



Municipality of West Nipissing Tourism Attraction Study



West Nipissing Ovest

FedNor  Canada

 Ontario

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1 - INTRODUCTION



The Corporation of the Municipality of West Nipissing (herein referred to as the Municipality) retained Collins Barrow SNT, Markey Consulting and Karen Jones Consulting Inc. (the Project Team) to conduct a Tourism Attraction Study. The project included the development of a long-term plan to create a true tourism destination for Minnehaha Bay, the Sturgeon River Corridor and the Downtown district.

The long-term goal of this project is to increase tourism in the area, which consequently will create jobs and attract new investment. The plan will strengthen the downtown core and ensure success for the newly established waterfront park and municipal marina for years to come.

This report has been developed in collaboration with the Municipality, community leaders, stakeholders and local residents/businesses. The final product will provide the community with a road map for the future direction to attract tourists and new investment to the area.

The Project Team adhered to the following project objectives:

- Source and present relevant local and regional data, information, statistics and assets to help position the area for visitation and investment;
- Identify opportunities for the development of new products, and the enhancement of existing products over the short and long term;
- Identify existing resources and assets, and advantages to visiting the region; and
- Identify key influencing factors for the attraction of new visitors.

In order to meet the outlined objectives, the Project Team conducted a situational analysis of the region. This included primary research consisting of direct stakeholder engagement with:

- Municipality representatives;
- Key stakeholders;
- Tourism operators/businesses;
- Key SMEs in a variety of other sectors; and
- West Nipissing residents.

Secondary research consisted of the following sources:

- A review of existing data, reports, studies and documents from the Municipality, region and province.
- Market research including a review of best practices to establish a baseline of successful initiatives, programs and tactics that have been implemented by other jurisdictions.

Please refer to Appendix A for a list of the documents reviewed.

Following the research process, an analysis and summation of the data collected was conducted. Stakeholder consultations were relied upon to acquire input on opportunities and recommendations.

1.1 REPORT CONTENT

The **Attraction Study** consists of a compilation of stakeholder feedback and research and provides the background analysis, evidence and rationale for each of the recommendations outlined in the Long Term Action Plan. The Study provides a summary of the findings associated with the following deliverables:

- Summary of key baseline research findings;
- Results stemming from stakeholder engagement;
- Needs and gap analysis; and
- Review of best practices.

The **Long Term Action-Plan** is presented in the form of an interactive tool to help guide the community through the development and implementation process. The purpose of the action-oriented approach is to ensure that the Municipality and its stakeholders have a user-friendly, practical document to support the implementation of the recommendations.

Both resources are intended to be aids in seamlessly guiding West Nipissing through the first steps in the development of a tourism destination.

The Communication Plan is included in the Long-Term Action Plan. The Communication Plan will provide the Municipality with clear target audiences, tactics and communication objectives for each activity.

1.2 ACKNOWLEDGEMENTS

The work of the Project Team was enhanced by the participation of the Tourism Development Project Advisory Committee made up of industry representatives with skills, knowledge and expertise relative to their respective group. The insight and contribution provided by the members of each committee has been instrumental to the overall process.

The contributions made by the members of the Municipality, its staff, survey respondents and stakeholders who agreed to be interviewed, provided great value to the development of this plan. While assembled by the Project Team, the following document is a true reflection of the wide-ranging and insightful ideas of numerous individuals and groups who are actively engaged in the various facets of tourism and economic development.

1.3 OVERVIEW

La Joie de vivre in West Nipissing where you will spend your life enjoying every day.

Founded in 1999 through the amalgamation of Cache Bay, Crystal Falls, Desaulniers, Field, Kipling, Lavigne, North Monetville, River Valley, Sturgeon Falls, Verner and 17 ½ unincorporated townships, the Municipality of West Nipissing is a vibrant municipality located in Northeastern Ontario.

West Nipissing had the highest population growth in the Nipissing District since the 2006 census.

With a population of 14,149, based on the 2011 census and a landmass of 1,992 square kilometers, the Municipality benefits from being within close proximity of Sudbury to the West and North Bay to the east. While Northern Ontario as a whole experienced a population decline of 1.4% since the 2006 census, West Nipissing has seen an increase of 5.5%, placing it among the minority of growing communities in the North.



Population change - Nipissing District (# of people since 2006 census)

West Nipissing	739
East Ferris	81
Nipissing North	55
Nipissing 10	37
Bonfield	35
Mattawa	20
Mattawan	15
Nipissing South	13
Calvin	-40
South Algonquin	-42
Chisolm	-55
Papineau Cameron	-80
Temagami	-114
North Bay	-315
Nipissing District	349

West Nipissing is the most bilingual community in Ontario, with 68.3% of its residents fluent in both English and French¹. **This strength creates a strategic marketing and product development opportunity for the Municipality.** The history and culture of the communities that comprise the municipality are seen to be fundamental to its future development. The Municipality is rich in its multi-cultural character, its francophone heritage, Aboriginal roots and in the diversity of its rural and small urban landscapes.

The Municipality and residents of West Nipissing embody *Joie de vivre*, which is about living life to its fullest. In the literal sense it means the joy of living, but it is so much more. In West Nipissing, la Joie de vivre recognizes that each moment is a gift, values the significance of sharing time in the company of others, the importance of making every meeting a special occasion and rewarding with a rich sense of belonging.

1.4 DEFINING TOURISM

It is important when undertaking a project of this scale to ensure that all those involved have a clear and broadly accepted understanding of the definition of tourism. A definition is a statement which captures the meaning, the use, the function and the essence of a term or a concept. Definitions allow us to better assess situations, have more meaningful conversations and make better decisions. In contrast, imprecise definitions make it difficult to even agree on what we are talking about.

For the purpose of this Study, the Project Team has endeavoured to base all discussions, consultations and planning on the definition of tourism used by the National Tourism Indicators (NTI) which is that adopted by the World Tourism Organization and the United Nations Statistical Commission:

“The activities of persons traveling to and staying in places outside their usual environment for not more than one consecutive year for leisure, business and other purposes.” According to the Ministry of Tourism, Culture and Sport, in Canada,

for a domestic trip to be part of tourism it has to be an “out-of-town” trip and, in addition, for same day trips it has to be 40 kilometers one-way from the traveler’s home.

¹Municipality of West Nipissing Community and Business Profile, 2015



2 - PROJECT METHODOLOGY

2.1 RESEARCH

The Project Team conducted both primary and secondary research, placing a significant emphasis on surveys and stakeholder engagement.

Primary research was conducted to help in developing a deeper understanding of the current tourism situation in West Nipissing, as well as gather ideas for potential tourism opportunities foreseen by the Municipality's stakeholders. Primary research included:

- Destination Next Online Assessment with members of the tourism advisory committee.
- Web-based surveys accessible to members of the community and local businesses.
- Stakeholder focus groups and discussions.
- Consultations with a tourism development advisory committee made up of economic development partners, local business owners, municipal staff and community residents

Secondary research included a desktop review of the existing data, research and analysis with particular attention to recommendations and relevant opportunities for future implementation. It also included an analysis of the current labour market situation to determine the true impact of tourism as it relates to employment for the community.

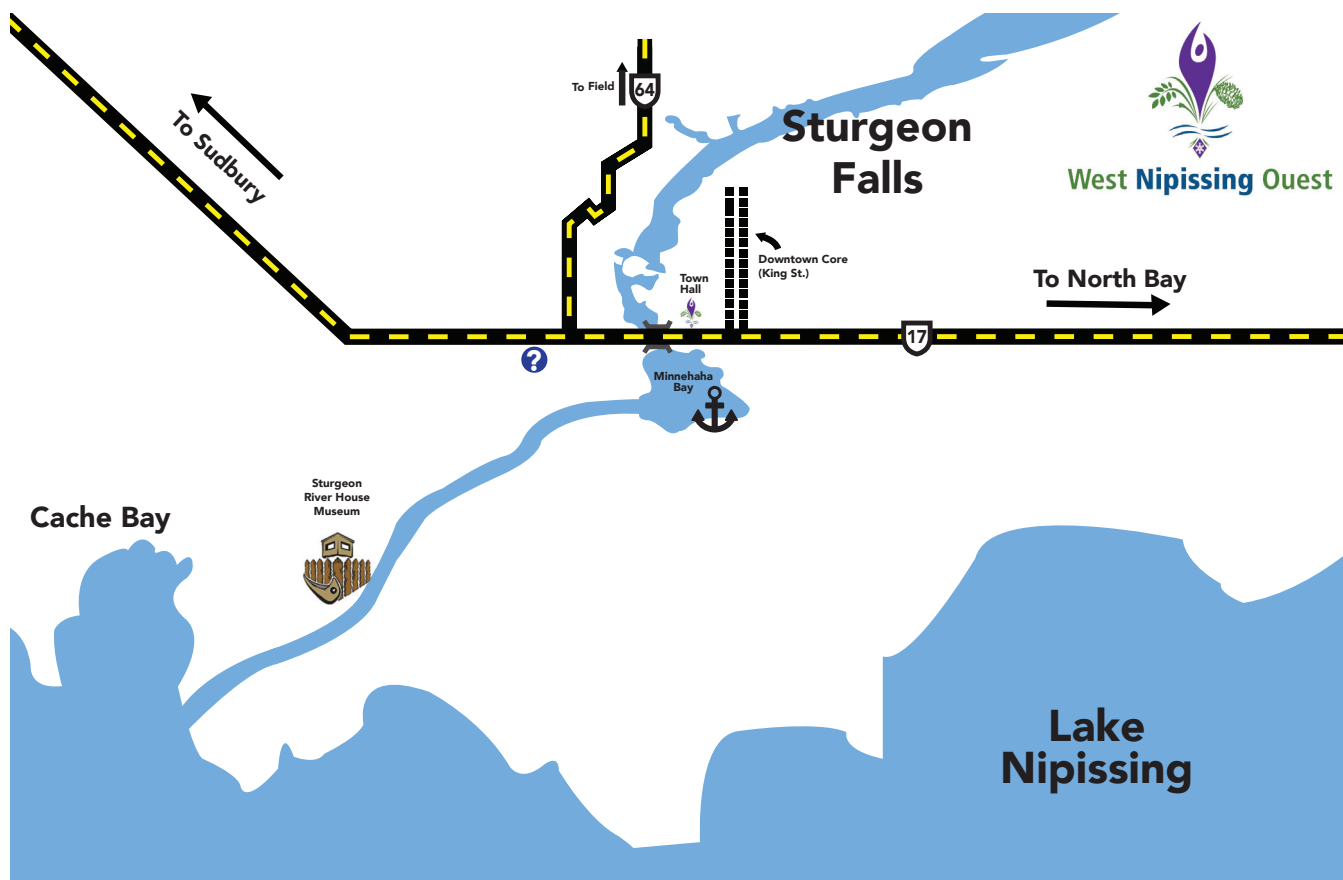
Best practices research was also conducted in order to ascertain critical success factors required to achieve each of the goals outlined in the Long-Term Action Plan. A "Best Practice" is commonly defined as "a technique or methodology that, through experience and research, has proven reliably to lead to a desired result." In the context of community development, a practical definition of a "Best Practice" is knowledge about what works in specific situations and jurisdictions, without using inordinate resources to achieve the desired results, and which can be used to develop and implement initiatives and solutions at the local level.

In addition, a sampling of successful initiatives, programs and tactics were also identified and have been showcased in the form of Case Studies as examples of other jurisdictions that have been successful in their implementation.

2.2 DATA ANALYSIS

All data and information collected through the research phase was analyzed and summarized, leading to the identification of a series of goals and recommendations for Minnehaha Bay, the Sturgeon River Corridor and the Downtown. The following map provides a visual illustration of the project's three core areas. The map is not to scale.

Based on the research findings, assets were highlighted and gaps in available infrastructure and services were acknowledged. This process led to the identification of goals and recommended approaches to fill said gaps. The analysis was broken down into three main categories, which included overarching situational analysis, needs and gap analysis and SWOT analysis.



2.3 RECOMMENDATIONS

The findings from the analysis were then used to develop recommendations for the Long-Term Action Plan. For each of the recommendations the Project Team identified potential actions items, recommended project partners, the impacted geographic area/asset, the rationale and whether it fits within a short, medium or long-term implementation time frame.

2.4 COMMUNICATIONS PLAN

The final step in completing the Long-Term Action Plan was the development of a communications strategy. This component of the Plan focuses on approaches, tools and tactics for promoting existing assets and future developments.



3 - SITUATION ANALYSIS

A situation analysis is a synopsis and evaluation of an organization, business, community or region's current situation, opportunities and challenges. Undertaking such an analysis was key to understanding the trends, forces, and conditions that currently influence and shape West Nipissing's tourism sector. Following the collection and compilation of relevant sector data, the Project Team reviewed and analyzed the information and identified strengths, weaknesses, assets, gaps, and opportunities that exist within the Municipality's landscape. The information obtained from the situational analysis provided the foundation for the creation of the comprehensive and collaborative long term action plan identifying tangible, strategic initiatives for implementation.

3.1 SECONDARY RESEARCH

Secondary research consists of collecting and analyzing data that has already been produced. For the purposes of this project, the process included sourcing and reviewing local, regional, provincial, national and international data, studies, strategies, research papers and other documents related to tourism and community development. A complete list of documents and data reviewed as part of this process can be found in Appendix A.

The information collection through the Secondary Research process provided a clearer picture of the current status of West Nipissing's tourism industry and community as a whole. A synopsis of the findings has been summarized below.

IMPORTANCE OF TOURISM

As one of the worlds' largest industries, tourism contributes significantly to local, regional and national economies.

To understand this economic contribution it is effective to recognize the incremental impact that one tourism dollar would have on the West Nipissing economy. The multiplier effect is the compounding result of one tourism dollar, which occurs when a tourist spends money. To illustrate this concept,

a West Nipissing tourist dines at a restaurant downtown Sturgeon Falls. The restaurant owner then spends that money at the grocery store to buy food for the restaurant and elsewhere and the money is continuously circulated within the community.

Due to the tourism sector's multi-faceted nature, exact dollar figures of contributions to the economy are difficult to measure. Tourism consists of several mutually exclusive sectors such as accommodation, transportation, food and beverage, attractions, events and tourism services. The difficulty in quantifying tourism's impact on a community comes from the fact that many of these services are used not only by tourists, but local residents as well.

CURRENT TOURISM LANDSCAPE

There are a number of primary organizations involved in tourism, each plays an important role within the ecosystem.

ORGANIZATION	OVERVIEW / ROLE
Canadian Tourism Commission (CTC)	A Crown corporation, the CTC is mandated to sustain a vibrant and profitable Canadian tourism industry and market Canada as a desirable tourism destination. The CTC works to stimulate international visitation and its goal is to grow tourism export revenues.
Ministry of Tourism, Culture and Sport (MTCS)	MTCS works closely with the tourism sector to help stimulate economic growth and investment and create an environment that allows Ontario to compete successfully in the rapidly changing world of travel and leisure.
Ontario Tourism Marketing Partnership Corporation (OTMPC)	The Ontario Tourism Marketing Partnership Corporation (OTMPC) was established in 1998. Its vision is to inspire consumers to discover Ontario and its mission is to grow Ontario's tourism sector year round by stimulating increased consumer spending and visits and by generating greater partnership participation.
OTMPC Northern Office	A dedicated staff team at OTMPC Northern Office works closely with OTMPC and partner tourism organizations in Northern Ontario to deliver a variety of marketing programs. The Office also works with the Northern Committee, a committee of OTMPC.
Nature & Outdoor Tourism Ontario (NOTO)	NOTO works to enhance to enhance the quality, diversity and economic viability of the nature and outdoor tourism industry in Ontario.
Tourism Northern Ontario (TNO / RTO 13)	One of the 13 "RTOs" or Regional Tourism Organizations in Ontario established by the Province as a result of the 2009 Discovering Ontario Report led by Greg Sobara. TNO is mandated to support and develop programs related to four key pillars which include product development, investment attraction, workforce development/capacity building and marketing for Northern Ontario.
Northeastern Ontario Tourism (NEONT / RTO 13a)	A not for profit which receives significant budget allocations from RTO 13 for the purposes of implementing programs at a sub-regional level. NEONT staff and board members work together, representing the whole of the sub-region in terms of destinations, sectors, and different marketing priorities (products, markets).
Sector Organizations	Organizations that have a pan-Northern mandate, represent a significant number of Northern Ontario products, and with some mandate involving marketing, include NOTO and Ontario Parks.
Destination Marketing Organizations (DMO) and Associations	Organizations that promote a town, city, region, or country in order to increase the number of visitors.
Cities and Towns	Develop and implement initiatives aimed at building and promoting tourism product and services at the local level.
Operators / Businesses/ Attractions	Private and public sector tourism product and service providers

LEVERAGING OPPORTUNITIES

While Northeastern Ontario Tourism (NEONT) is mandated through their Tourism Partnership Agreement (TPA) with Tourism Northern Ontario (TNO) to utilize a portion of the funds on implementing a regional marketing plan, there are additional dollars available to their partners for the development and implementation of projects relating to the other three tourism pillars; namely product development, capacity building and investment attraction.

To date, West Nipissing has not become a NEONT partner and has therefore been unable to take advantage of multiple opportunities to access funding.

Below is a representation of how dollars flow from the province to Northern Ontario and to Northeastern Ontario. This is followed by a listing of the various types of opportunities that could be leveraged at the local level.

MTCS	
\$47.4 M (2012)	\$5.7 M
OTMP	TNO (RTO13)
\$6M	\$1M
OTMP Northern Office	NEONT (13A)



LOCAL PARTNERSHIPS

- Media Familiarization Tours (FAM)
- Inclusion in promotional guides
- Ability to bid on events
- Representation at various trade shows and events
- Inclusion in television advertising
- Feature stories on Northern Portal
- Partnership programs for product development; investment attraction and capacity building
- Tourism Excellence North (TEN) Program

To date, the Municipality of West Nipissing has not partnered with other tourism organizations and as a result has missed a huge opportunity to leverage dollars, programs and people.

The Province provides upwards of \$12 M dollars annually to TNO and the Ontario Tourism Marketing Partnership Corporation (OTMPC) Northern Office for the development of tourism related initiatives. As depicted through the image above, a significant portion of this is specifically earmarked for development in the Northeast through NEONT.

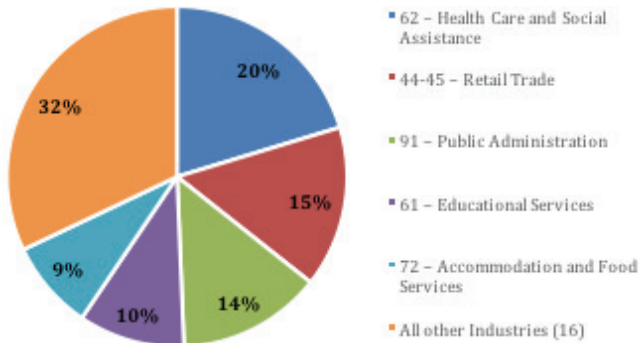
TOURISM EMPLOYMENT

Tourism is a significant industry in Canada, Ontario and more specifically Northeastern Ontario, accounting for thousands of jobs annually. According to the Regional Tourism Workforce & Training Strategy prepared by Miller Dickinson Blais, tourism-related occupations account for 40% of the total labour force in Northern Ontario.

In West Nipissing, upwards of 800 jobs fall within the North American Industry Classification System (NAICS) categories for retail trade, accommodations and food services. Accommodations and food services are directly tied to the tourism sector.

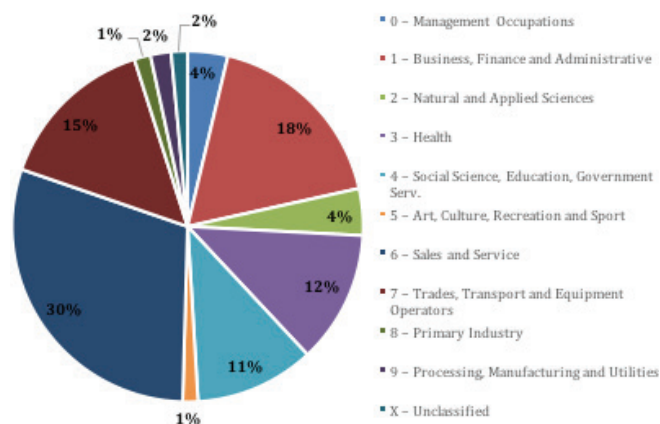
NAICS Job Data by Major Industry (Top 5)

NAICS	2015 Jobs	%
62 – Health Care and Social Assistance	735	20.3%
44-45 – Retail Trade	555	15.3%
91 – Public Administration	497	13.7%
61 – Educational Services	366	10.1%
72 – Accommodation and Food Services	308	8.5%
All other Industries (16)	1,158	32.0%
TOTALS	3,619	100.0%



Further, Sales and Service occupations make up almost one-third of all jobs in the municipality.

NOC*	2015 Jobs	%
6 – Sales and Service	1,078	29.8%
1 – Business, Finance and Administrative	644	17.8%
7 – Trades, Transport and Equipment Operators	534	14.8%
3 – Health	444	12.2%
4 – Social Science, Education, Government Services	397	11.0%
2 – Natural and Applied Sciences	157	4.3%
0 – Management Occupations	135	3.7%
9 – Processing, Manufacturing and Utilities	70	1.9%
8 – Primary Industry	55	1.5%
X – Unclassified	53	1.5%
5 – Art, Culture, Recreation and Sport	51	1.4%
TOTALS	3,619	100.0%



West Nipissing relies on the tourism sector in a variety of capacities including the growth and sustainability of its economy. Not only does the sector have a positive impact in terms of direct employment, but it also supports other industries through the provision of services such as accommodations.

TOURISM ACTIVITY

The size and shape of the tourism sector is related to the nature of tourism in a local area. This includes how many tourists visit, when they come, what they do and where they stay. This section will describe the profile of tourism activity in the districts which impact visitation to West Nipissing. Although this data reflects regional level activity, it is important to the development of West Nipissing's Long Term Plan as it provides insight into the community's current and potential market as well as visitation trends.

Total Number Of Tourist Visits

The first relevant statistic is the number of tourist-visits to the area.

Statistics Canada conducts a detailed survey of tourism across Canada. As it is a survey, it represents a sample of tourists with smaller geographic areas. To compensate for the relatively small sample, it is useful to show the data over multiple years to illustrate possible trends. It is often helpful to average out the responses over several years to reduce the margin of error. In addition, some of the questions were changed between 2010 and 2011, which may have affected the ability to compare data before and after 2010. As a result, the available data will often be illustrated showing two timeframes: 2006-2010, and 2011 which is the most recent date for which data is available.

The following table provides the survey estimates for the number of tourist visits to each district for 2006 to 2011.

Annual number of person-visits, Nipissing, Sudbury District, Greater Sudbury, Timiskaming, 2006-2011

	2006	2007	2008	2009	2010	2011
Nipissing	1,323,530	1,145,260	1,112,431	1,270,006	1,226,557	1,299,983
Sudbury District	1,150,631	1,140,592	875,385	975,797	1,067,507	1,281,666
Greater Sudbury	364,906	364,217	343,371	392,693	412,192	358,641
Timiskaming	240,361	216,653	170,072	176,156	210,766	328,158

Seasonality of person-visits

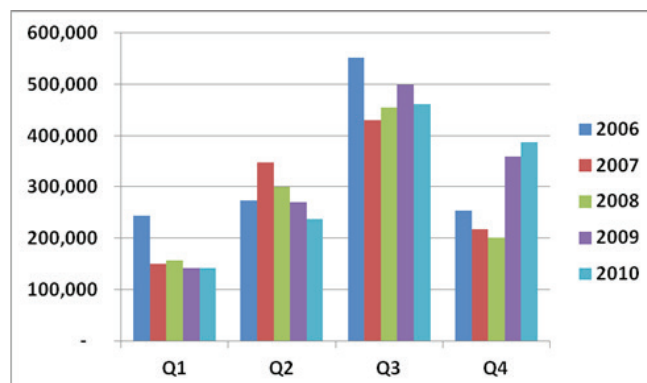
The level of tourism activity is often related to the seasons, with some regions attracting visitors during the summer while others are prominent winter destinations. The following charts illustrate the data for each quarter from 2006 through 2010, to visualize not only the highs and lows by season, but also the variability between years (some of that variability may be due to the smaller survey sample sizes). Due to the different number of visitors, the scale on the left-hand side of the charts varies, so the absolute amounts cannot be compared by the length of the bar from chart to chart.

The quarters are defined as follows:

Q1	First quarter	January, February, March
Q2	Second quarter	April, May, June
Q3	Third quarter	July, August, September
Q4	Fourth quarter	October, November, December

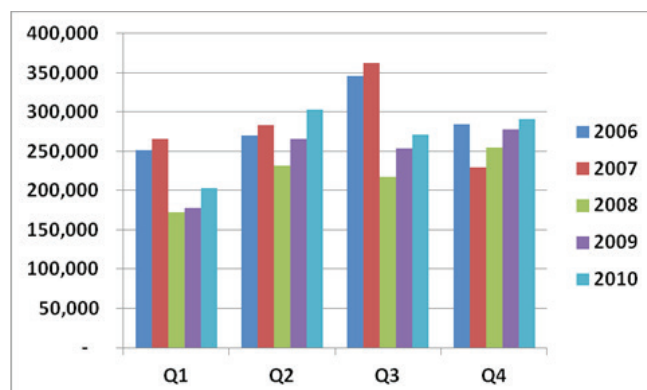
Seasonality of person-visits, Nipissing

2006-2010



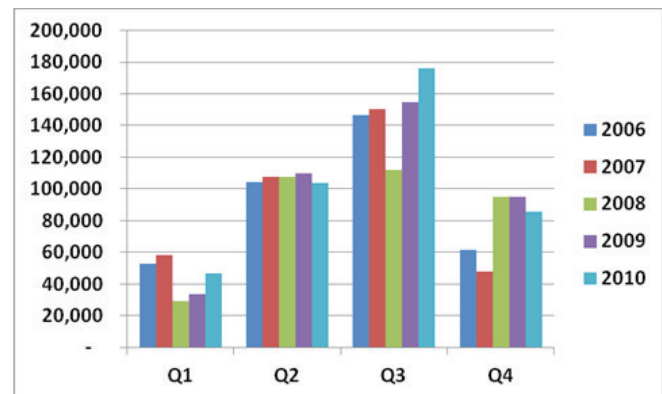
Seasonality of person-visits, Sudbury District,

2006-2010



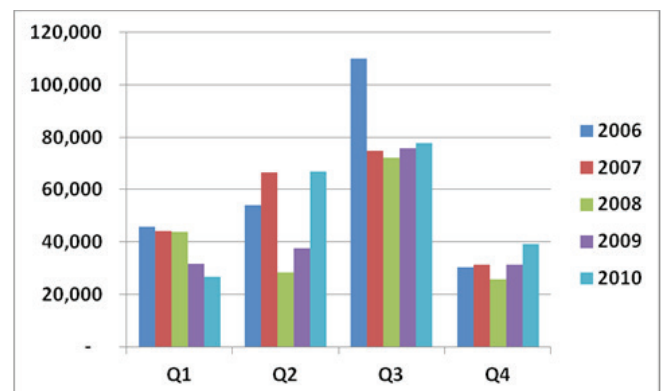
Seasonality of person-visits, Greater Sudbury

2006-2010



Seasonality of person-visits, Timiskaming

2006-2010



This variance by season in the number of person-visits has a great impact on the provision of services to visitors, and consequently on the seasonality of employment in tourism-related occupations.

Origin and Purpose Of Visits

The following table identifies the origin of where visitors come from and the purpose of their trip for each of the four districts.

Origins of visits, number and percentage of total, Nipissing, Sudbury District, Greater Sudbury and Timiskaming average for 2006-2010							
NIPISSING			TOP FIVE ORIGINS OF VISITS FOR NIPISSING				
	Canada	Ontario	Nipissing	Sudbury District	Toronto	York	Cochrane
Number	1,138,121	1,072,413	210,798	128,905	62,315	60,332	53,743
Percent	94%	88%	17%	11%	5%	5%	4%
SUDBURY DISTRICT			TOP FIVE ORIGINS OF VISITS FOR SUDBURY DISTRICT				
	Canada	Ontario	Nipissing	Greater Sudbury	Sudbury District	Cochrane	Manitoulin
Number	989,733	957,726	125,408	121,151	110,934	88,780	87,042
Percent	95%	92%	12%	12%	11%	9%	8%
GREATER SUDBURY			TOP FIVE ORIGINS OF VISITS FOR GREATER SUDBURY				
	Canada	Ontario	Sudbury District	Cochrane	Algoma	Manitoulin	Nipissing
Number	345,661	341,015	162,410	50,454	19,237	19,013	12,264
Percent	92%	91%	43%	13%	5%	5%	3%
TIMISKAMING			TOP FIVE ORIGINS OF VISITS FOR TIMISKAMING				
	Canada	Ontario	Cochrane	Nipissing	Sudbury District	Timiskaming	Toronto
Number	177,131	164,936	46,491	22,103	16,621	10,529	6,719
Percent	87%	81%	23%	11%	8%	5%	3%

In most instances, the surrounding area is the largest source for person-visits to any given district. In a few instances, the top five origins of visitors come from the Greater Toronto Area.

- Nipissing, 10% of visitors come from either Toronto or York Region
- Timiskaming 3% come from Toronto.

Overall, close to 90% of visitors come from Ontario, and the majority of the rest come from other parts of Canada. Most foreign tourists come from the United States. The average proportion of American among all person-visits is:

- Nipissing: 4.2%
- Sudbury District: 4.1%
- Greater Sudbury: 7.5%
- Timiskaming: 11.6%

The travel survey also asks respondents about the purpose of their visit. The change in the survey between 2010 and 2011 resulted in several new answer categories. The tables below provide the percentage responses averaged for 2006 to 2010 and for 2011.

There are some notable differences between the figures for 2006-2010 and for 2011. Two possible reasons may account for this:

1. Changes in the wording and format of the survey may have resulted in somewhat different answers.
2. The 2011 figures represent only one year and so there is no smoothing out of possible variations by averaging several years of responses.

	NIPISSING		SUDBURY DISTRICT		GREATER SUDBURY		TIMISKAMING	
	2006/2010	2011	2006/2010	2011	2006/2010	2011	2006/2010	2011
PERSONAL	96%	96%	98%	93%	98%	93%	94%	96%
Pleasure	54%	44%	62%	49%	62%	49%	46%	22%
Friends/relatives	36%	45%	32%	36%	32%	36%	41%	58%
Shopping		3%		5%		5%		4%
Conventions		1%		2%		2%		4%
Other personal	6%	4%	4%	1%	4%	1%	7%	8%
BUSINESS	4%	4%	3%	8%	3%	8%	6%	4%
Meetings	0%	0%	0%	0%	0%	0%	0%	0%
Conventions	2%	3%	1%	1%	1%	1%	2%	4%
Other business	3%	1%	2%	7%	2%	7%	4%	0%

The data suggests a number of observations:

- In all areas profiled, personal reasons are the purpose of the vast majority of visits. The comparable data for Ontario as a whole for 2011 indicates that 89% of visits are for pleasure and 11% for business.
- Greater Sudbury in particular has a somewhat higher proportion of visits for personal reasons than elsewhere, and this area also has a higher proportion of personal visits for pleasure, as opposed to visiting friends or relatives. Sudbury District also experiences more visits for the purpose of shopping.

There appears to be more instances of discontinuity in the data on business visits, comparing 2006-2010 and 2011. Nevertheless, the pattern appears to be that Greater Sudbury/District experiences more visits for business than the other areas.

Visitor Activities

The tourist data provides figures for what activities visitors are engaged in. Once again, given the smaller sample sizes, the average figure for several years has been provided. The span 2007 to 2011 includes the responses to the revised survey, as this question had not changed. There does appear to be a discrepancy in the data for 2006, therefore this year has been dropped from the analysis.

In addition, the number of responses compared to the total number of visits varies considerably. This figure is reported as the response rate. The fact is, visitors may identify more than one activity, so that the term "response rate" is not exactly accurate, but the calculation does indicate the degree to which activities are either engaged in or reported on. The percentage figure is a percentage of all person-visits, not a percentage of all those reporting an activity.

	NIPISSING	SUDBURY DISTRICT	GREATER SUDBURY	TIMISKAMING
RESPONSE RATE	85%	47%	74%	62%
Festivals/Fairs	2%	2%	1%	3%
Cultural Performances	3%	4%	2%	2%
Museums/Art Galleries	8%	5%	5%	6%
Zoos/Aquariums/Botanical Gardens	1%	1%	1%	0%
Sports Events	2%	4%	2%	5%
Casinos	1%	3%	1%	1%
Theme Parks	2%	1%	1%	0%
National/Provincial Nature Parks	17%	4%	10%	5%
Historic Sites	7%	4%	4%	5%
Any Outdoor/Sports Activity	43%	19%	47%	34%
Boating	22%	6%	27%	13%
Golfing	2%	1%	5%	1%
Fishing	17%	7%	30%	19%
Hunting	1%	1%	3%	2%
Downhill skiing/ Snowboarding	2%	1%	2%	5%

Certainly in every instance, outdoor activities account for the largest proportion of activities, except in the case of Sudbury District. Nipissing reports a high proportion of activities, suggesting multiple activities on the part of visitors. As well, even with the high degree of outdoor activity, Nipissing also has high proportions of visitors engaged in visiting historic sites and museums/art galleries.

Visitor Accommodations

Accommodations are used by visitors who stay one night or longer. The first relevant piece of data is to know what proportion of visitors stay overnight and how long they stay. There is incongruent data between the 2006-10 figures and the 2011 survey results, and so both will be presented.

Percentage of all visits that stay overnight and average nights of overnight visits, Nipissing, Sudbury District, Greater Sudbury, Timiskaming and Ontario, average of 2006-2010, and 2011				
	Percent of visits that are overnight		Average nights of overnight visits	
	2006-10	2011	2006-10	2011
Nipissing	61%	60%	3.3	2.6
Sudbury District	60%	50%	2.8	2.9
Greater Sudbury	52%	53%	3.6	3.8
Timiskaming	71%	72%	3.2	3.0
Ontario	42%	35%	3.1	2.9

Compared to the Ontario average, there is a considerably higher proportion of person-visits that overnight in these areas. Timiskaming in particular has a very high proportion of overnight visitors.

Those visitors who stay overnight also stay slightly longer than the figure for the Ontario average, with Sudbury District figures coming in at the low end.

In most cases, the variations between the 2006-10 and 2011 figures are not so great, but enough to consider that with variations due to sampling, the 2006-10 numbers might be more accurate only because they represent the average of five years, and would smooth out sampling variations.

The data for the kind of accommodations are used will also be presented for 2006-10 and 2011 separately.

	NIPISSING		GREATER SUDBURY		SUDBURY DISTRICT		TIMISKAMING	
	2006-2010	2011	2006-2010	2011	2006-2010	2011	2006-2010	2011
Hotels	8%	11%	15%	13%	2%	4%	8%	21%
Motels	3%	3%	5%	4%	3%	0%	13%	3%
Commercial cottage/cabins	13%	5%	1%	0%	12%	12%	6%	8%
Camping/RV facilities	20%	24%	4%	5%	12%	11%	6%	2%
Private homes	28%	36%	60%	66%	26%	25%	45%	50%
Private cottages	20%	18%	9%	6%	37%	40%	14%	13%

There are significant differences between the choices of accommodations among overnight visitors among the different areas.

- Greater Sudbury and Timiskaming have approximately half of their overnight visits staying in private homes, while for Nipissing and Sudbury District, that figure hovers around a quarter.
- Sudbury District and Nipissing have slightly higher proportions of overnight visitors staying in private cottages.
- Nipissing has a higher proportions of overnight visits using camping or RV facilities. Commercial cottages are also prominent in Sudbury District and Nipissing.
- Greater Sudbury, Nipissing and Timiskaming experience higher use of hotels. It is harder to draw conclusions about the reliance on motels, given the discrepancy in the figures between 2006-2010 and 2011 for Timiskaming.

Comparing the actual number of overnight stays by accommodation type gives a sense of the scale of these different accommodation sectors, given the variations in the total number of overnight stays by area. Only one time period will be displayed, the data for 2011.

KEY INFLUENCING FACTORS

In order to be successful at attracting visitors to a given area, destinations need to understand travel behavioral trends and influential factors. This impacts the ability to successfully implement strategies.

In order to gain a better understanding of said influential factors, Destination Marketing Association International (DMAI) took a broad look at the industry, polling over 300 of the tourism industry's top executives from different travel sectors and senior leaders in non-travel related fields of business, economics, technology and social sciences. Identified below are the top resulting influential trends which have a direct impact on West Nipissing.

1. **Social media's** prominence in reaching the travel market (e.g. Facebook; Pinterest; Twitter etc.) with mobile platforms and apps becoming the primary engagement platform for travelers.
2. Customers increasingly seeking a personalized travel experience (e.g. **experiential tourism**).
3. Travelers demanding more **information**, control, interaction and personalization.
4. **Brand identity** for destinations becoming more critical in terms of meeting visitor perceptions about value and experience.
5. Customers increasingly looking for a travel experience that allows them to experience a local's way of life and **culture**.

SUMMARY OF SECONDARY RESEARCH

KEY FINDINGS	OPPORTUNITY FOR WEST NIPISSING
For a domestic trip to be part of tourism it has to be an "out-of-town" trip and, in addition, for same day trips it has to be 40 kilometers one-way from the traveler's home.	Capitalize on the regional markets of North Bay, Sudbury and Temiskaming Shores.
Millions of dollars are allocated annually to tourism in Northern Ontario providing opportunity to leverage programs and funds for local development.	Become a member of NEONT to ensure representation at the Provincial level and to take advantage of leveraging and capitalizing on opportunities for funding, HR and programs.
2 in 5 visitors to Northeastern Ontario are VFR (visiting friends and relatives).	Significant opportunity to target regional VFR for same day trips.
Upwards of 800 jobs in West Nipissing can be tied to tourism.	Opportunity to train unemployed and underemployed people for careers in the tourism sector.
Nipissing has the highest number of person-visits per year, followed closely by Sudbury District (each has around 1.3 million).	Capitalize on visitors while in the area to attract them to West Nipissing through regional packaging, touring opportunities, etc.
In most instances, the surrounding area is the largest source for person-visits to any given district.	Regional travel and day trip opportunities.
In all areas profiled, personal reasons are the purpose of the vast majority of visits. Sudbury District experiences more visits for business than the other areas. <ul style="list-style-type: none"> 2011 Sudbury - 13% 2011 Ontario - 11% 	Initial focus for West Nipissing should be leisure travelers.
In every area, outdoor activities account for the largest proportion of visitor activities, except in the case of Sudbury District.	Numerous outdoor opportunities in West Nipissing exist. This needs to be packaged and commercialized.
Compared to the Ontario average, there is a considerably higher proportion of person-visits than overnight in these areas. Temiskaming in particular has a very high proportion of overnight visitors. Those visitors who stay overnight also stay slightly longer than the Ontario average.	Providing additional activities and experiences will entice individuals who are already prepared to do overnights to stay in the region longer.
Social media, mobile apps and technology play a primary role in the consumer decision making and purchasing process.	Opportunity to promote West Nipissing by using local champions to "sell" or "promote" the community and its assets.
Customers increasingly seeking a personalized travel experience that allows them to experience a 'local' way of life.	Experiential tourism encourages visitors to participate and promotes activities that draw people into cultures, communities and the outdoors which provides an opportunity to build on local culture and develop experiential travel opportunities at the grass roots level.
Brand identity for destinations becoming more critical.	Building on already successful Joie de vivre brand.

3.2 PRIMARY RESEARCH

Primary research involves collecting data directly from first-hand experience and observations. For the purpose of this project, the focus of the community consultation and stakeholder engagement process was placed on the following key groups:

- Municipal staff
- Local businesses and organizations
- Area residents (current and past)
- Young professionals and students

A variety of engagement methods were utilized in order to gain as much input into the process as possible. This includes the following steps:

Step 1: Online assessment

Step 2: Survey questionnaires

Step 3: Focus group sessions & interviews

The information gleaned through the primary research phase provided information on both perceived/real assets and gaps within West Nipissing's tourism sector. It also enabled the Project Team and Municipal staff to communicate information about the project and future tourism plans to individuals and groups that have a role to play in the industry. Please refer to Appendix B for a copy of the survey and the results generated.

The stakeholder engagement process provided the following value and benefit:

- Education and increased awareness about tourism, the Municipality's role and the Tourism Attraction Study & Long-Term Action Plan.
- Set the stage for future engagement with organizations and businesses that may be able to play a role in implementing the plan.
- Built on the information provided in the online survey.
- Acquired input from various perspectives regarding the industry, the Municipality and the Long Term Action Plan.
- Acquired knowledge and intelligence regarding existing initiatives.

- Grow the Municipality's communication database.
- Initiation of partnership development process and identification of roles.
- Identification of industry champions.
- Identification of stakeholders, roles and mandates.
- Assist in the development of the SWOT Analysis.
- Assist in identifying gaps.
- Offer feedback on project direction and recommendations;
- Review of best practices in other sectors and jurisdictions; and
- Grow and strengthen the network.

An explanation is provided for the methodology of each engagement activity, followed by a summary of emergent themes and observations, which have been consolidated into the SWOT and Gap Analysis. Please refer to Appendix C for a copy of the presentation used during the focus group sessions.

DESTINATION NEXT ONLINE ASSESSMENT

Destination NEXT consists of an actionable online diagnostic self-assessment tool for individual DMOs and destination stakeholders to discern how well their destination is leveraging all of the elements that go into attracting leisure and business travelers.

The online diagnostic tool is built upon two key inputs:

1. Assessment of how important each variable is to the destination.
2. Assessment of the destination's perceived performance across each variable.

This is accomplished by measuring responses to a series of questions related to **destination strength** and **community support and engagement**.

Destination strength encompasses the destination's infrastructure and reputation, including the level of service, attractions, events, hotels, transportation networks, communication systems, and the overall power and reach of the brand.

The community support and engagement evaluation examines political support, regional support and community understanding of tourism impact. This is measured by variables including the level and consistency of funding, partnerships, community engagement, cooperation with local/regional government, economic development, and a well-established governance model.

The intersection of these two major independent factors generates four dramatically different scenarios as per those identified in the graphic below.



Once the assessment has been completed by all participants, a diagnostic report card plotting the results is produced. This report outlines the results for each variable, and how the destination compares to the industry average. In the case of West Nipissing, the self-assessment was undertaken by the 10 members of the project's Tourism Advisory Committee.

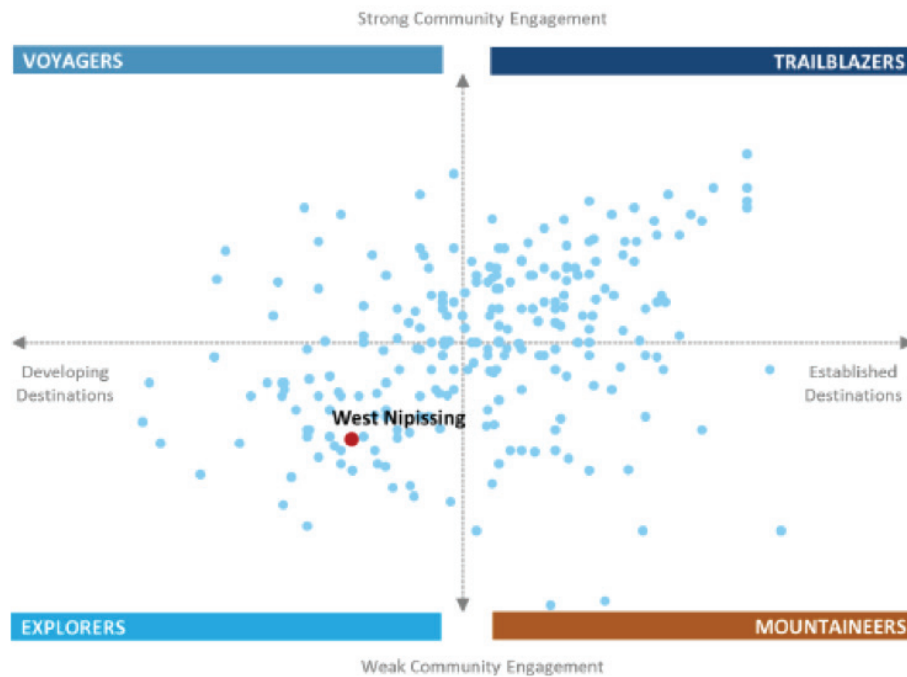
West Nipissing's Destination NEXT Outcomes

The resulting diagnostic report for West Nipissing's Destination NEXT self-assessment provides an overview of where the community stands relative to the industry as a whole. As multiple stakeholders representing various segments of the community undertook the assessment, the standard deviation is provided. This indicates how much consensus there is across the self-assessment participants related to the community's perceived performance.

For the purposes of this assessment, West Nipissing was compared with 34 Canadian destinations and to the global scenario representing 232 destinations from around the world. West Nipissing scored **below** the industry average on both Destination Strength and Community Support & Engagement which places the community in the "**Explorers**" category.

Explorers are defined as having the following key challenges:

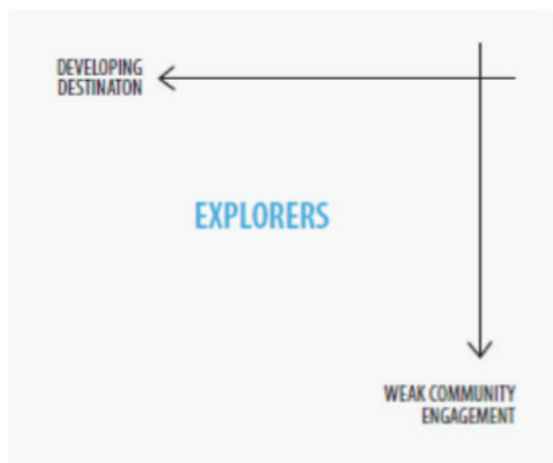
- Rallying the community to work together towards a realistic vision and strategy;
- Building community recognition and acceptance that transformational change is needed; and
- Implementing the strategy with limited resources.



The “Explorer”

Developing Destination – Characteristics:

- Medium awareness of the destination
- Some concerns on transportation access
- Mixed quality and quantity of facilities and products
- Some improvements in customer servicing needed
- Business results lag behind some key competition
- Need for more activities and events
- Future business booking forecast is moderate
- Destination developing its capacity



Weak Community Engagement – Characteristics:

- Lack of a destination management plan
- Political support comes and goes
- Local residents not aware of tourism’s importance
- Industry inconsistent in their involvement
- Limited connection to businesses outside of tourism industry
- Customer service quality varies from place to place
- Lack of integrated approach with partners and stakeholders
- Lack of funding to market and manage destination

For the complete Destination NEXT diagnostic report of West Nipissing see Appendix D.

SURVEY QUESTIONNAIRES

In order to garner insight and ideas from a broad audience, the Project Team developed bilingual web-based surveys targeting residents, local business owners and young adults. Samples of the surveys and a detailed summary of responses can be found in Appendix B.

Key Elements in the Surveys

In addition to demographic information, the following key elements were included in the surveys and adapted to the target group.

- Desirable area attractions and amenities
- Number of visits and level of satisfaction w
- Downtown services and amenities
- Potential opportunities for Minnehaha Bay/Marina, Sturgeon River Corridor and Downtown development
- Assets, opportunities and challenges

Survey Distribution

The survey was promoted using various communication tools such as postcards, social media, Municipal website, radio, etc. A copy of the marketing material can be found in Appendix D. The project was promoted for several weeks in the winter of 2016 to current and former residents, tourism operators, organizations and stakeholders in West Nipissing.

In total, 337 respondents completed the survey. The breakdown of response numbers for each stakeholder group is as follows:

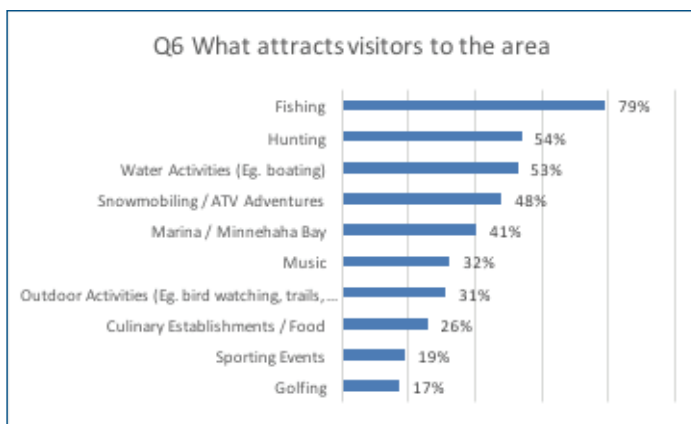
STAKEHOLDER GROUP	NUMBER OF RESPONSES
Local Residents	253
Local Businesses	32
Young Adults/Students	52

Given the number of respondents, the statistical significance of the sample is high and the thus provides confidence in the extent to which the data can be explored.

For the purpose of this survey the margin of error was calculated at plus or minus (+/-) 5 and a 95% confidence level was used.

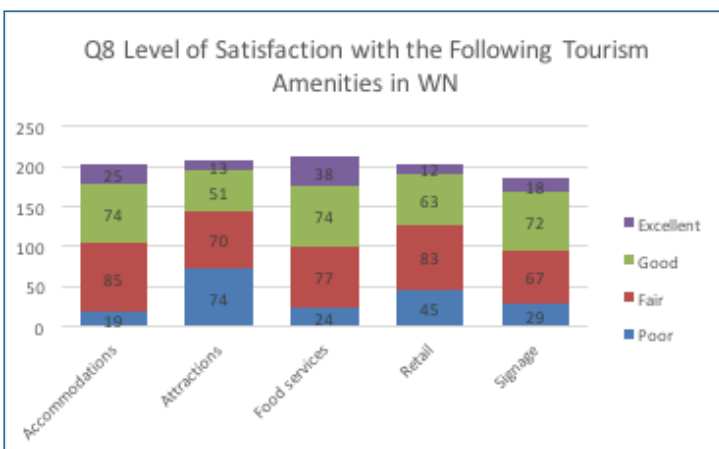
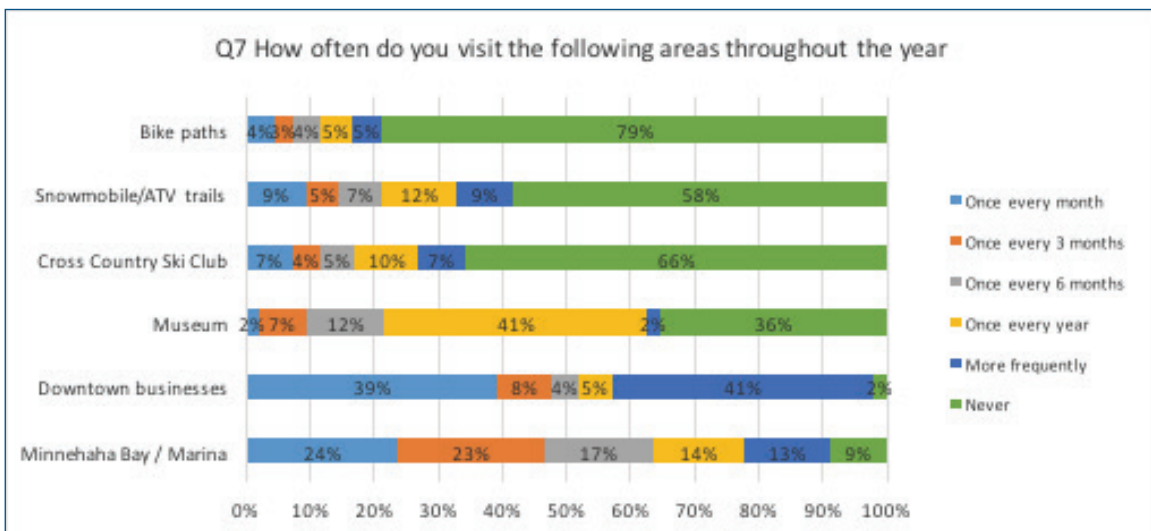
Community Survey Results

The following charts provide the top responses for each of the key questions in the Community Survey.



Fishing and Hunting remain top attractions for the area.

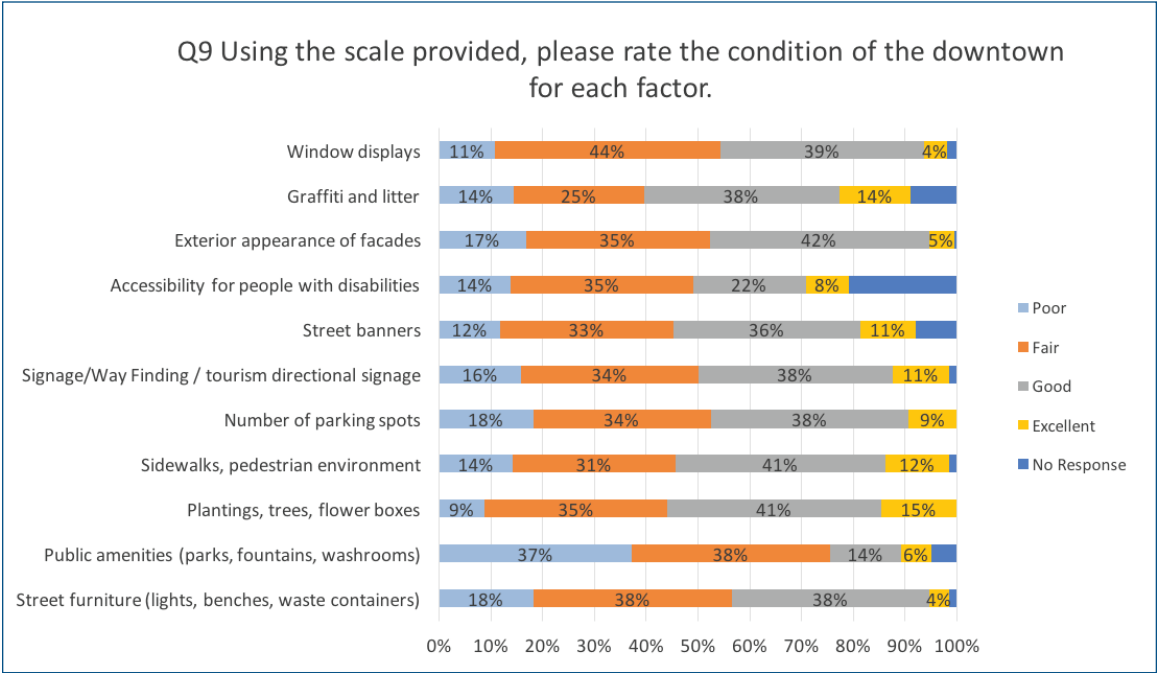
Natural resources and the outdoors is a core part of West Nipissing and well reflected within the top 10 attractions to the area.



The following chart depicts the level of satisfaction. Good and fair appear to dominate the responses for each element.

Downtown Specific Questions

When analyzing feedback pertaining to the Downtown, the following provides insight as to what is required for future growth.



Although the above chart is fairly detailed, it provides very specific weaknesses and strengths in the downtown. As there is room for improvement in most areas, items that were rated the lowest included public amenities (parks, fountains, washrooms), street furniture (lights, benches, waste containers), parking, exterior appearance of facades, signage/way finding and directional signage. The top rated factors in the Downtown were plantings, trees and flower boxes, sidewalks and a pedestrian environment, parking and street banners.

When asked the **main reasons people visit the downtown** the following were prioritized:

- ▶ Chip Stands 24%
- ▶ Shopping 21%
- ▶ Banking 15%
- ▶ Minnehaha Bay (ranked in youth survey as priority #2) 12%

In addition, the following responses were also identified:

- Food Services
- Attraction
- Discount Stores
- Groceries
- Bakery

A second reason for visiting the downtown included attending Bingo, Walking, and Festivals.

A look at Opportunities

When asked what three community assets participants would most likely to see developed in the downtown, the following were identified:

- ▶ Farmers' market 30-47%
(by Community, Students, Businesses in order of importance)
- ▶ Parking 16-30%
(by all, highest rating from Businesses)
- ▶ Downtown and shops 5-8%

Also rated as top 3 opportunities

- ▶ Plaques, signage, murals and art
- ▶ Walking paths and benches
- ▶ Entertainment, music
- ▶ Youth activities
- ▶ Gardens, trees

West Nipissing's Best Tourism Assets

Respondents were asked to name the best tourism assets that exist in West Nipissing. The following were among the top rated assets:

- ▶ Minnehaha Bay 10-17%
- ▶ Lake Nipissing 13-20%
- ▶ Fishing 9-18%
- ▶ Water, Nature, Outdoors 13%
- ▶ Leisure Farms 4-9%

Other that are worth mentioning include:

- ▶ Chip Stands
- ▶ Trails
- ▶ KOA-camping
- ▶ Francophone
- ▶ Twiggs
- ▶ Museum
- ▶ Boating
- ▶ Hunting
- ▶ Sports

West Nipissing's Biggest Challenges in Respect to Tourism Attraction

Participants were asked what could present a challenge to West Nipissing's Tourism Attraction Plan, the following responses were among the top rated challenges:

- ▶ Lack of public access to Lake Nipissing and no beach
- ▶ Fishing restrictions and number of fish in the lake
- ▶ Unattractive highway commercial strip, need trees, less harsh
- ▶ Accommodations
- ▶ Children's parks and youth activities
- ▶ Tired looking downtown area and not enough businesses
- ▶ Proximity to Sudbury and North Bay
- ▶ Speed boats on the river
- ▶ No biking and hiking trails
- ▶ Revamping attitudes and beliefs, not tourist friendly
- ▶ Signage, public washrooms
- ▶ Lack of support for community activities, volunteers always the same, infrastructure investments have low support

Product development to increase Tourism in West Nipissing

The following most recommended product development ideas were identified.

- ▶ To share the history of the town, walking tour, fur trade route theme at museum, historical plaques throughout
- ▶ Boat tours of River Corridor, excursions on Lake Nipissing, Chief Commanda
- ▶ Dedicated walking trails, bike paths, beach area improved and parks
- ▶ Developing on the Joie de vivre campaign, living and proving it
- ▶ More curb appeal
- ▶ More development of smaller communities not just Sturgeon Falls
- ▶ Yearly outdoor races, cross country running at ski club or canoe race, or mud/water challenge running course
- ▶ Marina area, walking trail, concerts and festivals
- ▶ More outdoor terraces like Twiggs downtown
- ▶ Coupons when visiting one location for use in other shops etc. to tie in and encourage tourists to visit multiple places
- ▶ Museum developed into an historical visiting site (e.g. Fort William in Thunder Bay)
- ▶ Boutique shops
- ▶ Waterpark and waterfront activities
- ▶ Municipal Economic Development working with the existing private sector (tourism, retail, agriculture)
- ▶ Ecotourism, Agri-tourism, Farmers' Market
- ▶ Connecting to all other communities and their activities (Field music festivals, Lavigne Tavern entertainment)

Detailed survey results are located in Appendix B.

Business Survey Specific Responses

There were a few targeted questions in the business survey. The following advantages and disadvantages to operating a tourism business in the area have been identified.

Advantages

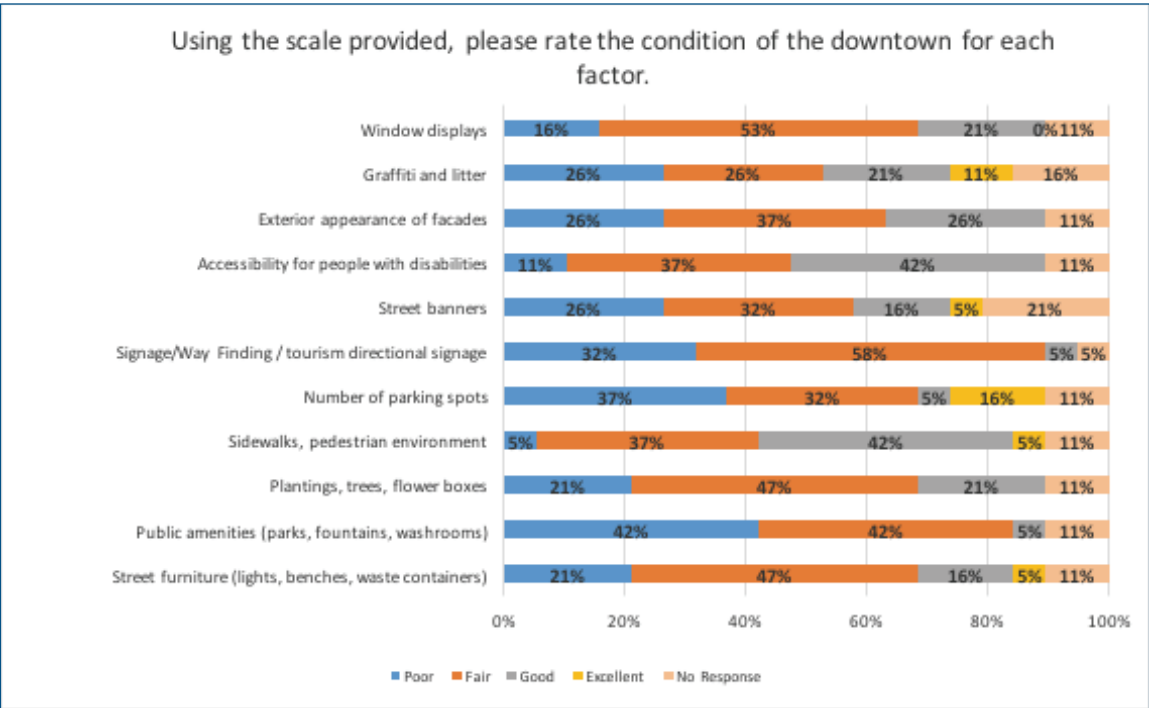
- ▶ Location of West Nipissing, along Hwy 17, proximity to larger centers
- ▶ Lake Nipissing, the Sturgeon River
- ▶ Minnehaha Bay
- ▶ Outdoor activities
- ▶ Supportive community and clients
- ▶ Loyalty year over year
- ▶ Large quantity of Crown land
- ▶ Sturgeon River, waterfront, access
- ▶ Word-of-mouth

Challenges

- ▶ Marketing and branding our area, the cost associated with advertising
- ▶ No representation within the Municipality
- ▶ Lack of curb appeal to the downtown to draw visitors, and its cleanliness
- ▶ Lower population
- ▶ Choices in other close areas
- ▶ Fishing limitations
- ▶ Lack of events, activities to attract tourists, variety
- ▶ Gravel roads or rough roads, for tourists with expensive gear (travel trailers and motorhomes)
- ▶ Restoring fish population

Similar to the Community survey, businesses were asked their level of satisfaction with tourism amenities.

When specifically looking at conditions in the downtown, responses are depicted in the chart below.



What would tourism businesses like to see developed in West Nipissing to support their sector.

Top responses included:

- ▶ Consider one-way options in downtown
- ▶ Review Front Street and King Street corridors to improve safety
- ▶ Hard for pedestrians to cross some of the streets in the downtown
- ▶ The dam as a site, working with Legion to re-purpose the entire property
- ▶ Continue boardwalk access
- ▶ Walking and biking facilities
- ▶ Dredging the mouth of the River to invite the Chief to Dock at Minnehaha Bay.
- ▶ Fix existing boardwalk at Museum Trails
- ▶ Rental of ATVs and Snowmobiles
- ▶ Make the town attractive, including businesses that are not downtown (Best practices- Renfrew, Eganville, Huntsville)
- ▶ Utilize the information centre
- ▶ Develop a park with diversity for all: slides, swings, sandbox, water slides, non-motorized water sports (kayaking, canoeing, etc.), benches under trees, outdoor activities for kids.
- ▶ Concert venue
- ▶ Public transportation between towns
- ▶ Something unique to attract visitors
- ▶ An app that has all businesses in West Nipissing, that tourists can access quickly and get info
- ▶ Signage for Tourist operators, on all area highways.

For a look at all responses and detailed summary, please refer to Appendix B.

As previously noted, a summary of key themes and findings stemming from the online survey responses and one on one interviews have been aggregated and consolidated within the SWOT and Gap Analysis. Complete survey results for each stakeholder group including responses to all open-ended questions posted in the online survey have been provided in Appendix E.

FOCUS GROUPS CONSULTATIONS & INTERVIEWS

The Project Team facilitated a series of focus group sessions to collect additional primary data and gain further insight through round table discussion format. In certain instances, there were people who were unable to attend the focus groups and these interviews were conducted over the telephone using the same questions as those included in the session presentations. Samples of the presentations used for these discussions can be found in Appendix C. The following stakeholder groups were consulted using this method:

- Sturgeon River House Museum Advisory Committee Members (10 participants)
- English Community Focus Group (8 participants)
- French Community Focus Group (8 participants)
- Business Focus Group (8 participants)
- West Nipissing Tourism Development Advisory Committee Consultations (10 participants)

Key Elements in the Focus Group Discussions

A series of open-ended questions were raised and discussed during the sessions. The questions related to topics such as the current tourism products and services offered in the community, existing assets and potential new products/experiences.

- Area Attractions and Amenities
- Downtown Attractions and Amenities
- Potential for Minnehaha Bay/Marina, Sturgeon River Corridor and Downtown development –
- Assets, opportunities and challenges

Focus Group Results Highlights

Throughout all focus groups, common themes were identified and the complete compilation of all ideas and comments are included in Appendix E. Although ideas were very similar to the survey responses, the discussion format allowed for more in-depth exploration of these ideas. Some of the most common themes included the following:

- ▶ Tournaments, sports, outdoor races

in the downtown/complex or kayaking and canoe races along the river, involving Minnehaha Bay and the Museum as checkpoints

- ▶ Francophone culture and area history
- ▶ First Nation cultural events
- ▶ Old mill property development
- ▶ Build on ideas for the Festivals
- ▶ Wayfinding, with outdoor large maps, smaller take away maps and potentially an app for the area
- ▶ Agri-tourism, Leisure Farms, Dalew Farms
- ▶ Connecting attractions – all regional communities but also connecting Minnehaha Bay to the Downtown via a trolley/train
- ▶ Community Pride and Education on Customer service

River Corridor and Minnehaha Bay

- ▶ A sturgeon fish hatchery and small information centre at Minnehaha Bay
- ▶ More events at the Museum such as mystery nights, more programming and events during the summer or vacation seasons, bonfires, special exhibits, art programs, food and picnic area with more docking for boaters, canoe and kayak rentals, fish fries Friday and Saturdays, Aboriginal exhibits
- ▶ Boat tours, that stop along different attractions on the River, Leisure Farms, Museum
- ▶ Working together along the river corridor
- ▶ Weekly big screen movie that is boat and shore accessible

Downtown Specific

- ▶ Authentic experience and adventures
- ▶ Touristy stores and boutiques, shops, cafés and cupcake stores
- ▶ Communication, Publicity, Digital Screen
- ▶ Benches, garbage cans, cleanliness, lighting
- ▶ Missing warmth and ambiance, outdoor dining, more patios
- ▶ Addition of murals on buildings that need a lift
- ▶ Horse and buggy tours

- ▶ Market
- ▶ Building on existing events, festivals, parade of lights
- ▶ One-way traffic, room for outdoor cafes areas, etc.
- ▶ Walking tours
- ▶ Improve the skatepark, to accommodate BMX, scooters and skateboarders
- ▶ CIP – Community Improvement program, new rules and standards, to help businesses in creating a downtown look.

Through these discussions the project team was able to assemble the SWOT Analysis as well as develop strategies for the Tourism Long Term Action Plan. With a focus on Downtown, Minnehaha and River Corridor, attraction and activities throughout the entire West Nipissing region were identified.

KEY SUCCESS FACTORS

Several of the participants feel as though they are the only ones that participate in the majority of community events, activities and sessions. The reliance on limited volunteers and resources was emphasized and an issue that re-occurred throughout the discussions. The following recurring themes came up throughout the discussions. The following factors that have a great impact on success.

- ▶ Support from the municipality to local clubs and associations
- ▶ Working together
- ▶ Include all communities in West Nipissing
- ▶ Leadership - a centralized mechanism for collaboration and communication needs to be in place
- ▶ Revitalizing the website - more user friendly, with a community calendar that is interactive and attractive to tourists researching the area
- ▶ Sharing and posting Information of events
- ▶ Calendar of Events – to ensure activities

within the community are not planned on the same night if possible, to strategically space out and plan what will happen, to ensure a continuous flow of activity and publicity

- ▶ To really make good use of bodies of water - sites to see, tours and options for day-tourists such as rentals, map or app
- ▶ Municipal presence during events - promoting events
- ▶ Infrastructure improvements
- ex. Lac Clair
- ▶ Boardwalk on Minnehaha to be completed
- ▶ Social Media and web presence, accessibility, blogging, Facebook (using pages for residents, ex-West Nipissing residents, etc.) to share what activities are going on in the area
- ▶ Education - on customer service and tourism contribution to the economy for West Nipissing residents / businesses
- ▶ Celebrate Francophone culture
- ▶ Bilingualism – Ensure that all tourists are comfortable and not intimidated to visit the area, use the Francophone culture as a great opportunity to distinguish community
- ▶ Ambassador program for area, promoting activities, events, attractions

A summary of recurring themes, ideas and comments have been aggregated within the SWOT and Gap Analysis which can be found in this document.



4 - SWOT & GAP ANALYSIS

The next step in the study process involved aggregating the information gleaned through the primary and secondary research. The process involved identifying community resources, strengths and weaknesses to define existing capacity and gaps.

The following SWOT and Gap Analysis highlight the most critical and recurring themes that emerged from the consultation findings. The reason for presenting these themes is twofold. First, they inform the context of the current state of tourism including assets and gaps across West Nipissing from the perspective of the consultation participants. Second, these themes inform actions and recommendations within the Long Term Action Plan.



4.1 SWOT ANALYSIS

SWOT is an acronym for Strengths, Weaknesses, Opportunities and Threats. By definition, Strengths (S) and Weaknesses (W) are considered to be internal factors over which there is some measure of control. Opportunities (O) and Threats (T) are considered to be external factors which are outside of the range of control. A SWOT views all positive and negative factors inside and outside an organization/industry/community that affect success. A consistent review of the tourism environment in which the community operates helps in forecasting the changing trends and allows them to be included in the decision-making process.

STRENGTHS & WEAKNESSES

The strengths and weaknesses identified in the SWOT Analysis are internal variables that **can be influenced by the Municipality and its stakeholders**. The goal is to shift weaknesses into strengths through the development and implementation of strategies and actions. Reviewing the SWOT on a regular basis will assist the Municipality in identifying which weaknesses have been successfully converted into strengths. This process will also provide a mechanism to measure the success of the strategy.

Strengths	Weaknesses
<ul style="list-style-type: none"> ▶ Most bilingual community in Ontario ▶ Strong francophone culture ▶ “Joie de vivre” brand has been well implemented for resident attraction ▶ Friendly people/communities ▶ New developments at Minnehaha Bay ▶ Many historical sites and landscapes ▶ Nice sporting facilities (i.e. soccer fields, baseball, recreation complex etc.) ▶ Waterways: Sturgeon River, Minnehaha Bay, Lake Nipissing ▶ Quality fishing, hunting, camping, water and outdoor activities ▶ Many trails (snowmobile, cross country skiing, wilderness walks) ▶ Festivals (e.g. Rib Fest) ▶ Well known for chip stands ▶ Four-season destination with high number of tourists ▶ Transformation from an industry town to a living community ▶ Four-season tourism opportunities within the municipality ▶ Strong volunteer base 	<ul style="list-style-type: none"> ▶ Difficult to identify each community entrance ▶ Lack of marketing material available ▶ Perception that there is little to do ▶ Lack of proper signage for businesses/attractions ▶ Lack of consistent hours of operations of most businesses ▶ Street names difficult to see ▶ Perception that there are not many parks ▶ Nothing to do for young adults ▶ Lack of regional public transportation ▶ Lack of branded casual dining restaurants ▶ Limited services at tourism information centre (hours, resources, etc.) ▶ Lack of marketing strategy with action plan and designated resources to implement ▶ Poor road conditions, lack of curb appeal to draw visitors, keeping the downtown clean ▶ After a couple of days, most visitors have exhausted the field of local activities ▶ Limited eating establishments in West Nipissing with a higher standard of cuisine ▶ Viewed as a retirement town, with nothing for young adults/teens ▶ No change to attractions, same offerings year after year, nothing new ▶ Lack of parking ▶ Lack of accessible tourism information ▶ No dedicated staff to carry out new initiatives and growth of the tourism sector ▶ Working in silos: lack of collaboration between the tourism sector, chamber of commerce and municipal economic development department ▶ The infrastructure to support tourism, parks, marinas, hotels and restaurants, major attractions and activities is either incomplete or decaying. ▶ Lack of support from municipality for non-profits and social groups organizing events and attractions ▶ Lack of community buy-in and transparency – keeping the community informed and motivated

OPPORTUNITIES & THREATS

The opportunities and threats are the external variables that **cannot be readily influenced by the Municipality and its stakeholders**. The opportunities and threats can impact the speed at which weaknesses can be shifted to strengths. These external variables should be considered on an ongoing basis when implementing the recommendations outlined in the Long Term Action Plan. The external factors can also influence the level of priority attached to each weakness.

Opportunities	Threats
<ul style="list-style-type: none">▶ 8,000 to 10,000 vehicles passing through daily▶ Regional market territory of approximately 234,000 people▶ One of the very few northern municipalities showing population growth (+7.1% since 2001)▶ Significant seasonal in-migration of cottagers▶ Geographic location (between two larger centres)▶ Located on Highway 17▶ Build on an already strong tourism sector▶ Rich history▶ Tri-lingual/tri-culture – English, French and Aboriginal▶ Low Canadian dollar	<ul style="list-style-type: none">▶ Larger centers/competition offer more services (i.e. public transportation, qualified workforce, larger markets, etc.)▶ Fishing restrictions on Lake Nipissing▶ The municipality must deal with stakeholders with radically different needs (i.e. incorporates five towns and 25 townships, covering 1,200 km²).▶ Weather▶ Economy▶ Youth out-migration and ageing population

4.2 GAP ANALYSIS

Similar to a SWOT analysis, a tourism Gap Analysis benchmarks existing resources and highlights gaps in products and services. The Project Team analyzed the current tourism product offerings in the Municipality of West Nipissing and has identified several gaps below. The gaps are categorized by whether they are specific to the downtown, the Sturgeon River Corridor, Minnehaha Bay and Community Wide.

Recommendations on how to address the identified gaps form the basis of the Long Term Action Plan. Please refer to this document for a detailed approach on implementation.

GAP	DOWNTOWN	RIVER CORRIDOR	MINNEHAHA BAY	COMMUNITY WIDE
Way Finding / Signage	x	x	x	x
Beautification / Ambience / Lighting	x	x	x	x
Organized tours	x	x		x
Connectivity / Transportation / Access	x	x	x	x
Places to sit / public spaces	x		x	x
Pride of Place				x
Quality customer service (lacks consistency)				x
Sufficient quality accommodations				x
Boutiques / specialty stores	x			
Regularly scheduled activities / experiences	x	x	x	x
Availability of tourism information	x	x	x	x
Awareness of and lack of sporting equipment rentals (canoes, bicycles, etc.) with marked trails/paths for use	x	x	x	x
Parking (docks, vehicles)	x	x		
Quality / condition of roads	x			x

4.3 SUMMARY OF PRIMARY RESEARCH

The qualitative research confirmed that West Nipissing needs to progressively fill tourism gaps in order to bolster visitor attractiveness. An emphasis should be placed on embracing the community's culture. West Nipissing's strong cultural ties, sense of community, broad range of natural attractions and proximity to larger centres suggests that the community holds broad appeal as a destination. Tourism receipts can increase by using specific events and activities to serve as a draw for travel to West Nipissing. In addition, an opportunity exists to use emotional drivers of experiential products/services that are focused on francophone culture. Effectively utilizing and building on the "Joie de vivre" brand will increase interest in the region exponentially.

To this end, the qualitative research also added insights on how product gaps need to be closed. It provided awareness on what West Nipissing can and should offer. In essence, the need for unique, accessible and authentic products in the region was highlighted, as was a desire for a mix of passive and active experiences. Importantly, the research also showed that products and services that require packaging, were intrusive, had a negative impact on the environment and could be found in either Sudbury or North Bay were not desirable.

Closing of tourism gaps could progressively see West Nipissing positioned as a leading tourism destination within the region where visitors can experience something unique and culturally rich in nature. An integral component of the study was to set goals and develop recommendations to build on existing assets and best fill the identified gaps.

Copies of the marketing materials used to generate interest and awareness to support the primary research component of this project can be found in Appendix F.



5 - MARKET ANALYSIS

Pulling from primary and secondary research, a market analysis was conducted in the course of the initiative. This helps to summarize key points from the research and highlight what from the SWOT should be prioritized in the recommendations. In addition, the following section provides an overview of key trends, and relevant tourist market segments to be considered when building the tourism strategy and communication plan.

5.1 KEY TRENDS

Key trends emerged as a result of the research on regional visitation patterns, current community strengths and assets, the community's best bet markets as well as the Project Team's understanding and knowledge of the industry and what visitors are seeking in terms of quality tourism experiences.

Outlined below are the key trends and sub-trends that influence travel and tourism decisions now and into the future. A description of the trend, factual data, and niche opportunity is provided below. In addition, best practices as they related to each trend along with a synopsis of how West Nipissing can capitalize on the trend are identified.

The objective of providing examples of best practices is threefold:

1. To gain insight into what other organizations / communities / regions are doing including approaches, tactics and players;
2. To understand potential post-strategy implementation issues and identify means to mitigate these challenges; and
3. To showcase scenarios and case studies which have generated positive results and outcomes thereby building momentum at the local level.

A series of Best Practices are summarized for each key trend and include tangible examples of initiatives that have been undertaken in various jurisdictions around the world. The objective in providing these mini case studies is to inspire and stimulate the Municipality's thinking and to demonstrate that even small projects can lead to big outcomes.

EXPERIENTIAL TOURISM

Wherever visitors originate, tourism trends the world over point to new type of visitors in the 21st century described as consumers seeking experiential, life-enriching vacations that involve culture, nature, the outdoors and learning. The Canadian Tourism Commission (CTC), in its 2012-2016 Corporate Plan, identifies key segments of the tourism market and what tourists look for in choosing a vacation. Thirty-five percent of the global tourism market is described by the CTC as "Learners" – tourists interested in history, connecting with their roots, and seeking out cultural and historical aspects of their destinations. These visitors want "authentic experiences" that focus on local culture and foods, allowing them to engage all of their senses. They want to get 'behind the scenes' and be enriched by the people and places they visit. They are seeking local, educational, experiential and professionally-presented experiences which are:

- Reflective of regional products, history, geography and industry.
- Educational, including self-guided and guided tours.
- Professionally designed activities such as displays and seating galleries for presentations (e.g. brewery tours and tastings). There is increasing interest by families wanting their children to learn how food is grown and how things are made. At the same time, an educational experience has to hold a child's interest – or there needs to be something else for younger children to do onsite.
- Sensitive to the age and background of the visitors, for example, older visitors are often interested in seeing old farm equipment. Visitors from different countries spend different amounts of time at a venue. For example, visitors from the UK typically stay longer and buy less while Asian bus tour groups prefer to be "in and out in 40 minutes" and spend considerably more on gift items.
- Experiential and participatory. For example,

people can walk through gardens or on-farm processing areas or participate in a workshop on making beer. They can enjoy a tractor ride, sleigh ride and view the animals in their living space – all in a beautiful agricultural setting.

- Attractive and convenient for purchasing items made from locally grown products such as apple cider or a fruit pie or local crafts – mementos of their experience to take home.

One of the fundamental aspects of a successful experiential experience is that it involves all five senses, not just tasting, but also talking, touching, smelling and listening. The more of the senses engaged, the more likely an individual is to remember the experience, and creating unique memories is the currency of experiential tourism. People no longer want to show their friends their holiday pictures, they want to talk about the unique experiences they had.

Key elements of experiential tourism

- People create meaning through direct experience.
- The experience includes the people met, the places visited, the activities participated in and the memories created.
- The experience includes pre-departure trip planning and post-trip follow-up.
- Experiential tourism draws people into local nature, culture and history.
- Experiential tourism is low impact, low volume, and high yield.
- Experiential tourism is very personal, unique and individual for each visitor.
- Quality, memorable visitor experiences are a shared outcome between the visitor and the experience provider.
- Experiential tourism opportunities allow for personal growth and reflect the values and interests of the individual visitor.
- Experiential tourism provides diverse experiences that match the visitor's interests and provide a sense of personal accomplishment, thereby creating their own unique memories.
- The desired outcome of experiential tourism is to achieve a complete participatory experience that provides new knowledge and authentic experiences.
- Experiential tourism opportunities encourage the meeting and coming together of different cultures, their problems and potential.

- Cultural elements are shared in an atmosphere of traditional ways of life.
- Experiential tourism shows rather than describes.
- Experiential tourism opportunities expand personal horizons.
- Experiential tourism opportunities should provide personal enrichment, enlightenment, stimulation, and engagement as motivators.
- Experiential tourism attracts people to places.
- Experiential tourism attracts markets to merchandise.
- Experiential tourism engages all five senses.
- Experiential tourism opportunities include learning a new skill or engaging in a new activity.
- Experiential tourism includes "the story of the place."

OPPORTUNITY FOR WEST NIPISSING

Tourism products and service types that best represent Experiential Tourism opportunities for West Nipissing are those related to Cultural Tourism, Agri-tourism and Culinary Tourism.

Cultural Tourism

Cultural tourism is one of the largest and fastest-growing global tourism markets. Cultural tourism is focused on experiencing the places and activities that authentically represent the stories and people of the past and present. Festivals, traditions, food, museums, cultural facilities, historic and natural resources are all elements of culture tourism.

This affords West Nipissing with a significant opportunity to capitalize on its already well established Joie de vivre brand and attract more visitors by fully embracing, building on and promoting its francophone culture. Furthermore, it provides a direct tie in to the Province's current efforts to build and promote its francophone tourism product. Tangible examples of said opportunities are the francophone specific initiatives and funding tied to Canada's 150th anniversary and the recent focus on re-vitalizing of the Circuit Champlain touring route.

Working towards the full implementation of the Joie de vivre brand through development and community wide buy-in will not only position West Nipissing for promotion to its traditional markets but, over the longer term, towards attracting tourists from further afield.

BEST PRACTICES	PURPOSE / OBJECTIVES	LESSONS LEARNED	OPPORTUNITY FOR WEST NIPISSING
<p>Project: Bavarian Village</p> <p>Location: Leavenworth, Washington</p> <p>Description: Leavenworth is small town in Washington that reinvented itself after the loss of its railway and timber industries. The Bavarian theme was carefully researched, architects were hired, building codes were changed and townspeople took to learning about the German culture and have fully adopted the Bavarian theme throughout the community including architecture, music, food, clothing, service, souvenirs, festivals and events.</p> <p>Leavenworth is now one of the most prosperous tourist towns in the world!</p>	<p>Position itself as a Bavarian Village in efforts to diversify and sustain its economy</p>	<p>Educate community about potential opportunity to position community as leading tourism destination</p> <p>Identify community champions who are willing to take the first step and invest in the concept</p> <p>Eventual need to mandate some level of adherence to theme through building code or other</p> <p>Must ensure authenticity of product</p> <p>Ensuring evident visual difference</p>	<p>As the most bilingual community in Ontario West Nipissing has an opportunity to fully embrace the concept of developing and adopting a "French" themed village</p>

BEST PRACTICES	PURPOSE / OBJECTIVES	LESSONS LEARNED	OPPORTUNITY FOR WEST NIPISSING
<p>Project: Little Free Libraries</p> <p>Location: Worldwide</p> <p>Description: Little Free Libraries are miniature structures that look like a house, complete with a glass door, sloping roof, and one or two shelves that are filled with books placed by the community for the community. As of January 2016, there were over 36,000 registered Little Free Library book exchanges in all 50 U.S. states and over 70 countries around the world.</p>	<p>To increase literacy</p> <p>To beautify the community through functional public art</p> <p>To increase community pride and engagement</p>	<p>Initial cost can be a challenge</p> <p>"Library" locations should have a lot of foot traffic and be highly visible to anyone nearby</p> <p>Need to identify champions and caretakers</p> <p>Encourage participation from businesses and residents</p>	<p>Establish Little Free Library program in West Nipissing in partnership with NPO (e.g. Literacy Alliance), local schools</p> <p>Ensure customization builds on Joie de vivre brand</p> <p>Create events to build on program such as "festival du livre"</p> <p>All existing "Little Libraries" in Northern Ontario are private owners without full community participation</p> <p>Can be used for community promo materials and tourist info</p>

AGRI-TOURISM

The University of California's Small Farm Center defines Agricultural Tourism as "the act of visiting a working farm or any agricultural, horticultural or agribusiness operation for the purpose of enjoyment, education or personal involvement in the activities of the farm or operation." Agri-tourism is a subset of a larger recreational industry called rural tourism that includes visits to rural settings or rural environments to participate in or experience activities, events or attractions not readily available in urbanized areas.

Agri-tourism is an economic development strategy that has been demonstrated in a number of countries as a way for farmers to add value to their farm businesses. A major tourism trend focuses on a new type of visitor looking for sustainable, environmentally conscious holidays and authentic travel experiences – experiences that fit well with many agri-tourism activities.

The types of activities that fall within the agri-tourism spectrum can include:

- roadside stands and markets
- food activities: "Pick/Cut/Gather/Grow/Process Your Own"
- farm activities: haying, threshing, plowing, fencing, sheep shearing, lambing, egg hatching

- bed and breakfast/farm vacations
- specialties: wine, cider, maple syrup, flowers, herbs
- animal feeding and petting areas
- seasonal festivals: Fall harvest, Halloween, Christmas, Spring, strawberry
- hay and/or sleigh rides
- hiking/scavenger hunts, Easter egg hunts
- barn dances (square dancing)
- birthday and corporate parties
- weddings, family reunions
- horseback riding
- photography/painting
- school tours and summer day camps
- cross-country skiing/snow shoeing/snowmobiling
- historical interpretation and re-enactments
- mazes, rock climbing
- wildlife viewing (birds, deer, etc.)
- scarecrow-making, pumpkin carving/painting
- theatrical or puppet shows and musical events
- community charity events
- movie shoots

BEST PRACTICES	PURPOSE / OBJECTIVES	LESSONS LEARNED	OPPORTUNITY FOR WEST NIPISSING
<p>The project: The Rock Ranch</p> <p>Location: Upson County, Georgia, USA</p> <p>Description: Working cattle ranch that hosts different annual themed events for families during all four seasons including Christmas and Easter celebrations, spring break, a strawberry festival, Saturdays on the farm, fun in the summer, fireworks festival, fall fun day, Columbus day and National Pumpkin Destruction Day.</p> <p>Onsite activities include train rides, zip lines, jumping pillows, carousel, cane pole fishing, pedal boats, and pony.</p> <p>Additional activities are geared to school and corporate groups as well as birthday parties and family events.</p> <p>Lodging available on site.</p>	<p>Provide 4 season tourism activities</p> <p>Showcase agriculture and its importance of sector to the community</p> <p>Increase pride of place</p> <p>Capitalize on regional market and VFR</p> <p>Encourage healthy families.</p>	<p>Diversification to cater to various markets is essential to successful expansion</p>	<p>Build on existing assets in agri-tourism</p> <p>Work with local farms to expand their offerings (e.g. tours; events; onsite stays etc.)</p> <p>Build on Feast on the Farm concept</p>

CULINARY TOURISM

Increasingly, destinations and communities across the province are working to develop culinary / food tourism as a motivator for attracting tourists. According to the International Culinary Tourism Association (ICTA), the interest in food and drink is reflected in the growth of food media, the explosion of the local food movement, and the number of mainstream events now featuring local and regional cuisine. This is certainly the case in Ontario.

In its 2010 report (The State of the Culinary Tourism Industry Readiness Index), ICTA cites Ontario as one of three worldwide leaders in culinary tourism among the nine countries surveyed. The Province is characterized as a “hot-spot” based on the level of culinary tourism activity.

Research findings of the International Culinary Tourism Association (reported at a North American culinary tourism conference in Victoria, British Columbia in 2004) underline just how vital this sector of the tourism industry is. Nearly 100 per cent of all tourists dine out when traveling, and food and beverage as a category ranks first and foremost in visitor spending - even more than lodging.

Economic Impact of Culinary Tourism

- Eating local food has a 3:1 impact on local economy².
- Average Culinary Tourist spends double that of a generic tourist and 40% more on accommodations. (Ryerson University Study)
- 85% of Culinary Travelers enjoy learning about the local culture and cuisines
- 66% want to try regional cuisines, culinary specialties and local wines and spirits
- 70% of Culinary Travelers enjoy bringing back regional foods, recipes, wines from places they have visited to share with family and friends

Culinary Tourism Programs

Communities embarking on a culinary tourism program need first to understand and identify all the assets of the regional culinary and food system. Understanding what is available is fundamental to designing a successful program and packaging the products and experiences within it. One of the most important critical success factors is the creation of an asset inventory including:

- Facilities such as farms and restaurants
- Activities such as berry picking;
- Events such as food festivals;

A program can combine some or all of these elements but will often have a geographic component as well, such as a culinary trail, that serves both as a unifying element for the program and as the cornerstone for its branding.

The key component of any culinary tourism program is a local group of stakeholders and strong leadership. It is critical for the economic development department - or any other designated leadership body for the program - to locate, contact, and invite eligible establishments to participate in the culinary tourism program. All the links in the program need to understand that they rely on each other, not just for supply but to support the brand, quality assurance and joint -marketing strategy.

Dining is consistently one of the top three favourite tourist activities. (Source: Quantified Marketing Group 2010). There is a high correlation between tourists who are interested in cuisine and those interested in activities akin to those that are being proposed for West Nipissing.

Summary of Critical Success Factors for Culinary Tourism

Focus on Authentic & Unique Experiences

-- Take advantage of the unique heritage, charm, hospitality, and sense of place that already exists in West Nipissing. Unique customer experiences provide hands-on, entertaining opportunities for visitors. These might include education about growing or preparing foods, cooking classes, and tasting events.

Partnerships -- It cannot be overstressed that culinary tourism involves many players. There is a need for these players to share the most effective possible communication and networking. Partnerships need to be built with local organizations, including cultural and general business organizations, as well as with government organizations at higher levels that can provide significant resources.

Leadership -- Studies have revealed the importance of strong and effective yet collaborative leadership to the success of culinary tourism programs. Key roles for the leadership organization are to direct the execution of the culinary tourism strategy, act as the conduit for communication among stakeholders and partners, and provide links to other culinary tourism initiatives and resources at levels ranging from local to international.

²(Excerpt from OCTA report - <http://combinedconference.org/LeHeup%20Presentation.pdf>)

Create a “Destination” -- Creating a destination means offering experiences that customers are willing to pay for without sacrificing the uniqueness of the place. In some cases this may mean coordinating with neighbouring businesses or communities to develop more weekend itineraries that encourage overnight stays. Work together with local lodging, food service, and agricultural enterprises to create a network of services for guests.

Integration and Planning-- The development of culinary tourism should become part of the tourism strategy of a community. Successful culinary tourism programs ensure that services such as accommodation, shopping, recreational attractions and information services are readily available and promoted in a way that helps support the culinary tourism activities.

Financial support and performance measures -- Most culinary tourism products require a few years to become established and successful. They need long-term investment resources and financial plans.

They also need to demonstrate success to their funding organizations by means of measurements such as revenues, additional spending by tourists, increased person-trips and the like.

Quality Assurance - Businesses that serve tourists are the front door of the community. Product Development should always be a top priority and it never ends Good first impressions are essential and require trained staff that interact well with customers to ensure a safe and high quality experience. These customers will likely return and tell other potential customers about the business.

Shifting from Products to Experiences – This involves moving beyond a list of products to tell a story. In developing experiences, the focus is on emotions, feelings, sensations and the stories visitors will learn about their destination and the connections they will make.

Summary adapted from the following resources:

http://www.ecdevjournal.com/index.php?option=com_content&task=view&id=232&Itemid=48

<http://www.uvm.edu/tourismresearch/agritourism/agchecklists/CulinaryTourismBestManagement.pdf>

<http://ontarioculinary.com/resources/case-studies-and-best-practices/developing-culinary-tourism-for-your-region-best-practice>

http://en-corporate.canada.travel/sites/default/files/pdf/Resources/sec_exptoolkit_lores_final.pdf

BEST PRACTICES	PURPOSE / OBJECTIVES	LESSONS LEARNED	OPPORTUNITY FOR WEST NIPISSING
<p>Project: The Barossa Box</p> <p>Location: Barossa Valley, Australia</p> <p>Description: A branded cardboard wine box that visitors can collect from their hotels and fill up as they tour the region. Once they've filled the box with wines from different wineries it can be shipped back to their home either interstate or overseas.</p>	<p>Encourage touring in the region</p> <p>Encourage wine sales at local vineyards</p> <p>Increase economic impact</p> <p>Build on brand</p> <p>Provide a take-away</p> <p>Provide an immersive experience that visitors will share with others</p>	<p>Ensuring the visitor leaves with a memory and a tangible take away</p> <p>Use every opportunity to build on the brand</p> <p>Provide immersive and fulsome experience</p> <p>Measure the ROI through visitation stats and actual sales</p> <p>Make it easy for the visitor to participate and benefit fully from the experience</p>	<p>Work with local businesses to develop experiential tourism offerings that promote the community culture</p> <p>Fully embrace the Joie de Vivre concept in all aspects of development to ensure 5 sense experiences (e.g. music, food, ambience, lighting, service, unique and authentic offerings)</p> <p>Focus on opportunities to commercialize the experience to ensure product sales and takeaways</p>

BEST PRACTICES	PURPOSE / OBJECTIVES	LESSONS LEARNED	OPPORTUNITY FOR WEST NIPISSING
<p>Project: Taste Trail</p> <p>Location: Price Edward County, ON</p> <p>Description: The Taste Trail is an award winning signature program of the Food and Wine Establishments of Prince Edward County which focuses on promoting through mapping and standardized touring signage, wine and culinary packages. www.tastetrail.ca / www.artstrail.ca</p>	<p>To build on the growing locavore and experiential tourism brand</p> <p>To showcase area products and producers</p> <p>To encourage entrepreneurship.</p> <p>To develop a niche product</p>	<p>Set standards at the outset and stick to them to ensure a quality experience</p>	<p>Develop foodie and farm touring routes to promote local producers</p> <p>Build on Feast on the Farm model</p> <p>Encourage use of local foods in restaurants</p> <p>Create themed weeks or “summer-licious” type programs</p> <p>Develop a “French Canadian” food experience or tour</p>

DOWNTOWN REVITALIZATION

The direct impact of downtown revitalization on local economies is well documented. Investment in revitalization creates jobs, increases property values and attracts tourists, all of which are economic benefits to the towns and cities making those investments.

Knowing this, the Canadian Urban Institute (CUI) conducted a study entitled The Value of Investing in Canadian Downtowns. This study reviewed best practices in 10 Canadian downtowns to determine factors that contributed to a great downtown. Assessing Halifax, Fredericton, Ottawa, Toronto, London, Winnipeg, Saskatoon, Edmonton, Vancouver and Victoria, the following factors were identified:

- Architecture and Design: landmark projects, heritage protection, development at the human scale.
- Connectivity: appropriate forms of public transit, walking, cycling, marine design for all ages.
- Culture: vibe, values, virtuosity.
- Innovation: education and research, partnerships and networks, universities and colleges, educated and skilled labour force.
- Employment: a variety of an medium sized enterprises, creative industries, diverse economic base.
- Public Realm: quality streets and streetscape, plazas and squares, parks and other gathering

places, destinations, private space that enhance the public realm (e.g. sidewalk cafes).

- Sustainability: sustainable development, good air and water quality, community energy projects.
- Diversity: open fluid society that facilitates participation and opportunities for new immigrants.
- Venture Capital: availability of venture capital and management of market research.

When implementing a downtown revitalization strategy, it is critical that the following six (6) elements are incorporated into the decision making process.

1. Develop Clear Vision

A clear vision should be established that reflects consumer trends, attitudes, land uses and activities. Community stakeholders and businesses must be committed to supporting the vision over a long period of time. It is critical to note that short-term decisions will affect the long-term vision.

2. Ensure Appealing Streetscape

To establish a healthy downtown, a professional appearance and vibe must be generated. This includes facades, signage, building exteriors, lighting, sidewalks, roads, marinas, docks and any other physical elements. Investment into upgrades and ongoing maintenance to ensure a visually appealing look supports the overall brand of the community.

Developing minimum standards and by-laws can achieve consistency and manage expectations effectively. Consideration can be given to:

- Cleaning windows and entrances
- Removing snow and creating paths to buildings
- Installing ramps to ensure accessibility
- Unified garbage bins and cigarette disposals
- A-frame signage to indicate businesses are open
- Uniform vertical signage

3. Promote Strong Brand

Ensuring a strong brand presence allows visitors to the community to associate positive feelings to the geographic area. This can be accomplished by:

- Marketing strategies to increase awareness and promote the aspects about the downtown.
- Hosting events/activities and attracting businesses that complement the overarching brand.
- Public relation strategies and stimulating positive word-of-mouth.
- Experiences that create energy and excitement.
- Strategies to differentiate from other commercial nodes.
- Targeted approaches to appeal to specific niches.

4. Incorporate Variety of Amenities

Ensuring a balanced mix of services is critical to manage expectations and satisfy needs.

The following provides an overview of such amenities.

- A complementary mix of residential, retail and services.
- A balance of entertainment, arts, culture, heritage, food and beverage.
- Access to public washrooms.
- Directional signage to make navigation easy including signboards, directories and maps.
- Downtown buildings with heritage designations.
- Walking loops that connect landmarks, historical aspects, recreation.
- Sidewalk amenities such as art, benches, music, activities.

5. Ensure Community Outreach

Continue to work with the West Nipissing residents to ensure the overall brand is positioned favourably in their minds. Maintain open communication lines through presentations, forums, surveys and local promotions.

6. Implement accessibility practices

Accessibility must be a priority for the municipality and local businesses. A variety of tactics can be implemented to demonstrate this commitment. This includes ramps to access front entrances of stores, clear pathways free of snow/ice, pedestrian walkways/lights provide enough time to cross street.

BEST PRACTICES	PURPOSE / OBJECTIVES	LESSONS LEARNED	OPPORTUNITY FOR WEST NIPISSING
<p>Project: 101 Birds Reverse Graffiti Project</p> <p>Location: KwaZulu Natal, South Africa</p> <p>Description: A mural depicting native birds of the area was created by a group of Brand and Communications School students and recent graduates. The birds which represent the 101 Important Bird Areas (IBA) of South Africa are etched into a road interchange over a section of the Umegeni River.</p>	<p>Pay tribute to the abundant biodiversity in the area</p> <p>Bring awareness to birding tour opportunities</p> <p>Beautify high traffic area</p> <p>Build on existing brand</p>	<p>Working with local talent to showcase their abilities</p> <p>Building on and promoting an asset</p> <p>Tying together products and services through brand recognition</p>	<p>Community beautification building on culture / assets</p> <p>Work with local talent, students and other community members to assist with the beautification process</p> <p>Create murals and other visual representations depicting francophone culture and Joie de vivre brand</p>

BEST PRACTICES	PURPOSE / OBJECTIVES	OPPORTUNITY FOR WEST NIPISSING
<p>Project: Implementation of Community Improvement Plan</p> <p>Location: Bracebridge</p> <p>Description: Loan / grant packages available for industrial, commercial and mixed-use projects that increase the functionality of existing buildings, promote the development of vacant and underutilized sites, and improve or restore exterior building facades and signage. The Bracebridge CIP outlines a three-tiered Financial Incentive Structure that include Priority Site Incentives; Sub-Area Incentives; and Comprehensive Incentives for the following activities:</p> <ul style="list-style-type: none"> • Façade Improvement • Signage Improvement • Housing Rehabilitation • Building Improvement 	<p>To increase the Town's overall tax base and revenues through business start-up, expansion, and attraction</p> <p>To ensure that community improvement work reinforce and support Bracebridge's overall brand identity</p> <p>To improve community spaces and linkages</p> <p>To measurably improve public and private buildings, properties, and infrastructure</p> <p>To encourage the formation and start-up of new business enterprises in the Town</p> <p>To encourage new business start-ups and investment</p>	<p>Revamp and re-institute the CIP with new parameters</p> <p>Implement using a phased approach which allows for expansion of the designated CIP area</p> <p>Re-evaluate the cost sharing model to place more of the financial responsibility on the business owner (e.g. mix of grant, interest-free loan etc)</p> <p>Set "look and feel" guidelines to meet community brand objectives</p> <p>Work with non-profit for development, implementation, promotion, monitoring (potential for cost sharing of staff person)</p>

ACCESSIBLE TOURISM

Accessible tourism enables people with access requirements, including mobility, vision, hearing and cognitive dimensions of access, to function independently and with dignity through the delivery of universally designed tourism products, services and environments. In addition to the social benefits, the market represents an opportunity for new investment and new service requirements, rarely provided by key players in the tourism sector.

There are 750 million people with disabilities worldwide. Adults with disabilities control over \$3 trillion in discretionary income worldwide (National Organization on Disabilities), which is predicted to spike.

By 2012 accessible tourism was seen as the fastest growing business opportunity in the tourism industry. It is also a fact that the tourism industry needs to recognize that this business opportunity includes the ever increasing number of older members of the population around the world and realize that this unique market of people with disabilities and the older members of the community, as being very profitable.

70% of people with disabilities are able to travel, but because of the lack of accessible tourism accommodation and other venues such as restaurants, museums, theme parks etc., they

do not. There is an enormous mismatch between demand and what is offered by tourism providers in the way of infrastructure and services, neither of which is meeting the needs of people with disabilities.

People with accessibility needs have the desire and the right to travel like everyone else. However, their travel experiences are still highly restricted by physical barriers such as transport and inaccessible accommodation. Accessible Tourism cannot be termed a 'small niche market'. Accessibility is big business and the market is growing rapidly – partly because the world is growing older and old age generally goes in tandem with disability. This said, the demand is not only coming from people with disabilities, but also from elderly tourists, who do not see themselves as being in any way disabled, but who appreciate the fixtures and fittings found, for example, in accessible toilets/shower areas, as these aid their balance. There is also a lesser, but increasing, demand from families with young children for accessible facilities.

These are the extras that people remember, and separate an exceptional experience from one that is mediocre. With the right approach, West Nipissing has a golden opportunity to serve this important and growing market not only increasing visitation but also positioning the community as a leader in the industry.

BEST PRACTICES	PURPOSE / OBJECTIVES	LESSONS LEARNED	OPPORTUNITY FOR WEST NIPISSING
<p>Project: Tour Boat for the Disabled</p> <p>Location: Stockholm, Sweden</p> <p>Description: An association for disabled has designed and equipped the harbour and a special boat with equipment making it possible for disabled people to go out in the archipelago of Stockholm for activities such as game fishing, seal safaris and photo tours.</p> <p>The main activities undertaken were:</p> <ul style="list-style-type: none"> the construction of a pier in the harbour with a ramp for wheelchairs; the purchase of a specially equipped fishing boat allowing accessibility for disabled persons including incorporation of a "splash lift" 	<p>To make the nature in the Stockholm archipelago accessible for people with disabilities, giving them a chance for a more active life and to experience nature.</p>	<p>Involve several associations for disabled and rehabilitation actors in the project group</p> <p>Develop sustainable model</p> <p>High cost at outset – required public funding</p>	<p>Include and support accessible tourism development</p> <p>Work with operators to offer products and services geared to individuals with various disabilities and mobility issues</p> <p>Potential to develop similar boat (or other) tours</p>

BEST PRACTICES	PURPOSE / OBJECTIVES	LESSONS LEARNED	OPPORTUNITY FOR WEST NIPISSING
<p>Project: The Public Bench Project</p> <p>Location: San Francisco, CA</p> <p>Description: Web-based project maintained by a group of community public space enthusiasts that provide benches to encourage the use of public spaces and community mindedness.</p>	<p>To promote community-focused public spaces</p> <p>To build a sense of community by giving people a place to meet friends and neighbors</p> <p>To provide a rest space for tired walkers, the elderly, and others;</p> <p>To add an artistic piece of furniture for all to see;</p> <p>To encourage pride of place</p>	<p>Ensure all permits are adhered to</p> <p>Communicate that the bench is for public use</p> <p>Encourage placement throughout all neighbourhoods where relevant and not just main business areas for continuity and appeal</p>	<p>Develop local Public Bench Project in partnership with NPO (e.g. Community Living) and local businesses as a fundraising opportunity</p> <p>Engage local artists to customize benches that builds on the Joie de vivre brand</p> <p>Create tours with reverse graffiti as wayfinding</p>

SPORT TOURISM

Sport Tourism refers to travel which involves either observing or participating in a sporting event³ staying apart from their usual environment. Sport tourism is a fast-growing sector of the global travel industry and equates to \$7.68 billion⁴.

Internationally sports tourism is a thriving industry and one of the fastest growing sectors in the global tourism industry. World tourism arrivals are projected to grow at 4.3 percent per year and to reach 1.6 billion by 2020. In this same period, worldwide tourist spending is expected to grow at 6.7 percent per year and to reach US \$2 trillion (WTO, 2001).

In 2010, spending associated with the sport tourism industry across Canada reached \$3.6 billion, an increase of 8.8 per cent from 2008 and at a time when tourism demand for the Canadian tourism industry decreased by 0.7 percent. This provides strong evidence that sport tourism is one of the fastest growing segments within Canada's tourism industry.

Although sport tourism is a relatively new concept in terms of contemporary vernacular, its scope of activity is far from a recent phenomenon. The notion of people traveling to participate and watch sport dates back to the ancient Olympic Games, and the practice of stimulating tourism through sport has existed for over a century. As far as economic impact, the sport event category of sport tourism receives the most notoriety as it is increasingly common for organizers to calculate the amount of new dollars or hotel room nights an event generates. Within the past few years, sport and tourism professionals have begun to realize the significant potential of sport tourism and are aggressively pursuing this market niche. Canada and Ontario are actively working to get their share of this growing market and an opportunity to support these efforts exists.

Municipalities across the country are developing tailored and sleek sport tourism strategies and allocating their resources to grow the industry, resulting in an increasingly competitive field.

³Commonwealth of Australia (2000). "Towards A National Sports Tourism Strategy" (PDF). Retrieved November 6, 2009.

⁴<https://www.sportscommissions.org/Portals/sportscommissions/Documents/About/NASC%20Sports%20Travel%20Industry%20Whitepaper.pdf>

⁵http://www.mtc.gov.on.ca/en/publications/sport_tourism_planning_template.pdf

⁵There are a variety of types of sporting events that contribute to the overall sport tourism landscape.



A simple stratification of the market identifies six market segments as follows:

Given that all municipality's have a varying quantity and quality infrastructure, not all communities are well positioned to successfully pursue sport tourism as a feasible strategy.

The critical factors and foundational elements required for the successful development and implementation of a sport tourism strategy are as follows:

- Securing effective and sustained leadership;
- Creating the organizational capacity to engage all partners and stakeholders in working collaboratively to build a sport tourism industry. The full commitment of the municipality and its partners is essential. The most effective sport tourism strategies are driven by a strong allocation of dedicated resources;
- Establishing dedicated and adequate funding mechanisms to support key elements of the strategy including support for developing bids, event hosting, developing capacity and all other key elements where required;
- Implementing criteria for event funding selection and recommendations for levels of financial support;

- Providing tools and other supports to assist in developing the capacity of local and regional sporting organizations to bid and host events;
- Developing best in class sales, marketing, promotional and collateral materials (print/online);
- Focusing on selecting sporting events wherein the province and region have developed the strongest capacity for performance based on existing facilities/ infrastructure, experience in hosting previous events, technical capacity within the sport and other factors;
- Developing a strong network of volunteers;
- Advocating for the development of appropriate support infrastructure and facilities that will meet minimum standards for hosting events.

The range and scope of bidding opportunities is determined by the community infrastructure that is either in development or already in existence. This is not limited to arenas, sport fields, aquatic complexes, etc. It also includes accommodation, restaurants, transportation and media accessibility as well as athletes, volunteers and sponsors.

Understanding and fulfilling requirements for hosting events is critical to winning bids. While the key factors influencing the selection of host destinations are largely dependent on the objectives of individual rights holders or event leads, considerable consistency exists in the selection criteria across sporting organizations and associations.

The successful host must demonstrate the availability, quality and appropriate standard of infrastructure. This includes athletes, officials and spectator accommodation, venues, sport facilities and transportation.

To assess proposals, most event holders base their evaluation on the ability of the bid team to guarantee basic requirements tailored to their needs as follows:

- Infrastructure and Logistics
- Facilities/Venues
- Travel/Transportation
- Accommodation
- Investment required

- Media Broadcast/Television capacity
- Experience
- Marketing and Communications



Source: Lynn Morrow Consulting

Further, some privately held events may require financial incentives to consider a bid and/or to award the rights to host an event to a particular community.

The schematic illustrates the essential elements West Nipissing requires to successfully attract and host sport tourism events. These are reflective of the site selection criteria of event rights holders.

There are many critical factors associated to the successful adoption of sport tourism as an attraction strategy. Although West Nipissing has experienced some success in attracting regional and provincial events such as hockey and swimming tournaments, the community lacks the financial and human resources as well as the infrastructure, (primarily accommodations) required to aggressively pursue this market. Should the community choose to prioritize and pursue Sport Tourism in the future; significant efforts and resources will be required. Fortunately, there are numerous tools offered by the Canadian Sport Tourism Alliance that can assist the Municipality in further assessing their potential to pursue sport tourism such as the Sport Tourism Planning Template which can be found in Appendix G.

BEST PRACTICES	PURPOSE / OBJECTIVES	LESSONS LEARNED	OPPORTUNITY FOR WEST NIPISSING
<p>Project: Sport Tourism Strategy</p> <p>Location: London, Ontario</p> <p>Description: In 1997 the City of London approved a Sport Tourism initiative which is now directed by Tourism London.</p>	<p>To attract large numbers of visitors to the City</p> <p>To capitalize on proximity to Toronto</p> <p>To encourage year round visits</p> <p>To build community unity</p> <p>To benefit from event legacy</p>	<p>Significant financial resources and value in kind (VIK) must be invested to attract high calibre events.</p> <p>Providing turn-key service such as bid development, securing accommodations, venue coordination, marketing and volunteer recruitment is key.</p> <p>Community buy in and willingness to sacrifice the use of infrastructure for visitor use is necessary</p> <p>Significant effort to educate community about benefits is required</p>	<p>Undertake a sport tourism assessment to determine capacity and best bet opportunities based on existing assets.</p>

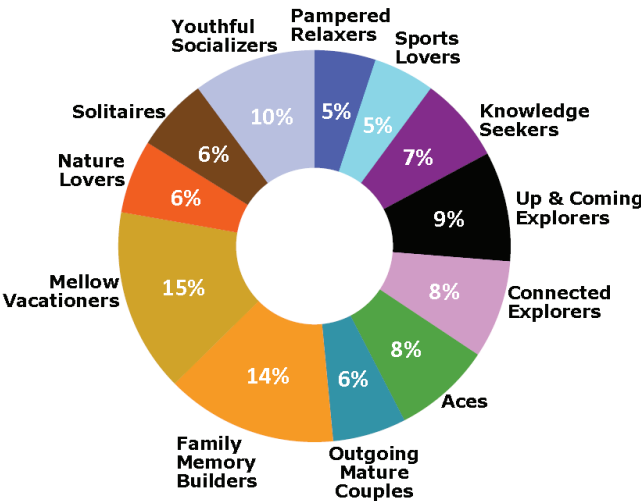
The following Best Practice touches on all trends. A sound way finding strategy is essential in ensuring that visitors can find what they are seeking and make new discoveries.

BEST PRACTICES	PURPOSE / OBJECTIVES	LESSONS LEARNED	OPPORTUNITY FOR WEST NIPISSING
<p>Project: Walk!Philadelphia</p> <p>Location: Philadelphia, PA</p> <p>Description: Pedestrian wayfinding programs which divides the city center into five districts (the convention center district, the historic district, the museum district, etc.), each with its own color-coded branding. The neighborhoods were knit together by an extensive system of signs and street maps.</p>	<p>Promote community assets</p> <p>Direct people throughout the community</p> <p>Cross promotion of attractions, activities, businesses</p> <p>Facilitate travel and movement throughout the City</p>	<p>The best systems comprehensively cover an entire community and use mapping as a key element</p> <p>Must take into account how people use information, how they travel (by bike, foot, or car)</p> <p>Appropriate use of colour and graphic styles can be used to reinforce local identity</p> <p>Ensuring clear sight lines to both the sign and destination.</p> <p>Map public attractions</p> <p>Comprehensive programs can also take the following into consideration:</p> <p>Sidewalks tell pedestrians where they're welcome.</p> <p>Public art draws people down a boulevard.</p> <p>Street lighting indicates where it's safe to bike at night.</p> <p>Street banners tie together an entire community – and inform passing cars when they've left it.</p>	<p>Develop comprehensive wayfinding strategy that includes signage, mapping, public art, unifiers etc.</p>

5.2 MARKET IDENTIFICATION

Segmentation divides travelers into groups with similar travel needs and interests. The Province of Ontario strives to grow the tourism industry and as such has provided key tourism segment information to support Municipalities or RTOs in their own Tourism Strategy⁶. We will also describe further in this section, the VFR segment (Visiting Friends and Relatives) as this has been identified as a key market during the consultations and data review process. Also included is specific Francophone Tourist segments that will help in building the future marketing strategy. This is a priority segment as it has been discussed throughout the consultations (primary research) reinforcing that the Francophone culture is one key distinctive advantage that has been identified.

The segmentation is constructed by considering Social and Emotional Needs, Importance of Travel, Use of Technology in Travel, Travel Experiences Sought. From the Consumer Insight Research Segmentation the following 12 segments were identified.



From these segments, the Project Team has identified the three top segments that have come out of the stakeholder consultations. These segments are:

- Mellow Vacationers
- Family Memory Builders
- Nature Lovers

These three segments represent 24% of travellers' dollars and is among the top 5 segments that reside in Ontario.

⁶Tourism Partners, Traveller Segment Profiles

⁷Tourism Partners

Mellow Vacationers



Mellow Vacationers

This segment wants to unwind on vacation, and relaxed and low key experiences are their preference. This group doesn't want itineraries or to do anything new or unusual. They want travel experiences that set them at ease. They aren't activity-oriented and often travel as a couple.

15%

Many of these travellers are couples above the age of 40 vacationing without children (with a skew towards the 55+ age bracket). They are fairly quiet, low energy people looking for a home away home where they can relax and find tranquility. Travelling is often a chance to visit family and friends. They are natural homebodies and when on vacation want to enjoy some simple R&R⁷. Quiet and introverted vacationers, they seek rest and relaxation and many find it being amongst nature. They will want to take in cultural experiences, seeking museums, history and galleries. They will search through online accommodation sites, online travel agencies and airline sites for the tranquil retreat. Also part of the VFR segment, they want to relax at a cottage, vacation home or time share on a vacation (well above average).

They will do leisurely sightseeing and some shopping. Of all the travel segments that skew older, they consume the most digital media.



Family Memory Builders



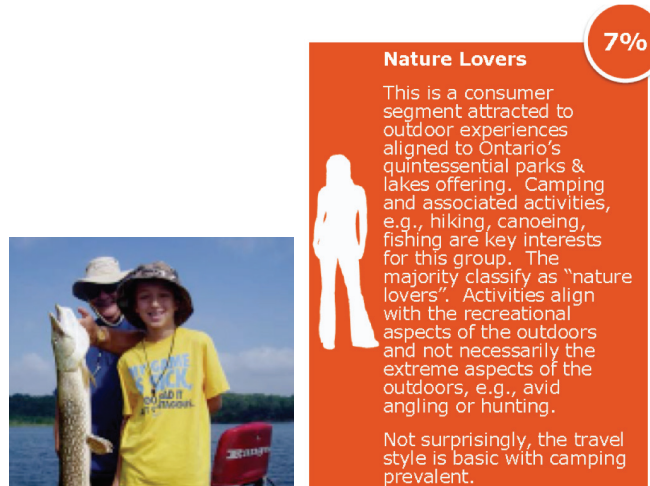
Family Memory Builders are couples with young children, aged 35-54 years old. These Gen X-ers are parents who have built their lives around their kids. Leisure for them is all about spending quality time as a family – at home and on vacationing. Travel is an opportunity to come together and bond through playful activities.

For these travelers, major attractions are a hit, 45% visit amusement parks, theme parks, zoos and aquariums. Their vacations are usually activity-filled, including taking in nature, the beach for example is a popular destination, and they also enjoy shopping. They plan their trips through consulting with family and friends, researching pamphlets, brochures, visiting accommodation websites and online travel agencies. They score above average for online usage including search engines, weather, shopping, parenting sites and Facebook.

They want to connect with family on vacation and create long lasting memories. They play together in all four seasons, taking in sites and fresh air activities. They would also fit into the VFR segment.



Nature Lovers

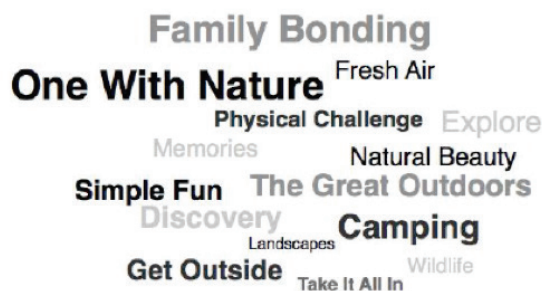


Nature lovers are typically families with kids (middle-age), have a passion for experiencing the great outdoors together. Travel for them is all about exploring new, undiscovered places, off the beaten path. Northern Ontario, especially is the perfect place for this segment who are looking to be dazzled by awe-inspiring nature.

With a lower than average travel budget, these travelers are happy with the basics, camping in a tent (71% of them stay in campgrounds or trailer parks), spending time as a family and taking in all the beauty around them.

They also can be found in the larger VFR target group, as they will travel to Northern Ontario to visit relatives and friends that live in proximity to nature. Their camping and related outdoor activities also include hiking, visiting beaches, national parks, fishing, canoeing, kayaking, ATV and bike trails.

Although some rely on family and friends when making their trip plans (above average), others use the Internet to plan including accommodation sites, online travel agencies and official destination sites. They will choose places to be awe-struck by the beauty of nature. They see their vacation as a time to make family memories. Their media habits are similar as the Family Memory Builders, including search, weather, Facebook, magazines and TV.



VFR (Visiting Friends and Relatives)



This segment, is quite large, over 58 million overnight tourists across Canada were travelling to see friends and relatives.⁸ Canadians dominate the VFR sector and Ontario attracts more VFR tourists than does any other province. Northern Ontario attracted almost 1.5 million of the VFR tourist segment.

As might be expected, there is considerable intra-regional VFR activity. Residents of Northern Ontario travelling to see their friends and relatives in other parts of the North account for over one half million (38%) VFR tourists. A further 689,000 of the North's VFR overnight tourists reside in Southern Ontario (47%). They are twice as likely as pleasure tourists to be in the North between January and March and October to December (time for family-oriented holidays), and they spread touristic activity including spending at stores, restaurants, gas stations and less commonly, lodging establishments throughout the year (1-in-10 of their nights in Northern Ontario are in paid lodgings). More women (57%) than men (43%) take overnight VFR trips to Northern Ontario. They are on average in their early 40s, but two fifths are under 35 years.

Francophone specific segmentation

The following chart gives a bit of an overview of Francophone Tourists, 1) Francophones from Québec, 2) Francophones from Ontario and 3) Francophones from France.



In 2007, 3.1 million visits to Ontario from Québec Francophones (for leisure, to visit relatives or friends and a smaller portion for business)

Most of them between 18 and 64 years old, families with school-aged children

Motivated by "new regions to explore", cycling is a popular activity in Québec, walking/hiking, visiting historical sites and museums, spas and yoga

Nearly half stay in hotels, motels, with trailer camping in second place

- French Services are important
- They are not fully aware of what Ontario has to offer



Ontario's Francophone community represents 4.8 % of the population

They respond well to Francophone Tourism products and marketing, they are interested in "experiencing" their own province.

They are 3 key segments, who have the highest potential to travel to Ontario "staycation", sporty outdoors types, camping and picnics and leisure seeking retirees. They love the outdoors and spending time together with their families and friends. They are interested in their own cultural history.

Accommodations: camping, RV, hotels. Travel by car and love their TV.

Families with school-aged children to teens, and retirees



Travellers from France are growing in numbers

In 2010, this represented \$541M in receipts, 404,500 overnight trips for the month of June

Quebec is their #1 destination, followed by Ontario

They travel mostly in the summer looking for: beautiful scenery, national parks and protected areas, observing wildlife, exploring vibrant cities that are close to nature, experiencing the country's unique character and local lifestyles, seeing historical and cultural attractions, experiencing aboriginal culture and attractions. They are getting away from their stressful French lifestyle.

Ontario is not well known to the French tourism media and tour operators. Trips taken by one or two adults involve the highest level of activity.

France ranks third highest for Internet usage in Europe.

⁸VFR Tourists in Northern Ontario (RTO 13) A Tourism Northern Ontario Study

5.3 MARKET POSITION

Competitive Advantages of West Nipissing as a Tourist Destination

According to a past issue of Wanderlust Report: There isn't a commodity out there that gets to charge a premium price – unless there are no competitors. When all destinations in a category promote the same experience, none can claim advantage.⁹

It was very clear to the Project Team throughout the consultations that creating a distinctive feature or niche for West Nipissing as a tourist destination would be key. Located on the shores of Lake Nipissing and along the Hwy 17 corridor, 1 hour from Sudbury and 20 minutes from North Bay, in order to attract Tourists from these cities and beyond to visit for the day or to stay overnight, innovative ideas need to be considered.

When a tourist flips through brochures, or visits websites, very little is unique and limited differentiation is created. The market has been driven by prices, cheap travel deals, but travel brands become uninteresting, everything seems comparable. This is why creating differentiation in West Nipissing is so vital to a strong competitive position, and could really solidify the region as a key destination on the map.

Some of the key ideas taken from the consultations are:

- ▶ Our strong French culture, as well as being one of the most bilingual communities in Ontario
- ▶ Rich in history, fur-trade, sturgeon fishing for caviar, forestry, etc.
- ▶ Building on an already strong tourism sector
“Joie de vivre” brand has been well implemented for resident attraction
- ▶ New developments in Minnehaha Bay
- ▶ Waterways including lake access, river corridor and falls
- ▶ Festivals and agri-tourism (Leisure Farms) draw in large amounts of tourists
- ▶ Four-season destination
- ▶ Strong volunteer base, friendly community
- ▶ Quality fishing, hunting, camping, water and outdoor activities
- ▶ Nice sporting facilities (Sports complex and arenas, soccer fields, baseball, etc)

The study identified key opportunities to differentiate West Nipissing from other Northern Ontario communities, the recommendations for the Long Term Action Plan will take them all into consideration. A strong position in the tourist destination market is key for the tourism industry in West Nipissing. This position in order to be authentic, needs to be grounded in history, truth to create a meaningful differentiation.

West Nipissing has what it takes to build on what is already present in tourism as well as to differentiate themselves from other destinations with innovative and expanded branding of their unique culture, activities, people and natural attractions.

⁹Travelindustrywire.com : Tourism Branding for a competitive advantage



6 - IMPLEMENTATION

West Nipissing's Long Term Action Plan provides a roadmap to assist the Municipality and its stakeholders in moving forward with the implementation of recommendations to ultimately enhance its tourism products and services. This will result in creating sustainable economic benefits from tourism through the adoption of a continuous process of aligning, linking and leveraging assets and partners over the long term. Implementation can only occur through partnerships, dedication and a focused approach to accomplishing the end goal. This can only be achieved by combining resources and inviting industry to the table to actively work together towards growing the sector.

6.1 THE MODEL

There are a variety of models and methods through which communities approach tourism development. While larger municipalities typically have dedicated tourism departments, budgets and staff, smaller communities either incorporate the sector as part of their overall economic development program or work with partner organizations and local DMO's to undertake marketing initiatives, with little focus on product development or investment attraction. Unfortunately, in many cases communities aren't in a position to dedicate time to the sector and do very little to develop or promote tourism within their area due to lack of human and financial resources. This is a common occurrence in Northern Ontario and has proven to be the case for West Nipissing.

While models may differ, a common element among all communities is the need to seek funding to enable a collective strategic tourism program to grow the industry. It is imperative that the Municipality of West Nipissing work with its partners towards a proactive and sustainable solution to ensure that the recommendations found within the Long Term Plan are implemented. As a means of addressing this challenge, it is recommended that the following model be investigated, adapted and adopted at the local level to ensure community wide buy-in and that affected stakeholders play a role and benefit over the long run.

With the support of industry partners, the proposed model provides an opportunity to build a dedicated tourism entity: Tourism West Nipissing. Based on a partnership model whereby costs are shared among all stakeholders, the community can invest in the future of the industry, thus increasing the probability of implementing the Long Term Action Plan and achieving the desired outcomes identified at the outset of this project.

The foundation of the model consists of implementing a tourism development fund across West Nipissing which will result in building both financial and human resources dedicated to the sector while reducing the burden to Municipal budgets and staff.

In 2012, MTCS informed the tourism industry that the Ministry supports the industry's initiative in developing marketing fee programs, and allowed the flexibility to implement programs as they see fit.¹⁰ In the case of West Nipissing this would consist of a Tourism Development Fund (TDF) enabling the community to leverage locally generated funds for the purpose of implementing the Long Term Plan and further growing the tourism sector. The proposed model provides a mechanism to leverage resources and take a focused approach to tourism development.

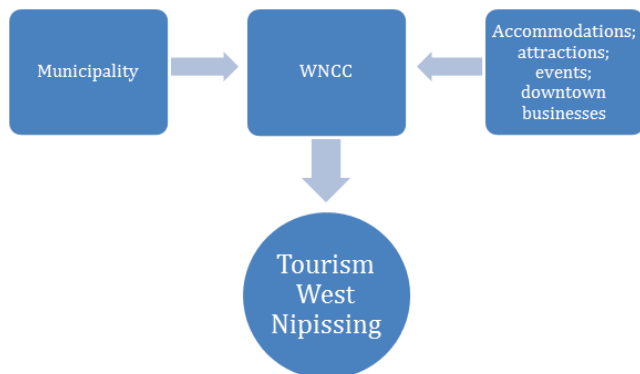
Many communities throughout Ontario collect a tourism levy. These can vary anywhere from \$1/room for accommodations, to up to 3% on all attraction tickets and room nights. For instance, in Sault Ste Marie, the annual collection is upwards of \$700,000 and is used for promotional purposes and product development for attractions like the Agawa Canyon Tour Train and the Essar Centre.

In West Nipissing, a TDF built with partner contributions could generate upwards of \$85,000 annually which could be utilized to hire a full time staff person mandated to support the implementation of the Long Term Action Plan and ensuring the growth and sustainability of the TDF. The Long Term Action Plan includes numerous recommendations tied specifically to the downtown including re-instituting the CIP and the implementation of a comprehensive wayfinding strategy – all of which will not be possible without dedicated human resources. Given the proposed role of the individual in question, it may be an opportune time to revisit the concept of a BIA or similar entity which could be instituted as part of the existing mandate of the Chamber of Commerce.

¹⁰http://www.mtc.gov.on.ca/en/invest/destination_marketing.shtml

Proposed Model for Tourism West Nipissing

The Tourism West Nipissing concept combines elements from the recently established Tourism North Bay model, the City of Greater Sudbury's Sudbury Tourism Partnership model and the former Sturgeon Falls BIA.



In North Bay, the funds collected for their tourism development fund which is dubbed a Tourism Infrastructure Fund, are sourced through a 2% hotel contribution on all room nights, a percentage of dollars generated through attraction and event ticket sales, a set per seat amount for participating restaurants and an annual City contribution. The fund is administered through the North Bay & District Chamber of Commerce and overseen by a committee made up of industry representative.

The program and day to day operations are managed by a dedicated Tourism Manager who is responsible for program development and implementation.

Sudbury's funds are provided through a preset amount based on number of rooms per accommodation and a set annual contribution from attractions and events which are added to the City / GSDC budget for tourism development. The program overseen by a committee of industry representatives and is managed by Greater Sudbury Development Corporation staff.

The former Sturgeon Fall BIA was a formal, provincially and municipally recognized BIA that worked to improve and promote the downtown. This included beautification, support of relevant events and shop local campaigns. Funds to support BIA initiatives were collected through an obligatory member contribution.

Given the lack of human resources currently available at West Nipissing's Municipal level that can dedicate the time and effort that will be required to successfully implement the Long Term Action Plan, it is recommended that the lead for tourism for the community be the West Nipissing Chamber of Commerce. The following provides a synopsis of the proposed partnership including all players and respective roles.

PLAYER	ROLE
Tourism West Nipissing	Comprised of accommodations operators, restaurants, events, attractions, the Municipality and other relevant partners in West Nipissing, Tourism West Nipissing will work with the WNCC to establish a TDF that will generate revenue for a sustainable approach to building and implementing the Long Term Plan. The participants will hold regular meetings, participate in a yearly Strategic Planning session and provide the Tourism Officer (see below) with a mandate.
West Nipissing Chamber of Commerce (or other relevant registered not for profit partner)	Will oversee the administration of the TDF on behalf of the participants, collect the TDF and maintain a dedicated account in a chartered bank. WNCC (or other) will also provide working space and management for the Tourism Officer who will support the implementation of the Long Term Plan.
Municipality of West Nipissing	Will provide annual funds towards the project and promote the TDF. Participate on the West Nipissing Tourism committee and assist / support the implementation of the Long Term Plan,
Local accommodations; attractions; downtown businesses; events	Provide annual funds towards the TDF. Provide intelligence and participate on the West Nipissing Tourism Committee.
Tourism Officer	The Tourism Officer will focus on implementing the Long Term Plan. Also included in the job description: maintain the budget, build regional partnerships, produce an annual plan and promote the growth of TDF partnerships.
Advisory Partners	Tourism West Nipissing will capitalize on the knowledge and experience of organizations like Tourism North Bay, Tourism Sudbury, NEONT, NB TNO, EPSEWN and LMG.

6.2 SUSTAINABILITY

The TDF will take some time to build and develop and will require significant effort on behalf of both the Municipality and the Chamber of Commerce to get off the ground. A Communication Plan/Awareness Campaign outlining the benefits that can be generated through such a partnership will be essential in garnering support from all stakeholders. Although it will be challenging in the initial development phase, once successes are achieved and recommendations begin to be implemented, partners are more likely to join the program as they will better understand the opportunity and how they stand to benefit.

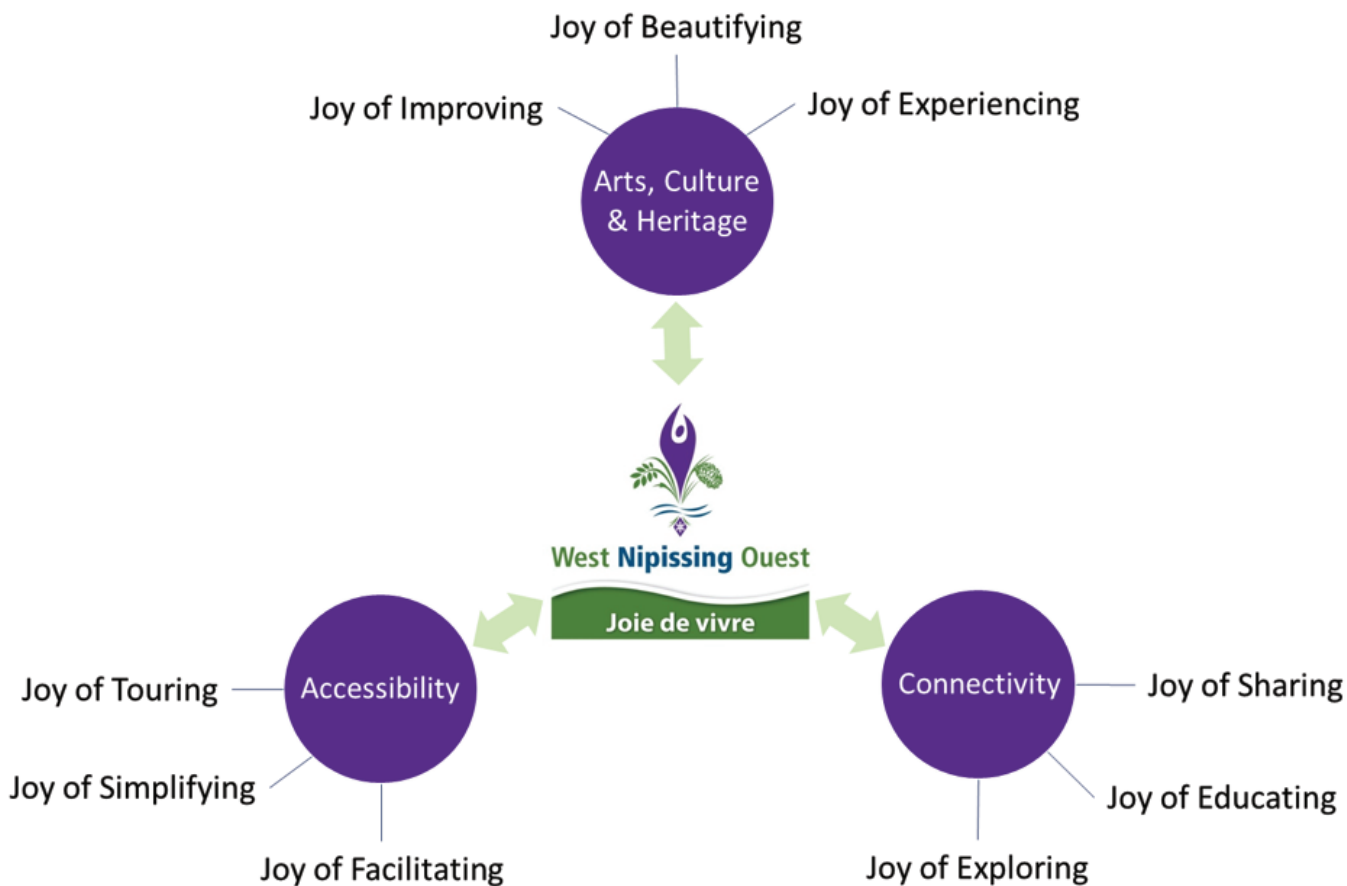
A high level budget estimating potential partner contributions is provided in the chart below. It should be noted however that these are guidelines to provide an example of the potential revenue that could be generated via a TDF program. Also to be noted is the potential to leverage these funds against regional, provincial and federal dollars for bigger ticket projects.

PARTNER	UNIT TYPE	#OF UNITS	ANNUAL \$ /UNIT	REVENUE
Municipality of West Nipissing	n/a	1	\$7,500.00	\$7,500.00
Hotel / Motel	rooms	108	\$20.00	\$2,160.00
Cabins / cottages / lodges	cabins / beds	245	\$20.00	\$4,900.00
Campgrounds	tent sites	425	\$3.00	\$1,275.00
Campgrounds	trailer sites	172	\$10.00	\$1,720.00
Restaurants	seats	900	\$10.00	\$9,000.00
Events & festivals	ticket sales	1500	\$3.00	\$4,500.00
BIA Levies	businesses	350	\$150.00	\$52,500.00
Attractions	ticket sales	100	\$3.00	\$300.00
EPSEWN	n/a	1	3000	\$3,000.00
		Total Potential Revenue		\$86,855.00

6.3 RECOMMENDATIONS

Based on the findings from the primary and secondary research including key tourism trends, regional visitation patterns, current community strengths and assets it is very clear that West Nipissing’s best bet approach to developing the sector and attracting more visitors is to fully **EMBRACE** its francophone culture and further build on the Joie de vivre brand. This can be accomplished through a concerted and community wide effort to achieve the goals and implement the recommendations which have been outlined within the Long Term Action Plan.

The following graphic represents goals and key recommendations of the high level plan.



The Municipality of West Nipissing is well situated to capitalize on tourism. The geography, history, and culture of the community provide significant opportunities for tourism development in the coming years. At present time, most tourism market segments in Canada are in an upward swing and this is expected to continue over the next number of years. West Nipissing has the unique ability to serve tourists, not only as a service center for the region, but more importantly as a tourist hub for the surrounding area. The short list opportunities outlined in the Long Term Action Plan have great potential and require further investigation and planning by entrepreneurs and community representatives in order to reach their full potential on the tourism market.

West Nipissing’s proximity to the larger tourism markets of Sudbury and North Bay means that creating a clear competitive advantage is necessary to differentiate the region. There are a number of ways in which the community can achieve a competitive advantage. Many of these ideas have been outlined in the Long Term Action Plan and can be achieved through product development and marketing initiatives. Please reference the Long Term Action Plan for Communications Plan, Process Map and implementation techniques to support this initiative.

To foster investment attraction and target businesses that would complement the overall recommendations, it is suggested the following types are developed to enhance the downtown core. This can be accomplished through formalized investment attraction strategies or by promoting entrepreneurship within the community and working with entrepreneurs through business start up and expansion.

Places that sell food with locations to eat-in and/or public gathering spaces for eating outside

French cafes, bistros, crepe stands, pastry shops, speciality foods

Destination/speciality retail shops

Galleries, antiques, collectibles, books, clothing, home accents, outfitters, brand-specific businesses, garden specialities, kitchen stores, etc.

Places open after 6:00 p.m.

Entertainment, theatre (movies, performing arts), bars & pubs, speciality shops, dining, open air markets

6.4 KEY PERFORMANCE INDICATORS (KPI)

To guide the implementation, the following KPI can help monitor and determine if the implementation process is successful:

- New events;
- Infrastructure improvements;
- Enhanced reputation;
- Increased visitation, expenditures and yield;
- Improved employment opportunities;
- Local business opportunities / new businesses;
- Growth and stability;
- Increased publicity;
- Continued economic diversification;
- New investment (internal / external);
- Favourable reviews on social media; and
- Increased web presence.

6.5 FINAL THOUGHTS

Armed with the information provided within this report and the accompanying Long-Term Action Plan, the Municipality of West Nipissing is well positioned to work with its partners to grow its tourism sector. Once specific actions have been identified and implemented, marketing materials that highlight key elements may be developed. It is important that marketing material is not developed before the Joie de vivre product is ready, otherwise it may not accurately reflect the visitor's experience once they arrive.

It is recommended that before developing the marketing collateral, banners, displays and social media tools, 'quick product development wins' identified in the Long-Term Action Plan are implemented to build momentum and ensure quality product is developed. Moving forward, the key is to maintain momentum, stay focused on the end goal and take action.