

# Premier-Ranked Tourist Destination Final Report North of Superior Tourism Region



## *A Vision for our Region*



- Municipality of Oliver/Paipoonge • Township of Shuniah • Township of Nipigon
- Township of Red Rock • Municipality of Neening • Township of Marathon

# **PREMIER-RANKED TOURIST DESTINATION FINAL REPORT**

**Prepared for:**

North of Superior region

**Prepared by:**

Patricia Forrest, Forrest Marketing + Communications

**With the assistance of the PRTD Team:**

Nyomie Ray, Project Coordinator

Bruce Fallen, North of Superior Tourism Association

Paul Pepe, City of Thunder Bay

Paul Samson, Ontario Ministry of Tourism

**Funded by:**

Proponents: City of Thunder Bay and North of Superior Tourism Association

Ontario Ministry of Tourism

Industry Canada - FedNor

Northern Ontario Heritage Fund Corporation

Thunder Bay Ventures

Employment Ontario

Ontario Ministry of Natural Resources - Ontario Parks

Municipality of Oliver/Paipoonge

Township of Shuniah

Township of Nipigon

Township of Red Rock

Municipality of Neebing

Township of Marathon

*A special thanks to the tourism operators across the North of Superior region who met with the PRTD researchers, to the many visitors who took time out of their trip to fill out our surveys and to the establishments across the region who made the visitor surveys available.*

*Thanks as well to those who participated in our focus group sessions to develop recommendations during the busy 2008 summer tourist season.*

# TABLE OF CONTENTS

---

<b>EXECUTIVE SUMMARY</b> .....	3-12
INTRODUCTION .....	13
About the Premier Ranked Tourist Destination Process .....	13
Why Undertake the Process? .....	14
Methodology .....	15
Regional Profile .....	18
<b>PRODUCT DIMENSION</b> .....	20-48
ELEMENT 1: DISTINCTIVE CORE AND SUPPORTING ATTRACTIONS .....	20
Natural Core Attractions .....	20
Built/Managed Core Attractions .....	22
Natural Supporting Attractions .....	25
Built/Managed Supporting Attractions .....	25
Emerging Attractions .....	26
North of Superior's Competitive Position .....	30
North of Superior Tourism Association's Positioning Statements .....	33
Demand Generators Chart .....	34
Product Opportunities Chart .....	36
ELEMENT 2: QUALITY AND CRITICAL MASS .....	38
ELEMENT 3: SATISFACTION AND VALUE .....	46
ELEMENT 4: ACCESSIBILITY .....	47
ELEMENT 5: ACCOMMODATIONS BASE .....	48
<b>PERFORMANCE DIMENSION</b> .....	49-52
ELEMENT 1: VISITATION .....	49
ELEMENT 2: OCCUPANCY AND YIELD .....	50
ELEMENT 3: CRITICAL ACCLAIM .....	51
<b>FUTURITY DIMENSION</b> .....	53-61
ELEMENT 1: DESTINATION MARKETING .....	53
ELEMENT 2: PRODUCT RENEWAL .....	57
ELEMENT 3: MANAGING WITHIN CARRYING CAPACITIES .....	59
<b>CONCLUSIONS</b> .....	62-86
PERFORMANCE SUMMARY .....	62
SUMMARY OF FINDINGS .....	64
RECOMMENDATIONS .....	68
FUTURE DIRECTION .....	72
IMPLEMENTATION AND TIMELINES .....	80

## **APPENDICES**

---

Appendix A: Regional Tourism Profiles – Emerging Attractions/Upcoming Developments .....	88
Appendix B: Traveller Profile – Information Collected from 484 Regional Visitor Surveys .....	93
Appendix C: Geraldton Community Forest – Cultural Mapping Information .....	102
Appendix D: City of Thunder Bay – Cultural Mapping Information .....	104
Appendix E: An Analysis of Aboriginal Tourism in the North of Superior region .....	105
Appendix F: An Analysis of Aboriginal Tourism in the North of Superior region (Ojibway, Syllabics) .....	109
Appendix G: Ontario Parks Report .....	117
Appendix H: Transportation and Travel Trade Checklist .....	122
Appendix I: City of Thunder Bay – Sport Tourism Survey Results .....	125
Appendix J: Resource Group Steering Committee Members and Sectoral Committee Members .....	130
Appendix K: Acknowledgments .....	134
Appendix L: Glossary of Terms and Acronyms .....	136



## EXECUTIVE SUMMARY

---

The Premier Ranked Tourist Destination Process was developed by the Ontario Ministry of Tourism, Culture and Recreation to help tourism destinations evaluate themselves and determine what their potential is within the tourism marketplace. In the North of Superior region, the PRTD Partnership (Tourism Thunder Bay and North of Superior Tourism Association - NOSTA) viewed the Process as an opportunity to gather and assess the information that is necessary to provide a solid foundation for tourism growth.

Through this Process, communities and regions are evaluated in three dimensions, following the steps and questions detailed in the PRTD Workbook. The aspects within each dimension to be evaluated are:

<b>Dimension</b>	<b>Aspects to be Evaluated</b>
Product	A. Distinctive Core Attractions B. Quality and Critical Mass C. Satisfaction and Value D. Accessibility E. An Accommodations Base
Performance	F. Visitation G. Occupancy and Yield H. Critical Acclaim
Futurity	I. Destination Marketing J. Product Renewal K. Managing within Carrying Capacities

The Process was undertaken in five sequential steps:

1. Database Design and Collection  
In total, 513 sector surveys, along with 62 sport tourism surveys (within the City of Thunder Bay) were completed. In addition, 484 visitor surveys were conducted.
2. Data Organization
3. Evaluation of the "Product, Performance and Futurity" Dimensions
4. Completion of the Destination Performance Summary
5. Preparation and Presentation of Draft and Final Reports

The North of Superior Tourism Region can be roughly defined as the area bordered on the North of the Albany River, on the South by the Canada-United States border, on the West by Highway 599 and Quetico Park and on the East by the District of Algoma. This region is located in the Northwest part of the province and is one of the largest tourism regions in Ontario, encompassing some 155,000 square kilometers.

Tourism is an important contributor to the economy of the North of Superior region. In 2004, its impact in Northwestern Ontario was as follows<sup>1</sup>:

Total visitor spending	\$696,761,000
GDP contribution	\$509,350,000
Labour income	\$264,607,000
Jobs	9,439
Total taxes	\$310,393,000
Municipal taxes	\$ 16,151,000

---

<sup>1</sup> An Overview of Tourism in Northern Ontario, FedNor, 2004

\*Source of data contained in the Executive Summary are cited in the full version of the report.

Between 1998 and 2006, person visits by U.S. residents to the North of Superior region decreased by 49%. Of these visitors and the 5,581 that came from other countries, 160,773 or 58% stayed in the area for one or more nights and the balance, 115,579 or 42%, made a same-day visit to the region.

Of the 160,773 overnight visitors to the region, 118,015 (73%) were on pleasure trips, 20,716 (13%) were travelling to visit friends and relatives, 5,933 (4%) were on a business trip and 16,109 (10%) were travelling for other reasons. 22% of all the region's non-domestic visitors came from Minnesota, with 17% coming from Wisconsin and 6% from Michigan. Other U.S. non-border states represented a further 45% of all non-domestic visitors.

## **PRODUCT DIMENSION**

The **Product Dimension** of the PRTD Process is designed to identify and assess the tourism experience of a destination.

### **Element 1: Distinctive Core and Supporting Attractions**

A Core Attraction must meet at least two of the following criteria:

- It must have a significant number of visitors annually
- It must have a physical and/or historical link to the destination
- It must be a destination landmark
- It must have a clear "pull factor" outside the local area

The North of Superior region has a number of both natural and built/managed **Core Attractions**. The most significant Core Attractions were determined to be fishing, hunting, snowmobiling and canoeing/kayaking.

**Supporting Attractions** are facilities or other features that draw visitors to an area by giving them further reasons to travel there. Supporting Attractions may be primary travel motivators to some niche markets but generally they serve as an enhancement to Core Attractions. The region's Supporting Attractions include "other" outdoor activities such as snowshoeing, nature observation, skiing, bird watching and golfing, water activities such as boating and swimming, historic/cultural sites, museums and galleries, the Casino and unique gift shops.

The region's emerging tourism products include Aboriginal and Sport tourism, the Thunder Bay waterfront development, the Lake Superior National Marine Conservation Area, motorcycle touring, festivals and events, a variety of regional tourism developments and cultural mapping projects in Thunder Bay and Greenstone.

The following is a summary of the findings with respect to the region's **Core and Supporting Attractions**:

- The region has numerous appealing natural and built/managed Core Attractions catering to all market segments and offering, to some degree, year-round experiences. All of the Core Attractions are linked physically or historically to the region.
- The region's Supporting Attractions complement the Core Attractions and offer opportunities for supporting the development of packages and themed routes.
- Weaknesses in the Core Attractions base include the absence of a Core Attraction in the region itself (outside of Thunder Bay) and a lack of products that can attract visitors in the winter season.
- Key opportunities include the development of more festivals and events including Aboriginal festivals and Pow wows as well as the opportunity to develop more learning experiences to complement and extend visits.

*"We have the Aboriginal component as an asset. We should look at what we have that is unique and accessible."*

**-Tourist Operator**

The region's key competitors include Sault Ste. Marie, Eastern Manitoba, Grand Marais, Duluth and Lutsen/Tofte, Minnesota, the Boundary Waters Canoe Area and Sunset Country. The region has a number of advantages over these competitors and these advantages need to be highlighted. This differentiation can be guided by the region's positioning statements which are as follows:

- a) At the centre of Canada on the largest fresh water lake in the world, North of Superior invites you to experience a unique wilderness adventure. Whether climbing the Sleeping Giant or gazing at the Northern Lights, we offer you a true taste of everything great in Ontario.
- b) North of Superior is a vast wilderness area offering unique and spectacular lake and land touring routes, eco-adventures and world-class fishing and hunting. Get close to nature, to your past and to each other. Come into our great outdoors. Catch our Northern Spirit and soothe your soul.
- c) The region of North of Superior offers the most spectacular, awe-inspiring touring opportunities in Northern Ontario, including driving routes and activity-filled itineraries. Touring drivers and avid outdoor adventurers can see and experience majestic Lake Superior, unique attractions and rugged wilderness.

A relatively low percentage of visitors who were surveyed for this report learned about the region on the Internet. Since 69% of Canadian travellers and 75% of American travellers who visited Northern Ontario in 2007 planned their trips on the Internet<sup>2</sup>, this is a significant issue. NOSTA will focus increasingly on the Internet as a marketing tool and will implement a new web site along with an e-marketing program.

The majority of travellers to the region (44%) visit during the summer months, followed by those who visit in the spring (24%). Numerous opportunities to extend visitation into the shoulder season were identified. These include developing the region's bird watching and ice climbing products and GIS/GPS touring.

## Element 2: Quality and Critical Mass

The issues of **quality and critical mass** address the extent to which the North of Superior region provides a memorable experience by offering a broad range of options for engaging in core and related activities and entertainment, shopping and dining. The key findings with respect to **quality and critical mass** were:

- Only 26.8% of respondents offer packages.
- By far the greatest percentage of visitors (65.9%) stays longer than a day.
- The region offers a range of memorable experiences, creating core and on-theme activities sufficient to sustain tourist interest on a year-round basis, though primarily in the spring and summer months.
- While the region offers a range of dining options, most of the higher-end experiences are located within Thunder Bay.
- The region has a number of accredited chefs, however, offering some possibilities to expand the dining offerings.
- Cultural experiences are more equitably distributed throughout the region.
- Operators primarily offer "relaxation" but are less inclined to provide opportunities for learning.
- The region offers a range of shopping options from discount/bargain to high end, at a variety of price points.

*"Locals must be aware of what area has to offer."*

**-Tourist Operator**

<sup>2</sup> TAMS, Ontario Ministry of Tourism, 2007

### Element 3: Satisfaction and Value

This element documents the extent to which the destination offers its guests:

- a welcome
- satisfied expectations and
- value for money

It also investigates what the destination is doing to enhance its performance in these areas.

The key findings regarding **satisfaction and value** were:

- 98.2% of visitors said that they found the region to be hospitable and friendly.
- Only 38.1% of the 513 businesses surveyed offer customer comment or guest survey cards.
- Key experience and service prices have been monitored and are primarily staying constant.
- Visitation over the same period of time has been tracking downwards.
- Today's consumers are increasingly demanding quality and demonstrated value. Because North of Superior is more expensive to get to than many other destinations, marketers need to be clear about the value proposition offered to the target markets, emphasizing what is unique and most appealing.

### Element 4: Accessibility

The **Accessibility** element assesses:

- the ease of getting to the destination
- the transportation modes that serve it
- the waterfront communities' "friendliness" to cruise ships or boat passengers
- the recognition given to the importance of transportation to the tourist experience

The key findings regarding **accessibility** were:

- While vast and remote, the region's position at the centre of Canada offers opportunities to entice those on a cross-country trip to visit.
- None of the communities in the region including Thunder Bay is within a three hour drive of any major population centre, with the nearest large urban area of Minneapolis-St. Paul being about a six hour drive away from Thunder Bay.
- While many of the region's smaller communities and municipalities are within a three hour drive of Thunder Bay (population 109,141), this market is not extensive, with populations ranging from 70-3000 people.
- The majority of travel to and through the region is by automobile.
- The region's numerous waterfront locations are key strengths to be capitalized upon.
- Thunder Bay offers both a U.S. border crossing less than an hour south of the City as well as an international airport within the City limits. Few of the region's other communities, however, are within a two hour drive of the border crossing and international airport.
- 91.8% of visitors feel that it is easy to travel within the region. Of those who had concerns about travel in the region, comments tended to center around the following issues:
  - Delays due to highway and related construction
  - Not enough (or in many cases not clean enough) rest stops / pull over areas / washrooms
  - Not enough paved areas for bicycling
  - Inadequate number of passing lanes



- Lack of four-laned highways
- Lack of chain accommodations
- Lack of travel centres or not enough travel centres open later

Further steps could be taken to make access to the region and its attractions more visitor-friendly. For example, the region's airports need to be better utilized to deliver the North of Superior marketing message. The larger issues such as the lack of four-laning and passing lanes and inadequate signage have been identified in numerous other reports and need to be addressed.

### **Element 5: Accommodations Base**

- the range of accommodation classes available
- the range of locations available and
- the presence of higher end operators

The key findings regarding **accommodations** were:

- The region offers a range of accommodations options but most of the higher-end establishments are found within the City of Thunder Bay.
- The region is also lacking in chain style accommodations along travel corridors but these "branded" (broadly known and respected) higher-end establishments are more widely available in Thunder Bay.



*Terry Fox Monument & Tourist Information Centre*

## PERFORMANCE DIMENSION

The **Performance Dimension** is the second of the three dimensions. The purpose of this stage of the process is to evaluate various aspects of the region's strength in the marketplace, along with its reputation.

### Element 1: Visitation

The **Visitation** element assesses the destination's market performance in terms of:

- its visitation numbers and market shares
- its attractiveness to different market segments
- its attractiveness over the four seasons of the year

The following were the key findings regarding **visitation**:

- The region does not attract a significant share of the total visits to Ontario which included activities relying on the destination's core attractions classes. The total visits to the North of Superior region in 2004 were 1.4% of the Ontario total of 94,227,829. This is due to a number of factors, including the region's isolation from major population centres.
- The region is, however, an important component of what Ontario can promote to potential visitors, offering authentic outdoor and cultural experiences.
- The majority of the visitors to the North of Superior region in 2004 were from Ontario, accounting for 67% of the total visitation to the area that year. U.S. visitors accounted for 24% and visitors from other Canadian provinces accounted for 8%.
- The top five markets to visit the region were Thunder Bay District (49%), Minnesota (7%), Michigan (5%), Wisconsin (3%) and York Regional Municipality.
- Business visitors to the region in 2004 contributed 4% of the total visitation. While Thunder Bay currently attracts significant numbers of meetings and conventions and is attempting to capture more with a focused strategy, the region lacks the capacity to host many of these types of events.
- The region's offering draws from multiple market segments, attracting visitors with different visitor profiles.
- While the region is a four-season destination to some extent, visitors are most likely to arrive in the summer months (44%).

### Element 2: Occupancy and Yield

The **Occupancy and Yield** element assesses the destination's market performance in terms of:

- accommodations base occupancy
- guest expenditure levels

The destination's occupancy and expenditure performance is compared to norms, provincial averages and the destination's share of visitation. The following were the key findings regarding **occupancy and yield**:

- Guest visits and expenditures make a net positive and significant contribution to the economy of the North of Superior region. Same-day and overnight visitors spent \$232,107,899 in the North of Superior Region on tourism related expenditures/categories including lodging, food and beverage, transportation, entertainment and retail during 2006.

*"There is no shortage of regional attractions."*  
-Tourist Operator

- Spending by both overnight visitors and day trippers is higher than the provincial average. Spending by those on day trips in the region in 2006, for example, was \$183.87 compared to \$97.18 for the province.
- Total spending is, however, much lower than the provincial total. Total visitor spending in the region in 2006 was \$232,107,899 compared to \$17,694,051,216 for the province.

### Element 3: Critical Acclaim

The **Critical Acclaim** element addresses the extent to which the destination is recognized as:

- "must see/must do" on general grounds or those more specific to a given type of experience
- having a profile that contributes to the attractiveness of Ontario and Canada as a destination
- a top-ranked place to visit

The following were the key findings regarding **critical acclaim**:

- Northwestern Ontario (and to a somewhat lesser extent the North of Superior region) has long been considered a "must see / must do" location for fishing and hunting products.
- The region has also gained recognition through the Lake Superior Circle Tour. In addition, Lake Superior itself is a widely-recognized icon as the world's largest freshwater lake and the home of the legendary Sleeping Giant, a People's Choice Winner in the CBC's recent Seven Wonders of Canada contest.
- Destination imagery of and/or text about the North of Superior region or its Core Attraction(s) is used in promoting Ontario.
- The Canadian Tourism Commission does not list any Northern Ontario experiences in its "Top Things to do in Ontario" section and does not, in fact, appear to discuss Northern Ontario anywhere on its web site.
- Two of the region's attractions, Fort William Historical Park (Thunder Bay) and Amethyst Mine Panorama (Dorion) have been ranked "Best in Class" or "Top Tier" in consumer or industry rankings.

*"You have unique attractions that can't be found anywhere else."*  
-Visitor



## **FUTURITY DIMENSION**

The purpose of the **Futurity Dimension** is to examine the ways in which the region and its stakeholders are investing in the future. Issues such as marketing, investment and capacities are examined.

### **Element 1: Destination Marketing**

The **Destination Marketing** element identifies the extent to which the destination:

- targets viable markets
- invests in managing and promoting its tourism marketplace
- consults with the travel trade operators and agents serving area visitors and residents

The following were the key findings:

- Visitors say the region has many strengths including:
  - Natural beauty, Sleeping Giant, landscapes, scenery, nature, outdoors, forests, Lake Superior
  - Fishing/hunting
  - Aboriginal culture
  - Outdoor recreation
  - Snowmobiling
- Travel to the region has recently been declining but future demand for Northern Ontario products has been predicted in several reports.
- The regional DMO is North of Superior Tourism Association, funded at a level of \$450,000 with about 45% allocated towards Marketing/Communications.
- North of Superior Tourism Association is currently finalizing its 2009-2011 Regional Strategic Business Plan and Marketing Plan. The focus of this plan is primarily on marketing, tracking and membership recruitment.
- There are also numerous municipal DMOs in the region including Tourism Thunder Bay.
- In order to assess the progress of the marketing plan, NOSTA has established a marketing measurement system.
- 68% of tourism operators in the North of Superior region provide customer service training programs.

### **Element 2: Product Renewal**

The **Product Renewal** element assesses the extent to which the destination is making capital investments in its attractiveness into the future.

The key findings regarding **product renewal** were:

- 33.5% of the businesses who responded to the survey reported that their business had decreased but considerable reinvestment and new investment is nonetheless still occurring in the region to enhance, revitalize or develop facilities relevant to the quality of the tourist experience.
- The largest percentage had invested between \$10,000 and \$50,000 in the last two years.
- A considerable number (8.1% and 11.3% respectively) had invested over one million dollars.
- There are numerous examples both in Thunder Bay and the region of the Core Attractions making investments to enhance their appeal to visitors and their ability to attract new visitors.

*"Tourism is more sustainable than forestry."*  
-Tourist Operator

### Element 3: Managing within Carrying Capacities

The **Managing within Carrying Capacities** element assesses the extent to which the destination is aware of and manages within the capacity thresholds of its:

- local economy
- ecosystems setting and soft services infrastructure
- guests' satisfaction levels
- hard services infrastructure

The key findings regarding the region's **capacity** were:

- 66.3% of all tourism operators surveyed said that they have enough of a trained labor pool to support their business over the longer term.
- Guest surveys confirm satisfaction with hospitality and service, with 98.2% of visitors surveyed assessed the region as being "hospitable and friendly".
- Carrying capacities of the natural systems that sustain local ecosystems and quality of life are not overwhelmed by destination visitation particularly in light of the fact that visitation has been in decline recently.
- In addition, it is widely believed there are no current issues around water treatment and delivery, sewage treatment and trunk and road, transit (where offered), parking and trail capacity to accommodate current and projected levels of visitation, at least in the short to mid-term.
- Overall overcrowding, overuse, diminished quality of the environment or diminished quality of the guest experience are not being raised as issues by guests surveys or by managers of facilities and resources.
- Visitors to the region have expressed concerns about some aspects of the region's infrastructure including roads and rest stops.
- There is considerable political will throughout Northwestern Ontario, including the North of Superior Region, to develop tourism. This is evidenced by the recent creation of the Northwestern Ontario Regional Tourism Council under the Northwestern Ontario Common Voice Initiative.

### Conclusion

Through the Premier Ranked Tourist Destination Process for the North of Superior region, an extensive profile of the region's tourism industry has been developed. This profile should be able to serve a very useful role in regional tourism planning well into the future.

The process identified gaps and weaknesses through the three dimensions while at the same time pinpointing specific strengths and opportunities. Initial meetings conducted around the findings of the Draft Report were successful in identifying numerous ways to address the region's gaps while making the most of its strengths.

With respect to overall ranking, while the North of Superior region did receive a "Yes" in both the Product and Futurity dimensions, it was given an "Almost" in the Performance dimension due to issues around visitation, occupancy and yield. As well, a number of weaknesses to be addressed were identified in the Product and Futurity Dimensions. Recommended steps to address the weaknesses that have been identified are contained in the "Future Direction" section of this Report.

***"Businesses need to work together more."***  
**-Tourist Operator**



*Sleeping Giant Provincial Park*

## **INTRODUCTION**

---

### **About the Premier-Ranked Tourist Destination Process**

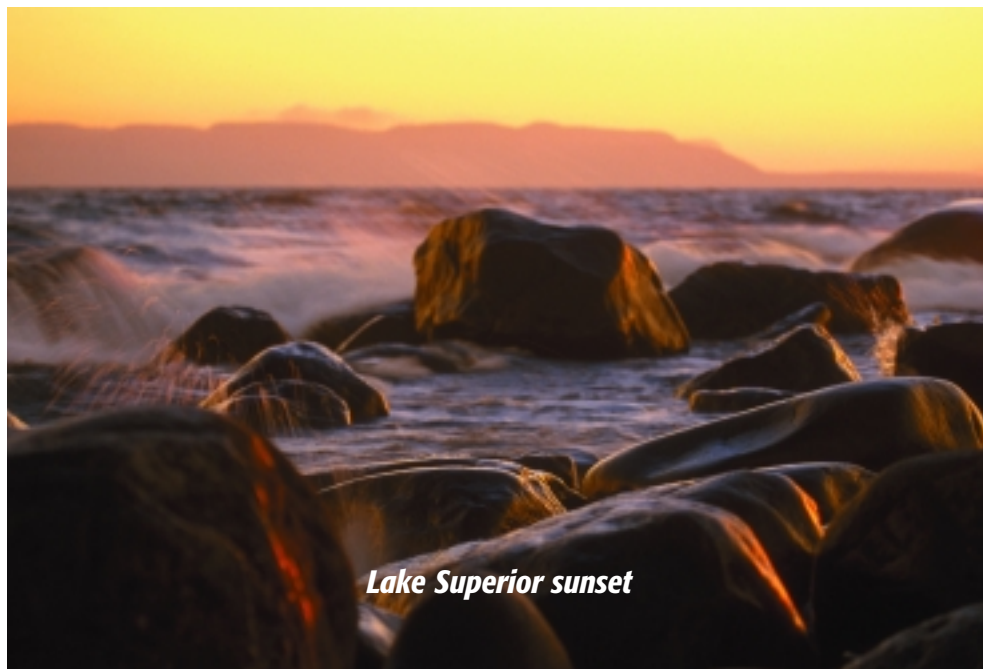
The Premier-Ranked Tourism Destination Process (PRTD Process) is an innovative tool that was developed by the Ontario Ministry of Tourism, Culture and Recreation to enable destinations to assess themselves in an objective manner in the tourism marketplace and to assist them in determining what their potential may be to enhance their position in the future.

In the North of Superior region, the PRTD Partnership (Tourism Thunder Bay and North of Superior Tourism Association - NOSTA) viewed the Process as an opportunity to gather and assess the information that is necessary to provide a solid foundation for tourism growth. The Partnership's specific goals were to:

- Assess destination strengths and weaknesses and to compare to other destinations
- Help establish goals, objectives and priorities to build the regional tourism sector
- Identify gaps and opportunities and examine ways to address these issues
- Understand what the region has to offer and to whom it should be marketing
- Establish a baseline for a regional tourism strategic plan

*"More emphasis needed on region's hidden secrets."*

**-Visitor**



*"Must think outside the box."*

**-Tourist Operator**

Through the Premier Ranked Process, communities and regions are evaluated in three dimensions, following the steps and questions detailed in the PRTD Workbook:

<p><b>THE PRODUCT DIMENSION</b></p>	<p><b><i>A Premier-Ranked Tourist Destination provides a high quality tourist experience, enabled through the destination's offerings of:</i></b></p> <ul style="list-style-type: none"> <li>A. Distinctive Core Attractions</li> <li>B. Quality and Critical Mass</li> <li>C. Satisfaction and Value</li> <li>D. Accessibility</li> <li>E. An Accommodations Base</li> </ul>
<p><b>THE PERFORMANCE DIMENSION</b></p>	<p><b><i>The quality of the tourist experience and the destination's success in providing it is validated by:</i></b></p> <ul style="list-style-type: none"> <li>F. Visitation</li> <li>G. Occupancy and Yield</li> <li>H. Critical Acclaim</li> </ul>
<p><b>THE FUTURITY DIMENSION</b></p>	<p><b><i>and sustained by:</i></b></p> <ul style="list-style-type: none"> <li>I. Destination Marketing</li> <li>J. Product Renewal</li> <li>K. Managing within Carrying Capacities</li> </ul>

### Why Undertake the Process?

As a tool to objectively measure the appeal and market-readiness of the North of Superior region as a tourism destination, the PRTD Process provides the means of taking the first steps towards strategic planning for the future development of the area's tourism industry. It is anticipated that the Process will give the information that is required to build a solid foundation for tourism growth and enhancement within the North of Superior region.

*"Our region does not need to be a huge glamorous tourist place, but rather we need to develop our ecotourism and be more creative and innovative with our resources."*

**-Tourist Operator**



## Methodology

The process was undertaken in five sequential steps:

### 1. Database Design and Data Collection:

- A database of approximately 700 tourism stakeholders was created, representing 10 sectors (Accommodations, Food and Beverage, Festivals and Events, Outfitters, Retail, Attractions, Parks and Trails, Tours and Excursions - including Travel Agents, Transportation and Marinas).
- Sports tourism surveys were also created to provide some information to assist the City of Thunder Bay Sports Bid Administrative Advisory Committee in the creation of a Sports Bid Policy and Plan for the City of Thunder Bay. A summary of the findings is contained in this report in Appendix I.
- A questionnaire was then distributed to these stakeholders via face to face interviews (majority), phone interviews, web links and faxes. Questions focused on what stakeholders believed were the region's tourism strengths, weaknesses, opportunities, threats and gaps, as well as information pertaining specifically to each individual business regarding product, performance and futurity of that individual establishment.
- In total, 513 sector surveys, along with 62 sports tourism surveys (within the City of Thunder Bay) were completed. In addition, 484 visitor surveys were conducted. A report on these visitor surveys can be found in Appendix B of this report. The additional sector surveys can be broken down as follows:

Accommodations	105
Food and Beverage	70
Festivals and Events	39
Outfitters	27
Retail	142
Attractions	71
Parks and Trails	27
Tours and Excursions (including Travel Agents)	13
Transportation	17
Marinas	2

*"Businesses need to coordinate, not compete."*

**-Tourist Operator**



*We don't tend to promote what we have as a region  
- we need to realize our potential as a tourist destination."*

**-Tourist Operator**

The communities that were involved in the Process were:

- Armstrong
- Aroland
- Beardmore
- Caramat
- Dorion
- English River
- Fort William First Nation
- Geraldton
- Gorham
- Heron Bay
- Hurkett
- Ignace
- Jellicoe
- Kaministiquia
- Kashabowie
- Lac Des Mille Lacs
- Lake Helen First Nation
- Longlac
- Manitouwadge
- Marathon
- Nakina
- Neebing
- Nipigon
- Nipigon East (including Schreiber, Rosspoint, Pays Plat First Nation)
- Nolalu
- Oliver Paipoonge (including Kakabeka Falls, Stanley, Murillo, Hymers, Lappe)
- Pass Lake
- Pearl
- Pic Moberg First Nation
- Pic River First Nation
- Red Rock
- Rocky Bay and MacDiarmid First Nation
- Shebandowan
- Shuniah
- South Gillies
- Terrace Bay (including Jackfish)
- Thunder Bay
- Upsala

*"A map of area with list of things to do in Thunder Bay and throughout rural areas would be a useful tool."*

**-Tourist Operator**



*Kakabeka Falls*



*Lac Des Mille Lacs*

*"Directions, street names complicated (Thunder Bay)."*

**-Tourist Operator**

Although not within the NOSTA region, both Quetico and Obatanga Parks were included in the survey due to their proximity and tourism value.

2. Data Organization

- Survey data was then entered into an online database, compiled and analyzed to complete the Tourism Resource/Opportunity Matrix and the Transportation Resources checklist

3. Evaluation of the "Product, Performance and Futurity" Dimensions

- Each of the 117 measures in the PRTD workbook were addressed
- The rationale and backup documentation were entered for the rating of each measure
- Additional primary research was conducted as necessary

4. Completion of the Destination Performance Summary

- A first draft of the Summary was prepared, based on the workbook measures
- Consultations were then held with tourism stakeholders to discuss findings and identify measures to address the issues
- The draft was then finalized, incorporating input from tourism stakeholders

5. Preparation and Presentation of Draft and Final Reports

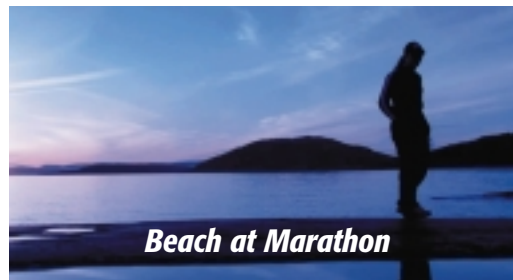
- Draft reports including individual Community Reports were presented to the PRTD Team
- Recommendations were created based on research through the PRTD Process, industry session findings and suggestions from tourism stakeholders. These recommendations can be found throughout the body of this report for the purpose of reflecting how they were developed and additionally they can found at the end of the report in the Summary of Recommendations section
- Consultation sessions were held on July 10th in Thunder Bay and on August 5th in Rocky Bay to share the findings of the Draft Report and to seek input into the recommendations. These sessions were attended by fifteen individuals, representing parks, attractions, economic development, community development, destination marketing organizations and FedNor
- Changes were made based on input
- Report was finalized and distributed

*"Open your stores!"*

**-Visitor**



*Intercity Shopping Centre*



*Beach at Marathon*

*"Challenge has been around forever in this area – we have a lot to offer but we have to be able to tie this all together."*

**-Tourist Operator**

## Regional Profile

The North of Superior Tourism Region can be roughly defined as the area bordered on the North by the Albany River, on the South by the Canada-United States border, on the West by Highway 599 and Quetico Park and on the East by the District of Algoma. This region is located in the Northwest part of the province and is one of the largest tourism regions in Ontario, encompassing some 155,000 square kilometers.



### **North of Superior Region**

© North of Superior Tourism Association

Tourism is an important contributor to the economy of the North of Superior region. In 2004, its impact in Northwestern Ontario was as follows<sup>3</sup>:

Total visitor spending	\$696,761,000
GDP contribution	\$509,350,000
Labour income	\$264,607,000
Jobs	9,439
Total taxes	\$310,393,000
Municipal taxes	\$ 16,151,000

<sup>3</sup> An Overview of Tourism in Northern Ontario, FedNor, 2004

Between 1998 and 2006, person visits by U.S. residents to the North of Superior region decreased by 49%, from 531,675 to 270,503. Of these visitors and the 5,581 that came from other countries, 160,773 or 58% stayed in the area for one or more nights and the balance, 115,579, or 42%, made a same-day visit to the region.

Of the 160,773 overnight visitors to the region, 118,015 (73%) were on pleasure trips, 20,716 (13%) were travelling to visit friends and relatives, 5,933 (4%) were on a business trip and 16,109 (10%) were travelling for other reasons. 22% of all the region's non-domestic visitors came from Minnesota, with 17% coming from Wisconsin and 6% from Michigan. Other U.S. non-border states represented a further 45% of all non-domestic visitors.

The tourism operators who were surveyed during the PRTD Process indicated that their visitors came from the following geographic locations:

<b>Geographic Origin</b>	<b>Response Average</b>
Regional/Northwestern Ontario	63.53
Provincial, outside the Region	13.06
National, outside Ontario	9.52
United States, near/border States	15.34
United States, long haul	5.79
International	2.99

*"Develop an ATV trail system and market it like the Superior Snow Loop Challenge"*

**-Visitor**

*"This type of surveying should be done annually to track change."*

**-Tourist Operator**

*"Tourist information centers should be more visible and accessible."*

**-Tourist Operator**

*"Not enough restrooms and picnic areas close to the road."*

**-Visitor**

\*All statistics on this page (except chart) are from *Regional Tourism Profiles, International Travel Statistics (US and Overseas)*, Ontario Ministry of Tourism, 2006

## PRODUCT DIMENSION

---

The Product Dimension of the PRTD Process is designed to identify and assess the tourism experience of a destination. The North of Superior region was assessed on the following Product Elements:

- Core and Supporting Attractions
- Quality and Critical Mass
- Satisfaction and Value
- Accessibility
- Accommodations Base

### Element 1: Distinctive Core and Supporting Attractions

For the purposes of the PRTD Process, a Core Attraction must meet at least two of the following criteria:

- It must have a significant number of visitors annually
- It must have a physical and/or historical link to the destination
- It must be a destination landmark
- It must have a clear "pull factor" outside the local area

The North of Superior region has a number of both natural and built/managed Core Attractions. The most significant Core Attractions were determined to be fishing, hunting, snowmobiling and canoeing/kayaking. The following is an assessment of the region's **Natural and Built/Managed Core Attractions**.

#### Natural Core Attractions

##### 1. Fishing

The North of Superior region is well known and promotes itself as a destination for world-class sport fishing for a variety of species with more lakes and rivers accessible to the serious or recreational angler than anywhere else in Ontario. In 2004, 42% of all visitors to Northwestern Ontario participated in fishing<sup>4</sup>. While tourism numbers overall have been declining somewhat in recent years, this still represents a substantial number of visitors. Both leisure and sport fishing product is offered throughout the entire region, including offshore, onshore, ice fishing and charters.

##### 2. Overnight Sightseeing Cruises

Although only two operators indicated that they offer overnight sightseeing cruises, the fact that visitors are booking in advance and travelling to the region to experience this product makes this a Core Attraction. Sail Superior operates out of Thunder Bay but offers excursions to various locations including the Nipigon River, Isle Royale, Rosspoint and the Slate Islands. Lake Superior Visits offers a Silver Islet excursion package and a Lake Superior fishing or sailing package, with overnight accommodation on shore. In 2004, 21% of visitors to Northwestern Ontario participated in a boating experience<sup>5</sup>.

##### 3. Canoeing/Kayaking

The North of Superior region has some of the finest outdoor wilderness canoeing areas in the world, including the Wabakimi Wilderness, Quetico Park, Pickle Lake, Greenstone, the Albany River and Lake Superior. Guided tours, rental equipment and maps are available in communities throughout the region. In 2005 and 2006, 18.15% of Americans and 25.4% of Canadians went hiking, climbing or paddling in Ontario<sup>6</sup>.

---

<sup>4</sup> *An Overview of Tourism in Northern Ontario*, FedNor, 2004

<sup>5</sup> TAMS, Ontario Ministry of Tourism, 2007

<sup>6</sup> *An Overview of Tourism in Northern Ontario*, FedNor, 2004

#### 4. Hunting

While only 3% of all visitors to the Northwestern Ontario region participated in hunting in 2004<sup>7</sup>, the North of Superior region is nonetheless well known for an excellent hunting product including big and small game and waterfowl hunting.

#### 5. Wilderness Trails

The region has an abundance of wilderness trails offered through Municipalities, privately owned businesses and Provincial and National Parks. Located throughout the region, these trails offer opportunities to participate in such activities as:

- Photography
- Wildlife viewing
- Flower/plant viewing
- Bird watching
- Other nature observation

Eight businesses in the region reported that they offer wilderness hiking as a primary focus.

#### 6. Day Hiking

As is the case with the region's wilderness trails, the numerous hiking trails located throughout the area offer opportunities for exercise, photography and nature observation. Trails are well maintained and others are in the developmental stages. 20 regional tourism businesses indicated that day hiking is a primary activity.

#### 7. Snowmobiling

A total of 18 groomed snowmobile trails are offered in the North of Superior region by the Ontario Federation of Snowmobile Clubs (OFSC) in the following locations:

- Beardmore
- Nipigon Area
- Dorion
- Geraldton
- Hornepayne
- Kakabeka Falls
- Longlac
- Manitouwadge
- Marathon
- Nakina
- Nipigon
- Red Rock
- Rosport
- Schreiber
- Shabaqua
- Terrace Bay
- Thunder Bay
- White River



***Superior Snow Challenge Loop at Marathon***

<sup>7</sup> An Overview of Tourism in Northern Ontario, FedNor, 2004

The Ontario Tourism Marketing Partnership Corporation (OTMPC) includes snowmobiling in Ontario's "best-in class signature experiences". In addition to attracting individuals (mostly males over 35 and families), there are also numerous poker runs in the region which attract groups. While some trail linkages are still missing, the North of Superior region's snowmobile product is well promoted by both the OFSC and the North of Superior Snowmobile Association (NOSSA). In 2005 and 2006, 8.4% of Canadians and 5.5 % of Americans went snowmobiling or ATVing in Ontario<sup>8</sup>.

---

*Recommendation One/Product/Snowmobile Trail Development:*

*That NOSSA, with the appropriate partners, seek funding to complete all missing trail linkages within the North of Superior region.*

---

## 8. Ice Climbing

Occurring mainly in Orient Bay and promoted during Nipigon's Ice Fest, ice climbing is a somewhat unique activity that brings visitors to this part of the region during the off-season.

## 9. Nature Observation

The North of Superior region is situated in and around nature. As such, nature observation anywhere in the region is abundant. Nature observation activities include bird watching, wildlife viewing (on land or on water) and flower/plant viewing. In 2005 and 2006, 26.9% of Americans and 30.7% of Canadians participated in wildlife viewing while on a trip to Ontario<sup>9</sup>.

## 10. Lake Superior Scenic Drive– Along Highway 11/17 and Highway 17.

The Lake Superior Circle Tour is comprised of five regions: Minnesota, Wisconsin, Michigan, Algoma Travel Region and the NOSTA region. The Lake Superior Scenic Drive in the NOSTA region offers some of the most spectacular scenery and vistas of the Tour. In total the drive encompasses about 2,100 kilometers. Touring is a key activity in the North of Superior region and the Lake Superior Circle Tour contributes significantly to the appeal of this product.

## Built/Managed Core Attractions

### 1. Parks

A variety of parks and campgrounds—private, provincial and national – are situated throughout the region, offering opportunities for overnight camping (including RV camping), sightseeing and recreation. The region's ten provincial parks include such high-profile sites as Sleeping Giant, Kakabeka Falls, Wabakimi and Neys. Pukaskwa National Park, on Lake Superior's North Shore, near the Town of Marathon is recognized as one of the most beautiful nature parks in Canada. Eleven Conservation Areas offer day-use experiences. In 2004, 17% of visitors to Northwestern Ontario visited a national or provincial nature park<sup>10</sup>.

The region's parks are clearly significant demand generators and offer potential for increased demand and use. In some cases, non-operating provincial parks have been taken over by municipalities. Increasing the number of these types of agreements would increase the region's offering of quality park experiences.

---

<sup>8</sup> TAMS, Ontario Ministry of Tourism, 2007

<sup>9</sup> TAMS, Ontario Ministry of Tourism, 2007

<sup>10</sup> *Interim Report #1: Discovery and Examination*, Malone Given Parsons



---

*Recommendation Two/Product/Non-operating parks:*

*That regional municipalities be encouraged to assume the operational responsibility for key non-operating parks in the region where practical.*

---

2. Provincial Heritage Site - Fort William Historical Park

The world's largest reconstructed fur trade post, Fort William Historical Park features over 42 outfitted historic buildings on an eight hectare site along with an interpretive centre, gift shop and dining areas. Through its living history program, the Fort depicts the fur trade activities of the North West Company at Fort William, inland headquarters and site of the Company's annual Rendezvous from 1803-1821. Since its opening in 1973, the Fort has played host to over two million visitors and today the living history program, combined with catering, special events and other partnership initiatives, attracts 100,000 visitors annually. The Fort was a recent winner of the Attractions Canada Award of Excellence. Visiting historical sites, museums and art galleries is a key activity among both Canadian and U.S. adult overnight travellers to Ontario, with 43.4% and 41.4% of them respectively participating in these activities during the trip<sup>11</sup>.

3. Aboriginal Pow wows/Celebrations

Pow wows and other Aboriginal festivals and celebrations are held throughout the entire Region within First Nations communities. Among the best known Pow wows in the region are those held at Fort William First Nation (Mount McKay), Lake Helen and Pays Plat. In 2005 and 2006, 8.6% of adult Canadians and 6.6% of adult Americans took part in an Aboriginal cultural experience while on an overnight visit to Ontario<sup>12</sup>.

4. Annual Music Festivals

Music festivals are also offered at various locations throughout the region. Blues Fest in Thunder Bay attracts some 8,000 visitors daily and Rock the Fort, held at Fort William Historical Park in 2005 and 2006, attracted 15,000 visitors daily. Live from the Rock Folk Festival, the Geraldton Jamboree and the Marathon Music Festival are also popular events. 24.4% of adult Canadians took in a musical concert, festival or attraction on an overnight visit to Ontario in 2005 and 2006. A further 6.5% of adult Americans attended a theatre, film or music festival on an overnight visit to the province and 11.8% of American visitors attended a rock concert or went dancing during this same period<sup>13</sup>.

5. Sporting Events/Tournaments

The City of Thunder Bay is increasing its focus on sports tourism in recognition of the economic impact that these types of events can have on the community and the region. The City will host the World Junior Baseball Championships in 2010. Some significant sporting events have also been held in the region, for example, the Kia Cup (curling) in Nipigon.

***"Provincial Parks are outrageously priced."***

**-Visitor**

---

<sup>11</sup> TAMS, Ontario Ministry of Tourism, 2007

<sup>12</sup> TAMS, Ontario Ministry of Tourism, 2007

<sup>13</sup> TAMS, Ontario Ministry of Tourism, 2007

## Recommendations – Core Attractions:

- While the region is lacking a second core attraction on a scale with Fort William Historical Park, many stakeholders do not believe that creating another major attraction is the answer—nor is this likely to happen in the foreseeable future. Rather it is recommended that the emphasis be placed on enhancing what already exists, including helping private sector destination resorts to upgrade to the level offered by some of the region’s competitors such as the Lutsen/Tofte area.
- 

### *Recommendation Three/Product/Funding:*

*Access to low cost loans seems to be an issue for tourism businesses in Northern Ontario. Further investigation should be undertaken to see why this is the case, what the roadblocks are and identify solutions that are attainable.*

---

- Packaging and bundling will also enhance the region’s critical mass of things to see and do. The OTMPC through its Northern Portal project is seeking the development of new packaged experiences through the NORTA’s and cities and towns. Many stakeholders believe that this will offer a heightened level of visibility for existing and new packages.
  - Increased alliances between regional communities and between these communities and First Nations communities is needed to develop new packages, touring routes, products and programming.
- 

### *Recommendation Four/Product/Packaging and Bundling (First Nations):*

*That packaging and bundling of products/experiences be further developed between tourist operators, regional communities and First Nations to enhance the region’s critical mass of things to see and do and therefore strengthening partnerships and alliances.*

---

### *Recommendation Five/Product/Packaging and Marketing:*

*Work with OTMPC Northern Portal project to package and market cultural products and experiences that are intrinsically linked to the region.*

---

- Development, maintenance and policing of snowmobile trails needs to be the responsibility of government rather than volunteers. Government receives revenue from the trails and should reinvest in them for this reason but also to support winter tourism.
- 

### *Recommendation Six/Product/Trail Maintenance and Policing:*

*That discussions be pursued with different levels of government to assume responsibility for the development, maintenance and policing of the region’s snowmobile trails.*

---

- The region needs mentors to encourage entrepreneurship and innovation
- 

### *Recommendation Seven/Product/Best Practices:*

*Feature success stories and best practices on the regional DMO (NOSTA) and other web sites.*

---

## Supporting Attractions

Supporting Attractions are facilities or other features that draw visitors to an area by giving them further reasons to travel there. Supporting Attractions may be primary travel motivators to some niche markets but generally they serve as an enhancement to Core Attractions.

### Natural Supporting Attractions

Based on the survey results along with the relative significance of their link to the core attractions, the region's Natural Supporting Attractions have been determined to be the following:

#### 1. Other Outdoor Activities

Additional outdoor activities that give visitors other reasons to travel to the region and/or serve as an enhancement to the core attractions include snowshoeing, skiing, nature observation and bird watching. These activities are available throughout the region. In 2004, 62% of all visitors to Ontario said that they participated in a sports or outdoor activity<sup>14</sup>.

#### 2. Golfing

The region has golf courses in many of its communities, the majority of which are nine-hole courses. The Thunder Bay area offers 11 golf courses with scenery ranging from rolling green hills to city centre park-like settings to the cliffs along the Nor'Wester Mountains. In Terrace Bay, a lakeside course with new clubhouse facilities offers views of Lake Superior as does the course at Marathon. Additional golfing opportunities are available in Manitouwadge, Nipigon and Geraldton. Some of the courses offer tournaments that attract visitors as well. 13.6% of adult Canadians and 8.6% of adult Americans golfed while on an overnight vacation in Ontario in 2005 and 2006<sup>15</sup>.

#### 3. Water Activities

Swimming and boating are popular activities among tourists in Ontario, with 16.2% of adult U.S. and 30.6% of adult Canadians having participated in either or both of these activities in 2005 and 2006 while on an overnight trip<sup>16</sup>. Docking facilities and marinas are located at Little Trout Bay, Thunder Bay, Silver Islet, Nipigon, Rosspoint, Terrace Bay and Marathon while beaches abound throughout the region.

### Built/Managed Supporting Attractions

The region's Built/Managed Supporting Attractions are:

#### 1. Historical/Cultural Sites, Museums/Galleries

In addition to Fort William Historical Park, some other historical/cultural sites, museums and galleries can be found in the region, including Founders' Museum and Pioneer Village near Thunder Bay along with the Thunder Bay Art Gallery and the Thunder Bay Museum plus numerous additional small museums and galleries located throughout the region. The region is also known for its amethyst mines. 14% of all visitors to Northwestern Ontario in 2004 visited a historic site<sup>17</sup>.

#### 2. Casino

The only casino in the region is the Thunder Bay Charity Casino located on the north side of the City near the waterfront. This casino offers a Northwestern Ontario-themed décor along with over 450 slot machines and an additional 15 table games. Group and hotel packages are offered. 19.3% of Canadians visited a casino during an overnight trip in 2005 and 2006<sup>18</sup>. The Thunder Bay Charity Casino, however, has been experiencing declining numbers in recent years.

---

<sup>14</sup> TAMS, Ontario Ministry of Tourism, 2007

<sup>15</sup> TAMS, Ontario Ministry of Tourism, 2007

<sup>16</sup> TAMS, Ontario Ministry of Tourism, 2007

<sup>17</sup> TAMS, Ontario Ministry of Tourism, 2007

<sup>18</sup> TAMS, Ontario Ministry of Tourism, 2007

### 3. Unique Gift Shops

Shopping for souvenirs and unique gifts is a very popular tourism activity. In 2005 and 2006, 60.4% of adult U.S. visitors to Ontario and 61.7% of Canadians reported enjoying shopping and dining. Of this total, 25.7% and 28.4% shopped for local arts and crafts<sup>19</sup>. Gift shops featuring local amethyst creations, Aboriginal arts and crafts and other locally made and unique items are located throughout the region.

---

*Recommendation Eight/Product/Touring Routes:*

*Develop touring routes such as Economuseum© routes (artisans and agri-food businesses), culturally and historically themed routes, etc.*

---

## Emerging Attractions

### 1. Aboriginal Tourism

A recent study of Aboriginal tourism in the North of Superior region has concluded that there are opportunities and potential in developing Aboriginal-based experiences and products. It was also determined that visitors considering the region for a vacation or getaway expect authentic Aboriginal experiences based on history, culture, take-away items and interaction with First Nations people on First Nations land.

The full report on developing Aboriginal tourism in the North of Superior region can be found in this report in Appendix E. See Appendix F for the Ojibway (syllabics) translation.

### 2. Sport Tourism

Sport tourism is any activity in which people are attracted to a particular location as a sport event participant, an event spectator, or to attend sport attractions or business meetings. In Canada, sport tourism generates \$2.4 billion annually<sup>20</sup>. The City of Thunder Bay, in recognition of the significant potential of sport tourism, has undertaken a process to develop a sport tourism strategy and policy.

The full report on sport tourism (based on PRTD research) can be found in this report in Appendix I.

### 3. Thunder Bay Waterfront

Thunder Bay recently announced its plans to develop a sizeable section of its waterfront in the Marina Park area. Aside from expanding green space, citizens and visitors will be able to enjoy a broad range of recreation activities year-round. Some of the highlights include: large public plazas, expanded trail systems, public piers, an improved festival site, public art, a children's boating area and splash pad, a skateboarding/BMX plaza and retail and dining opportunities. The mixed use development also includes plans for a significantly expanded marina basin, an upscale waterfront boutique, hotel accommodation and premium condominiums to encourage residents and visitors to live and stay in the downtown core, a necessary catalyst for downtown revitalization.

---

*Recommendation Nine/Product/Waterfront:*

*Consistent with promoting the City of Thunder Bay's historic and modern connection to Lake Superior and with respect to tourism values of well developed urban waterfronts, the sustainable development of Thunder Bay's waterfront with a mixed use plan based on solid public/private partnerships should continue to provide new recreational and economic benefits to the community. It should also serve to expand the range of activities necessary to retain visitors within the community for a longer period and therefore increase the economic impact of the tourism sector for the community and region. As such, it should be endorsed by the local and regional tourism industry.*

---

<sup>19</sup> TAMS, Ontario Ministry of Tourism, 2007

<sup>20</sup> Canadian Sport Tourism Alliance

#### 4. Lake Superior National Marine Conservation Area

In October, 2007, Prime Minister Stephen Harper announced the creation of Canada's newest national marine conservation area (NMCA), encompassing more than 10,000 square kilometers of Lake Superior, including the lakebed, islands and northshore lands within the NMCA boundaries. This area will become the largest freshwater marine protected area in the world.



© Parks Canada

#### **Map of the Lake Superior National Marine Conservation Area**

National marine conservation areas aim to balance the use and protection of the marine environment. Recreation, navigation and fishing activities are permitted within the NMCAs, while dumping, mining and oil and gas exploration and development are not permitted. Designation of a protected area generally leads to a higher profile in the marketplace. Parks Canada has made it known that it wishes to partner to make the conservation area operational.

An interim management advisory board comprised of representatives from adjacent communities, First Nations, and stakeholders has been formed to help Parks Canada develop an interim management plan to guide the first five years of operation.

*"Welcome to Lake Superior, and to its watershed. You are, in fact, at the heart of the North American continent, and this is the greatest expanse of freshwater on Earth. This year we have exciting news! If you are travelling east from Thunder Bay this season passing the Rossport Islands, you will be looking upon the largest protected area for freshwater in the world. After 15 years of hard work on the part of the people of the Canadian North Shore, Parks Canada and many others, the Lake Superior National Marine Conservation Area was signed into existence on October 25, 2007 by the Prime Minister of Canada in Nipigon. The establishment of the NMCA is an accomplishment that will have far-reaching, long-lasting benefits for Lake Superior as a whole, and life along the North Shore in particular."*

- Gary, Joanie and Sila McGuffin, Adventure Photojournalists and founders of the Lake Superior Conservancy and Watershed Council, [www.lscwc.org](http://www.lscwc.org)

## 5. Motorcycle Touring

A report – *Understanding and Attracting the Motorcycle Tourism Market to Northern Ontario* – was prepared in 2006 and details numerous opportunities to develop motorcycle touring routes and infrastructure throughout the region. Offering some of Northern Ontario’s most spectacular scenery, the North of Superior region is well positioned to capitalize on this growing market. The rising cost of fuel bodes even more favorably for the future of this market.

## 6. Festivals and Events

Festivals and events play an important role in tourism in Ontario. In 2005 and 2006, 28.0% (6,949,250) of adult Canadians and 31.7% of adult Americans (69,847,152) visited a fair or festival while on an out-of-town, overnight trip of one or more nights. In addition, 8.6% of Canadians and 6.6% of Americans took part in Aboriginal cultural experiences<sup>21</sup>. The lure of these activities for visitors offers a number of possibilities for the enhancement of tourism in the North of Superior region. Perhaps the product in this category offering the most potential is the development of more Aboriginal events including Pow wows.

## 7. Regional Community Tourism Developments

With downsizing and closures occurring in the forestry sector throughout the region, communities are increasingly turning to tourism as a potential economic generator. As such, numerous communities in the region have developed tourism plans, encompassing both development and marketing. Overviews of these communities’ plans can be found in this report in Appendix A. In addition, North of Superior Tourism Association’s new Strategic Business and Marketing Plan 2009-2011 is nearing completion. The plan sets out a specific positioning for NOSTA that emphasizes the importance of the touring product leading with Lake Superior and the region’s outdoor products, thereby focusing the marketing message.

## 8. Cultural Attractions – Thunder Bay

The City of Thunder Bay is currently undergoing a cultural mapping project by which every cultural asset within the city boundaries is being captured into a living inventory<sup>22</sup>. Those assets with location-based characteristics will then be pin-pointed onto a map. The map will be an interactive tool, available online so that anyone can see what cultural assets Thunder Bay has and details of each specific asset.

The cultural mapping database is split into seven categories which reflect the kinds of cultural assets present in Thunder Bay. This format is consistent with mapping projects undertaken in other municipalities. The categories are:

- Cultural Businesses
- Cultural Organizations
- Public Cultural Facilities
- Individual Artists & Cultural Professionals
- Public Art (publicly accessible)
- Festivals & Events
- Heritage

The seven categories of the cultural mapping project will be layered onto the existing City GIS map. It is envisioned that this map will be useful, among other purposes, for tourism activities such as developing heritage or arts walking tours based on the concentrations of assets identified on the map. The Cultural Mapping Report for the City of Thunder Bay can be found in Appendix D of this Report.

---

<sup>21</sup> TAMS, Ontario Ministry of Tourism, 2007

<sup>22</sup> Living Inventory – This inventory will not have a defined final product/completion date. It will continue to build and change over time as Thunder Bay does

9. Cultural Mapping – Geraldton

Through the Geraldton Cultural Mapping project, Northern Ontario businesses can put their business on a web site where users can search for accommodations, attractions, dining, indoor and outdoor recreation, services, and shopping destinations. The site is highly detailed with unique viewing options that show canoe routes, hiking trails, cross country ski trails, townships, snowmobile trails and wildlife management units. A more detailed report on this project can be found in Appendix C of this Report.

*Recommendation Ten/Product/Mapping:*

*Asset mapping projects, such as the ones being undertaken by the City of Thunder Bay and Geraldton Community Forest, along with the data collected through this process and in the recently published motorcycle and RV touring reports, offer opportunities to identify gaps and develop strategic plans. Extending the mapping of assets further into the region should therefore be considered a priority.*

*Recommendation Eleven/Product/Data Storage:*

*The PRTD Process data should be stored in a format that is easy to update and updated regularly, using a system such as Inmagic DBText, WebPublisher PRO.*

*Recommendation Twelve/Product/Aboriginal Tourism:*

*In light of the consumer demand for authentic products and in particular Aboriginal products, the recommendations contained in the Aboriginal Tourism Section of this report should be pursued.*



*Thunder Bay's Marina Park*

***"Get the waterfront done (Thunder Bay) and keep the character."  
-Tourist Operator***

## North of Superior's Competitive Position

As part of the PRTD analysis, the nearest competitors to the Region's core attractions were identified and evaluated. The North of Superior region's competing destinations were determined to be:

### Sault Ste. Marie, Ontario – 690 km East of Thunder Bay

While smaller than Thunder Bay with a population of about 75,000, Sault Ste. Marie is closer to both the U.S. border and larger markets such as Toronto. It offers many products that are similar to those that are promoted in the North of Superior region including fishing, boating, kayaking and hiking along with "City" experiences such as shopping, golfing and museums. The City of Sault Ste. Marie has a well-developed waterfront and is also known for the Agawa Canyon Tour Train.

### Sunset Country, Ontario – 128 km West of Thunder Bay

This travel region to the West of the North of Superior region promotes itself as "The Great Canadian Experience" and is especially well-known for its fishing and hunting products. The region offers over 70,000 fishable lakes and a wide variety of fishing options from fly-in outposts to canoe fishing and houseboat rentals. The region is also widely known as having some of the biggest moose, along with abundant bear and deer populations and excellent waterfowl hunting. The largest town in the region is Kenora with a population of 16,500.

### Duluth, Minnesota – 314 km South of Thunder Bay

In 2001, Duluth, Minnesota was rated in the Top Ten of "America's Greatest Outside Towns" by Outside Magazine, a national magazine targeting outdoor audiences. It is the only Midwestern community to achieve this ranking and is listed next to the likes of Santa Fe and Santa Barbara. Communities were selected based on close access to multiple outdoor activities, employment levels, housing markets and intact cultural identity. All towns featured had formal plans to maintain the above standards and create sustainable futures.

Slightly smaller than Thunder Bay in population, Duluth features over 105,000 acres of green space within city limits, 23 streams (12 of which have natural and fishable trout populations), over 20 miles of cross country ski trails, 900+ feet of vertical downhill skiing and is a gateway to Lake Superior's north shore. Located within a three hour drive time of the Twin Cities area, Duluth is known for its well-developed waterfront providing numerous access points to Lake Superior.

### Eastern Manitoba – 500 km + West of Thunder Bay

The Eastern Manitoba Region, encompassing the lands East of the Red River, Lake Winnipeg and the City of Winnipeg, offers tourists opportunities in agri tourism, eco tourism, white water rafting, canoeing, fishing, hunting and sporting opportunities. Many festivals in the region celebrate the ethnic origins of its residents.

The region is anchored by the City of Winnipeg (population 633,451)<sup>23</sup>. The city is a cultural centre and is the home of the Royal Winnipeg Ballet and the Winnipeg Symphony Orchestra. It boasts historic architecture, scenic waterways, a heritage river, numerous parks including Assiniboine Park, a well developed waterfront and distinctive neighbourhoods.

*"Signs of what you are looking for need to be updated or replaced."*

**-Visitor**

*"Taxes and fuel prices are too high."*

**-Tourist Operator**

<sup>23</sup> Statistics Canada 2006



Lutsen/Tofte, Minnesota – approximately 190 km South of Thunder Bay

The Lutsen/Tofte/Schroeder area is another popular U.S. Midwest destination. Sometimes promoted as a cluster called America's North Coast, the Lutsen/Tofte/Schroeder area offers year-round activities including fishing, hiking, skiing, snowshoeing, boating, golf and nature observation plus shopping, dining, entertainment and relaxation.

Boundary Waters Canoe Area Wilderness (BWCAW) – Northeastern Minnesota and Quetico Area, in Ontario's Sunset Country – Closest town: Ely, Minnesota (about 211 km from Thunder Bay).

An area known as "Canoe Country" consisting of the BWCAW and the Quetico Provincial Park of Ontario offers visitors access to more than two million acres of international border lakes that are interconnected by portages and canoe trails. Opportunities exist for canoeing, hiking, kayaking, fine freshwater fishing, winter camping, dog sledding, cross country skiing and snowshoeing. This is a popular and well-known tourism destination.

Grand Marais, Minnesota – 153 km from Thunder Bay

This small Northern Minnesota community offers a thriving arts culture, natural beauty, a wide range of accommodations and dining experiences, unique and quaint shops on the shores of Lake Superior and adjacent to vast expanses of wilderness. It is a very popular summer and fall destination for many residents of the Minneapolis/St. Paul area and from other U.S. locations seeking a nature experience.

A review of each competitor's web sites and the NOSTA site reveals striking similarities in what products are promoted. In light of this, care must be taken to ensure that NOSTA's unique products are highlighted. Participants in the PRTD Process believe that the North of Superior region is unique because of:

- Its untouched potential
- Its relaxing, slower paced lifestyle
- Five highways feeding directly into the Region
- Its position at the crossroads of Canada
- Over 500 miles of pristine Lake Superior shoreline



*Black Bay on Lake Superior*

*"Need better walking trails to attractions for handicapped persons."*

**-Visitor**

In addition, NOSTA's new Strategic Business and Marketing Plan 2009-2011 has identified the following competitive advantages:

UNIQUE ASPECT	PRODUCTS ENCOMPASSED	LEVEL OF DIFFERENTIATION FROM COMPETITION
Lake Superior as an Icon and a Wonder	Highway vistas, Circle Tour, trout and salmon fishing, beaches, hiking, etc.	Lake Superior's longest shoreline Circle Tour provides a somewhat packaged experience Better vistas and views Geography: more rugged and remote, more hills, wilder (wind, waves), pebble beach in Marathon Not a continuous look at the lake
Eco Tourism and Wilderness Parks	Canoe outfitting, Provincial parks, regional icons	Access points to the lake Icons include Wabakimi, Sleeping Giant and Lake Nipigon Place for soft experiences Historical waterways (First Nations and Francophone cultural connection); connection between the watershed and the Lake
Touring	Provincial parks, Circle Tour, regional icons, hiking	Diversity Quite unique from one end of the region to the other Many vistas to enjoy Many natural icons: Kakabeka Falls, Sleeping Giant, Ouimet Canyon
Critical Mass of Special/Unique Attractions	Terry Fox monument, amethyst mines, suspension bridge, strong regional icons (Kakabeka, Sleeping Giant etc.), Thunder Bay (Casino, Fort)	Tailor made for different types of activities Quality attractions With the City of Thunder Bay there is a servicing side available
Crossroads of Canada	All	Cannot be claimed by any competitors
Angling	Fishing lodges	Fly-in, Five-Star superior lodges Pigeon River Crossing Similar to competition, equally comparable Similar driving distance to Minneapolis
Hunting	Lodges	Plentiful, big black bears
Golfing	Various courses throughout region.	Each community has its own golf course Whitewater Golf Course is acclaimed Some courses designed by renowned course designers
Hiking		Not just hiking in the woods, many vistas and things to see
Range of winter activities	Snowmobiling, cross country skiing, downhill skiing, dog sled racing etc.	Extensive snowmobile and cross country skiing trail networks, downhill ski hills, dog sled excursions, ice climbing

While it is not known whether the region provides a better guest experience than its competitors, 98.2% of visitors surveyed said the region is hospitable and friendly and 93.1% identified the region's strengths. 67.2%, however, identified weaknesses.

---

*Recommendation Thirteen/Product/Positioning:*

*All of the region's competitors promote virtually the same products as the North of Superior region. It is recommended that those who promote the region clearly differentiate the North of Superior products, including communicating what there is to see and do beyond hunting and fishing.*

---

## **NOSTA Positioning Statements**

Creating a positioning statement helps to ensure that a destination's products and services occupy a distinct position in the minds of customers. A positioning statement should communicate key benefits, keeping in mind how competitors are positioned.

The 2009-2011 Strategic Business Plan and Marketing Plan is nearing completion. Three suggested positioning statements are contained in this document and are being considered by the NOSTA Board:

1. At the centre of Canada on the largest fresh water lake in the world, North of Superior invites you to experience a unique wilderness adventure. Whether climbing The Sleeping Giant or gazing at the Northern Lights, we offer you a true taste of everything great in Ontario.
2. North of Superior is a vast wilderness area offering unique and spectacular lake and land touring routes, eco-adventures and world-class fishing and hunting. Get close to nature, to your past and to each other. Come into our great outdoors. Catch our Northern Spirit and soothe your soul.
3. The region of North of Superior offers the most spectacular, awe-inspiring touring opportunities in Northern Ontario, including driving routes and activity-filled itineraries. Touring drivers and avid outdoor adventurers can see and experience majestic Lake Superior, unique attractions and rugged wilderness.

---

*Recommendation Fourteen/Product/Positioning:*

*The positioning statements contained in the 2009-2011 NOSTA Strategic Business and Marketing Plan are useful in that they communicate some of the aspects that are unique in the NOSTA region. They should be used as a guideline to ensure that the region is viewed as being distinctive by potential visitors.*

---



*Rock Climbing in the North of Superior Region*

*"Need more lakeside campsites."  
-Visitor*

## Demand Generators Chart

	In-market/VFR	Short Haul	Mid-Haul	Long Haul
<b>Seasonal Tourism Demand Generators – Built/Managed</b>				
Annual Music Festivals				
Aboriginal Pow wows				
Pukaskwa National Park				
Lake Superior Circle Tour				
Visiting & camping at the region's Ontario Parks				
<b>Seasonal Tourism Demand Generators – Natural</b>				
Big game hunting from intermediate to sport				
World class fishing from beginner to sport				
Snowmobiling on the region's well-groomed trails				
Wilderness trails				
<b>Year-Round Tourism Demand Generators – Built/Managed</b>				
Fort William Historical Park				
<b>Year-Round Tourism Demand Generators – Natural</b>				
View the region's natural beauty/scenery/wildlife				

- In-Market Travel – within immediate area or visiting friends/relatives (VFR); participate in day trips
- Short-Haul – within 2 hours drive
- Mid-Haul – within 3-5 hours drive
- Long-Haul – over 5 hours drive by car
- US long haul

Note: Based on "Survey Monkey" filtering.

Several of the Core Attractions draw heavily from the U.S. market as follows:

Hunting	US near Border States
Fishing	US near Border States
Snowmobiling	US near Border States
Canoeing/Kayaking	US near Border States
Ice Climbing	US near Border States

The visitors to the area that were surveyed reported seeing a variety of promotional materials on the region:

- 56.4% - brochures
- 46.9% - highway signage
- 45.3% - word of mouth
- 43.2% - maps
- 33.7% - Internet
- 29.3% - billboards
- 29.1% - newspapers
- 26.8% - magazines
- 13.4% - television
- 10.6% - radio
- 3.2% - trade shows

The relatively high percentage that indicated that they saw brochures and signs within the region would appear to indicate that many of these visitors are passing through and had not planned a trip to the region in advance. This is supported by the relatively low percentage of people who reported that they learned about the region on the Internet.

Since 69% of Canadian travellers and 75% of American travellers who visited Northern Ontario in 2007, planned their trips on the Internet<sup>24</sup>, this is a significant issue to be addressed. North of Superior Tourism Association's new Strategic and Business Plan details the Association's new marketing strategy and tactics which will emphasize e-marketing and fulfillment activities. NOSTA will focus increasingly on the Internet as a marketing tool and will launch a new web site along with an e-marketing program.

In addition, the recently published *Northwestern Ontario - Preparing for Change* report recommended a three-year pilot program to support the use of web based technology to market tourism. Many tourism stakeholders have also commented on the usefulness of the Tourism Keys training sessions. The Internet can also be used effectively in tourist bureaus to help visitors to learn what there is to see and do in the region.

---

*Recommendation Fifteen/Product/Internet Pilot Project:*

*Endorse the Preparing for Change recommendation for a three year Internet pilot project.*

---

*Recommendation Sixteen/Product/Training:*

*Through Tourism Keys, or another provider, make available a program to include training on using the Internet to market as well as to facilitate online bookings and purchases.*

---

*Recommendation Seventeen/Product/OTMPC Site:*

*Look for opportunities to cascade more effectively from the OTMPC site.*

---

**"Free up border – make it easier to cross."  
-Tourist Operator**

---

<sup>24</sup> TAMS, Ontario Ministry of Tourism, 2007

*Recommendation Eighteen/Product/Internet Access:*

*Seek funding to provide access to the Internet for visitors in all of the region's tourist bureaus.*

The majority of travellers to the region (44%) visit during the summer months, followed by those who visit in the spring (24%).

The following opportunities for increased year-round tourism were identified in the Process:

**Product Opportunities Chart**

<b>PRODUCT OPPORTUNITY</b>	<b>DESCRIPTION</b>	<b>SUPPORTING INFO</b>	<b>BUY IN</b>
Birding	Potential for structured bird watching products to be developed, birding events and festivals, birding tours and packages	<ul style="list-style-type: none"> <li>- The Land of the Nipigon</li> <li>- Trout Lake Learning Center</li> </ul>	<ul style="list-style-type: none"> <li>- Bird enthusiasts/bird experts/tour guides</li> <li>- Entity/organization to head up/host this product opportunity</li> </ul>
ATV Trails	Potential to expand existing snowmobile trails or develop trails exclusively for ATV's	<ul style="list-style-type: none"> <li>- ATV trails not dependent on snow</li> <li>- Visitor survey comments</li> </ul>	<ul style="list-style-type: none"> <li>- ATV enthusiasts</li> <li>- Trail developers</li> <li>- Entity/organization to head up product opportunity</li> </ul>
Non-Operating Ontario Parks	Potential to develop non-operating Ontario Parks in the Region	There are 51 non-operating Ontario parks in the Region	<ul style="list-style-type: none"> <li>- Ontario Parks</li> <li>- Ministry of Natural Resources</li> <li>- Levels of Government/ Possible funding agencies</li> <li>- Non Government partners (private/public)</li> </ul>
Aboriginal Experiences	Potential to develop products/packages based on Aboriginal experiences in the Region. (culture, heritage, language) For example, historic/heritage designations, language, sweat lodges, medicine men, food, story tellers, and authentic crafts	<ul style="list-style-type: none"> <li>- Visitor survey comments</li> <li>- Lack of Aboriginal experience products currently available</li> </ul>	<ul style="list-style-type: none"> <li>- Aboriginal population (including Elders, medicine/healing people, cooks, storytellers, authentic crafters)</li> <li>- Band offices/levels of Government/possible funding agencies/ Aboriginal organizations</li> </ul>
Wilderness Trail Touring	Potential for guided (structured and packaged) tours on the Region's wilderness trails Also expansion/further development and linkages of the Voyageur Trail	<ul style="list-style-type: none"> <li>- Value added trail tours</li> <li>- ie. Tour the trail, view nature, plant/flower recognition/uses, terrain, wildlife viewing, waterfalls, lake/bodies of water recognition, history/culture of the land/trail</li> <li>- Take away item after the tour is over</li> </ul>	<ul style="list-style-type: none"> <li>- Tour guides</li> <li>- Businesses for possible packaging partners</li> </ul>
Ice Climbing	Potential to expand on existing ice climbing products and/or develop new ice climbing products. For example, Ice Climbing lessons, retails/equipment, tours	<ul style="list-style-type: none"> <li>- Only a few businesses (Outfitters) offer ice climbing</li> <li>- There is World Class Ice Climbing in the Region (ie. Orient Bay)</li> </ul>	<ul style="list-style-type: none"> <li>- Ice Climbers/Ice Climbing Enthusiasts</li> </ul>

PRODUCT OPPORTUNITY	DESCRIPTION	SUPPORTING INFO	BUY IN
Up-Scale Spa	Potential to open an upscale spa; secluded with Lake View/Fireside/Café	<ul style="list-style-type: none"> <li>- Lack of upscale spas in the Region</li> <li>- Potential for elegant upscale spa on Lake Superior</li> </ul>	<ul style="list-style-type: none"> <li>- Entrepreneur</li> <li>- Possible funding agencies</li> </ul>
Shuttle Business to Area Attractions (consistent)	Potential to open a shuttle business to area attractions	<ul style="list-style-type: none"> <li>- Lack of transportation across the Region to area attractions.</li> <li>- Visitor survey comments</li> </ul>	<ul style="list-style-type: none"> <li>- Entrepreneur/current business owners</li> <li>- Possible funding agencies</li> </ul>
Extend Business Hours	Demand to extend business hours or to have more Sunday and evening shopping (and accommodations/gas/restaurants)	<ul style="list-style-type: none"> <li>- Visitor survey comments</li> </ul>	<ul style="list-style-type: none"> <li>- Business owners</li> </ul>
Tourist Information Centres	Demand to have tourist information centres open more and have more of them	<ul style="list-style-type: none"> <li>- Visitor survey comments</li> <li>- Core surveys with tourism operators/stakeholders</li> </ul>	<ul style="list-style-type: none"> <li>- All levels of Government</li> <li>- Entrepreneur</li> <li>- Possible funding agencies</li> </ul>
Cross-Country Skiing	Expand and more promotion of the Region's cross-country skiing opportunities, both competitive and leisure	<ul style="list-style-type: none"> <li>- added through PRTD Team meeting</li> </ul>	<ul style="list-style-type: none"> <li>- Cross-country skiing enthusiasts</li> <li>- Cross-country skiing clubs</li> <li>- Municipalities</li> </ul>
Annual Non-Music Festivals	Expand and more promotion of the Region's current annual non-music festivals and creation/packaging of new festivals	<ul style="list-style-type: none"> <li>- added through PRTD Team meeting</li> </ul>	<ul style="list-style-type: none"> <li>- Municipalities, First Nations</li> <li>- Organizations</li> <li>- Possible funding agencies</li> </ul>
Cruise Ship/Boating Potential	Expand and more promotion of (and developing more infrastructure geared to ships/boating) cruise ship/boating potential	<ul style="list-style-type: none"> <li>- added through PRTD Team meeting</li> </ul>	<ul style="list-style-type: none"> <li>- Municipalities, First Nations</li> <li>- Organizations (ie. Marina Marketing Association)</li> <li>- Boating enthusiasts</li> <li>- Possible funding agencies</li> </ul>
High end accommodation with meeting/convention space for more than 800 people	Expansion/improvement of existing accommodation or development of new to include more upscale style/amenities as well as a space to hold more than 800 people for meetings/conventions, etc.	<ul style="list-style-type: none"> <li>- added through PRTD Team meeting</li> </ul>	<ul style="list-style-type: none"> <li>- Entrepreneur/business owners</li> <li>- Possible funding agencies</li> <li>- Municipalities, First Nations</li> </ul>
GIS/GPS touring	High tech supporting low tech opportunities (i.e. Self guided tours with GIS/GPS)	<ul style="list-style-type: none"> <li>- added through PRTD Team meeting</li> </ul>	<ul style="list-style-type: none"> <li>- City of Thunder Bay</li> <li>- Geraldton Community Forest</li> </ul>

*Recommendation Nineteen/Product/Five Year Plan:*

*The opportunities identified in the Product Opportunities chart, along with the recommendations contained in this report and within the appendices have been summarized with proposed timelines, forming the basis of a Five-Year Strategic Tourism Development Plan for the region. This plan should be implemented in a timely manner to help to support the growth of tourism in the North of Superior region.*

***"Make available to small businesses information on what is out there for them, what programs they can take advantage of."***

**-Tourist Operator**

## Element 2: Quality and Critical Mass

This section addresses the extent to which the North of Superior region provides a memorable experience by offering a broad range of options for engaging in: core and related activities and entertainment, shopping and dining.

While the survey did not inquire if the Core destination experience stood out as memorable to the visitor, visitors nonetheless offered some very favorable assessments of the NOSTA region. 91.8% of visitors said that they found it easy to travel within the region and 98.2% said that they found the region to be hospitable and friendly.

Some of the core experiences are also typically "consumed" over a period greater than 24 hours. The core experiences and duration of visit are as follows:

Activity	Duration
Lodges/Resorts	3-4 nights to 1 week
Camping/Parks	1 night to 3-4 nights
Annual Music Festivals	1 night to 2 nights
Aboriginal Pow wows	1 day to 1 night
Provincial Heritage Site (FWHP)	1/2 day to 1 day
Museums/Galleries	2-4 hours
Ice climbing	4 hours to 1 day/night
Canoeing/Kayaking	Variable (water/weather dependent)
Snowmobiling	Passing through
Amethyst Mine	1/2 day to 1 day

In addition, through packaging and clustering, all of the core attractions can generate a visit of longer than 24 hours.

A variety of on-theme activities are also available to give guests a reason to stay overnight.

Activity	Duration
Beaches	1-2 hours
Snowshoeing	1-2 hours
Skiing	1-2 hours to 1 day
Nature observation	1-2 hours
Visiting historic/cultural sites (incl. amethyst mines)	1-2 hours to 1 day
Interpretive walks/tours	1-2 hours to 1/2 day
Casino	1-2 hours to 1/2 day
Shopping	1/2 day to 1 day
Bird watching	1-2 hours



By far the greatest percentage of visitors (65.9%) stays longer than a day:

<b>Length of Stay</b>	<b>Percentage</b>
Day trip	32.9%
2 days	12.6%
Less than 1 week	19.7%
1 week	10.8%
More than 1 week	22.8%

The region does offer a range of memorable experiences, creating core and on-theme activities sufficient to sustain tourist interest on a year-round basis. These include:

<b>Activity</b>	<b>Season</b>
Fishing and ice fishing	Summer and winter
Hunting	Spring, summer, fall
Snowmobiling	Winter
Built attractions	Year-round
Lodges	Year-round
Parks/camping	Mainly summer
Sightseeing cruises overnight	Summer
Canoeing/kayaking	Summer
Wilderness trails	Year-round
Day hiking	Summer, fall
Ice climbing	Winter
Nature observation	Year-round
Aboriginal Pow wows	Summer
Annual music festivals	Summer
Museums/galleries	Year-round
Sporting events	Year-round
Beaches	Summer
Snowshoeing	Winter
Skiing	Winter
View historical/cultural attractions (incl. amethyst mines)	Summer
Interpretive walks	Year-round, mostly summer
Casino	Year-round
Shopping	Year-round
Bird watching	Mainly summer

Sample Core and On-Theme Activities (Built/Managed and Natural)



Products are relatively easy to buy, with a growing number of operators offering other options beyond on-site purchases including Internet, toll free and third party purchases.

99%	On-site
32.6%	Internet
26.7%	Toll free number
17.6%	3rd party inside Region
12.3%	3rd party outside Region

In light of the growing number of people who research and book vacations online, the percentage of operators offering an online booking option is somewhat low. There does not appear to be, however, much interest in providing this service to visitors. When those operators who were surveyed were asked if they would like to receive more information on a locally-developed electronic reservation system, 60.2% said that they were not interested.

Packaging helps to make products easier to buy, as well. However, only 26.8 % of respondents indicated that they currently offer packages.

Most of the respondents indicated that they offer pricing geared to most or all of the following categories:

- Older Adult
- Group
- Adult
- Membership
- Children
- Family

Negative comments about pricing in the region included the following:

- Fuel is too expensive
- Provincial Park costs are too expensive
- Fishing fees are too expensive

Most of the respondents offer a "relaxation" experience, with few value-added learning experiences offered. The responses were as follows:

<b>Activity</b>	<b>Percentage</b>
Relaxation	58.1%
Entertainment	15.9%
Adventure	8.9%
Cultural/Historic Understanding	6.4%
Education	6.2%
Skills Development	3.4%
Interpretation	1.0%

***"Regional tours need to be promoted more."  
-Tourist Operator***

It is not known how or if the value-added experiences are promoted to guests.

Animation and interpretation is not widely offered in reception areas, with the exception of Fort William Historical Park in Thunder Bay.

The survey confirmed that the destination does indeed provide a range of cultural experience and entertainment options within a relatively inexpensive price range. Among the numerous options are the following:

<b>Activity</b>	<b>Approx. Price Range</b>
Special events/celebrations	N/C (No Charge)-\$10
Museums/Galleries	N/C (varies throughout Region)
Festivals	N/C-\$10
Music Festivals	\$10-\$35 Adult
Aboriginal Pow wows	N/C
Fort William Historical Park	\$11-\$15 Adult
Amethyst Mine Panorama	N/C-\$5
Live Theatre (Magnus Theatre, Thunder Bay)	\$21-\$50 Adult
Thunder Bay Community Auditorium	\$21-\$50 Adult
Thunder Bay Symphony Orchestra	\$16-\$20 Adult

Several events or venues in the region in the last two years have hosted performances by artists with name recognition beyond the local region. For example, the Thunder Bay Community Auditorium has hosted entertainers such as Anne Murray, George Jones and Joe Cocker. The Thunder Bay Blues Festival, in its 7th year in 2008, regularly attracts well-known blues performers. The Red Rock Folk Festival hosted this year such performers as Quebec’s Doug McArthur and Blues Element.

In the last two years, the Sleeping Giant Folk Society has hosted such performers as the late Willie P. Bennett, Valdy, House of Doc and Matt Minglewood. The Society does not put on any concerts in the region but does book acts in conjunction with other regional communities including Geraldton and Manitowadge. All of these towns have entertainment series. There is also a series entitled "Concerts in the Park(ing Lot)" staged throughout the summer in Marathon.

The North of Superior area also offers a range of dining options at a variety of price points. A total of 70 food and beverage facilities throughout the Region were surveyed including 38 in Thunder Bay and 32 outside the City. A variety of types of food service is available at the following average prices:

- Average entrée price range for City of Thunder Bay \$ 11-20
- Average entrée price range for outside City of Thunder Bay Below \$10

However, the region has considerably fewer fine dining style restaurants beyond the City of Thunder Bay.

*"More Tim Horton's and lower gas prices are necessary."*  
-Visitor

*"More activities on the water, trendy restaurants downtown and more cultural themes."*  
-Visitor

Of those surveyed, 11 restaurants in the region responded that they offer more than 25 wine labels. Only one of these, however, is outside the City of Thunder Bay.

<b>Restaurant</b>	<b>No. of wine labels</b>	<b>Location</b>
Marino's Restaurant	25-50	Marathon
Bistro One	50+	Thunder Bay
The Fox & The Hedgehog	50+	Thunder Bay
Elements Restaurant	50+	Thunder Bay
Aurora Grille	25-50	Thunder Bay
The Keg	50+	Thunder Bay
Timber's Restaurant	25-50	Thunder Bay
Lot 66	50+	Thunder Bay
The Nordic Room Restaurant	50+	Thunder Bay
Giorg Ristorante	25-50	Thunder Bay
Caribou Restaurant & Wine Bar	50+	Thunder Bay

A number of restaurants in the region have trained and/or accredited chefs. Of those surveyed, the following reported that they had chefs that are trained and/or accredited.

<b>Restaurant</b>	<b>Location</b>	<b>Accreditation</b>
Timbers Restaurant	Thunder Bay	Red Seal
Good News Café	Thunder Bay	Chef's Papers, Red Seal
The Nordic Room	Thunder Bay	Red Seal
MadHouse Tavern Grill	Thunder Bay	College certificate
Giorg Ristorante	Thunder Bay	Red Seal
Chicago Joe's Restaurant	Thunder Bay	Red Seal, Food Safety
Caribou Restaurant	Thunder Bay	Chef's papers
The Fox & The Hedgehog	Thunder Bay	Red Seal
Elements Restaurant	Thunder Bay	Red Seal
Scuttlebutts Bar & Grill	Thunder Bay	Red Seal
Club Cappuccino	Thunder Bay	Chef's papers
Aurora Grille	Thunder Bay	Chef's papers
Swiss Chalet	Thunder Bay	Red Seal
Bistro One	Thunder Bay	Red Seal
The Bakery	Geraldton	Red Seal
China Garden	Nipigon	Training outside Canada
John's Shell Restaurant	Nipigon	College
Murillo Family Restaurant	Murillo	Red Seal

Four of these eighteen restaurants are outside of the City of Thunder Bay.

The number of chefs and/or restaurants in the North of Superior region that have name recognition beyond the local region is somewhat more evenly balanced between the City and the region. Of the restaurants that were surveyed, 10 outside the City of Thunder Bay and 18 within the City of Thunder Bay reported that they had achieved name recognition beyond the region. These were:

#### Thunder Bay

1. La Dolce Vita Pastries
2. Wendy's Restaurant
3. Good News Café
4. Norma Jeans
5. Giorg Ristorante
6. Chicago Joe's Restaurant & Sports Bar
7. Burger King Restaurant
8. Elements Restaurant & Lounge
9. Scuttlebutt's Bar & Grill
10. The Pita Pit
11. Boston Pizza
12. Applebee's Neighborhood Bar and Grill
13. Grinders Coffee Lounge
14. Hoito Restaurant
15. East Side Mario's
16. Swiss Chalet
17. Bistro One
18. Kelsey's Bar and Grill

#### Outside City of Thunder Bay

1. Wah's Restaurant - Terrace Bay
2. Rendezvous Restaurant - Manitouwadge
3. Sizzlers Restaurant - Geraldton
4. Blue Lagoon Pizza - Geraldton
5. Silverado Saloon - Geraldton
6. Neebing Roadhouse and Steakhouse - Neebing
7. Superior Dining - Terrace Bay
8. E and J's Restaurant - Armstrong
9. The Bakery - Geraldton
10. John's Shell Restaurant - Nipigon

The development of a regional cuisine/culinary tourism program has helped other regions to highlight their uniqueness to visitors and potential visitors. The level of expertise should be helpful in the development of such a program in the North of Superior region.

***"Need server training."***  
**-Visitor**

Culinary tourism has been defined as<sup>25</sup>:

- Travel that includes the appreciation and consumption of local/regional foods
- Travel for the primary purpose of experiencing and enjoying food and beverages or to attend culinary-specific activities such as cooking schools, visiting a food or beverage production/processing site, a farmer's market or a "taste trail"
- Unique dining and beverage experiences

Characteristics of culinary tourism can include<sup>26</sup>:

- Experiencing food out of the "everyday situation"
- An experience and appreciation of the local cuisine of the area being visited including sampling or consumption
- Experiencing taste by learning about locally and provincially grown food from the farm to the restaurant
- Celebrating local culture, enjoying new food and sensory experiences and purchasing them to take home
- Understanding a "sense of place" through the consumption of unique ingredients and/or production and preparation technique of food and beverages

The popularity of food and beverage can be shown by the increasing number of cooking shows on television, food-related magazines and cookbooks, culinary tour packages, taste classes and culinary festivals. As such, culinary tourism can readily become one of a region's Core Attractions or at least an important Supporting Attraction. In the North of Superior region, where visitors have commented about the lack of appealing dining experiences, development of a culinary tourism/regional cuisine program could go a long way in addressing this problem.

---

*Recommendation Twenty/Product/Regional Cuisine:*

*Form a working group of chefs to discuss ways to develop and implement a regional cuisine product.*

---

The region also offers a good range of retail shopping opportunities including clothing, crafts and memorabilia at a range of price points. Of those surveyed, the following categories of shopping experiences were offered:

Note: These numbers are based solely on those businesses that participated in the PRTD Process.

**Bargain/Discount Price Point**

- 3 within City of Thunder Bay
- 6 outside City of Thunder Bay
- Total 9

**Average Price Point**

- 38 within City of Thunder Bay
- 80 outside City of Thunder Bay
- Total 118

**High End Price Point**

- 13 within City of Thunder Bay
- 2 outside City of Thunder Bay
- Total 15

An impressive number of stores or galleries in the region area have name recognition beyond the regional boundaries. Of those surveyed, there were 75 in total, excluding chain, department stores and malls, reporting that they have name recognition.

*"Businesses are closed too much on long weekends."*

**-Visitor**

---

<sup>25</sup> *Culinary Tourism in Ontario: Strategy and Action Plan, 2005-2015, IDO*

<sup>26</sup> *Culinary Tourism in Ontario: Strategy and Action Plan, 2005-2015, IDO*

### Element 3: Satisfaction and Value

This element documents the extent to which the destination offers its guests:

- a welcome
- satisfied expectations and
- value for money

It also investigates what the destination is doing to enhance its performance in these areas.

Overall the region is viewed as being a welcoming destination, with 98.2% of visitors saying that the region was both friendly and hospitable. Having said this, only 38.1% of the 513 businesses surveyed offer customer comment or guest survey cards. Thus, the majority of tourism businesses are not likely to be as aware as they should be of the degree to which customers are satisfied and what their other interests might be.

---

*Recommendation Twenty-One/Product/Survey Template:*

*That a template for a visitor satisfaction survey be provided as part of the North of Superior Tourism Association's membership package.*

---

This section looks at whether the destination is perceived as offering value for money spent and whether it is considered "good value" or "expensive but worth every cent" by guests and by travel agents and tour operators packaging experiences at the destination.

With today's consumer demanding quality for a fair price, demonstrated value is an important consideration. The Northern Ontario "value proposition" is discussed in the 2007 report, *Interim Report No. 2 – Opportunity Assessment: Best Bets for Success*. Acknowledging that consumers are increasingly demanding quality and demonstrated value and that the cost of getting to Northern Ontario is higher than for many other Canadian and U.S. destinations, the report recommends a focus on "niche markets where Northern Ontario has a natural advantage, emphasizing value-features and services—in other words, a strong differentiation strategy."<sup>27</sup>

Over the past three years, key experience and service prices have been monitored and are primarily staying constant as follows:

Stayed about the same	55.8%
Increased	38.4%
Decreased	5.9%

In spite of this, visitation over the same period of time has been tracking downwards.

Stayed about the same	35.5%
Increased	30.1%
Decreased	34.5%

There are, of course, numerous reasons why tourism numbers have declined over the past three years beyond pricing. These reasons include the high cost of fuel, border crossing issues, a strong Canadian dollar, poor economic conditions in some key markets and growing global competition.

---

<sup>27</sup> Malone Given Parsons, PathWise Group, Forrest Marketing + Communications, *Interim Report No. 2 – Opportunity Assessment: Best Bets for Success*, April, 2007



## Element 4: Accessibility

The **Accessibility** element assesses:

- the ease of getting to the destination
- the transportation modes that serve it
- the waterfront communities' "friendliness" to cruise ships or boat passengers
- the recognition given to the importance of transportation to the tourist experience

Spanning over 500 km from Upsala to White River, the region is both vast and remote. As such, accessibility is a key issue.

None of the communities in the region including Thunder Bay is within a three hour drive of any major population centre, with the nearest large urban area of Minneapolis-St. Paul being about a six hour drive away from Thunder Bay.

While many of the region's smaller communities and municipalities are within a three hour drive of Thunder Bay (population 109,141), this market is not extensive, with populations ranging from 70-3000 people.

Thunder Bay offers both a U.S. border crossing less than an hour south of the City as well as an international airport within the City limits. Few of the region's other communities, however, are within a two hour drive of the border crossing and international airport.

Flight time from the airport in Thunder Bay to the nearest regional airport in Geraldton is approximately one hour.

91.8% of visitors feel that it is easy to travel within the region. Of those who had concerns about travel in the region, comments tended to centre around the following issues:

- Delays due to highway and related construction
- Not enough (or in many cases not clean enough) rest stops / pull over areas / washrooms
- Not enough paved areas for bicycling
- Inadequate number of passing lanes
- Lack of four-laned highways
- Lack of chain accommodations
- Lack of travel centres or not enough travel centres open later

The commonly used routes are:

- Highway 11
- Highway 17
- Highway 11/17
- Highway 527 to Armstrong
- Highway 584 to Nakina
- Highway 614 to Manitouwadge
- Highway 61

These routes are well used and well signed and are marketed to some extent.

While the majority of travel to and through the region is by automobile, other options are becoming increasingly important to offer due to the high price of fuel. While bus service through the region is available and most municipalities offer taxi service, few attractions offer shuttle service.

The region's numerous waterfront locations represent key strengths to be capitalized upon. In light of this, throughout the region, communities are working on developing their waterfronts more for recreation, activities, camping and cruise/boat potential.

The Township of Nipigon offers 41-250 meters of dock wall and 11-25 transient slips, while the Township of Red Rock features 20 meters of slips and 2.5 meters of draft. In Thunder Bay, plans are underway for a major waterfront expansion, including over the next two to three years, the addition of another 250-300 slips for vessels. Where cruise ship and/or transient marina slip dockage is offered, these are all located near downtown areas or attractions.

The region also has an active Marina Marketing Association.

The full list of businesses surveyed in the Transportation sector and others that operate in the region along with the Transportation Resources Checklist is contained in Appendix H of this Report.

Further steps could be taken to make access to the region and its attractions more visitor-friendly. For example, the region's airports need to be better utilized to deliver the North of Superior marketing message. The larger issues such as the lack of four-laning and passing lanes and inadequate signage have been identified in numerous other reports and need to be addressed.

### Element 5: Accommodations Base

The Accommodations Base element assesses the breadth and depth of the destination's offering in terms of:

- the range of accommodation classes available
- the range of locations available
- the presence of higher end operators

Of those who were surveyed, the following number of rooms is known to be available in the following property classes:

**Note:** Some businesses did not answer each survey question.

Class	Number of Properties	Number of Rooms	Price Range
RV Park	11	1 has 1-25 sites for RVs 5 have 26-75 sites for RVs 4 have 76-150 sites for RVs 1 has 49 sites for RVs	1 - \$25.00 2 - \$26.00 1 - \$22-28.00 4 - \$28.75 1 - \$26.75 1 - \$32.75 1 - \$28.75-32.75
Bed & Breakfast	17	15 have 1-10 rooms 1 has 11-25 rooms	3 - Less than \$50 7 - \$50-100 5 - \$101-150
Lodge	22	Did not survey	Did not survey
Resort Lodge/Hotel	Grouped with above		
Motel – Independent	35	3 have 1-25 rooms 16 have 1-10 rooms 16 have 1-10 rooms	2 - Less than \$50 29 - \$50-100 3 - \$101-150 1 - No response
Motel – Chain	0	0	0
Hotel – Independent	6	1 has 1-10 rooms 2 have 1-25 rooms 3 have 1-150 rooms	1 - No response 1 - Less than \$50 2 - \$50-100 1 - \$101-150 1 - \$151-200
Hotel - Chain	11	6 have 1-75 rooms 4 have 1-150 rooms 1 has 150+ rooms	1 - \$50-100 9 - \$101-150 1 - \$151-200

While the price point choice in Thunder Bay is relatively extensive, the rest of the region lacks higher-end accommodations, with the exception of some upscale lodges and resorts. The region is also lacking in chain style attractions along travel corridors but these "branded" (broadly known and respected) high end operators are more widely available in Thunder Bay.

## PERFORMANCE DIMENSION

---

Performance is the second of the three dimensions to be analyzed. The purpose of this stage of the process is to evaluate various aspects of the region's strength in the marketplace, along with its reputation.

### Element 1: Visitation

The **Visitation** element assesses the destination's market performance in terms of:

- its visitation numbers and market shares
- its attractiveness to different market segments
- its attractiveness over the four seasons of the year

The region does not attract a significant share of the total visits to Ontario which included activities relying on the destination's core attractions classes. The total visits to the North of Superior region in 2004 were 1,361,241 or 1.4% of the Ontario total of 94,227,829<sup>28</sup>. This is due to a number of factors, including the region's isolation from major population centers. The region is, however, an important component of what Ontario can promote to potential visitors, offering authentic outdoor and cultural experiences.

The majority of the visitors to the North of Superior region in 2004 were from Ontario, accounting for 67% of the total visitation to the area that year. U.S. visitors accounted for 24% and visitors from other Canadian provinces accounted for 8%. About 1% of visitors to the region came from overseas countries. The top five markets for the region were Thunder Bay District (49%), Minnesota (7%), Michigan (5%), Wisconsin (3%) and York Regional Municipality<sup>29</sup>.

Business visitors to the region in 2004 contributed 4% of the total visitation<sup>30</sup>. While Thunder Bay currently attracts a significant number of small to mid-size meetings and conventions and is attempting to capture more with a focused strategy, the region lacks the capacity to host these types of events.

The following is a comparison of the North of Superior region's visitation with that of some of its competitors:

Total visits to Thunder Bay District '04	1,361,241 (1.44% of Ontario total)
Total visits to Kenora District in '04	904,924 (0.96% of Ontario total)
Total visits to Manitoba in '04	7,125,958
Total visits to Algoma District (Sault Ste. Marie)	1,966,009 (2.1% of Ontario total)
Total visits to Duluth, Minnesota	3,500,000 <sup>31</sup>

The region's offering draws from multiple market segments, attracting visitors with different visitor profiles, including the following market segments:

- Outdoor adventurers/enthusiasts (canoeists/kayakers, boaters, hikers, sailors, snowmobilers, skiers, hunters, fishers, cyclists, golfers)
- Baby Boomers
- Seniors
- Visitors passing through
- Eco-tourists
- Touring families
- Nature enthusiasts
- Couples
- Birding enthusiasts

While the region is a four-season destination to some extent, visitors are most likely to arrive in the summer. For all of Northern Ontario, 44% of all visitors came during July-September and 24% came from April-June, 2004<sup>32</sup>.

---

<sup>28</sup> *An Overview of Tourism in Northern Ontario*, FedNor, 2004

<sup>29</sup> NOSTA Strategic Business and Marketing Plan 2009-2011

<sup>30</sup> *An Overview of Tourism in Northern Ontario*, FedNor, 2004

<sup>31</sup> *Bridging the Past, Visit Duluth*, 2005

<sup>32</sup> *An Overview of Tourism in Northern Ontario*, FedNor, 2004

## Element 2: Occupancy and Yield

The **Occupancy and Yield** element assesses the destination's market performance in terms of:

- accommodations base occupancy
- guest expenditure levels

This section assesses the destination's occupancy and expenditure performance compared to norms, provincial averages and the destination's share of visitation.

The City of Thunder Bay's year-to-date hotel occupancy level is approximately 68% and, based on discussions with regional tourism stakeholders, EDOs and hotel operators, the regional accommodations occupancy rate is estimated to be approximately 75% and higher during the summer season, from 50%-74% during the spring and much lower during the shoulder season. While occupancy is spread over the year, the highest occupancy levels in both Thunder Bay and the region are experienced during the summer season.

The chart below provides a summary of the responses received from 85 regional accommodations operators regarding their occupancy and the seasonal trends:

Season	Less than 50%	50% to 64%	65% to 74%	75% to 85%	Over 85%	N/A
Period 1: January to March	64.2% (52)	19.8% (16)	1.2% (1)	2.5% (2)	1.2% (1)	11.1% (9)
Period 2: April to June	25.9% (22)	31.8% (27)	24.7% (21)	14.1% (12)	3.5% (3)	0.0% (0)
Period 3: July to September	10.7% (9)	15.5% (13)	13.1% (11)	23.8% (20)	36.9% (31)	0.0% (0)
Period 4: October to December	49.4% (41)	15.7% (13)	15.7% (13)	8.4% (7)	2.4% (2)	8.4% (7)

The average expenditure per capita for guests on day trips to the region in 2006 was significantly higher (\$183.87) than the provincial average of \$97.18. In 2006 the average expenditure per capita for overnight visitors to the region was also higher than the provincial average at \$90.36 per person compared to \$87.81 for the province. However, the region's share of expenditures by guests on both day trips and overnight visits was considerably lower than the share of day trips in Ontario. In 2006, total spending by visitors on day trips to the region was \$232,107,899 compared to \$17,694,051,216 for the province. Overnight visitors to the region spent \$154,502,202 in 2006 compared to \$11,778,938,036 for the province<sup>33</sup>.

*"Need a really good modern motel on the highway."*

**-Tourist Operator**

*"Develop and implement customer service program and hospitality standards for tourism businesses."*

**-Tourist Operator**

<sup>33</sup> 2006 Travel Survey of Residents of Canada and International Travel Survey

### Element 3: Critical Acclaim

The **Critical Acclaim** element addresses the extent to which the destination is recognized as:

- "must see/must do" on general grounds or those more specific to a given type of experience
- having a profile that contributes to the attractiveness of Ontario and Canada as a destination
- a top-ranked place to visit

Northwestern Ontario (and to a somewhat lesser extent the North of Superior region) has long been considered a "must see/must do" location for fishing and hunting products. This is corroborated by several recent studies that indicated that perceptions of Northwestern Ontario among people who had not visited this region is that it is a "laid back, vast wilderness that offers opportunities to experience the outdoors, primarily through hunting and fishing activities."<sup>34</sup> The studies also revealed widespread uncertainty about accommodations and amenities and low awareness among non-travellers about things to do beyond hunting and fishing.

According to some visitor surveys as well as discussions with local tour operators, visitors believe that Northwestern Ontario is quite different from Southern Ontario as a tourism destination. Many visitors mentioned that travelling from one side of Ontario to the next is like travelling through different provinces because of the uniqueness and difference of the regions.

The region has also gained recognition through the Lake Superior Circle Tour. In addition, Lake Superior itself is a widely-recognized icon as the world's largest freshwater lake and the home of the legendary Sleeping Giant, a People's Choice Winner in the CBC's recent Seven Wonders of Canada contest.

*"I remember the first time I saw Lake Superior. One look just sucked the breath out of my lungs. It is astounding in its breadth and scope. That is not communicated well in my country. I work in areas that would die for 10 feet of what's on that lake. In Western Oklahoma, they would die to have one 100th of 100th of 1 per cent of what you have. You have, in my estimation, in Lake Superior one of the iconic natural landscapes on the planet like the Grand Canyon or Yellowstone or Yosemite or the Serengeti or Ayers Rock. You have exactly the same scale, the same scope and the same type of resource. It is that resource that can carry this part of the world for eons, if it is understood and it is used with sensitivity and care. From a business angle, if there are communities on this lake that are struggling, shame on you. You shouldn't be. It's going to take a different vision of what the possibilities are."*

Ted Eubanks, CEO of Texas nature-based tourism company Fermata Inc.

Destination imagery of, and/or text about the North of Superior region or its core attraction(s) is used in promoting Ontario. The Ontario Tourism website, [www.ontariotravel.net](http://www.ontariotravel.net) has on its home page a visual of an Aboriginal dancer at Fort William Historical Park and of a canoe on a Northern lake. As well, the page offers an image of a kayaker and children on a beach which could, again, be evocative of North of Superior. The site also has a dedicated "Northern Ontario" section with a banner featuring an image of a moose. Within the North of Superior section are images of the region's scenery, Fort William Historical Park, parks and other attractions and areas.

The Canadian Tourism Commission does not list any Northern Ontario experiences in its "Top Things to do in Ontario" section. The only similar products mentioned are Aboriginal experiences and wilderness tours, both of which are products offered in Ottawa. A search of the site using the words "Northern Ontario" reveals only one match, [www.getnorth.com](http://www.getnorth.com), a former regional cities and attractions touring site which no longer exists. A search using the words "North of Superior" reveals no matches.

<sup>34</sup> *Interim Report II: Opportunity Assessment*, Malone Given Parsons, PathWise Group, Forrest Marketing + Communications.

---

*Recommendation Twenty-Two/Performance/CTC:*

*Strengthen communications with the Canadian Tourism Commission to ensure that Northern Ontario has a presence on their web site. This may be achieved through the provision of information on one or more of their "focus" areas such as Aboriginal and sports tourism.*

---

Two of the region's attractions have been ranked "Best in Class" or "Top Tier" in consumer or industry rankings.

Fort William Historical Park - Thunder Bay

- 2006 Best Outdoor Attraction – Attractions Canada
- Top 10 Attractions in Canada – Globe & Mail 2005
- 2006 Best Outdoor Facility – Attractions Ontario
- 2006 Tourist Event of the Year – Tourism Industry Association of Canada

Amethyst Mine Panorama - Dorion

- Attractions Canada Winner
- A "Must See" Attraction – Readers' Digest

*"A road from Armstrong to Geraldton should be supported."*

**-Tourist Operator**

*"Perhaps special packages could be offered at hotel/motels to encourage people to visit tourist areas like the amethyst mines."*

**-Visitor**



*Amethyst Mine Panorama*



*Whitewater Golf Club*

*"Not enough road access to lakes."*

**-Tourist Operator**

---

## **FUTURITY DIMENSION**

---

The purpose of the Futurity Dimension is to examine the ways in which the region and its stakeholders are investing in the future. Issues such as marketing, investment and capacities are examined.

### **Element 1: Destination Marketing**

The **Destination Marketing** element identifies the extent to which the destination:

- targets viable markets
- invests in managing and promoting its tourism marketplace
- consults with the travel trade operators and agents serving area visitors and residents

While there is currently a decline in tourism travel to the region, there is clearly market demand for the unique type of products the North of Superior region possesses. When asked through the survey what attracted them to the region, the majority of visitors responded with the following:

- Lake Superior Circle Tour
- Scenery, wildlife
- Lake Superior, nature, wilderness, relaxing
- Beauty of the Region
- Amethyst
- Fishing
- Outdoor wilderness
- Pow wows
- Kakabeka Falls
- Nature and adventure
- Parks
- Hunting
- Quiet
- Hiking trails
- Canoeing/kayaking
- Visiting friends and relatives (VFR)
- Passing through en-route to another destination

*"Need a map of great hiking  
and 4x4 trails in area."  
-Visitor*

*"Long span of highways with  
few amenities."  
-Visitor*

When asked what the strengths of the region were, the majority indicated the following:

- Natural beauty, Sleeping Giant, landscapes, scenery, nature, outdoors, forests, Lake Superior
- Fishing/Hunting
- Aboriginal culture
- Outdoor recreation
- Snowmobiling

*"Rent equipment - canoeing, kayaking, snowshoeing,  
rock and ice climbing."  
-Tourist Operator*

This is supported by the latest TAMS research which offers the following percentages of Canadian and American visitors to Ontario who participated in these activities in 2005 and 2006:

Activity	Percentage U.S.	Percentage Canadian
Natural beauty/scenery ("Wildlife viewing")	26.9%	30.7%
Fishing	14.6%	17.6%
Hunting	4.2%	3.5%
Aboriginal culture	6.6%	8.6%
Snowmobiling/ATVing	5.5%	8.4%

Travel to the region has recently been declining but future demand for Northern Ontario products has been predicted in several reports.

The 2004 *Northern Landscapes Report* predicted increases in ATV and snowmobile tourism along with above-average growth in travel to take part in Aboriginal events and see Aboriginal attractions and in other nature-based activity market segments such as fishing, hunting and hard and soft outdoor adventures.

The recently published *Northwestern Ontario: Preparing for Change* (February 2008) report contains recommendations that support the furthering of opportunities for eco-tourism and adventure tourism.

Tourism Thunder Bay is one of the region's two major Destination Marketing Organizations (DMO), and the lead Municipal tourism marketing association in Northwestern Ontario.

This division within the Community Services Department of the Corporation of the City of Thunder Bay is responsible for product development, industry education and marketing of the city as a destination for diverse tourism markets including leisure, sport, corporate and group travel visitors.

Tourism Thunder Bay is a nationally respected leader in the development of aggressive and innovative multi-media tourism marketing campaigns that position the city as a gateway to the region around a strong "Superior By Nature" brand.

With an annual operating budget of \$1.2 million and a staff of 13 full and part time, Tourism Thunder Bay has an established reputation of delivering high quality programs and services that are consumer focused. With a marketing and promotions budget of approximately \$600,000 annually, the department has been continually successful in establishing innovative partnerships and revenue generation programs that leverage additional resources to raise the profile of the city as a unique destination and gateway to outdoor adventures.





The division utilizes web, targeted print, media and web 2.0 collaborative digital media effectively to reach key domestic, US and overseas markets and has established itself as one of the first municipal tourism marketing organizations in Canada to successfully utilize social media channels of Facebook and You Tube to reach key market segments.

The division is staffed by specialists who are responsible for marketing coordination, product development, media relations, group tour and sport tourism planning, visitor services and meetings and convention planning. It operates two of Canada's most iconic tourism information centres: the Terry Fox Visitor Information Centre, located at the memorial site of the late Canadian hero's last steps and the Pagoda, a seasonal centre at the waterfront that is Canada's oldest continually operating tourism information pavilion.

Tourism Thunder Bay's key accomplishments include:

- Development of the "Seven Days With the Giant" leisure marketing campaign in partnership with the Strategic Tourism Development and Marketing Partnership for Northern Ontario (FedNor, NOHFC and OTMPC), Ontario Parks, Nikon, Gary and Joanie McGuffin and over a dozen local private sector partners. The campaign led with the Sleeping Giant Provincial Park and Lake Superior as a main iconic draw for the community, generating over 25,000 entries to a \$15,000 family vacation prize to Thunder Bay and increased web visitation to [www.VisitThunderBay.com](http://www.VisitThunderBay.com) by over 51% over the previous year. The campaign's success has established a new standard for urban tourist marketing organizations to lead with outdoor experiences and is being featured as a case study at the 2008 International Eco Tourism Conference in Vancouver on how cities and parks work together to market the region.
- Pioneering use of social media channels such as You Tube, Facebook, portals and blogs to communicate effectively and collaboratively with key experience seeking markets, Tourism Thunder Bay has established [ThunderBayTourismPartners.blogspot.com](http://ThunderBayTourismPartners.blogspot.com), the main industry information sharing portal that provides an elevated level of departmental transparency to the local tourism industry and allows collaboration from industry partners.
- Development of a unique and comprehensive annual visitor experience magazine promoting Thunder Bay to leisure, sport and corporate markets. The guide available in print and digitally, reaches over 180,000 visitors annually.
- Tourism Thunder Bay has entered into a unique partnership with OTMPC to provide content management to the new Northern Ontario tourism portal, ensuring photos, stories, itineraries and video is uploaded to both the municipal and provincial websites, creating a fluid platform for potential new visitors to become digitally engaged in the local experiences.

Tourism Thunder Bay's 2009 marketing strategy will align with the new Northern Ontario five year tourism strategy. As part of Ontario's North, a collaboration of the five major Northern Ontario cities (Thunder Bay, Sault Ste. Marie, Sudbury, Timmins and North Bay), Tourism Thunder Bay contributes on a pan northern Ontario marketing initiative to promote the region for travel media, group touring and select leisure marketing initiatives. Tourism Thunder Bay has entered into a partnership with Ontario Tourism Marketing Partnership's Northern Office to provide local content management for the Province's new Northern Ontario web portal as well as on its own new collaborative website, [www.visitthunderbay.com](http://www.visitthunderbay.com), allowing for greater local control in the distribution of timely and relevant visitor information.

*"Take pride in what makes our city (Thunder Bay) and population unique,  
our history and culture."*

**-Tourist Operator**

North of Superior Tourism Association, the second major DMO in the region, is focusing on location destination versus a larger travel region. This DMO is currently funded at a level of \$450,000 with about 45% allocated towards Marketing/Communications. In a highly competitive marketplace, having adequate funding in place and utilizing that funding in the most efficient ways is increasing in importance.

North of Superior Tourism Association is currently finalizing its 2009-2011 Regional Strategic Business Plan and Marketing Plan. The focus on this plan is primarily on marketing, tracking and membership recruitment.

Its goals and objectives are:

- The two priorities for NOSTA operations will be membership and marketing. These priorities reflect the direction given by the membership, put the focus on revenue generating activities and are in keeping with available in house human resources.
- NOSTA will become the "go to" source for visitor information for those coming to the region. Via branding activities, a more strategic approach to NOSTA's target markets and marketing tactics and playing a "fulfillment" role as a destination marketer, NOSTA will partner where appropriate to avoid duplication of effort, cooperate with the cascading approach outlined in the Northern strategy and differentiate itself from competing destination messages.
- NOSTA will increase revenue from membership services in order to replace less secure funding sources. This will be achieved by offering a wider menu of marketing opportunities to members and by providing "specialized" member services to municipalities, based on marketing agreements.
- NOSTA will become more relevant to its membership not only via a marketing focus, but by leveraging technology to execute more efficient, economical and effective marketing tactics, partnering where appropriate, successfully branding the destination and ultimately, by increasing the number of leads sent to members.
- The NOSTA Board, Executive and President will be responsible for the majority of advocacy functions.

In order to assess the progress of the marketing plan, NOSTA intends to establish a marketing measurement system - a continuous process in which marketing outcomes and results are collected, analyzed and reported on a regular basis.

A number of different marketing measurements will be utilized. These measurements require that ongoing tracking mechanisms are implemented which will include inputting data on an ongoing basis, manual tracking by front line staff, specific web site activity reports from the web site provider, required entry fields on web site sign up sections and the use of contests and dedicated URLs as part of marketing activities. The result will be the collection of three different types of measures: activity, efficiency and effectiveness measures. An annual conversion study which involves contacting those who made inquiries or received information via various sources and asking if they actually visited the destination will also be undertaken.

The marketing tactics to be measured will be:

- Collateral
- Advertising
- Web site
- Media relations
- E-marketing
- Overall marketing program
- Consumer shows

NOSTA reports annually on its performance towards the achievement of its objectives.

From the surveys, it was determined that 68.0% of tourism operators in the North of Superior region provide customer service training programs, including SuperHost, in-house training and Smart Serve. In spite of this, some visitors have commented that front line staff, while friendly, are lacking in knowledge about the region and what it has to offer.

## Element 2: Product Renewal

The **Product Renewal** element assesses the extent to which the destination is making capital investments in its attractiveness into the future.

This section will document the status and magnitude of destination investment.

Although 33.5% of the businesses who responded to the PRTD survey reported that their business had decreased, reinvestment and new investment is nonetheless still occurring in the region to enhance, revitalize or develop facilities relevant to the quality of the tourist experience. In the past five years, capital has been invested in facility renewal, expansion or development. Of the 513 tourist operators asked, "Have you invested capital to renew, expand or develop your facility/product in the last two years or the last five years?"; 72% said that they had invested to renew their facility or product in the last two years, and 65.5% reported that they had invested in the last five years.

With respect to the amount invested, the largest percentage had invested between \$10,000 and \$50,000 in the last two years. Their investments were as follows:

Percentage	Amount Invested
25.4%	less than \$10,000
37.7%	\$10,001-50,000
12.0%	\$50,001-100,000
14.8%	\$100,001-500,000
1.4%	\$500,001-750,000
0.7%	\$750,001-1,000,000
8.1%	\$1,000,000 +

Similarly, the largest percentage of those who had made investments in the last five year had invested between \$10,000 and \$50,000. Their investments were as follows:

Percentage	Investment Level
20.8%	less than \$10,000
34.2%	\$10,001-50,000
13.3%	\$50,001-100,000
17.5%	\$100,001-500,000
2.5%	\$500,001-750,000
0.4%	\$750,001-1,000,000
11.3%	\$1,000,000 +

In both cases, a considerable number (8.1% and 11.3% respectively) had invested over one million dollars.

*"Marketing needs to stress how we're different."*  
-Tourist Operator

The region's attractions have demonstrated an ongoing commitment to reinvesting in programming and other improvements in order to enhance the visitor experience. Of the 513 businesses asked, "How often do you introduce new programs or experiences to your facility/operation in order to enhance the visitor experience?", the responses were as follows:

Frequency of Investment	Percentage
Seasonally	27.1%
Annually	19.0%
Bi-Annually	7.3%
Monthly	15.6%
Weekly	8.5%
Daily	7.8%
Other <sup>35</sup>	18.5%

In addition, 50.9% of those who responded to the survey had plans to modify or expand their operation in the next 3 years.

There are numerous examples both in Thunder Bay and the region of the attractions making investments to enhance their appeal to visitors and their ability to attract new visitors.

At Fort William Historical Park, there are ongoing plans to enhance the infrastructure. Options such as an RV park, an IMAX theatre and an Aboriginal interpretive center have recently been discussed. In addition, new programs are incorporated into the programming seasonally. The Fort's amphitheatre has also recently been expanded and enhanced and now offers a 50,000 person capacity.

Sleeping Giant Provincial Park undertakes continual maintenance of its infrastructure and comfort station and, in addition, incorporates new programs annually. At Quetico Park, trail maintenance and signage are investment priorities while at Kakabeka Falls and Rainbow Falls Provincial Parks, continual upgrading and maintenance of facilities are undertaken as required and new programs/experiences are added each year. At the Amethyst Mine Panorama in Dorion, new programs/experiences are also added annually.

Opwaaganising Traditional Pow Wow has plans to rebuild the new Arbor and expand the campground. This event also incorporates new programs/experiences on an annual basis.

The Friends of Chippewa Park in Thunder Bay recently announced \$250,000 in new funding for staffing and renewal of the Park's beaches. The organization's president estimated current annual visitation to the Park (including local residents) at 500,000.

Guest visits and expenditures make a net positive and significant contribution to the economy of the North of Superior region. Same-day and overnight visitors spent \$236,845,252 in the North of Superior region on tourism related expenditures/categories including lodging, food and beverages, transportation, entertainment, and retail during 2004. Overnight visitors spent \$187,833,682 in the Thunder Bay District in these categories in 2004<sup>36</sup>.

The \$236,845,252 in spending in region generated the following additional benefits<sup>37</sup>:

- \$171,208,000 direct, indirect and induced contributions to gross domestic product
- \$88,093,000 of labor income and salaries
- \$100,412,000 total taxes generated as a result of visitor spending including \$1,860,000 in municipal taxes

<sup>35</sup> Includes rarely, as necessary, as required, depending on staff and funding, on-going, when opportunities arise, constantly, never, by demand, as suggested or noticed, bi-monthly.

<sup>36</sup> *An Overview of Tourism in Northern Ontario*, FedNor, 2004

<sup>37</sup> *An Overview of Tourism in Northern Ontario*, FedNor, 2004

### Element 3: Managing within Carrying Capacities

The **Managing within Carrying Capacities** element assesses the extent to which the destination is aware of and manages within the capacity thresholds of its:

- local economy
- ecosystems setting and soft services infrastructure
- guest satisfaction levels
- hard services infrastructure
- administrative systems

Thunder Bay currently has considerably fewer houses available for sale than it had two years ago, resulting in a significant sellers' market. It is estimated that the number of houses available for sale is as much as 50% lower than two years ago. This is primarily due to high mortgage rates, a lack of new apartments and a shortage of skilled trades people. Retirement purchases by people moving from other provinces are estimated to contribute to about 50% of current Thunder Bay housing sales. In spite of this, Thunder Bay and the region still offer some of the lowest housing prices in Canada. The marketing of these prices and the quality of life offered in the region have been factors in people moving to Thunder Bay and the North Superior Region to retire.

To address housing shortage issues in Thunder Bay and the region, a concerted effort is being made by the regional training board, North Superior Training Board and others to encourage youth to enter into the skilled trades.

Trained labor is available throughout the region to serve visitation demands at a level that maintains guest satisfaction and will meet guest expectations in the future. 66.3% of all tourism operators surveyed believed that they have enough of a trained labor pool to support their business over the longer term.

Guest surveys confirm satisfaction with hospitality and service, with 98.2% of visitors surveyed assessing the region as being "hospitable and friendly". Some visitors, however, expressed the concern that front line staff are not as aware of what the region has to offer visitors as they should be. Training seasonal tourism staff can be challenging given the time that is available for training as well as staff turnover. Regional tourism operators should be encouraged to use NOSTA's new web site, the City of Thunder Bay and other Municipal web sites and others as appropriate to train staff to provide them with more of the tools they need to meet the requirements of visitors.

---

#### *Recommendation Twenty-Three/Futurity/Staff Training:*

*That tourism operators be encouraged to utilize their DMO's web sites to facilitate staff training.*

---

Carrying capacities of the natural systems that sustain local ecosystems and quality of life are not overwhelmed by destination visitation particularly in light of the fact that visitation has been in a state of decline recently. Through the Ontario Ministry of Natural Resources, there is an environmental monitoring program in place which provides early warning that the quality of the resources or the visitor experience is at risk of being impaired.

The four main pieces of legislation in place with respect to monitoring the local ecosystems are the Provincial Parks Conservation Reserves Act, the Public Lands Act, the Lakes and Rivers Improvement Act and the Fish and Wildlife Conservation Act. There is a custodial management program in place that ensures that sites are visited regularly to determine that there are no unauthorized resource harvesting and no unauthorized occupations. The MNR Enforcement Program looks at harvest pressure associated with hunting and fishing while the Ministry's biologists routinely do fisheries assessment work, with active monitoring programs on high use recreational fisheries. In addition, biologists do population assessment on moose, deer and bear populations as well as trap lines.

---

In addition, using stringent regulations, targeted enforcement and a variety of programs and initiatives, the Ontario Ministry of the Environment deals with environmental issues that have local, regional and/or global effects. The Ministry is responsible for protecting clean and safe air, land and water to ensure healthy communities, ecological protection and sustainable development.

The Lakehead Region Conservation Authority also provides additional resource management for its member Municipalities.

To date, evidence indicates that no capacity/thresholds are being exceeded although monitoring on some high use recreational fisheries is ongoing. In addition, it is widely believed there are no current issues around water treatment and delivery, sewage treatment and trunk and road, transit (where offered), parking and trail capacity to accommodate current and projected levels of visitation, at least in the short to mid-term.

Overall overcrowding, overuse, diminished quality of the environment or diminished quality of the guest experience are not being raised as issues by guests surveys or by managers of facilities and resources. While infrastructure is available to accommodate current or projected levels of demand without exceeding carrying capacities, visitors to the region have expressed concerns about some aspects of the region's infrastructure. These issues include<sup>38</sup>:

#### Transportation

- There is the need to upgrade (four lanes, repairs, passing lanes) regional highways and twin the Trans-Canada Highway
- The relatively high cost of air travel
- A shortage of full service marinas
- There is a high volume of transport truck traffic
- Grooming of snowmobile trails is inconsistent

#### Amenities

- Infrastructure needs such as rest stops, wheelchair access, appropriate signage and trails are lacking....For those that do exist, substantial investment in upgrading is needed
- Visitor centres need to be open to the public longer

#### Telecommunications

- Northern Ontario's telecommunications infrastructure and industry has grown in recent years but is still experiencing spotty cell phone coverage, the lack of high speed Internet and expensive long distance charges

#### Accommodations

- Accommodations, especially outside of major centers, are needed especially to host conventions and events

---

#### *Recommendation Twenty-Four/Futurity/Infrastructure:*

*Pursue opportunities for regional community tourism development through the newly-announced Federal-Provincial Infrastructure agreement for communities under 100,000.*

---

Assessments of the environmental effects of infrastructure expansions are completed, with effects considered manageable and acceptable. Municipal entities with approval authority are generally able to address development applications in a timely manner, with sufficient administrative resources in place to efficiently manage permit processes.

---

<sup>38</sup> NCIR Survey, Inventory and Gap Analysis, Forrest Marketing + Communications, 2008

There is considerable political will throughout Northwestern Ontario, including the North of Superior region, to develop tourism. This is evidenced by the Northwestern Ontario Common Voice Initiative which was undertaken by the Northwestern Ontario Municipal Association to engage and mobilize the citizens of Northwestern Ontario to "chart their own course within the Province and the Country by addressing regional challenges with realistic Northern solutions".

The Common Voice has been working to identify, promote and develop economic opportunities in and for Northwestern Ontario, entering into dialogues with all residents and interest groups of the region to determine those projects that should be undertaken as a priority.

Early in the process, Common Voice engaged the expertise of regional leaders within identified industries and challenged areas to form Task Forces or Regional Committees to identify the issues and create action plans. A Northwestern Ontario Regional Tourism Council (NWORTC) with the mandate of "developing and fostering a Northwestern Ontario tourism strategy which addresses key issues, including planning, policy and product development" was formed in the fall of 2007.

Members of the NWORTC developed a 14-item issues list that was then prioritized, resulting in a list of the following priority issues:

- The roles and funding of tourism organizations and agencies
- Border issues
- The state of tourism infrastructure
- Land use issues
- Marketing effectiveness
- Tourism product development

With respect to these priority issues, the Council commissioned a report to research these issues and report on recommended actions to Common Voice. The report, *NCIR Tourism Survey, Inventory and Gap Analysis, Phase I*, was delivered to Common Voice in the late spring of 2008 and is now under review.

Political will to enhance tourism can be strengthened further by taking steps to bolster public support of the regional tourism industry. The first step in this process will be to enhance awareness throughout the region of the value and importance of tourism to the economy.

---

*Recommendation Twenty-Five/Futurity/Awareness:*

*Implement a region-wide campaign about the importance of tourism. This may include community-based tourism trade shows.*

---

*Recommendation Twenty-Six/Futurity/Corridor Standard:*

*Support the recommendation contained in the Preparing for Change report that "a 10-year action plan be developed and resourced to develop a corridor standard for Highway 11/17 that is attractive, caters to travellers' needs for signage, rest areas and viewing points and provides an anticipated level of highway design standard and service."*

---

*Recommendation Twenty-Seven/Futurity/Visitor Centres:*

*Implement a campaign seeking older adult volunteers for visitor centres in order to help keep centres open longer and later. In addition, it is anticipated that many older adults would have a great deal of knowledge of the region.*

---

## CONCLUSIONS

---

Through the Premier Ranked Tourist Destination Process in the North of Superior region, an extensive profile of the region's tourism industry has been developed. This profile should be able to play a very useful role in regional tourism planning well into the future.

The process identified gaps and weaknesses through the three dimensions while at the same time pinpointing specific strengths and opportunities. Initial meetings conducted around the findings of the Draft Report were successful in identifying numerous ways to address the region's gaps while making the most of its strengths.

The chart on page 63 summarizes the region's results across the Product, Performance and Futurity dimensions.

The first step in completing the chart was to record a symbol beside each criterion (e.g., A1) on the basis of the responses made for each of their measures (e.g., A1.i to x). Where a criterion is assessed by one measure only, it receives the same result as was recorded for the measure. Similarly, where all measures for a particular criterion have the same response, the criterion takes that result as well. Where there are two or more measures with different results for a particular criterion, judgment is required to decide what result to record for the criterion. The decision weighs the number and relative importance of each measure. Where there are two measures with differing results, the criterion is given the symbol that logic and the region's circumstances suggest are the most appropriate. Where there are three or more measures, the majority generally rules unless specific circumstances suggest more weight should be given to particular measures or results. No criterion can have a more positive result than that of its measures; i.e., if a criterion's measures are all given "Almost" (A) ratings, it should not be possible to rationalize a "Yes" (Y) result for the criterion.

The next step is to record a symbol beside each element (e.g. A. Distinctive Core Attractions) on the basis of the responses made for each of their supporting criteria (e.g. A1 & A2). The process of extending the criteria level results up the Framework hierarchy to the element level requires more judgment than in the previous step. The same rules, however, apply. As in the first step, where all criteria for an element have the same response, the element is given that result as well. Where there is variation among the symbols recorded for each criterion, judgment again guides the affirmation that is made and recorded for the element. The selection of which response to record takes into account the number and relative importance of each of the supporting criteria.

The third step entails an assessment of the affirmations made for the elements comprising each dimension, and making a judgment as to what response to record for each of the Product, Performance and Futurity dimensions. The same guidelines that are utilized for the first two steps apply. Ultimately, performance on the dimensions level is weighed by the extent to which the destination can affirm that it does fulfill the stated expectations, i.e., that it does fulfill:

- Product expectations, through providing a high quality tourist experience as enabled by its offering's elements;
- Performance expectations, by having its success in offering that high quality tourist experience validated by its performance elements; and
- Futurity expectations, by having its ability to manage its future success affirmed

Given this assessment of performance against each dimension, the determination of whether the region can be deemed to be among the Premier-Ranked or among the best-managed can be made.

Achieving Premier-Ranked Tourist Destination status requires:

- a "Yes" response for the Product dimension;
- a "Yes" response for the Performance dimension; and
- a "Yes" response for two of the three elements supporting the Futurity dimension.



As shown below, while the North of Superior region did receive a "Yes" in both the Product and Futurity dimensions, it was given an "Almost" in the Performance dimension due to issues around visitation, occupancy and yield. As well, a number of weaknesses to be addressed were identified in these dimensions. Recommended steps to address the weaknesses that have been identified are contained in the "Future Direction" section of this Report.

**PREMIER-RANKED TOURIST DESTINATION A**

**PRODUCT Y**

**A. Distinctive Core Attraction Y**

<b>A1 Y</b>	<b>A2 Y</b>
A1.i Y	A2.i Y
A1.ii Y	A2.ii Y
A1.iii Y	A2.iii Y
A1.iv Y	A2.iv Y
A1.v Y	A2.v A
A1.vi Y	
A1.vii Y	
A1.viii Y	
A1.ix A	
A1.x Y	

**B. Quality and Critical Mass Y**

<b>B1 Y</b>	<b>B4 A</b>	<b>B6 A</b>
B1.i Y	B4.i A	B6.i Y
B1.ii A	B4.ii A	B6.ii A
B1.iii A	B4.iii A	B6.iii Y
B1.iv Y	B4.iv N	B6.iv A

<b>B2 Y</b>	<b>B5 Y</b>	<b>B7 Y</b>
B2.i A	B5.i Y	B7.i Y
B2.ii Y	B5.ii Y	B7.ii Y

<b>B3 A</b>
B3.i A
B3.ii A

**C. Satisfaction and Value A**

<b>C1 Y</b>	<b>C2 N</b>	<b>C3 A</b>
C1.i Y	C2.i N	C3.i N
	C2.ii N	C3.ii Y
		C3.iii N

**D. Accessibility Y**

<b>D1 A</b>	<b>D3 Y</b>	<b>D4 Y</b>
D1.i N	D3.i N	D4.i Y
D1.ii A	D3.ii Y	D4.ii Y
D1.iii A	D3.iii Y	
D1.iv Y	D3.iv Y	
D1.v A		

<b>D2 A</b>
D2.i A
D2.ii A

**E. An Accommodation Base A**

<b>E1 A</b>
E1.i A
E1.ii A
E1.iii Y

**PERFORMANCE A**

**F. Visitation A**

<b>F1 N</b>	<b>F2 Y</b>	<b>F3 Y</b>
F1.i N	F2.i Y	F3.i Y
F1.ii N		
F1.iii Y		
F1.iv Y		
F1.v N		
F1.vi A		
F1.vii N		
F1.viii N		

**G. Occupancy and Yield N**

<b>G1 Y</b>	<b>G2 N</b>
G1.i Y	G2.i N
G1.ii Y	G2.ii N
	G2.iii N
	G2.iv N

**H. Critical Acclaim Y**

<b>H1 Y</b>	<b>H2 Y</b>	<b>H3 A</b>
H1.i A	H2.i Y	H3.i A
H1.ii Y		H3.ii A

**Futurity Y**

**I. Destination Marketing A**

<b>I1 Y</b>	<b>I3 Y</b>	<b>I5 A</b>
I1.i Y	I3.i Y	I5.i A
I1.ii Y	I3.ii Y	
<b>I2 A</b>	<b>I4 A</b>	<b>I6 A</b>
I2.i Y	I4.i A	I6.i A
I2.ii N		
I2.iii N		

**J. Product Renewal Y**

<b>J1 Y</b>	<b>J2 Y</b>
J1.i Y	J2.i Y
J1.ii Y	J2.ii Y
J1.iii Y	

**K. Managing w/ Carrying Capacities Y**

<b>K1 Y</b>	<b>K4 A</b>	<b>K6 A</b>
K1.i Y	K4.i Y	K6.i A
K1.ii N/A	K4.ii N	K6.ii A
	K4.iii N/A	K6.iii N
	K4.iv N/A	K6.iv Y
<b>K2 Y</b>	<b>K5 Y</b>	<b>K7 A</b>
K2.i Y	K5.i Y	K7.i A
K2.ii N/A	K5.ii N/A	K7.ii Y
K2.iii Y	K5.iii N/A	K7.iii A
K2.iv N/A		
<b>K3 Y</b>		
K3.i Y		
K3.ii N/A		
K3.iii Y		
K3.iv N/A		

Yes	<b>Y</b>	Yes, the affirmation can be made and supported for the destination
A	<b>A</b>	The affirmation can almost be made and supported – one to several key efforts / investments will enable affirmation
No	<b>N</b>	No, the affirmation cannot be made/supported for the destination

# SUMMARY OF FINDINGS

## Product

### 1. Core and Supporting Attractions

- The region has numerous appealing natural and built/managed Core Attractions catering to all market segments and offering, to some degree, year-round experiences. All of the Core Attractions are linked physically or historically to the region.
- The region's Supporting Attractions complement the Core Attractions and offer opportunities for supporting the development of packages and themed routes.
- Weaknesses in the Core Attractions base include the absence of a Core Attraction in the region itself (outside of Thunder Bay) and a lack of products that can attract visitors in the winter season.
- Key opportunities include the development of more festivals and events such as Aboriginal festivals and pow wows as well as the opportunity to develop more learning experiences to complement and extend visits.

### 2. Quality and Critical Mass

- By far the greatest percentage of visitors (65.9%) stays longer than a day.
- The region offers a range of memorable experiences, creating core and on-theme activities sufficient to sustain tourist interest on a year-round basis, though primarily in the spring and summer months.
- While the region offers a range of dining options, most of the higher end experiences are located within Thunder Bay.
- The region has a number of accredited chefs, however, offering some possibilities to expand the dining offerings.
- Cultural experiences are more equitably distributed throughout the region.
- Operators primarily offer "relaxation" but are less inclined to provide opportunities for learning.

### 3. Satisfaction and Value

- 98.2% of visitors said that they found the region to be hospitable and friendly.
- Today's consumers are increasingly demanding quality and demonstrated value. Because North of Superior is more expensive to get to than many other destinations, marketers need to be clear about the value proposition offered to the target markets, emphasizing what is unique and most appealing.

### 4. Accessibility

- While vast and remote, Thunder Bay's position at the centre of Canada offers opportunities to entice those on a cross-country trip to visit.
- 91.8% of visitors feel that it is easy to travel within the region. Of those who had concerns about travel in the region, comments tended to centre around the following issues:
  - Delays due to highway and related construction
  - Not enough (or in many cases not clean enough) rest stops / pull over areas / washrooms
  - Not enough paved areas for bicycling
  - Inadequate number of passing lanes

- Lack of four-laned highways
- Lack of chain accommodations
- Lack of travel centres or not enough travel centres open later

## 5. Accommodations Base

- The region offers a range of accommodations options but, again, most of the higher end options are found within the City of Thunder Bay.

## Performance

### 1. Visitation

- The region does not attract a significant share of the total visits to Ontario which included activities relying on the destination's core attractions classes. The total visits to the North of Superior region in 2004 were 1.4% of the Ontario total of 94,227,829. This is due to a number of factors, including the region's isolation from major population centres.
- The region is, however, an important component of what Ontario can promote to potential visitors, offering authentic outdoor and cultural experiences.
- The majority of the visitors to the North of Superior region in 2004 were from Ontario, accounting for 67% of the total visitation to the area that year. U.S. visitors accounted for 24% and visitors from other Canadian provinces accounted for 8%.
- The top five markets to visit the region were Thunder Bay District (49%), Minnesota (7%), Michigan (5%), Wisconsin (3%) and York Regional Municipality.
- Business visitors to the region in 2004 contributed 4% of the total visitation. While Thunder Bay currently attracts significant numbers of meetings and conventions and is attempting to capture more with a focused strategy, the region lacks the capacity to host many of these types of events.
- The region's offering draws from multiple market segments, attracting visitors with different visitor profiles.
- While the region is a four-season destination to some extent, visitors are most likely to arrive in the summer months (44%).

### 2. Occupancy and Yield

- Guest visits and expenditures make a net positive and significant contribution to the economy of the North of Superior region. Same-day and overnight visitors spent \$232,107,899 in the North of Superior Region on tourism related expenditures/categories including lodging, food and beverage, transportation, entertainment, and retail during 2006.
- Spending by both overnight visitors and day trippers is higher than the provincial average. Spending by those on day trips in the region in 2006, for example, was \$183.87 compared to \$97.18 for the province.
- Total spending is, however, much lower than the provincial total. Total visitor spending in the region in 2006 was \$232,107,899 compared to \$17,694,051,216 for the province.

*"Need better public transportation."*  
-Tourist Operator

### 3. Critical Acclaim

- Northwestern Ontario (and to a somewhat lesser extent the North of Superior region) has long been considered a "must see / must do" location for fishing and hunting products.
- The region has also gained recognition through the Lake Superior Circle Tour. In addition, Lake Superior itself is a widely-recognized icon as the world's largest freshwater lake and the home of the legendary Sleeping Giant, a People's Choice Winner in the CBC's recent Seven Wonders of Canada contest.
- Destination imagery of, and/or text about the North of Superior region or its Core Attraction(s), is used in promoting Ontario.
- The Canadian Tourism Commission does not list any Northern Ontario experiences in its "Top Things to do in Ontario" section and does not, in fact, appear to discuss Northern Ontario anywhere on its site.
- Two of the region's attractions, Fort William Historical Park (Thunder Bay) and Amethyst Mine Panorama (Dorion) have been ranked "Best in Class" or "Top Tier" in consumer or industry rankings.

## Futurity

### 1. Destination Marketing

- Visitors say the region has many strengths including:
  - Natural beauty, Sleeping Giant, landscapes, scenery, nature, outdoors, forests, Lake Superior
  - Fishing/hunting
  - Aboriginal culture
  - Outdoor recreation
  - Snowmobiling
- Travel to the region has recently been declining but future demand for Northern Ontario products has been predicted in several reports.
- The regional DMO is North of Superior Tourism Association, funded at a level of \$450,000 with about 45% allocated towards marketing/communications.
- North of Superior Tourism Association is currently finalizing its 2009-2011 Regional Strategic Business Plan and Marketing Plan. The focus of this plan is primarily on marketing, tracking and membership recruitment.
- There are also numerous municipal DMOs in the region including Tourism Thunder Bay.
- In order to assess the progress of the marketing plan, NOSTA has established a marketing measurement system.
- 68% of tourism operators in the North of Superior region provide customer service training programs.

### 2. Product Renewal

- 33.5% of the businesses who responded to the survey reported that their business had decreased but considerable reinvestment and new investment is nonetheless still occurring in the region to enhance, revitalize or develop facilities relevant to the quality of the tourist experience.
- The largest percentage had invested between \$10,000 and \$50,000 in the last two years.
- A considerable number (8.1% and 11.3% respectively) had invested over one million dollars.
- There are numerous examples both in Thunder Bay and the region of the Core Attractions making investments to enhance their appeal to visitors and their ability to attract new visitors.

### 3. Carrying Capacity

- 66.3% of all tourism operators surveyed say that they have enough of a trained labor pool to support their business over the longer term.
- Guest surveys confirm satisfaction with hospitality and service; 98.2% of visitors surveyed assessed the region as being "hospitable and friendly".
- Carrying capacities of the natural systems that sustain local ecosystems and quality of life are not overwhelmed by destination visitation particularly in light of the fact that visitation has been in decline recently.
- In addition, it is widely believed that there are no current issues around water treatment and delivery, sewage treatment and trunk and road, transit (where offered), parking and trail capacity to accommodate current and projected levels of visitation, at least in the short to mid-term.
- Overall overcrowding, overuse, diminished quality of the environment or diminished quality of the guest experience are not being raised as issues by guests surveys or by managers of facilities and resources.
- Visitors to the region have expressed concerns about some aspects of the region's infrastructure including roads and rest stops.
- There is considerable political will throughout Northwestern Ontario, including the North of Superior Region, to develop tourism. This is evidenced by the recent creation of the Northwestern Ontario Regional Tourism Council under The Northwestern Ontario Common Voice Initiative.

---

*Recommendation Forty-Five/Conclusion/Baseline Document:*

*That this Premier Ranked Tourist Destination Process in the North of Superior Region Final Report be used as the baseline for the development of a Regional Tourism Strategic Plan for the entire North of Superior region to include but not limited to marketing, education, product development and research.*

---



*Lake Superior shore between Terrace Bay and Schreiber*

***"Keep Ontario Provincial Parks open until November."  
-Tourist Operator***

## **SUMMARY OF RECOMMENDATIONS**

The PRTD Process has produced a list of recommendations, as well as identified gaps through the research phase of the PRTD Process, developed from input from both visitors and stakeholders. These recommendations are:

### **Recommendation One/Product/Snowmobile Trail Development:**

That NOSSA, with the appropriate partners, seek funding to complete all missing trail linkages within the North of Superior region.

### **Recommendation Two/Product/Non-operating parks:**

That regional municipalities be encouraged to assume the operational responsibility for key non-operating parks in the region where practical.

### **Recommendation Three/Product/Funding:**

Access to low cost loans seems to be an issue for tourism businesses in Northern Ontario. Further investigation should be undertaken to see why this is the case, what the roadblocks are and identify solutions that are attainable.

### **Recommendation Four/Product/Packaging and Bundling (First Nations):**

That packaging and bundling of products/experiences be further developed between tourist operators, regional communities and First Nations to enhance the region's critical mass of things to see and do and therefore strengthening partnerships and alliances.

### **Recommendation Five/Product/Packaging and Marketing:**

Work with OTMPC Northern Portal project to package and market cultural products and experiences that are intrinsically linked to the region.

### **Recommendation Six/Product/Trail Maintenance and Policing:**

That discussions be pursued with different levels of government to assume responsibility for the development, maintenance and policing of the region's snowmobile trails.

### **Recommendation Seven/Product/Best Practices:**

Feature success stories and best practices on the regional DMO (NOSTA) and other web sites.

### **Recommendation Eight/Product/Touring Routes:**

Develop touring routes such as Economuseum® routes (artisans and agri-food businesses), culturally and historically themed routes, etc.

### **Recommendation Nine/Product/Waterfront:**

Consistent with promoting the City of Thunder Bay's historic and modern connection to Lake Superior and with respect to tourism values of well developed urban waterfronts, the sustainable development of Thunder Bay's waterfront with a mixed use plan based on solid public/private partnerships should continue to provide new recreational and economic benefits to the community. It should also serve to expand the range of activities necessary to retain visitors within the community for a longer period and therefore increase the economic impact of the tourism sector for the community and region. As such, it should be endorsed by the local and regional tourism industry.

### **Recommendation Ten/Product/Mapping:**

Asset mapping projects, such as the ones being undertaken by the City of Thunder Bay and Geraldton Community Forest, along with the data collected through this process and in the recently published motorcycle and RV touring reports, offer opportunities to identify gaps and develop strategic plans. Extending the mapping of assets further into the region should therefore be considered a priority.

**Recommendation Eleven/Product/Data Storage:**

The PRTD Process data should be stored in a format that is easy to update and updated regularly, using a system such as Inmagic DBText, WebPublisher PRO.

**Recommendation Twelve/Product/Aboriginal Tourism:**

In light of the consumer demand for authentic products and in particular Aboriginal products, the recommendations contained in the Aboriginal Tourism Section of this report should be pursued.

**Recommendation Thirteen/Product/Positioning:**

All of the region's competitors promote virtually the same products as the North of Superior region. It is recommended that those who promote the region clearly differentiate the North of Superior products, including communicating what there is to see and do beyond hunting and fishing.

**Recommendation Fourteen/Product/Positioning:**

The positioning statements contained in the 2009-2011 NOSTA Strategic Business and Marketing Plan are useful in that they communicate some of the aspects that are unique in the NOSTA region. They should be used as a guideline to ensure that the region is viewed as being distinctive by potential visitors.

**Recommendation Fifteen/Product/Internet Pilot Project:**

Endorse the *Preparing for Change* recommendation for a three year Internet pilot project.

**Recommendation Sixteen/Product/Training:**

Through Tourism Keys, or another provider, make available a program to include training on using the Internet to market as well as to facilitate online bookings and purchases.

**Recommendation Seventeen/Product/OTMPC Site:**

Look for opportunities to cascade more effectively from the OTMPC site.

**Recommendation Eighteen/Product/Internet Access:**

Seek funding to provide access to the Internet for visitors in all of the region's tourist bureaus.

**Recommendation Nineteen/Product/Five Year Plan:**

The opportunities identified in the Product Opportunities chart, along with the recommendations contained in this report and within the appendices have been summarized with proposed timelines, forming the basis of a Five-Year Strategic Tourism Development Plan for the region. This plan should be implemented in a timely manner to help to support the growth of tourism in the North of Superior region.

**Recommendation Twenty/Product/Regional Cuisine:**

Form a working group of chefs to discuss ways to develop and implement a regional cuisine product.

**Recommendation Twenty-One/Product/Survey Template:**

That a template for a visitor satisfaction survey be provided as part of the North of Superior Tourism Association's membership package.

**Recommendation Twenty-Two/Performance/CTC:**

Strengthen communications with the Canadian Tourism Commission to ensure that Northern Ontario has a presence on their web site. This may be achieved through the provision of information on one or more of their "focus" areas such as Aboriginal and sports tourism.

**Recommendation Twenty-Three/Futurity/Staff Training:**

That tourism operators be encouraged to utilize their DMO's web sites to facilitate staff training.

**Recommendation Twenty-Four/Futurity/Infrastructure:**

Pursue opportunities for regional community tourism development through the newly-announced Federal-Provincial Infrastructure agreement for communities under 100,000.

**Recommendation Twenty-Five/Futurity/Awareness:**

Implement a region-wide campaign about the importance of tourism. This may include community-based tourism trade shows.

**Recommendation Twenty-Six/Futurity/Corridor Standard:**

Support the recommendation contained in the *Preparing for Change* report that "a 10-year action plan be developed and resourced to develop a corridor standard for Highway 11/17 that is attractive, caters to travellers' needs for signage, rest areas and viewing points and provides an anticipated level of highway design standard and service."

**Recommendation Twenty-Seven/Futurity/Visitor Centres:**

Implement a campaign seeking older adult volunteers for visitor centres in order to help keep centres open longer and later. In addition, it is anticipated that many older adults would have a great deal of knowledge of the region.

**Visitor Analysis Recommendations**

**Recommendation Twenty-Eight/Visitor Recommendation/Signage:** That communities be made aware of the importance of having compelling entranceway and other signage to encourage visitors who are passing through to stop and visit and that guidance and financial assistance be provided to these communities to develop a signage program. An example of an area that has developed templates for appealing signage to encourage tourists to visit is Greenstone's proposed "Spirit of the North" touring signage.

**Recommendation Twenty-Nine/Visitor Recommendation/Accessibility:**

That the North of Superior region improve accessibility for persons with disabilities.

**Recommendation Thirty/Visitor Recommendation/Culture and History:**

That the North of Superior region provide more opportunities for visitors to learn about the region's Aboriginal culture and history.

**Recommendation Thirty-One/Visitor Recommendation/RV Accommodations:**

That the North of Superior region expand its RV accommodations.

**Recommendation Thirty-Two/Visitor Recommendation/Packaged and Bundled Products:**

That the North of Superior region provide more packaged/bundled products for visitors.

**Recommendation Thirty-Three/Visitor Recommendation/Hiking and Aboriginal Walks:**

That the North of Superior region create additional (and/or increase promotion of) hiking and Aboriginal walks.

**Recommendation Thirty-Four/Visitor Recommendation/Visitor Needs:**

That the North of Superior region attempt to cater more fully to visitor needs including developing/improving rest stops, enhancing accommodations and dining and providing the latest in technological communications.

**Aboriginal Analysis Recommendations****Recommendation Thirty-Five/Aboriginal Tourism/Inventory:**

A collaborative effort should be made to more fully research and catalogue the region's Aboriginal tourism product and develop strategies to develop and promote what is offered.

**Recommendation Thirty-Six/Aboriginal Tourism/Training:**

Small business management training should be extended to more Aboriginal tourism businesses to aid in the organization of their businesses and to help them to plan for future growth. This may best be accomplished working with Economic Development Officers in Aboriginal communities.



**Recommendation Thirty-Seven/Aboriginal Tourism/Partnerships:**

Partnership efforts should be created amongst all business owners, including Aboriginal business owners, for the purpose of sharing resources and expertise as well as diminishing the costs associated with advertising and marketing.

**Recommendation Thirty-Eight/Aboriginal Tourism/Infrastructure:**

First Nations communities should identify infrastructure priorities that may be required to develop longer term tourist products.

**Recommendation Thirty-Nine/Aboriginal Tourism/Technology:**

Aboriginal tourism business owners need to look at investing in utilizing the Internet to effectively market and sell their products/experiences.

**Recommendation Forty/Aboriginal Tourism/Marketing:**

More aggressive marketing efforts should be made within the Aboriginal business community (or partnerships of businesses to lower cost) to showcase their unique cultural experiences and handmade items and implement a way of tracking return on investment.

**Ontario Parks Recommendations****Recommendation Forty-One/Ontario Parks/Marketing:**

It is recommended that Ontario Parks takes into consideration the data derived from the PRTD Process during the development of future marketing strategies.

**Recommendation Forty-Two/Ontario Parks/Product Opportunities:**

It is recommended that Ontario Parks takes into consideration the product opportunities identified during the PRTD Process during the review of existing and future park operations.

**Sports Tourism Recommendations****Recommendation Forty-Three/Sports Tourism/Technology:**

Representatives of sporting events and facilities should investigate opportunities to enhance the use of technology to better promote events, provide online registration, and to publish scores and event results.

**Recommendation Forty-Four/Sports Tourism/Importance:**

That the City of Thunder Bay and other communities within the North of Superior region continue to look at sports tourism as a way of attracting a higher number of visitors and focus on developing the facilities, capacity and ability to host such events.

**Conclusion Recommendation****Recommendation Forty-Five/Conclusion/Baseline Document:**

That this Premier Ranked Tourist Destination Process in the North of Superior region Final Report be used as the baseline for the development of a Regional Tourism Strategic Plan for the entire North of Superior region to include but not limited to marketing, education, product development and research.

*"Our area needs to focus on helping people to connect and develop."*

**-Tourist Operator**

## FUTURE DIRECTION

While the process to develop the foregoing list of recommendations has been lengthy and complex, determining how to best implement these recommendations also presents significant challenges.

A recurring issue is who will lead the proposed project and where the funding will come from.

A review of the mandates of the relevant tourism associations and partner groups will help to determine who is best suited to play a lead role in implementing the recommendations contained in this report. In reviewing the mandates, several issues are highlighted:

- Numerous Government Ministries are involved in tourism marketing and development for Northwestern Ontario including the Ministry of Natural Resources, the Ministry of Transportation, the Northern Ontario Heritage Fund Corporation and the Ministry of Tourism, among others. Previous reports have pointed to the need to have a "lead" Ministry for tourism in the North.
- While the Northwestern Ontario Tourism Marketing Council is mandated through NOMA and the Common Voice Northwest to spearhead the development of a regional tourism strategy, it is not at this time staffed or funded. It has, however, recently completed a tourism inventory and gap analysis for the region.
- There is no lead agency for tourism development and training for the region. NOSTA had up until recently attempted to fill this void but its new three year strategic plan clearly delineates its responsibilities as being marketing and member services. Many stakeholders believe this is a key barrier to building tourism in the region.
- The Strategic Tourism Marketing Partnership primarily receives proposals for tourism projects through the Northern and Outdoor Committees of OTMPC.
- Similarly, the projects that might be supported by the CFDCs will need a proponent(s).

The following is an overview of the mandates of the various agencies, departments and organizations along with the recommendations that could fit with their mandates. It should be noted that these organizations have not been contacted regarding these recommendations and have in no way agreed at this time to be the lead agency responsible for these recommendations.

### Community Futures Development Corporations (CFDCs)

Funded by FedNor, CFDCs are community-based, non-profit organizations which support community economic development by assisting communities located within their catchment area to strengthen and diversify their economies. Superior North CFDC and Thunder Bay Ventures are the region's CFDCs.

The recommendations in this Report that could fall within the mandate of the region's CFDCs are:

- Recommendation Eighteen/Product/Internet Access:  
Seek funding to provide access to the Internet for visitors in all of the region's tourist bureaus.
- Recommendation Twenty/Product/Regional Cuisine:  
Form a working group of chefs to discuss ways to develop and implement a regional cuisine product.

*"Catalogue of free advertising opportunities  
needs to be made accessible."  
-Tourist Operator*

## The Region's other Destination Marketing Organizations (DMOs) and Economic Development Offices (EDOs)

The region's other DMOs include Municipal departments, Chambers of Commerce and First Nations DMOs and EDOs.

The recommendations in this Report that could fall within the mandate of the region's DMOs and EDOs are:

- Recommendation Two/Product/Non-operating parks:  
That regional municipalities be encouraged to assume the operational responsibility for key non-operating parks in the region where practical.
- Recommendation Four/Product/Packaging and Bundling (First Nations):  
That packaging and bundling of products/experiences be further developed between tourist operators, regional communities and First Nations to enhance the region's critical mass of things to see and do and therefore strengthening partnerships and alliances.
- Recommendation Seven/Product/Best Practices:  
Feature success stories and best practices on the regional DMO (NOSTA) and other web sites.
- Recommendation Nine/Product/Waterfront:  
Consistent with promoting the City of Thunder Bay's historic and modern connection to Lake Superior and with respect to tourism values of well developed urban waterfronts, the sustainable development of Thunder Bay's waterfront with a mixed use plan based on solid public/private partnerships should continue to provide new recreational and economic benefits to the community. It should also serve to expand the range of activities necessary to retain visitors within the community for a longer period and therefore increase the economic impact of the tourism sector for the community and region. As such, it should be endorsed by the local and regional tourism industry.
- Recommendation Twelve/Product/Aboriginal Tourism:  
In light of the consumer demand for authentic products and in particular Aboriginal products, the recommendations contained in the Aboriginal Tourism Section of this report should be pursued.
- Recommendation Thirteen/Product/Positioning:  
All of the region's competitors promote virtually the same products as the North of Superior region. It is recommended that those who promote the region clearly differentiate the North of Superior products, including communicating what there is to see and do beyond hunting and fishing.
- Recommendation Fourteen/Product/Positioning:  
The positioning statements contained in the 2009-2011 NOSTA Strategic Business and Marketing Plan are useful in that they communicate some of the aspects that are unique in the NOSTA region. They should be used as a guideline to ensure that the region is viewed as being distinctive by potential visitors.
- Recommendation Twenty-Two/Performance/CTC:  
Strengthen communications with the Canadian Tourism Commission to ensure that Northern Ontario has a presence on their web site. This may be achieved through the provision of information on one or more of their "focus" areas such as Aboriginal and sports tourism.
- Recommendation Twenty-Four/Futurity/Infrastructure:  
Pursue opportunities for regional community tourism development through the newly-announced Federal-Provincial Infrastructure agreement for communities under 100,000.
- Recommendation Twenty-Seven/Futurity/Visitor Centres:  
Implement a campaign seeking older adult volunteers for visitor centres in order to help keep centres open longer and later. In addition, it is anticipated that many older adults would have a great deal of knowledge of the region.

- Recommendation Twenty-Nine/Visitor Recommendation/Accessibility:  
That the North of Superior region improve accessibility for persons with disabilities.
- Recommendation Thirty/Visitor Recommendation/Culture and History:  
That the North of Superior region provide more opportunities for visitors to learn about the region's Aboriginal culture and history.
- Recommendation Thirty-One/Visitor Recommendation/RV Accommodations:  
That the North of Superior region expand its RV accommodations.
- Recommendation Thirty-Three/Visitor Recommendation/Hiking and Aboriginal Walks:  
That the North of Superior region create additional (and/or increase promotion of) hiking and Aboriginal walks.
- Recommendation Thirty-Five/Aboriginal Tourism/Inventory:  
A collaborative effort should be made to more fully research and catalogue the region's Aboriginal tourism product and develop strategies to develop and promote what is offered.
- Recommendation Thirty-Six/Aboriginal Tourism/Training:  
Small business management training should be extended to more Aboriginal tourism businesses to aid in the organization of their businesses and to help them to plan for future growth. This may best be accomplished working with Economic Development Officers in Aboriginal communities.
- Recommendation Thirty-Seven/Aboriginal Tourism/Partnerships:  
Partnership efforts should be created amongst all business owners, including Aboriginal business owners, for the purpose of sharing resources and expertise as well as diminishing the costs associated with advertising and marketing.
- Recommendation Thirty-Eight/Aboriginal Tourism/Infrastructure:  
First Nations communities should identify infrastructure priorities that may be required to develop longer term tourist products.
- Recommendation Forty-Three/Sports Tourism/Technology:  
Representatives of sporting events and facilities should investigate opportunities to enhance the use of technology to better promote events, provide online registration, and to publish scores and event results.
- Recommendation Forty-Four/Sports Tourism/Importance:  
That the City of Thunder Bay and other communities within the North of Superior region continue to look at sports tourism as a way of attracting a higher number of visitors and focus on developing the facilities, capacity and ability to host such events.

## **Northern Ontario Native Tourism Association (NONTA)**

NONTA is a non-profit organization working with its members to build new Native tourism businesses and to create new tourism jobs.

NONTA's mandate is to help its members by:

1. Offering advice and assistance about which tourism opportunities may be best for them;
2. Providing advice and assistance about how to best manage First Nations tourist facilities and programs;
3. Providing tourism marketing assistance;
4. Supplying tourism expertise to member First Nations political and economic development organizations; and
5. Working with other organizations to find opportunities that may benefit their members.

The recommendations within the report that might fall within the mandate of NONTA are:

- Recommendation Twelve/Product/Aboriginal Tourism:  
In light of the consumer demand for authentic products and in particular Aboriginal products, the recommendations contained in the Aboriginal Tourism Section of this report should be pursued.
- Recommendation Thirty-Five/Aboriginal Tourism/Inventory:  
A collaborative effort should be made to more fully research and catalogue the region's Aboriginal tourism product and develop strategies to develop and promote what is offered.
- Recommendation Thirty-Six/Aboriginal Tourism/Training:  
Small business management training should be extended to more Aboriginal tourism businesses to aid in the organization of their businesses and to help them to plan for future growth. This may best be accomplished working with Economic Development Officers in Aboriginal communities.
- Recommendation Thirty-Nine/Aboriginal Tourism/Technology:  
Aboriginal tourism business owners need to look at investing in utilizing the Internet to effectively market and sell their products/experiences.
- Recommendation Forty/Aboriginal Tourism/Marketing:  
More aggressive marketing efforts should be made within the Aboriginal business community (or partnerships of businesses to lower cost) to showcase their unique cultural experiences and handmade items and implement a way of tracking return on investment.
- Recommendation Nine/Product/Waterfront:  
Consistent with promoting the City of Thunder Bay's historic and modern connection to Lake Superior and with respect to tourism values of well developed urban waterfronts, the sustainable development of Thunder Bay's waterfront with a mixed use plan based on solid public/private partnerships should continue to provide new recreational and economic benefits to the community. It should also serve to expand the range of activities necessary to retain visitors within the community for a longer period and therefore increase the economic impact of the tourism sector for the community and region. As such, it should be endorsed by the local and regional tourism industry.

### **North of Superior Snowmobile Association (NOSSA)**

NOSSA's member clubs are Greenstone, Hornepayne, Manitouwadge, Marathon, Nipigon, Terrace Bay, Thunder Bay and White River. This year, NOSSA with its partners the Township of Nipigon and Thunder Bay Adventure Trails, is working on re-opening the trail from Thunder Bay to Nipigon which has been closed for the last five years. The partnership is also working on the existing trails extending from Nipigon to Beardmore. The following recommendation is within NOSSA's mandate:

- Recommendation One/Product/Snowmobile Trail Development:  
That NOSSA, with appropriate partners, seek funding to complete all missing trail linkages within the North of Superior region.

### **North of Superior Tourism Association**

North of Superior Tourism Association (NOSTA) is the regional DMO. Its new 2009-2011 Plan specifies that, at least until 2011, NOSTA's priorities will be marketing and membership.

The recommendations in this Report that could fall within the mandate of NOSTA are:

- Recommendation Four/Product/Packaging and Bundling (First Nations):  
That packaging and bundling of products/experiences be further developed between tourist operators, regional communities and First Nations to enhance the region's critical mass of things to see and do and therefore strengthening partnerships and alliances.

- Recommendation Five/Product/Packaging and Marketing:  
Work with OTMPC Northern Portal project to package and market cultural products and experiences that are intrinsically linked to the region.
- Recommendation Seven/Product/Best Practices:  
Feature success stories and best practices on the regional DMO (NOSTA) and other web sites.
- Recommendation Eleven/Product/Data Storage:  
The PRTD Process data should be stored in a format that is easy to update and updated regularly, using a system such as Inmagic DBText, WebPublisher PRO.
- Recommendation Thirteen/Product/Positioning:  
All of the region's competitors promote virtually the same products as the North of Superior region. It is recommended that those who promote the region clearly differentiate the North of Superior products, including communicating what there is to see and do beyond hunting and fishing.
- Recommendation Fourteen/Product/Positioning:  
The positioning statements contained in the 2009-2011 NOSTA Strategic Business and Marketing Plan are useful in that they communicate some of the aspects that are unique in the NOSTA region. They should be used as a guideline to ensure that the region is viewed as being distinctive by potential visitors.
- Recommendation Twenty-One/Product/Survey Template:  
That a template for a visitor satisfaction survey be provided as part of the North of Superior Tourism Association's membership package.
- Recommendation Twenty-Two/Performance/CTC:  
Strengthen communications with the Canadian Tourism Commission to ensure that Northern Ontario has a presence on their web site. This may be achieved through the provision of information on one or more of their "focus" areas such as Aboriginal and sports tourism.
- Recommendation Twenty-Seven/Futurity/Visitor Centres:  
Implement a campaign seeking older adult volunteers for visitor centres in order to help keep centres open longer and later. In addition, it is anticipated that many older adults would have a great deal of knowledge of the region.
- Recommendation Twenty-Eight/Visitor Recommendation/Signage:  
That communities be made aware of the importance of having compelling entranceway and other signage to encourage visitors who are passing through to stop and visit and that guidance and financial assistance be provided to these communities to develop a signage program. An example of an area that has developed templates for appealing signage to encourage tourists to visit is Greenstone's proposed "Spirit of the North" touring signage.
- Recommendation Thirty-Two/Visitor Recommendation/Packaged and Bundled Products:  
That the North of Superior region provide more packaged/bundled products for visitors.
- Recommendation Nine/Product/Waterfront:  
Consistent with promoting the City of Thunder Bay's historic and modern connection to Lake Superior and with respect to tourism values of well developed urban waterfronts, the sustainable development of Thunder Bay's waterfront with a mixed use plan based on solid public/private partnerships should continue to provide new recreational and economic benefits to the community. It should also serve to expand the range of activities necessary to retain visitors within the community for a longer period and therefore increase the economic impact of the tourism sector for the community and region. As such, it should be endorsed by the local and regional tourism industry.

## Northwestern Ontario Regional Tourism Council

The Northwestern Ontario Regional Tourism Council (NWORTC) is mandated to "develop and foster a Northwestern Ontario tourism strategy which addresses key issues, including planning, policy and product development". The Council is not funded at this time. The recommendations in this Report that might fall within the mandate of the NWORTC are:

- Recommendation Three/Product/Funding:  
Access to low cost loans seems to be an issue for tourism businesses in Northern Ontario. Further investigation should be undertaken to see why this is the case, what the roadblocks are and identify solutions that are attainable.
- Recommendation Six/Product/Trail Maintenance and Policing:  
That discussions be pursued with different levels of government to assume responsibility for the development, maintenance and policing of the region's snowmobile trails.
- Recommendation Fifteen/Product/Internet Pilot Project:  
Endorse the *Preparing for Change* recommendation for a three year Internet pilot project.
- Recommendation Nineteen/Product/Five Year Plan:  
The opportunities identified in the Product Opportunities chart, along with the recommendations contained in this report and within the appendices have been summarized with proposed timelines, forming the basis of a Five-Year Strategic Tourism Development Plan for the region. This plan should be implemented in a timely manner to help to support the growth of tourism in the North of Superior Region.\*
- Recommendation Twenty-Five/Futurity/Awareness:  
Implement a region-wide campaign about the importance of tourism. This may include community-based tourism trade shows.
- Recommendation Twenty-Six/Futurity/Corridor Standard:  
Support the recommendation contained in the *Preparing for Change* report that "a 10-year action plan be developed and resourced to develop a corridor standard for Highway 11/17 that is attractive, caters to travellers' needs for signage, rest areas and viewing points and provides an anticipated level of highway design standard and service."
- Recommendation Thirty-Four/Visitor Recommendation/Visitor Needs:  
That the North of Superior region attempt to cater more fully to visitor needs including developing/improving rest stops, enhancing accommodations and dining and providing the latest in technological communications.
- Recommendation Forty-Five/Conclusion/Baseline Document:  
That this Premier Ranked Tourist Destination Process in the North of Superior region Final Report be used as the baseline for the development of a Regional Tourism Strategic Plan for the entire North of Superior Region to include but not limited to marketing, education, product development and research.
- Recommendation Nine/Product/Waterfront:  
Consistent with promoting the City of Thunder Bay's historic and modern connection to Lake Superior and with respect to tourism values of well developed urban waterfronts, the sustainable development of Thunder Bay's waterfront with a mixed use plan based on solid public/private partnerships should continue to provide new recreational and economic benefits to the community. It should also serve to expand the range of activities necessary to retain visitors within the community for a longer period and therefore increase the economic impact of the tourism sector for the community and region. As such, it should be endorsed by the local and regional tourism industry.

\*Note: Although the NWORTC Council is currently mandated to develop a 5-year regional tourism plan, it is neither staffed nor funded to undertake such a project at this time.

## Ontario Parks

Within the North of Superior region there are eleven operating Ontario Provincial Parks which were surveyed during the PRTD Stage One: Data Collection. Ontario Parks staff worked with the PRTD Team to analyze the information collected. This summary can be found in Appendix G. The recommendations stemming from this Parks report are as follows:

- Recommendation Forty-One/Ontario Parks/Marketing:

It is recommended that Ontario Parks take into consideration the data derived from the PRTD Process during the development of future marketing strategies.

- Recommendation Forty-Two/Ontario Parks/Product Opportunities:

It is recommended that Ontario Parks takes into consideration the product opportunities identified during the PRTD Process during the review of existing and future park operations.

**The Strategic Tourism Development and Marketing Partnership for Northern Ontario which includes: FedNor, the Ontario Ministry of Tourism through the Ontario Tourism Marketing Partnership Corporation (OTMPC), and the Ontario Ministry of Northern Development and Mines through the Northern Ontario Heritage Fund Corporation (NOHFC).**

The Partnership invites input from the Northern Ontario tourism industry to identify projects for collaboration. The focus of the Partnership is on:

- Marketing Campaigns
- Market Development
- Training and Education

While the Partnership's focus is on projects that are Pan Northern, the recommendations in this report that might fall within the mandate of the Partnership either as a case study or a project that can be undertaken across the North are:

- Recommendation Eight/Product/Touring Routes:

Develop touring routes such as Economuseum® routes (artisans and agri-food businesses), culturally and historically themed routes, etc.

- Recommendation Ten/Product/Mapping:

Asset mapping projects, such as the ones being undertaken by the City of Thunder Bay and Geraldton Community Forest, along with the data collected through this process and in the recently published motorcycle and RV touring reports, offer opportunities to identify gaps and develop strategic plans. Extending the mapping of assets further into the region should therefore be considered a priority.

- Recommendation Sixteen/Product/Training:

Through Tourism Keys or another provider, make available a program to include training on using the Internet to market as well as to facilitate online bookings and purchases.

- Recommendation Seventeen/Product/OTMPC Site:

Look for opportunities to cascade more effectively from the OTMPC site.

- Recommendation Twenty-Three/Futurity/Staff Training:

That tourism operators be encouraged to utilize their DMO's web sites to facilitate staff training.

- Recommendation Twenty-Nine/Visitor Recommendation/Accessibility:

That the North of Superior region improve accessibility for persons with disabilities.



- Recommendation Thirty/Visitor Recommendation/Culture and History:  
That the North of Superior region provide more opportunities for visitors to learn about the region's Aboriginal culture and history.
- Recommendation Thirty-One/Visitor Recommendation/RV Accommodations:  
That the North of Superior region expand its RV accommodations.
- Recommendation Thirty-Five/Aboriginal Tourism/Inventory:  
A collaborative effort should be made to more fully research and catalogue the region's Aboriginal tourism product and develop strategies to develop and promote what is offered.
- Recommendation Thirty-Nine/Aboriginal Tourism/Technology:  
Aboriginal tourism business owners need to look at investing in utilizing the Internet to effectively market and sell their products/experiences.
- Recommendation Forty/Aboriginal Tourism/Marketing:  
More aggressive marketing efforts should be made within the Aboriginal business community (or partnerships of businesses to lower cost) to showcase their unique cultural experiences and handmade items and implement a way of tracking return on investment.



## Implementation and Timelines

The below chart shows each recommendation, the proposed lead agency, potential partners and timelines for the implementation of all of the PRTD Recommendations.

Short Term – within two years

Medium Term – within four years

Long Term – four to five years

Recommendation	Proposed Lead	Potential Partner(s)	Timeline
<b>Recommendation One/Product/Snowmobile Trail Development:</b> That NOSSA, with the appropriate partners, seek funding to complete all missing trail linkages within the North of Superior region.	NOSSA	Municipalities, NWORTC	Short term
<b>Recommendation Two/Product/Non-operating parks:</b> That regional municipalities be encouraged to assume the operational responsibility for key non-operating parks in the region where practical.	Municipalities where non-operating parks exist	Ontario Parks	Medium term
<b>Recommendation Three/Product/Funding:</b> Access to low cost loans seems to be an issue for tourism businesses in Northern Ontario. Further investigation should be undertaken to see why this is the case, what the roadblocks are and identify solutions that are attainable.	NWORTC	Municipalities	Short to medium term
<b>Recommendation Four/Product/Packaging and Bundling (First Nations):</b> That packaging and bundling of products/experiences be further developed between tourist operators, regional communities and First Nations to enhance the region's critical mass of things to see and do and therefore strengthening partnerships and alliances.	NOSTA, First Nations, DMOs/EDOs	Tourism operators, regional communities	Medium term
<b>Recommendation Five/Product/Packaging and Marketing:</b> Work with OTMPC Northern Portal project to package and market cultural products and experiences that are intrinsically linked to the region.	NOSTA	DMOs, Municipalities	Short term
<b>Recommendation Six/Product/Trail Maintenance and Policing:</b> That discussions should be pursued with different levels of government to assume responsibility for the development, maintenance and policing of the region's snowmobile trails.	NWORTC	NOSSA, Municipalities, tourism operators	Short to medium term

Recommendation	Proposed Lead	Potential Partner(s)	Timeline
<p><b>Recommendation Seven/Product/Best Practices:</b> Feature success stories and best practices on the regional DMO (NOSTA) and other web sites.</p>	NOSTA, Municipalities	Tourism operators	Short term
<p><b>Recommendation Eight/Product/Touring Routes:</b> Develop touring routes such as Economuseum® routes (artisans and agri-food businesses), culturally and historically themed routes, etc.</p>	STDMP	NOSTA, Municipalities, tourism operators	Short to medium term
<p><b>Recommendation Nine/Product/ Waterfront:</b> Consistent with promoting the City of Thunder Bay's historic and modern connection to Lake Superior and with respect to tourism values of well developed urban waterfronts, the sustainable development of Thunder Bay's waterfront with a mixed use plan based on solid public/private partnerships should continue to provide new recreational and economic benefits to the community. It should also serve to expand the range of activities necessary to retain visitors within the community for a longer period and therefore increase the economic impact of the tourism sector for the community and region. As such, it should be endorsed by the local and regional tourism industry.</p>	Tourism industry stakeholders		Short term
<p><b>Recommendation Ten/Product/Mapping:</b> Asset mapping projects, such as the ones being undertaken by the City of Thunder Bay and Geraldton Community Forest, along with the data collected through this process and in the recently published motorcycle and RV touring reports, offer opportunities to identify gaps and develop strategic plans. Extending the mapping of assets further into the region should therefore be considered a priority.</p>	STDMP	Regional Municipalities	Short term
<p><b>Recommendation Eleven/Product/Data Storage:</b> The PRTD Process data should be stored in a format that is easy to update and updated regularly, using a system such as Inmagic DBText, WebPublisher PRO.</p>	NOSTA	Funding partner	
<p><b>Recommendation Twelve/Product/Aboriginal Tourism:</b> In light of the consumer demand for authentic products and in particular Aboriginal products, the recommendations contained in the Aboriginal Tourism Section of this report should be pursued.</p>	Aboriginal DMOs, EDOs	NOSTA, Municipalities	

Recommendation	Proposed Lead	Potential Partner(s)	Timeline
<p><b>Recommendation Thirteen/Product/Positioning:</b> All of the region's competitors promote virtually the same products as the North of Superior region. It is recommended that those who promote the region clearly differentiate the North of Superior products, including communicating what there is to see and do beyond hunting and fishing.</p>	NOSTA, DMOs/EDOs	Tourism Operators	Short term
<p><b>Recommendation Fourteen/Product/Positioning:</b> The positioning statements contained in the 2009-2011 NOSTA Strategic Business and Marketing Plan are useful in that they communicate some of the aspects that are unique in the NOSTA region. They should be used as a guideline to ensure that the region is viewed as being distinctive by potential visitors.</p>	NOSTA, DMOs/EDOs	Tourism Operators	Short term
<p><b>Recommendation Fifteen/Product/Internet Pilot Project:</b> <i>Endorse the Preparing for Change</i> recommendation for a three year Internet pilot project.</p>	NWORDC	Tourism Operators	Short term
<p><b>Recommendation Sixteen/Product/Training:</b> Through Tourism Keys, or another provider, make available a program to include training on using the Internet to market as well as to facilitate online bookings and purchases.</p>	STDMP		Medium term
<p><b>Recommendation Seventeen/Product/OTMPC Site:</b> Look for opportunities to cascade more effectively from the OTMPC site.</p>	STDMP	NOSTA, Municipalities, Tourism Operators	Short to medium term
<p><b>Recommendation Eighteen/Product/Internet Access:</b> Seek funding to provide access to the Internet for visitors in all of the region's tourist bureaus.</p>	CFDCs	NOSTA, Municipalities	Medium term
<p><b>Recommendation Nineteen/Product/Five Year Plan:</b> The opportunities identified in the Product Opportunities chart, along with the recommendations contained in this report and within the appendices have been summarized with proposed timelines, forming the basis of a Five-Year Strategic Tourism Development Plan for the region. This plan should be implemented in a timely manner to help to support the growth of tourism in the North of Superior region.</p>	NWORDC	Funding partner(s)	Short term

Recommendation	Proposed Lead	Potential Partner(s)	Timeline
<p><b>Recommendation Twenty/Product/Regional Cuisine:</b> Form a working group of chefs to discuss ways to develop and implement a regional cuisine product.</p>	CFDCs	Municipalities	Medium term
<p><b>Recommendation Twenty-One/Product/Survey Template:</b> That a template for a visitor satisfaction survey be provided as part of the North of Superior Tourism Association's membership package.</p>	NOSTA	Tourism Operators	Short term
<p><b>Recommendation Twenty-Two/Performance/CTC:</b> Strengthen communications with the Canadian Tourism Commission to ensure that Northern Ontario has a presence on their web site. This may be achieved through the provision of information on one or more of their "focus" areas such as Aboriginal and sports tourism.</p>	NOSTA, DMOs/EDOs	OTMPC	Medium term
<p><b>Recommendation Twenty-Three/Futurity/Staff Training:</b> That tourism operators be encouraged to utilize their DMO's web sites to facilitate staff training.</p>	STDMP	Tourism operators	Short term, on-going
<p><b>Recommendation Twenty-Four/Futurity/Infrastructure:</b> Pursue opportunities for regional community tourism development through the newly-announced Federal-Provincial Infrastructure agreement for communities under 100,000.</p>	Municipalities	Federal and Provincial Governments	Short to medium term
<p><b>Recommendation Twenty-Five/Futurity/Awareness:</b> Implement a region-wide campaign about the importance of tourism. This may include community-based tourism trade shows.</p>	NWORDC	Tourism operators, Municipalities	Short to medium term
<p><b>Recommendation Twenty-Six/Futurity/Corridor Standard:</b> Support the recommendation contained in the <i>Preparing for Change report</i> that "a 10-year action plan be developed and resourced to develop a corridor standard for Highway 11/17 that is attractive, caters to travellers' needs for signage, rest areas and viewing points and provides an anticipated level of highway design standard and service."</p>	NWORDC	Tourism operators	Short term

Recommendation	Proposed Lead	Potential Partner(s)	Timeline
<p><b>Recommendation Twenty-Seven/Futurity/Visitor Centres:</b> Implement a campaign seeking older adult volunteers for visitor centres in order to help keep centres open longer and later. In addition, it is anticipated that many older adults would have a great deal of knowledge of the region.</p>	NOSTA, DMOs/EDOs	Volunteer Thunder Bay	Short term
<p><b>Recommendation Twenty-Eight/Visitor Recommendation/Signage:</b> That communities be made aware of the importance of having compelling entranceway and other signage to encourage visitors who are passing through to stop and visit and that guidance and financial assistance be provided to these communities to develop a signage program. An example of an area that has developed templates for appealing signage to encourage tourists to visit is Greenstone's proposed "Spirit of the North" touring signage.</p>	NOSTA	Municipalities, STDMP	Short to medium term
<p><b>Recommendation Twenty-Nine/Visitor Recommendation/Accessibility:</b> That the North of Superior region improve accessibility for persons with disabilities.</p>	STDMP, DMOs/EDOs		Medium term
<p><b>Recommendation Thirty/Visitor Recommendation/Culture and History:</b> That the North of Superior region provide more opportunities for visitors to learn about the region's Aboriginal culture and history.</p>	DMOs/EDOs, STDMP	First Nations communities	
<p><b>Recommendation Thirty-One/Visitor Recommendation/RV Accommodations:</b> That the North of Superior region expand its RV accommodations.</p>	STDMP, DMOs/EDOs		Medium term
<p><b>Recommendation Thirty-Two/Visitor Recommendation/Packaged and Bundled Products:</b> That the North of Superior region provide more packaged/bundled products for visitors.</p>	NOSTA	DMOs/EDOs, Tourism operators	Short term
<p><b>Recommendation Thirty-Three/Visitor Recommendation/Hiking and Aboriginal Walks:</b> That the North of Superior region create additional (and/or increase promotion of) hiking and Aboriginal walks.</p>	DMOs/EDOs	NOSTA	Short to medium term

Recommendation	Proposed Lead	Potential Partner(s)	Timeline
<p><b>Recommendation Thirty-Four/Visitor Recommendation/Visitor Needs:</b> That the North of Superior region attempt to cater more fully to visitor needs including developing/improving rest stops, enhancing accommodations and dining and providing the latest in technological communications.</p>	<p>NWORTC (see Recommendation Twenty-Six – Corridor Standard)</p>		<p>Long term</p>
<p><b>Recommendation Thirty-Five/Aboriginal Tourism/Inventory:</b> A collaborative effort should be made to more fully research and catalogue the region's Aboriginal tourism product and develop strategies to develop and promote what is offered.</p>	<p>STDMP, DMOs/EDOs</p>	<p>Municipalities, First Nations communities</p>	<p>Short term</p>
<p><b>Recommendation Thirty-Six/Aboriginal Tourism/Training:</b> Small business management training should be extended to more Aboriginal tourism businesses to aid in the organization of their businesses and to help them to plan for future growth. This may best be accomplished working with Economic Development Officers in Aboriginal communities.</p>	<p>DMOs/EDOs</p>	<p>CFDCs</p>	<p>Medium term</p>
<p><b>Recommendation Thirty-Seven/Aboriginal Tourism/Partnerships:</b> Partnership efforts should be created amongst all business owners, including Aboriginal business owners, for the purpose of sharing resources and expertise as well as diminishing the costs associated with advertising and marketing.</p>	<p>DMOs/EDOs</p>	<p>Tourism operators</p>	<p>Short to medium term</p>
<p><b>Recommendation Thirty-Eight/Aboriginal Tourism/Infrastructure:</b> First Nations communities should identify infrastructure priorities that may be required to develop longer term tourist products.</p>	<p>DMOs/EDOs</p>		<p>Medium term</p>
<p><b>Recommendation Thirty-Nine/Aboriginal Tourism/Technology:</b> Aboriginal tourism business owners need to look at investing in utilizing the Internet to effectively market and sell their products/experiences.</p>	<p>STDMP</p>	<p>DMOs/EDOs</p>	<p>Medium term</p>

Recommendation	Proposed Lead	Potential Partner(s)	Timeline
<p><b>Recommendation Forty/Aboriginal Tourism/Marketing:</b> More aggressive marketing efforts should be made within the Aboriginal business community (or partnerships of businesses to lower cost) to showcase their unique cultural experiences and handmade items and implement a way of tracking return on investment.</p>	STDMP	DMOs/EDOs	Medium term
<p><b>Recommendation Forty-One/Ontario Parks/Marketing:</b> It is recommended that Ontario Parks takes into consideration the data derived from the PRTD Process during the development of future marketing strategies.</p>	Ontario Parks		On-going
<p><b>Recommendation Forty-Two/Ontario Parks/Product Opportunities:</b> It is recommended that Ontario Parks takes into consideration the product opportunities identified during the PRTD Process during the review of existing and future park operations.</p>	Ontario Parks		On-going
<p><b>Recommendation Forty-Three/Sports Tourism/Technology:</b> Representatives of sporting events and facilities should investigate opportunities to enhance the use of technology to better promote events, provide online registration, and to publish scores and event results.</p>	DMOs/EDOs, Sporting Event Planners	Funding partner(s)	Short term
<p><b>Recommendation Forty-Four/Sports Tourism/Importance:</b> That the City of Thunder Bay and other communities within the North of Superior region continue to look at sports tourism as a way of attracting a higher number of visitors and focus on developing the facilities, capacity and ability to host such events.</p>	DMOs/EDOs		Short to medium term
<p><b>Recommendation Forty-Five/Conclusion/Baseline Document:</b> That this Premier Ranked Tourist Destination Process in the North of Superior region Final Report be used as the baseline for the development of a Regional Tourism Strategic Plan for the entire North of Superior region to include but not limited to marketing, education, product development and research.</p>	NWORTC	Funding partner(s), NOSTA, DMOs/EDOs, tourism operators	Short to medium term



## APPENDICES

---



## Appendix A: Regional Tourism Profiles – Emerging Attractions/Upcoming Developments

### **Greenstone – The Spirit of the North (Population: 5,600<sup>39</sup>)**

The Municipality of Greenstone is an amalgamation of Towns of Geraldton and Longlac, the Townships of Beardmore and Nakina and the settlements of Caramat, Jellicoe and MacDiarmid.

Greenstone is marketed as a natural playground for visitors, with numerous lakes and rivers. In the summer, swimming, fishing, canoeing, rock climbing and hiking are popular tourism activities while in the winter, ice climbing, snowmobiling, skiing and skating either draw visitors to the area or provide reasons to cause them to stay longer.

Plans are now underway to expand Greenstone's range and quality of tourism products as follows:

- Greenstone has a service agreement with Geraldton Community Forest Inc (GCFI) to operate MacLeod Park and maintain the Community Portal. In addition, GIS coordination is provided by GEOMA a subsidiary of GCFI that provides interactive mapping
- Integration is planned between recreation and tourism and packaging as Greenstone Outdoors
- Greenstone Community Adjustment Committee in the conclusion phase and local committees are moving forward with the tourism related action items originating from this initiative
- Partnership/agreements with North of Superior Tourism Association are in place and will aid in marketing and advertising efforts
- Continued long term support for the mining exploration sector as a hospitality provider is being offered
- Additional public and private partnerships have been created to further develop tourism in the Greenstone area
- Development of adventure trails, including barrier-free accessibility is ongoing. Green Energy Plans and information for tourist operators pertaining to product offerings are being developed.
- Completed breakwater installation for High Hill Harbour; allowing for investment recruitment and marketing of vacation properties and outdoor adventurers
- Completion of three year destination marketing study will assist with providing a framework for marketing Greenstone as a destination
- Formalization and development of the Bed and Breakfast marketplace
- Hospitality Sector is a growing element especially for VFR and for the resource development sector

For more information:

Harry Kelly  
Director of Economic Development  
Municipality of Greenstone  
Email: [hjk\\_greenstone@yahoo.ca](mailto:hjk_greenstone@yahoo.ca)

or

Dina Quenneville  
Executive Director  
Greenstone Economic Development  
Email: [dquenneville@astrocom-on.com](mailto:dquenneville@astrocom-on.com)

---

<sup>39</sup> 2006 Census

## **The Land of the Nipigon**

This touring area includes Dorion, Hurkett, Red Rock, Nipigon and the Red Rock Indian Band.

Nipigon is located where Highways 11 and 17 meet and where the Canadian National and Canadian Pacific Railways join, with its Nipigon River Bridge the only connection between Eastern and Western Canada making it the Crossroads of Canada.

Well known for its excellent sports fishing, Nipigon offers a full-service marina to boaters, along with a scenic hiking trail.

Now undergoing revitalization, Nipigon's downtown features three giant murals that depict the town's history and heritage, offering glimpses of the railway, logging and retail industries.

A major tourism project, long in the making, is now approaching the construction stage, The Nipigon Revitalization and Paddle to the Sea Park Project. Nipigon's Paddle to the Sea Theme Park will be located in the heart of the downtown area. A series of interactive play stations will follow the journey of a wooden toy canoe as it travels from Lake Nipigon and through the Great Lakes to reach the ocean.

The town's newly renovated museum boasts a replica of the world record speckle trout, caught in the Nipigon River in 1915.

In addition, plans are now underway to stage the "Wings Over Top of Superior" bird festival the long weekend in May, 2009 in the Nipigon/Dorion/Lake Helen/Hurkett area.

A number of birding spots and area attractions will be available to the participants including:

- Hurkett Dock
- Hurkett Cove
- Eagle Canyon Trails, suspension bridges and zip line
- Ouimet Canyon
- Dorion Fish Hatchery
- Spring Creek
- Phil McGuire's Farm
- Lake Helen
- Five-Mile Park
- Fire Hill [Great Blue Heron Nests]
- Kama Cliffs [Peregrine Falcons]
- 81 Road
- Nipigon Marina
- Saw Mill Point Loop
- Tower Road 4 x 4 Safari
- Cameron Falls Road
- Alexander Falls Lookout
- Pull-A-Log Park
- Red Rock End of Trail
- Walk along the CN Tracks
- Museum Tours in Nipigon and Dorion

Participants will also be offered special meals including a fish fry, a pancake breakfast and unique boxed lunches.

In the evenings guest speakers will provide guests with a variety of presentations and vendors will be able to sell their goods.

The snowmobile trail extending from Thunder Bay to Nipigon has unfortunately not been open for the last five years. Under new trail development, beginning this summer the North of Superior Snowmobile Association (NOSSA), in partnership with the Township of Nipigon and Thunder Bay Adventure Trails will be able to reopen this trail and work on the existing trails extending from Nipigon to Beardmore.

NOSSA has hired seven people who will partake in this new and exciting process. Their duties will range from creating a monthly newsletter which will update permit holders, the general public and NOSSA executive about featured stories happening in each community. Many others will go into the field and work first hand on the new trails. One of the goals for NOSSA is to strengthen the relationship between municipalities and tourism oriented partners within the boundaries of District 16 which encompasses White River to the East, Nakina and Hornepayne to the North and Kakabeka to the West.

In Red Rock, a new downtown park / green space has just been completed.

Red Rock also has a waterfront project in the works. This will include docking facilities for bigger boats and a new Waterfront Centre with interpretive areas, shopping, and amenities. This initiative is still in the early stages.

For more information:

Sarah Lewis  
Community Development Officer  
Township of Nipigon  
Email: sarahlewis@nipigon.net

Stephen Behun  
Chair, Dorion Economic Development  
Township of Dorion  
Email: dedc@doriontownship.ca

Leslee Fredricks  
Community Development Officer  
Township of Red Rock  
Email: cdo@redrocktownship.com

### **City of Thunder Bay (Population 109,140<sup>40</sup>)**

Tourism Thunder Bay has embarked on a new marketing strategy that utilizes a strengthened "Superior by Nature" branding and aims to strengthen the City's position as one of Canada's great outdoor cities. The City has been leading its marketing with a focus on the community icon of the Sleeping Giant as one of Canada's great natural wonders and its connection to both Lake Superior and wilderness at the doorstep of exceptional urban experiences. The City's tourism product development and marketing efforts are focusing on the segments of leisure, Corporate, Sport Tourism and group touring utilizing the Sleeping Giant as the marketing icon. By focusing on the affluent outdoor experience seeker across North America and into key European and Asian markets, the city is able to focus on targeted leisure markets, raise the profile of the city and drive consumers to the [www.visitthunderbay.com](http://www.visitthunderbay.com) site, where the urban experiences and the city's story is told in much greater depth. In reaching consumers in each of these segments, the Tourism Division is also leading most Canadian municipalities in the implementation of Web 2.0 technology and channels to effectively market the city's attractions, accommodations and events.

For more information:

Paul Anthony Pepe  
Manager - Tourism  
Community Services Department  
City of Thunder Bay  
Email: ppepe@thunderbay.ca

---

<sup>40</sup> 2006 Census

## **Top of Superior Region**

This is the touring region east of The Land of the Nipigon, encompassing Gravel River, Rosspport, Pays Plat, Schreiber, Terrace Bay, Jackfish, Marathon, Heron Bay, Pic Mobert and Manitouwadge.

In Marathon, plans are underway for the Penn Lake Park Revitalization – a \$1 M+ investment into this community's RV park. Revitalization will include the complete restoration of the RV and tenting campground with water, sewer and Internet hook-ups. Construction of a new comfort station, children's playground and a beach volleyball court are also in the plans.

A \$200,000 initiative is also underway in Marathon to develop a comprehensive and coordinated sign plan including highway signage, directional signage, attraction and event signage and community signage.

In partnership with Parks Canada, restoration and updating of the Marathon Visitor Information Centre including new murals, new displays and outdoor landscaping is also planned.

In Manitouwadge, the 3rd and final Home Give Away project has just concluded. Entry in a contest to win a home in this community was free to anyone who visited Manitouwadge between June 1 and August 9, 2008. The Manitouwadge website is also being updated and a new website will be launched in addition to their existing one, [www.playintheextreme.com](http://www.playintheextreme.com). Restrooms have been added to Hwy 17 and the intersection of Hwy 614 and snow making equipment is available at the ski hill to extend the ski season.

For more information:

Daryl Skworchinski  
Economic Development Manager  
Township of Marathon  
Email: [edo@marathon.ca](mailto:edo@marathon.ca)

Dave Raymond  
Economic Development Officer  
Township of Manitouwadge  
Email: [edo@twp.manitouwadge.on.ca](mailto:edo@twp.manitouwadge.on.ca)

## **Thunder Bay North, South and West**

The Kakabeka Falls Annual Streetfair is scheduled to be held August 15 to 17, 2008. The village is transformed into a hub of activity with skateboard parks, displays, amusement rides and horse and buggy tours.

The following weekend, the Oliver Agricultural Society hosts the 117th Murillo Fair on the fairgrounds in the village of Murillo. Visitors to the Fair can enjoy a variety of activities in a rural setting from a craft fair to chariot horse races.

The Paipoonge Museum was founded to preserve the memory and to depict the lifestyle of the pioneers who lived in homesteads in the Municipality of Paipoonge in 1887. Interpretive tours and workshops such as pioneer crafts, rug making, crocheting and tatting are available.

The Founders' Museum and Pioneer Village is also located within this region on Hwy 61. This popular attraction includes a General Store, a carpenter, cobbler and even a blacksmith shop.

Local farmers sell a variety of "fresh off the fields" produce from strawberries to pumpkins and the Thunder Oak Cheese Farm produces and sells award-winning Gouda cheese.

In September, the 76th Slate River Plowing Match will be held on Hwy 130. This is an annual event where area farmers attempt to earn the privilege of ploughing fields at the Canadian Championship level. Local politicians and celebrities also take their turns at the wheel. The event is capped off with a home cooked meal by the Stanley Women's Institute at the Rossllyn Community Centre. Area Women's Institute groups host a strawberry social each July.

For more information:

Lucy Kloosterhuis, Mayor  
Municipality of Oliver Paipoonge  
Email: [mayor.lucy@xplornet.com](mailto:mayor.lucy@xplornet.com)

## **Terrace Bay and Schreiber**

As the Eastern Gateway to the new Lake Superior National Marine Conservation Area, Terrace Bay has extensive plans for tourism enhancement, including an impressive downtown revitalization project, featuring façade improvements to Simcoe Plaza, the development of a lookout beacon from which one can view the Slate Islands 13 km across the Lake as well as streetscape and landscape enhancements. The project will be complemented by new entrance signage building on the relationship of the town with Lake Superior, the Slate Islands caribou population and its proud forestry history. The development of a full-service marina and associated facilities and services is in the planning stages.

In 2007, the town successfully launched its new web site ([www.terracebay.ca](http://www.terracebay.ca)) in partnership with neighboring Schreiber and regional video and photographic images are being added to the site on an ongoing basis. The site's popular "Community Events" section received over 110,000 hits in the first eight months and tourists have easy access to maps and directions. In addition, Terrace Bay's literature promoting dining, accommodations and attractions has recently been upgraded and, over the next year, all other tourism marketing materials will be updated. These materials are marketed through the website and featured on display at the tourism information centre, which is situated in town on Highway 17.

The Casque Isles Hiking Trail, which is 52 km in length and skirts the shoreline of Lake Superior through Terrace Bay, Schreiber and Rosport, has also undergone significant improvements. The hiking club has invested considerable time into maintaining the trail and it now includes enhanced highway signage, trailhead signs and markers along the trail.

Plans are also underway to develop satellite imagery of the town and surrounding area primarily to attract new investment. The imagery also has implications for tourism through the use in popular applications like Google Earth.

The 2007/2008 winter delivered a heavy snowfall that coupled, with refocused volunteer groups, reinvigorated the snowmobiling market and the local ski hill.

As a popular location for fishing, hunting, kayaking, golfing, hiking, and snowmobiling, Terrace Bay is definitely building on its tourism brand of a '4 Season Destination'.

Schreiber also has ambitious tourism projects in the works. A recently-completed branding project has resulted in a new logo slogan ("Engineering Our Small Town Dream") and logo and new tourism marketing materials, as well as highway banners and interpretive panels. The town's key attraction, the railway museum, has also been upgraded and an increased number of secondary attraction signage is now in place.

For more information:

Dean Main  
Economic Development Officer  
Township of Terrace Bay  
Email: [cds@terrace-bay.com](mailto:cds@terrace-bay.com)

Anthony Friedrich  
Community Development Coordinator  
Township of Schreiber  
Email: [cdo@schreiber.ca](mailto:cdo@schreiber.ca)

## Appendix B: Traveller Profile - Information Collected from 484 Regional Visitor Surveys

### Background

The mandate of the Premier Ranked Tourist Destination Process is to identify the gaps and opportunities in the North of Superior region's tourism market and assess what potential can be built on for its future growth. In order to better understand the region's visitors, the PRTD team developed, circulated, collected and analyzed visitor surveys. This instrument helped to identify the gaps and opportunities in the market place from the point of view of the tourist. The survey itself is comprised of 12 questions that were designed to provide a snapshot of tourists in the North of Superior region. The survey was available to visitors at key locations throughout the region during the course of two separate two week periods – one overlapping Canada Day in June/July and the other overlapping the August long weekend (Summer 2007).

The surveys were available throughout the Region in a variety of locations from motels and hotels to resorts, specialty shops and parks. Some were known to be points of high traffic and others were more remote. This was done to reach a true cross section of the region's summer visitors. The research team was also able to conduct face to face interviews both at the Terry Fox Visitor Centre and the Pagoda Tourist Information Centre (both in Thunder Bay).

Thanks in large part to those tourism stakeholders who made the surveys available to visitors and encouraged their participation in the process, 484 were collected in total by the PRTD research team in the Summer of 2007. The information was then compiled into an online database where it was analyzed. The purpose of this report is to provide details on the data collected.

### Findings

#### Survey Question #1

*How many people, including yourself, are you travelling with? Please specify the number of travellers in each age group.*

Of all respondents, 58% were between the ages of 36 and 59 years old. The Baby Boomers dominate tourist travel in many markets throughout Canada because "they tend to be empty nesters, and are more likely to have the financial means to travel. They also have the time to travel, are healthy, and are looking to experience Canada and the world." (Canada's Tourism Industry: Industrial Outlook, Spring 2008, The Canadian Tourism Commission, pg 2) This is expected to continue well into the next decade as the Baby Boomer travel trend is expected to peak "sometime in the mid-2020s" (Canada's Tourism Industry: Industrial Outlook, Spring 2008, The Canadian Tourism Commission, pg 2). However, Canada is anticipating the strongest growth in this regard which is responsible for increased travel, both domestically and internationally.



*Pebble Beach near Marathon*

*"Limited information on boat/kayak spots and shuttle services for boating."  
-Visitor*

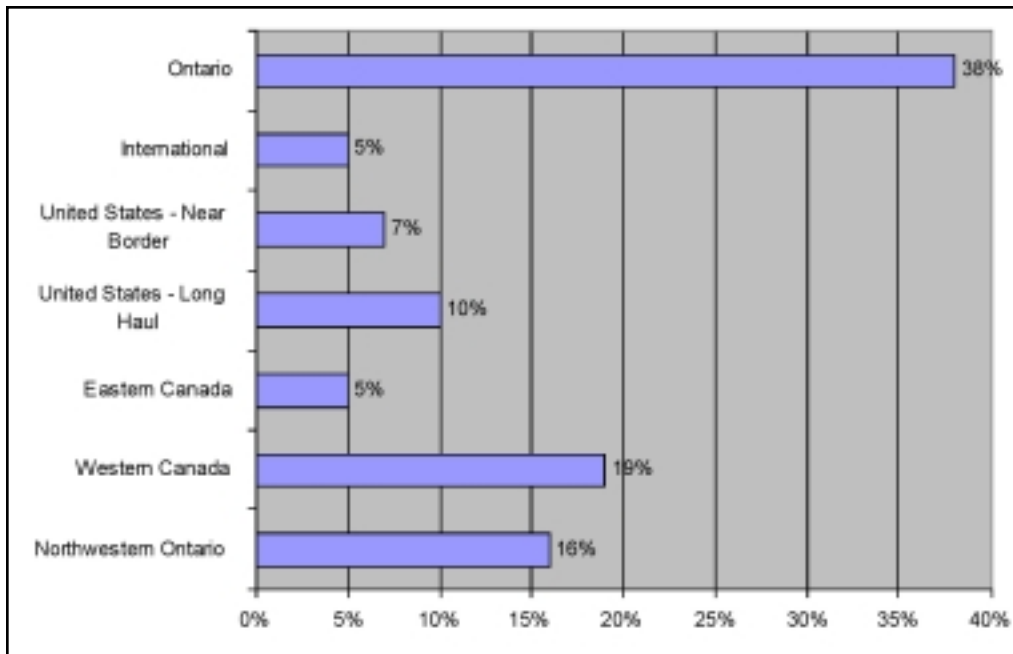


*Silver Islet Store*

*"Need better signage for campgrounds."  
-Visitor*

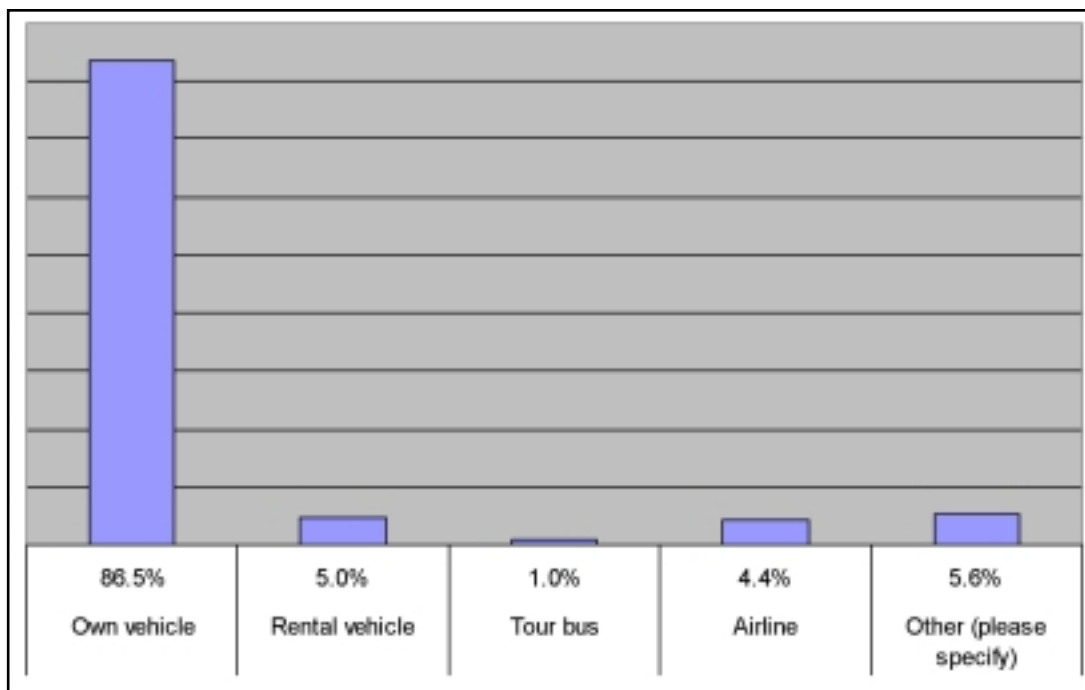
### Survey Question #2

Where are you from?



### Survey Question #3

How did you travel here?

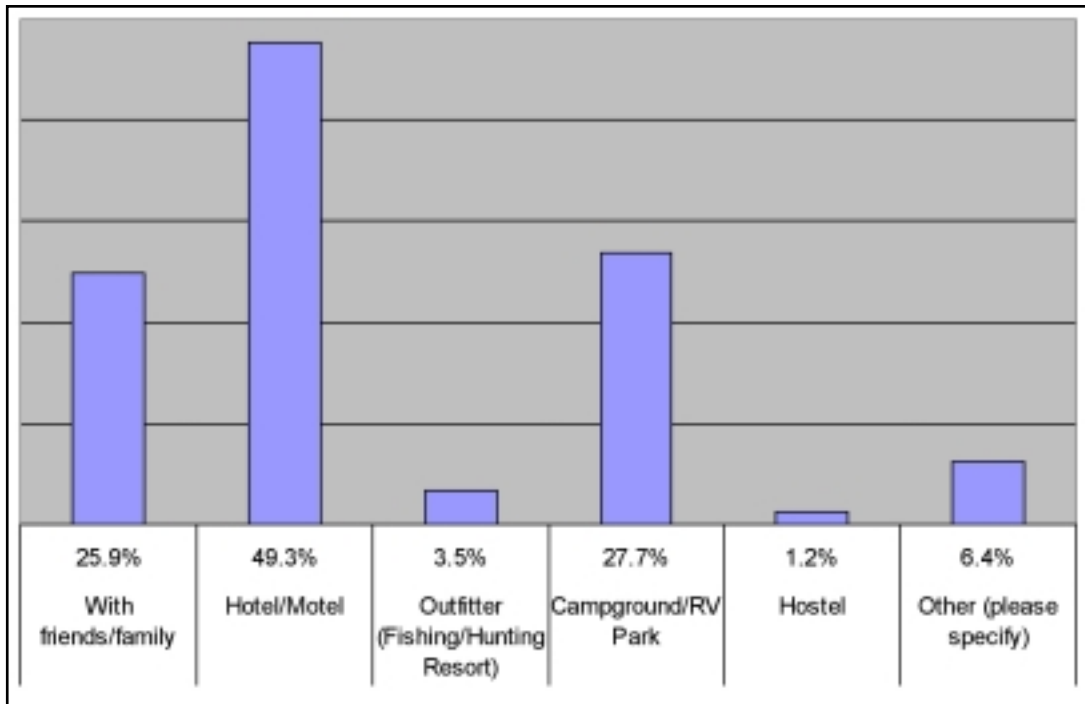
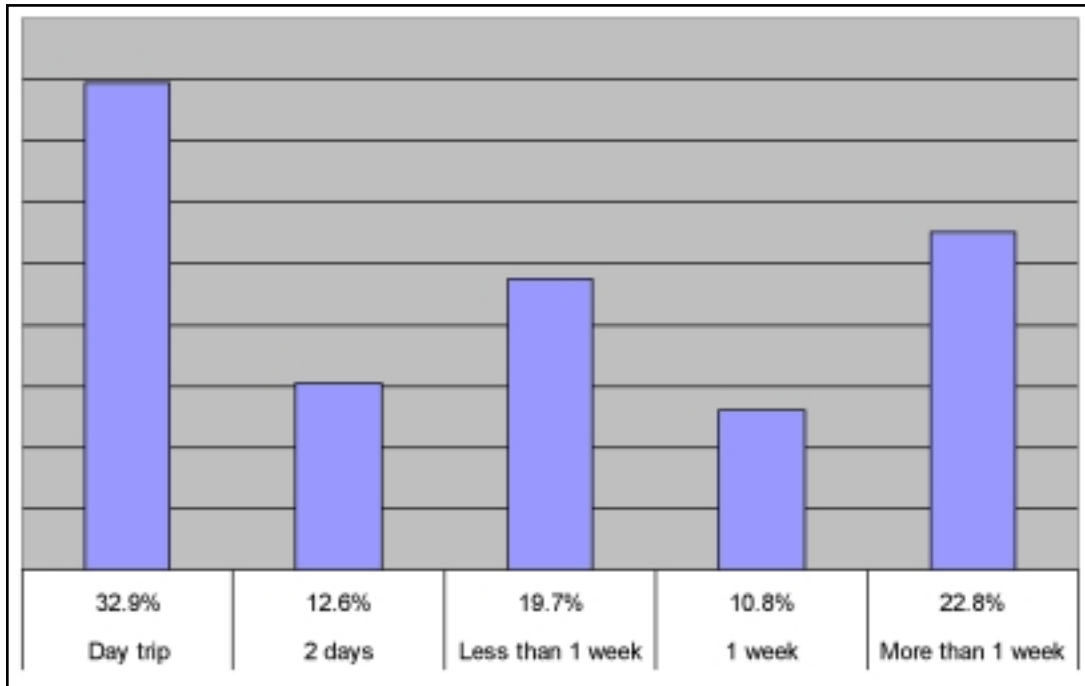


"Ontario residents are the single most important nature-based market for Northern Ontario and are expected to remain dominant in the years to come." (Northern Landscapes-Opportunities for Nature Based Tourism in Northern Ontario, Prepared by Research Resolutions & Consulting Ltd., for Federal Economic Development Initiative for Northern Ontario, 2004, pg 5) Thunder Bay is geographically positioned between two dominant urban hubs, Winnipeg in the West and Toronto in the East resulting in "own vehicle" travel as the dominant mode of transportation.



#### Survey Question #4

What are the particulars (length, accommodations) of your stay?



The majority (32.9%) are day trippers, followed by those who are staying more than a week (22.8%). Preferred accommodations are hotels/motels, followed by staying with friends or family. It has been forecast by the Canadian Tourism Commission that "accommodation industry costs are expected to rise....as tight labor markets continue to fuel strong increases in wages." (Canada's Tourism Industry: Industrial Outlook, pg 6, 7)

### Survey Question #5

*What attracted you to the region?*

Of the responses provided by visitors to the region, the three most popular in order were:

1. To experience outdoor activities, clean environment, natural beauty and scenery
2. Passing through enroute to another destination

---

*Recommendation Twenty-Eight/Visitor Recommendation/Signage:*

*That communities be made aware of the importance of having compelling entranceway and other signage to encourage visitors who are passing through to stop and visit and that guidance and financial assistance be provided to these communities to develop a signage program. An example of an area that has developed templates for appealing signage to encourage tourists to visit is Greenstone's proposed "Spirit of the North" touring signage.*

---

3. Visiting family and friends

The fact that the most popular reason for travel to Northwestern Ontario was the lure of our natural environment and exciting outdoor experiences should come as no surprise. However, the region's traditional nature based tourism products will need to be softened somewhat to appeal to the aging market. "Over the next two decades, a blend of naturalist activities and Aboriginal cultural experiences will likely have more growth potential in Northern Ontario than the traditional mix of fishing, hunting, hiking and canoeing."

(Northern Landscapes-Opportunities for Nature Based Tourism in Northern Ontario, Prepared by Research Resolutions & Consulting Ltd., for Federal Economic Development Initiative for Northern Ontario, 2004, pg 23)

### Survey Question #6

*Please rate which of the following best describes your experience within our region.*

- |                                     |       |
|-------------------------------------|-------|
| ✓ Relaxation                        | 64.1% |
| ✓ Interpretation                    | 0.9%  |
| ✓ Skills Development                | 1.4%  |
| ✓ Cultural/Historical Understanding | 8.9%  |
| ✓ Entertainment                     | 2.6%  |
| ✓ Education                         | 2.1%  |
| ✓ Adventure                         | 20%   |

These two dominant motivations for travel within the region, relaxation and adventure, can be directly linked to the relatively slow-paced environment and outdoor adventure activities that have already been identified as the leading draw.

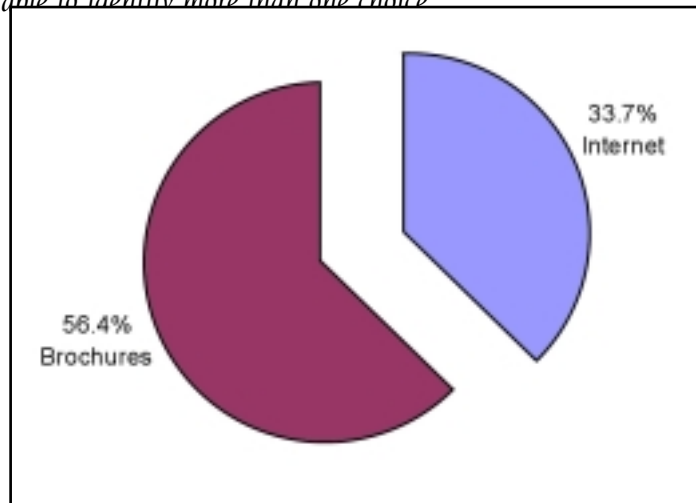
*"Far from home, no cell phone coverage or signal low."  
-Visitor*

*"Re-establish train route."  
-Visitor*

**Survey Question #7**

What promotional media have you seen for the North of Lake Superior area?

Note that respondents were able to identify more than one choice



Brochures	56.4%
Highway Signage	46.9%
Word of Mouth	45.3%
Maps	43.2%
Internet	33.7%
Billboards	29.3%
Newspapers	29.1%
Magazines	26.8%
Television	13.4%
Radio	10.6%
Other	4.8%
Trade Shows	3.2%

(Other includes: CAA Tour Book, Ontario Information Centres, Tourist Offices, Terry Fox Information Centre, Provincial Parks Guide, Great Lakes Cruising Club Book)

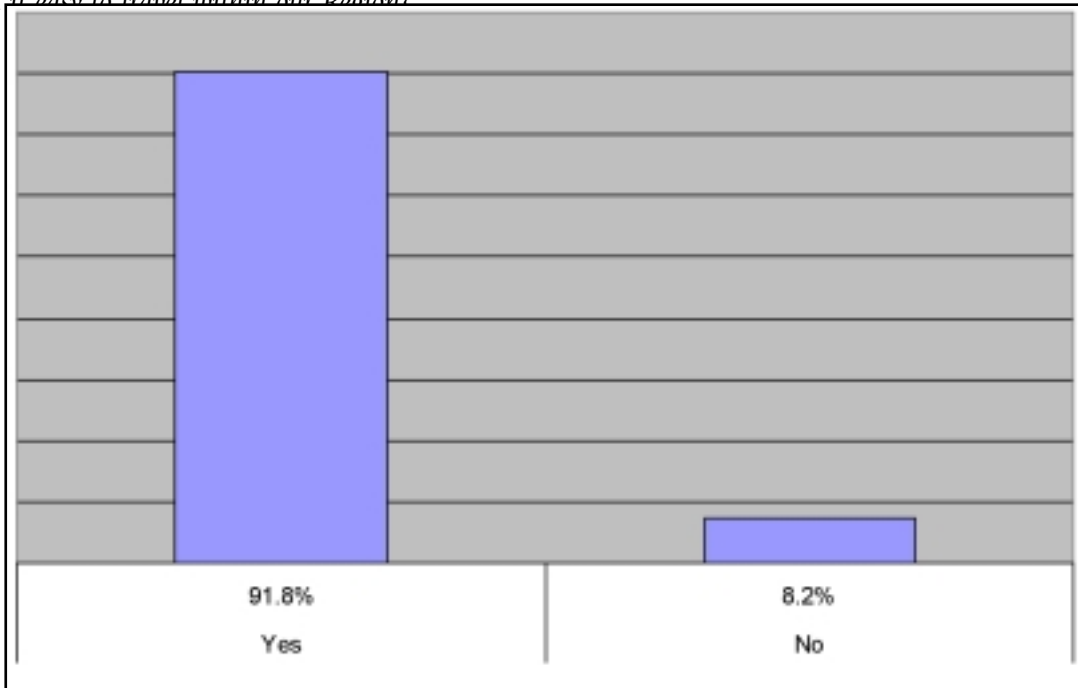
"The Internet and its sharing/referral features now represent the best opportunity for northern Ontario to promote tourism business." (The Strategic Tourism Development and Marketing Partnership for Northern Ontario, Five-Year Marketing Strategy 2008-2012 DRAFT, slide 21) While the more traditional form of promotion (brochures) appears to still be effective when it comes to drawing tourists to Northwestern Ontario as 56.4% of visitors identified brochures as a medium they had been exposed to. On the other hand only 33.7% responded that they had learned about the region through the Internet. Several reports have pointed to the Internet as an under-utilized tool in promoting Northern Ontario and the North of Superior region.

*"More eco-tourism  
(wind and solar power)."*  
-Visitor

*"Too many fish limitations."*  
-Visitor

### Survey Question #8

*Do you find it easy to travel within our Region?*



Negative comments with regard to the above question include:

- ✓ There is a lot of construction
- ✓ Speed limit was too low by 10 km/hr
- ✓ The roads are curvy and not very easy for an RV
- ✓ Need more signs for the attractions

### Survey Question #9

*In your opinion, what are the region's tourism strengths and weaknesses?*

#### Strengths

- ✓ Scenery and natural beauty
- ✓ Friendly people
- ✓ Outdoor activities
- ✓ Unique attractions that you can't find anywhere else
- ✓ A lot of gorgeous forested land to hike through
- ✓ Brilliant scenic vistas!
- ✓ Outstanding beauty

- ✓ Awesome beauty, breathtaking

#### Weaknesses

- ✓ Need more signage
- ✓ Recycle bins needed
- ✓ Isolated area – region needs more big events/attractions to make the trip worthwhile
- ✓ Need more rest stops when travelling the region
- ✓ Tourist Centres – need more and should be open longer
- ✓ More full hook ups needed for RV accommodations
- ✓ Not enough rest stops and picnic areas close to the road
- ✓ Far from home, no cell phone coverage or signal low
- ✓ Long span of highways with few amenities
- ✓ Businesses are closed too much on long weekends
- ✓ Need server training

#### Additional Comments from Visitor Surveys

- ✓ Re-establish train route
- ✓ There is an opportunity to learn about area's Aboriginal history and culture
- ✓ Develop a cross-region tour which includes kayaking, night at a B & B, dinner, transportation
- ✓ Earlier opening of attractions
- ✓ More lakeside campsites
- ✓ Consider diabetic-friendly foods to cater to wider Baby Boom population
- ✓ Develop a map of great hiking and 4 x 4 trails in area
- ✓ Promote lighthouses
- ✓ Although passing through, would be interested in 1/2 day long hikes and Native walks

#### **Survey Question #10**

*Please identify the gaps and opportunities for tourism within our Region. Please share your thoughts on what you feel is necessary for either longer visits or additional trips*

- ✓ Need to create a night life – keep stores, shops, and restaurants open later
- ✓ Re-establish the train route throughout Northwestern Ontario
- ✓ Provide a map of Northwestern Ontario with directions on how to get there
- ✓ More activities on the water – utilize your waterfront more effectively
- ✓ More highway signage – too long stretches with nothing to see
- ✓ More eco-tourism
- ✓ Higher speed limit

- ✓ More package pricing between hotels and attractions like mines

**Survey Question #11**

*Do you find our Region to be hospitable and friendly?*

98.2% of visitors that participated in PRTD surveying expressed that Northwestern Ontarians are friendly, and helpful.

*Friendly*

- ✓ Everyone is so friendly. Everyone always says "Hi!"
- ✓ Don't feel like strangers.
- ✓ Everyone is friendly and polite. I always enjoy coming to Thunder Bay.

*Helpful*

- ✓ Last night we had a glass of wine at the Prince Arthur Hotel. The waitress answered so many questions about the area's geography and business.
- ✓ Locals want to tell you about their area, they seem to be proud.
- ✓ Informative and courteous people.
- ✓ Lots of local help and information.
- ✓ Information Centres very helpful.

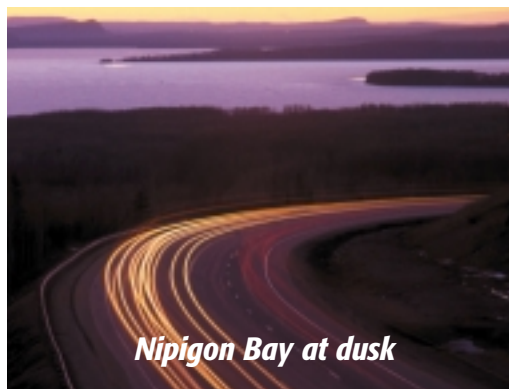
These perceptions of Northwestern Ontarians are corroborated by a recent study of the travel motivations of Americans. "Overall the perceptions that American visitors have of Canada are very positive, with no category having a stronger negative response than positive." (Visitors Motivation Study: A Co-operative Project between North of Superior Tourism Association and Grand Marais Tourism, Shannon Farley,

*"Need lighted walkways in town, biking trails."*

**-Visitor**

*"More resorts and bed and breakfasts and less hotels."*

**-Visitor**



*"Does anyone around here go to the Outdoor Show in Toronto?"*

**-Visitor**

*"As much information needed as possible regarding accommodation availability with Internet access."*

**-Visitor**

April 2007, pg. 10)

## **Conclusions**

According to the information gathered from the PRTD survey, visitors to the North of Superior region are primarily Baby Boomers, between the ages of 36 and 59 years old who have travelled in their own vehicle for a day trip mostly from elsewhere in Ontario and usually spending one night in a hotel/motel. They are attracted to the region because of its scenery and outdoor activities. Many also spend time with family and friends. They find travelling in the region easy and believe the natural beauty and scenery of the region is its greatest asset.

---

### *Recommendation Twenty-Nine/Visitor Recommendation/Accessibility:*

*That the North of Superior region improve accessibility for persons with disabilities.*

"Need better walking trails to attractions for handicapped persons." (Visitor Comment)

---

### *Recommendation Thirty/Visitor Recommendation/Culture and History:*

*That the North of Superior region provide more opportunities for visitors to learn about the region's Aboriginal culture and history.*

"Would like opportunity to learn about area's Aboriginal history and culture." (Visitor Comment)

---

### *Recommendation Thirty-One/Visitor Recommendation/RV Accommodations:*

*That the North of Superior region expand its RV accommodations.*

"More full hook up RV accommodations." (Visitor Comment)

---

### *Recommendation Thirty-Two/Visitor Recommendation/Packaged and Bundled Products:*

*That the North of Superior region provide more packaged/bundled products for visitors.*

"Cross region tour which includes kayaking, night at a B & B, dinner, transportation." (Visitor Comment)

---

### *Recommendation Thirty-Three/Visitor Recommendation/Hiking and Aboriginal Walks:*

*That the North of Superior region create additional (and/or increase promotion of) hiking and Aboriginal walks.*

"Although passing through, would be interested in 1/2 day long hikes and Native walks." (Visitor Comment)

---

### *Recommendation Thirty-Four/Visitor Recommendation/Visitor Needs:*

*That the North of Superior region attempt to cater more fully to visitor needs including developing/improving rest stops, enhancing accommodations and dining and providing the latest in technological communications.*

"Have computers more easily accessible for tourists." (Visitor Comment)

"Not enough restrooms and picnic areas close to the road." (Visitor Comment)

"Far from home, no cell phone coverage or signal low." (Visitor Comment)

"Modernize and cater to tourists." (Visitor Comment)

"Need more accommodations with pop machines and air conditioning." (Visitor Comment)

"As much information needed as possible regarding accommodation availability with Internet access." (Visitor Comment)

---

The following recommendations have been provided by visitors to the region:

## **Appendix C: Geraldton Community Forest – Cultural Mapping Information**

### **What is Cultural Mapping?**

Cultural mapping is the identification and recording of the cultural resources and activities of a community or region. GEOMA's cultural mapping initiative is geared towards cultural tourism with the purpose of reaching those world-wide who will travel for essentially cultural motivations, which may include travel for specific purposes, for example, to attend festivals or to visit sites or monuments, or may be more broadly motivated by the desire to experience cultural diversity or to immerse oneself in the culture of a region.

Through GEOMA's online interactive mapping platform, NOmap ([www.nomap.ca](http://www.nomap.ca)), communities, businesses and organizations can promote primarily the tourism related establishments, activities and services available in their communities and throughout Northern Ontario, making this information freely accessible via the Internet.

### **What is GCF currently undertaking/what has already been complete regarding cultural mapping?**

The Travel Activities and Motivations Survey conducted in 2007 found a dramatic shift in how travellers plan their holidays and trips. They found that 69% of Canadian travellers and 75% of American travellers, who visited Northern Ontario, planned their trips on the Internet. NOmap is an avenue for Northern Ontario communities, businesses and organizations to gain world-wide exposure through the most important marketing tool available today, the Internet. Northern businesses not aggressively promoting themselves online are missing out on a significant amount of potential revenue."

Northern Ontario businesses can put their business on the NOmap as brightly colored points, which people around the world can simply click to expand and reveal information about that particular business including a link to that business's website. NOmap has powerful search functions that allow users to locate features throughout Northern Ontario. NOmap users can search for accommodations, attractions, dining, indoor and outdoor recreation, services, and shopping destinations. Visitors interested in fishing can even find out what fish species are in a specific lake. NOmap is no ordinary online map; it is highly detailed with unique viewing options that show Canoe Routes, Hiking Trails, Cross Country Ski Trails, Townships, Snowmobile Trails, and Wildlife Management Units. Interactive maps are the fastest growing tourism tool today. It's set up for the tourism industry, to help promote tourism in Northern Ontario, so there's no limit as to who it's going out to.

### **Has this been done before in the Region?**

There have been projects of this type completed for the larger centers in Northern Ontario but nothing that has the coverage area or the detail of NOmap.

### **Why did this/how did this initiative come about?**

It began as an idea to promote the Greenstone area three years ago and as mapping data was collected, it was found that it was just as easy to acquire data for the larger area, covering all of Northern Ontario.

### **What are the anticipated end results/products?**

NOmap.ca is the end product.

The desired result is to have a comprehensive, online interactive map promoting Northern Ontario to the world.

### **What is the future of cultural mapping for the Region?**

The Greenstone area is complete, other areas of Northern Ontario have been invited to utilize NOmap and put their data on the map which is easy to do as the product is very user friendly.



**Is this a one time project or something that is "living" and how will it be updated/sustained?**

This is a 'living' project as communities, businesses and organizations can add or edit information easily and regularly.

**Will this information/products be made public and available? How?**

The information on NOmap is available to the free of charge to the public at [www.nomap.ca](http://www.nomap.ca).

**How will cultural mapping benefit the Region?**

GEOMA's cultural mapping initiative is geared towards cultural tourism with the purpose of reaching those world wide who will travel so the benefit will hopefully be an increase in tourism numbers from people who learned of the area online.

**How is this comparable to other areas/cities mapping?**

In many ways, there are details that are not available elsewhere online.

For more information:

Jim Turner

General Manager

Geraldton Community Forest



*Geraldton Interpretive Centre*

## Appendix D: City of Thunder Bay - Cultural Mapping Information

Culture is the fourth pillar of sustainability – cultural vitality is as essential to a healthy and sustainable community as social equity, environmental responsibility and economic viability.

The City of Thunder Bay is currently undergoing a cultural mapping project by which every cultural asset within the city boundaries is being captured into a living inventory<sup>41</sup>. Those assets with location-based characteristics will then be pin-pointed onto a map. The map will be an interactive tool, available online to the general public, so that anyone can see what cultural assets Thunder Bay has, and details of each specific asset.

There are many reasons to engage in a Cultural Mapping project – the City of Thunder Bay has focused on these main outcomes:

- Identifying strengths and locating gaps, needs & overlaps in the community's cultural assets.
- Creating a foundation for planning and decision making.
- Building knowledge (internal and external) of the breadth and variety of cultural activity in the City.
- Locating cultural networks and hubs in the community.
- Understanding the economic impact of the cultural sector in Thunder Bay.
- Leveraging growth – economic development and community capacity.

### Inventory

The cultural mapping database is split into seven categories which reflect the kinds of cultural assets present in Thunder Bay. This format is consistent with mapping projects undertaken in other municipalities. The categories are:

- Cultural Businesses
- Cultural Organizations
- Public Cultural Facilities
- Individual Artists & Cultural Professionals
- Public Art (publicly accessible)
- Festivals & Events
- Heritage

Each category has its own unique set of fields that are designed to collect pertinent information and statistics.

### Map

The seven categories of the cultural mapping project will be layered onto the existing City GIS map. This map is intended to be interactive and web-based so that municipal staff, cultural sector professionals, citizens, and other interested parties can find detailed information about all of Thunder Bay's cultural assets from one source. It would also be useful for tourism purposes such as developing heritage or arts walking tours based on the concentrations of assets identified on the map.

For more information:

Leah Bayly

Supervisor, Cultural Services, Community Services Department, City of Thunder Bay

---

<sup>41</sup> Includes rarely, as necessary, as required, depending on staff and funding, on-going, when opportunities arise, constantly, never, by demand, as suggested or noticed, bi-monthly.

## **Appendix E: An Analysis of Aboriginal Tourism in the North of Superior Region**

### **Objectives**

The objectives of this report were formulated from conversations and interviews with a cross section of Aboriginal business owners and community leaders within the North of Superior region. Working with these individuals, PRTD Researchers were able to identify objectives which included the potential for, and challenges against, growth of Aboriginal tourism in the North of Superior region.

Aboriginal tourism within the North of Superior was identified during the research phase as having significant potential to be expanded and enhanced to attract new visitors and encourage longer stays in the region.

The North of Superior region is rich in Aboriginal culture and history with many opportunities for product development to appeal to existing and new markets. These opportunities need to be identified, bundled and marketed effectively in order to enhance Aboriginal tourism within the Region.

### **Survey Count**

Of the 513 individual interviews conducted with tourism stakeholders across the North of Superior region, 15 were identified as Aboriginal, and have been so identified because they are either operated by, or in some way represent the region's First Nations people. This number is only reflective of the businesses who took part in the PRTD Process.

### **Findings**

It has been determined through research (conducted by the Premier Ranked Tourist Destination research team) that there is significant opportunity and potential to develop Aboriginal tourism products and that many experiences are not currently being capitalized on. Visitors to the region have expressed that they want authentic Aboriginal experiences based on history, culture, take away items and interaction with First Nations people on First Nations land.

Examples of these types of experiences that can be developed, bundled and marketed include but are not limited to:

- Learn about Aboriginal culture
- Learn how to cook authentic Aboriginal food, help with and attend a feast
- Have dinner with an Elder – Enjoy Aboriginal cuisine and listen to the wisdom of an Elder
- Receive an introduction to the language(s)
- Attend a Pow wow or other celebration
- Dine at an authentic Aboriginal themed restaurant
- Stay at an authentic Aboriginal themed accommodation
- Take part in an Aboriginal workshop(s) (ie. Aboriginal artistry, drum making, making dream catchers, etc.)
- Learn about traditional Entertainment (dancers, singers, drummers, etc.)

These are some examples of the types of experiences that could appeal to potential visitors to the North of Superior region. In order to achieve this, they need to be developed, bundled and marketed. These examples are based on experiential tourism, meaning that tourists visiting the region's Aboriginal communities and peoples want to interact with the community and people that they are visiting.

### **Challenges**

The findings indicate that there is immense product opportunity potential surrounding Aboriginal tourism.

There are, however, also several challenges existing in regards to Aboriginal tourism.

The main challenges that have been identified through the research include:

- a) Understanding
- b) Business Management
- c) Partnerships
- d) Infrastructure
- e) Technology
- f) Marketing

a) Understanding

A lack of understanding among First Nations communities is evident both in terms of what tourism is and the positive economic impacts that tourism can have on communities. This 'disconnect' manifests itself across several generations from community elders to younger tourism operators and is possibly a contributing factor to other challenges. Aboriginal people have always participated in the tourism industry but may not have recognized the role that they played in the industry.

If a lack of understanding exists with regards to the impacts of tourism then it would be natural to assume that a tourism focus would not be the community's main goal. Another factor may be the lack of tracking of tourism in Aboriginal communities and products.

Aboriginal organizations and other entities are currently working on (and have been working on) data collection. Although this effort is being made at present there is not a sufficient amount of data to support comparison and/or investment decisions.

---

*Recommendation Thirty-Five/Aboriginal Tourism/Inventory:*

*A collaborative effort should be made to more fully research and catalogue the region's Aboriginal tourism product and develop strategies to develop and promote what is offered.*

---

b) Business Management

The research shows that there is an absence of organized management structure among many Aboriginal businesses that is limiting their potential for growth. Examples of this include, but are not limited to, the absence of business plans and tracking mechanisms, lack of information on return on investment and research of competitors and lack of structure regarding management/staff roles and responsibilities. More structured management guidelines and principles are required.

---

*Recommendation Thirty-Six/Aboriginal Tourism/Training:*

*Small business management training should be extended to more Aboriginal tourism businesses to aid in the organization of their businesses and to help them to plan for future growth. This may best be accomplished working with Economic Development Officers in Aboriginal communities.*

---

c) Partnerships

Partnering has been identified as an area of key concern. A lack of partnering/collaborating and bundling is evident within the entire North of Superior region, including among Aboriginal communities and operators.

---

---

*Recommendation Thirty-Seven/Aboriginal Tourism/Partnerships:*

*Partnership efforts should be created amongst all business owners, including Aboriginal business owners, for the purpose of sharing resources and expertise as well as diminishing the costs associated with advertising and marketing.*

---

d) Infrastructure

The development of tourism within the region's First Nations communities also relies on the development of appropriate infrastructure. This infrastructure not only services the needs of the tourist but it also encourages investment from the private sector to develop competitive tourism products.

With the development of tourism products also comes the development of appropriate infrastructure to meet visitor needs. Infrastructure can include, but is not limited to:

- Accommodations
- Food and Beverage Facilities
- Technological Communications (ie. Internet, cell phone coverage)
- Parking
- Accessible facilities
- Transportation
- Water/Sewage
- Power

Many of the region's First Nations communities lack some of these infrastructure requirements. Due to the remote location of some of the region's First Nations communities, among other issues, these basic infrastructure needs can be costly and challenging to address.

Many of the experiences mentioned earlier may not require development or improvement of infrastructure within First Nations communities. Some of those experiences are already available and with effort, organization and leadership they can be developed and bundled and marketed with relative ease. Larger developments in support of tourist initiatives may require an upgrade or further development of basic infrastructure.

---

*Recommendation Thirty-Eight/Aboriginal Tourism/Infrastructure:*

*First Nations communities should identify infrastructure priorities that may be required to develop longer term tourist products.*

---

e) Technology

During the research phase, it was determined that there is a limited use of the latest technology for the development, organization and promotion of Aboriginal tourism businesses.

Many Aboriginal businesses did not have access to high speed Internet. A limited number of the businesses surveyed used the Internet as a means to promote their businesses and an even smaller number of businesses actually had a website. Many Aboriginal businesses owners did not have up to date business cards or other promotional materials. During the research it was noted that many business owners understood the value of utilizing the Internet, but did not understand either how to use it effectively or who

---

---

*Recommendation Thirty-Nine/Aboriginal Tourism/Technology:*

*Aboriginal tourism business owners need to look at investing in utilizing the Internet to effectively market and sell their products/experiences.*

---

to turn to for help in this area.

f) Marketing

It is clear that a more aggressive approach to the promotion of regional and local Aboriginal businesses is needed. There clearly is demand for unique Aboriginal experiences. Marketing can mean many different things and each business and community is different. The type of marketing approach for one community may not work as well for another community.

Examples of marketing and advertising can include, but is not limited to, the following:

- Updated and accurate business cards
  - Eye catching and effective signage at the business locations as well as within the community and along traffic corridors
  - Brochures/rack cards/flyers that describe the unique product/experience and provide directions and contact information (and placed at high traffic locations)
  - Updated website (and appropriate site name and content for web searches) including pictures, virtual tours, online ordering and testimonials
  - A current market strategy including return on investment
- 

*Recommendation Forty/Aboriginal Tourism/Marketing:*

*More aggressive marketing efforts should be made within the Aboriginal business community (or partnerships of businesses to lower cost) to showcase their unique cultural experiences and handmade items and implement a way of tracking return on investment.*

---

## **Conclusions**

The potential for growth for Aboriginal Tourism within the North of Superior region is significant in that the region's Aboriginal communities do possess the products and experiences that visitors are seeking.

According to Aboriginal Tourism Canada's 2003 Strategic Plan, many travellers state that they are seeking natural wonders and sites, historical sites and important places in history, the experience of different cultures and ways of life, unspoiled nature, adventure and excitement. Aboriginal operators can meet this demand. There is clearly untapped potential for Aboriginal entrepreneurs and Aboriginal tourism experiences in the North of Superior region.

As is the case with other cultural based tourism opportunities, the incentive for tourists to visit the region's First Nations communities and businesses is driven by a desire to learn about authentic cultural and historic experiences and unique forms of art and language. Product opportunities in this regard exist and can be developed and capitalized on.

Through addressing some of the challenges facing Aboriginal tourism, by recognizing that there are experiences that can be developed almost immediately and cost effectively and planning for future tourism growth, Aboriginal tourism in the region can be strengthened.

The Statistics Canada 2006 Census projects an Aboriginal population increase of 20% over five years in the City of Thunder Bay. The region's Aboriginal communities and businesses clearly have the people, the skills, the dedication, the product, the experiences and the pride to enhance and expand Aboriginal tourism.

---



## 1. ԵՐԱՏ ԴՐՊԱՏՈՒՄ

Երաժիշտական քաղաքացիական իրավունքների պաշտպանության օրենքի նպատակն է համապատասխանեցնել իրավունքների պաշտպանության մեխանիզմները և մեթոդները իրավունքների պաշտպանության համակարգի հետևյալ հիմնական սկզբունքներին՝

Դրանք են՝

- իրավունքների պաշտպանության համակարգի մեխանիզմների և մեթոդների համապատասխանեցումը իրավունքների պաշտպանության համակարգի հետևյալ հիմնական սկզբունքներին՝
- իրավունքների պաշտպանության մեխանիզմների և մեթոդների համապատասխանեցումը իրավունքների պաշտպանության համակարգի հետևյալ հիմնական սկզբունքներին՝
- իրավունքների պաշտպանության մեխանիզմների և մեթոդների համապատասխանեցումը իրավունքների պաշտպանության համակարգի հետևյալ հիմնական սկզբունքներին՝
- իրավունքների պաշտպանության մեխանիզմների և մեթոդների համապատասխանեցումը իրավունքների պաշտպանության համակարգի հետևյալ հիմնական սկզբունքներին՝
- իրավունքների պաշտպանության մեխանիզմների և մեթոդների համապատասխանեցումը իրավունքների պաշտպանության համակարգի հետևյալ հիմնական սկզբունքներին՝
- իրավունքների պաշտպանության մեխանիզմների և մեթոդների համապատասխանեցումը իրավունքների պաշտպանության համակարգի հետևյալ հիմնական սկզբունքներին՝
- իրավունքների պաշտպանության մեխանիզմների և մեթոդների համապատասխանեցումը իրավունքների պաշտպանության համակարգի հետևյալ հիմնական սկզբունքներին՝
- իրավունքների պաշտպանության մեխանիզմների և մեթոդների համապատասխանեցումը իրավունքների պաշտպանության համակարգի հետևյալ հիմնական սկզբունքներին՝

Դրանք են՝

Դրանք են՝











- ሊኖረው የሚችል ስርዓቱ በአጠቃላይ ለሌሎች ለማድረግ ምክንያት ሆኖ ሊሰጥ ይችላል።
- ለሌሎች ለማድረግ ምክንያት ሆኖ ሊሰጥ ይችላል።
- ለሌሎች ለማድረግ ምክንያት ሆኖ ሊሰጥ ይችላል።

**የሌሎች ለማድረግ ምክንያት ሆኖ ሊሰጥ ይችላል።**  
**የሌሎች ለማድረግ ምክንያት ሆኖ ሊሰጥ ይችላል።**  
**የሌሎች ለማድረግ ምክንያት ሆኖ ሊሰጥ ይችላል።**  
**የሌሎች ለማድረግ ምክንያት ሆኖ ሊሰጥ ይችላል።**

ሌሎች ለማድረግ ምክንያት ሆኖ ሊሰጥ ይችላል።

የሌሎች ለማድረግ ምክንያት ሆኖ ሊሰጥ ይችላል። የሌሎች ለማድረግ ምክንያት ሆኖ ሊሰጥ ይችላል። የሌሎች ለማድረግ ምክንያት ሆኖ ሊሰጥ ይችላል።

በአጠቃላይ የሌሎች ለማድረግ ምክንያት ሆኖ ሊሰጥ ይችላል። የሌሎች ለማድረግ ምክንያት ሆኖ ሊሰጥ ይችላል። የሌሎች ለማድረግ ምክንያት ሆኖ ሊሰጥ ይችላል። የሌሎች ለማድረግ ምክንያት ሆኖ ሊሰጥ ይችላል።

የሌሎች ለማድረግ ምክንያት ሆኖ ሊሰጥ ይችላል። የሌሎች ለማድረግ ምክንያት ሆኖ ሊሰጥ ይችላል። የሌሎች ለማድረግ ምክንያት ሆኖ ሊሰጥ ይችላል። የሌሎች ለማድረግ ምክንያት ሆኖ ሊሰጥ ይችላል።



## Appendix G: Ontario Parks Report

During the development of the Premier Ranked Tourist Destination (PRTD) Process in the North of Superior region, a partnership was formed with Ontario Parks. Through this partnership the team was able to collect a variety of information specifically pertaining to Ontario Parks within the North of Superior region. The following is a summary of key research collected during the project along with recommendations regarding improving tourism for Ontario Parks.

### Ontario Parks Mission

The purpose of the Provincial Parks and Conservation Reserves Act, 2006 is to permanently protect a system of provincial parks and conservation reserves that includes ecosystems that are representative of all of Ontario's natural regions, protects provincially significant elements of Ontario's natural and cultural heritage, maintains biodiversity and provides opportunities for compatible, ecologically sustainable recreation. The objectives of this Act include:

- To permanently protect representative ecosystems, biodiversity and provincially significant elements of Ontario's natural and cultural heritage and to manage these areas to ensure that ecological integrity is maintained.
- To provide opportunities for ecologically sustainable outdoor recreation opportunities and encourage associated economic benefits.
- To provide opportunities for residents of Ontario and visitors to increase their knowledge and appreciation of Ontario's natural and cultural heritage.
- To facilitate scientific research and to provide points of reference to support monitoring of ecological change on the broader landscape.

Within the North of Superior region, there are eleven operating Ontario Provincial Parks which were surveyed during the PRTD Stage One: Data Collection. Eight of these parks offer both day use and overnight campground facilities. Four of these parks provide backcountry wilderness opportunities and two of these parks provide day-use only facilities:

- Kakabeka Falls Provincial Park – Natural Environment Park  
- Day-Use/Campground – 32 km West of Thunder Bay
- McLeod Provincial Park – Recreation Park  
- Day-Use/Campground – 8 km East of Greenstone
- Neys Provincial Park – Natural Environment Park  
- Day-Use/Campground – 26 km West of Marathon
- Obatanga Provincial Park – Natural Environment Park  
- Day-Use/Campground – 55 km North of Wawa
- Ouimet Canyon Provincial Park – Nature Reserve Park  
- Day-Use Only – 65 km East of Thunder Bay
- Pigeon River Provincial Park – Natural Environment Park  
- Day-Use Only – 68 km West of Thunder Bay
- Rainbow Falls Provincial Park – Recreation Park  
- Day-Use/Campground – 17 km West of Schreiber
- Sleeping Giant Provincial Park – Natural Environment Park  
- Day-Use/Campground/(Interior) – 50 km East of Thunder Bay
- Wabakimi Provincial Park – Wilderness Park  
- (Day-Use)/Interior – 31 km Northwest of Armstrong

- White Lake Provincial Park – Natural Environment Class Park  
- Day-Use/Campground/(Interior) – 60 km East of Marathon
- Quetico Provincial Park – Wilderness Class Park  
- Day-Use/Campground/Interior – 148 km West of Thunder Bay

Quetico Provincial Park was included in the data collection, although this park is not within the boundaries of the North of Superior region. Since Quetico attracts a high volume of visitors (96,344 visitors to the interior and another 4,767 visitors to the Dawson Trail Campground, PRTD research) it was surveyed due to the fact that many of these visitors pass through the North of Superior region to get to the park.

Geographic Origin

The following depicts the geographic origin of visitors to the Provincial Parks in the Region:

- Regional – 53.9%
- U.S. – near Border States – 19.6%
- Provincial, outside Region – 17.5%
- National – Outside Ontario – 5.95%
- U.S. – long haul – 1.80%
- International – 1.25%

Both of the wilderness parks (i.e. Quetico and Wabakimi) show their highest amount of visitors (40% – 85%) originate from the U.S. - near Border States.

Existing Visitor Profile

The following represents the types of visitors who currently visit the region’s Provincial Parks:

- Leisure - Independent travellers – 80.5%
- Other – 11.25%
- Leisure – Small group – 6.1%
- Leisure – Large group/motor coach – 1.25%
- Business – Individual business travellers – 0.4%
- Business – meetings/conferences – 0.35%
- Incentive travel – 0.10%

*\*Note: "Other" visitors include but are not limited to families, hiking enthusiasts, canoeists/kayakers, older adults, fishing enthusiasts, cross country skiers, photographers and artists.*

During PRTD research it was noted that the Ontario Parks within the North of Superior region provide barrier-free facilities for persons with disabilities. The following chart depicts the barrier-free services/facilities that the Provincial Parks within the North of Superior region provide:

<b>Service/Facility</b>	<b>% of parks that offer the service/facility</b>
Wheelchair accessible washrooms	94.4%
Wheelchair accessible handicap parking	88.9%
Entrance Ramp	61.1%
Wheelchair accessible programs/equipment	50%
Other *	50%
Wheelchair accessible food/beverage facilities	5.6%

*\*Note: "Other" includes barrier-free campsites, hiking trails, Visitor Centers, laundromats and showers.*



---

*Recommendation Forty-One/Ontario Parks/Marketing:*

*It is recommended that Ontario Parks takes into consideration the data derived from the PRTD Process during the development of future marketing strategies.*

---

Visitation

According to PRTD research 78.9% of our parks surveyed expressed that they have experienced a decline in visitors over the last three years. Of these parks, 47.4% expressed that they had a decrease of 1-10% within the last three years and 42.1% expressed a decrease of 11-25% within the last three years.

Although the PRTD Visitor Survey did not specifically ask why the parks experienced decreased visitation; some comments collected that may be contributing to this include, but are not limited to:

- Fuel cost
- Border crossing and new passport regulations
- Value of the Canadian dollar
- Increase in Provincial Park fees

Length of Stay

Visitors to Provincial Parks for day-use (in the North of Superior region) stayed approximately 2 – 4 hours. The Parks noticing the longer of those day use stays are MacLeod, Neys, Quetico (Dawson Trail Campground), Sleeping Giant and White Lake.

Provincial Parks with campgrounds in the North of Superior region experience 25% of visitors staying two days and 20% of visitors staying 4 – 10 days. The Parks noticing the longer of those overnight stays are MacLeod, Quetico (Dawson Trail Campground), Quetico (interior) and Wabakimi (interior).

Programs/Experiences

The following programs/experiences are offered at the Provincial Parks in the North of Superior region (include but are not limited to):

- Swimming 100% (of parks surveyed)
- Nature Observation 100%
- Bird watching 100%
- Day Hiking 92.3%
- Wildlife Watching 76.9%
- NHE Programs (Natural Heritage Education) 54.5%
- Cross-Country Skiing 53.8%
- Hiking – Overnight 38.5%
- Visitor Centers 38.5%

*\*Note: It was also noted that Ontario Parks offer camping (9 of 11 parks surveyed), fishing, rentals and scenic falls viewing (i.e. Kakabeka Falls, Pigeon River Provincial Parks)*

Product Opportunity

According to PRTD research 63.2% of the operating parks have developed, renewed and/or expanded within the last two years including both infrastructure and renovation investments.

80% of parks surveyed have plans to modify or expand their operation within the next three years.

These modifications/expansions include but are not limited to:

- Continual upgrading and maintenance of facilities as required
- Electrical campsites
- Comfort stations
- Signage
- Trail maintenance
- Barrier-free campsites

Ontario Parks is responsible for the planning, management and operation of a network of 330 Provincial Parks across the province. In total, these parks cover just over eight percent of the province's land base. Within the North of Superior region there are 11 operating and 51 non-operating Provincial Parks. Each Provincial Park has a management direction document that provides detailed information about the park's natural and cultural resources, existing use and potential for development and operations.

Park development, operations and resource stewardship is contingent upon its Management Plan directive including the development of a Business Case and the availability of funding on a priority basis. Funding may be derived from a variety of sources, including government and private sector sources. Implementation of a park management plan and the operation of a park must meet the requirements of the Environmental Assessment Act, Provincial Parks and Conservation Reserves Act and other applicable legislation. The Non-Resident Crown Land Camping fee applies in all non-operating parks.

Ontario Parks provide representation of Ontario's most distinctive landscape features, provide protection for plant and animal species, include many nationally significant cultural and historical landmarks, present exceptional natural heritage educational programs and offer a complete range of outdoor recreational activities from swimming, to canoe tripping, hiking to cross-country skiing, and backcountry tenting to RV camping and alternate accommodations like cabins and yurts.

For the purpose of the PRTD study, information collected concentrated on the operating Provincial Parks within the North of Superior region.

---

*Recommendation Forty-Two/Ontario Parks/Product Opportunities:*

*It is recommended that Ontario Parks takes into consideration the product opportunities identified during the PRTD Process during the review of existing and future park operations.*

---

## **Conclusion**

The information gathered during the PRTD process in the North of Superior region will prove to be a useful tool when reviewing future park operations and marketing strategies. While visitation has decreased slightly, Ontario Parks plans to continue to modify and upgrade their facilities. Ample activities, barrier-free facilities/services, and the draw of the outdoors keep visitors regularly returning. If the above recommendations are implemented it will contribute to improving tourism and visitation to Ontario Parks in the North of Superior region, therefore also improving tourism within the North of Superior region as a whole.

For more information:

Barb Rees

Natural Heritage Education/Marketing Specialist, Ontario Parks

Email: [barb.rees@ontario.ca](mailto:barb.rees@ontario.ca)

Figure 1

Ontario Parks and Protected Areas within the North of Superior Region



## Appendix H: Transportation and Travel Trade Checklist

A total of 26 representatives from transportation businesses across the region were interviewed. Below is the list of transportation businesses that the PRTD Researchers collected information from.

1. Geraldton District Airport, Geraldton
2. Wasaya Airways, Thunder Bay
3. Air Canada Jazz, Thunder Bay
4. West Jet Airlines, Thunder Bay
5. Mesaba Airlines, Thunder Bay
6. Enterprise Rent A Car, Thunder Bay
7. National Car Rental, Thunder Bay
8. Thunder Airlines Ltd., Thunder Bay
9. Budget Car and Truck Rental, Thunder Bay
10. National Tilden, Manitowadge
11. Roach's Yellow Taxi, Thunder Bay
12. Bearskin Airlines, Thunder Bay
13. Hertz Rent A Car, Thunder Bay
14. Avis Car and Truck Rental, Thunder Bay
15. Ball Bus Lines, Dorion
16. Greyhound Bus, Nipigon
17. Nipigon Taxi, Nipigon

### Under Tours and Excursions

18. TPI Travel, Geraldton
19. CAA Travel, Thunder Bay
20. Lake Superior Visits, Thunder Bay
21. Carlson Wagonlit Travel, Thunder Bay
22. Slate Island Shuttle, Terrace Bay
23. Happy Time Tours and Travel, Thunder Bay
24. Norcan Tours, Thunder Bay
25. Thunder Bay Travel/My Travel, Thunder Bay
26. Marlin Travel, Thunder Bay

### **Region's Access Routes**

- Highway 11 from Hearst, Kapuskasing, Quebec
- Highway 17 from Sault Ste. Marie, Sudbury, Toronto, Michigan
- Highway 61 to Pigeon River, Grand Marais, Grand Portage, Duluth, Minneapolis, Wisconsin
- Highway 11 to Atikokan, Fort Frances, International Falls
- Highway 17 to Ignace, Dryden, Winnipeg

## Notes

- Taxi companies either surveyed or spoke with do not necessarily brief/train all of their drivers (some train some and some train none) on the Region's strengths/attractions.
- Thunder Bay's Airport is International.
- Some taxi companies in the smaller communities (ie. Nipigon) are not open 24/7 unless arranged in advance.
- Major airport is in Thunder Bay. Secondary airports are in Marathon, Manitouwadge, Terrace Bay, Geraldton, Nakina. These airports are not all like Thunder Bay's. Some of them only have private/charter planes landing/taking off. Thunder Bay is the only airport in the Region that has numerous amounts of well-known airlines (ie. West Jet, AirCanada, Bearskin, etc.).
- The Region also has the TransCanada Highway (17).
- The Region's smaller communities do not have public transportation as the City of Thunder Bay does.
- Only attractions within City of Thunder Bay limits have public transportation available.
- Signage has been a difficult barrier to overcome in the Region. Tourist operators have told us that (especially the small Ma and Pa businesses) signage takes a long time and is a difficult thing to get approved and is very expensive.
- Our OFSC Snowmobile Trail currently being worked on to open from Kakabeka to Nipigon. This route at present is not open and snowmobilers must trailer their sleds at a cost. In April 2008 NOSSA stated that they are in the process of hiring laborers and a coordinator to work with the consulting firm to get this trail opened. The team would like to see the trail open via a re-route for the next winter season.
- For years now the Region has been discussing a passenger excursion train. The status of this is being researched.

## Transportation Resources Checklist

Yes No

### Attribute

- |   |   |   |
|---|---|---|
| 1. a. The destination has at least one easily accessed Visitor Information Centre,  | ■ |   |
| b. on a major transportation route.   | ■ |   |
| c. with clear and frequent directional signage  | ■ |   |
| 2. a. Major tourist transportation routes to downtown(s) have frequent directional signage,   | ■ |   |
| b. well-maintained road surfaces,   |   | ■ |
| c. and attractively maintained public spaces.   |   | ■ |
| 3. a. Transportation routes to major attractions have frequent directional signage,   | ■ |   |
| b. well-maintained road surfaces,   |   | ■ |
| c. and attractively maintained public spaces.   | ■ |   |
| 4. Shuttle services or taxis and Tourist orientation information are available at transportation terminals  | ■ |   |
| 5. Tourist traffic congestion and way-finding problems are addressed by transit-based interventions, e.g., municipal transit, shuttle services, People Movers, satellite parking. | ■ |   |
| 6. Transit services to core attractions have schedules that accord with attractions' hours of operation.  |   | ■ |

- 7. a. Taxi drivers have been given service delivery training, ■
- b. and briefing on tourist attraction locations. ■
- 8. All attractions serving the coach tour market have sufficient on-site bus parking, ■  
Or there is convenient access to a bus parking/staging area.

**Travel Trade Resources Checklist**

Yes No

**Attribute**

- 1. A complete inventory of receptive tour operators bringing coach or FIT travel to the destination. ■
- 2. Receptive tour operators have been contacted to identify:
  - a. The attractions, accommodations and other facilities visited, and visitation volumes; ■
  - b. issues e.g., parking, that impair visitation or the visitor experience; ■
  - c. opportunities to improve the visitor experience and increase visitation; and ■
  - d. other assets that, with additional investment, could attract group tour visitation. ■
- 3. A local receptive tour operator sits on a Workbook implementation committee. ■
- 4. A complete [smaller areas] or comprehensive cross sectional [larger centres] inventory of local travel agents serving clientele resident in the destination area has been compiled. ■
- 5. Travel agents have been contacted to determine:
  - a. Their perceptions of opportunities to package travel experiences within the destination area; ■
  - b. their interest in packaging travel experiences within the destination area; ■
  - c. their perceptions of opportunities to improve the visitor experience and increase visitation to the area. ■
- 6. A Local travel agent sits on a Workbook implementation committee. ■

*"Need one tourist organization to be reflective in the region with regards to publications."*  
-Tourist Operator

*"Need to fix the local roads and highways; they need to be repaved and their hardtop restored."*  
-Tourist Operator



*Battle Island lighthouse at Rosspoint*



*Sailing Regatta - Thunder Bay*

*"Promote your lighthouses."*  
-Tourist Operator

*"There should be a bicycle rental site."*  
-Tourist Operator

## Appendix I: City of Thunder Bay – Sport Tourism Survey Results

Sport tourism comprises several different levels of involvement. It involves an athlete of any caliber, an official, or a spectator travelling to a venue to participate in, practice or simply observe a particular sporting event, training camp and/or sport meeting.

According to the Canadian Tourism Commission, it is estimated that an annual economic impact of \$1.3 billion is generated by sports travel in Canada.

Market researchers with the Premier Ranked Tourist Destination Process met with representatives of many sporting facilities and sporting events within Thunder Bay to conduct interviews using a survey questionnaire. The purpose of these interviews was to gather information about sports tourism within Thunder Bay not only to aid in the PRTD Process but to also provide information to the City of Thunder Bay, which is working with the Sports Bid Administrative Advisory Committee in the development of a Sport Tourism Policy and Plan. The policy will help Thunder Bay attract larger scale events and help attract more visitors to existing events, attract training camps and help create new events.

The City of Thunder Bay holds an impressive reputation for accommodating large sporting events including the Canada Summer Games, Nordic World Ski Championships, and the Ontario Games for the Physically Disabled. These championship events were successful not only because Thunder Bay possesses an array of sports facilities, but also because Thunder Bay came together as a community with citizens and businesses donating their time, energy and resources.

Below are the results of some of the findings collected during interviews with Thunder Bay's Sporting Facilities and Sporting Events representatives. Please note that all the sporting facilities and sporting events in Thunder Bay were not represented in these interviews.

Representatives from 47 Sporting Facilities within the City of Thunder Bay were interviewed. Below are some of the results of these interviews.

Would you consider at least 20% of your business activity is generated from visitors outside the immediate area?

YES	21.7%
NO	78.3%

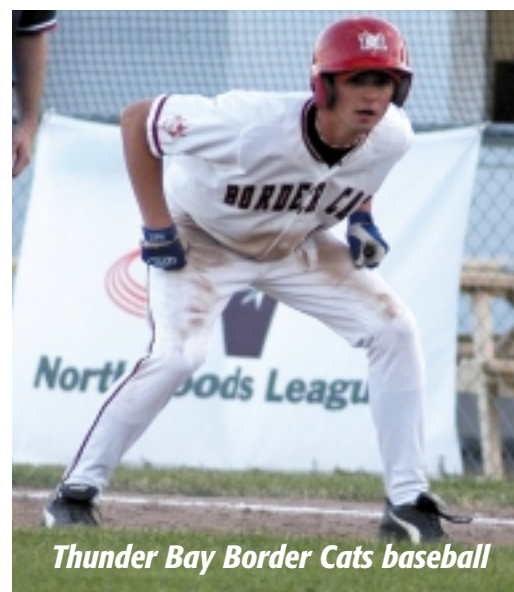
What percentage of your business is:

Leisure - Independent Travellers	67.62%
Leisure – Large Group/Motor coach	6.26%
Leisure – Small Group	38.26%
Business – Individual	2.07%
Business Meetings/Conferences	8.29%
Incentive	2.14%

What is the average length of stay at your establishment?

Less than 1 hour	0%
1-2 hours	46.7%
3-5 hours	48.9%
6-8 hours	4.4%

*"No place to rent wind surf boards."  
-Visitor*



Do you offer meeting, conference, convention, or banquet facilities?

YES 37.8%  
NO 62.2%

Where can your product/experience be purchased by the visitor?

On-site 100%  
Local third parties 23.3%  
Outside the destination third parties 4.7%  
Internet 18.6%  
Toll free number 4.7%

91.7% of the sporting event representatives interviewed indicated that they use the Internet to promote the event and 85.7% of sporting facility representatives indicated that they use the Internet to promote their facilities. Although the results indicate that a large amount of promotion occurs using the Internet, only 18.6% of representatives indicated that their product/experience can be purchased online.

---

*Recommendation Forty-Three/Sports Tourism/Technology:*

*Representatives of sporting events and facilities should investigate opportunities to enhance the use of technology to better promote events, provide online registration, and to publish scores and event results.*

---

Does your facility have on-site bus parking for the motor coach market?

YES 88.9%  
NO 11.1%

Which of the following services or facilities does your establishment provide for people with disabilities?

Entrance Ramp 61.0%  
Wheelchair accessible programs/equipment 61.0%  
Wheelchair accessible/handicapped parking 95.1%  
Wheelchair accessible washrooms 85.4%  
Wheelchair accessible food and beverage facilities 75.6%

Have your prices increased, decreased or stayed about the same in the last three years?

Stayed about the same 55%  
Increased 45%  
Decreased 0%

Do you provide customer comment or guest survey cards?

YES 30.2%  
NO 69.8%



Approximately how many people attended/visited your business in the last full season or year?

1-1,000	2.6%
1,001-5,000	28.9%
5,001-10,000	10.5%
10,001-50,000	28.9%
50,001-100,000	7.9%
100,001 +	21.1%

Has visitation increased, decreased or stayed about the same in the last three years?

Stayed about the same	55.8%
Increased	23.3%
Decreased	20.9%

Do you offer or are you part of a package that includes accommodations, restaurants, attractions or events?

YES	28.6%
NO	71.4%

Do you provide customer service training to your employees?

YES	72.1%
NO	27.9%

Have you invested capital to renew, expand or develop your facility/product in the last 2 years or the last 5 years?

	YES	NO
LAST 2 YEARS	77.8%	22.2%
LAST 5 YEARS	81.6%	18.4%

Do you have plans to modify or expand your operation in the next three years?

YES	59.5%
NO	40.5%

What is the maximum number of guests that your facility can serve as any one time?

1-500	54.3%
501-1,000	17.1%
1,001-5,000	25.7%
5001 +	2.9%

In your opinion is there a sufficient pool of trained labor to support your business over the long term?

YES	76.2%
NO	23.8%

Does your establishment offer child care services for parents during their use of your facility/service?

YES	4.7%
NO	95.3%

List the Events that your facility would like to attract.

- Trade shows
- Demonstration days
- Corporate events/business parties
- Higher level cross country running
- International ski competition for disabled
- Ontario Winter Games
- Outdoor concerts, Jazz Festivals
- Provincial Championships
- Professional Develop League
- Training facility for multi-sport events
- Provincial swim/dive competitions
- National swim/dive competitions
- Figure skating and speeding skating competitions
- Gymnastic competitions
- Marital arts competitions
- Golf schools
- Olympic Qualification Series
- 2010 World Championships
- Football Jr. Events
- Championship outdoor concerts
- Provincial Championships
- Concert figure skating
- Wrestling events
- Provincial target championships
- Ontario Summer Games

Representatives from 15 Sporting Events within the City of Thunder Bay were interviewed. Below are some of the results which came out of these interviews.

Is the primary event site accessible by public transportation within three blocks?

YES 73.3%  
NO 26.7%

Has the event expanded, decreased or stayed relatively the same in regards to attendance (in the past three years)?

Expanded	33.3%
Decreased	13.3%
Stayed Relatively the Same	53.5%

Has the event expanded, decreased or stayed relatively the same in regards to the amount of entertainment/length of event/services offered, etc. (in the past three years)?

Expanded	20%
Decreased	0%
Stayed Relatively the Same	80%

Which of the following services does the event provide for people with disabilities?

Entrance Ramp	33.3%
Wheelchair accessible programs/equipment	33.3%
Wheelchair accessible/handicapped parking	77.8%
Wheelchair accessible washrooms	77.8%
Wheelchair accessible food and beverage facilities	44.4%

According to the City of Thunder Bay Sport Tourism Policy and Plan, Draft for Discussion, sport tourism is recognized as a viable and important segment of the nation's tourism industry. The purpose of the Sport Tourism Policy and Plan is to clearly establish principles and priorities necessary to build the sport event hosting capacity of the City of Thunder Bay and to take full advantage of sport tourism opportunities available to Thunder Bay. The Policy and Plan will identify the best opportunities for future growth and a solid return on investment. This in turn can increase tourism potential to the City of Thunder Bay and within the Region as a whole.

According to the Sport Tourism Policy and Plan, Draft for Discussion, sport tourism opportunities have many benefits to a community. These include:

- Build community pride, spirit and excitement
- Benefit the local sport system through the development of volunteers, athletes, coaches, officials and facilities
- Generate positive economic benefits by attracting and hosting visitors
- Showcase the community to national and international audiences
- Promote health and active living

---

*Recommendation Forty-Four/Sports Tourism/Importance:*

*That the City of Thunder Bay and other communities within the North of Superior region continue to look at sports tourism as a way of attracting a higher number of visitors and focus on developing the facilities, capacity and ability to host such events.*

---

For more information:

Paul Burke

Special Events Developer

Recreation and Culture Division

City of Thunder Bay

Email: pburke@thunderbay.ca

## **Appendix J: Resource Group Steering Committee Members and Sectoral Committee Members**

### **Resource Group Steering Committee Members:**

Bruce Fallen, North of Superior Tourism Association  
Paul Pepe, City of Thunder Bay, Tourism Manager  
Beverly Ball, City of Thunder Bay, Recreation and Culture  
Fort William First Nation  
Steve and Patricia Behun, Wolf River Campground/Dorion Economic Development  
Chantal Bohemier, Association Francophones de Nord-Ouest de L'Ontario (AFNOO)  
Dan Brenzavich, Northwestern Ontario Development Network (NODN)  
Doug Brown, Superior Display and Distribution  
Ed Chambers, Dorion Economic Development  
Jay Daiter, Municipality of Greenstone, North of Superior Tourism Association  
Bev Dale, Municipality of Neebing  
Yvon Desroches, Greenstone Community Adjustment Committee  
Allyson Dryden, North of Superior Tourism Association  
Michael Esquega Jr., Rocky Bay Economic Development  
JP Fraser, Lake Superior Projects  
Representative from the Ministry of Northern Development and Mines,  
Northern Ontario Heritage Fund Corporation  
Dwight Gessie, City of Thunder Bay, Parks Division  
Linda Gilbert, Pic Mobert First Nation, Economic Development  
Mervi Henttonen, Lakehead Region Conservation Authority  
Albert Holder, Hurkett Local Services Board  
Tara Ingram, Northern Ontario Native Tourism Association  
Harry Kelly, Municipality of Greenstone, Economic Development  
Rhonda Koster, Lakehead University, Outdoor Recreation, Parks and Tourism  
Sarah Lewis, Township of Nipigon, Community Development Officer  
Tim Lukinuk, Amethyst Mine Panorama and Gift Shop, North of Superior Tourism Association  
Peggy Lynch, Brighter Futures, Rocky Bay  
Dean Main, Municipality of Terrace Bay, Economic Development  
Kirstine Metansinine, Red Rock Indian Band, Economic Development  
Iain Mettam, Ministry of Natural Resources, Great Lakes Heritage Coast  
Dyane Menard, Superior North Community Futures Development Corporation  
North of Superior Snowmobile Association  
Stephane Parent, Geraldton Times Star  
Gord Pauluik, Oliver Paipoonge BIA  
Dave Raymond, Municipality of Manitouwadge Economic Development

---

Barb Rees, Ontario Parks  
Eric Rutherford, Municipality of Greenstone  
Daryl Skworchinski, Municipality of Marathon  
Sam Sobush, Township of Red Rock  
Barry Streib, Northern Ontario Associated Chambers of Commerce  
Heidi Strobl, FedNor  
Jim Turner, Geraldton Community Forest  
Dina Quenneville, Greenstone Economic Development  
Giannina Veltri, Confederation College  
Anthony Friedrich, Community Development, Schreiber  
Paul Samson, Ontario Ministry of Tourism

### **Sectoral Committee Members**

#### **Accommodations**

Gary & Jodi Almgren, Beaver Motor Motel (Nipigon)  
Rene Gurtner and Travis Batting, Valhalla Inn (Thunder Bay)  
Steve & Pat Behun, Wolf River Campground (Dorion)  
Marlis Bommers-Dudzinski, Kakabeka Falls Motor Motel  
Sherri & Ray Boudreau, Lakeview Manor B & B (Marathon)  
Mary & Roger Burnett, Serendipity Gardens, Café and Guesthouse (Rossport)  
Dennis & Patti Fisher, Coach House Motel (Jackfish Lake)  
Ivan Gauthier, Park Bay Motel and Restaurant (Geraldton)  
Kevin Kalyta, Days Inn and Suites (Thunder Bay)  
Brigit Knoll McArthur and Linda Jackson, Circle Route/Voyageur Esso (Schreiber)  
Michael Poleck, Best Western Crossroads Motel (Thunder Bay)  
Lorne Sarmiento, Victoria Inn (Thunder Bay), White Water Golf Course  
Tony Scarcello, Prince Arthur Waterfront Hotel and Suites (Thunder Bay)  
Sandra J. Svenkeson, Marathon Harbour Inn  
Jeff Zechner, Red Rock Inn  
Nicole and Danielle, L'Oree Des Bois Motel (Longlac)  
Golden Nugget Motel (Geraldton)

#### **Attractions**

Iain Angus, The Friends of Chippewa Park (Thunder Bay)  
Don Belluz, Belluz Farms (Oliver Paipoonge)  
Timothy & Brenda Carroll, Nighthawk Charters (Beardmore)  
Sid Ellis, Canyon Country Links (Dorion)  
Chris Ficek, Fort William Historical Park (Thunder Bay)  
Shantelle Graham, Thunder Bay Charity Casino

Bob Halvorsen, Thunder Bay Community Auditorium  
Bruce Hyer, Wildwaters Canoe and Kayak Shop (Thunder Bay)  
Fran Loney, Founders' Museum and Pioneer Village (Oliver Paipoonge)  
Tim Lukinuk, Amethyst Mine Panorama (Dorion)  
Alastair MacKay, Thunder Bay Art Gallery  
Gord Pauluik, Wildside Recreation Inc. (Oliver Paipoonge)  
Gerry Poling, Thunder Bay Historical Museum

### **Festivals and Events**

Brian Campbell, Live from the Rock (Red Rock)  
Chris Ficek, Rock the Fort (Thunder Bay)  
James Foulds, Nipigon Fall Fishing Festival  
Bob Halvorsen, Thunder Bay Community Auditorium  
Rob Kurish, Geraldton Recreation  
Barry Streib, Thunder Bay Blues Festival  
Cathy Woodbeck, Folklore Festival (Thunder Bay)

### **Food and Beverage**

Kate & Doug Beaucage, Nipigon Husky House  
Brigit & Knoll McArthur and Linda Jackson, Voyageur Esso (Schreiber)  
Lori Paras, The Farmer's Mercantile (Nolalu), Ruby Moon (Thunder Bay)  
Tom Pazianos, Thunder Bay Keg  
Jean Robillard, Bistro One, Thunder Bay  
Jeff Zechner, Red Rock Inn

### **Marinas**

Brad Buck, North of Superior Marina Marketing Association  
Anthony Friedrich, Municipality of Schreiber, Community Development  
Dwight Gessie, City of Thunder Bay, Parks Division

### **Outfitters**

Paul & Judy Boucher, Ogoki Frontier Outfitters (Armstrong)  
Malcolm Leuenberger, Leuenberger's Fly-In Lodge and Wilderness Outposts (Nakina)  
Arlene & Grant Maki, Northland Outfitters (Nakina)  
John & Gloria Ritch, Ogoki Lake Outfitters (Nakina)  
Elson & Kim Strickland, Due North Outpost Camps (Armstrong)  
Yolanda Wanakamik, Mattice Lake Outfitters (Armstrong)

## **Parks and Trails**

Brian Davis, The Land of the Nipigon Waterways Association

Dwight Gessie, City of Thunder Bay, Parks Division

Svenja Hansen, Parks Canada

Shelly Marinis, Parks Canada

Barb Rees, Ontario Parks

## **Retail**

Stacey Ball, Intercity Shopping Centre (Thunder Bay)

Barb Harris, Canyon Country (Dorion)

Jaakko Natri, Natribros Surf (Thunder Bay)

Theresa Nelson, Spirit Stone Creations (Beardmore)

Lisette Pelletier, Pelletier's Jewellers and Flowers (Nipigon)

Diane Petryna, Take a Hike (Thunder Bay)

Jeff Prochnicki, Lac Des Milles Lac One Stop (Upsala)

Jerry & Sherry Ruddy, Rocksville Amethyst and Gift Shoppe (Thunder Bay)

Leslie Zechner, Zechner's Food Mart (Nipigon)

Downtown Heart of the Harbour (Thunder Bay)

## **Tours and Excursions**

Gregory Heroux, Sail Superior (Thunder Bay)

Lois Nuttall, Lake Superior Visits (Thunder Bay)

Phil McGuire, EcoPhotoGuide and McGuire Farm and Greenhouses (Nipigon/Red Rock)

Happy Time Tours (Thunder Bay)

Norcan Tours (Thunder Bay)

## **Transportation**

Rob Basaraba, NACAIR

John Beardy, Wasaya Airlines

Shane Carson, WestJet

Alan Cheeseman, Wilderness North

Ron Hell, Bearskin Airlines

Larry Lambert, Ontario Ministry of Transportation

Suzan Leuenberger, Air Canada Jazz

*Note: Sectoral Committee Members have either contributed input and/or have received and reviewed interim reports throughout the PRTD Process. The ideas/views/opinions of this report may not necessarily reflect the exact views of the above-mentioned individuals.*

## **Appendix K: Acknowledgments**

### **With special thanks to:**

PRTD Researchers: Ryan Bayly, David Dunlop, Brandi Dupuis, Danielle Hutterli, Leona Sutton, Ashley Wolfe

Jim Turner and Jay Lucus, Geraldton Community Forest

Allyson Dryden, North of Superior Tourism Association

Ryan Bayly, Contract Writer

Rhonda Koster, Lakehead University, Outdoor Recreation, Parks and Tourism

Harvey Lemelin, Lakehead University, Outdoor Recreation, Parks and Tourism

Paul Burke, City of Thunder Bay, Community Services

Katherine Ball, City of Thunder Bay, Tourism Division

Justin Molkoski, City of Thunder Bay, Recreation and Culture

Leah Bayly, City of Thunder Bay, Community Services

Paul Samson, Ontario Ministry of Tourism

Maps Provided by: North of Superior Tourism Association, Parks Canada, Ontario Parks

Vicky Angees, Ojibway (syllabics), Translator, Wawatay Native Communications

Aki Peltonen Creative Services, Graphic Design, PRTD Final Report

Deborah Poole Hoffman, Graph-X by Deb, PRTD Final Report Printing

Gilles Dignard, French Translation

Larissa Denault, Tourism Research Officer, Ontario Ministry of Tourism

Adele Labine-Romain, Tourism Research Officer, Ontario Ministry of Tourism

Donna Nilson, Ontario Parks

Lakehead University (Industry Session Host)

Rocky Bay Community Centre (Industry Session Host)

Representatives from across the region that provided information for Appendix A: Regional Tourism Profiles  
– Emerging Attractions/Upcoming Developments

Gary, Joanie and Sila McGuffin

### **Tourism Industry Session Participants:**

Donna Nilson, Ontario Parks

JP Fraser, Lake Superior Projects

Tamara Lindahl, Lake Superior Projects

Bruce Fallen, North of Superior Tourism Association

Yvon Desroches, Greenstone Community Adjustment Committee

Kris Mork, Thunder Bay CEDC

Rhonda Koster, Lakehead University, Outdoor Parks and Recreation

Kerri Reid, The Friends of Chippewa Park

Paul Pepe, City of Thunder Bay, Tourism Division

Tim Lukinuk, North of Superior Tourism Association



RoseMarie Mancusa, City of Thunder Bay, Tourism Division  
Barb Rees, Ontario Parks  
Katherine Turner, FedNor  
Peggy Lynch, Brighter Futures, Rocky Bay  
Harry Kelly, Municipality of Greenstone, Economic Development

A sincere apology to anyone who was not included in the Acknowledgements and Special Thanks that should have been mentioned.

## Appendix L: Glossary of Terms and Acronyms

### **Animation**

Animation is a type of optical illusion involving the appearance of motion caused by displaying still images one after another. Often, animation is used for entertainment purposes. Animation has a place in learning and instructional applications as well<sup>42</sup>.

### **Association des Francophones du Nord-Ouest de l'Ontario (AFNOO)**

An association to promote the Francophone community in Northwestern Ontario at the political, educational, economic, linguistic, social and cultural levels.

### **Backcountry**

A term usually applied to wilderness areas where there are no permanent access roads, developments or settlements. Camping facilities are generally primitive (fire pit, tent pads, pit privy) and few other facilities exist.

### **Bundling**

The practice of joining related products together for the purpose of selling them as a single unit.

### **Business Improvement Association (BIA)**

An association with the main focuses being to improve the attractiveness of an area and to promote that area as a good place to shop, visit and do business.

### **Comfort Station**

An outhouse (also known as a privy - usually refers to a type of toilet in a small structure separate from the main building which does not have a flush or sewer attached).

### **Common Voice Northwest (CVNW)**

The Northwestern Ontario Common Voice Northwest Initiative was undertaken by the Northwestern Ontario Municipal Association to engage and mobilize the leadership of Northwestern Ontario to "chart their own course within the Province and the country by addressing regional challenges with realistic Northern solutions".

### **Community Futures Development Corporations (CFDC)**

Funded through FedNor, these are community-based, non-profit organizations which support community economic development by assisting communities located within their catchment area to strengthen and diversify their economies. Superior North CFDC and Thunder Bay Ventures are the region's CFDCs.

### **Core Attraction**

The feature(s), facility(ies), and/or experiences which are the main reason for most travel to the destination. Core attractions can differ from season to season, may also vary for mass versus niche markets and can also be a cluster of assets.

### **DMO**

A Destination Marketing Organization – a generic term for any agency, department or organization with a mandate to promote and develop tourism in a geographic area.

### **Economuseum®**

Touring routes in Quebec and Atlantic Canada that promote agri-food and artisan businesses.

---

<sup>42</sup> www.wisegeek.com

## **FIT**

The Fully Independent Travel market – visitors making their own plans and travel arrangements.

## **Fort William First Nation (FWFN)**

Fort William First Nation is an Ojibway First Nation south of and adjacent to. As of January 2008, the First Nation had a registered population of 1,798 people, of which their on-Reserve population was 832 people<sup>43</sup>.

## **Fort William Historical Park (FWHP)**

A provincially-funded historic site operated by the Ontario Ministry of Tourism depicting the fur trade activities of the North West Company at Fort William Historical Park, inland headquarters and site of the Company's annual Rendezvous from 1803-1821.

## **Gross Domestic Product (GDP)**

The gross domestic product or gross domestic income (GDI) is one of the measures of national income and output for a given country's economy. GDP is defined as the total market value of all final goods and services produced within the country in a given period of time (usually a calendar year). It is also considered the sum of value added at every stage of production (the intermediate stages) of all final goods and services produced within a country in a given period of time, and it is given a money value<sup>44</sup>.

## **GEOMA**

The GIS division of Geraldton Community Forest. Created in 2007, GEOMA was derived from the Gaelic word "Teoma" meaning "expert". GEOMA was developed to better represent and market GIS division of GCF. The GCF/GEOMA head office is located in Greenstone.

## **Geraldton Community Forest (GCF)**

A non-profit organization established to further the concept of sustainable forest management, to seek out employment opportunities supporting local economies and to create a sustainable and improved forest land base and a sustainable economy through community management of natural resources by utilizing sustainable ecosystem approaches and environmentally sound practices.

## **Great Lakes Heritage Coast (GLHC)**

A project (within the Ministry of Natural Resources) with the aim to protect the shoreline of Georgian Bay, Lake Heron and areas along the Killarney Coastline. The shoreline of the Great Lakes encompasses southern Georgian Bay to the north shore of Lake Superior.

## **High Quality Tourist Experience**

A travel experience which exceeds the guest's expectations (as expressed by S. Riley & J. Cunningham in their The Magic of Your Success presentation to the Tourism Federation of Ontario Conference, March 28, 2001).

## **Incentive Travel**

Vacation travel arranged by or through an employer and awarded as a motivational bonus to eligible employees or salespersons.

## **Lakehead Region Conservation Authority (LRCA)**

A community-based environmental agency responsible for the wise management of renewable natural resources in the watershed. Conservation Authorities undertake a broad range of programs, including: flood control, flood plain management, wetland protection, erosion control, reforestation, conservation lands and conservation education.

---

<sup>43</sup> Wikipedia

<sup>44</sup> Wikipedia

### **Lakehead University (LU)**

Post secondary institution located in Thunder Bay.

### **Ministry of Natural Resources (MNR)**

A Ministry within the Provincial Government of Ontario that manages and protects Ontario's natural resources for wise use across the province (including environmental, social and economic efforts) so that natural resources will be available for future generations.

### **Ministry of Northern Development and Mines (MNDM)**

The only regional Ministry within the government that plays a central role in Northern Affairs focusing on the delivery of front line services in the North.

### **Niche Segments**

Smaller market segments with a travel-motivating interest in a particular type of experience (i.e., a specific interest in good boardsailing opportunities vs. the mass market interest in a more generic sun and sand destination.

### **Non-Operating Provincial Park**

A Provincial Park whose services and facilities are minimal or not provided therefore fees are not normally charged.

### **North of Superior Marina Marketing Association (NSMMA)**

An association working in co-operation with other organizations to promote Northern Ontario as a world-class boat cruising destination.

### **North of Superior Snowmobile Association (NOSSA)**

An association that exists to promote and advertise safe, environmentally-friendly and organized snowmobiling in District 16 of the Ontario Federation of Snowmobile Clubs.

### **North of Superior Tourism Association (NOSTA)**

Non-profit association representing over 300 tourism businesses in the North of Superior region working to increase economic benefits accruing from tourism spending and to encourage increased tourism within the North of Superior region.

### **Northern Ontario Development Network (NODN)**

An economic development organization working with and supporting members and partners to develop and grow in Northwestern Ontario.

### **Northern Ontario Heritage Fund Corporation (NOHFC)**

A corporation under the Ministry of Northern Development and Mines that works with northern entrepreneurs and businesses to foster private sector job creation while supporting critical infrastructure and community development projects that build a foundation for future economic growth and enhanced quality of life.

### **Northern Ontario Municipal Association (NOMA)**

The Northwestern Ontario Municipal Association (NOMA) was organized in 1946 and incorporated in 2001 and is made up of four components. These are the Kenora District Municipal Association, the Rainy River District Municipal Association, the Thunder Bay District Municipal League and the City of Thunder Bay. Other than the City of Thunder Bay, membership is attained by being a member of the district organization. The Township of White River in the District of Algoma being a member of the Thunder Bay District Municipal League has membership into NOMA. The area represented extends from the City of Kenora on the west to the Township of White River on the east.

### **Northern Ontario Native Tourism Association (NONTA)**

A non-profit organization representing Aboriginal-owned and operated tourism operators and suppliers in Northern Ontario, working with its members to bring visitors the very best in Aboriginal tourism products, from eco-tourism, wilderness adventure and fishing to wildlife viewing and cultural/historical tours and assisting entrepreneurs in the development of new tourism initiatives.

### **Northwestern Ontario Associated Chambers of Commerce (NOACC)**

Represents a membership of regional Chambers of Commerce throughout Northwestern Ontario and is the active Voice of Business in Northwestern Ontario. NOACC provides leadership to ensure quality of life and a healthy economy for their member Chambers, the Regional Business Community and the Citizens of Northwestern Ontario. NOACC communicates with and lobbies government to ensure accountable and responsible actions which support regional goals.

### **Northwestern Ontario Regional Tourism Council (NWORTC)**

Initiated by the Northwestern Ontario Municipal Association, the Northwestern Ontario Common Voice Initiative led to the creation of several task forces and committees including the Northwestern Ontario Regional Tourism Council (NWORTC) whose mandate is "developing and fostering a Northwestern Ontario tourism strategy which addresses key issues, including planning, policy and product development".

The members of the NWORTC are:

- Sunset Country Tourism
- North of Superior Tourism Association (NOSTA)
- Northern Ontario Native Tourism Association (NONTA)
- Kenora District Camp Owners Association/Northwestern Ontario Tourism Association (KDCA/NWOTA)
- Patricia Region Tourist Council
- Tourism Thunder Bay
- Northern Ontario Tourist Outfitters Association operating as Nature & Outdoor Tourism Ontario (NOTO)

### **Ontario Federation of Snowmobile Clubs (OFSC)**

A non-profit, volunteer driven organization dedicated to providing strong leadership and support to member clubs and volunteers, to establish and maintain quality snowmobile trails (which are used in a safe and environmentally responsible manner) and to further the enjoyment of organized snowmobiling.

### **Ontario Ministry of Tourism (MTR)**

The Ministry of Tourism supports delivery of high quality tourism and recreation experiences to Ontarians and visitors to Ontario. It promotes a sustainable, customer-focused tourism industry and an active population to enhance residents' quality of life, increase pride in Ontario's communities and contribute to economic growth.

### **Ontario Tourism Marketing Partnership (OTMP)**

The partnership between the provincial government and the tourism industry responsible for marketing tourism in and to Ontario.

### **Ontario Motor Coach Association (OMCA)**

OMCA is the largest association of group and bus tour operators in Canada and the key industry association for that sector.

### **On-Theme Activities**

Activities that are related to the core attraction or the core experience. On-Theme activities can offer a different way of experiencing the core attraction, derive some of their attractiveness from their physical or logical relationship with the core attraction, or are themselves an intrinsic part of the core experience.

### **Operating Provincial Park**

A Provincial Park that has staff assigned to it and funding for providing services. Services vary depending on the park, but may include things like campground operations, trail and portage clearing, garbage collection and education programs. Most operating parks charge fees.

### **Product Positioning Statement**

A brief description of what a product or service does and its benefits using terms which set it apart from its competitors.

### **Receptive Tour Operator**

A travel operator who specializes in packaging travel to the market area in which it is situated, for sale generally to visitors from other geographic market areas; an important resource in understanding market perceptions, needs and opportunities in a destination area.

### **Regional Complex**

A group or cluster of individual tourism resources that when combined, complement one another to draw significant tourist visitation. When looked at individually, these resources would not be enough to attract visitation.

### **Strategic Tourism Development and Marketing Partnership for Northern Ontario**

The Strategic Tourism Development and Marketing Partnership for Northern Ontario is a unique partnership involving FedNor, the Ontario Ministry of Tourism through the Ontario Tourism Marketing Partnership Corporation (OTMPC), and the Ontario Ministry of Northern Development and Mines through the Northern Ontario Heritage Fund Corporation (NOHFC). It was created to focus on three key areas: Northern Ontario marketing campaigns, market development and training and education. Tourism stakeholders, who provide a direct link with industry, help to identify priority projects for collaboration.

### **Supporting Attraction**

Features or facilities that draw visitors to the destination area by giving additional but secondary reasons to travel there. Supporting attractions for mass markets may also be primary travel motivators or core attractions for niche market segments. They are generally distinguished from core attractions by their smaller number of visitors.

### **Survey Monkey**

An online database, with filtering capabilities, used to organize and analyze PRTD information collected.

### **Travel Agent**

An individual or firm licensed under the Travel Industry Act to offer travel advice and bookings. A travel agent can be an important resource in developing packaged travel opportunities in a destination.

### **Underdeveloped Assets**

Assets, which with further investment, could play a larger role in area tourism.

### **VFR**

Visiting friends and relatives – an important motivator for tourism travel. It also highlights the importance of marketing to local and regional residents.



*Premier Ranked*

