

# 3-Year Strategic Plan

November 2024

resonance

TOURISM  
**NIAGARA**  
CANADA

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# 01 Introduction

# Context

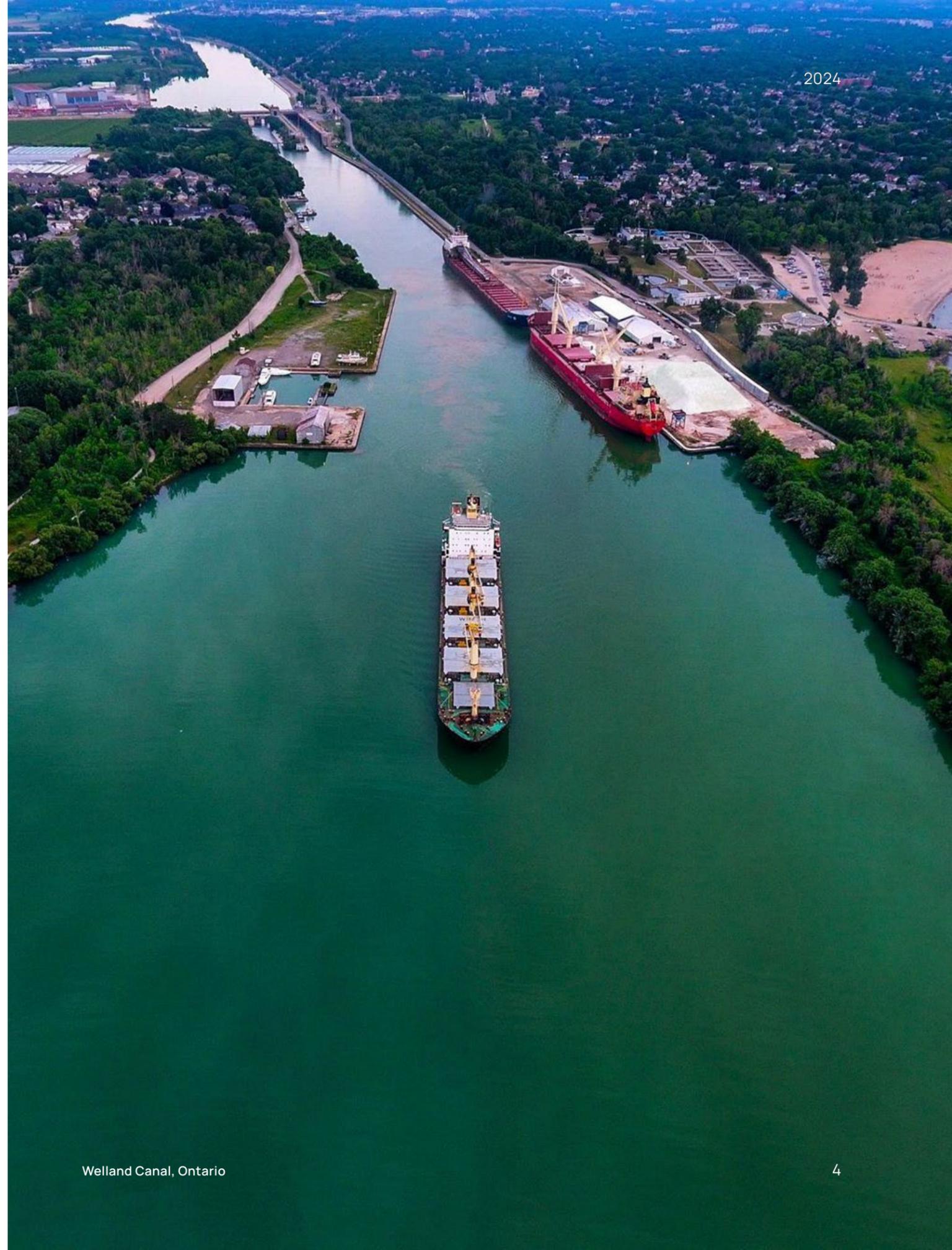
Niagara is one of Ontario's, and Canada's, best known tourism showcases.

Anchored by an internationally known, “bucket list” destination Niagara Falls (and the surrounding park/natural areas), Niagara also boasts an array of wine and culinary, heritage, indigenous, recreation, and retail offerings, Niagara truly has something for everyone.

Our guests range from once-in-a-lifetime, day-trip international tourists to multi-trip, multi-day regional visitors and everything in between. Our tourism marketing and management capacity includes established, well-resourced DMOs as well as a broad range of private- and public-sector operators with decades of experience selling the Niagara experience. We host four international border crossings, three academic institutions with tourism programs, internationally acclaimed events and festivals and significant conference/convention capability. Tourism is recognized, across the region, as playing a leading role in the local/regional economy.

To date, TPN has focused mainly on marketing. In particular, media-heavy, consumer marketing highlighting seasons and seasonal events as well as influencer, online, and related marketing activities. While consumer marketing is important, TPN believes our efforts and resources can be better directed towards gathering and sharing market intelligence, fostering collaboration among key players, and leading (sometimes from the rear, other times at the front) Niagara tourism forward.

This 3-year strategic plan is a change of direction for TPN. Change won't occur overnight. The strategic plan sets out a clear vision for tourism in Niagara, identifies roles and responsibilities for TPN and others, and establishes our priorities and associated key performance indicators.



# Regional Tourism Organization Mandates

The TPN is one of thirteen regional tourism organizations (“RTOs”), set up to develop and deliver: product development, investment attraction/investor relations, workforce development and training, as well as marketing.

RTO mandates recognize the need for action beyond traditional tourism marketing, involving the management of its resources, infrastructure, and relationships.

Where possible and practical, delivery of the RTO mandate and associated strategies should be achieved through partnerships. Effective partnerships involve agreeing on who does what, particularly a clear understanding of who leads and who supports. This strategic plan identifies where TPN is best positioned to lead and where, given resources and/or the presence of other stakeholders, TPN is better suited to support. In either approach though, the strategic plan identifies necessary steps and actions and the associated priority attached to each. and addresses responsibilities and partnership opportunities.



Rainbow Bridge, Niagara Falls, Ontario

# Project Approach

The strategic plan was prepared by Resonance Consultancy in collaboration with the Board of Directors and senior management of TPN.

In preparing the plan, Resonance organized one-on-one interviews with each board member and senior management to gather input on content and priorities. Resonance also hosted focus groups to gather input from tourism stakeholders across the region. The Resonance team worked with external data suppliers to understand core visitor markets, reviewed past business and strategic plans (at the TPN and DMO level) and reviewed extensive documentation on the tourism and broader business/ economic environment in Niagara. These steps provided Resonance with

the platform necessary to frame a vision and follow on strategy.

The strategic plan reflects the requirements for regional tourism organizations as established by the Government of Ontario. More importantly however, the plan takes the Niagara-specific insights gained by Resonance through the fact-finding stage and blends these with proven strategies and tactics employed in multiple other destinations. The result is a Niagara-specific strategic plan, grounded by local input and brought to life through international experience.



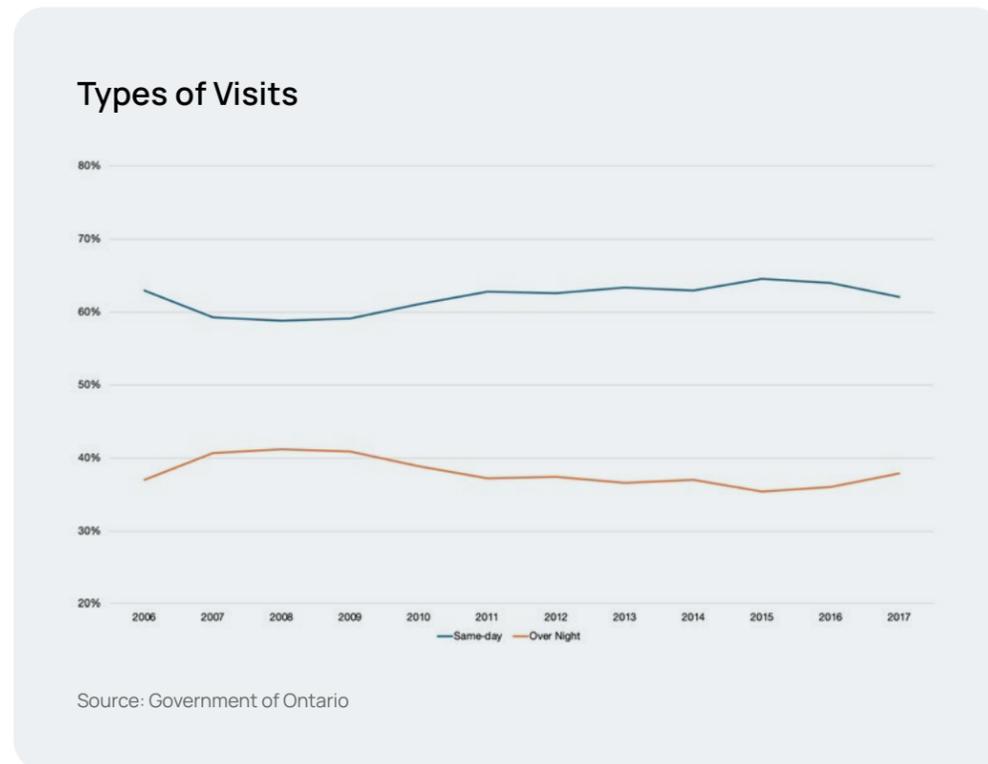
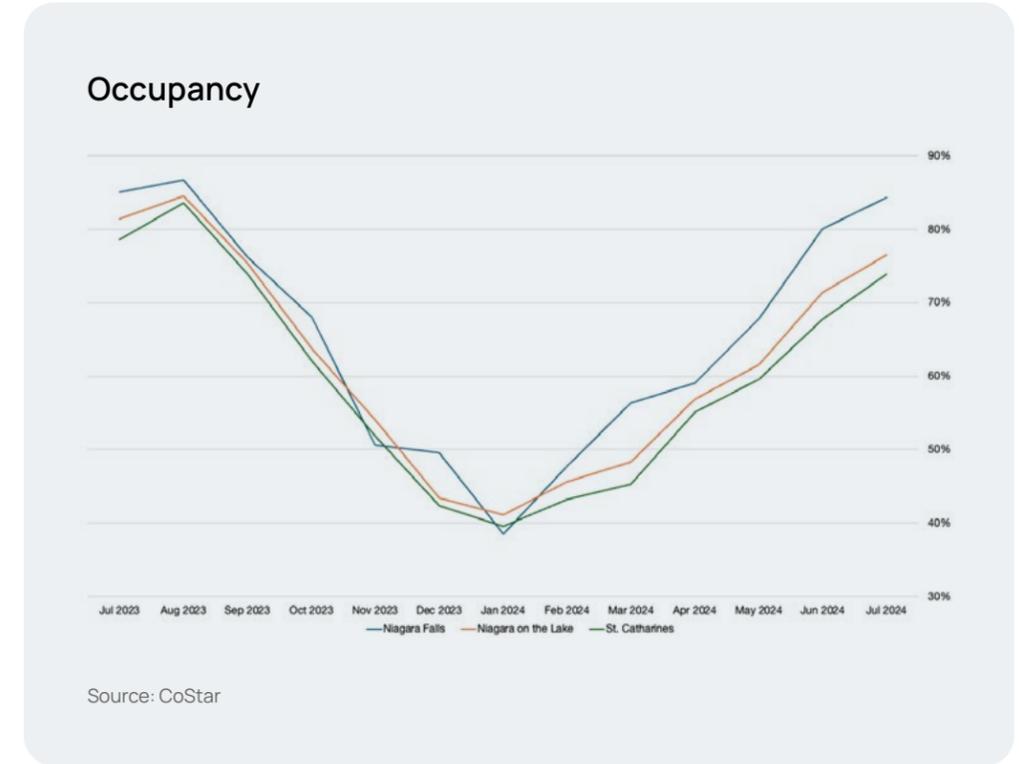
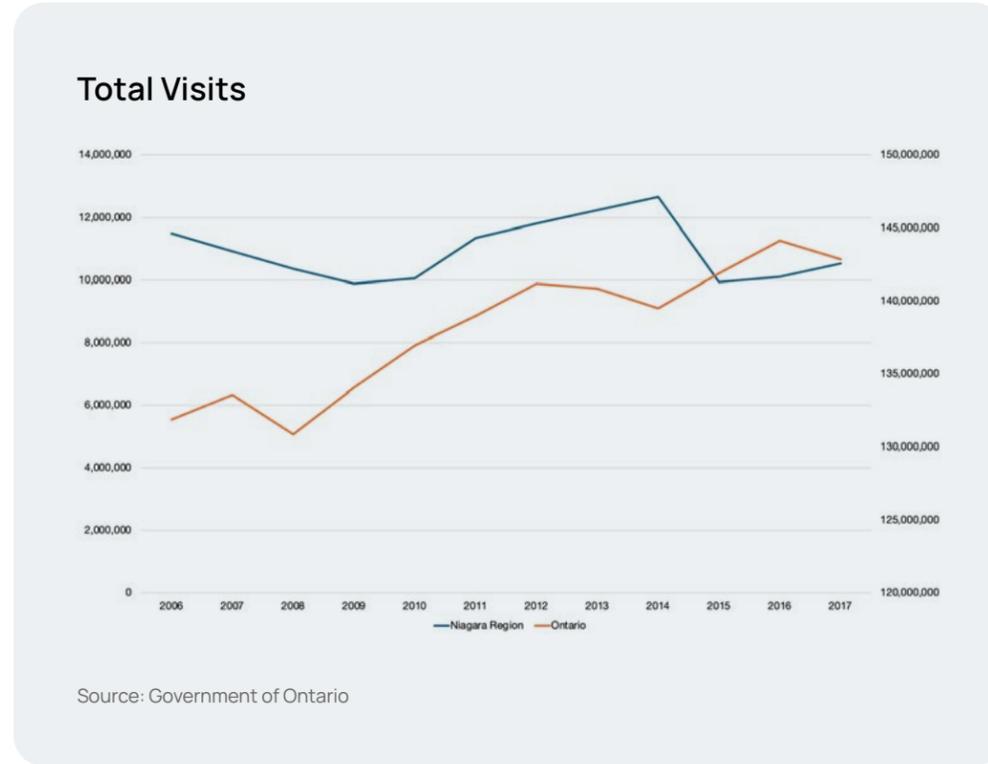
# 02 State of Tourism

# Destination Assessment

## DESTINATION PERFORMANCE

Niagara remains one of Ontario's leading tourism destinations, drawing a substantial volume of visitors annually. In 2017, the region welcomed a total of 12.95 million visitors, including 4.9 million overnight visitors and 8 million same-day visitors according to the Niagara Region. When comparing provincial visits, visitation trends have remained relatively stable in the region, even as overall tourism in Ontario has grown.

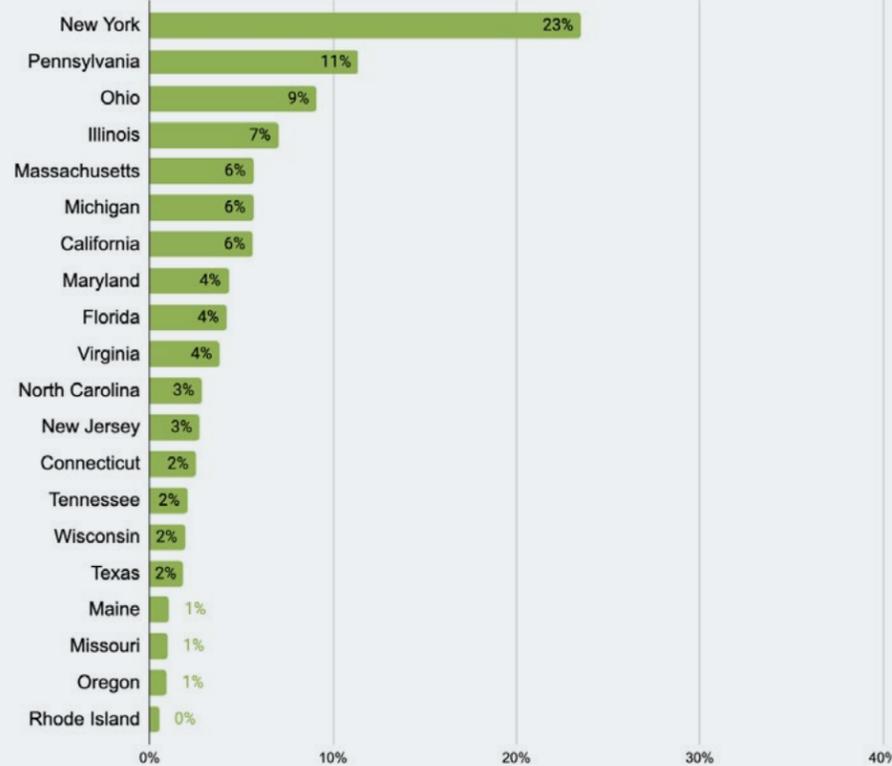
Niagara experiences significant seasonality, as reflected in occupancy rates that peaked at 87% in August 2023 but dipped to 39% in January 2024, underscoring the need to consider seasonal factors in future tourism planning.



## KEY MARKETS

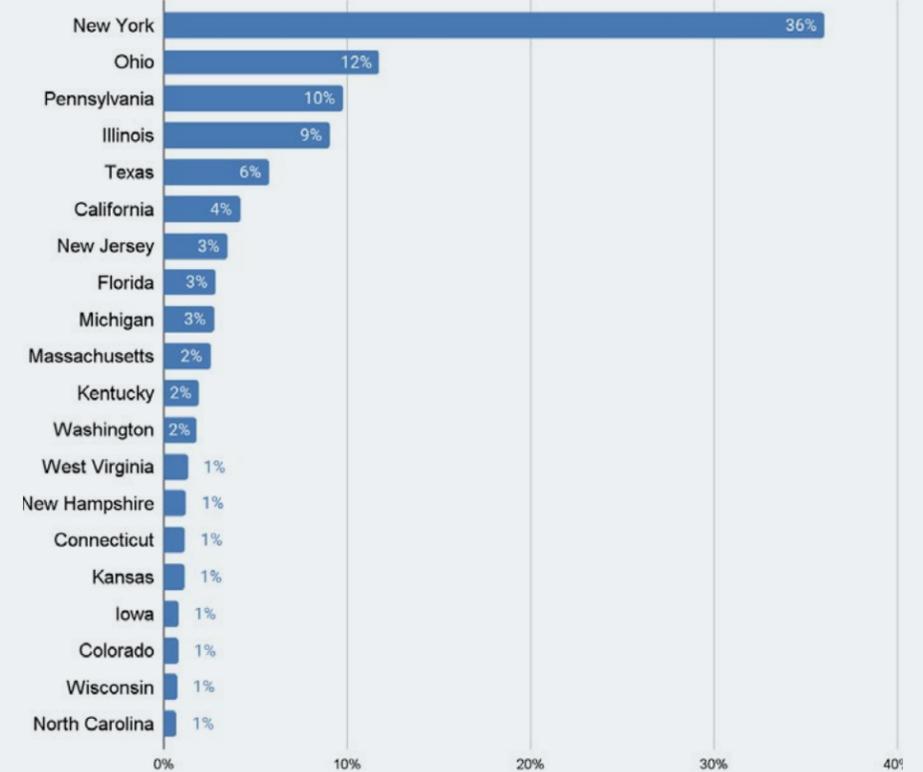
Visitor traffic to Niagara provides a robust foundation for the region’s employment and business landscape. Of the nearly 13 million visitors in 2017, a majority (67.1%) came from within Canada, primarily Ontario, which accounted for 8.4 million visitors. The United States was the second-largest source market, contributing 3.2 million visitors (25%), while overseas travellers made up 8% of the total with 1.1 million visitors. Tourism expenditures in 2017 reached \$2.4 billion, with Canadian visitors contributing 65% of the total, followed by U.S. visitors at 27% and overseas visitors at 8%. This spending profile highlights the importance of both domestic and international markets, as U.S. visitors, in particular, tend to spend more per visit than other demographics.

U.S. Visitors (Apr/Sep)



Source: Environics

U.S. Visitors (Oct/Mar)



Source: Environics



# Economic Impact

Tourism is a critical driver of Niagara's economy, contributing nearly \$2.8 billion in total visitor spending in 2023 according to Destination Canada. Of this, \$1.4 billion came from international visitors and \$1.4 billion from domestic travelers. Spending categories highlight the importance of tourism to various sectors, with food and beverage at 35% of expenditures, recreation and entertainment at 25%, retail at 15%, accommodation at 15%, and transportation accounting for 10%.

Tourism's influence extends beyond direct spending, supporting local businesses, generating tax revenues, and creating jobs across hospitality, transportation, retail, and cultural sectors. The composition of visitors also underscores the region's

appeal across markets. U.S. visitors contributed 38% of international spending, while overseas travelers accounted for 13%. Meanwhile, domestic tourism dominated, with intra-provincial visitors making up 43% and inter-provincial travelers representing 6%.

Tourism supports a substantial part of the regional economy, with 2,824 tourism-related businesses and nearly 40,000 jobs recorded in 2018. This data underscores the significance of tourism as a driver of economic activity and employment, highlighting the sector's role in supporting community well-being and local prosperity.

**\$2.8 billion**  
IN TOTAL VISITOR SPENDING IN 2023

# Stakeholder Perspectives

The following section outlines the key strengths, challenges, and opportunities for the Niagara region’s tourism sector. Drawing insights from stakeholder perspectives, it highlights the region’s existing assets and competitive advantages, as well as the main obstacles hindering growth. Furthermore, it identifies strategic opportunities that can be leveraged to enhance the destination’s appeal and sustainably develop its tourism industry.



Niagara-on-the-Lake, Ontario

## KEY STRENGTHS

**Natural wonder with international reputation**

Niagara Falls has global name recognition, attracting both national and international attention.

**Strong tourism operators**

The region features well-established, marketing-savvy operators with strong financial backing, including wineries, casinos, and attractions like NPC and City Cruises.

**Nature and recreation**

The area boasts extensive natural and recreational offerings, including Bruce Trail, Ball’s Falls, provincial parks, and beach access.

**Variety of tourism product**

Niagara offers a wide range of experiences, from arts and culture (Shaw Festival) to culinary, retail, sports, heritage, nature, and entertainment attractions.

**Local marketing support (DMOs) and associations**

Well-funded DMOs and active industry associations (e.g., wine, arts, and culture) support tourism across key hubs.

**Variety of potential partners**

The region benefits from strong partnerships with academic institutions (Brock University, Niagara College) and national agencies like Destination Canada.

**Tourism (generally) seen as economic contributor**

Regional and municipal governments see tourism as an essential economic contributor.

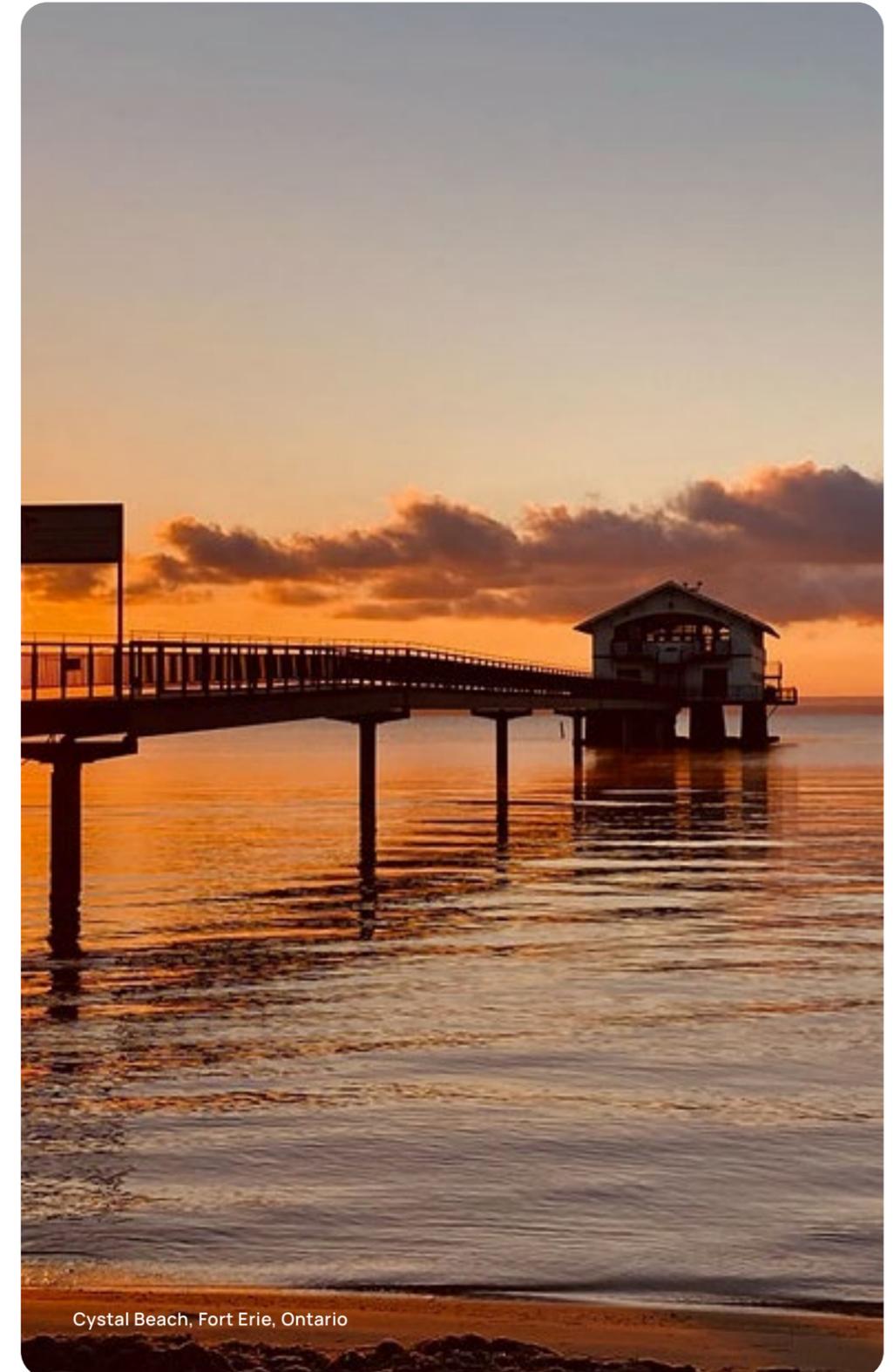
**Gateway from the U.S**

The busiest U.S.-Canada border crossing, with four access points plus rail connections, offers access to a vast nearby American market.

**STAKEHOLDER PERSPECTIVES**

**KEY CHALLENGES**

<b>Transportation &amp; Access</b>	Congestion on the QEW from Toronto and limited alternative travel options hinder access, with in-market transportation also being insufficient.
<b>Limited coordination among key players</b>	Independence and limited collaboration between Niagara communities and DMOs restrict coordinated action.
<b>Changes in Visitor Behaviour</b>	U.S. visitation hasn't fully recovered, and younger demographics exhibit different travel preferences, alongside declining visitor spending.
<b>Target markets vary widely</b>	The region caters to a broad range of visitors, from local day-trippers to international tourists, creating challenges in targeting marketing efforts.
<b>Workforce availability, access and training</b>	Seasonal labor shortages, combined with limited worker mobility, pose challenges for staffing the tourism sector.
<b>Grittiness</b>	Issues like cleanliness, safety, and homelessness in some areas affect the region's image, driven partly by past business practices.
<b>Seasonality</b>	The tourism sector is highly seasonal, with demand peaking in summer and off-season visitation remaining low.
<b>Product (new and renewal)</b>	Limited new attractions have been developed in recent years, with little coordination among regional economic development players.



Crystal Beach, Fort Erie, Ontario



Brock's Monument, Queenston, Ontario

## STAKEHOLDER PERSPECTIVES

### KEY OPPORTUNITIES

<b>Extend the stay/Create reasons for repeat stays</b>	Encouraging longer stays and repeat visits, particularly from nearby markets, could help extend the tourism season.
<b>Define the regional ("Niagara") message</b>	Identifying shared themes could create a unified regional identity, aligning with DMO messaging and enhancing brand recognition.
<b>Coordinate marketing</b>	Improved collaboration on marketing could reduce redundancies and enable more effective targeting of key markets.
<b>Define Target markets</b>	Better segmentation by geography, experience, ethnicity, and event types (e.g., business, cultural, sports) could attract specific audiences.
<b>Use group travel to spread demand</b>	Hosting business, sports, and cultural events could help distribute visitor demand more evenly throughout the region.
<b>Leverage larger players</b>	Iconic attractions like Fallsview Casino, NPC, Shaw Festival, and major wineries can be used to generate greater demand and awareness.
<b>Centralize/share research</b>	Establishing a shared research platform to track visitor demographics and behaviour could improve tourism performance and reporting.
<b>Enhance the visitor experience</b>	Focusing on visitor satisfaction and using personas to shape tailored experiences would elevate the region's appeal.

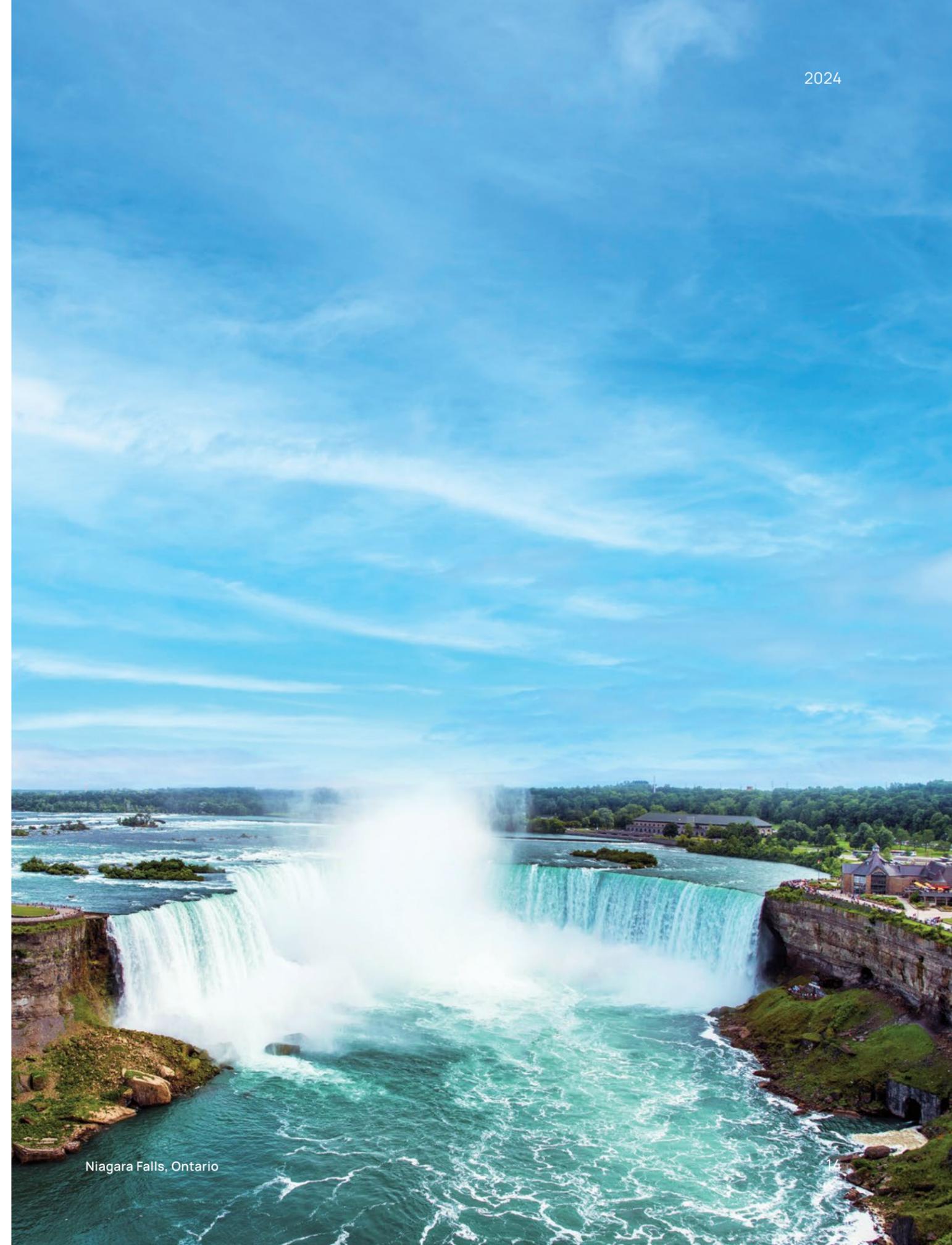
# The Future Of Tourism in the Niagara Region

Around the world, the tourism sector is undergoing transformation as consumer behaviours and values shift.

What visitors value and where they spend their time and money is changing. Destinations and businesses that explore and understand these shifts can act now to adapt operational models, improve product and service development, channel marketing budgets, and prepare for what's next. Based on Resonance's research and analysis of future trends that could influence the future of tourism and input from regional partners, the following trends are most likely to affect travel and tourism in the Niagara Region over the next 5-10 years.

## KEY MACRO TRENDS

Global forces are driving significant changes in the tourism industry, influencing how and where people travel and how businesses operate. As economic conditions, technological advancements, and environmental concerns continue to evolve, these macro trends create both challenges and opportunities for destinations worldwide. Understanding these broad trends allows Niagara's tourism sector to anticipate shifts in visitor expectations, adapt offerings, and remain competitive in a dynamic landscape.



Niagara Falls, Ontario

## KEY MACRO TRENDS

### Inflation

Inflation is on the rise globally due to several factors: increased labor costs, disrupted supply chains, and a rising demand for materials. For the tourism industry, this means that operational costs are rising, which will likely lead businesses to adjust pricing strategies. Additionally, as inflation reduces consumer spending power, tourism operators may need to focus on delivering cost-efficient, value-driven experiences to appeal to budget-conscious travellers.

### Reglobalization

A new era of “re-globalization” is shifting traditional supply chains and reshaping global travel dynamics. With increased onshoring and nearshoring, geopolitical tensions—such as the evolving U.S.-China relationship—could influence travel patterns, with travellers from both countries potentially exploring destinations closer to home. Although the U.S. remains a dominant economic force, and a growing share of global GDP resides there, Niagara may need to consider a more diversified visitor base, adjusting strategies to attract travellers less impacted by these shifts.

### Climate Reality

Climate change is increasingly affecting tourism, as many destinations experience the impacts of extreme weather events, wildfire smoke, and seasonal variability. This trend is likely to influence visitation in Niagara, where summer events might shift to earlier in the season. Additionally, the demand for sustainable travel options is growing, with travellers seeking eco-friendly destinations and practices. Adapting to this demand can give Niagara a competitive edge, offering responsible tourism practices that meet the expectations of environmentally-conscious visitors.

### Artificial Intelligence (AI)

AI technology is revolutionizing tourism by enhancing personalization and optimizing the visitor experience. With AI-powered tools, Niagara operators can offer tailored trip recommendations, assist travellers in real-time, and help manage disruptions during trips. However, as AI technology advances, trust in traditional user-generated content may decline, prompting a shift toward verified, curated content. Additionally, automation may alleviate some workforce challenges, as job losses in other sectors free up labor for tourism roles.

### Labour Shortage

Labour shortages remain a significant concern across the tourism industry. With challenges in attracting and retaining skilled workers, especially in service roles, businesses may face service quality issues, as reduced staff levels can lead to overworked employees and impact customer satisfaction. As a result, businesses are raising wages and improving benefits, which increases operational costs. To address these shortages, many are exploring automation and technology as solutions to maintain service standards while offsetting the need for manual labor in critical functions.



## KEY MARKET TRENDS

As the tourism industry adjusts to evolving traveller preferences and lifestyle changes, several market trends are reshaping how travellers choose their destinations, activities, and duration of stay. These trends represent significant opportunities for the Niagara Region, as it aligns offerings to meet the needs of domestic travellers, culinary enthusiasts, retirees, blended-trip seekers, and a shifting business travel landscape.



## KEY MARKET TRENDS

### Domestic Leisure Spending

Domestic travel is on the rise, with 74% of Canadians planning to vacation within the country. This shift presents an opportunity for destinations like Niagara to capture a larger share of local tourism spend by enhancing local and regional attractions. The demand for short, frequent trips, such as weekend getaways, encourages destinations to develop flexible, convenient packages that cater to the spontaneous, budget-conscious traveller.

### Culinary Tourism

Food-based travel is rapidly gaining popularity, with nearly half of travellers selecting destinations based on specific dining experiences. Culinary tourism represents a unique growth area for Niagara, where local dining, food tours, and cooking classes can be promoted. Emphasizing locally-sourced, sustainable ingredients and farm-to-table experiences appeals to conscious consumers, while also showcasing Niagara's rich culinary culture and regional produce.

### The Great Retirement

With an unprecedented number of older workers retiring, the tourism market is seeing an increased demand for senior-friendly experiences. This group, newly focused on life's unpredictability, is likely to embrace extended leisure travel, including longer stays and frequent vacations. Destinations that offer accessible accommodations, low-impact activities, and long-term stay options will attract retirees seeking comfortable, slower-paced travel, particularly in off-peak seasons.

### Blended Trips

Blended trips, where travellers combine business with leisure, are becoming mainstream, with 89% of corporate travellers looking to add leisure components to their business trips. These extended stays mean higher spending on dining, attractions, and local experiences, benefiting destinations prepared to cater to this audience. By providing amenities tailored to remote work—such as reliable Wi-Fi, comfortable workspaces, and co-working options—Niagara can attract this segment, extending stays and increasing local engagement.



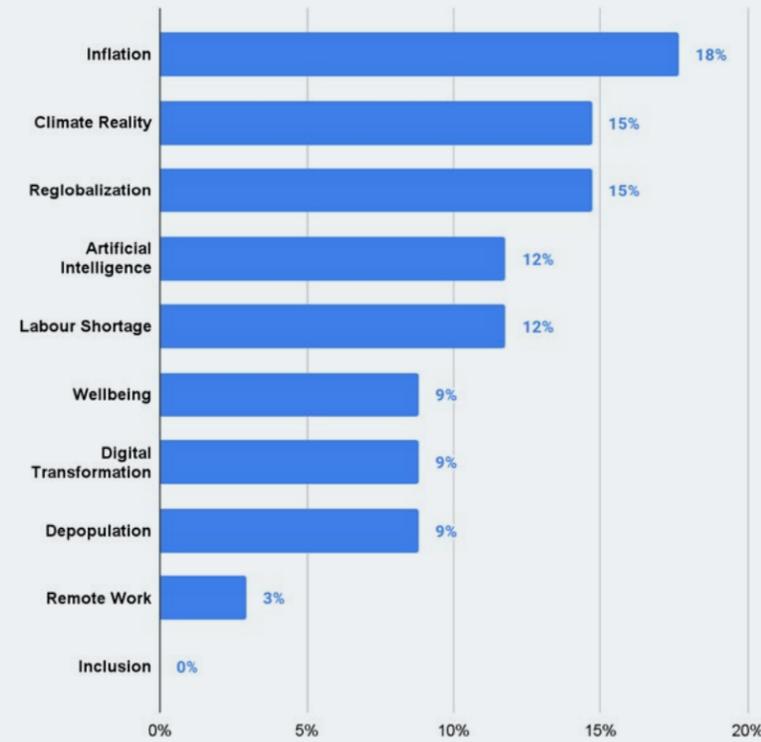
Henry of Pelham Family Estate Winery (Barrel Room), St. Catharines, Ontario

**KEY MARKET TRENDS**

**Reduced Business Travel**

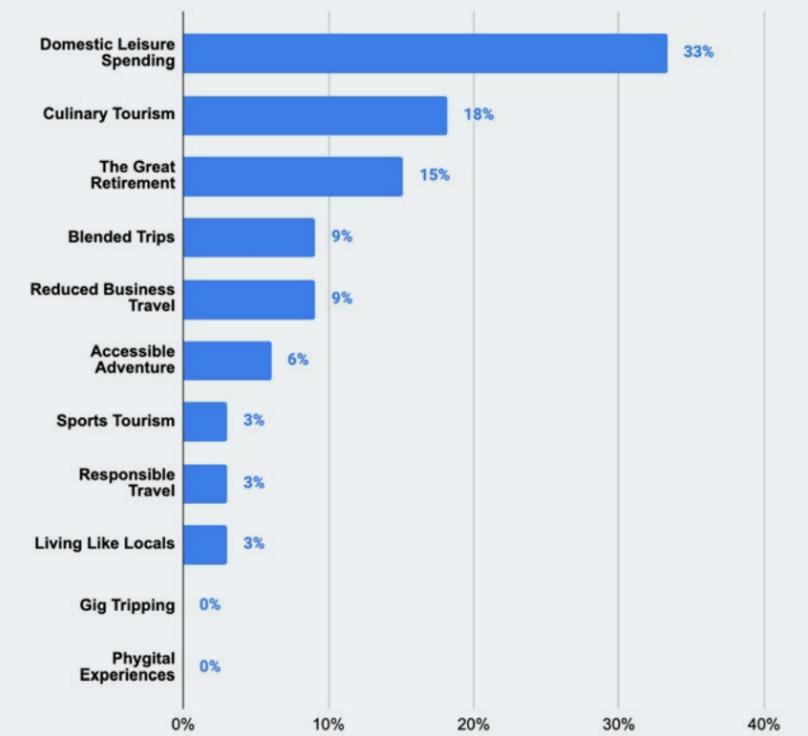
Corporate travel recovery remains sluggish, prompting destinations to diversify beyond traditional business travel revenue streams. The shift has led to a decline in MICE (Meetings, Incentives, Conferences, and Exhibitions) revenue, especially in urban centers, but it also creates opportunities to target “bleisure” travellers. By encouraging business travellers to extend their stay for leisure, Niagara can capture additional revenue and appeal to those combining essential business trips with local experiences.

**Key Macro Trends**



Source: TPN Visioning Workshop, Resonance

**Key Market Trends**



Source: TPN Visioning Workshop, Resonance

# 03 Vision





Niagara River, Niagara Falls, Ontario

# Vision

By 2030, Niagara will be a year-round destination known for its seamless integration of natural beauty, rich cultural heritage, and celebration of its terroir.

As a globally recognized destination, visitors will be drawn to Niagara for its iconic attractions, world-class wine and culinary experiences, and vibrant arts and entertainment scene. Offering something for every traveller—from families to adventure seekers—Niagara will provide diverse, immersive experiences that highlight the region's commitment to

sustainability and community. As a thriving, inclusive destination, Niagara will continue to evolve, setting a benchmark for tourism excellence in Canada while preserving its unique identity and warm hospitality. look most favorably on those partnerships focused on high-priority strategies and where TPN plays a lead role.

# Objectives

To position Niagara as a thriving, competitive destination, we have identified four key strategic objectives that will guide our efforts in growing tourism sustainably and effectively. These objectives align with our overarching mission to increase regional awareness, enhance visitor experiences, and support the long-term success of local stakeholders. Each objective is designed to address current challenges while capitalizing on new opportunities for growth.



Fort George National Historic Site, Niagara-on-the-Lake, Ontario

1	<b>Increase Awareness of the Region</b>	Elevate Niagara's profile as a premier destination, ensuring it stands out as a must-visit for both domestic and international travellers.
2	<b>Support Business Events and Group Travel</b>	Focus on attracting conferences, meetings, and events that drive year-round tourism and enhance economic impact through targeted outreach and tailored offerings.
3	<b>Drive Repeat Visits and Extend Length of Stay</b>	To maximize tourism's economic benefits, we will focus on attracting visitors who return frequently and extend their stays, deepening their engagement with the region.
4	<b>Encourage Year-Round Visitation and Regional Dispersion</b>	Promoting year-round tourism and encouraging visitors to discover the full breadth of Niagara's diverse experiences and attractions across all areas of the region.

# Target Audiences

TPN is committed to serving a diverse range of visitors, from leisure travellers drawn to the natural beauty and unique experiences of the region to business travellers attending events, conferences, and meetings.

TPN's approach is to understand and cater to both these groups by enhancing experiences that appeal to varied interests and needs.

To deepen our understanding of Niagara's diverse leisure visitor base, we developed a methodology in partnership with Environics Analytics to analyze visitation patterns across the region's primary attractions, capturing both single-site visits and cross-visitation trends. This approach segmented audiences by the locations they frequented, revealing unique visitor profiles aligned with specific interests. We analyzed key areas like Table Rock and the surrounding public plaza, which attracts the core "Falls" visitor; Clifton Hill, appealing to families by day and younger crowds in the evening; and Niagara-on-the-Lake's Queen Street, which draws in day-trippers and the theater-going audience. We also reviewed visitation to the Outlet Collection at Niagara for insights into the shopping crowd and we

looked at winery visitation—including the Beamsville Bench winery cluster—as a proxy for the wine-focused day-trip segment. Finally, Crystal Beach served as an indicator of Niagara's seasonal recreation audience, capturing the local appeal of Lake Erie shores and nearby options.

This initial and preliminary segmentation analysis was undertaken to provide insights into Niagara visitors. To identify why people visit, what they do and how often they participate in multiple activities. Seasonality was also considered by examining data at the summer peak travel periods and in the off season. More analysis needs to be done—consumer research underpins all marketing and related efforts—but these insights provide initial direction.

From these insights, we identified eight distinct target audiences that reflect Niagara's visitor diversity: First-Class Families, representing upscale family

groups; Multiculture-ish, an audience interested in multicultural experiences; Eat, Play, Love, food and leisure enthusiasts; South Asian Enterprise, a community with strong cultural and family connections; Multicultural Corners, a broad blend of culturally diverse visitors; Mid-City Mellow, relaxed urbanites; Metro Melting Pot, a variety-driven metropolitan crowd; and Came From Away, diverse families drawn to Niagara's iconic attractions. These segments provide a strategic foundation for focused engagement and marketing, offering a nuanced view of the motivations and behaviours that shape Niagara's tourism landscape.

TARGET AUDIENCES

# First-Class Families

Large, high-income suburban families

A comfortable suburban lifestyle, First-Class Families features sprawling families—nearly 40 percent of households contain four or more people—living in closed-in suburbs. In these established neighbourhoods, the parents are middle-aged, the children are between the ages of 10-24 and nearly 90 percent of

households live in pricey, single-detached houses. These active families enjoy many team sports as both participants and spectators. Many reserve weekends to shop, dine out, visit a theme park or relax in their hot tubs.

**Average Household Income:** \$184,211

**Urbanity:** Suburban

**Family:** Large Families (low diversity)





## TARGET AUDIENCES

# Multiculture-ish

High-income, multi-ethnic suburban families

One of the wealthier suburban lifestyles, Multiculture-ish is an ethnically-diverse segment with a high presence of middle-aged Asian and South Asian households. Located in and around major cities, more than 40 percent of residents are immigrants, and the rest are typically second-generation Canadians.

Multiculture-ish households tend to be large, and the significant presence of children influences their preference for family-friendly outings to theme parks, zoos and aquariums. Many like to jog, swim or play golf, while their kids participate in formal sports programs.

**Average Household Income:** \$179,023

**Urbanity:** Suburban

**Family:** Large Families (high diversity)

TARGET AUDIENCES

# Eat, Play, Love

Younger urban singles with high levels of university degrees

Eat, Play, Love earned its name for its younger, mobile singles who patronize ethnic restaurants, participate in numerous sports. Concentrated in urban cores, almost 90 percent of residents live in high-rise apartment and condo buildings. It also has the highest percent of members holding a university degree.

Many have upper-middle incomes for their age, typically from white-collar jobs in business, science, education and management. Young and unencumbered, they travel widely and enjoy urban nightlife, hitting concerts and attending food and wine shows.

**Average Household Income:** \$121,766

**Urbanity:** Urban

**Family:** Very Young Singles & Couples (high diversity)





## TARGET AUDIENCES

# South Asian Enterprise

Urban, upper-middle-income families, predominantly of South Asian descent

Reflecting Canada's increasing cultural diversity, South Asian Enterprise is an urban crossroads. 60 percent of the populace are immigrants and over 85 percent of members identify as visible minorities, predominately of South Asian descent. The segment contains high-income families living in a mix of new singles, semis and row houses in the

Greater Toronto and Calgary Areas. Few segments have larger households: over 50 percent contain four or more people. Over 60 percent of families are couples with kids, with a significant presence of adult children. These first- and second-generation Canadians have parlayed mixed educations into well-paying blue-collar and service sector jobs. They enjoy sports.

**Average Household Income:** \$151,602

**Urbanity:** Suburban

**Family:** Large Families (high diversity)

TARGET AUDIENCES

# Multicultural Corners

Culturally diverse, upper-middle-income city families

The middle-aged families of Multicultural Corners present an exceptionally culturally-diverse portrait. No one culture dominates with 40 percent of its residents being foreign born and more than 40 percent identify as visible minorities, including Black, Latin American, Arabic and South Asian. These first- and second-generation Canadians have moved beyond gateway

communities to the urban fringe of large cities. Now with middle to high incomes from grey- and white-collar jobs, they typically own single-detached and row houses suitable for their large families with older children. These active households engage in many sports. They're big purchasers of youth-oriented goods.

**Average Household Income:** \$146,651

**Urbanity:** Urban Fringe

**Family:** Large Families (high diversity)



TARGET AUDIENCES

## Mid-City Mellow

### Older city homeowners

The upper-middle income members of Mid-City Mellow lead a comfortable life. Over 85 percent of members own single-detached houses, typically in well-established city neighbourhoods with gardens. While most maintainers are over 55, these third-plus-generation Canadians include both older couples aging in place and middle-aged families raising older children.

They have the time and discretionary cash to attend theatre productions and play hockey, baseball, as well as play and watch football games. Media traditionalists, they like watching all manner of TV sports and receiving direct mail, particularly coupon booklets, catalogues and flyers inserted in the community paper.

**Average Household Income:** \$130,840

**Urbanity:** Urban

**Family:** Older Families & Empty Nests (low diversity)



TARGET AUDIENCES

# Metro Melting Pot

Culturally diverse, middle-income city dwellers

A segment encompassing long-established immigrant neighbourhoods, Metro Melting Pot has been a haven for upwardly-climbing newcomers for 25 years. Concentrated in Toronto and nearby Mississauga, more than half of the households contain immigrants; nearly a third speak a non-official language, such as Tagalog, Arabic and Spanish. Households include families and lone parents; maintainers range in age from

45 to over 75; and residents typically own an older single, semi or row house. Education range for this group is broad, and adults work at varied jobs in business, services and manufacturing. Eager to indulge their children, many go to theme parks, professional sports games and all-inclusive resorts. They also splurge on personal computers and small appliances.

**Average Household Income:** \$115,454

**Urbanity:** Urban Fringe

**Family:** Middle-Age Families (high diversity)





## TARGET AUDIENCES

# Came From Away

Multi-ethnic, middle-aged urban renters

Once home to young immigrants, Came From Away communities are showing their middle age. The highest concentration of residents are between 25 and 44 years old. Nearly 60 percent of the segment's residents are foreign born, and a third speak a non-official language at home. Members generally live in high-rise apartments in Toronto and a few other large cities; many households contain

singles or lone-parent families. While their educational achievement is wide-ranging, most residents hold grey-collar jobs earning below-average incomes. Even with tight budgets, many adults enjoy the varied entertainment options of cities—nightclubs, jazz concerts and billiards halls—while families head for theme parks, aquariums and zoos.

**Average Household Income:** \$83,755

**Urbanity:** Urban

**Family:** Middle-Age Families (high diversity)

# 04 Organizational Strategy

# Mission

To champion the breadth, growth, and sustainability of the Niagara region's tourism industry by fostering collaboration, leveraging data-driven insights, and providing visionary leadership. We are dedicated to promoting regional awareness, enhancing visitor experiences, and empowering local stakeholders to create a vibrant and inclusive tourism destination that benefits our communities and visitors alike.



VALUES

# Leadership

We are committed to being recognized as a leader amongst Ontario’s regional tourism organizations by focusing on those actions and initiatives where we can have the greatest impact. Leadership is not only about setting a direction but also inspiring others to join the journey. Our leadership value embodies:



Brock's Monument, Queenston, Ontario

## A SOLID PLATFORM

Niagara's tourism product is as diverse as its visitors, supported by skilled and well-resourced DMOs and private-sector operators. To maximize tourism's impact, we are committed to building a strong foundation of knowledge, tools, and expertise that empowers our partners and stakeholders to succeed.

## REGIONAL ADVOCACY

As the voice of tourism in Niagara, we advocate on behalf of the sector at the local, provincial, and national levels, ensuring that the industry's needs are addressed, barriers are removed, and opportunities are realized.

## DRIVING POSITIVE CHANGE

We take ownership of key issues such as workforce development, access, and business events, ensuring that the region is not just keeping pace with change but leading it.

VALUES

# Intelligence

Data-driven insights and informed decision-making are central to our approach. By embedding intelligence into every aspect of our operations, we ensure that our strategies are forward-looking and responsive to changes in the marketplace. This means:



## ACTIONABLE DATA FOR STAKEHOLDERS

We leverage real-time data collection and reporting to provide tourism partners with critical insights that enhance their operations, customer understanding, and long-term planning.

## INFORMED STRATEGIES

Our decisions are based on thoroughly understanding tourism demand, visitor behaviour, and market trends. Through comprehensive data analysis and forecasting, we can anticipate shifts and identify new opportunities.

## DEVELOPING REPEAT VISITOR PERSONAS

Through membership programs, several of Niagara's largest tourism operators (e.g., wineries, Shaw Festival, Niagara casinos) have detailed knowledge of repeat visitors. The use of anonymized membership data could provide rich targeting and marketing insights for a Niagara-wide benefit.

## INNOVATION AND CONTINUOUS IMPROVEMENT

We consistently analyze performance metrics, experiment with new approaches, and innovate based on data, ensuring we stay ahead of industry trends and continue to deliver value to our partners and visitors.

VALUES

# Collaboration

At the heart of our success is the value of collaboration. We believe that achieving tourism excellence, and driving repeat visitation throughout the year, requires a concerted effort across all sectors and stakeholders. Our commitment to collaboration fosters:



## PARTNERSHIPS THAT DRIVE RESULTS

We actively seek and nurture partnerships across the region and its destination management and economic development organizations, local businesses, event organizers, and support infrastructure (e.g., transportation), ensuring that all voices contribute to shaping the region's tourism strategy.

## SHARED VISION AND GOALS

By aligning with stakeholders, we develop and execute a shared vision for the Niagara region, bringing together resources and expertise to elevate our collective impact.

## INCLUSIVE DECISION-MAKING

We create open channels for dialogue and ensure that stakeholders—large and small—have a seat at the table, fostering an environment of trust and shared ownership.

## REGIONAL UNIT

Our work goes beyond individual destinations or attractions; we create a cohesive regional experience, ensuring all local assets contribute to the bigger narrative of Niagara as a premier travel destination.

# Strategic Drivers

## Marketing

We need a deep understanding of trip motivators, shared traits among visitor personas, and insights into emerging travel trends. Our approach focuses on supporting our DMOs and tourism operators by aligning their marketing activities with research-driven strategies that reduce overlap, optimize resources, and highlight the full spectrum of Niagara's offerings.

## Product Development

We facilitate the creation of innovative packages and enhance existing products and services. By fostering collaboration and creating synergies among partners, we aim to develop offerings that not only meet current demand but also anticipate future trends, ensuring that Niagara remains a dynamic and appealing destination for all visitors.

## Investment

We identify challenges that hinder tourism development at the municipal, regional, and provincial levels while actively seeking opportunities that can enhance the region's economic landscape. By collaborating with economic development partners and maintaining a comprehensive inventory of potential investments, we aim to create a supportive environment that attracts and facilitates tourism-related investments, driving long-term prosperity for the Niagara region.

## Workforce Support

We are committed to leveraging Niagara's resources to support workforce development, skills training, and job matching. By focusing on talent attraction, educational partnerships, and business support, we aim to strengthen the region's tourism workforce, ensuring that employers have access to well-trained professionals and that tourism is promoted as a dynamic career path.

## Industry Advancement

We focus on creating a unified voice for tourism in Niagara, promoting collaboration across stakeholders, and leveraging data-driven insights to guide strategic decisions. By building a robust regional network, supporting business development, and advocating for the industry's needs, we aim to elevate Niagara's position in the broader tourism landscape.

# Strategic Plan

## MARKETING

- Regional “Brand” Narrative
- Marketing Coordination
- Business Events Support
- Traveller Segmentation

## PRODUCT DEVELOPMENT

- Product Packaging
- Festivals & Events Support
- Amateur Sport & Special Event Tourism
- Support Qualified Start-Up Tourism Products/Services
- Indigenous Tourism

## INVESTMENT

- Tourism Investment Opportunities
- Tourism Investment Barriers

## WORKFORCE SUPPORT

- Tourism as a Career
- Business Support
- Workforce Development

## INDUSTRY ADVANCEMENT

- Unified Tourism Voice
- Regional Network
- Business Collaboration
- Actionable Insights
- Centralized Regional Data Dashboard
- Collective Intelligence
- Sustainable Tourism Practices

## PARTNERSHIP OPPORTUNITIES

# Partnerships

The Regional Tourism Organizations Guide notes that RTOs are eligible to receive a partnership allocation from the ministry based on their ability to leverage funding from regional members and stakeholders for joint projects that support the strategic drivers described above.

The intent of the partnership allocation is to encourage collaboration between the RTO and a variety of partners to leverage regional resources and to support new or incremental tourism activities that support the implementation of the RTO's business plan.

Historically, TPN has viewed partnerships as a means of leveraging funds, almost exclusively, for consumer marketing and/or marketing-related initiatives. These initiatives have generally been delivered through and/or in conjunction with the larger Niagara DMOs, and focused on promoting individual events, attractions or initiatives. Instead, going forward, TPN will rely on partnerships not only as a means of generating resources to address strategic drivers, and underlying action steps, but

also as a means of building a region-wide, team approach to tourism management for the benefit of the entire region.

In the following section, strategic drivers are set out with associated strategies. The role of TPN is defined for each strategy (essentially a “lead” or “support” role) together with a series of action steps. In the Roadmap section, the strategies are further detailed through identification of timing and level of effort throughout the three-year strategy. TPN will focus its partnership allocation dollars on programs, actions and activities that address high priority strategies. As a result, TPN will look most favorably on those partnerships focused on high-priority strategies and where TPN plays a lead role.



# Marketing

Niagara's visitor profile is diverse, ranging from one-time international travellers drawn by the iconic Niagara Falls to repeat visitors from nearby areas seeking a variety of attractions, arts, culture, recreation, and leisure experiences.

To effectively market to this wide audience, we need a deep understanding of trip motivators, shared traits among visitor personas, and insights into emerging travel trends. Our approach focuses on supporting our DMOs and tourism operators by aligning their marketing activities with research-driven strategies that reduce overlap, optimize resources, and highlight the full spectrum of Niagara's offerings.

## Marketing Strategies

- M.1 Regional Brand
- M.2 Marketing Coordination
- M.3 Business Events Support
- M.4 Traveller Segmentation

**M.1 REGIONAL “BRAND” NARRATIVE**

Develop and promote a narrative for the Niagara region

**ROLE:** LEAD

**ACTIONS**

- **Regional “Brand” Narratives:** Conduct positioning research to understand perceptions of the region and identify core strengths. Create a set of brand elements/descriptors that embody the unique aspects of Niagara (natural beauty, wine, history).
- **Content Platform:** Build a dynamic digital content hub that allows partners to access and contribute to the region’s storytelling. Include user-generated content, itineraries, and multimedia.
- **Key Messaging Strategy:** Develop clear, targeted messaging frameworks that outline how to effectively position the region to different visitor segments.

**M.2 MARKETING COORDINATION**

Drive awareness for the region by aligning marketing efforts with partners

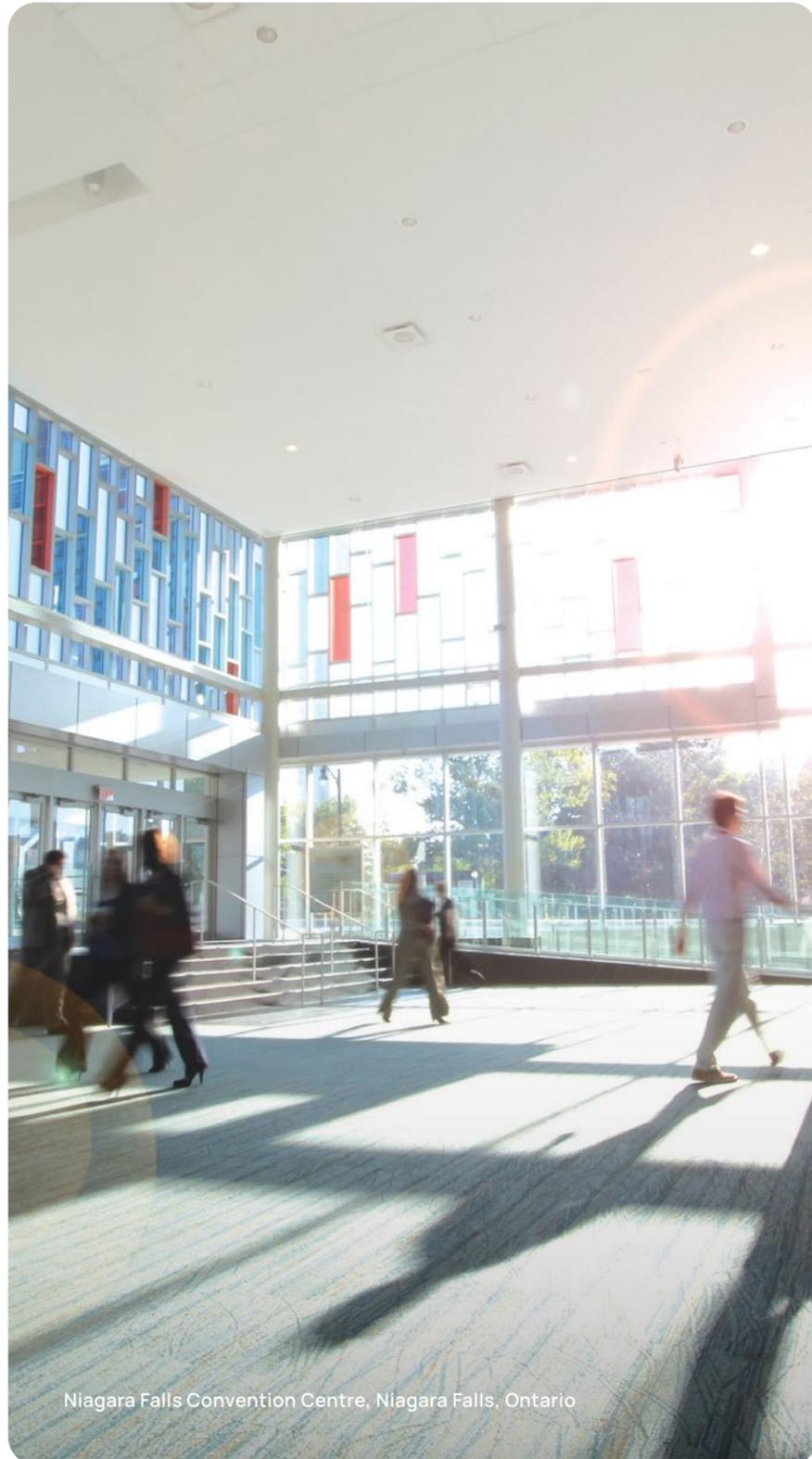
**ROLE:** LEAD

**ACTIONS**

- **Identify Market Opportunities:** Conduct market segmentation research to identify new geographic and demographic segments. Focus on potential high-value segments and repeat visitors (including business visitors).
- **Map Marketing Initiatives:** Create a comprehensive resource map that shows all marketing efforts in the region by market, season, and activity. Integrate with key stakeholders to ensure campaigns are synchronized across platforms and channels.
- **Align Marketing Efforts with Partners:** Establish a shared platform for regional tourism partners to share information on campaigns, target markets, and success metrics, ensuring unified messaging and avoiding duplication.



Niagara Whirlpool, Niagara Falls, Ontario



### M.3 BUSINESS EVENTS SUPPORT

Support the growth of business events in the region

**ROLE:** SUPPORT

#### ACTIONS

- **Help Build the Sales Funnel for Business Events:** Develop lead generation capability working with key destination marketing organizations and venues.
- **Coordinate region-wide Participation:** Ensure all Niagara attributes are marshalled in a compelling sales pitches for the overall destination.
- **Support Sales Missions:** Provide promotional materials and regional data to support participation in business event trade shows and sales missions.

### M.4 TRAVELLER SEGMENTATION

Understanding and targeting diverse visitor groups

**ROLE:** LEAD

#### ACTIONS

- **Understand Consumer Behaviour:** Conduct comprehensive research to gain deeper insights into traveller behaviours, preferences, and motivations. Use data-driven analysis to identify key visitor segments that are most likely to engage with the Niagara region's offerings.
- **Align Segmentation with Provincial & National Strategies:** Ensure that Niagara's segmentation approach is aligned with broader provincial and national tourism strategies. Collaborate with partners at these levels to harmonize efforts, enabling more targeted marketing initiatives that resonate with both domestic and international audiences (leisure and business).

# Product Development

Niagara boasts a diverse array of tourism products that attract visitors year-round, yet there are still gaps and opportunities for growth.

Our focus is on identifying areas of need, facilitating the creation of innovative packages, and enhancing existing products and services. By fostering collaboration and creating synergies among partners, we aim to develop offerings that not only meet current demand but also anticipate future trends, ensuring that Niagara remains a dynamic and appealing destination for all visitors.

## Product Development Strategies

**PD.1** Product Packaging

**PD.2** Festivals & Events Support

**PD.3** Amateur Sport & Special Event Tourism

**PD.4** Support Qualified Start-Up Tourism Products/Services

**PD.5** Indigenous Tourism

Jackson-Triggs Amphitheatre, Niagara-on-the-Lake, Ontario

**PD.1 PRODUCT PACKAGING**

Develop itineraries, for sale by others, to increase awareness of the region and local destinations

**ROLE:** LEAD

**ACTIONS**

- **Itinerary Development:** Collaborate with DMOs as well as local attractions and tour operators to identify opportunities for thematic, intra-regional, multi-day itineraries (e.g., linking a visit to Niagara Falls with a wine tour, outdoor adventure or cultural experience), for sale by others.
- **Product Inventory:** Maintain an updated list of tourism products, services, and experiences across the region to identify gaps and opportunities for new experiences.
- **Product Awareness:** Maintain inventory of venues/unique experiences to support convention/business event organizers and to incent intra-regional benefits from these events .

**PD.2 FESTIVALS & EVENTS SUPPORT**

Guide and support the development of new and existing events

**ROLE:** SUPPORT

**ACTIONS**

- **Regional Festivals & Events Strategy:** Develop a strategy to diversify and expand festivals. Ensure alignment with the regional brand and support off-peak season activities to increase visitor numbers throughout the year.
- **Event Planning:** Identify need periods where events could play a significant role in building off-season demand.

**PD.3 AMATEUR SPORT & SPECIAL EVENT TOURISM**

Position Niagara as a destination for intra-provincial and national competitions

**ROLE:** SUPPORT

**ACTIONS**

- **Event Hosting Opportunities:** Monitor opportunities to host tournaments, competitions, and related events requiring public assembly spaces and hotels.
- **Bid Support:** Support local hosts to compete for and organize bids.

**PD.4 SUPPORT QUALIFIED START-UP TOURISM PRODUCTS/SERVICES**

Provide management, marketing, and business support

**ROLE:** SUPPORT

**ACTIONS**

- **Business Growth Opportunities:** Identify start-up and niche tourism businesses with growth potential across the region.
- **Network Opportunities:** Facilitate networking among Niagara tourism businesses where packaging and partnering opportunities might be achieved.

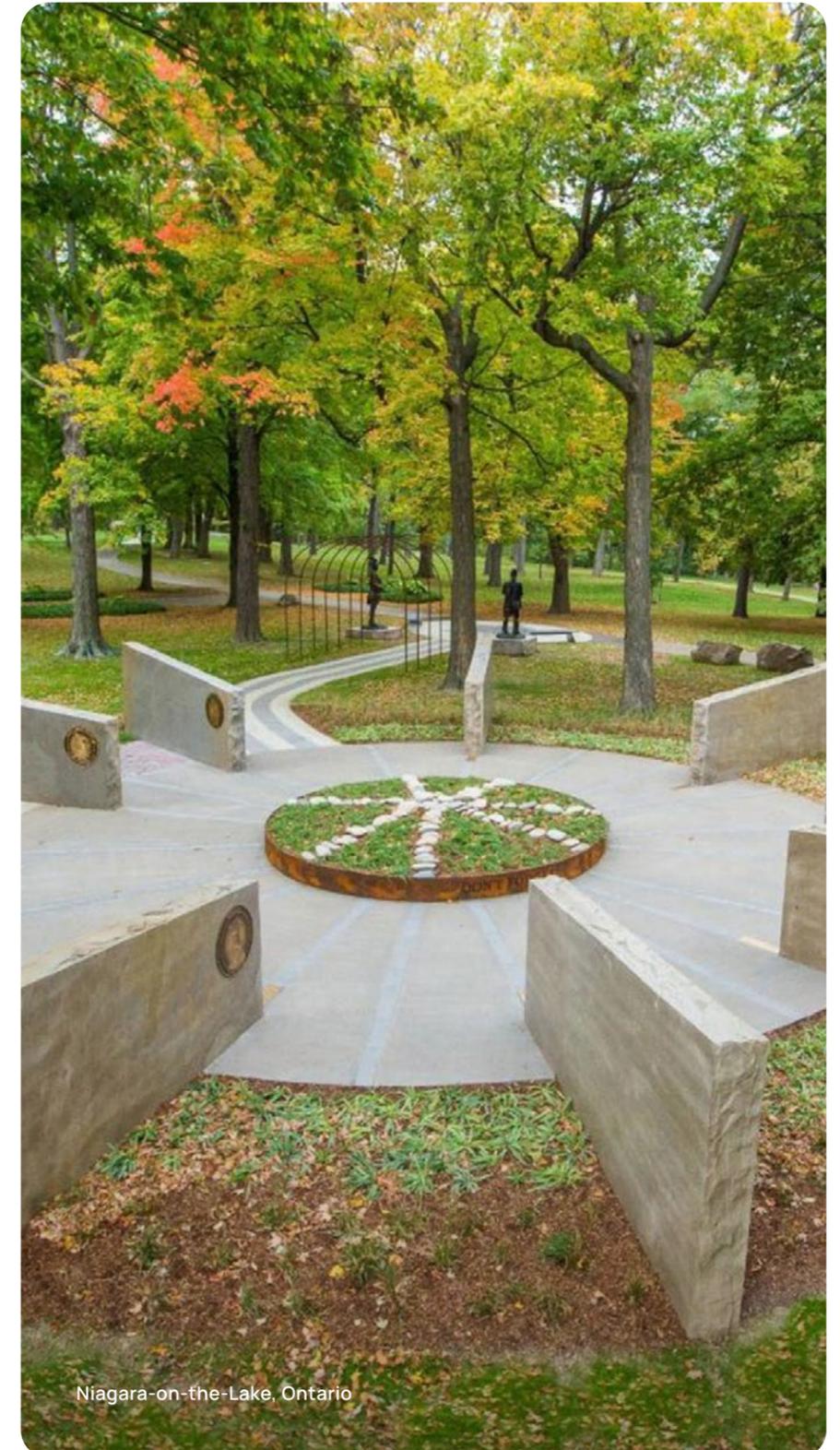
**PD.5 INDIGENOUS TOURISM**

Support the development of Indigenous tourism in the region

**ROLE:** SUPPORT

**ACTIONS**

- **Indigenous Tourism Development:** Partner with Indigenous communities to promote their culture and history. Provide training, funding, and marketing support to facilitate the growth of Indigenous-led tourism experiences.



Niagara-on-the-Lake, Ontario

# Investment

To drive sustainable growth in Niagara's tourism sector, addressing barriers and capitalizing on investment opportunities is crucial.

Our focus is on identifying challenges that hinder tourism development at the municipal, regional, and provincial levels while actively seeking opportunities that can enhance the region's economic landscape. By collaborating with economic development partners and maintaining a comprehensive inventory of potential investments, we aim to create a supportive environment that attracts and facilitates tourism-related investments, driving long-term prosperity for the Niagara region.

## Investment Strategies

I.1 Tourism Investment Barriers

I.2 Tourism Investment Opportunities



13th Street Winery, St. Catharines, Ontario

### I.1 TOURISM INVESTMENT BARRIERS

Identify barriers to investment at municipal and regional levels

**ROLE:** SUPPORT

#### ACTIONS

- **Industry Monitoring:** Monitor trade press and industry sector communications to identify principal inhibitors (e.g. red tape, development charges, policies)

### I.2 TOURISM INVESTMENT OPPORTUNITIES

Identify and share investment opportunities in the region

**ROLE:** SUPPORT

#### ACTIONS

- **Economic Development Collaboration:** Liaise with Niagara Economic Development and municipal economic development offices to undertake local research, and related activities, designed to identify, understand and support investment opportunities.
- **Investment Opportunity Inventory:** Develop an inventory of tourism investment opportunities and promote these with partners.

# Workforce Support

While tourism is a major economic driver in Niagara, barriers sometimes prevent the seamless connection between job opportunities and skilled individuals.

To address these challenges, we are committed to leveraging Niagara's resources to support workforce development, skills training, and job matching. By focusing on talent attraction, educational partnerships, and business support, we aim to strengthen the region's tourism workforce, ensuring that employers have access to well-trained professionals and that tourism is promoted as a dynamic career path.

## Workforce Support Strategies

**WS.1** Tourism as a Career

**WS.2** Business Support

**WS.3** Workforce Development

Port Dalhousie Pier, St. Catharines, Ontario

**WS.1 TOURISM AS A CAREER**

Support the promotion of tourism as a career

**ROLE:** SUPPORT

**ACTIONS**

- **Talent Attraction Campaign:** Partner with schools and universities to promote tourism as a viable and exciting career. Highlight stories of successful careers in the sector through media campaigns.
- **Partnerships with Educational Institutions:** Foster partnerships with colleges and universities to create tourism-related programs and internships.

**WS.2 BUSINESS SUPPORT**

Provide access to business training

**ROLE:** SUPPORT

**ACTIONS**

- **Business Development Resources:** Offer a central resource hub where businesses can access tools, training, and best practices to grow and scale their operations.

**WS.3 WORKFORCE DEVELOPMENT**

Provide access to workforce programs and opportunities

**ROLE:** SUPPORT

**ACTIONS**

- **Workforce Training Resources:** Provide online and in-person training programs tailored to hospitality, customer service, and digital skills development.
- **Centralized Job Platform:** Develop an industry-specific job portal that connects local businesses with skilled workers looking for opportunities in tourism.



Inn on the Twenty - Niagara-on-the-Lake Ontario

# Industry Advancement

To foster a thriving and resilient tourism sector, the advancement of industry practices is essential.

Our focus is on creating a unified voice for tourism in Niagara, promoting collaboration across stakeholders, and leveraging data-driven insights to guide strategic decisions. By building a robust regional network, supporting business development, and advocating for the industry's needs, we aim to elevate Niagara's position in the broader tourism landscape. Additionally, our commitment to sustainability ensures that growth aligns with environmental stewardship, supporting long-term success for the region's communities and natural assets.

## Industry Advancement Strategies

IA.1 Unified Tourism Voice

IA.2 Regional Network

IA.3 Business Collaboration

IA.4 Actionable Insights

IA.5 Centralized Data Dashboard

IA.6 Collective Intelligence

IA.7 Sustainable Tourism Practices

**IA.1 UNIFIED TOURISM VOICE**

Speak for for the travel and tourism sector in the region to address barriers

**ROLE:** LEAD

**ACTIONS**

- **Industry Representation:** Establish a formal group representing tourism stakeholders to speak for the industry’s needs, working with local and provincial government bodies.
- **Tourism Forum & Regional Councils:** Organize regular forums and meetings with regional councils to discuss common challenges, share updates, and align objectives.
- **Provincial & National Collaboration:** Strengthen collaboration with Ontario and national tourism bodies to ensure Niagara is positioned in larger-scale campaigns and programs.

**IA.2 REGIONAL NETWORK**

Share industry news and achievements, and coordinate stakeholder engagement

**ROLE:** LEAD

**ACTIONS**

- **Information Sharing:** Build a shared digital space for stakeholders to share news, research, and best practices. Regularly updated with industry insights and data.
- **Local Stakeholder Engagement:** Host regular meetings and workshops with local tourism businesses and stakeholders to foster collaboration and discuss region-specific challenges and opportunities.

**IA.3 BUSINESS COLLABORATION**

Encourage regional collaboration between stakeholders

**ROLE:** LEAD

**ACTIONS**

- **Business Inventory:** Maintain a detailed database of tourism-related businesses and services in the region to support networking and collaboration.
- **Destination Working Groups:** Form specialized working groups focused on different themes (e.g., culinary, nature, family) to bring stakeholders together for collaborative product development and marketing initiatives.



Niagara Benchlands, Ontario

#### IA.4 ACTIONABLE INSIGHTS

Collect and compile tourism supply and demand data to support regional and local decision-making

**ROLE:** LEAD

##### ACTIONS

- **Data Collection:** Implement a structured system to regularly collect tourism performance data, visitor demographics, and trends.
- **Data Reporting:** Develop monthly or quarterly reports that distill key insights and share them with stakeholders to inform decisions.

#### IA.5 CENTRALIZED DATA DASHBOARD

Develop and maintain a data dashboard to track the state of tourism in the region

**ROLE:** LEAD

##### ACTIONS

- **Data Dashboard:** Create an interactive, real-time dashboard that tracks visitor metrics, economic impact, and key performance indicators across the region.
- **Regional Measurement Framework:** Develop standardized metrics and KPIs to evaluate the impact of tourism initiatives and compare performance across Niagara's sub-regions.

### IA.6 COLLECTIVE INTELLIGENCE

Manage data partnerships and licensing to centralize information and reduce duplication

**ROLE:** LEAD

#### ACTIONS

- **Data Licensing:** Work with third-party data providers to obtain detailed visitor profiles and trends. Negotiate licenses to share this data across partners.
- **Data Commercialization:** Explore opportunities to monetize data insights by offering subscriptions or reports to tourism businesses.

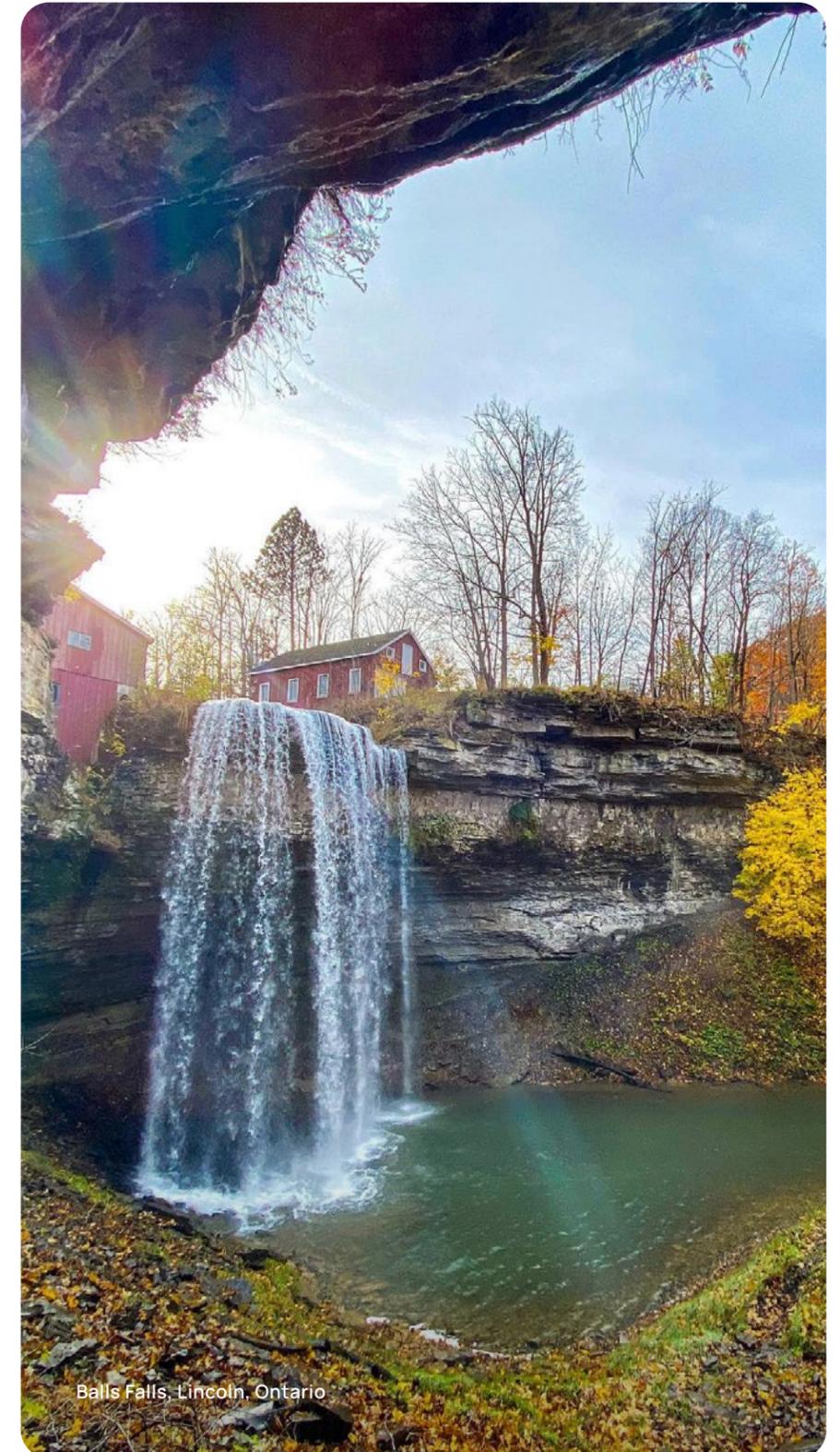
### IA.7 SUSTAINABLE TOURISM PRACTICES

Advance the sustainability of the tourism sector in the region

**ROLE:** SUPPORT

#### ACTIONS

- **Sustainable Tourism Practices:** Collaborate with industry stakeholders to promote and implement sustainable tourism practices, ensuring that growth in tourism does not come at the expense of the environment or community wellbeing.
- **Sustainability metrics:** Establish benchmarks and track the region's sustainability performance, including environmental impact.
- **Sustainable Product Development:** Encourage the development of tourism products that prioritize environmental stewardship, support local economies, and promote cultural preservation.



# 05 Roadmap

# Roles & Priorities

The Strategic Plan contains 21 strategies and 44 underlying action items.

All are important for the successful transformation of TPN, from a pure consumer marketing organization to an entity responsible for region-wide destination management. But not everything can be done at once.

This strategic plan covers the first three years of the transformation, recognizing TPN's limits and setting out a framework to deploy our resources in a meaningful way. The plan also identifies those strategies that carry on into year four and beyond. This roadmap addresses two elements: the role of TPN and the priority of the strategy, specifically:

## TPN ROLE

Throughout the Organization Strategy section above, TPN's role has been identified as:

- **Lead:** The primary party responsible for the strategy, setting and monitoring outcomes and communicating progress
- **Support:** A secondary role with specific responsibilities tied to an agreed outcome, but led by someone else (e.g., a DMO, educational institution, private tourism operator).

## PRIORITY

Although each strategy is important, as are the underlying action items, not everything can or should be undertaken at once, or with similar intensity. As a result, the plan sets out three stages, or phases, of action:

- **Set up/Planning:** Preparatory work needed prior to fully implementing the strategy.
- **Implementation:** Immediate priority where the necessary groundwork has been completed, the need is immediate and/or where TPN has the tools necessary to commence.
- **Continuous:** Ongoing effort to continue, monitor or otherwise support the strategy following implementation.

Ongoing monitoring of the roadmap will enable TPN to adjust the priority "setting" for each strategy. The strategic plan will be used to develop TPN's ongoing business plan as well as consideration of partnership opportunities.

# 3-Year Strategic Roadmap



# Strategies Lead by TPN



# Strategies Support by TPN

#	STRATEGY	YEAR 1	YEAR 2	YEAR 3	YEAR 4+
IA.7	Sustainable Tourism Practices	→			
M.3	Business Events Support		→		
PD.3	Amateur Sport & Special Event Tourism		→		
PD.4	Support Qualified Start-Up Tourism Products/Services	→			
PD.5	Indigenous Tourism	→			
WS.1	Tourism as a Career	→			
WS.3	Business Support	→			
WS.4	Workforce Development	→			
I.1	Tourism Investment Barriers	→			
I.2	Tourism Investment Opportunities	→			



# Summary of Strategies

[L] Lead [S] Support

M. MARKETING	
<b>M.1 Regional “Brand” Narrative [L]</b>	
Regional “Brand” Narratives [L]	Conduct positioning research to understand perceptions of the region and identify core strengths. Create a set of brand elements/descriptors that embody the unique aspects of Niagara (natural beauty, wine, history).
Content Platform [L]	Build a dynamic digital content hub that allows partners to access and contribute to the region's storytelling. Include user-generated content, itineraries, and multimedia.
Key Messaging Strategy [L]	Develop clear, targeted messaging frameworks that outline how to effectively position the region to different visitor segments.
<b>M.2 Marketing Coordination [L]</b>	
Identify Market Opportunities [L]	Conduct market segmentation research to identify new geographic and demographic segments. Focus on potential high-value segments and repeat visitors (including business visitors).
Map Marketing Initiatives [L]	Create a comprehensive resource map that shows all marketing efforts in the region by market, season, and activity. Integrate with key stakeholders to ensure campaigns are synchronized across platforms and channels.
Align Marketing Efforts with Partners [L]	Establish a shared platform for regional tourism partners to share information on campaigns, target markets, and success metrics, ensuring unified messaging and avoiding duplication.
<b>M.3 Business Events Support [S]</b>	
Help Build the Sales Funnel for Business Events [S]	Develop lead generation capability working with key destination marketing organizations and venues.
Coordinate region-wide participation [L]	Ensure all Niagara attributes are marshalled in a compelling sales pitches for the overall destination.
Support Sales Missions [S]	Provide promotional materials and regional data to support participation in business event trade shows and sales missions.

# Summary of Strategies

[L] Lead [S] Support

## M.4 Traveller Segmentation [L]

### Understand Consumer Behaviour [L]

Conduct comprehensive research to gain deeper insights into traveller behaviours, preferences, and motivations. Use data-driven analysis to identify key visitor segments that are most likely to engage with the Niagara region's offerings.

### Align Segmentation with Provincial & National Strategies [L]

Ensure that Niagara's segmentation approach is aligned with broader provincial and national tourism strategies. Collaborate with partners at these levels to harmonize efforts, enabling more targeted marketing initiatives that resonate with both domestic and international audiences (leisure and business).

## PD. PRODUCT DEVELOPMENT

### PD.1 Product Packaging [L]

#### Itinerary Development [L]

Itinerary Development: Collaborate with DMOs as well as local attractions and tour operators to identify opportunities for thematic, intra-regional, multi-day itineraries (e.g., linking a visit to Niagara Falls with a wine tour, outdoor adventure or cultural experience), for sale by others.

#### Product Inventory [L]

Maintain an updated list of tourism products, services, and experiences across the region to identify gaps and opportunities for new experiences.

#### Product Awareness [L]

Maintain inventory of venues/unique experiences to support convention/business event organizers and to incent intra-regional benefits from these events.

### PD.2 Festivals & Events Support [L]

#### Regional Festivals & Events Strategy [L]

Develop a strategy to diversify and expand festivals. Ensure alignment with the regional brand and support off-peak season activities to increase visitor numbers throughout the year.

#### Event Planning [S]

Identify need periods where events could play a significant role in building off-season demand.

# Summary of Strategies

[L] Lead [S] Support

## PD.3 Amateur Sport & Special Event Tourism [S]

Event Hosting Opportunities [S]

Monitor opportunities to host tournaments, competitions, and related events requiring public assembly spaces and hotels.

Bid Support [S]

Support local hosts to compete for and organize bids.

## PD.4 Support Qualified Start-Up Tourism Products/Services [S]

Business Growth Opportunities [S]

Identify start-up and niche tourism businesses with growth potential across the region.

Networking Opportunities [S]

Facilitate networking among Niagara tourism businesses where packaging and partnering opportunities might be achieved.

## PD.5 Indigenous Tourism [S]

Indigenous Tourism Development [S]

Partner with Indigenous communities to promote their culture and history. Provide training, funding, and marketing support to facilitate the growth of Indigenous-led tourism experiences.

## I. INVESTMENT

### I.1 Tourism Investment Barriers [S]

Industry Monitoring [S]

Monitor trade press and industry sector communications to identify principal inhibitors (e.g. red tape, development charges, policies)

### I.2 Tourism Investment Opportunities [S]

Economic Development Collaboration [S]

Liaise with Niagara Economic Development and municipal economic development offices to undertake local research, and related activities, designed to identify, understand and support investment opportunities.

Investment Opportunity Inventory [S]

Develop an inventory of tourism investment opportunities and promote these with partners.

# Summary of Strategies

[L] Lead [S] Support

## WS. WORKFORCE SUPPORT

### WS.1 Tourism as a Career [S]

#### Talent Attraction Campaign [S]

Partner with schools and universities to promote tourism as a viable and exciting career. Highlight stories of successful careers in the sector through media campaigns.

#### Partnerships with Educational Institutions [S]

Foster partnerships with colleges and universities to create tourism-related programs and internships.

### WS.2 Business Support [S]

#### Business Development Resources [S]

Offer a central resource hub where businesses can access tools, training, and best practices to grow and scale their operations.

### WS.3 Workforce Development [S]

#### Workforce Training Resources [S]

Provide online and in-person training programs tailored to hospitality, customer service, and digital skills development.

#### Centralized Job Platform [S]

Develop an industry-specific job portal that connects local businesses with skilled workers looking for opportunities in tourism.

## IA. INDUSTRY ADVANCEMENT

### IA.1 Unified Tourism Voice [L]

#### Industry Representation [L]

Establish a formal group representing tourism stakeholders to speak for the industry's needs, working with local and provincial government bodies.

#### Tourism Forum & Regional Councils [L]

Organize regular forums and meetings with regional councils to discuss common challenges, share updates, and align objectives.

#### Provincial & National Collaboration [L]

Strengthen collaboration with Ontario and national tourism bodies to ensure Niagara is positioned in larger-scale campaigns and programs.

# Summary of Strategies

[L] Lead [S] Support

<p>IA.2 Regional Network [L]</p>	<p>Information Sharing [L]</p> <p>Local Stakeholder Engagement [L]</p>	<p>Build a shared digital space for stakeholders to share news, research, and best practices. Regularly updated with industry insights and data.</p> <p>Host regular meetings and workshops with local tourism businesses and stakeholders to foster collaboration and discuss region-specific challenges and opportunities.</p>
<p>IA.3 Business Collaboration [L]</p>	<p>Business Inventory [L]</p> <p>Destination Working Groups [L]</p>	<p>Maintain a detailed database of tourism-related businesses and services in the region to support networking and collaboration.</p> <p>Form specialized working groups focused on different themes (e.g., culinary, nature, family) to bring stakeholders together for collaborative product development and marketing initiatives.</p>
<p>IA.4 Actionable Insights [L]</p>	<p>Data Collection [L]</p> <p>Data Reporting [L]</p>	<p>Implement a structured system to regularly collect tourism performance data, visitor demographics, and trends.</p> <p>Develop monthly or quarterly reports that distill key insights and share them with stakeholders to inform decisions.</p>
<p>IA.5 Centralized Regional Data Dashboard [L]</p>	<p>Data Dashboard [L]</p> <p>Regional Measurement Framework [L]</p>	<p>Create an interactive, real-time dashboard that tracks visitor metrics, economic impact, and key performance indicators across the region.</p> <p>Develop standardized metrics and KPIs to evaluate the impact of tourism initiatives and compare performance across Niagara’s sub-regions.</p>
<p>IA.6 Collective Intelligence [L]</p>	<p>Data Licensing [L]</p> <p>Data Commercialization [L]</p>	<p>Work with third-party data providers to obtain detailed visitor profiles and trends. Negotiate licenses to share this data across partners.</p> <p>Explore opportunities to monetize data insights by offering subscriptions or reports to tourism businesses.</p>

# Summary of Strategies

[L] Lead [S] Support

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IA.7 Sustainable Tourism Practices [S]

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Sustainable Tourism Practices [S]

Collaborate with industry stakeholders to promote and implement sustainable tourism practices, ensuring that growth in tourism does not come at the expense of the environment or community wellbeing.

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Sustainability Metrics [L]

Establish benchmarks and track the region's sustainability performance, including environmental impact.

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Sustainable Product Development [S]

Encourage the development of tourism products that prioritize environmental stewardship, support local economies, and promote cultural preservation.

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# Contact

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—  
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resonance

TOURISM  
NIAGARA  
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