

ONTARIO TOURISM STRATEGY



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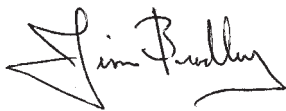
It is with great pleasure that I present the Ontario Tourism Strategy. This Strategy is a long-term, innovative plan for the sustainability and growth of Ontario's tourism industry.

In 2002, the Ministry of Tourism and Recreation, in consultation with our stakeholders in the tourism industry, identified the need for a strategic plan to ensure its continued competitiveness. Over the past two years, the Ontario Tourism Strategy has grown out of these consultations, and I would like to take this opportunity to acknowledge the tremendous contributions that our partners in the tourism sector have made to its creation. Your co-operation and your valuable input have helped us to draft an excellent plan to revitalize and strengthen Ontario's tourism industry.

This document responds to the need to focus the province's diverse tourism industry to develop a strategic, long-term plan for tourism. The framework identifies areas for action through to 2010 – some for the government to implement, some that the industry can work on and some that will require a partnership among several players in the tourism industry. This document is the first step in identifying what action will be taken – not just by my Ministry, but also with the help of operators, tourism and cultural associations, other provincial ministries, destination marketing organizations and other levels of government.

The next step is to develop a detailed implementation plan. As the plan evolves, the Ministry and our partners will jointly determine priorities, establish roles and responsibilities, timeframes, resources and methods to make this Strategy work for tourism in Ontario. All stakeholders in the tourism industry will be important partners in the success of the Strategy.

There is still much work to be done. I know that with strong leadership and enthusiastic support, we can achieve the goals of the Strategy and create the best possible experience for all our visitors in a welcoming destination – Ontario!



Jim Bradley
Minister of Tourism and Recreation

Tourism has a vital role to play in the continuing economic success and development of Ontario and makes a significant contribution to the economic and social vitality of the province.

The tourism sector faces a number of serious challenges, however, some external and others are intrinsic. The sector has tremendous potential to enhance job and wealth creation in Ontario, while contributing to the quality of life for all residents. Strong action and leadership are required if the potential of economic and social benefits are to be fully realized.

T O U R I S M D E F I N E D :

- one or more nights away from home, or a day trip of over 40 km
- includes foreign and domestic travellers
- includes many industries, e.g. accommodation, attractions, food and beverage, recreation, culture, entertainment, transportation, retail

The Government of Ontario recognizes the economic importance of tourism and its role in contributing to an innovative economy and increasing the quality of life of Ontarians. There are many opportunities to take advantage of the worldwide growth in the tourism market. This document provides a future-focused framework for maximizing the potential of tourism in Ontario.

This document outlines an industry-wide strategy based on input gathered from stakeholder consultations in late 2002 / early 2003 and a comprehensive analysis of the issues and opportunities facing the sector. This Strategy presents and outlines the proposed vision, goals and strategic framework for the Ontario Tourism Strategy.

O N T A R I O T R A V E L :

- almost 130 million people visited Ontario in 2002
- Ontarians' domestic travel accounts for 75% of the total
- about \$17.9 billion spent by visitors
- Toronto and Niagara account for almost 30% of the visits

Recent Tourism Trends in Ontario

There is considerable evidence of serious issues facing Ontario's tourism sector:

- Although the number of international visits to Ontario has been rising, our share of worldwide international visits has been declining, from 2.6% in 1980 to 1.8% in 1990 and 1.4% in 2000.
- Toronto was already losing market share prior to 9/11 and SARS. Investment in new attractions has been lagging, although recently announced cultural investments in the Opera House, ROM and AGO could help to reverse the trend.
- Ontario's international tourism deficit in 2003 was \$3.7 billion, indicating that Ontarians spent more abroad than travellers spent in Ontario. The deficit has been growing since 1998.
- Research shows that there is very low awareness in the U.S. of travel opportunities in Ontario. Ontario barely registers in the minds of international travellers.
- In a business climate that is increasingly dependent on information technology, less than two-thirds of Ontario's tourist establishments had a website in 2002.
- Economic factors such as growth in personal disposable income and the value of the Canadian dollar will influence consumers' decision to travel as well as their choice of destination.

A S N A P S H O T O F T H E S E C T O R :

- 150,000 tourism-related businesses in Ontario representing almost 1/5 of all businesses in the province
- nearly half of tourism operators are small and medium sized (between one and four employees)
- 90% have 20 or fewer employees
- the tourism industry stood seventh in foreign currency earned
- arts, culture, heritage, festivals and events (typically operated by not-for-profit organizations) are important tourist attractions; spending by visitors who attended these attractions accounts for 30% of total visitor expenditures.

■ Challenges Facing the Sector

Ontario's tourism industry faces serious challenges in the future:

- Tourism has been severely damaged, most particularly in Toronto, due to external events such as 9/11 and SARS.
- SARS, and the perception and reality of border crossing delays coupled with security issues, continue to negatively affect travellers from the U.S.
- In a world full of travel choices, quality and service are extremely important considerations for many travellers.
- Research suggests that an aging population will result in a reduction of domestic travel, as outward trips, particularly to warmer climates in the U.S., will grow.
- In the next quarter-century, the proportion of adult Ontarians born outside Canada is projected to increase substantially. Research indicates that recent immigrants have a lower rate of travel in Ontario.
- There are labour market issues at both front-line and management levels in terms of pay levels, labour turnover, career advancement, poor image and skill development.
- There are transportation issues (gridlock, lack of public transit, connections between destinations) across the province that act as barriers to smooth travel for tourists.
- The business climate is not conducive to growth, as evidenced by very low rates of investment, cost pressures on operators (e.g. insurance, utilities, property taxes), cost pressures on their customers (e.g. fuel prices, domestic air travel prices), and other barriers to a strong market (e.g. regulatory, access to capital).
- Not all local communities embrace tourism, even though tourism can bolster their local commercial activities and services, and support the regeneration of urban and rural areas.
- Tourism interests need to be balanced with environmental principles.
- The tourism industry is fragmented, widely dispersed across the province and spread across a variety of industries. This structural situation impedes the industry's development, as it lacks the capacity to act with a strong single voice on common interests. Further, the focus in the industry tends to be on marketing what already exists, with less emphasis on research-based development of new products.

The industry, as presently constituted, is not well-positioned to to surmount the challenges. However, the events of the past years have greatly increased the awareness among the public and decision makers of the importance of tourism to many communities and to Ontario's economy. A number of alliances have been developed to respond to these events that hold promise for a strengthened industry. Nevertheless, for tourism to regain its position as a thriving economic sector in Ontario, aggressive action is required in order to:

- Refurbish the current tourism products;
- Improve quality and value;
- Enhance the infrastructure that supports tourism;
- Create new experiences that will attract visitors;
- Restore a positive image to the industry to generate pride and influence;
- Develop strong destinations; and
- Raise the awareness of Ontario in the minds of the international traveller.

The Ontario Tourism Strategy is designed to provide a roadmap to guide all stakeholders in a concerted effort to rebuild the tourism industry in Ontario. In particular, the Strategy will help to accelerate the growth of tourism in Ontario by establishing a common vision and framework for action.

In the future...

■ Innovative Operators

Innovative operators will respond to market trends.

■ Welcoming Destinations

Communities will embrace tourism.

■ Great Experiences

Visitors will be satisfied with what they experience in Ontario.

*Innovative Operators, Welcoming Destinations
and Great Experiences Will Make Ontario
the Place to Visit Again and Again*

Goals

- Ontario is an internationally recognized travel destination, renowned for the superior quality of its tourism experiences, attractions and services.
- Ontario is a top competitor in global tourism, with an increased share of the domestic, U.S. and international tourism markets.
- Tourism contributes to economic prosperity and a higher quality of life in communities across Ontario.
- The Government is actively engaged with industry stakeholders, providing coordinated and strategic leadership to ensure the continued growth and vitality of tourism in Ontario.

The Ontario Tourism Strategy envisages a unified approach to the development of the industry. By working together within a common framework, stakeholders can achieve more than they could if each acted unguided and alone.

The Strategy is focused on solutions, designed to respond to the challenges facing the industry. It requires the active involvement of all stakeholders – government can provide leadership in a variety of areas, but government alone cannot be the source of every solution.

There are five strategic directions that comprise the Ontario Tourism Strategy:

1. Embracing a Visitor-First Philosophy
2. Developing Destinations
3. Building the Image and Influence of Tourism
4. Strengthening Strategic Marketing
5. Developing an “All of Government” Approach.

In addition to these five strategic directions, the following key enabling mechanisms provide a solid foundation for success. These enablers are the building blocks that support implementation of the Strategy:

- Infrastructure
- Market Intelligence
- Tourism Investment
- Information Technology
- Business Skills Development

This framework embraces the themes of the consultation process that Ontario’s Tourism Strategy be research-based, market-driven and customer-focused. The strategic directions, together with the enablers, will guide the efforts of all stakeholders in working together to achieve the vision. For each strategic direction, we present a vision / goal statement and a set of actions to be undertaken by tourism stakeholders and / or governments to support the achievement of this goal.

■ Embracing a Visitor-First Philosophy

Everything begins with the visitor, the customer of tourism operators. Operators need to know what motivates their customers to visit, what expectations they have, how satisfied they were with their experiences, and what would trigger repeat visits. Operators also have to constantly attract new visitors by understanding their expectations. Highly responsive and innovative operators can encourage visitors to come for the first time, to stay longer, to experience more and to return again and again.

Everyone involved in interactions with tourists needs to be “customer-focused”, ensuring that visitors receive a quality experience no matter where or when they travel. Customer service orientation by all staff from the front-line to “back-of the-house” is key. Customers assess quality beginning with their initial exploration for information about a travel opportunity, and continue to judge their experience throughout their stay based on every interaction they have. The broader community also has to provide a welcoming face to visitors in order to contribute to a quality experience: visitor-first has to be the philosophy at the border, in the taxi and especially on the street.

Visitors have expectations of quality and need a mechanism that allows them to determine what level of quality to expect. In sum, all stakeholders must recognize the value of providing a quality experience and strive to achieve continuous quality improvement. Indeed, putting quality at the heart of the tourist’s experience can improve a competitive advantage. Word of mouth is one of the most effective marketing tools; visitors who rave about their experiences can influence others to choose Ontario.

MARKET INTELLIGENCE

The needs and wants of the customer will drive new innovative practices. Operators will use research information to keep abreast of new developments and drive innovation.

- Partnerships and networking will be enhanced at all levels to assist in the development and use of research information. Governments, industry associations, local tourism organizations and other stakeholders will all participate.
- New research products will be developed to provide more information at the local level, and more information for operators on visitors’ travel intentions.
- Operators will receive training and assistance on how to use research information and new information products.

- Operators will implement proven mechanisms for obtaining customer satisfaction data.

QUALITY EXPERIENCES

Visitors will have quality experiences when they travel in Ontario in all aspects of their visit. Operators will ensure, through effective staff training, that all their staff have the knowledge and skills needed to deliver quality service.

- Further research will be undertaken to improve our understanding of the key elements of a quality experience for visitors to Ontario.
- Support will be provided to increase the number of communities that are implementing service excellence plans.
- The Ministry of Tourism and Recreation (MTR) will establish a mechanism on the Ontario Travel website (www.ontariotravel.net) to obtain the views of visitors on their experiences in Ontario.
- Strategies will be implemented to increase the uptake of staff training opportunities in the sector.
- Not-for-profit organizations that utilize volunteers will implement best practice approaches for the recruitment, orientation, assignment, monitoring, evaluation and recognition of volunteers.
- Minimum quality standards will be established for operators' participation in government programs.

QUALITY RATING SYSTEM

A credible quality rating system will be implemented to assist visitors in making informed choices.

- MTR will support an accommodations ratings system as the first step to ensuring ratings are available within the tourism industry.
- Rating systems for restaurants and attractions will be investigated.

■ Developing Destinations and Experiences

Ontario is not homogeneous in terms of its tourism opportunities.

Not only is there a wide range of different destinations, but within many of those destinations are diverse experiences e.g. outdoor activities, urban entertainment, indulgences, culture and heritage, and town plus country.

Under this tourism strategy, the industry will build tourism “from the ground up”. Tourist destinations will be identified based on natural tourism assets, recognized geographical icons and realistic customer travel patterns, rather than municipal boundaries. Development of tourism products will be based on the strengths of a destination, stakeholder willingness and interest in tourism, and opportunities to bring authentic experiences to the marketplace.

Some areas have stronger opportunities for tourism than others. The priority will be to focus opportunities for growth and development on destinations that have the potential to become international icons. At the same time, the province has a wealth of tourism destinations with many varied and different needs. These will be recognized and planned for in the development of tourism in those areas.

- Toronto and Niagara are already recognized as international travel icons.
- Toronto is Canada’s largest city and is said to be the most diverse, multicultural community in the world.
- The Niagara Region has the benefit of one of the “Natural Wonders of the World” in Niagara Falls, a growing wine industry and wealth of natural amenities.
- In order to strengthen tourism in Ontario, other destinations that have the potential to become international icons will be developed.

Research into consumer needs and travel trends will help to identify emerging opportunities. Visitors continue to seek out new experiences and this is recognized as a key travel motivator. The industry will continue to build on its strengths in developing these new experiences, which will help to provide points of differentiation for destinations in a very crowded tourism marketplace. This will help to create new images for the province in external markets. Developing destinations will help to diversify the tourism portfolio so that downturns in one area may be buffered by strengths in another.

Municipalities will be encouraged to play an active role in planning for tourism as part of their economic development strategy.

Tourism planning at a destination level will involve a variety of components including local research, assessment of current assets, product and experience development, training requirements, infrastructure investment, technology needs, and marketing and promotion. To be fully effective, it will require collaborative efforts by local stakeholders and all levels of government.

DESTINATION PLANNING AND DEVELOPMENT

Rigorous tourism planning will help to create visitor-friendly communities, new tourism products and opportunities for additional investment in vibrant destinations. Tourism planning and development will involve all local stakeholders including operators (private, not-for-profit, government), training organizations, governments and others.

- MTR, in consultation with the industry, will identify five or six icon destinations. The Ministry will work with these destinations using the Premier-ranked Tourist Destinations Framework© to identify priorities that have potential for further development, and will support the implementation of tourism projects in these destinations.
- The Ontario Government will work with municipalities and First Nations to identify the tourism potential for economic diversification in their communities.
- Opportunities for experiences that cross destination boundaries and occur in a variety of locations (such as paddling, spas and Doors Open) will be recognized and linked where appropriate.

ONTARIO GOVERNMENT'S ATTRACTIONS

The Government's attractions and agencies will be strong magnets attracting many visitors. They will be catalysts for the development of tourism champions in their communities.

- The Government's own attractions will model best practices as innovative organizations.
- They will take an active leadership role by stressing the importance of tourism in their communities, participating in destination planning, working with others in marketing and promoting career choices in tourism.

- Through long-term capital planning, provincially funded attractions will be revitalized to be key assets in attracting tourists to their areas.

PRODUCT DEVELOPMENT

Existing products will continuously be renewed in response to visitors' expectations. New products and experiences will be developed where research indicates promise.

- Research and visitor-driven product development strategies will be a key component in tourism plans.
- Industry associations and government will provide advice and support to operators on the development of plans to improve existing products to meet visitor expectations.
- Support will be provided to sustain and evolve current festivals and events as appropriate and to identify opportunities to develop new ones that build on a destination's strengths.

NORTHERN EXPERIENCES

Northern tourism experiences will be developed based on natural and cultural assets, and outdoor/wilderness opportunities.

- MTR and the Ministry of Natural Resources will work with stakeholders to enhance tourism opportunities on Crown lands and waters.
- Tourism will be a critical part of any northern economic development strategy.
- The potential of aboriginal products and experiences will be developed while maintaining the integrity of the cultural assets.

T O R O N T O A N D N I A G A R A C O L L A B O R A T I O N

Greater collaboration between Toronto and the Niagara Region will strengthen them as destinations and major gateways for tourism in the province.

- MTR will encourage greater collaboration among industry leaders and municipalities in these destinations in order to facilitate the development and implementation of a “joint tourism agenda”.
- Support for product development and marketing will be based on long-term tourism business plans, innovative partnerships and priorities established for this area.
- As the City of Toronto and Region of Niagara together attract almost 30% of tourists to Ontario, they act as gateways for tourism to the rest of Ontario. Toronto and Niagara Region will work with other regional destinations to improve visitors’ experiences and extend their stays throughout the province.

■ Building the Image and Influence of Tourism

Tourism has not traditionally been recognized for its important economic, social and cultural contributions. Tourism supports the economic development of many communities in Ontario. The richness of experiences in Ontario – arts, cultural, leisure and many others – is enhanced by tourism. Our history and heritage are maintained and celebrated in part through tourism.

Recent occurrences such as 9/11 and SARS demonstrated the economic consequences of a weakened sector. Nevertheless, there is still a need for tourism to impress upon the public at large, governments, business decision-makers, investors and potential employees about its importance and its contributions to the quality of life in Ontario. Small operators need to understand their role in the bigger tourism picture and recognize their importance in contributing to the quality tourism experience travellers want. The industry needs strong advocacy organizations that will act more collectively where necessary in the best interests of tourism at large.

There are sometimes tourism-related problems in local communities such as traffic congestion, noise, and waste. These need to be addressed in ways that meet the concerns of residents while maintaining a tourism-friendly approach.

COMMUNITY SUPPORT

Communities recognize the importance of tourism and how it contributes to economic and social development and the quality of life in local communities.

- Industry associations will develop and implement a fact-based awareness campaign to promote the importance of tourism to municipalities.
- Operators and Industry Associations will work with communities and each other to resolve local tourism-related issues.
- MTR and its partner ministries will work together with stakeholders to develop synergies between tourism and other resource-based industries.

WORKING IN TOURISM

The tourism industry will be seen as a valuable source of work experience with interesting and rewarding careers and opportunities for volunteer involvement. Educational institutions will help to promote careers in tourism and to prepare individuals for jobs in the industry.

- The Ministry of Education will work with its educational institutions to promote work experience and career paths in tourism.
- The Ministry of Training, Colleges & Universities will work with its educational institutions to strengthen training opportunities for new entrants and for current tourism industry staff.
- Industry associations will undertake initiatives to promote work experience, volunteer opportunities and career paths in tourism.
- Industry associations will promote the potential for part-time, youth and older workers to participate in the tourism labour force.
- MTR will develop stronger working relationships with faculties of tourism and hospitality.
- The importance of immigration as a source of employees will be recognized.

A NEW ROLE IN PUBLIC POLICY FOR INDUSTRY ASSOCIATIONS

Strong industry associations will enhance their capacity to develop and communicate public policy positions.

- Industry associations will work together to provide a common voice for the sector in matters of policy and proposals to overcome barriers to a stronger sector in Ontario.
- Associations will engage their membership on questions of public policy.

**CELEBRATING BUSINESS INNOVATION
AND QUALITY**

Excellence will be valued, recognized and rewarded.

- Industry associations will promote the importance of tourism and best practices to their members.
- Industry recognition programs will include innovation and quality.

Strengthening Strategic Marketing

Ontario must compete with a wide variety of travel destinations in attracting travellers, who, in the 21st century, have many exciting and interesting choices. Nearby destinations such as Quebec, New York and the New England States have significant budgets to attract tourists. Ontario is within easy reach of many such travel destinations and its residents are targets for their marketing efforts. At the same time, Ontario faces competition from destinations further afield such as Florida, California, Las Vegas, London and Paris, all of which have substantial marketing budgets. In such a crowded marketplace, Ontario faces stiff competition in standing out as a “top of mind” destination.

Consequently, effective marketing is a key element of Ontario’s Tourism Strategy, and will be fully connected to the vision and other elements of the Strategy. Marketing will be strategic and forward-looking, and will help to create the “personality” of Ontario. Marketing will support the unique strengths of destinations and at the same time reflect experiential products that span destinations. Marketing will help to create a variety of identities in the minds of potential travellers to Ontario.

Marketing will be research-based, driven by what visitors need, and reflecting the products and experiences that have been developed based on market trends. Marketing plans will be multi-year and opportunistic, anticipating new themes and emerging markets. Marketing will be well integrated, from the first point of contact through to the visit and beyond. Evaluation of marketing approaches will be ongoing through outcome research, providing the data necessary to adapt and change as required.

Marketing will be undertaken by a variety of stakeholders in a coordinated fashion, including the province, destination marketing organizations, experience-based coalitions, and individual operators. Leadership for marketing will be provided by the province to ensure a competitive, focused, coordinated, and evaluated approach. It is recognized that operators also have their own interests, that can be enhanced through improved customer relationship management. At the same time, operators can also help each other through collaborative ventures.

PROVINCIAL LEADERSHIP IN MARKETING

Marketing will be strategically focused, research-based, visitor-centred and will create the “personality” of Ontario and clear destination identities.

- MTR will lead the development of a multi-year strategic marketing plan that will complement this tourism strategy in an integrated and comprehensive way.

- MTR will work with federal and provincial government offices and the Canadian Tourism Commission in international locations to encourage travel to Ontario.
- A provincial marketing strategy will:
 - look at strengthening Ontario’s brand to help re-position Ontario in consumers’ minds;
 - build strategic marketing partnerships with public and private sector tourism related marketing organizations to maximize marketing efforts;
 - implement new innovative and highly targeted marketing tactics including public relations, tourism marketing and event-based initiatives;
 - increase U.S. and overseas marketing efforts as these markets recover; and
 - utilize consumer research to inform marketing decisions and confirm results.

STRENGTHENING DESTINATION MARKETING

Local and regional destination marketing will continue to play an important role in driving tourism.

- MTR will work with the industry to investigate options that enable a more sustainable model for destination marketing.
- Local and regional destination marketing will be coordinated with provincial marketing efforts.
- MTR will work with industry to investigate structural models to support destination marketing.

VISITOR SUPPORT SERVICES

Visitors will obtain information and be able to make bookings when, where and how they want to do so.

- Operators will embrace technology and use the internet to provide travel information, bookings and customer relations management.
- The province will model the use of the internet for customer information at its travel information centres and will advocate for technology use by operators.

- Operators will be encouraged to develop long-term relationships with visitors via online communications, incentive marketing, special events invitations, and other means to encourage return visitation and product loyalty.
- Industry associations and local tourism organizations will assist in building the on-line capacity of their members.
- Ontario’s travel information centres will be renewed to create a more welcoming environment, providing more modern multi-purpose centres, access to up-to-date information, and new services and amenities, in partnership with the private sector.
- Visitors will experience seamless “end-to-end” services.

■ “All of Government” Approach

The tourism strategy will guide all provincial activities related to tourism. MTR will lead a planned approach to tourism both within the ministry and within government. Other ministries will take responsibility within their own mandates for the development of policies and implementation of initiatives that support tourism as described in this Strategy. MTR will represent tourism interests in government decision-making and will be recognized by stakeholders as the leader and policy maker within government on tourism issues. There will be many opportunities to work horizontally across government ministries to achieve the goals of the Strategy. Close collaboration will achieve real results.

By taking this “all of government approach”, the efforts of various government departments and agencies will be better coordinated and more complementary, leading to more effective public investment, greater leverage towards common goals and more clarity for all stakeholders about government roles and responsibilities.

PROVINCIAL INVESTMENT IN TOURISM

The resources available from the province will be deployed in a manner consistent with this strategy, in order to help rebuild the tourism sector and to help maintain its viability into the future.

- All Ministries with a tourism role will adopt this strategy as the guiding framework for their programs that have an impact on tourism.
- MTR will have “lead ministry” status in coordinating the efforts of the government across all Ministries and in providing strategic advice to them regarding their programs and policies that have an impact on tourism.
- The Ministry of Northern Development and Mines (MNDM) will work closely with MTR to ensure that tourism-related programs and services meet the needs of the Northern Ontario tourism industry.
- MTR will report annually on the government’s support for the tourism sector in Ontario.

LAND USE AND ENVIRONMENTAL DESIGN

The value of tourism assets and uses will be recognized in land use and environmental design decisions at the provincial and municipal levels.

- The importance of tourism as an economic generator will be recognized in the Provincial Policy Statements under the Planning Act.
- MTR will represent tourism’s interests in provincial land use discussions.
- MTR will work with the Ministry of Natural Resources (MNR) to integrate and streamline decision-making regarding tourism use of Crown land.
- Municipal governments will recognize quality architectural/environmental design in their official plans as a tourism asset for developing destinations.

OTHER GOVERNMENTS

The Province of Ontario will work closely with other governments to achieve its policy goals, and, in particular, to implement this tourism strategy.

- MTR will work with Industry Canada and other provinces/territories on the development of a national tourism strategy and on its implementation.
- MTR will maintain close liaison with the Federal Government to ensure collaborative efforts in areas of common interest such as policy, research and marketing.
- MTR will work with Crown Agencies such as the Border Agency, Parks Canada and Port Authorities to contribute to a quality tourist experience.
- All Ontario Ministries will take this tourism strategy into account in their dealings with the other governments on issues that affect tourism.
- MTR will work with the Province of Quebec on joint initiatives that strengthen tourism in both provinces.
- MTR will work with interested municipalities to raise awareness of tourism, to assist with destination planning and development, to market Ontario and its destinations and to maximize tourism opportunities.

■ Enablers: Building the Foundations

A strong infrastructure is required to support tourism. Smooth border crossings and welcoming international airports help to start visitors off on a positive note. The ability of visitors to move around easily makes for more pleasant visits, and could contribute to extended trip durations and increase the number of destinations and experiences. All modes of transportation – road, train, air, water, transit – require attention from a tourism perspective. Transportation links between Toronto and Niagara, the province’s two internationally recognized tourist destinations, need to be enhanced. The province borders on four Great Lakes that provide tremendous tourism development opportunities. Indeed, waterfronts are one of Ontario’s major assets; the development of Toronto’s waterfront, for instance, is a key component in Toronto’s strategy to strengthen its attraction as an international tourist destination.

Undertaking the right research is an important building block towards a long-term sustainable tourism industry. In order to sustain and build Ontario’s tourism industry, it is essential that all stakeholders understand who the customers are, what their preferences and expectations are, how they learn about the province’s offerings, what drives their travel decisions, and where they go and what they do if they don’t come to Ontario. It is important to monitor how visitor needs and desires for products, services and destinations are changing and why. Everyone involved in the tourism industry needs to stay in tune with trends, understand visitors’ demands, be aware of the competition, remain flexible and be constantly planning, based on sound information, for future change. Research needs to drive the development of new products and experiences that generate new and repeat visits.

Information technology is a critical tool for businesses of all kinds, most particularly tourism. Travel information is one of the leading uses of the Internet, and Ontario’s operators and other information providers need to be at the forefront in order to meet visitors’ needs and keep pace with the changing demands, trends and expectations of visitors. The development and spread of high-speed broadband capacity is required in all locations to permit every operator in Ontario to participate in the Web-based marketplace. Keeping abreast of new technologies (e.g., wireless communications, GIS systems) and how they can be applied effectively to tourism will remain important.

Furthermore, operators need to have the business skills to plan for change, develop new products and manage their operations effectively. Creating a sound business plan is an essential component of good management. Municipalities also need to develop tourism plans that reflect the assets, capabilities and interests of their communities.

INFRASTRUCTURE

The infrastructure required to sustain and enhance tourism in Ontario will be strengthened and development will be undertaken in a planned and sustainable manner.

- MTR will work with the Ministry of Transportation to promote ongoing investment in highways, regional connecting roads, and public transit to support the tourism industry.
- Ontario will encourage sustainable waterfront planning and development in various communities (e.g. Toronto waterfront, Great Lakes Heritage Coast).
- MTR will take the lead role in ensuring that provincially funded arts, cultural, heritage, parks, sports and other attractions are revitalized through long-term capital planning to be key assets in attracting tourists to their areas.
- Maintaining open, safe and efficient border flows and enhancing first experiences at international airports will be a priority.

MARKET INTELLIGENCE

Research will keep all Ontario tourism stakeholders well informed about trends and issues. Stakeholders will recognize the importance of sound research in product development, marketing, investment and other areas. Decisions will be grounded in the latest information and that information will be comprehensive, understandable and widely accessible.

- Operators, industry associations and municipalities will collect and share information for research purposes. Ontario’s attractions and agencies will be leaders in collecting, using and sharing visitor information.
- MTR will work with stakeholders to determine research priorities.
- MTR will expand its research product range to provide more information on travel motivators and trends in travel patterns, including working with other jurisdictions to undertake another Travel Activities and Motivations Survey (TAMS).
- MTR will assist in the development of research capacity at the local level and will provide tools to operators to enable them to collect reliable customer information from their visitors.

- Greater emphasis will be placed on communicating the results of research and in training operators how to use it in business decision-making for marketing and product development.

T O U R I S M I N V E S T M E N T

Tourism investment opportunities will be identified across the province, and the tourism industry will be promoted to investors and the finance community.

- MTR will work with the Ministry of Economic Development and Trade (MEDT) to promote tourism investment opportunities to private sector investors, both domestic and international.
- MTR will work with MEDT to provide a one-stop shop of on-line information that includes everything from new business immigration and funding sources to a search for tourism business opportunities.
- MTR will work with municipalities to help identify investment opportunities, improve the business climate, develop tools and resources, and promote the tourism industry to financiers and potential investors.
- MTR will develop a customer relationship management system to identify, track and communicate with the top global tourism investment and development firms.

I N F O R M A T I O N T E C H N O L O G Y

Ontario's tourism industry will increase its use of information technology to gain a competitive advantage.

- MTR will work with MEDT to identify how its technology initiatives can enhance the technology capacity of the tourism industry.
- MTR and industry associations will encourage operators to enhance their Web presence for marketing, sales, and customer relationship management.
- Industry associations will investigate software packages for use by their members and the potential for bulk purchases.
- MTR will have the technology capacity to support its services to the industry.

B U S I N E S S S K I L L S D E V E L O P M E N T

Operators will have greater opportunities to improve their management and business skills, thereby enhancing their viability. Business information for operators will be more easily available.

- MTR will work with MEDT to enhance MEDT’s Enterprise Centres’ support for tourism operators, including not-for-profit operators.
- MTR will work with industry associations on how best to provide information on training opportunities to their members.
- MTR will work with the Ministry of Consumer and Business Services (MCBS) to develop a tourism business bundle that provides access to information under one electronic gateway.

By 2010, international tourist arrivals are forecast to grow to 1 billion, and to 1.6 billion by 2020. The World Travel and Tourism Council (WTTC) states that the global tourism industry currently contributes directly and indirectly 10.4% of global GDP and supports 215 million jobs worldwide. The WTTC estimates that this will grow, and that by 2014, global spending on travel and tourism will be 10.9% of global GDP.

There are tremendous opportunities to take advantage of this growth. The Ontario Tourism Strategy is a tool designed to bring the tourism industry and different levels of government together to focus our efforts strategically, and take advantage of the many assets available to sustain and grow tourism in Ontario.

As a next step, industry and government must work together to develop the implementation plan, including roles and responsibilities, and, priorities and timelines. As the details evolve, we will have a clear recognition and focus on what actions are needed to revitalize Ontario's tourism industry and enhance the province as an internationally recognized destination.

This strategy is a living document. Over the lifetime of the Tourism Strategy – until 2010 – the industry and government will monitor progress on implementation, and continue to ensure the Strategy evolves to keep Ontario moving up in the minds of travellers as a destination of choice.