tournaments, meetings, events, festivals and Pow Wows hosted in communities of all sizes

Operational profile, ownership and management impact flexibility, capacity to adapt, invest, scalability:

- **Long-time family-owned/operated;** some with non-family management
- **Stage of ownership:** new entrepreneur, growth stage; mature stage; exiting owner/succession under way
- **Lifestyle** or business profile/goals
- **Corporate,** private or publicly owned (municipal, provincial, national)
- **Reliance** on volunteers

Product and experience focus and diversity shapes options:

- **Focus** on traditional single activity sector (avids) such as angling/hunting, snowmobiling, cycling or multi-activity trip (RV/auto touring)
- **Level** of diversification from core business, season
- **Degree** of reliance on access to natural resources, wildlife (consumptive and non-consumptive), weather conditions (snow, ice to support winter activities), access to Crown lands

The nature of each operation dictates the need and access to financing for capital investments, upgrades to furniture, fixtures and equipment (FF&E), recruiting, training:

- **Degree** of capital or labour intensity
- **Built** or natural attraction
- **Public** or private sector

The role and reach of tourism sector in each community and destination varies:

- **By maturity:** new to tourism or long-time economic activity
- **Whether** year-round or seasonal
- **Whether** a gateway, destination or touring stop
- **Whether** a regional destination for residents and their visiting friends and relatives (VFR)
- **By profile** and mix of tourism assets in the community: public sector, private sector; built, natural.



destinationnorthernontario.ca
northernontario.travel

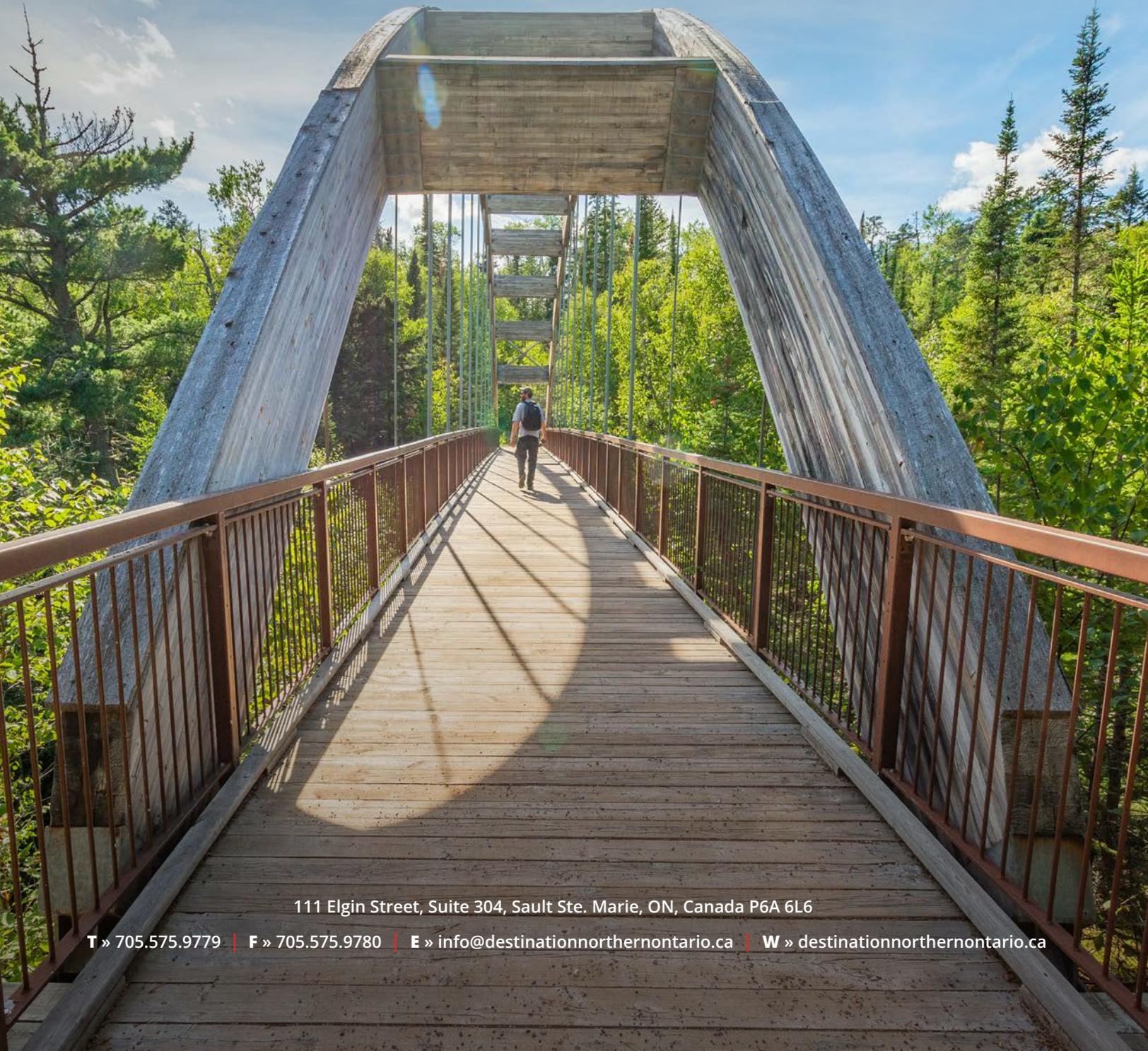


GLOSSARY OF ACRONYMS

CMA	Census Metropolitan Areas
CBRE	CBRE Group (consulting firm)
DMO	Destination Marketing Organization
DNO	Destination Northern Ontario
FAM	Familiarization Tour
IA	Investment Attraction
KPI	Key Performance Indicator
MHSTCI	Ministry of Heritage, Sport, Tourism and Culture Industries
NOHFC	Northern Ontario Heritage Fund Corporation
NOTO	Nature & Outdoor Tourism Ontario
Q	Quarter
RTO	Regional Tourism Organization
SEP	Summer Employment Program
SIP	Strategic Implementation Plan
TEN	Tourism Excellence North
TIC	Travel Information Centre
TSRC	Travel Survey of Residents Canada
VFR	Visiting Friends & Relatives



DESTINATION
**NORTHERN
ONTARIO**



111 Elgin Street, Suite 304, Sault Ste. Marie, ON, Canada P6A 6L6

T » 705.575.9779 | **F** » 705.575.9780 | **E** » info@destinationnorthernontario.ca | **W** » destinationnorthernontario.ca