STRATEGIC DIRECTION FOR MARKETING TOURISM IN NORTHERN ONTARIO
2017-2020
INTRODUCTION

The Ontario Tourism Marketing Partnership Corporation (OTMPC) has developed this Strategic Direction for Marketing Tourism in Northern Ontario (Northern Tourism Strategic Direction) in collaboration with the OTMPC Northern Tourism Marketing Committee and Northern Regional Tourism Organizations, Tourism Northern Ontario (RTO 13) and Explorers Edge (RTO 12), as well as with input from principal relevant stakeholders.

This Northern Tourism Strategic Direction has recognized that significant consultation, research and knowledge already exists and should be applied to the creation of refreshed direction for developing and marketing Northern Ontario’s tourism experiences.

Any Northern Tourism Strategic Direction must respond to a dynamic and constantly changing environment impacted by economic and cultural factors and changes in digital communication in order to appropriately reflect the unique opportunities and challenges of the North.

This Northern Tourism Strategic Direction is intended to be a tool for all private and public sector tourism stakeholders engaged in marketing and developing Northern Ontario’s tourism industry to develop collaborative tourism marketing and development programs and to encourage resource alignment.
### STRATEGIC DIRECTION FOR MARKETING TOURISM IN NORTHERN ONTARIO 2017-2020

#### OTMPC VISION

**TO POSITION ONTARIO AS A PREFERRED GLOBAL DESTINATION**

<table>
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<tr>
<th>NORTHERN VISION</th>
<th>NORTHERN MISSION</th>
<th>NORTHERN VALUES</th>
<th>NORTHERN MANDATE</th>
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<tr>
<td>To position Northern Ontario’s unique experiences as a key element of Ontario’s tourism destination offering</td>
<td>To generate increased tourism visitation to and expenditures within Northern Ontario through collaborative and effective marketing programs and partnerships</td>
<td>Accountability, Creativity, Collaboration, Effectiveness, Excellence, Alignment, Partnership, Fairness</td>
<td>Marketing strategies and partnerships are developed in collaboration with Northern Tourism Stakeholders, Northern Regional Tourism Organizations and OTMPC. Marketing of Northern Ontario will be aligned with the broader OTMPC Strategic Plan and annual marketing strategies representing the North’s unique experiences and assets.</td>
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FOUNDATION

Northern Ontario has established a strong tourism marketing foundation built upon two previous Northern Tourism Marketing Strategies: Northern Ontario 5 Year Tourism Marketing Strategy 2008 - 2012 and Northern Ontario Tourism Marketing Strategy 2012 - 2017. Recent research efforts have strengthened understanding of the tourism industry in Northern Ontario (see appendix).

The following key elements constitute the foundation that will support successful implementation of the Northern Tourism Strategic Direction.

COLLABORATION AND PARTNERSHIP

Northern Ontario has demonstrated a commitment to working through extensive partnerships and has been acknowledged for collaborative effort. However, in order to invest in future opportunities and meet the challenges referenced in this document, it will be essential to enhance planning and collaboration between OTMPC, Tourism Northern Ontario, Explorer’s Edge, Northern DMO’s and various Associations.

The goal of working in collaboration and partnership is to ensure effective use of marketing resources and, when realistic and appropriate, to align and coordinate strategies and operational plans. Through an increased emphasis on shared planning and communication, Northern Ontario will maximize the impact of marketing efforts, resulting in increased visitation, overnight stays and visitor expenditures.
RESEARCH

Through the efforts of Tourism Northern Ontario, a significant body of research and analysis has been undertaken on the key sectors of Northern Ontario's Tourism Industry. This body of research is further augmented by the work of OTMPC, Ministry of Tourism Culture and Sport and other sources. (Refer to appendix).

Northern Ontario must continue to invest in research to monitor consumer and market conditions, identify and respond to products and consumer segments unique to the North, and improve the effectiveness of marketing efforts.

NORTHERN ONTARIO'S COMPETITIVE ADVANTAGE

Based on the research and inputs, clearly Northern Ontario's competitive advantage must be recognized as accessible "outdoors" or "wilderness". Experiencing the outdoors/wilderness may occur in multiple ways, with differentiated products attracting different consumer segments, from an urban stay and tour on the Agawa Canyon Tour Train to a lodge based fishing experience to driving scenic highways, to name some examples.

In his ground breaking book “Last Child in the Woods: Saving our Children from Nature Deficit Disorder (2005)”, Richard Louv identifies the lack of nature in the lives of today's wired generation as the "nature-deficit". Northern Ontario's outdoor and wilderness experiences are well positioned to address this deficit and provide positive health benefits.

Another key element of Northern Ontario's competitive advantage is our pristine environment. Abundant clean fresh water and air are and will continue to be, a point of differentiation for Ontario and specifically Northern Ontario.
NORTHERN TOURISM PRODUCTS AND EXPERIENCES

Northern Ontario is both blessed and challenged with a vast geography and wide range of natural and manmade attractions and experiences. A cornerstone of the Northern Tourism Strategic Direction is the need to encourage a fulsome understanding of the experiences, products and human resources that currently comprise Northern Ontario’s tourism industry. Further, the need to continually improve and adapt existing Northern Ontario tourism products to meet changes and opportunities in consumers or market conditions will be an ongoing priority.

Product and destination development plans for Northern Ontario are the responsibility of regional tourism organizations and Northern DMO’s. OTMPC will support new market ready products and experiences.

The development of this Northern Tourism Strategic Direction and the product development analysis undertaken by the RTO’s, have identified six priority product and experience areas that represent opportunity for Northern Ontario in the near term:

1. **Fishing**: maintain current experiences and develop new experiences and capacity to address changing market and consumer expectations (e.g. fly fishing).

2. **Culture and Heritage**: enhance as a primary product experience which should address a broad range of experiences including:
   a. The Group of Seven
   b. Indigenous Culture
   c. Francophone Culture
   d. Food / Culinary Tourism

3. **Touring**: continue to support all existing and future aspects of year round powersports touring and support for new product as they comes forward including:
   a. Motorcycle
   b. Auto and RV
   c. Snowmobile and ATV Trail Touring
   d. Boating and Great Lakes Cruising

4. **Nature and Adventure**: continue to promote outdoor adventure products (for example paddling, cycling, and hiking) that address domestic and international consumer and trade demand for a wilderness experience.

5. **Gateway and Urban Communities**: promote as destinations and gateways to outdoor and wilderness experiences and capitalize on opportunities in:
   a. Festivals and events
   b. Attractions
   c. Sport tourism
   d. Meetings and incentive travel.

6. **Hunting**: identify niche consumer segments and promote accordingly e.g. Spring Bear Hunt.
NORTHERN TOURISM STRATEGIC DIRECTION

Building on the foundation and key elements, the following provides a framework for aligning collaborative efforts:

1. GROW NORTHERN ONTARIO’S CONSUMER BASE

Avid / Niche Travellers

Avid or Niche travellers are consumers who have a passion for and commitment to a specific Northern Ontario or outdoor adventure activity and who travel specifically to engage in that activity. Current research and the previous strategies all recognize the importance of Avid or Niche travellers to Northern Ontario. Avid travellers include Anglers, Hunters, Motorcyclists, Snowmobilers, Paddlers, and so on, all of whom enjoy one or more aspects of the unique tourism products offered in the North.
PRIORITY CONSUMER SEGMENTS

North American Consumer Segments:

Beyond the Avid traveller, the OTMPC Consumer Insight Research study identified four priority North American consumer segments for Northern Ontario:

**KNOWLEDGE SEEKERS**

Couples aged 55+ who are nearing retirement, Knowledge Seekers are empty nesters looking to expand their minds through cultural experiences and understanding the places they visit.

**UP & COMING EXPLORERS**

Young affluent families, looking to explore and learn as a family. This group includes a high percentage of visible minorities and immigrants, who are looking to explore attractions, adventure and the outdoors, starting closer to home.

**CONNECTED EXPLORERS**

Looking to escape, connected explorers are youthful (18-34), travel without children and enjoy authentic experiences. They are committed to expanding their horizons through travel with a strong interest in adventure and the outdoors and a desire to escape from the everyday.

**NATURE LOVERS (SECONDARY)**

Families with kids, have a passion for experiencing the great outdoors together. Travel for them is all about exploring new, undiscovered places off the beaten path, who are looking to be dazzled by awe-inspiring nature.
International Consumer Segments:

Tourism Northern Ontario has aligned with appropriate Destination Canada Explorers Quotient EQ consumer segments that demonstrate interest in Northern Ontario products and experiences. As a result they have identified three target EQ segments:

a. Free Spirits
b. Cultural Explorers
c. Authentic Experiencers

Other Consumer Segment Considerations:

Within these consumer segments, Northern Ontario will need to consider the cultural and demographic opportunities that exist and adapt messaging to appeal to ethnic communities, newcomers to Canada, and demographic cohorts (e.g. Millennials), who may be encouraged more in the future to learn about and embrace the outdoors, and consider a vacation north.

The Tourism Northern Ontario research clearly identified the significant impact and opportunity consumers make when they are visiting family and relatives (VFR). Consideration of local “ambassador” strategies that will engage VFR visitors in tourism related activities such as festivals, events, attractions etc., should also be considered.
Northern Ontario has clearly defined geographic markets and travel patterns which must be maintained and grown, within the budgets that exist. Therefore, based on geography and travel corridors the Great Lakes/near border US states and the domestic Ontario market will remain a priority.

Moving forward, a diversified market perspective that considers international markets with strong interest for Northern Ontario experiences through both FIT (Fully Independent Traveller) and trade channels must be developed. This will introduce new consumers with longer stays, higher yield and interests in new experiences.

Each Northern DMO and region will identify appropriate strategies and tactics for geographic markets and where appropriate align, participate and support OTMPC and Destination Canada market strategies.
Planning and investment collaboration in Northern Ontario’s tourism marketing efforts will continue to be imperative. Through the OTMPC Northern Committee, given RTO13 and RTO12 participation, a broader based formal process should be developed where detailed plans can be shared, collaboration initiated and partnerships formed. This broader and formalized process should address the following to encourage alignment and coordination of efforts:

- Build upon existing priority products and support new products and experiences as developed;

- Clearly define roles and responsibilities for all parties engaged in the Northern Ontario tourism marketing eco-system;

- Align with the Ontario overarching brand (Ontario Yours to Discover) and its brand promise while maintaining existing brand(s) equity and strength of RTOs, DMOs and appropriate industry associations to maximize benefit for Northern Ontario;

- Define a clear consumer purchase cycle to guide timing and identify roles and responsibilities from lure to fulfilment

- Develop a clear consumer path to purchase that minimizes the number of layers or clicks from inspiration to purchase; and

- Establish a comprehensive outcomes measurement process to share key performance indicators and coordinate program assessments.
**4 IMPROVE DISTRIBUTION AND ENGAGEMENT: TRADITIONAL PATH**

The traditional path refers to traditional media approaches such as specialty TV, radio, tactical print, media relations and consumer shows. Traditional media still play an important role to promote targeted activity and in some cases to lever content development and digital support.

In some cases, such as the OTMPC avid programs, celebrity based TV and radio provides significant frequency and reach to target audiences and also generates vital content for digital and social use.

Avid oriented consumer shows continue to play a significant role in engaging specific target markets and consumers. Media Marketplaces (such as Canadian Media Marketplace) and media relations must continue to play an important role in generating stories for traditional and digital sources, as earned media greatly extend the story of Northern Ontario well beyond paid promotion.
INVEST MORE IN DISTRIBUTION AND ENGAGEMENT: DIGITAL PATH

The fast paced change in digital and social channels will continue to impact Northern Ontario and create opportunities to engage consumers through multiple new channels. Northern Ontario has significantly invested in using content as a means to engage consumers and such investments will continue to be a priority. Northern Ontario will continue to aggressively embrace digital and social channels, carefully aligning and supporting them with traditional media efforts by:

- Maintaining investment in the Northern Portal and Ontariotravel.net, continuing to grow and adapt content to engage consumers and presenting opportunities to purchase;
- Utilizing existing and emerging social channels to simulate consumer and industry sharing of content and engagement;
- Aligning digital and social tactics with consumer segments preferences for specific communication channels and market realities;
- Utilizing media / influencer relations and familiarization opportunities to develop content for use on ontariotravel.net, Northern Portal and stakeholder;
- Develop and engage home grown Northern Ontario social influencers;
- Maximizing the potential of Ontariotravel.net through active updating of content on regional and avid sections and where possible align and cross link with content on the Northern Portal and stakeholder sites;
- Simplifying the consumer’s path to purchase by reducing the number of clicks that lead to an actual opportunity to purchase;
- Allowing for in campaign monitoring and adjustment of digital and social strategies to maximize effectiveness.
6 INVEST IN TRAVEL TRADE AND GROUP TOUR

While Northern Ontario offers a limited number of strong trade products, more packages and operators committed to the trade channel are required. International and North American receptive travel trade will remain a key aspect of the Northern Tourism Strategic Direction. Collaborative efforts can focus on travel trade training for operators, package development by OTMPC, RTOs and DMOs, support of the Signature Experiences process, and engaging the travel trade at events such as Rendezvous Canada.

The Group Tour market provides opportunity for specialty FIT / small group experiences and larger coach / bus groups primarily focused on urban destinations and attractions.

7 MEETINGS AND CONVENTIONS AND SPORTS TOURISM

Although not currently a priority for OTMPC, meetings and Conventions and Sports Tourism will continue to be a priority for Gateway and Urban Communities. Business travellers represent an additional consumer opportunity to extend meeting stays for leisure activities, spousal programs and partnering with major city destinations for pre and post conference opportunities.
OPTIMIZE TRANSPORTATION

Given Northern Ontario’s vast geography and proximity to markets, both private vehicle and public transportation have been identified as an opportunity and a challenge.

Working in collaboration and partnership, Northern Ontario partners must:

1. Embrace the distances where markets and consumers will see distance as an adventure, in particular by emphasizing the variety of experiences and landscapes along highways and water routes;

2. Build upon the relationships with air carriers to develop new destinations, packages and reasons to visit and experience both urban and outdoor adventures in the North;

3. Promote primary and secondary highways as a touring opportunity, again by differentiating experiences along the various routes;

4. Support attraction based and passenger rail, ferries and intermodal services and encourage transportation governance bodies and private sector corporations to invest in enhanced transportation in the North; and

5. Support expansion of the variety and quality of Northern Ontario consumer experiences.
ENHANCE MEASUREMENT AND RETURN ON INVESTMENT

Measurement and Key Performance Indicators (KPI’s) are critical to understanding the success of marketing investments. As reservations systems and booking tools continue to be explored and adopted by DMO’s and regions and consumers use these systems to make purchases, Northern Ontario partners will be able to better attribute marketing effort with actual sales data.

Recommended Key Performance Indicators:

- **Web Traffic** - user sessions, page views, lead generation
- **Out Bound Links** - consumer traffic that leaves our sites or content
- **Online booking systems / Package sales** - where booking engines are available and packages are related to our marketing efforts we will measure and track
- **Social Interactions and Engagement** - using various tools to determine effectiveness
- **Operator Feedback** - whether by anecdotal comments / testimonials or surveys, seek out operator feedback and where possible, actual results

- **Consumer Shows**: Northern Ontario should be strategic when investing in consumers shows and develop strategies to assess results and support optimal consumer engagement and bookings.

- **Transactional Measures** - measure cost be click, cost per visit, cost per inquiry, cost per lead and return on investment

Other measurement considerations:

- **Base Line**: establish base line measures and then growth targets
- **Monitoring**: monitor and assess campaign / program performance when in market to make course corrections as required
- **Visitation**: monitor visitation and expenditure information (Statistics Canada) at Northern Ontario, regional levels and DMO’s when available to identify trends and challenges
- **Sales Data**: examine options to obtain actual annual sales information through confidential industry surveys or reporting. Also examine other sources for data such as HST information reported by industry segments.
IMPLEMENTATION OF THE NORTHERN TOURISM STRATEGIC DIRECTION

This Strategic Direction for Marketing Tourism in Northern Ontario provides a series of recommendations and foundational considerations. It is envisioned that each partner involved in marketing Northern Ontario will consider the key elements and strategic directions presented as they develop individual plans and that all partners will commit to collaborate and co-invest together.
APPENDIX – SUPPORTING RESEARCH AND STUDIES

The following appendix provides a listing of the research and strategies that have been taken into account in the creation of the Strategic Direction for Marketing Tourism in Northern Ontario.

Destination Canada: maintains research at a national level and the Explorer, industry resources and the Quotient (EQ) consumer segmentation.

http://en.destinationcanada.com/

1. Research: http://en.destinationcanada.com/research
2. Explorer Quotient: http://en.destinationcanada.com/resources-industry/explorer-quotient

Ministry of Tourism, Culture and Sport: undertakes province wide research that assisted in the development of the Strategic Direction including:

1. Regional Tourism Profiles for Regional Tourism Organizations 12 and 13a, 13 b and 13c
2. Current Industry Performance
3. Tourism Outlook

These reports can be found at:

Tourism Northern Ontario maintains a comprehensive resource library at http://tourismnorthernontario.com (Find Resources).

The library includes:

1. A comprehensive series of tourism sector research documents
2. The Northern Ontario Tourism Product Development Strategy
3. 2012 Digital Marketing Strategy

Ontario Tourism Marketing Partnership maintains its consumer website at www.ontariotravel.net and a business to business web site at https://www.tourismpartners.com which provides the tourism industry with strategies, partnership opportunities and resources. The following resources have supported the development of the Strategic Direction:

1. Traveller Segment Profiles:
   a. Connected Explorers Segmentation
   b. Up and Coming Explorers Segmentation
   c. Knowledge Seekers Segmentation
   d. Nature Lovers Segmentation
2. OTMPC 2016-2017 Marketing Strategy
3. OTMPC Brand Tool Kit