REDISCOVERING NORTHERN ONTARIO:

Partnerships for a Strong Tourism Industry

Northern OntarioTourism Marketing Strategy
2012-2017

Content

EXECUTIVE SUMMARY

Executive Summary

Project Overview

In In the spring of 2007, a new tourism strategy for Northern Ontario for 2008-2012 was developed, led by the Strategic Development and Marketing Partnership for Northern Ontario. At the beginning of 2011, RTO 13, in partnership with the Northern Office of OTMPC, and on behalf of the Northern Ontario tourism industry, looked to develop a "second generation" marketing strategy for 2012-2017 to grow and develop tourism in the region.

This strategy will form the basis for successful working relationships among its three sub-regions and industry stakeholders, and forms only one part of a future destination development plan. It looks to build on the success of the existing strategy in order to "retool, refresh and reposition" the marketing strategy for the next five years – bringing to it the context of current and foreseeable tourism needs.

This includes defining a roles and responsibilities framework for tourism marketing by industry stakeholders, specifically articulating the role of RTO13 in the marketing hierarchy; identifying, evaluating and prioritizing marketing opportunities; and developing an implementation approach that allows various marketing activities to align and cascade without duplication for the best use of marketing dollars. It is expected that stakeholders will use the strategy as a framework when planning and funding marketing strategies/efforts.

Where have we come from?

The 2008-12 strategy made important recommendations as to industry structure/roles, target markets, products, branding and marketing tactics that produced significant outcomes. The plan emphasized the objective of coordination and alignment in tactics and markets. It developed a brand personality for Northern Ontario, establishing the great outdoors as the unique selling proposition (USP) and emphasized the importance of best bets – leading with the best in terms of products and focusing in on market opportunities. The plan also identified two major issues – the importance of product development to the success of the industry, and the need for additional resources to market Northern Ontario.

The implementation of the strategy created an environment of groups working together as part of a coordinated process. A cascading approach to marketing was undertaken, and the OTMPC Northern Office effectively led with "Ontario, Canada's Great Outdoors" while focusing on four core experiences (angling, hunting, nature/adventure, and recreational motorsports). Its partners, expected to position their destination, region or city and its product offering within the brand of the next higher tier, executed this with differing levels of effort and success. A single Internet window, the Northern Ontario web portal, was built to generate interest and buzz on the web, and a number of tourism organizations contributed content to the site on an ongoing basis. There were some fulfillment challenges due to the sustainability and capacity issues of some of the partner organizations; and because of available resources, not all recommended new markets could be pursued. Separating Northern Ontario into two rather than three regions also presented a challenge for marketing the north central region.

What has changed?

The most far-reaching changes to the tourism landscape in Northern Ontario since the previous strategy are shifts in industry structure and in available financial resources for tourism marketing. As a direct result of the Sorbara report, the Regional Tourism Organization, RTO 13, was created -- the only region divided into sub-regions (13A, 13B, 13C) due to geographic size and the North's unique marketing and travel corridors. Its role is to coordinate and support tourism marketing efforts within the sub-regions, and align those marketing efforts with activities and initiatives of other stakeholders. Funding is provided to RTO 13 on an annual basis via transfer payment agreements with the Ministry of Tourism and Culture, significantly increasing the overall budget for marketing tourism in Northern Ontario. Meanwhile, the core budget allocated to the Northern program (or OTMPC Northern Office) by OTMPC will also continue. At the same time, it is likely that the Northern Office will phase out its existing Northern partnership agreements (MOU's or fee for service agreements) with the cities and regional tourism organizations by the time the plan is in effect.

Changes are also apparent when reviewing the most current market research available on visitation and travel intentions for Northern Ontario. There has been an overall drop in tourism activity in the region, likely due to poor economic conditions. The Canadian economy continues to recover slowly but recovery is much slower in the U.S., and there are generally fewer American travelers compared to previous years. There is relatively low interest in visiting Northern Ontario amongst those who have visited Ontario, and the region's rating for pleasure travel has remained relatively static over the last three years. Amongst those who are aware of Ontario, unprompted awareness of things to see and do in Northern Ontario is very low. There are also changes in the area of marketing tactics – the trends in terms of how consumers access tourism information and make their travel decision. The Internet is now unequivocally the number one travel planning tool; and making it easy for consumers to access information and plan their trip online is imperative.

There is an increased usage of social media that would have been impossible to foresee five years ago, that points to the growing importance of travel influencers (travel advice, reviews, blogs), and a shift in the use of the Internet towards connecting with other people, versus looking for things. In the same vein, it would have been difficult to predict the growing importance of mobile devices in travel planning.

One thing that has not changed considerably since the previous strategy is the tourism product landscape. There have been positive developments with new air carriers increasing access and driving down travel costs to some areas, and some limited product development (touring, Great Lakes cruising, investment into attractions, more product packaging). However, the struggle of some notable attractions has moved them away from a tourism model (Shania Twain Centre, Polar Bear Habitat); many avid angling and hunting operators are struggling or face ageing infrastructure; and there is a continued lack of accommodation/facility infrastructure in some primary and secondary cities.

What key issues are considered in the new strategy?

The changes to industry structure require clarification of the various roles of organizations (RTO, OTMPC, NORTAs and cities) in marketing Northern Ontario. At the same time, it is acknowledged that in some cases partners do not work well together, a number of organizations have sustainability and capacity issues, and that there is a variety of often competing tourism interests to satisfy.

Another key issue is the limit to which the industry can impact visitor numbers because many visitors are not on pleasure trips, stay in private accommodation and/or reside within Northern Ontario. Statistics reveal that less than one third of all tourist visits to Northern Ontario fall into the category of those that can likely be impacted by tourism marketing activities undertaken to promote visitation.

Despite this, it is important to address the image of Northern Ontario, the lack of familiarity and interest in the region, and the lack of awareness of things to see and do. There has been no increase in interest or intention to travel amongst Americans or Canadians in the past year, and no evidence of image improvement. Northern Ontario is viewed primarily as a remote location and there is a lack of familiarity and poor appreciation of its differentiating features. Unprompted awareness of tourism products is low, and core products like angling, hunting, and motorsports rank low amongst consumers when defining unique experiences in the region.

Northern Ontario must also address gaps between current marketing efforts and the origin or purpose of tourist visits and the activities consumers are interested in when considering it as a travel destination. Although U.S. visitation has been declining since 2002, many of the previous strategy's "best bet" markets were U.S. markets; and the U.S. is a primary target market for most cities and regional tourism organizations, with significant resources expended. The ability of the U.S. to recover to previous levels is unknown, necessitating a consideration of the traditional reliance on this. Resources allocated to the Quebec, Chicago and family markets, and to consumer shows and publications should also be reconsidered. At the same time, many regional and city priorities and sub-regional trip motivators are not part of OTMPC's product programs, and therefore not marketed at a pan-Northern level (e.g. touring, recreational outdoor pursuits, attractions, natural wonders/lakes/rivers as distinctive destinations). Other marketing gaps include: private cottage accommodation, trip motivator attractions, inter/intra regional travel, VFR, the domestic market, business travel, camping, and new/emerging products.

Online tactics are at the core of the current marketing strategy and some gaps in the pan-Northern online presence are identified. The Northern Ontario website portal refers users to other sites for basic tourism information; but these sites vary in quality and content. Closing the sale in the online context can be improved, as there are few online booking capabilities, too many clicks to a call to action or fulfillment from Northern portal, and operators say they receive few leads from other websites. Pan-Northern destination-focused tourism information (geographic orientation, general overview, ability for consumer to "window shop") is lacking; and online tourism information primarily reflects tourism product as defined by the operators who are members of tourism organizations.

Where are we going?

Moving forward, the tourism industry will adjust its goals and objectives to maximize the potential to successfully attract visitors and grow spending, meet the need to achieve a long-term competitive and sustainable tourism industry in the region, and achieve the goals and objectives of *Discovering Ontario, a report on the future of tourism*. Referencing this report, Northern Ontario's overarching marketing goal would be to double tourism receipts by 2020.

This is a lofty target in a changing, challenging marketplace and in a time of significant transition in the structure of the tourism industry. By breaking it down further, the industry can focus on the areas of visitation that Northern Ontario tourism marketing can realistically impact – not increasing "overnight stays" or "visitor spending", but visitation specifically in non-private roofed accommodation ("heads in beds"); from outside of the region; and for pleasure trips.

This requires managing and directing the efforts of all stakeholders towards driving more business from key markets and 'best bet' areas of opportunity; designing and delivering marketing programs that not only align, coordinate, and cascade without duplication, but also enhance and augment each other; and developing tactics and messaging for all marketing programs based on target markets and visitor demographics.

Marketing strategy

The recommended best bet market opportunities were developed with less emphasis on consumer segmentation, and a focus on better penetration of existing markets while pursuing new opportunities and emerging markets. Overall, recommendations represent a balance between U.S. and non-American markets, move away from previously defined "best bet" markets that do not appear to be working, and consider markets that are "closer to home". For OTMPC's Northern Office, recommendations incorporate activity-based markets using Northern Ontario product as the trip motivator (the current avid product groups); new markets (defined as any market that was not prioritized or actively targeted in the past, including domestic, New Canadians, and Europe); and existing U.S. markets. For the RTO sub-regions, recommendations incorporate activity-based markets using Northern Ontario product as the trip motivator (including recreational outdoor, touring, sport tourism and meeting and corporate); a manageable number of existing Northern Ontario geographic markets with opportunity for further market penetration (Manitoba, Southern Ontario and the border states of Michigan, Ohio, Minnesota and Wisconsin); inter-regional markets; and OTMPC's "new" geographic markets (once inroads have been made, though quick entry into the GTA in partnership with OTMPC is encouraged).

In terms of branding, it is recommended that OTMPC continue the following: branding activities related to pan-Ontario product experiences with a Northern Ontario emphasis (e.g. Go Fish, Go Ride, etc.); using Northern Ontario as the "lead" for pan-Ontario outdoor product; working with OTMPC to ensure Northern Ontario is featured in provincial branding activities; and use of "Canada's Great Outdoors" in U.S. markets. Given OTMPC's focus, there is no pan-Northern brand that resonates with all geographic markets and encompasses both Northern Ontario's destinations and experiences. A pan-Northern branding approach is therefore recommended, but solely as a necessity in limited contexts. "Ontario's True North" could be adopted for this purpose, and used in the context of pan-Northern online and social media activities. It is not recommended that sub-regions brand themselves as distinctive destinations, but tap into "Ontario's True North" as appropriate, for example as an online call to action.

One of the major tactical recommendations is that the website portal evolve to meet the current needs of a pan-Northern online presence – namely, to make it easier for the consumer to find travel information on Northern Ontario and buy tourism experiences; for more operators to present their product to the consumer; and to create e-marketing opportunities via database sign-ups. A recommendation for a new pan-Northern site was presented as part of the planning process, but due to a significant investment already made into the Northern portal and its functionality, the current site will remain as the platform for a centralized pan-Northern online presence. The recommendations for redevelopment of the site include changes to the inventory of and types of content; to content acquisition; to its functionality and features; and to the management of the site.

Recommendations include management of the portal transitioning to the RTO, while it works closely with OTMPC on the provision of content and to share certain costs. The site would continue to fulfill a portal function (referring users to partner sites), but will move away from a "drive thru" focus to a "one stop shop" providing a basic overview, travel ideas, geographic orientation, and booking capabilities. Those considering travel to Northern Ontario will be encouraged to further explore partner sites with an improved understanding of the region's unique selling features, tourism products and geography. Key features would include a reservations system, mapping features, database opt-in opportunities, a "home" for sub-regional promotional activities, a balance of static and dynamic content (and more integration of dynamic content with social media), content generated by the sub-regions and by OTMPC's media relations and spokesperson activities, and enhancement of trip planning tools. The site would also feature new geographic references that are not limited to cities and named regional tourism organizations – the consumer will be presented with options to discover signature landscapes, lakes and rivers, smaller destinations and landmarks.

Tactical recommendations prioritize three other key areas: social media, media relations, and development of corporate sponsorships/spokespeople. Best bet social media channels are identified as Facebook, Twitter, website integrated blogs, YouTube and Flickr. Product-focused social media initiatives will be driven by OTMPC and highlighted on their product program and Canada's Great Outdoors sites, and on the redeveloped Northern portal site. RTO 13 will drive destination-based content that will be tied to the redeveloped Northern portal site. The recommended emphasis on media relations tactics would be managed by OTMPC Northern Office, with tactics including story pitching, media releases, more media tours and press trips across a wider product range, attendance at media marketplaces, and leveraging efforts of OTMPC in Toronto. OTMPC Northern Office would also leverage its track record of developing corporate sponsorships and using paid spokespeople (e.g. Babe Winkleman) by applying more resources to create "buzz" and reach the consumer in innovative ways, looking outside of the box for spokespeople (e.g. Rick Mercer, Russell Peters), applying the effort across all product programs, and creating online and social media content (blogs, videos, etc.)

To enhance/augment the product-focused tactical strategies of the Northern office and more localized efforts of regional and city tourism organizations, it is recommended that the sub-regions focus on incremental marketing activities traditionally beyond the budgets or mandates of existing tourism organizations. These include the marketing of products that cross traditional geographic-based or marketing boundaries; marketing of emerging products with broad/significant economic impact; marketing of best bet, niche products under-served by existing marketing efforts or available resources; time-bound marketing campaigns with broad impact; initiatives best executed (due to scope and size) by an agency of record; initiatives that reduce duplication and marketing costs; and "experimental" marketing initiatives. The sub-regions are also encouraged to focus on "best bet products" and to refresh the approach to traditional marketing tactics – addressing multiple print publications via consolidation; developing new, high quality publications; and enhancing consumer show participation through integrating media relations and e-marketing.

Who will plan and deliver Northern Ontario tourism marketing efforts?

Recommended roles and responsibilities for marketing are designed to minimize duplication and maximize resources (each organization should "go where others cannot go and reach where others cannot reach", based on a match to their resources and skill sets); augment and enhance (fill any gaps in current marketing efforts); and plan together (OTMPC Northern Office would participate in RTO sub-regional planning efforts and share their annual plan to highlight opportunities for co-ordination and cost sharing).

OTMPC can focus on the unique product offerings of the region (outdoor experiences and great water assets), while the RTO can identify high-potential unique tourism product and develop regional strategies to coordinate programming around best bet products and destinations; package regional tourism experiences and services for tourists; and prioritize niche product opportunities with the highest potential to attract tourists for future development. The RTO will redevelop the regional, pan-Northern online strategy and manage it in conjunction with OTMPC, helping consumers explore the regions and book online.

RTO sub-regional marketing will be managed by one lead city and one lead regional organization in order to ensure that current marketing expertise and skill sets are leveraged and efficiencies realized in administering and implementing marketing activities.

How will we know if we are succeeding?

Unfortunately, statistics about visitation from specific markets are not available in a timely fashion to evaluate progress, but we can track/measure the success of marketing tactics to determine what is working (e.g. web analytics, media relations and social media outcomes, overall campaign results). A key measure for success for RTO 13 will be tourism operator participation in marketing programs, and the adoption of a pan-Northern reservation system will assist in better tracking of both lead generation and conversion from marketing programs.

A. Project Overview, Objectives and Methodology

A. Project Overview, Objectives and Methodology

1.0 Project Overview

- In the spring of 2007, a new tourism strategy for Northern Ontario for 2008-2012 was developed, led by the Strategic Development and Marketing Partnership for Northern Ontario.
- At the beginning of 2011, RTO13, in partnership with the Northern Office of OTMPC, and on behalf of the Northern Ontario tourism industry, looked to develop a "second generation" marketing strategy for 2012-2017 to grow and develop tourism in the region.
- This plan will form the basis for successful working relationships among its three sub-regions and industry stakeholders.
- The strategy forms only one part of a future destination development plan.

2.0 Project Objectives

- Look to build on the success of the existing strategy in order to "retool, refresh and reposition" the marketing strategy for the next five years – bringing to it the context of current and foreseeable tourism needs.
- Define a roles and responsibilities framework for tourism marketing by tourism industry stakeholders, specifically articulating the role of RTO13 in the marketing hierarchy.
- Identify vertical, cluster, pan and inter-regional marketing opportunities based on existing and planned stakeholder initiatives – evaluate and prioritize.
- Develop a pan-Northern marketing strategy that clarifies and aligns.
- Provide an effective approach to implementing recommendations, allowing various marketing activities to align and cascade without duplication for the best use of marketing dollars.
- Expect stakeholders to use the strategy as a framework when planning and funding marketing strategies/efforts.

3.0 Methodology

The following methodology was adopted in the development of the Plan:

Phase One: Review and Assessment

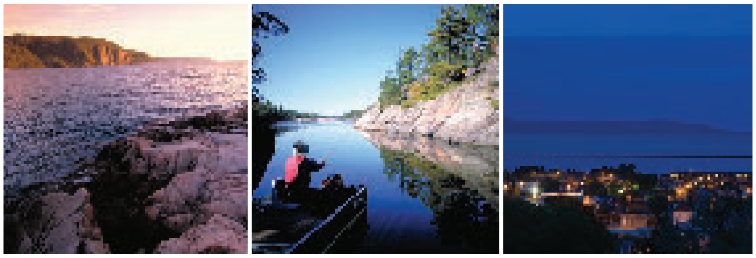
- A review was undertaken of the existing Northern Strategy, current tourism marketing landscape, current marketing initiatives in place, new challenges and issues, Sorbara review, and other existing research. A summary of documents consulted is found in EXHIBIT ONE.

Phase Two: Structure

- A review was undertaken of by-laws, mandates and organizational structures of stakeholders in order to address roles and responsibilities for all levels of marketing efforts, along with planning processes and timelines; and prioritizing goals, objectives and timeframes.

Phase Three: Engagement

- A workshop was conducted in Sault Ste Marie to bring stakeholders together at the strategy development stage (this included the Board of RTO13, made up of representatives of regional, municipal and sectoral tourism organizations, municipalities, and operators; RTO staff, OTMPC, OTMPC Northern Office, Ministry of Culture, and FedNor).
- A series of 29 one-on-one phone interviews was conducted with tourism industry stakeholders throughout North, representing government agencies, regional organizations, municipal tourism organizations, and sector organizations. A list of respondents to the telephone interviews is found in EXHIBIT TWO.
- A series of 15 one-on-one phone interviews with tourism operators, constituting 5 operators per sub-region and representing a cross-section of suppliers was conducted. A list of respondents to the telephone interviews is found in EXHIBIT TWO.
- An online survey was widely distributed to and conducted with tourism operators throughout Northern Ontario, and was completed by 159 operators. The survey instrument and results are found in EXHIBIT THREE.
- A series of two on site sessions and one teleconference session were held with RTO Board members on a sub-regional basis to solicit feedback on recommendations.
- A series of teleconferences with OTMPC, RTO Board, RTO Board Executive and the Northern Committee were held to solicit feedback on recommendations.



Phase Four: Marketing Strategy

- Based on previous phases, a five-year strategy was developed that addresses:
  - Financial resource allocations
  - Markets
  - Tactical strategies
  - Measurement and research

Phase Five: Implementation and Communication

- A strategy to assist the RTO 13 Board, sub-regional organizations, OTMPC, and other stakeholders to successfully implement the plan was developed (seen in separate document, Communications Plan).

B. Situation Analysis

B. Situation Analysis

1.0 Impacts of Previous Five-Year Northern Ontario Tourism Marketing Strategy (2008-12)

In the spring of 2007, a new tourism strategy for Northern Ontario with a five year outlook was developed. *The Five-Year Northern Ontario Tourism Marketing Strategy* (2008-2012) was led by the Strategic Development and Marketing Partnership for Northern Ontario.

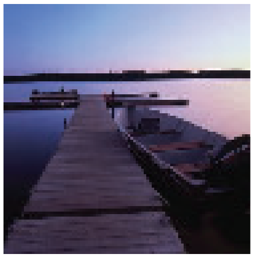
1.1 Recommendations

The 2008-12 strategy made important recommendations in the areas of industry structure and roles, target markets, products, branding and marketing tactics, as follows:

Objectives and Goals	Return to pre-SARS (2002) levels by 2012 as outlined in the following goals: ▪ Increase visitation to Northern Ontario to 23.4 million person nights and 11.0 million person visits, an increase of 2.2 million person nights and 1.2 million person visits over 2004 levels. ▪ Increase visitor spending in Northern Ontario to $1.8 billion annually, an increase of $67 million over 2004 levels; and ▪ Extend average length of stay to 3.7 person nights per overnight person visit.
Industry Structure and Roles	Identified OTMPC as the lead tourism marketer for Ontario and its North. Defined a new way of working together that aligned efforts of players rather than duplicating them – moving from many voices and many messages to one voice, aligned and coordinated in a cascading approach. Recommended a move from a competitive and uncoordinated effort to an aligned and cooperative effort with clear roles and responsibilities, in short: CTC – Builds interest in visiting Canada. OTMPC – Builds awareness and interest in Ontario. OTMPC Northern Office – Presents compelling reasons to visit Northern Ontario. Cities/NORTAs/DMOs/Associations – Interests consumers in a specific product, experience category or destination. Provide in market support and information. Suppliers – Market their offer to leverage the Northern Ontario brand, close the sale and fulfill the promise by welcoming visitors and providing the experience they signed up for.

Target Markets	OTMPC to focus first on "best bet target groups" and "best bet markets"; on avids; and on new markets. Move from geographic markets to consumer segmented, targeted marketing. MC&IT efforts directed to core OTMPC for integration with their MC&IT initiatives. Based on a two-corridor strategy – Northeast and Northwest. Defined "best bet" target groups: ▪ Avids, nature consumers seeking rest and respite, often travelling in social groups. ▪ Boomers, empty nesters, urban adventure travellers seeking relaxation, rejuvenation, and discovery. ▪ Families seeking "easy to buy and use" outdoor adventures, child-friendly family bonding time. ▪ Young urban professionals, singles and couples, seeking respite from fast lifestyle seeking unexpected and new adventure experiences. Recommended "best bet" markets: ▪ For Northwestern Ontario: Southern Ontario (excluding GTA), Manitoba, and near-border US. ▪ For Northeastern Ontario: Greater Toronto Area/Golden Horseshoe, Quebec, and Northeast U.S.
Products	OTMPC to continue to invest in four core experiences: angling, hunting, nature/adventure, and recreational motorsports. Up to rest of industry to deliver a quality experience that will entice them back to Northern Ontario ("goes without saying"). Based on a two-corridor strategy – Northeast and Northwest.
Branding and Positioning	OTMPC Northern Office gets people intrigued and interested in Northern Ontario as a tourism destination using "Ontario, Canada's Great Outdoors" to lead. Branding of Northern Ontario is to be integrated with OTMPC core branding – "There's no place like this…Ontario, Canada's Great Outdoors". "Ontario, Canada" is to be used in all positioning to support cascading, to position Northern Ontario within the search process to emerge as a destination of choice. To cascade well, partners were to position the destination, region or city and its product offering within the brand of the next higher tier.

Marketing Tactics	OTMPC: ▪ Provide support and guidance for industry in the form of tools that everyone can use, to help align efforts under the overarching strategy. ▪ To consolidate tactics in fewer best bet markets. ▪ To build one Internet window for Northern Ontario to generate interest and buzz on the web. Up to the industry to answer questions, close the sale and move people around once they have arrived. ▪ Move from reliance on print publications to Internet and Interactive channels; use print as lure. ▪ More strategic use of consumer shows – "consumer touch". Rest of industry to engage in: ▪ Internet/Database ▪ Consumer Touch – beyond consumer shows ▪ Public Relations ▪ Familiarization Tours ▪ Publications and Collateral – up to rest of industry to produce in-market materials such as maps and visitor guide books ▪ Co-op Marketing ▪ Brand Promotion – TV, Radio, Print ▪ Tools: OTMPC partners to be provided style guide, web specific tools, logos, images and phrasing for use to position within the strategy of the next highest tier.

1.2 Outcomes

The OTMPC Northern Committee and OTMPC Board of Directors supported the strategy and its implementation, and its recommendations led to significant changes in the tourism industry structure and the roles and responsibilities of tourism organizations as it pertains to marketing:

- OTMPC partnerships were developed with very specific deliverables, and were reviewed annually, based on each organization's ability to deliver.

- OTMPC developed a clear and singular focus on strategic marketing; it worked with partners on foundation tools, capacity building/training, and supplier development.

- NORTAs/NOTO/Direction Ontario/Ontario's North redefined contractual arrangements to support the implementation of strategy; no funding of marketing programs were conceived or implemented by other parties.

- Six regional tourism marketing associations (NORTAs) continued to work with their collective 1,052 members to deliver marketing programs. Five major cities continued to market their respective cities.

- These partner organizations executed branding activities, but also acted as portals to detailed destination information, enquiry handling and fulfillment.

The following items were identified during the industry survey process with regard to an analysis of the outcomes, impacts and successes of the previous strategy:

- The strategy tried to ensure there was no duplication in the same markets. This objective of coordination, alignment and removing duplication is still important, although some stakeholders believe there is still a long way to go to achieve it as outlined in the plan.

- The plan correctly identified the need for additional resources to market Northern Ontario (which has now been achieved via funding available to the RTO as outlined below).

- At the same time, many feel that available resources were not sufficiently taken into account. For example, the strategy did not recognize the large funding gap between the top level of the cascade and the "implementers", and some of the tactics outlined were felt to be an unrealistic match to the skill set and capacities of the various organizations involved. Some NORTAs have proven more financially stable than others, and sustainability continued to be an issue and limit program delivery. Delivery mechanisms and DMO weaknesses therefore limited the fulfillment of all aspects of the plan.

- The strategy successfully created a more coordinated process with groups working together – for the first time, a planning process resulted that involves OTMPC, the OTMPC Northern office, and the NORTAs. At the same time, some contend that the concepts were excellent but the plan assumed cooperation between organizations which was perhaps unrealistic, resulting in roles and responsibilities that did not emerge as intended because cooperation was lacking amongst the larger industry.

- The plan effectively positioned Northern Ontario for the first time in terms of its brand personality and spoke about the product in an experiential way. It defined Northern Ontario competitively, defined what visitors feel when they visit, and established the great outdoors as the unique selling proposition (USP) for Northern Ontario.

- The plan correctly focused on best bet products, with the idea of flagship products representing the whole. It also underlined the fact that product development is crucially important to the success of the industry in Northern Ontario.

- Many felt that the information on consumer "segments" was flawed and as a result call in to question the plan's conclusions on best bet markets. It has also been noted that because of resources, the focus in the implementation of the plan ended up being on "old clientele" and the traditional U.S. border States, rather than on some of the new markets that were recommended.

- The plan recognized two rather than three regions within Northern Ontario which was problematic. North Central Ontario needed to be recognized as a distinct area with its own unique geographic markets and products.

- Buy-in to such a plan is very important, but most operators, even engaged ones, were unaware of the strategy and there was a lack of a feeling of ownership from this part of the industry.

- No outcomes/measurements appear to be in place to determine the actual success of many of the recommendations - measuring success and tracking results did not really happen.

It is interesting to note that many industry stakeholders felt that the strategy did not appear to have been considered in the Sorbara report (discussed below) or in the consultations surrounding the development of that report.

2.0 Key Changes in the Tourism Environment Since the Previous Strategy

The following key changes to the tourism environment need to be considered in the development of a refreshed strategy.

2.1 Impacts of the Discovering Ontario Report

2010 marked the beginning of a fundamental policy shift in the management of tourism in Ontario with the first of twenty recommendations of the Ontario Tourism Competitiveness Strategy, based on Discovering Ontario: a report on the future of tourism (also known as the Sorbara report), entering the implementation phase. That recommendation called for the establishment of thirteen new tourism regions in the Province, grouping geographic regions around common experiences and common visitor markets (see EXHIBIT FOUR). The Ontario Tourism strategy focuses on four pillars: Marketing, Product Development, Skills Development and Investment Attraction. The tourism strategy is funded through a 3% increase in accommodation tax that returns $65 million annually to the regional organizations until March 31, 2012 and $40 million annually thereafter.

It is the intention of the Competitiveness Strategy to reduce the duplication of tourism marketing and management functions that currently exist among the hundreds of tourism organizations. It is the further intention to improve alignment and coordination of human and financial resources to improve efficiency in reaching consumers by ensuring the development and promotion of quality, relevant visitor experiences. Northern Ontario was defined as one region based on its significant outdoor visitor experiences and divided into three sub-regions, respecting the variations in visitor markets that exist between northeast, north central and northwest.

Most germane to the development of the refreshed Northern Ontario Tourism Marketing strategy are the report's recommendations in terms of industry structure, roles and responsibilities and marketing, particularly as it relates to the creation of DMMO's (Destination Management and Marketing Organizations), currently referred to as RTOs (Regional Tourism Organizations):

- A lofty target.
  The report suggests that Ontario should set its sights on becoming one of the world's preferred destinations and a leading global destination, so that by 2020, Ontario will aim to increase the economic contribution of the sector by doubling tourism receipts.

- The establishment of regions.
  Ontario should establish tourism regions to better coordinate tourism marketing and management across the province. Each region should work toward creating a unique brand and a stellar experience within a provincial brand. There should be one RTO for each region. The report recommended equipping RTO's with the

capacity to create and implement regional tourism strategies that include marketing and research; product development and packaging; setting investment attraction and infrastructure priorities; identifying training needs and priorities; and setting quality standards. RTOs are encouraged to develop partnerships and col laborate with municipalities, chambers of commerce and other local groups that support tourism.

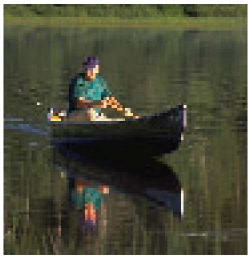
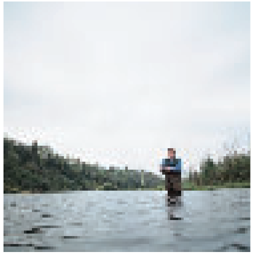
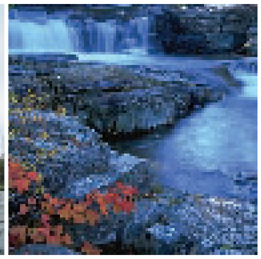
- Redesigning marketing roles.
  The report outlined an approach to tourism marketing with one agency becoming the provincial marketing lead for promoting the provincial tourism brand in partnership with the new tourism regions. It suggests creating a provincial brand to be used by RTOs, while the province works closely with them to target the markets that make the most sense for each region.

- Strategic marketing of unique products.
  Ontario should market its destinations and experiences by focusing on its strongest existing international markets (prioritizing new and best-prospect markets; strengthening its appeal to French-speaking markets, especially Quebec; expanding reach to new Canadians and their families; and continuing to focus on the strong domestic Ontario market). Ontario should focus on the unique product offerings of regions including natural experiences and our great water assets as well as niche tourism experiences such as sports, culture, culinary, eco- and agricultural tourism. RTOs should identify high-potential unique tourism product in each region and develop regional strategies to coordinate programming around centerpiece attractions. They should also package regional tourism experiences and services for tourists (e.g., sporting events, hotels, restaurants) and prioritize niche product opportunities with the highest potential to attract tourists (e.g., culinary, sports, eco-tourism) for future development.

- Marketing tactics.
  Improving way finding, e-marketing and online booking are all prioritized in the report. It recommends that the industry should increase internet marketing and online booking capabilities. Through its marketing agency, the Ontario government should work with industry to make it easier for consumers to book accommodations and visit attractions. Regions should develop a regional online strategy within the provincial one, which helps consumers explore the regions and book online.

As a direct result of the report, there have been numerous and significant changes to the structure of the tourism industry in Northern Ontario:

- There is a newly established Regional Tourism Organization – RTO 13.
- It is the only region divided into sub-regions (13A, 13B, 13C) due to geographic size and the North's unique marketing and travel corridors.
- This allows for the coordination of activities at a regional level while sub-regions allow local industry to develop marketing initiatives tailored to a specific sub-region.

- The RTO is defined by its mandate – it is not a marketing organization; its role is instead to coordinate and support tourism marketing efforts within the sub-regions, and align those marketing efforts with activities and initiatives of other stakeholders.

2.2 Available Financial Resources for Northern Ontario Tourism Marketing

- With funding being provided to the recently established RTO 13 on an annual basis via transfer payment agreements with the Ministry of Tourism and Culture, the overall budget for marketing tourism in Northern Ontario and the financial resource base for the strategy is significantly larger than that available when the previous strategy was developed.
- Total funding for RTO 13 in 2011 stands at $4.225M; for 2011/12 onward, funding over and above that required for administration will be allocated to supporting activities in each of the four pillars.
- RTO 13 will continue to allocate individual marketing budgets to the sub-regions (RTO 13A, 13B and 13C); however, in future this marketing budget amount will be reduced after dollars are allocated to the other three pillars (product development, training and investment attraction). It is anticipated that in addition to marketing, significant dollars will also be allocated going forward to the other three pillars (which will be addressed in a future Destination Development Plan).
- The new RTO structure has resulted in destination marketing fees being lost by some of the cities in Northern Ontario. This was identified as an issue during the planning process, but addressing the issue is not considered to be within the scope of the plan.
- Commencing in 2012/13, RTOs will have the ability to introduce a regional tourism levy (RTL), up to 3%; the adoption of the levy would be determined by each sub-region and would encompass all fixed-roof accommodation. The advent of one or more RTLs would have a significant impact on the scope and scale of RTO 13 operations.
- The core budget allocated to the Northern program (or OTMPC Northern Office) by OTMPC will continue at a level of 10% of the total core budget of OTMPC.
- It is likely that the OTMPC Northern Office will have phased out its existing Northern partnership agreements (MOU's or fee for service agreements) with the cities and regional tourism organizations by the time the plan is in effect.
- There is potential for the $1.3M currently allocated for Northern partnerships to be reallocated to Northern experiential marketing campaigns (versus application-based partnerships) – and for OTMPC to work with its partners to develop a revised program that is mutually agreeable.

- In place of current partnership agreements, it is likely that OTMPC Northern Office may continue to allocate a portion of its budget to implement programs with those organizations and suppliers best positioned to provide services via some type of competitive procurement process.
- The likely elimination of the MOUs between the OTMPC Northern Office and partners will have a significant impact on the fiscal sustainability of some tourism organizations.
- Because the budget for the OTMPC Northern Office's Northern Portal website was largely associated with the partnership agreements which provided for content creation, the OTMPC Northern Office will likely have the ability to reallocate much of the current budget for this major online initiative to other efforts

2.3 Tourism in Canada and Ontario

Trends in global tourism and in tourism in Canada and Ontario are outlined in EXHIBIT FIVE. An Environmental Scan of the tourism operating environment as it pertains to tourism in Ontario is found in EXHIBIT SIX.

2.4 Who Visits Northern Ontario?

It should be noted that when the previous strategy was developed, a significant amount of current secondary market research was available for analysis in terms of visitation to Northern Ontario, consumer segments, and travel motivations. Since the previous strategy, none of these secondary studies have been refreshed to provide more current information.

Rather than utilize research dating back to 2007, this plan instead relies on the most recent research available – which is limited to statistical data that provides information on visitation to Northern Ontario in terms of volume, value and characteristics (the 2008 data from Statistics Canada's *Canadian and International Travel Surveys* and *Regional Tourism Profiles,* as presented in the FedNor report, *Tourism Volume, Value and Characteristics of Northern Ontario, 2008)*, the *Tourism Performance Bulletins (December 2010 and February 2011)* and the 2010 and 2011 *Travel Intentions Surveys.* The information reveals recent trends in visitation in comparison to the past, as well as forecasting the future.

2.4.1Overall Visitation to Northern Ontario

- Tourists made 6.9M same-day or overnight trips in Northern Ontario in 2008. These trips represent about 7% of all tourism in Ontario that year.
- There has been an overall drop in tourism activity, likely due to relatively poor economic conditions. Same-day and overnight visits to Northern Ontario fell about 10% between 2007 and 2008 (versus 4% for Ontario as a whole); the US market dropped sharply, from 1.5M person visits in 2007 to 1.1M in 2008.
- Visits from parts of Canada other than Ontario dropped 16%; the Ontario market had a 4% decline, but because of the large size of the market, represented a drop of 227,000 visits.
- While spending increased slightly (3%), nights spent fell by 4%.

It should be noted that some of the apparent decline could be a function of methodological changes that Statistics Canada implemented between 2007 and 2008. These numbers include both same day and overnight visits.

According to the December 2010 Tourism Performance Bulletin, significant resources are being spent on tourism marketing to US markets but tourism volumes from the US are relatively low other than in the North-West region. Economic indicators show that the Canadian economic recovery continues, but slowly - consumer confidence was flat in 2010 while tourism and overall employment is marginally increasing; and consumer confidence was largely unchanged by February 2011. Recovery is much slower in the US; as of December 2010 consumer confidence was on the decline, while it increased slightly in February 2011.

2.4.2 Volume of Tourism and Tourism Spending in Northern Ontario

The most recent data available, from the 2008 *Canadian and International Travel Surveys and Regional Tourism Profiles* reveals:

- 60% of tourists are overnight visitors; of these, Canadians account for over four fifths of overnight visits at 82%, US visitors account for one in six overnight visits at 17%, and overseas accounts for 1%. 61% of these overnight trips were for pleasure; 29% VFR, and 5% for business.
- Of all of the overnight person visits, Northern Ontario itself accounted for 34%.
- Canadians generate the largest share of total visitor spending (67%) on overnight trips; but in terms of average spend, US overnight visitors spend more than Canadians or overseas visitors (almost twice as much – U.S. has a $99 average spend versus a $53 Canadian average spend per person per night; overseas spend average is $60).

- Americans also provide a much higher yield on a per trip basis because of larger party size and longer duration of stay. An overnight trip yields $1277 for every U.S. travel party attracted to the region, but reached only $322 for each Canadian household travel party. Note that many overseas visitors stay with friends and relatives – which could explain why their spending is lower than that of the U.S.

2.4.3 Geographic Origin for Overnight Trips to Northern Ontario

Based on data from the 2008 Statistics Canada *Regional Tourism Profiles*:

- Ontario is the primary source of overnight tourism for Northern Ontario in total, as well as for each of the three regions – accounting for close to three quarters of overnight tourists.

- About 34% are residents of Northern Ontario travelling from home to other locations in greater region.

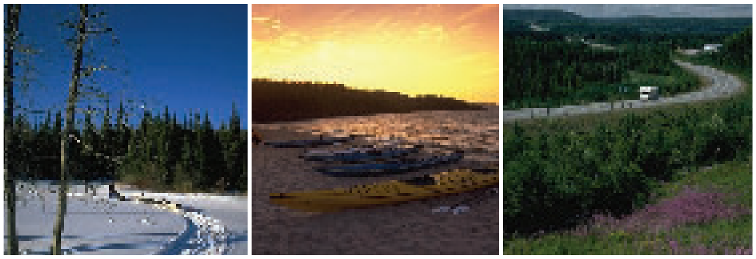
- Apart from Northern Ontario itself, Toronto is the largest urban feeder market, representing 1/7 of all overnight tourism in 2008 (and about 2/3 of those were pleasure trips).

- Winnipeg is the next largest source of overnight visitors from Canadian urban markets outside Northern Ontario, contributing 6% of overnight tourists in 2008.

- Quebec accounted for 1%.

- Most Americans who take overnight trips live in states along the border (72%). The most sizable contributions to visitation come from Minnesota, Michigan, and Wisconsin.

- Overseas visitors are primarily European, dominated by the UK (32%) and Germany (20%).



2.5 Who Visits the Sub-regions in Northern Ontario?

The most recent statistical data available that provides information on visitation to Northern Ontario separated by sub-region is the 2008 data from Statistics Canada's *Regional Tourism Profiles.*

2.5.1 Overall Tourism Activity by RTO Sub-Region

The overall tourism activity in Northern Ontario can be broken down on the basis of the three RTO sub-regions, North East, North West and North Central, as follows:

	North East	North West	North Central
Volume of same day trips	59%	25%	16%
Volume of overnight trips	44%	38%	18%
Spending for overnight trips	42%	44%	14%

2.5.2 Geographic Origin for Overnight Trips by RTO Sub-region

- North-West:
  This is the only region for which its own boundaries and other Northern Ontario is not the largest group for overnight trips, at 25%; Winnipeg (22%) is a major contributor. The U.S. is also major at 34%, with Minnesota most prominent at 25%.

- North-East:
  Almost half (43%) of overnight trips come from residents of Northern Ontario, mostly residents of the North-East. The U.S. represents 7%. Southern Ontario, including Toronto, and the Waterloo, Simcoe and York Regions make up 14%.

- North-Central:
  Ontario residents dominate at 36%. The U.S. represents 30% of travellers, led by Michigan (12%) and Ohio (4%). Southern Ontario, including Toronto, Simcoe and Halton account for 11%.

2.6 What Do Visitors Do in Northern Ontario?

Based on data from the 2008 Statistics Canada *Regional Tourism Profiles:*

2.6.1 Trip Purpose and Travel Party Composition of Overnight Visitors by Sub-Region

- Northern Ontario:
  Pleasure trips account for two thirds of all overnight spending; generally, overnight travel parties include two adults on average, and no children or teenagers (83% of overnight trips are adult only).

- North West:
  Pleasure trips account for 57% of all visitor trips.

- North East:
  Pleasure trips account for 47% of all visitor trips.

- North Central:
  Pleasure trips account for 62% of all visitor trips.

2.6.2 Lodging Types for Visitors to Northern Ontario

The 2008 Data from the *Canadian and International Travel Surveys* provides information on overnight visits by lodging type for Northern Ontario:

- Northern Ontario:
  - The average stay is 3.9 nights (Canadians – 3.5 nights; US – 5.4 nights; overseas – 6.2 nights). Canadians account for 74% of person nights.
  - The domestic market has a high incidence of staying with friends and relatives (33%), or in their own cottages (34%). The U.S. market stays in commercial cottages and cabins (39%) or private cottages (18%). Almost half of the nights of overseas visitors are spent in private residences (43%).

The 2008 Data from *Regional Tourism Profiles* provides information on overnight visits by lodging type for the RTO sub-regions:

- Sub-regions:
  - There are more nights spent in the North East than in North West or North Central; 23% of these nights are spent in paid roof lodging. Most nights are spent in private homes or cottages (4 million nights vs. 1.4 million).
  - The North West has the highest number and proportion (32%) of nights in hotels, motels, and other roofed commercial lodging. Almost half of the nights (48%) are spent in private homes and cottages.

- As in the North East, North Central's overnight tourists tend to stay with friends/relatives, or in their own cottages (61% spent in non-commercial lodging).

2.6.3 Activities on a Trip

2008 Data from *Canadian and International Travel Surveys* and *Regional Tourism Profiles* provides information on activities on a trip for overnight visitors:

- Northern Ontario:
  - Is clearly associated with outdoor experiences.
  - The most popular experiences are boating/canoeing/kayaking; fishing; camping; and going to a nature park.
  - Hunting was ranked ninth as an activity on a trip for overnight visitors.

- Sub-regions:
  - North West: Has the highest participation in outdoor activity at 67%. 40% go fishing, 33% go boating, and 15% go to nature parks.
  - North East: 50% participate in an outdoor activity. Top three activities are boating (25%), fishing (24%), and going to a nature park (10%).
  - North Central: 51% participate in an outdoor activity. Boating, nature parks and fishing are equally popular among tourists to region. The top four activities are boating (28%), fishing (24%), going to a nature park (23%), and historic sites (18%).

2.7 Who Intends to Travel in Northern Ontario and Why?

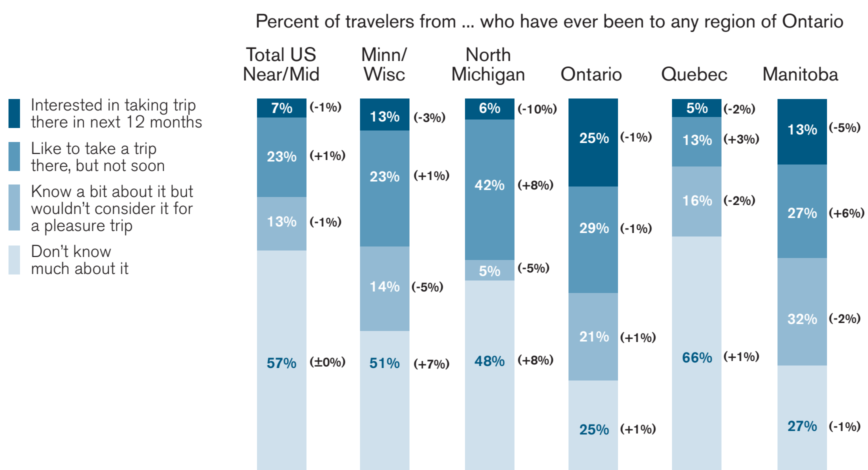
Information below is sourced from the *Travel Intentions Studies* (March 2010 and March 2011).

- Weakness of US market:
  General interest in overnight travel has waned in the U.S. due to a deeper recession, weak American dollar, and the passport/border issue, and there are generally fewer American travelers compared to previous years. Economic factors do appear to be easing slightly but cost/budget concerns are still the main constraint on travel intentions and there is a basic decline in commitment to travel in the U.S. It is also noted that future travel intentions among Americans could be significantly affected by cost issues associated with exchange rates and gasoline prices and that there are specific concerns that persist as impediments to choosing Ontario, associated with passport requirements and border-crossing difficulties. At the same time, the study points out that Ontario could prepare itself to ride the wave of growth when the U.S. economy improves, and some attention might be paid to non-traditional U.S. markets that are likely to recover more quickly.

- Domestic market:
  The domestic market continues to be buoyant, and domestic support of tourism appears well entrenched; however, there is vulnerability as the economy improves (which could lead to the domestic market having an appetite for more exotic travel). Overall domestic demand is more robust than that in the US and future travel intentions are strong. In terms of travel rationale within the domestic market, trends include the major impact of VFR, and the loss of lustre for "nature" as a motivator.

- Interest in Northern Ontario:
  The most recent survey of those who have visited Ontario before shows the interest in different geographic markets in visiting Northern Ontario in the next two years.

Familiarity and Interest – Northern Ontario as a Travel Destination (Feb '11)



( ) Figures in brackets = change vs. Feb '10
Q22F. Which of the following statements best decribes your familiarity with, and interest in, Northern Ontario as a destination for pleasure travel?

Source: 2011 Travel Intentions Survey.

24% of Ontarians are very interested in taking a trip there, 8% of Manitobans, 6% of those from North Michigan, 4% of those from Quebec, and 3% of those from Minnesota/Wisconsin. In key cities, 22% of those from Toronto said they were interested, compared to 5% from Minneapolis/St. Paul and 2% from Chicago.



- Reasons for being "very interested":
  When those who were very interested in visiting Northern Ontario in the next two years were asked why, Americans' top reasons were don't know (29%), attractive scenery/landscape (8%), good for fishing (7%), and curiosity in exploring (7%). Canadians said visiting friends and family (10%), attractive scenery/landscape (8%), and good for fishing (8%).

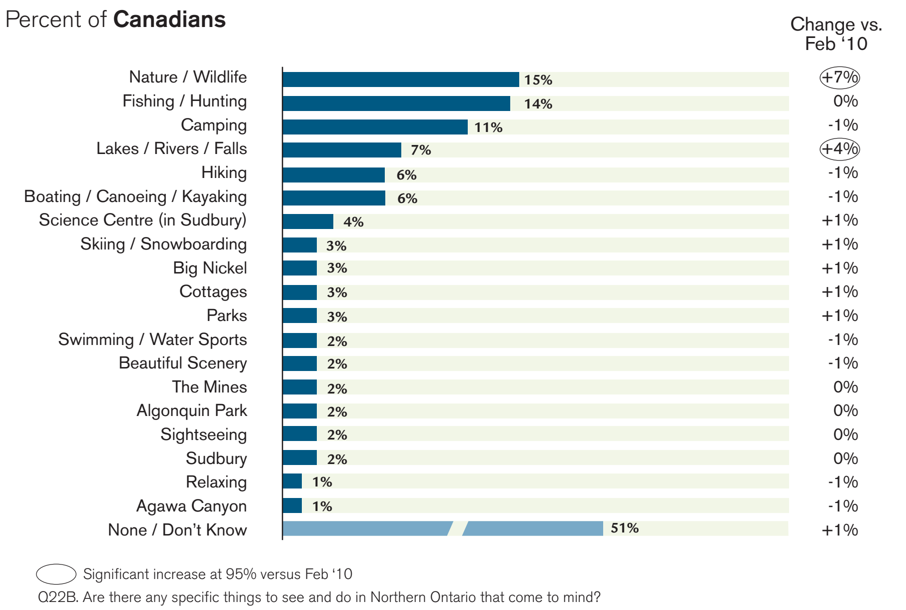
  When those familiar with Northern Ontario were asked about their interest in visiting within the next two years in order to experience specific attractions, a significant number of both American and Canadian respondents cited both the Agawa Canyon Tour Train and Science North/Dynamic Earth; 62% and 55% of Canadians respectively are very/fairly interested in these attractions. For those who have no interest in visiting Northern Ontario, the main objection cited was "boring", for 20% of respondents, and "preference for other destinations" and "weather/too cold" also scored high.

- Image of Northern Ontario:
  Travelers with some understanding of Northern Ontario were asked to rate it as a pleasure travel destination based on specific characteristics. The average rating for pleasure travel has remained relatively static over the last three years, at 6.2% for Americans and 7.2% for Canadians. There is very little difference in the scores for different characteristics of pleasure trips, with similar scores for "enjoying nature and the outdoors", "for fishing", and "for hunting". "Good for resort trip" and "good for touring" scores slightly lower by about a point.

  When asked what experiences Northern Ontario offers that are "unique and different", the top ranked responses were "nature", at 28% (net); "outdoors/wilderness", at 14%; and "lifestyle", at 11%. Notably "fishing" was mentioned by 8% and 50% answered "don't know".

- Awareness of “things to do”:
  Amongst those who are aware of Ontario, unprompted awareness of things to see and do in Northern Ontario is very low.

Unprompted Awareness of Specific Things to See And Do in Northern Ontario (Feb ‘11)



Source: 2011 Travel Intentions Survey.

Only 7% of Americans provided an unprompted response of “fishing/hunting” or “nature/wildlife viewing”. Most Americans’ unprompted response was “none/don’t know”, stated by 56% of those from Chicago, 49% from Minnesota/Wisconsin, 47% from Minneapolis/St. Paul and 37% from Northern Michigan. Canadians’ unprompted awareness of specific things to do is a little higher, with 15% responding with “nature/wildlife”, 14% with “fishing/hunting”, 11% with “camping” and 7% with “lakes/rivers/falls”. Fewer than 4% of respondents mentioned “beautiful scenery”, “relaxing”, “Agawa Canyon”, “sightseeing”, or “swimming/water sports”. Again, a significant number, 51%, answered “none/don’t know”.

2.8 Marketing Tactics

A number of developments have occurred since the previous strategy that can impact the choice of, emphasis on, and execution of specific marketing tactics going forward.

2.8.1 Internet

According to the latest Travel Intentions survey, the Internet continues to be an important planning tool. Making it easy for consumers to access information and plan their trip is imperative in this highly competitive environment. The widespread use of the Internet allows the consumer 24/7 access to information. The web has become the number one planning tool, surpassing even word of mouth. Consumers can be lured to take a trip to other destinations based on the information and the images presented at the travel websites, the ease of use of the website, and the opportunity to book the trip.

Canadians are using the Internet more often than in the past for trip planning and booking, with the added perception that "good deals" may come in conjunction with online trip planning. According to the survey, Canadians are perhaps driven more by discounts than they were in the past. This trend toward use of the Internet as a source for comparison shopping or for purchasing "travel bargains" is a positive one, in that it would indicate more travellers using the Internet with intent to buy.

2.8.2 Social Media

Another important trend is the increasing importance of social media marketing and its influence on the travel decision. Particularly for the younger generations, there is a shift away from traditional to social media and they spend a significant amount of time with this new form of communication. Reaching opinion leaders and tapping into the power of social networks requires a different approach from marketers, involving the consumer in the marketing process.

There have been many developments in this tactical area:

- Increased usage:
  The numbers of users keep climbing for Facebook, blogs, and Twitter, and the frequency of social media use among Internet users is increasing, along with the share of time online dedicated to social media. Canadians are more frequent users than Americans, with 22% of Canadian travellers using it at least once a week.

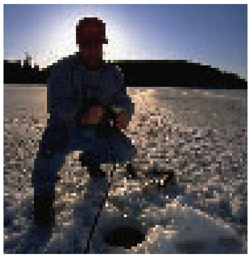
- Reasons for using and likelihood for travel purposes:
  There is a significant likelihood of using social media for travel related purposes. New tools for travellers are being developed and the importance of travel influencers is growing. Among Canadians, 19% solicit travel advice on social networking sites; 36% read user reviews posted on travel specific sites; 22% subscribe to an online travel newsletter; 22% join a Facebook fan page belonging to a travel destination or attraction; 16% blog about recent travel; and 29% post trip reviews on sites where you have control over who sees the post.

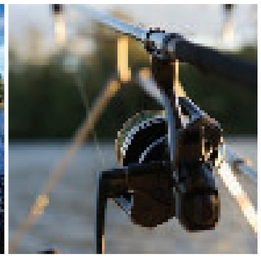
- Influence of social media:
  The influence of social media sites among social media users is significant. The percentage of Canadians who said it was very influential for travel purposes included 28% when selecting a travel destination; 34% when selecting a hotel or other accommodations; and 33% when determining trip activities or attractions.

Overall, the increase in social media usage indicates a trend toward use of the online medium for the purpose of users connecting with other people, versus using it to look for things. It also indicates that travel consumers and those planning and purchasing trips now rely on third parties to tell them where to look for things and to provide opinions and recommendations on the things that they might find.

2.8.3 Mobile

The use of mobile devices in travel is increasing. By 2014, 142.1 million users, representing 53.9% of the U.S. mobile user population, will access the internet using mobile browsers or applications. Mobile devices play an increasingly important role in travel planning and during the trip as well, from checking in for flights and hotels to accessing information on attractions and restaurants. Accessibility of travel information on mobile devices makes it easy for travellers to be informed, make or change travel plans and get the most value for money on their trip. New ways of consumer communication are emerging and methods such as mobile advertising, user-generated videos and full length professional videos are gaining importance. 3-D content is expected to be the next phase in consumer communication. All this provides great opportunities for marketers to be innovative and attract consumer attention.





3.0 The Current Tourism Marketing Landscape

3.1 Organizations Involved in Northern Ontario Tourism Marketing

In addition to OTMPC, through its Northern Office, and the newly established RTO 13, there are a number of primary organizations involved in tourism marketing in Northern Ontario. These are illustrated below by the established sub-regions.

	13A Northeast	13 B Northcentral	13C Northwest
NORTAs	Ontario's Near North Rainbow Country Ontario's Wilderness Region	Algoma Country	NOSTA (North of Superior Tourism Association) Sunset Country
The 5 Major Cities (Ontario's North)	Timmins Sudbury North Bay	Sault Ste. Marie	Thunder Bay

In addition to those named above, there are a number of tourism associations and chamber of commerce involved at a more localized level. A summary of information on these associations including their main product focus and branding approach is found in EXHIBIT SEVEN.

Sector organizations that have a pan-Northern mandate, represent a significant number of Northern Ontario products, and with some mandate involving marketing, include Direction Ontario, NOTO, and Ontario Parks.

3.2 Resources and Skill Sets

The key marketing stakeholders in Northern Ontario are currently engaged in a variety of marketing efforts and deploy a wide range of resources and skill sets in order to do so.

Organization	Notable Marketing Resources and Skill Sets
OTMPC	Significant budget to market pan-Ontario product that correlates with Northern Ontario "best bet" products. Access to OTMPC media relations department. Ability to leverage the "Ontario brand" to attract corporate partners and high profile spokespeople/endorsements. Within staff group there is significant product expertise, and expertise with partnership building and online and social media strategies. Resources are available to outsource to professional providers as needed for specific tactical areas (e.g. creative and production, social media coordination, content provision, web programming, media relations). Has the resources and experience required to enter new markets in a significant way. In the recent past has partnered with other tourism organizations via MOUs (fee for service agreements) to deliver programs (e.g. website content creation, consumer show staffing, media fam coordination and hosting) in certain markets. Going forward these MOUs are likely to be eliminated and OTMPC will be partnering in a more limited fashion.
RTO 13 (Board and Staff)	Allocates a significant budget for marketing Northern Ontario (also has budget for three additional pillars). Board made up of major tourism stakeholders representing the whole of the region in terms of geography, sectors, and different marketing priorities (products, markets). Staff and Board appointed for the purposes of coordination and administration versus marketing implementation. Budget would allow for the use of agencies or vendors of record to provide professional services as required.

RTO Sub-regions (A, B, C)	Receive significant marketing budget allocations from RTO 13 for the purposes of implementing marketing programs and initiatives at a sub-regional level. RTO 13 Board members and others are engaged at the sub-regional level to work together, representing the whole of the sub-region in terms of destinations, sectors, and different marketing priorities (products, markets). Budget would allow for the use of agencies or vendors of record to provide professional services as required. Organizations that might contribute to planning or executing of sub-regional initiatives vary widely in terms of their available resources, skill sets and mandates.
Cities, NORTAs	Organizations vary widely in terms of their available resources, skill sets and mandates. Some NORTAs serve a healthy number of members and are fiscally sound, while others serve a comparatively small number of members and have significant sustainability issues to the extent that their future status is unknown. The likely elimination of the MOU agreements with OTMPC will significantly impact their financial position. Two of the NORTAs have a significant number of members who are outside the boundaries of RTO13. Some tourism organizations do not have access to members with significant marketing budgets to spend on NORTA programs or membership benefits. The five largest cities in Northern Ontario traditionally do not face sustainability issues given stable funding sources. Of the five cities, some prioritize tourism as an economic driver while others are in transition as this becomes increasingly important; others do not dedicate significant resources to tourism.
Operators	Some have access to marketing programs via a strong regional or municipal tourism marketing organization; others do not. The majority of operators have very small marketing budgets of their own. According to the operator survey, 60% have a marketing budget of less than $10K and only 15% have a marketing budget of $40K+. Many operators are resource-challenged in terms of the time or dollars required to engage in significant marketing efforts. Overall, the quality and calibre of operator web sites is poor. There is a significant lack of online booking capability via operator web sites in Northern Ontario.

3.3 Current Marketing Efforts – Canada and Ontario

The key marketing stakeholders in Northern Ontario are currently engaged in a variety of marketing efforts and deploy a wide range of resources and skill sets in order to do so.

3.3.1 CTC

Organizational Overview

The Canadian Tourism Commission (CTC) is Canada's national tourism marketing organization. A federal Crown corporation, its vision is to "inspire the world to explore Canada" and its goal is to grow tourism export revenues.

With a base budget of $71.8 million for 2011, the CTC is working to stimulate international visitation, since relying on more than 80% of revenue from the domestic market is not sustainable for Canada's tourism industry. With this in mind, the CTC's 2011-2015 Corporate Plan defines a significant strategic shift for the organization.

Strategic Marketing Focus

Some of the key priorities and objectives that will form the framework for CTC activities in the 2011-2015 period include:

- Helping Canada achieve its national tourism revenue goal of $100 billion by 2015. CTC expects to generate an additional $5.4 billion in attributable tourism export revenues to support this target.
- Positioning Canada's tourism brand as a leading experiential brand in the world - a destination where travelers can create "extra-ordinary" personal experiences.

The primary business shift is to international markets; specifically, CTC will cease investment in the Locals Know domestic market campaign of 2009-2010. It will cede leadership in the US leisure arena to Canadian partners, but will remain invested in US marketing activities through meetings, convention & incentive travel (MC&IT), media and public relations and social media.

The CTC has identified five Unique Selling Propositions (USPs) that showcase the experiences that make Canada unique. Some of the experiences can be found elsewhere but, according to the CTC, what makes these five USPs so special is how they happen here in Canada:

- Vibrant Cities on the Edge of Nature
- Personal Journeys by Land, Water and Air
- Active Adventure Among Awe-Inspiring Natural Wonders
- Award Winning Canadian Local Cuisine
- Connecting With Canadians

CTC promotes Canada's outdoor product globally; however, it should be noted that the focus is generally on landmarks, images and experiences outside of Ontario, such as the Rockies.

3.3.2 OTMPC

Organizational Overview

The Ontario Tourism Marketing Partnership Corporation (OTMPC) was established in 1998. Its vision is to inspire consumers to discover Ontario and its mission is to grow Ontario's tourism sector year round by stimulating increased consumer spending and visits and by generating greater partnership participation.

Strategic Marketing Focus

2011-2012 is the first year of a new three-year strategy for OTMPC. With the creation of the RTOs, a strong leadership role has been carved out for the provincial marketer and the industry has been challenged to align and coordinate our efforts.

The OTMPC Program Review outlined a new mandate including: responsibility for developing and implementing the overall provincial marketing strategy; marketing Ontario nationally and internationally; when marketing within Ontario, working with the regions; providing brand leadership; firmly establishing ourselves as the Centre for Excellence in research, best prospect markets and best practices; and, engaging partners.

The focus for the 2011/12 marketing plan is to get closer to the right consumer in a cost-effective manner and create value for the new RTOs across the province. With the recent exit of the Canadian Tourism Commission (CTC) from the United States (U.S.), OTMPC has an opportunity to lead an aggressive marketing strategy for a core target segment.

OTMPC will build on Ontario's uniqueness as a foreign, yet-close and easy-to-travel-to destination for U.S. Near and Mid-Markets by developing a multi-media platform. This includes world-class publications, 6-9 print insertions throughout the year, year-long online presence, leveraging social media assets, a consumer event tie-in and celebrity endorsement.

The marketing platform will include flexible RTO-bundled consumer marketing offerings with various pricing, levels of consumer impressions and urban or soft outdoor experiential promotions. RTO partners will benefit from significant media cost savings, leveraging the Ontario, Canada brand and a suite of compelling value adds such as targeted email, bonus readership listings, iPhone and iPad editions.

OTMPC also plans to raise the awareness of and emotional connection to Ontario and explore new brand expressions that resonate in the U.S., Quebec and overseas. In emerging markets it will focus on awareness tactics. OTMPC will develop Ontario brand ambassadors by tapping into the new immigrant population with the goal of attracting their Visiting Friends and Relatives (VFR) and enabling them to share compelling content (photos, podcasts, video, etc.) through social media.

Ontario Tourism cannot outspend other destination competitors with global broadcast advertising campaigns so will shift greater resources to digital media and to the development of brand partners and will plan across paid, owned and earned media.

3.4 Current Marketing Efforts – Northern Ontario

3.4.1 OTMPC Northern Office

A dedicated staff team at OTMPC Northern Office works closely with OTMPC and partner tourism organizations in Northern Ontario to deliver a variety of marketing programs. The Office also works with the Northern Committee, a committee of OTMPC.

Branding

The previous strategy describes "the unique Northern Ontario Proposition". It says, "Our distinct difference, our sweet spot, will become how people react on an individual level to our diverse, inspiring and grand experiences. People will visit Northern Ontario to totally escape and discover their own souls again. They will be inspired here like nowhere else because there is more here: more outdoors, more ways to refresh and exhilarate, and a more welcoming environment, thanks to our diversity of offers and the warmth of our people. Emotional deployment/words/thoughts that express the idea further include: *Gasp. Scent. Sigh. Fresh. Refresh. Revive. Rest. Respite. Renew. Peace. Reach. Fly. Find. Forge. See. Soul. Clean. Green. Awe. Aspire. Breathe."*

This brand proposition manifests itself via the following:

- Per the recommendations of the previous strategy, OTMPC is currently using the "Canada's Great Outdoors" brand, particularly as a call to action in the U.S. This brand incorporates Northern Ontario as a destination as well as the outdoor experiences seen as "best bet" products for the region.
- OTMPC Northern Office also supports the outdoor product/activity brands that are the platform for its outdoor programs, such as Go Fish, Hunting in Ontario, Great Ontario Outdoor Adventure, and Go Ride. These brands can be characterized as pan-Ontario brands, rather than pan-Northern, as they do incorporate experiences available throughout the province.
- The destination brand of "Northern Ontario" is used in a limited fashion, mainly in conjunction with the Northern portal website which is explored in more detail below.

Programs

- Dedicated OTMPC programs are delivered with a targeted product focus in the categories of Canada's Great Outdoors (encompassing all products), Angling & Hunting, Outdoor Adventures (e.g. "soft outdoor" such as paddling, white water rafting, hiking), and Recreational Motorsports (incorporating snowmobiling, ATVing, motorcycling, and boating).

- The programs promote different types of activity within each (e.g. angling covers everything from ice fishing to fly-in fishing), while the Northern Ontario destination context for these activities is provided via online content and connections between different websites:
    - The outdoor programs connect to Northern Ontario destinations via the Northern Portal (covered below), which links to Northern Ontario tourism organization web sites (regions and cities).
    - The Angling & Hunting sites navigate to North Western, North Eastern and North Central areas with information on the experiences and operators they feature and links to tourism partners.
    - The Go Ride site connects to the destination context via trail information, a tour planner, destination based videos, and resources categorized by Northern Ontario region, all of which connect to tourism organization web sites by region.
    - The Ontario Outdoor site provides destination information by promoting "signature landscapes", and the majority are located in Northern Ontario, namely: Manitoulin Island, Algonquin Park and the Canadian Shield, Lake Superior Coast, Arctic Rivers and Boreal Forest, Killarney Park and La Cloche Mountain, Georgian Bay Shoreline, Lake Nipigon to Lake of the Woods, and Temagami and the Uplands of Ontario. It also provides information on the provincial parks located in Northern Ontario.
    - The Canada's Great Outdoors site navigates from the home page to regions and cities in Northern Ontario.
- Although these programs demonstrate promotion of Northern Ontario destinations, the media objectives of the OTMPC Northern Office programs are to showcase the province as the preferred vacation destination for a specific activity (pan-Ontario versus pan-Northern).
- The only program with a distinct Northern Ontario destination focus is OTMPC's "Ontario's North" program in conjunction with the cities which focuses on urban product. The marketing plan for this program was developed to continue promoting the tourism infrastructure of the five largest cities in Northern Ontario (Thunder Bay, Sault Ste. Marie, North Bay, Timmins and Sudbury) along with new partner attractions and communities that decided to join.

Marketing Tactics

- The "best bet markets" defined in the previous strategy have guided the market choices for experiential programs. Of note are the time-bound, integrated marketing campaigns in the U.S. for "Canada's Great Outdoors" in markets like Chicago and the identified best bet market of Minneapolis for angling. This has been in addition to marketing to more traditional markets including border States and the domestic market.

- OTMPC defines its market for its product programs as "avids". This is most apparent in the marketing programs for angling and hunting, which targets the "trophy outdoorsman"; the outdoor adventure and recreational motorsports programs appear to be broader based in their target. The outdoor adventure program, for example, incorporates a number of family images.

- Generally, the tactics incorporated into the programs incorporate dedicated websites, e-marketing, social media initiatives, contesting, consumer shows, media relations activities, advertising (television, print and radio) and industry partnerships.

- Per the recommendations in the previous strategy, OTMPC has attempted to better leverage consumer shows by focusing increasingly on "consumer touch" strategies. However, there are still a number of shows which OTMPC attends that are not necessarily by strategic choice but by political necessity.

- OTMPC is the driver of most of the media relations activities in Northern Ontario by initiating fam trips and media relationships with a relatively small budget allocation (in 2010/11 there were approximately 37 of these trips executed at a cost of just over $109,000.00). It often works with tourism organization partners to coordinate these fams, and usually relies on operators to provide product on a complimentary basis. It does not currently work closely with OTMPC's media relations group for this purpose. The majority of these fams are for motorsport and angling product. Operators and tourism organizations consistently mention the media fams as having concrete, positive impacts on visitation.

- OTMPC also pursues corporate partnerships and works with celebrity spokespeople as an ongoing marketing tactic. Examples include working with Babe Winkelman to promote fishing, online "celebrity fishing tips", media promotions with Chill magazine, and promotional relationships with companies such as Bass Pro retail stores.

- OTMPC is driving the majority of the social media marketing in Northern Ontario as well. Facets of this activity include the Northern Ontario Facebook page (connected to the Northern Portal, below), the "Ontario Outdoor" YouTube channel, and the provision of dynamic content such as blogs for the Northern Portal.

- OTMPC is also conducting e-marketing activities with e-mails, e-newsletters and e-updates going out to opt-ins to the Great Ontario Outdoor Adventure, Go Ride, Go Fish and Hunting in Ontario websites.

Northern Ontario Web Portal

One of the most significant tactics undertaken by the OTMPC Northern office to market Northern Ontario is the Northern Ontario Portal website, which was developed as part of the current five year strategy. The Northern Portal and the development of unique and compelling content is currently a critical strategy and consumer call to action, as follows:

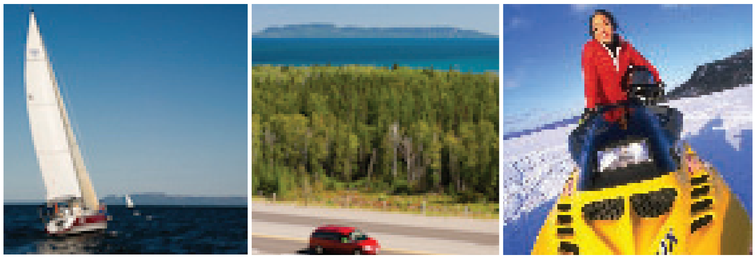
- The portal content focuses on pan-Ontario product experiences; regions; cities and sectors.
- The four core experiences mentioned above are prominently featured on the site.
- Partner organizations are the gateways to individual suppliers, regional destinations and others.
- Eleven partners currently provide content via fee for service agreements - including images, videos, blogs, stories, itineraries, bundles, maps, and offers that are refreshed regularly; however, these agreements will be terminated prior to the onset of this plan.

The site was designed with the following objectives in mind:

- Not designed as a navigable site, but as a "drive thru" – to immediately send the consumer to referral sites, which in theory will close the sale. It is designed as a lure site only, without a focus on fulfillment.
- The site is designed as a branding overlay and a link to social media. Content is therefore the key to the strategy behind the portal. Search engine optimization is prioritized in order to pull the majority of the traffic from the content on the site and third party endorsement.
- The lure function is achieved by generating buzz via consistently changing and updated content. Content on the site therefore needs to be relevant and newsworthy.

Annual costs for the portal are approximately:

- $210K per year to maintain ($50K to translate; $150K to TWG for maintenance/help desk/improvements; and $10K in admin).
- The total cost is estimated at $1.1 to 1.5M per year (including the costs to OTMPC for content creation that is outsourced as part of its fee for service agreements with partners, which will no longer continue).
- Content cost is estimated at approximately $600 per piece under current arrangements, which are slated to change with the likely elimination of the fee for service arrangements going forward.



Over the last three years the portal has built up significant traffic to an average of 130,000 to 145,000 unique visitors annually. User sessions now range from 500 to 1,000 per day. Return on investment of the portal cannot be legitimately analysed, as the site is not designed to create conversion. Currently there is little sense of how leads are translating into conversion with operators which is a reporting challenge.

Rather, the value of the site is its ability to refer site visitors and leads to partners, its ability to generate "buzz" by drawing significant numbers of visitors to a "drive thru" style portal, and its ability to provide an effective platform for social media tactics and third party endorsement:

- In terms of referring visitors to partners, most cities do not quantify referrals and are not tracking conversion. Sudbury, for example, received 142 referrals in 2010 from the Northern portal. "Secondary" cities generally feel they are getting no referrals from the Northern portal.
- The portal is the top referring site for one of the NORTAs, Algoma Country, which appears to correlate directly with its significant commitment to content creation and successful fulfillment of the MOU as it is intended. This resulted in just over 2,000 referrals over a two year period. Those NORTAs who have not seen these types of results may not be as focused on content creation, resulting in lower referral volume -- three NORTAs do not rank the portal in their Top Seven referral sites.
- The majority of NORTAs see more referrals from the other OTMPC sites, specifically the Canada's Great Outdoors, Go Fish and Go Ride sites which rank in the top 5 of referral sites for at least two NORTAs.

3.4.2 RTO

The RTO Transition Group was allocated $3.825M in 2010/11 to sub-regions for priority projects, which included cooperative efforts by multiple organizations coming together to leverage resources and develop synergies. Sub-regional plans are in progress/near completion for 2011/12, which is considered another transition year.

3.4.3 NORTAs

In terms of the role they play in marketing Northern Ontario, the NORTAs have been asked to align their marketing plans to fit within the "cascading model" established by the previous strategy. Current efforts in this regard include:

- NORTAs partner with the OTMPC Northern Office via fee for service agreements to deliver marketing activities for OTMPC programs, as follows:
    - Content creation for the Northern Portal (images, stories, bundles/ itineraries, testimonials, videos, packages and features).
    - Consumer show leads (pre show planning, development of show exhibits, staff scheduling and training, exhibit staffing and management, show reporting, data inputting).
    - Media fams (coordination and hosting).
    - OTMPC publication distribution (throughout their respective regions and travel centres, and outside the region via Algoma's Canada Store in Mackinaw, Michigan).
    - Sales function for OTMPC marketing opportunities (presenting these opportunities to members via e-mail blasts, follow up phone calls, and inclusion in newsletters).
- Some organizations are supporting the Canada's Great Outdoors brand by using it as part of their own marketing activities, while others are not; and similarly, some organizations are using the Northern portal as their call to action while others are not.

The NORTAs undertake their own marketing plans, focused mainly on leisure programs, emphasizing travel activities and "things to do". In terms of tactics, all NORTAs have an online presence, one notably with multiple, targeted micro sites. They are engaged in varying degrees in direct mail, e-marketing and social media (including YouTube channels, Flickr, Facebook and Twitter). Most NORTAs are involved in consumer shows (sports, fishing/hunting, snow mobiling) that are in addition to their program delivery for OTMPC. All create and distribute regional visitor guide publications, although this past year, some NORTAs cooperated to produce a guide on a sub-regional level. Outside of online, advertising is limited, as are media relations activities outside of the OTMPC fam program.

All of the NORTAs are membership-based organizations, and their marketing efforts reflect the strategic priorities of these members. Together, the NORTAs serve 1,052 members across Northern Ontario. The majority of the NORTAs have between 100 and 175 members, with the exception of one NORTA with 385 members (see EXHIBIT EIGHT). Two of the NORTAs, Rainbow Country and Ontario's Near North, have a significant number of members who are located in RTO 12.

Due to the membership composition of the NORTAs, their marketing is focused mainly on accommodators (such as hotels, lodges, and fly-in camps), attractions, and towns and municipalities within their region. Unlike other regions in Ontario, NORTAs do not have the advantage of representing "icon"-type tourism members who can bring significant marketing resources to contribute to NORTA marketing programs; rather, they mainly represent small enterprises.

3.4.4 The Five Cities

In terms of the role they play in marketing Northern Ontario, the cities have also been asked to align their marketing plans to fit within the "cascading model" established by the previous strategy. Current efforts in this regard include:

- The cities work with the OTMPC Northern Office via a partnership agreement to deliver marketing activities for the "Ontario's North" OTMPC program, developed to continue promoting the tourism infrastructure of the five largest cities in Northern Ontario (Thunder Bay, Sault Ste. Marie, North Bay, Timmins and Sudbury), along with new partner attractions and communities that decide to join, as follows:
    - Content creation for the Northern Portal (images, stories, bundles/itineraries, testimonials, videos, packages and features).
    - Attendance at motor coach and travel trade marketplaces.
    - Production and distribution of a group tour planner branded as "There's no place like this", and "Northern Ontario".
    - All-season city package campaigns for leisure marketing, distinctively developed for Sault Ste. Marie, Thunder Bay and the cities of the Northeast, including print and online media placements (with dollars leveraged from city budgets and additional partnerships).
    - A web site, www.ontariosnorth.com, featuring leisure, travel media, group tour, meetings and conventions, and sport.
    - Media relations activities (Ontario's North winter activities media fam, TMAC marketplace, hosting a TMAC event).
- Most cities are not using the Northern portal as a call to action although they are prominently featured on the site.
- Generally, the cities are not utilizing the Canada's Great Outdoors brand as a call to action or reference in their own marketing activities. This is perhaps not surprising given the outdoor/wilderness versus urban focus of the brand. One exception is Thunder Bay, which has launched the "Canada's Great Outdoors Begins in Canada's Great Outdoor City" campaign, weaving the outdoor theme into urban visitor experiences.

Each of the five cities executes its own marketing on behalf of the destination with staff dedicated to tourism; however, the extent of their marketing planning and execution varies widely. Thunder Bay, Sault Ste. Marie and Sudbury have integrated plans that incorporate tactics including print advertising and integrated marketing campaigns, extensive web sites and micro sites, social media, e-marketing, media relations, maps and guides, attendance at marketplaces and promotional partnerships; while Timmins currently has no marketing plan and North Bay has a very small budget for tourism marketing.

The cities' target markets are experientially based, incorporating the leisure experience, and in the case of Thunder Bay, Sudbury and Sault Ste. Marie specifically, actively targeting the group travel, sport tourism and meeting and convention markets (sport tourism and conferences have been identified as priorities by North Bay and Timmins as well).

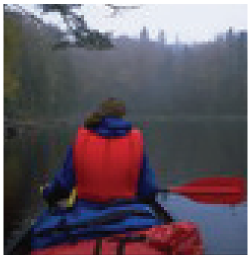
Successful strategies for marketing the cities include attraction packaging, capitalizing on proximity to the outdoors as a natural "gateway" to outdoor experiences, targeting Northern Ontario residents with the concept of "weekend getaways", leading with "best bet" icon attractions, corporate partnerships (e.g. airlines, retailers), participation in OTMPC marketing programs such as Family Fun and Great Drives, seasonally based campaigns (e.g. winter fun and March Break), and targeting the VFR market by making travel information accessible to local residents.

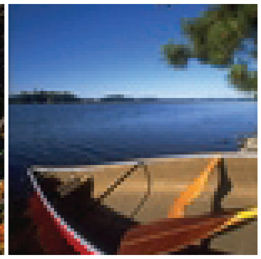
3.4.5 Operators

Despite their relatively small marketing budgets mentioned above, tourism operators in Northern Ontario are participating in a wide variety of marketing tactics, according to online survey respondents:

- Online tactics were the most common undertaking, with almost all operators maintaining a website. Print advertising is also executed by most operators (90%).
- Almost half are participating in consumer shows, media relations activities, broadcast media and social media activities.
- Despite the fact that word of mouth and repeat business were cited as the most important sources of business for tourism operators, only a third are actively engaging in e-marketing or database activities.
- 83% of tourism operators surveyed do not participate in pay to play marketing programs offered by tourism organizations.

In terms of the tactics that are seen as the most effective, website ranked the highest, followed by media coverage and paid media.





3.5 Current Tourism Product Landscape

The current tourism product landscape has not changed considerably since the previous strategy was developed. The strategy concluded: *"…the most significant gaps were the lack of competitively priced air package access for the short getaway vacation market, lack of city hotel business and leisure travel facilities, and aging infrastructure (roads, signage, rest stops, tourist information centres, park facilities, attractions and suppliers/operators). There were also discussions on the need to invest in and develop products such as spas, theatre, fine dining and other entertainment offers – as these are secondary drivers for "best bet" targets most likely to come to Northern Ontario for an outdoor experience."*

Recent key developments in terms of the tourism product in Northern Ontario include:

- Positive headway has been made in attracting air carriers to Northern Ontario; e.g. additional air service to Thunder Bay by Porter and Delta; air service to Sault Ste Marie by Porter. This results in easier access from the GTA with Porter flying out of the centrally located Toronto Island airport; along with price competition which is driving the price of air travel to the region down.

- Some attractions that were previously considered important tourism products have struggled and as a result are no longer focusing on tourism as the driver of their business model, namely the Shania Twain Centre in Timmins and the Polar Bear Habitat in Cochrane.

- The tourism operators that provide the backbone of the avid angling and hunting experience and who make up a significant proportion of membership in the NORTAs – the lodge and camp owners -- are struggling, and the aging infrastructure issue mentioned in the previous strategy is becoming more acute in this sector. More and more of these operations are closing on an annual basis as family businesses are not passed on and businesses are not purchased by a new operator.

- The lack of accommodation and facility infrastructure still limits the tourism marketing strategies of a number of the primary and secondary cities. Sault Ste. Marie, Sudbury, and Thunder Bay alone have the ability to host mid size groups for the purposes of meetings and conventions and sport tourism.

- Some limited product development has taken place, most notably in the areas of touring route development (Georgian Bay Coastal Route, motorcycle routes, rail trails), Great Lakes cruising, investment into attractions (Agawa Tour Train, Science North, Fort William Historical Park), and an increased incidence of product packaging via opportunities presented by the Northern portal and the marketing plans of the cities.

Further, a product development strategy was not developed out of the recommendations in the previous plan. Meanwhile, resources available for product development initiatives in Northern Ontario have remained limited to non-existent.

4.0 Key Issues to Address in the Updated Strategy

4.1 Industry Roles and Structure

There have been numerous and significant changes to the structure of the tourism industry in Northern Ontario as identified in the Situation Analysis above, and a number of key issues can be identified that must be considered in the updated strategy:

- Clarifying the role of RTO. Although its mandate has been set, how it will specifically direct/support an overall strategy in co-operation with the sub-regions needs to be defined.
- OTMPC's role. How does OTMPC's current role of the lead for marketing in Northern Ontario develop to allow the sub-regions to take on a larger role under a larger RTO strategy? How does its role change as it moves away from a partnership model?
- NORTA roles. What is the role for membership-based organizations in RTO activities, within the new context of sub-regional RTOs? How will their own marketing activities align with or enhance RTO and OTMPC marketing activities?
- Ability of partners to work together. Difficulties in implementing the recommendations from the previous marketing strategy were often due to a lack of ability of various tourism marketing organizations to work together and partner.
- Sustainability. A number of NORTAs are financially vulnerable, limited in their activities and serving very few members. This will be magnified by the elimination of OTMPC's partnership agreements. Strong regional organizations need more sustainable funding to operate effectively and the future of some organizations is an unknown.
- Various tourism interests. How does the new structure ensure an all-encompassing representation of tourism interests in each area? How does it ensure that cities and regional groups are working together to leverage the urban/rural product and market mix?
- The operator and the consumer. Let's not forget the operators and visitor servicing tasks, and how they will fit into the overall strategy. Operators are crucial to "closing the sale". Visitors need to be properly serviced when in-market in order to return and generate positive word-of-mouth.

4.2 Ability of the Industry to Impact Visitation via Marketing

From the visitor statistics reviewed above, it can be concluded that fewer than a third of all tourist visits captured by statistics fall into the category of tourist visits that can likely be impacted by tourism marketing activities undertaken to promote visitation to Northern Ontario -- if these activities are defined as those which would predominantly target leisure visitors who stay overnight in roofed accommodation and reside outside of the region itself:

- Of the total 6.9M tourist visits to Northern Ontario, only 4.14M are overnight trips, and of these, only 2.73M, or 40%, are overnight tourist visits from those who do not reside in Northern Ontario.
- At the same time, only 2.5M of all overnight tourist visits, or 36%, are for pleasure. Of the 2.73M overnight visits from residents who reside outside of Northern Ontario, a significant proportion will therefore be non-pleasure trips – but this exact number cannot be extrapolated from the statistics available.
- The industry as a whole is not marketing the lodging type that is most commonly used by visitors – private cottages, which account for 61% of all person nights. Consequently, Northern Ontario tourism marketing efforts at a maximum address only 5.7M of 16.1M total person nights.

4.3 Image of Northern Ontario and Lack of Familiarity and Interest as a Destination

According to the most recent (2011) Travel Intentions Survey, summarized above, Northern Ontario has made little headway over the past year (2010-2011) to advance its position as a tourism destination among the travelling public on either side of the border:

- Interest has stagnated, with no increase in interest or intention to travel amongst either Americans or Canadians.
- There is no evidence of image improvement; and if anything, Northern Ontario is viewed more stereotypically as a rather remote location generally associated with nature, fishing, hunting, hiking and camping.
- The North's main issue tracks to lack of familiarity and poor appreciation of its differentiating features. As a consequence, it appeals most strongly to the rest of the province (where familiarity is greatest) and has very limited appeal in Quebec (where travellers, perhaps, have difficulty appreciating the difference from their own North).
- If the objective is to raise the Northern Ontario region's tourism profile and breadth of appeal in a general sense, much remains to be done to stimulate appreciation of a fuller offer beyond basic perceptions of pristine nature and the outdoors.

Northern Ontario has the additional challenge of a lack of familiarity with its geography and the actual boundaries of the tourism region known as "Northern Ontario". Anecdotal information provided by tourism organizations and operators indicates that the domestic market has a very low awareness of the destinations within the region (including landmarks, lakes and rivers; natural wonders; regions; secondary cities; towns and provincial and national parks) and most concur that there is a consumer impression that Northern Ontario "starts and ends with Muskoka", which is not within the boundaries of RTO 13. Indeed, travelling "up north" for Southern Ontario residents commonly indicates a trip to the "cottage country" of Muskoka, Georgian Bay, or Haliburton. Non-domestic markets may have a familiarity with the portion of the region located closest to them, but likely not of its larger geography.

4.4 Lack of Awareness of Things to See and Do in Northern Ontario

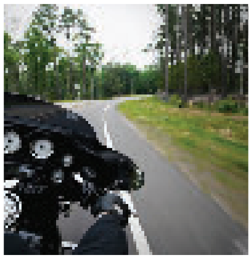
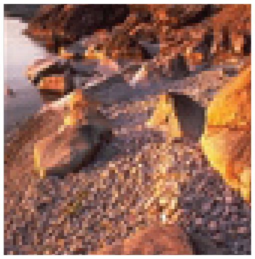
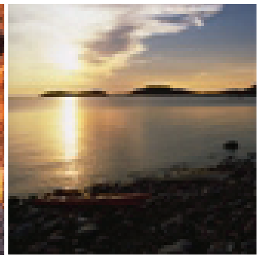
According to the most recent *Travel Intentions Survey,* summarized above, Northern Ontario also has a significant challenge ahead to inform prospective visitors about activities available in the region:

- Despite the marketing resources that all levels of tourism marketers in the region are expending on communicating the availability and benefits of pursuing recreational motorsports, angling and hunting and outdoor adventure activities in Northern Ontario, only a third of Canadians and even fewer Americans had an unprompted awareness of any of these products.
- "Don't know" is the go to response for consumers from both sides of the border when asked about awareness of things to do or their reasons for being very interested in Northern Ontario ("don't know" was cited by 56% of Americans aware of Ontario and 29% of Americans who were very interested in visiting the region in the next two years).
- The products rank very low amongst consumers when they define experiences that are unique or different in Northern Ontario.

4.5 Drop in Visitation and U.S. Market Volatility

According to the most recent Travel Intentions Survey, summarized above, significant tourism resources are being spent in U.S. markets on a provincial level, but despite this, tourism volumes from the U.S. are relatively low. In fact, U.S. visitation has been declining in Northern Ontario since 2002, mainly due to economic factors.

Many of the "best bet" markets identified in the previous strategy were U.S. markets, and tourism organizations in all three sub-regions continue to expend significant resources on these American markets, with most of the cities and regional tourism organizations listing U.S. markets as part of their primary target markets.

With the economic recovery predicted to be slow, and even predictions that travel from these markets will never recover to previous levels, Northern Ontario needs to closely consider its traditional reliance on these markets to determine what level of resources should be dedicated to them in the future.

4.6 Effectiveness of Marketing Efforts

The market research summarized above illustrates that in some instances there is a gap between the focus of current marketing efforts in Northern Ontario and the origin or purpose of tourist visits; the activities visitors engage in while here; or the activities consumers are interested in when considering Northern Ontario as a travel destination.

The Quebec market, the Chicago market, the family market, and the hunting market are all important parts of Northern Ontario marketing strategies and tactics, yet do not appear to result in significant numbers of visits or interest (note that the low visitation levels for hunting still have significant impact given that they are high yield visitors).

There is also a gap between the resources allocated to marketing tactics and their relative effectiveness. Consumer shows remain a popular marketing tactic across Northern Ontario, although they were chosen as a top three source of business leads by only 13% of tourism operators surveyed. It is also notable that only 4% of tourism operator respondents chose tourism organization pay to play marketing programs as a top three source. Most tourism organizations are minimally offering pay to play opportunities via their publications such as visitor guides, so this may indicate that these publications are having little impact on lead generation.

4.7 Marketing Gaps

There are a number of gap areas in terms of the markets, products and tactics that are used to market tourism in Northern Ontario.

4.7.1 Products and Markets

- Private cottage accommodation, trip motivator attractions (Agawa Tour Train, Science North), inter and intra regional travel, day trips, VFR, the domestic market, business travel, touring(specifically driving routes and RV travel) and camping all appear to drive significant numbers of visits or interest in Northern Ontario even though only a single organization may market them or there is minimal or no marketing effort put behind them. It should be noted that some of these products and markets are considered low yield.
- Many high opportunity products (e.g. RV touring, cycling, boating, coastal routes, fly fishing, Great Lakes cruising), have limited marketing resources dedicated to them. There appears to be minimal marketing dollars allocated to leveraging new and emerging products.

- Most of the initiatives of the OTMPC's provincial "there's no place like this" campaign incorporate few images of Northern Ontario destinations or products. For example, in Winnipeg the campaign has included only a single Northern Ontario image of the MS Kenora, despite the fact that this is a primary market for Northwestern Ontario.
- The carefully targeted strategy of the OTMPC Northern office effectively emphasizes avid outdoor product and aligns very closely with the membership make-up of certain NORTAs -- Sunset Country and Ontario's Wilderness Region (operators who provide avid hunting and fishing or outdoor wilderness experiences) and a good portion of the membership of Algoma Country, for example. This targeted strategy does mean, however, that many of the products or product aspects prioritized by the regions or cities or potential sub-regional trip motivators are not part of the program strategy and therefore are not marketed at a pan-Northern level. For example:
    - Although the North of Superior Tourism Association, Rainbow Country, Ontario's Near North and Algoma Country touring product aligns well with the recreational motorsports focus on motorcycling and snowmobiling, other types of touring such as driving, cycling or RVing are not emphasized.
    - Natural resources in some areas are better suited to recreational versus avid fishing, such as the product found in Rainbow Country, which does not fit as well with the angling program.
    - Attractions, cultural sites, aboriginal product and destinations (towns, routes, lakes and rivers) do not directly connect with the key messages and branding of the product programs at OTMPC; they are promoted by the cities and NORTAs and therefore do not appear prominently in pan-Northern marketing initiatives.
    - Natural wonders and provincial and national parks do have a presence as part of the outdoor adventure program but the key messages of this program are more focused on experiences than on the location for these experiences.
    - OTMPC's focus on marketing pan-Ontario outdoor product prioritizes the product message rather than the Northern Ontario destination. This is a suitable and effective strategy given OTMPC's mandate, but does leave a gap in terms of creating awareness for Northern Ontario.
- A relatively small proportion of tourism operators in Northern Ontario are members of tourism organizations. Quite a number appear to be disenfranchised from the larger industry, limiting their access to marketing opportunities.

4.7.2 Tactics

- The current Northern portal site, in conjunction with the OTMPC Northern Office's product sites and the regional and city sites, do not fully address all of the marketing needs for tourism marketing in Northern Ontario, with significant gaps in some key areas:
  - The Northern portal concept assumes that referral sites can effectively close the sale. In most cases, there are far too many steps involved in the visitor moving from the portal site to a call to action to book.
  - There are minimal sites that provide online booking capabilities for consumers. In terms of tourism organizations, only Tourism Sault Ste Marie offers booking capabilities on its site, and very few operators offer this. Generally, it is not "easy to buy" the Northern Ontario experience online; and it is also difficult to "window shop" Northern Ontario experiences online to compare travel options, pricing and amenities.
  - The destination sites that OTMPC refers visitors to via its own sites are of varying quality and calibre in terms of the site experience. Visitors will often be directed from the high quality functionality and design of the OTMPC sites to sites that, with notable exceptions (e.g. Tourism Sault Ste. Marie, Algoma Country and Tourism Thunder Bay), do not "fulfill the brand promise" OTMPC has developed.
  - In most cases, only tourism operators who are paying members of the various tourism organizations are served by the current online strategy.
  - A number of product areas that are relevant to the consumer are currently under-served in terms of an online presence because they are understandably not a priority for member-based organizations or OTMPC. These include private cottage accommodation; products that cross over regional or destination boundaries; and "low yield" visitor experiences.
  - Many destinations and places that would be relevant to the traveller are under-represented as part of the current pan-Northern online presence, which focuses on the cities and existing regions as defined by tourism organizations. These include secondary cities such as Kenora that may be smaller in size but do have a significant tourism orientation, and destinations that might only be found via an assumed knowledge of which region they are located in (such as touring routes; landmarks, lakes and rivers; and national and provincial parks).

- The overall interactive strategy for Northern Ontario appears to be lacking as a source of leads for tourism operators. Although their own websites are an important source of business, the tourism operator survey indicates that currently, commissionable bookings, e-marketing and website referrals appear to be having minimal impact on leads for operators. This is perhaps not surprising given that very few of the regions and only some of the cities are effectively leveraging e-marketing opportunities via e-newsletters or e-blast programs or focusing on database driven strategies, and given the few online reservation systems available to operators.

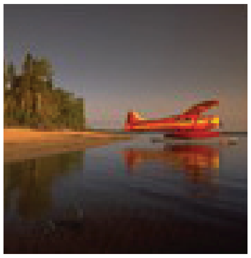
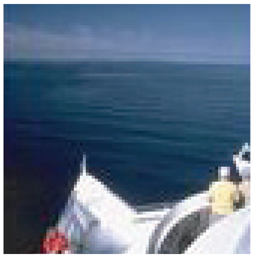
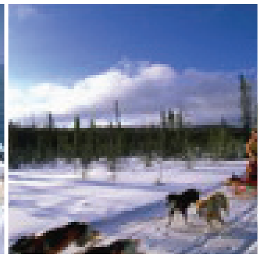
- Although media relations activities are executed and initiated by the OTMPC Northern Office in conjunction with its partners and by some cities, media fam activity and ongoing outreach to the travel media and online travel influencers is not a primary tactical focus in Northern Ontario.

- Although most tourism organizations are engaged in social media in some manner, the effective execution of these tactics is inconsistent and in some cases lacking:

    - OTMPC, via Canada's Great Outdoors and Northern Ontario Travel, has fewer than 300 Facebook likes combined. Canada's Great Outdoors has no recent posts and cannot be found on Twitter. There are very regular posts to the Northern Ontario Travel Facebook page, a significant effort for only 83 people who like this page. Go Fish and Go Ride have effective video channels but are otherwise limited in their social media initiatives.

    - The NORTAs all have Facebook pages, but with the exception of one, have 26 to 180 likes. Some are very active with regular posts and good interaction, but most have audience sizes that indicate they are only "talking to themselves". The exception is Ontario's Sunset Country, which has 1,862 likes, active posting, and decent user interaction. Fewer NORTAs are on Twitter, and those with followers are infrequent Tweeters.

    - Some of the cities have had more success with social media. The Ontario's North page now has 4,470 likes resulting from the page acting as the call to action for the recent RTO13A awareness campaign, and it features very regular posts. Two notable Facebook successes are Tourism Sault Ste. Marie and Kenora -- Sault Ste Marie has 20,000 likes but do not post much on their own wall or control content; while Kenora has a very well done page with active posters. Some of the cities are set up on Facebook as personal profiles or as a group rather than as a page. Active Tweeters include Sudbury and Thunder Bay. Timmins and North Bay engage in no to minimal social media activity.

4.8 Branding Northern Ontario

Many of OTMPC's programs feature brands that are pan-Ontario rather than pan-Northern in orientation (Go Fish, Go Ride, The Great Ontario Outdoor Adventure, etc.). Pan-Northern brands include "Canada's Great Outdoors", "Northern Ontario and Northern Ontario Travel" and "Ontario's North". The most widely used pan-Northern brand is "Canada's Great Outdoors", which is designed to resonate specifically with the American market:

It could be argued that "Canada's Great Outdoors" cannot be effectively used domestically as many Ontarians would see the brand promise of Canada's Great Outdoors as more befitting of iconic locations located elsewhere (e.g. the Rocky Mountains). It is likely that these multiple pan-Northern brands, that have similar nomenclature, are confusing to the consumer.

Other branding issues in Northern Ontario include the multitude of brands used to promote tourism in Northern Ontario at the regional, city, town and municipal level. Although these brands do not necessarily duplicate, given that they are marketing specific destinations and are generally used to market cohesive markets and products, it can be said that most of these brands have relatively low consumer awareness and would need significant resources to be marketed effectively. In addition, very few tourism organizations are effectively using the OTMPC brand tool kit, so the extent of the "branding cascade" throughout the Region is limited.

4.9 Northern Ontario Web Portal Implementation Challenges

Despite the OTMPC Northern Office's provision of ongoing training, comprehensive resources such as toolkits, and fee for service agreements, there a number of key issues around the ongoing implementation tasks and management of the portal in partnership with various tourism organizations:

- The site concept is dependent on the tourism partners who provide content – under fee for service agreements – effectively providing this service. Experience has revealed that less than half of content contributors are dedicated to and have the resources to effectively fulfill the content development component of the site. Some content providers participate in the site solely because they are getting paid, and the result is some ineffective content providers who are not fully engaged in making the portal a success or leveraging the opportunities it might provide to their organization.
- Although the execution of the content is improving, the overall quality of the content varies widely. Content is often completed overnight in order to meet a deadline; many contributing organizations are using co-op students and summer students to create content; and in some cases the content is duplicate web site copy or are event postings rather than true "articles".

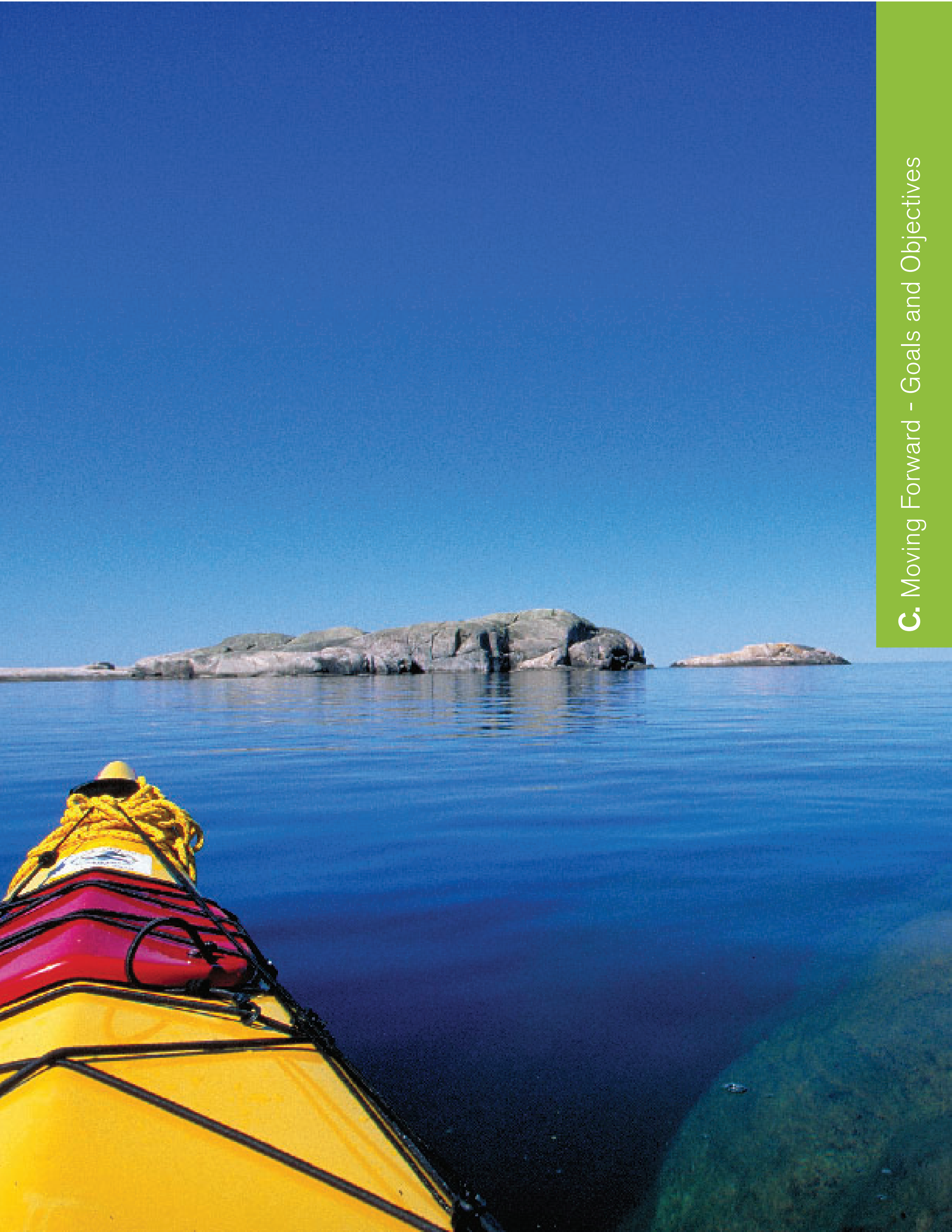
- There is a lot of overlap and repetition; the content on the site has been characterized as a classic case of "quantity versus quality", with content "overkill". Operators have pointed to this as well saying that their businesses get lost in pages and pages of products.
- The content is also disjointed; it is not thematically well structured and in some ways it could be viewed like a magazine with many different columns but no editor/publisher who determines whether the content fits the vision. The articles/"content" are not necessarily what consumers are seeking – they are what the contributors consider relevant (or in some cases, 'easy').
- Because of these content issues, it is also questionable as to whether the site accurately reflects the range of destinations and product in Northern Ontario.
- Some days there are Southern Ontario stories on the portal, so that the site does not currently reflect a true "pan Northern" marketing initiative.
- Not all partners are using the portal as a call to action in their marketing activities, which impacts the traffic to the site.

4.10 Product Development, Training and Skills

A key recommendation in the previous plan was the need for a product development strategy for Northern Ontario, to support the successful implementation of the marketing strategy, although this was not completed.

Through the marketing planning process, numerous product development needs were identified and many are captured in the SWOT Analysis above and the results of the online operator survey. One of the most common issues mentioned by operators was the lack of access to capital – almost 30% of those surveyed have not made significant capital investments in their operation in the last five years and over half have no short term plans to do so. The importance of product development is recognized by operators, with over 60% saying that they will be adding new products to their offering in the short term, and many identifying new or emerging products as the key tourism opportunity for the future.

Stakeholders also mentioned the need to improve training and skills development in strategic areas such as e-technology, marketing, business planning and customer service to better serve travelers. The operator survey indicated significant interest in such training opportunities and respondents identified access to skilled staff as a major issue.



C. Moving Forward - Goals and Objectives

C. Moving Forward – Goals and Objectives

The plan is designed to maximize the Northern Ontario Region's potential to successfully attract visitors and grow spending; to meet the need to achieve a long-term competitive and sustainable tourism industry in the region; and to achieve the goals and objectives of *Discovering Ontario, a report on the future of tourism.*

In order to align with the goals outlined in the report, Northern Ontario's overarching marketing goal is to double tourism receipts by 2020. This is a lofty target, particularly in a changing and challenging marketplace and in a time of significant transition in the structure of the tourism industry.

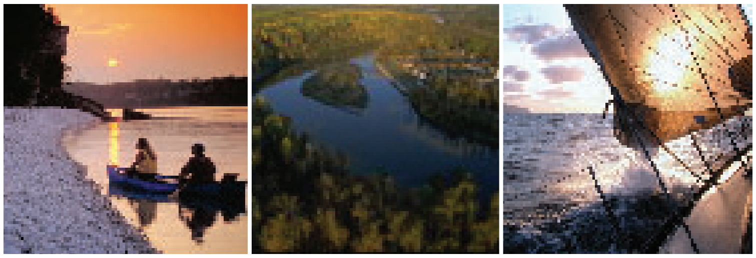
In order to meet this lofty target, it needs to be broken down further to focus on the areas of tourism visitation that Northern Ontario tourism marketing can realistically impact. Rather than framing goals in terms of increasing "overnight stays" or "visitor spending", Northern Ontario should focus on goals as follows:

- Increase the percentage of visitation that stays in non-private roofed accommodation. In other words, focus on "heads in beds".
- Increase the percentage of visitation from outside of the region.
- Increase the percentage of visitation for the purposes of pleasure trips.

Unfortunately, tracking progress on these goals is difficult, since visitor statistics for a given year do not become available until almost three years after Statistics Canada sources data. The first data on visitation for 2012, for example, will not be available until 2015, three years into the plan.

Increases can be achieved by addressing a changing and challenging marketplace and effectively managing and directing the efforts of all stakeholders in the Northern Ontario Tourism Industry for maximum effectiveness with the following objectives:

- Drive more business from key markets and 'best bet' areas of opportunity.
- Design and deliver marketing programs that not only align, coordinate, and cascade without duplication, but also enhance and augment each other.
- Develop tactics and messaging for all marketing programs based on target markets and visitor demographics.
- Per the Sorbara report, OTMPC can focus on the unique product offerings of the region (including natural experiences and great water assets) as well as niche tourism experiences; while the RTO can identify high-potential unique tourism product and develop regional strategies to coordinate programming around centerpiece attractions; package regional tourism experiences and services for tourists; and prioritize niche product opportunities with the highest potential to attract tourists for future development. The Region can work toward creating a unique brand and a stellar experience within the provincial brand.



- Per the Sorbara report, marketing tactics would prioritize e-marketing, internet marketing and online booking capabilities. The Region would develop a regional online strategy within the provincial one, which helps consumers explore the regions and book online.
- While focusing on “best bets” at the OTMPC and Regional levels, allow for the individual strengths and attractions of destinations within Northern Ontario to be reflected in the overall marketing program.

D. Marketing Strategy

D. Marketing Strategy

1.0 Best Bet Market Opportunities

Northern Ontario should focus and concentrate its resources against the target audiences and markets which offer the best opportunity and the highest return on investment. These markets can be managed and targeted by the OTMPC Northern Office, RTO 13 and the sub-regions of 13A, 13B and 13C, with various contributions by other tourism organizations. Recommended roles and responsibilities are detailed below in Section 4.2.

A new perspective on best bet markets is required given the previous strategy's two region versus three region approach, the volatility of the U.S. market (the source of many of the current "best bet" markets), and the gap identified above between marketing efforts and actual visitation.

It should be noted that very limited market research was available in the development of these recommendations for best bet market opportunities. New travel motivations research (TAMS) and new consumer segmentation research (Environics, Decima) have not been undertaken since the previous strategy, almost five years ago. The Statistics Canada visitation numbers referenced were almost three years old. The recommendations are therefore heavily based on the only recent research available – on travel intentions, summarized above, and on tourism operator responses to questions about their top three markets in terms of volume and yield.

The guiding principles behind the best bet market opportunity recommendations are:

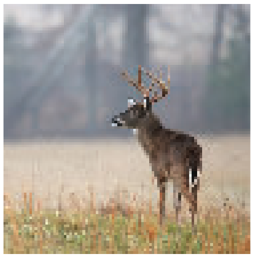
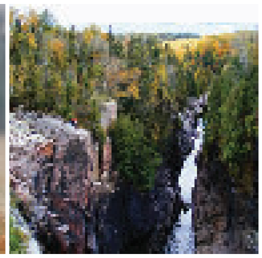
- Less reliance on consumer segmentation.
  Northern Ontario can look less to consumer segmentation (e.g. Environics research) per the previous strategy for the source of best bet markets, and except in the case of touring and some soft outdoor product, rely more closely on simply defined activity based and geographic based markets.

- Better penetration of existing markets.
  Given current levels of visitation, none of Northern Ontario's current markets could be considered mature, which provides significant opportunity.

- At the same time, pursue new opportunities and emerging markets.
  Given the cost to pursue these markets, this of course will be largely based on available resources.

- A balance between U.S. and non-American markets.
  The North's past reliance on the U.S. market is a risky strategy moving forward given the slow economic recovery.

- Move away from previously defined "best bet" markets that do not appear to be working.
  Results from Quebec, the Northeastern U.S., Chicago and the family market do not indicate that Northern Ontario resonates as a high interest tourism destination with these groups.

- Consider "close to home".
  Current visitor information and highest yield market reports from operators indicate the importance of Southern Ontario and the region itself as a market for Northern Ontario.

1.1 For Northern Ontario

- It is recommended that OTMPC Northern Office focus on "best bet", activity-based markets using Northern Ontario product as the trip motivator, in the geographic areas defined further below:
  - Hunting and fishing (focus on avids, but with increased attention to the recreational angler/hunter, adult groups, males)
  - Broad outdoor (avid and recreational, adult males and couples)
  - Recreational motorsports (avid and recreational, adult males and couples)
- It is recommended that OTMPC Northern Office focus on "best bet" new markets because of its significant market resources, its experience in entering new markets for the benefit of Northern Ontario, and its potential to leverage the presence of the larger provincial brand in some markets. Although "new" markets often bring to mind emerging or distant markets, for Northern Ontario these can be defined as any market that Northern Ontario has not prioritized or actively targeted in the past. These include:
  - Domestic markets: GTA, London, Hamilton and Central Ontario (e.g. Barrie); new Canadians who reside in Southern Ontario (encouraging both avid and recreational participation in activities, particularly recreational motorsports and soft outdoor).
  - European markets: recent activities indicate Italy may present an opportunity for hunting; all product programs can look to Europe, including France, Germany and Holland (all cited in tourism operator surveys). Choice of specific European markets can be further based on activities of OTMPC and further research required.
- Given the disappointing return on recent investments in new U.S. markets, OTMPC is encouraged to focus on existing markets while the volatility in the market continues and until such time that further secondary market research can more accurately pinpoint areas of focus. In terms of existing markets, it can continue to focus where its "Canada's Great Outdoors" brand can resonate, and where "high yield lives" for avid fishing and hunting product, namely Minneapolis-St. Paul, Milwaukee and Michigan.

1.2 For RTO Sub-regions

- It is recommended that RTO sub-regions focus on "best bet" activity-based markets using Northern Ontario product as the trip motivator, in the geographic areas defined further below:
    - Hunting and fishing (balancing avids and recreational as appropriate, adult groups, males)
    - Broad outdoor (avid and recreational, adult males and couples)
    - Recreational motorsports (avid and recreational, adult males and couples)
    - Touring (including recreational motorsports but also emphasizing scenic drives, RVs and cruising)
    - Sport tourism
    - Meeting and corporate travel
    - VFR
- The sub-regions of the RTO can target "best bet" geographic markets for pan-Northern marketing activities, defined as a manageable number of existing Northern Ontario markets that provide an opportunity for further market penetration, namely:
    - Manitoba, Southern Ontario and the border states of Michigan, Ohio, Minnesota and Wisconsin.
    - Inter-regional markets: urban centres within the region itself, e.g. Sudbury, Thunder Bay
- The sub-regions can also look at marketing in OTMPC's "new" markets once they have been entered and tested, and some inroads have been made. Quick entry into the GTA is recommended in order to balance the emphasis between U.S. and domestic markets; to share resources between OTMPC and the RTO in this very expensive marketing context; and to leverage the opportunities of new air connections and lower cost air travel.

2.0 Tactical Strategies

The following are the recommended priority tactical strategies to drive tourism marketing in Northern Ontario. These tactics would be managed and/or executed by the OTMPC Northern Office, RTO 13 and the sub-regions of 13A, 13B and 13C, with various contributions by other tourism organizations. Recommended roles and responsibilities are detailed below in Section 4.2.

2.1 Brand Application

2.1.1 Pan-Ontario Products

It is recommended that OTMPC's branding activities around pan-Ontario product experiences with a Northern Ontario emphasis continue (Go Fish, Go Ride, etc.). These brands work well with their niche targeting strategy that focuses attention specifically on those interest groups closely aligned with the core offer and the activities associated with it (fishing, hunting, canoeing/kayaking, etc.). Similarly, Canada's Great Outdoors, as an umbrella brand for the outdoor products for marketing activities in the U.S. has shown good traction and consumer resonance.

It is also recommended that the OTMPC Northern Office continues to work with OTMPC to ensure that Northern Ontario products and destinations are featured as part of provincial branding activities, such as the "There's No Place Like This" campaign; and that Northern Ontario "leads" all promotion of outdoor product.

2.1.2 Pan-Northern Branding

Because OTMPC's focus is on pan-Ontario product brands and a U.S.-focused destination/product brand, there is a gap in terms of a pan-Northern brand that would resonate with all geographic markets and encompass both Northern Ontario's destinations and experiences.

Although the advent of the RTO structure may appear to dictate the need to fill this gap, in reality, the wisdom and practicality of creating such a pan-Northern brand is questionable for two main reasons:

- Any Northern Ontario brand is not likely to become a recognized tourism destination or trip motivator -- rather its products, best bet destinations (regions, cities, towns), signature landscapes, natural wonders such as lakes and rivers, and touring routes will.
- The broad geographic expanse and lack of cohesiveness of the product and geographic markets within Northern Ontario do not lend themselves to the development of an umbrella destination brand at the pan-Northern level.

It is therefore recommended that:

- Some type of overarching regional brand reference (currently "Northern Ontario" and "Northern Ontario Travel") continues to be used, but only in its current limited fashion (e.g. Northern Ontario web portal). This would be used by RTO13 when engaging in its minimal pan-Northern marketing and branding, solely to position Northern Ontario geographically in the consumer's mind and to create awareness for "best bet" destinations, routes, and signature landscapes across the north. It can focus on a sense of place, through promotion of three pillars: people, product and environment.
- This effort should be supported not by the current reference to "Northern Ontario" (which could be misconstrued as Muskoka), but with a name reference that removes geographic confusion. An example would be "Ontario's True North", a place that is far away and unfamiliar to most in its own domestic market, yet home to icon experiences and locations that many recognize and identify with. This brand would be used by RTO 13 in limited tactics – such as in the context of a pan-Northern online presence used as a common call to action by various tourism stakeholders, or for a pan-Northern lure publication.
- That "Ontario's North" is no longer used as a distinct brand to bring together the five cities. Like the sub-regions and regional organizations, the cities can align with and adopt "Canada's Great Outdoors" or "Ontario's True North" as appropriate. One less Northern Ontario brand in market will reduce consumer confusion.

2.1.3 RTO Sub-Regional Branding

Conclusions from the latest travel intentions survey with regard to increasing Northern Ontario's tourism profile and broadening its appeal suggested a strategy of conveying information that underscores Northern Ontario's distinctiveness in specific terms. An activity such as motorcycling, angling or paddling is different when experienced in the true wilderness; and an attraction such as the Agawa Tour Train or Science North is available nowhere else but in the "true north". The sub-regions will connect the place and the product in all tactics, to highlight the uniqueness of Northern Ontario's experiences.

Although the current industry structure dictates that marketing activities will be undertaken at a sub-regional level, this does not in turn dictate that the sub-regions need to brand themselves as distinct destinations. The sub-regions are encouraged to avoid branding themselves in this manner, and rather focus on building awareness of their best bet destinations (regions, cities, towns), signature landscapes, natural wonders such as lakes and rivers, and touring routes to support both pan-Northern place-based branding and pan-Ontario experiential product-based branding.

If required, the sub-regions can consider using a brand extension of "Ontario's True North" to connect to this common call to action for their RTO sub-regional marketing activities. This brand extension would further define the sub-region by the simple addition of a select few of its most recognizable, "best bet" tourism destinations and landscapes. Examples could include:

- 13A: Ontario's True North – Manitoulin/Sudbury/James Bay
- 13B: Ontario's True North – Algoma/Sault Ste. Marie/Agawa Canyon
- 13C: Ontario's True North – Superior Coast/Thunder Bay/Sunset

Again, this would be utilized in a limited fashion. Examples would include a URL directing consumers to a sub-regional specific web page on a pan-Northern site and a means to geographically separate content in a pan-Northern lure publication.

2.2 Emphasize and Leverage Media Relations Tactics

An aggressive travel media program can play an integral role in maximizing consumer awareness of Northern Ontario through unpaid media coverage in key markets from freelance journalists and bloggers, travel editors, broadcasters, producers, and travel trade media. Given the marketing gap identified above, it is recommended that there is an increased emphasis on media relations tactics:

- Fam tours are consistently cited by stakeholders as providing immediate impact on "heads in beds".
- Media relations tactics are a tangible way to directly connect OTMPC's product/experience marketing efforts to tourism operators in the region.
- Generally these tactics are easily measurable.
- Media relations can be leveraged for use in other tactical strategies. Editorial content can be part of both social media and online strategies, allowing Northern Ontario to capitalize on the trend toward third party endorsement.

This can be implemented as follows:

2.2.1 Editorial

- Pitch unique story ideas to media to encourage story placement and to initiate and plan media tours to Northern Ontario for qualified journalists.
- Media needs to be kept constantly informed of what's new in tourism in Northern Ontario with updates and media releases on new travel products events, personalities, and regional descriptions for unique travel story opportunities.
- Articles on new tourism products and attractions should also be submitted for CTC, OTMPC and various media association newsletters.

2.2.2 Media Tours and Press Trips (Fams)

- By increasing the resources dedicated to media tours with writers experiencing Northern Ontario first-hand, a larger quantity of press trips can be executed on an annual basis.
- Recent fams have focused on snowmobiling, motorcycling, angling and the urban experience; there should be a concerted effort to broaden the media focus to incorporate the full range of Northern Ontario product.
- Costs can be shared by operators via the provision of media rates for tourism product, versus in-kind contributions.
- Given the number of inquiries they receive and their efforts on behalf of other Ontario regions, OTMPC corporate can be encouraged to provide leads for press trips.

2.2.3 Sales Activities

- Media receptions, promotions, and sales calls in key geographic markets are crucial elements in a travel media program.
- These activities can be done in partnership with OTMPC corporate as appropriate.

2.2.4 Media Marketplaces

- Media marketplaces have been utilized to a limited extent in the past. Northern Ontario should consider an increased presence.
- The Canadian Tourism Commission Canada Media Marketplace, held annually in New York City, offers meetings with primarily American travel media in one-to-one pre-scheduled appointments.
- The Canadian Tourism Commission GoMedia Canada Marketplace offers meetings with accredited Canadian travel media in one-to-one pre-scheduled appointments.

2.2.5 Tourism "Open Mic" Program

- Adopting a best practice from Newfoundland and Labrador Tourism, those managing the Northern Ontario media relations program can keep informed of tourism product offerings via teleconference presentations to staff who are in contact with consumers, travel trade professionals, and travel media.
- In order to help staff supply them with current information on new products and story ideas, tourism operators and tourism organizations participate on a monthly basis in a presentation to staff via prior reservation. This standing appointment keeps the need for media relations-friendly content top of mind amongst tourism stakeholders.

2.3 Emphasize and Leverage Corporate Partnerships and Paid Spokespeople

OTMPC Northern Office has a track record of developing corporate sponsorships and using paid spokespeople. Although success has been mixed in some cases, the majority of these efforts have effectively created "buzz" about Northern Ontario product and allowed OTMPC to reach its target consumer in innovative ways such as via "consumer touch" at retail stores and radio commercials featuring Babe Winkleman; or in unexpected places, such as the beer stores via *Chill* magazine.

It is recommended that a greater allocation of resources is dedicated to the pursuit of such partnerships, with the goal of developing one corporate sponsorship and one paid spokesperson for each OTMPC product program.

2.4 A Reconsideration of the Pan-Northern Online Presence

The potential for the new RTO to take on some pan-Northern marketing responsibility while the OTMPC Northern Office focuses on pan-Ontario experiential product, and a desire amongst the tourism community to look closely at the capabilities of the current Northern portal, leads to a reconsideration of the pan-Northern online presence.

2.4.1 Key Drivers of the Online Presence

The Northern portal, the current cornerstone of the Northern Ontario web presence, has previously been assessed in terms of the key role it played in the effective use of fee for service agreements, in search engine optimization, and in referring visitors to partner sites.

With the assumption going forward that these fee for service contracts will likely be eliminated, the objectives of an online pan-Northern presence, and its required content, should be determined with consideration to the following:

- Consumers' informational needs and how the site can meet the overall marketing objectives for tourism in Northern Ontario. Is the portal site serving these needs or is additional functionality and content required? Is there an opportunity to build an online presence that fills the current gap between lure and fulfillment, and that broadens the representation of different products and geographic references across Northern Ontario?
- The provision of an effective platform that can be utilized by various organizations as a call to action in their marketing activities. The site should easily incorporate the online needs of future sub-regional RTO marketing initiatives, without the need for sub-regions to create their own sites or to constantly build new micro sites.
- The new ways of driving traffic online and the opportunities provided by social media. Although the concept of the portal was innovative when it was developed, there are now many alternatives to drive traffic to a site. When it comes to SEO sometimes 'more is less' and the site needs to employ current search engine optimization (SEO) strategies and best practices,

addressing the overall structure of the site, information architecture, page naming, linking strategies, well written content, tagging etc. A lot of content alone does not equal an SEO strategy; a keyword strategy is also required and needs to work hand in hand with the SEO strategy/best practices.

- The quantity, quality and origin of partner sites that link to a Northern Ontario site. The key driver of the current site is a drive-thru style portal to link to partner sites; but some of these belong to tourism organizations whose uture is uncertain, and taken as a whole, the referred sites have content and functionality gaps.

- Management and budgeting for the Northern portal will be changing in the near future. A procurement process for a web provider for the portal is planned for 2012. In 2012/2013, OTMPC Northern Office plans to reallocate its budget in this regard and will likely have limited funds to dedicate to the initiative. Ongoing costs of the portal will need to be shared in the long term and ultimately managed by another organization.

2.4.2 Main Objectives of the Online Presence

The main objectives of a pan-Northern Ontario online presence should therefore be:

- To make it easier for the consumer to find travel information on Northern Ontario.
- To make it easier for the consumer to buy Northern Ontario tourism experiences.
- To make it easier for more operators in Northern Ontario to present their product to the consumer.
- To create e-marketing opportunities via database sign-ups.

2.4.3 Best Practice Examples

Best practice examples have been used as references to develop the content and functionality recommendations for the pan-Northern online presence.

These examples were selected based on the fact that they effectively use “destinations within the destination” to assist the user find the information they want. In addition, many of these use maps and basic geographic orientation as a method of helping people drill down to find the information they require:

- http://www.visitsweden.com/sweden/
  (the interactive mapping feature that is used in the cases of both regions and experiences was specifically noted)

- http://www.communityofsweden.com/
  (effective housing of user generated content)

- http://www.nothinglikeaustralia.com/ca/index.htm
  (click on Browse Experiences)
- http://www.australia.com/destinations/Destinations.aspx
- http://www.newzealand.com/travel/destinations/destinations-home-page.cfm
- http://www.hellobc.com/
- http://www.tourismpei.com/pei-contests

These sites are obviously much larger in scope, promoting tourism for an entire country or province, but they do provide some excellent examples of how to approach content presentation and the use of maps to guide the user. These examples could be executed on a scale suitable for Northern Ontario and address one of Northern Ontario's most significant challenges: a very broad base of experiences that is not consistent or coherent across a very large expanse of geography.

2.4.4 Recommended Changes to the Northern Portal

Although a recommendation for a new pan-Northern site was presented as part of the planning process, given the significant investment that has been made into the Northern portal and its functionality assets (CMS, mobile-friendly), the current site will remain as the platform for a centralized pan-Northern online presence.

Based on the key drivers and best practices cited above, it is recommended that the existing Northern portal site significantly evolve in terms of content, content acquisition, functionality, and management.

From a management perspective, it is recommended that management of the portal transition to the RTO while it works closely with OTMPC on the provision of content and to share certain costs.

The site would continue to fulfill a portal function by referring users to partner sites, but the focus will move away from a "drive thru" to a "one stop shop" providing a basic overview, travel ideas, geographic orientation, and booking capabilities. Those who are considering Northern Ontario will then be encouraged to further explore partner sites with an improved understanding of the region's unique selling features, tourism products and geography.

It is recommended that the key features of a re-developed Northern Ontario portal site would include:

- Database driven: the site would be fully database driven/dynamic to allow full content integration between all sections and types.

- Promoting operators and reservation system/booking capabilities: operator listings would be a key feature; this can include descriptions, contact information, along with feature pricing/special offers/packaging through a reservation system integrated into the site.

- Mapping feature: an interactive map on the home page could help users to familiarize themselves with Northern Ontario by viewing a map that can be used by "place", "experience", or other parameter.

- Building a database of opt-ins for sub-regional and OTMPC e-marketing: there is significant value in using the enhanced site as an opportunity to build a valuable database of opt-ins – consumers who sign up to receive additional and ongoing information – that could be utilized by OTMPC in its product marketing and by the RTO for specific sub-regional initiatives. Sign-ups should therefore be segmented in terms of their interest in specific places and experiences.

- An online "home" for sub-regional online needs: the site can feature sub-regional initiatives or promotions on an appropriate section of the site where additional time-bound content can be added to allow for a "micro site" type function. This would provide a consistent online call to action for all sub-regional marketing initiatives that presents the consumer with appropriate additional content to highlight the promotion (contests, special offers, download resources, etc).

- Geographic relevance: outside of pan-Ontario products, all content on the portal should be relevant to RTO 13.

- Geographic references: rather than linking through to geographic destinations as they are currently defined (cities and regional tourism organization names), the site would direct consumers to information housed on the site about the three sub-regions, whose content regarding "Places to Go" would incorporate not only "Destinations and Cities", but also "Routes" and "Natural Wonders", with a focus on best bet destinations and signature landscapes. Sub-regional content would also link to the appropriate tourism organizations to which it relates.

- Rebranding: as the portal becomes an initiative managed by the RTO, it is recommended that it is identified under the "Ontario's True North" umbrella.

- Links to OTMPC pan-Ontario product online offerings: The portal would continue to act as a portal to OTMPC's pan-Ontario product information in its current manner.

- Links to existing tourism organizations' sites: as mentioned above, there would be prominent links throughout the site to existing tourism organizations as appropriate, which would stem from content provided by the three sub-regions.

- Integration of dynamic content and social media: the refreshed site would contain many of the features that are currently part of the Northern portal site. Blog content will be both contributed and linked, which is comparable to what is being executed currently and is important for search engine optimization.

An increased emphasis on video and on user generated content, allowing visitors to post comments, videos, photos, etc. is recommended. The home page and all sub pages should also be designed to contain social media feeds. It is recommended that social media strategies (Facebook, Twitter, YouTube, Flickr) will be integrated and relevant web content would be pushed through these streams.
Recommendations with regard to content acquisition for the site include:

- More effective and centralized content development would replace the current strategy of provider-based dynamic content creation. An outline of which organizations would contribute content is found in EXHIBIT NINE.

- Management of content is a priority, and to ease this process, content would be strategically controlled by replacing current content providers with professionally written content coming from sources that are aligned with other tactical strategies. This would include content from media relations activities (repurposing of travel writer blogs, consumer travel blogs, video of editorial television coverage, travel writer stories and testimonials) and from "celebrities" within different product categories (preferably will existing online followings) who can be hired as bloggers.

- Rather than working with multiple destinations to provide content, content will be invited from the three RTO sub-regions and incorporated based on set editorial parameters.

- User generated content can also be considered as a significant content source, allowing those who have visited Northern Ontario to post comments, videos, photos, etc.

Recommendations with regard to the quantity and type of content for the site include:

- A combination and balance of core (static) and dynamic content is incorporated. Overall, the amount of dynamic content on the site may be reduced, but there will be an assurance that quality of content will take precedence over quantity of content.

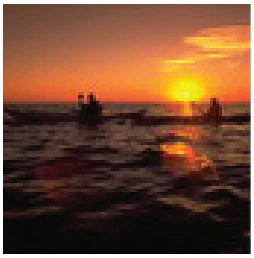
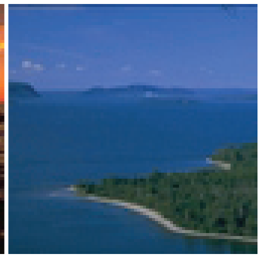
- Information is added to the site that is useful for the consumer at different stages of the trip decision process: from window shopping to planning, and from planning to purchase. The site should facilitate both online exploration and booking via travel ideas; geographic orientation; high quality trip information; the opportunity to opt-in to receive further information; the opportunity to purchase the experience (via special offers or packages); a central place to find tools and downloads such as vacation planners, regional guides, maps, etc.; and dynamic content such as videos, user generated content, blogs, images, and articles.

- The site should assist with pan-Northern place-based branding to improve the consumer's geographic understanding of Northern Ontario. The site would no longer direct consumers to discover Northern Ontario solely via existing tourism organization-dictated geographic name references (currently the five cities and six regions). The site's architecture, content and mapping features can help to position this vast region geographically in the consumer's mind and create awareness for "best bet" destinations, by also directing consumers to routes, landmarks, natural wonders and signature landscapes across the north.

- Core content would be optimized in terms of tagging and page naming, which will improve search engine traffic.

2.4.5 Other Online Strategy Recommendations:

- As part of the redevelopment of the Northern portal site, content could be outsourced to professionals and vendors of record in order to mandate this content with a marketing focus, minimize gaps in content, and to keep costs down significantly. It is likely that both a developer and active content manager will need to be procured to manage the reconfigured site on an annual basis (potentially through a single company).
- To ensure traffic to the Northern portal, a significant budget should be allocated towards Google Ad words. Core content should be optimized in terms of tagging and page naming, which will improve search engine traffic.
- RSS feeds can be used to distribute content and make content available to other websites. RSS feeds and alerts would be set up (Google alerts, blog search, etc) to track relevant content and use on the site where appropriate (e.g. TripAdvisor, TravelPost, other media mentions). The opportunities for this type of content will increase with the recommended emphasis going forward on media relations activity.
- Financial resources should be budgeted to refresh and upgrade OTMPC's product sites and the Canada's Great Outdoors site to incorporate social media tactics outlined below.
- Canada's Great Outdoors would direct users to sub-regional pages on the portal site instead of city and regional toursim organization websites.

2.5 Social Media

Given its importance in consumer trip planning and the fact that most tourism organizations are involved in it in some manner with varying degrees of effort and success, social media will become an increasingly important tactical strategy over the next five years.

2.5.1. Social Media Channels

Social media channel categories for consideration to market tourism in Northern Ontario include:

- Social Networks (Facebook, LinkedIn, MySpace)
- Blogs (Wordpress, Typepad, Blogger, Tumblr)
- Microblogs (Twitter)
- Content Sharing (YouTube, Vimeo, Flickr, Slideshare)
- Social Bookmarking (Facebook Like, Digg, Reddit, StumbleUpon, Delicious)
- Location/Geolocation Services (Foursquare, Gowalla, Facebook Places, Loopt)

Blogging, video sharing and photo sharing are the most important social media initiatives in the context of destination marketing. Video and blogging are already central to the pan-Northern and OTMPC web site recommendations, so these would be key social media tactics that should be leveraged outside of the websites (e.g. YouTube Channel, Flickr or other Photo Sharing tools). Content of the websites should be repurposed into social media execution, with social media content calendars designed to push out via FB and Twitter in order to ensure social media initiatives are efficient and cost effective.

Social media channel priorities should also be chosen based on their fit and alignment with specific marketing objectives. These include:

- Generating brand and product awareness for Northern Ontario avid product and places and experiences.
- Lead generation, to create prospective customers for tourism operators.
- Community building, to encourage ongoing interaction and a relationship with the avid products, places and experiences of Northern Ontario and increase the opportunity for third party endorsement.
- Customer care, so that an established audience can maintain a positive relationship with Northern Ontario.

As a result, the recommended "best bet" social media channels are defined as follows:

Social Media Channel	Marketing Purpose
Facebook	Brand awareness Customer care Lead generation Community building
Twitter	Brand awareness Customer care Lead generation Community building
Blog(s) (website integrated)	Brand awareness Lead generation Community building
YouTube	Brand awareness Lead generation Community building
Flickr	Brand awareness Lead generation

2.5.2 Social Media Management and Content

The following outlines recommendations with regard to organizations that will manage and/or contribute to Northern Ontario social media plans:

- RTO 13 can manage a social media plan based on marketing strategies and tactics supporting "Ontario's True North" and pan-Northern marketing activities. The content focus would be on destinations and places as well as experiences.
- OTMPC Northern Office can manage a social media plan based on marketing strategies and tactics supporting Canada's Great Outdoors and its product programs; it will also contribute content relevant to Ontario's True North. Content would focus on specific experiences, namely: fishing, hunting, motor sports, and soft outdoor adventure (Canada's Great Outdoors product).
- RTO 13A, 13B, 13C would not manage their own social media plans, but contribute content to RTO 13 specific to sub-regional marketing activities where strategies dictate use of social media tactics.
- NORTAs, Cities, DMOs, Tourism Operators are likely to manage their own social media plans and will contribute content to RTO 13.

The following chart identifies how the various organizations will manage/contribute content to Northern Ontario social media initiatives:

Organization	Manages a Social Media Plan	Content Contributor To RTO 13 Social Media	Content Contributor to OTPMC Northern Office Social Media
RTO 13	YES	YES	NO
RTO 13A	NO	YES	NO
RTO 13B	NO	YES	NO
RTO 13C	NO	YES	NO
OTMPC NORTHERN	YES	YES	YES
NORTAS	MAYBE	YES	NO
CITIES	MAYBE	YES	NO
DMOs	MAYBE	YES	NO
TOURISM OPERATORS	MAYBE	YES	NO
INDUSTRY PARTNERS/ ASSOCIATIONS	N/A	YES	YES
CORPORATE PARTNERS/ CELEBRITY EXPERTS	N/A	NO	YES
MEDIA/ BLOGGERS	N/A	YES	YES
VISITORS	N/A	YES	YES

Further recommendations with regard to the social media strategy for Northern Ontario are found in EXHIBIT TEN.

Given the time involved, social media management and maintenance can be outsourced, to cover the areas of:

- Strategy/Content: Development of monthly content calendars; researching and scheduling content and postings; leveraging social content from regional tourism stakeholders/partners.
- Management: Posting/re-posting Facebook content, tweeting/re-tweeting/ hashtag Twitter content, monitoring and managing engagement, sentiment and conversation, updating Facebook images as necessary; audience building.
- Measurement: Weekly summary reports.

2.6 Traditional Marketing Tactics

Participation by the RTO sub-regions in Northern Ontario marketing initiatives provides an opportunity to enhance and refresh the approach to some traditional marketing tactics as follows:

- Address the current reliance on and need for multiple print publications via consolidation. It is recommended that an inventory of existing publications is conducted to determine where publications might be brought together into a single initiative.
- Develop new, high quality publications. These can include those that incorporate multiple destinations and experiences that cross traditional tourism organization boundaries, such as touring route guides/trip planners/ logbooks (see Alaska's "The Milepost" trip planner as a best practice), or broader "wilderness" guides incorporating multiple activities. New publications could also include a singular lure publication for "Ontario's True North" with information about all three sub regions that could be distributed in the following contexts:
    - Markets and venues where Northern Ontario is competing against larger jurisdictions (e.g. Quebec, Manitoba) as a tourism destination.
    - Contexts where the existing publication inventory dictates that multiple lure pieces would be required.
- Enhance consumer show participation by tourism organizations. This can be achieved through supporting shows with timely in-market media activities (e.g. advance direct database marketing to the local audience and media relations activities).

Such initiatives may free up the resources of tourism organizations to focus on other efforts.

2.7 Sub-regional Tactical Priorities

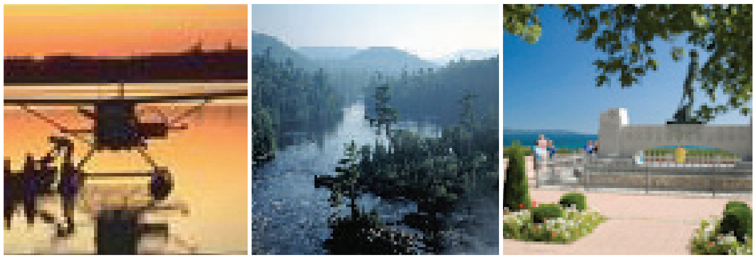
The RTO sub-regions are well positioned to fill the gaps and enhance and augment the product-focused tactical strategies of the OTMPC Northern office, the limited pan-Northern marketing activities of RTO 13, and the more localized efforts of regional and city tourism organizations.

Using all of the tactical suggestions above, it is recommended that the sub-regions focus on incremental marketing activities that are traditionally beyond the budgets or mandates of existing tourism organizations. Examples include:

- Marketing of products that cross traditional geographic-based marketing boundaries – these include sub-regional boundaries, boundaries between regions, and boundaries between regions and cities. Examples: marketing touring routes, sport tourism or meetings and corporate product in a partnered fashion.
- Marketing of destinations that cross traditional marketing boundaries – these include sub-regional boundaries, boundaries between regions, and boundaries between regions and cities. Example: marketing a city and its adjacent region in a seasonal campaign, in a partnered fashion.
- Marketing of emerging products that have broad and significant economic impact to ensure significant resources are applied over the longer term to assist in bringing these products to market. Examples: programs dedicated to Great Lakes cruising or fly fishing.
- Marketing of best bet niche products that are currently under-served by the existing marketing efforts or resources of tourism organizations. Examples: Lake Superior Circle Tour.
- Time bound marketing campaigns with broad impact that require significant marketing dollars in a relatively short time frame. Example: a seasonal campaign bringing together urban and rural product.

Other priorities for the sub-regions should include:

- Marketing initiatives that would be best executed (as a function of their scope and size) by working with an agency of record and with a significant budget allocation.
- Marketing initiatives that will reduce duplication and marketing costs, or make unnecessary marketing tactics redundant by bringing partners together to consolidate efforts. Example: combined visitor guides.
- “Experimental” or “first time” marketing initiatives with demonstrated opportunity that allow tourism organizations to engage in new tactical approaches that would previously have been too risky or expensive for the organization to participate in. Example: entry into a new market by a region or city, not already within identified RTO best bets, to promote a specific product. Example: a targeted campaign to bring school groups to an area.



It is recommended that sub-regional tactical priorities address “best bet” products, as follows:

North Eastern Ontario (13A)	North Central Ontario (13B)	North Western Ontario (13C)
Avid Fishing and Hunting Broad Outdoors Touring: Motorsports (ATV, Motorcycle, Boating), Automobile, Rail Gateway Cities Touring Festivals and Events Georgian Bay Coastal Route	Avid Fishing and Hunting Broad Outdoors Touring: Motorsports (ATV, Motorcycle, Boating), Automobile (Itineraries , Cities and Towns), Rail Gateway City Festivals and Events Private Sector Attraction (Tour Train) Winter Tourism	Avid Fishing and Hunting Broad Outdoors Touring: Motorsports (ATV, Motorcycle, Boating), Automobile (Itineraries, Cities and Towns) Gateway City Festivals and Events Great Lakes Cruising

3.0 Measurement and Research

Some of the overall objectives and goals set out in the strategy will be very difficult to measure in any immediate way. Getting a sense of whether overall tourism receipts, overnight pleasure trips, and visitation from specific markets is on the increase will not be known until up to date statistics are available, and as mentioned above there is a significant lag time with this.

Fortunately, it will be easier to track and measure the success of the major marketing tactics recommended in the plan to determine what is and is not working. Measurement of these tactics should go beyond activity measures (limited to “what was done” – e.g. content created, ads placed), to incorporate effectiveness measures, or “what resulted from what was done”.

Key measurement areas should include:

- Web analytics: pan-Ontario and pan-Northern website performance can be tracked, not only to determine if the sites themselves are working, but also as a means to determine the success of sub-regional marketing initiatives that are linked to the sites. Key analytics include unique visitors, time on site, page views that indicate travel intention (e.g. itineraries) and referrals to partner sites.
- Media relations outcomes: tracking of the amount of earned media related to activity and the related impressions that result.
- Social media measurement: measurements such as daily active users, post views, likes, and retweets will track how effectively Northern Ontario is building an audience and harnessing third party endorsement.

- Overall campaigns: as OTMPC embarks on campaigns in new markets, or the sub-regions execute a campaign around an emerging product, integrated campaigns can be measured in a variety of ways, including resulting traffic to web sites, numbers of leads created, resulting opt-ins, and number of inquiries. It is also encouraged that conversion studies be conducted in the case of such campaigns where those who inquired, opted-in, or entered a contest are contacted to determine if they visited.

Another key measurement area, specifically for the RTO, should be tourism operator participation in marketing programs. It is hoped that RTO marketing activities will result in a greater number of operators contributing packages, special offers and story ideas for various marketing tactics.

If a pan-Northern reservation system is adopted, or links to partner sites' booking information is used as part of specific campaigns or tactical strategies, online effectiveness in terms of conversion can actually be tracked, leading to return on investment calculations.

In order to track these measurements overall for Northern Ontario, an annual review of the plan is recommended that would bring together RTO13 and OTMPC Northern Office to share results and determine where progress has been made and where things should be tweaked or changed. These overall measurements can also be used to help guide OTMPC Northern Office and RTO13 sub-regional marketing planning on an annual basis.

Another important rationale for an annual review is to determine material changes in the tourism operating environment or newly available market intelligence that should be considered going forward. With a five year outlook, the plan is sure to be subject to such changing factors and therefore needs to be revisited at least annually.

Indeed, the lack of available current research is a significant disadvantage in the development of the strategy. It is recommended that the planned OTMPC Northern Ontario market research focus on the following areas in order to help further inform the strategy:

- Best bet U.S. and European markets related specifically to the outdoor programs.
- Trip motivators for Northern Ontario, after defining its activities more closely (e.g. fly-in fishing, specific species fishing versus the catch-all of "angling").
- Value of different emerging products as trip motivators.
- Brand resonance and awareness of destinations, signature landscapes and natural wonders in Northern Ontario.
- Relevance to the consumer and the trip motivation value of "water" if used as a central branding tenet for Northern Ontario outdoor products and destinations.

4.0 Roles and Responsibilities for Marketing Efforts

4.1 Assumptions and Key Drivers

Determination of the recommended roles and responsibilities for all levels of marketing efforts was determined based on the following principles:

- Minimize duplication and maximize resources. Each organization should "go where others cannot go and reach where others cannot reach", in terms of their abilities to reach specific markets, to promote best bet products and to undertake certain types of tactics. Organizations should plan and implement the strategies and tactics that best match their available resources and skill sets. This will help to ensure that duplication is minimized. Resources may change over time, but the strategy takes into account resources and skill sets as they stand today and how they are realistically anticipated to develop in the near future.

- Fill the gaps -- augment and enhance. Roles and responsibilities should focus not solely on minimizing or eliminating duplication, but also on ensuring that any gaps in current marketing efforts are filled. Therefore, there is equal weight applied to the principle that organizations' marketing efforts should augment and enhance the marketing efforts of other organizations involved in tourism marketing in Northern Ontario.

Determination of the recommended roles and responsibilities for all levels of marketing efforts was also based on the following assumptions about organizational mandates:

- OTMPC mandate. It is assumed that OTMPC Northern Office will continue to engage in pan-Ontario based marketing of products. In order to fit within the larger context of the OTMPC's mandate, it is inevitable that the outdoor product marketing activities of the Northern Office would continue to incorporate some Southern Ontario product.

- RTO mandate. Through its vision statement, the mandate of RTO13 has been defined as a single Not-for-Profit Regional Tourism Organization that will coordinate, align and invest in sub-regional programs and become the lead in identified pan-Northern management functions; co-ordination of marketing, product development, workforce and industry training, and investment attraction.

The recommendations are also based on the following assumptions about skill sets, which are further to the analysis of current skill sets and resources outlined above:

- It is not likely that the OTMPC Northern Office would add additional permanent staff to the current team.

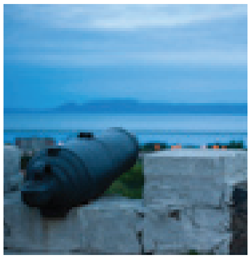
- RTO 13 will continue to have minimal staff, and no staff would be dedicated to marketing coordination or implementation.

- It is not likely that the existing skill sets of regional tourism organizations will change materially in the near future. Those organizations that could be viewed as "strong" will likely remain so, and those that face sustainability issues will not likely be in a position to improve their existing skill sets.

4.2 Summary of Contributions to Northern Ontario Marketing Efforts by Organization

The table outlines the recommended contributions to Northern Ontario marketing efforts by organization:

Organization	In Marketing Northern Ontario: Where Can it Go/Reach That Others Cannot? Where Can it Fill Gaps, Augment and Enhance?
OTMPC Northern Office	▪ Lure activities in new geographic markets. ▪ Lure activities with an avid product focus. ▪ Promotion of a pan-Northern brand proven to work in the US market – "Canada's Great Outdoors". ▪ A significant online presence for pan-Ontario product that correlates with Northern Ontario best bet products and provides a platform for third party endorsement of this product (individual product sites and Canada's Great Outdoors site, contributions to the northern portal). ▪ Provision of online product program content and of social media content stemming from media relations, spokesperson and corporate partnership activities, for both the Northern portal and its product sites. ▪ Media relations activities that focus on Northern Ontario "best bet" products provided by Northern Ontario tourism operators. ▪ Identifying and working with corporate partners who wish to work with "Ontario", while focusing this effort on Northern Ontario "best bet" products and avid products. ▪ Development of partnerships with high profile spokespeople to endorse Northern Ontario "best bet" products. ▪ Partnering as appropriate with the RTO, sub-regions, cities and regional tourism organizations to deliver marketing programs when promoting Northern Ontario best bet products under the Canada's Great Outdoors brand.



RTO 13 Board and Staff	▪ Marketing initiatives that benefit all sub-regions throughout RTO 13 and all tourism operators within Northern Ontario (e.g. Northern Ontario web site portal, lure publication), under the "Ontario's True North" designation.
	▪ Bridging the gap between lure and fulfillment: provision of a pan-Northern online reservations system for use by individual tourism organizations and/or operators.
	▪ An online presence for Northern Ontario (an enhanced Northern website portal) that provides:
	   ▪ Information on both products and destinations within a larger, regional context; an all-encompassing representation of tourism interests in Northern Ontario.
	   ▪ A high quality and consumer friendly web site for Northern Ontario as a tourism destination.
	   ▪ Information on both products and destinations that are not currently provided by existing OTMPC, city or regional travel sites.
	   ▪ Functionality that is not currently provided by existing OTMPC, city or regional sites.
	   ▪ A platform for third party endorsement of Northern Ontario destinations and experiences.
	   ▪ An online platform that can be extended to serve various sub-regional marketing initiatives as they are developed.
	▪ Provision of content for the enhanced Northern portal from the sub-regions.

RTO Sub-regions in A, B, C	▪ Provision of marketing opportunities that will include operators who are not currently members of tourism organizations. ▪ An all-encompassing representation of tourism interests in each sub-region in terms of marketing efforts. ▪ Incremental marketing activities that are traditionally beyond the budgets or mandates of existing tourism organizations (see Section 2.7 for detail). ▪ Marketing initiatives that would be best executed (as a function of their scope and size) by working with an agency of record and with a signifi cant allocation of budget. ▪ Marketing initiatives that reduce duplication and marketing costs by bringing partners together to consolidate efforts (e.g. combined visitor guides). ▪ "Experimental" or "first time" marketing initiatives that allow tourism organizations to engage in new tactical approaches that would previously have been too risky or expensive for the organization to participate in. ▪ Provision of sub-regional content for any RTO pan-Northern initiatives (portal website, lure publication). ▪ Soliciting operator participation in a pan-Northern reservations system. ▪ Providing sub-regional content for the OTMPC provincial website, www.ontariotravel.net.

Cities, NORTAs, Sector Organizations	▪ Role as a lead city or lead regional organization for the RTO sub-region as selected through RFEI process. ▪ Participation on the RTO Board to ensure an all-encompassing representation of tourism interests in all pan-Northern and sub-regional marketing efforts. ▪ If not a lead city or lead regional organization, participation in the sub-regional marketing committees/task forces to ensure an all-encom passing representation of tourism interests in each sub-region in terms of marketing efforts. ▪ Branding specific destinations, more localized areas or sectors. ▪ Serving the specific marketing needs of its tourism operator members. ▪ Assisting members with closing the sale by providing leads from its lure functions. ▪ Providing in-market visitor services (e.g. visitor centres, maps, guides). ▪ Developing positive relationships with tourism operators and presenting them with RTO or OTMPC marketing opportunities as appropriate. ▪ Assisting OTMPC and the sub-regions by providing specific services to execute marketing activities as appropriate – for example, staffing a consumer show whose market is a fit with the operators within its membership.
Operators	▪ Participation in the Northern Committee, RTO Board or sub-regional marketing committees/task forces to ensure an operator focus remains in all pan-Ontario, pan-Northern and sub-regional marketing efforts. ▪ Participation in the RTO 13 pan-Northern reservation system to assist in closing the sale. ▪ Provision of online content for use by the RTO sub-regions on the Northern portal site and in social media efforts – e.g. images, story ideas. ▪ Provision of story ideas and updates for media relations activities under taken by OTMPC. ▪ Hosting media (by providing media rates) to help drive an expanded media relations program. ▪ Participation in marketing opportunities provided by new RTO initiatives. ▪ Provision of compelling and consumer-friendly product for promotion at the pan-Northern and sub-regional levels – e.g. packages, special offers.

5.0 Roles and Responsibilities for Marketing Planning and Implementation

5.1 Key Considerations

In terms of the planning and implementation of marketing efforts for Northern Ontario, the following were important factors to consider:

- Future of the Northern Committee: there has been much recent discussion at OTMPC about the restructuring of committees. There is consensus that the Northern Committee is not currently operating in an effective fashion, with little momentum or engagement. For the last year and a half, the committee has not been focused on its main mandate (to advise on and review program areas and marketing tactics), due to a focus on the ramifications of the development of the RTO and resulting questions about budget allocations to Northern Ontario.

- Sub-regional management options: during the planning process, a number of different scenarios were explored in order to recommend the ideal management structure for the three RTO sub-regions (see EXHIBIT ELEVEN). The requirements of the Ministry of Tourism and Culture regarding procurement for RTOs was also considered, to ensure that any recommendation as to the administration and management of the sub-regional organization by an existing organization with any fees paid would work within these requirements.

- Sustainability for tourism and sector organizations: throughout the consultation process for the plan, there was much discussion around the potential for implementation of RTO sub-regional marketing initiatives by existing tourism and sector organizations (e.g. cities, NORTAs, NOTO, Direction Ontario) on some type of fee for service basis (similar to the MOU agreements now in place with OTMPC and its partners). There has also been much discussion as to whether delivery and implementation of RTO programs might provide much needed sustainability for existing tourism and sector organizations.

5.2 Recommendations for Marketing Planning and Implementation

5.2.1 The Northern Committee

There is an important role for the Northern Committee in marketing planning and marketing implementation for Northern Ontario.

The committee ensures a cooperative marketing planning process is applied to the allocation of a significant budget for tourism in Northern Ontario; and that this process includes input from Northern Ontario tourism stakeholders, particularly tourism operators. It also provides a direct connection and voice to the OTMPC Board of Directors for Northern Ontario.

It is recommended that the Northern Committee continue but that significant changes are put in place in terms of its operation. New members should be added (as active members of the committee), governance should be reviewed, and new members should be chosen through a transparent nomination process with consideration given to the marketing expertise they can bring to the table. The main function of the committee should be to review and comment on the annual marketing plan of the OTMPC Northern office, and undertake periodic reviews of plan progress and results.

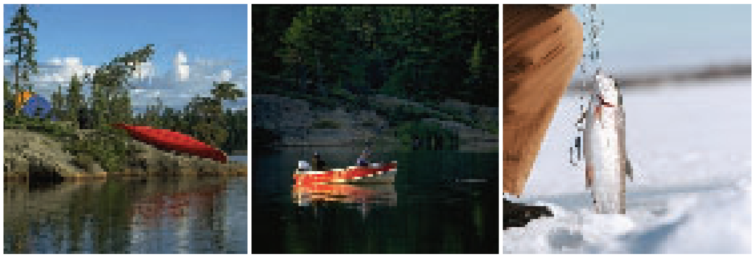
5.2.2 RTO Sub-regional Management

The following RTO sub-regional management principles are recommended:

- Each sub-region will adopt the same management structure.
- There is one regional lead and one city lead per sub-region, to manage sub-regional marketing planning and implementation.
- These two organizations would work with a marketing committee/task force made up of other tourism stakeholders in the sub-region for the purposes of marketing planning and implementation.
- In sub-regions where extra personnel are required for this purpose, it is up to the sub-region to make those arrangements, and as such, those persons report to and are employed by the sub-region (rather than on a pan-Northern basis under the auspices of the RTO).
- The RTO will provide funding for the purposes of capacity building to the lead city and lead regional organization in each sub-region. This funding will correlate with the tasks required of these lead organizations to plan and implement sub-regional marketing activities.

This approach ensures a balance between rural and urban perspectives and focus; a sharing of responsibilities and tasks to make a significant workload more practical; and the leveraging of tourism marketing knowledge, expertise and skill sets that currently exist in the sub-regions.

Ultimately the lead organizations would be chosen through an RFP/RFEI process for a multi-year contract (a five year term with a two year review is suggested). Preference would be given to organizations with demonstrated capacity and sustainability; that have a demonstrated ability to work collaboratively with industry stakeholders; that have support from tourism operators within their region and represent the industry at large; and that have previous success in managing and reporting on RTO 13 priority projects.



It was evident as part of the current tourism marketing landscape review that specific organizations in the sub-regions would meet the criteria outlined above -- in 13C, the city of Thunder Bay and Sunset Country, and in 13B Algoma Country and the city of Sault Ste. Marie. Sudbury would meet the criteria for a lead city in 13A, but there is currently no clear regional lead in this sub-region. In this case, the RTO could hire a co-ordinator through an accepted human resources or RFP process, with the ultimate goal of creating a new organization in 13A with the capacity to act as regional lead. There is also a lack of capacity for the larger group of cities in 13A, and it is expected that the regional lead could possibly fill these gaps.

There will be occasions where other existing tourism and sector organizations would be selected to assist with the execution of sub-regional marketing programs. It is anticipated that these occasions might include working with agencies of record or other suppliers to deliver marketing programs in areas where they have specific product expertise; bringing operators to the table to participate in marketing initiatives, via an on-the-ground, direct sales function; and ensuring that visitor servicing functions are executed. It may be difficult to ensure co-operation from existing tourism and sector organizations in these areas unless it is executed on a fee for service basis. If this fee is in excess of $5,000, the MTC may require a competitive procurement process, in which case it is recommended that the RTO establish criteria for the organizations best placed to provide the service. The criteria would be similar to those above, and would include past experience in implementing programs of a similar scope and product focus, and capacity to deliver the program in terms of human resources and skill sets.

5.2.3 Use of Agencies of Record

It is recommended that agencies of record are used in order to implement the various marketing initiatives of the sub-regions. Given existing tourism organizations' different areas of product expertise and the amount of work involved in implementing additional initiatives developed as part of RTO sub-regional budgets, outsourcing will remove a lot of procurement workload and ensure consistent approaches to creative and key messages. The sub-regional lead organizations would be the primary liaison and fulfill the key function of coordinating with an AOR or other vendors.

5.2.4 Planning Process

- OTMPC Northern Office can participate in sub-regional planning and share their annual plan with the sub-regions to highlight opportunities for co-ordination and cost sharing. Sub-regions should take into account OTMPC tactics and prioritize opportunities for this cost sharing. It is recommended that this collaborative planning take place as early on in the planning process as possible.
- Development of sub-regional marketing plans should focus on the tenets of the strategy as presented here as well as take into account any current market research.
- The plans should have clear objectives, set targets and be measureable
- RTO 13 Board and staff should review plans in order to coordinate and align any objectives and resulting tactics that are common across the sub-regions and to identify tactics that should be pan-Northern in execution.

5.3 Summary of Contributions to Northern Ontario Marketing Planning and Implementation by Organization

The table outlines the recommended contributions to Northern Ontario marketing planning and implementation by organization:

Organization	Role In Planning	Role In Implementation
OTMPC Northern Office	Northern Office annual marketing plan and budget developed by staff team in consultation with OTMPC and Northern Committee. Works with RTO 13 Board and staff in planning cost shared pan-Northern initiatives, such as the Northern Ontario web portal. Works with RTO sub-regional lead organizations in planning cost-shared sub-regional initiatives.	OTMPC Northern Office staff works with outside suppliers (e.g. AOR, media relations firm) and Northern tourism organizations procured by OTMPC as appropriate to deliver programs.

RTO 13 Board and Staff	Board and staff develop and oversee plan for limited pan-Northern initiatives and work with OTMPC in planning cost-shared initiatives. Board approves sub-regional plans.	Execution is managed by suppliers as appropriate (e.g. AOR). Note that the same AOR may elect to be used by both the Northern office and the RTO.
RTO Sub-regions in A, B, C (lead organizations and marketing committees/ task forces)	Individual planning by A, B and C sub-regional task forces, led by sub-regional lead organizations. OTMPC to take part in each of the planning processes to determine cost-shared initiatives.	Sub-regional lead organizations will execute or outsource to AOR as appropriate. Sub-regional lead organizations will work with OTMPC Northern office as appropriate on cost-shared initiatives.
NORTAs, cities, sector organizations and other tourism offices	Some organizations may be named lead city or lead regional organization for their RTO sub-region. Some organizations will be part of marketing committee/task forces for A, B, C. Some organizations will be part of the RTO 13 Board. Each organization develops and drives its own annual marketing plan for their organization. Can help to identify gaps in visitor servicing.	Each NORTA, City, sector organization or other tourism office individually executes its own marketing plan.

6.0 Financial Resource Allocations

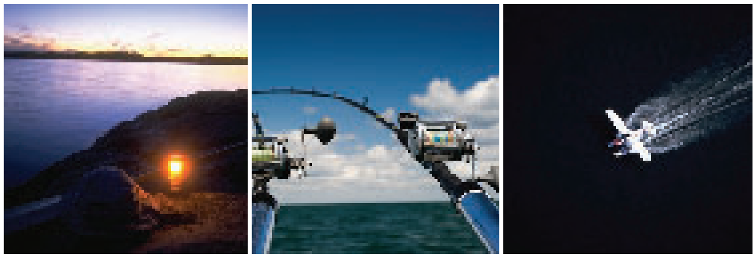
An overview of the relationship of various tourism organizations to the total budget available for Northern Ontario tourism marketing is found in EXHIBIT TWELVE. A matrix of contributions to tourism marketing by organization by budget is found in EXHIBIT THIRTEEN.

The main recommendations for financial resource allocation include:

- OTMPC can consider reallocating the funding currently utilized for its partnership agreements toward media relations activities dedicated specifically to the North, to corporate sponsorships/endorsements/spokespeople that will work directly with the North, and to an annual budget for cost-shared initiatives with the sub-regions in existing markets. A comparatively small portion of this budget can be applied to the instances where OTMPC needs to work directly with a tourism organization on a fee for service basis (e.g. for the provision of photography, consumer show assistance, etc).
- OTMPC can consider sharing the cost of annual maintenance of the enhanced Northern portal website with the RTO. It will also need to allocate some funds to content provision; however, much of this will come from other marketing activities (media relations, spokesperson agreements, etc). This will still allow for some reallocation of the existing budget for the Northern portal.
- OTMPC can consider dedicating the majority of tactical spend to integrated campaigns in new markets. Reallocated Northern Portal funds for example, could be applied to these campaigns, which would use existing product websites and the Canada's Great Outdoors website as the call to action.
- OTMPC can consider allocating the majority of online and interactive spend toward social media initiatives, upgrading of the product program and Canada's Great Outdoor web sites, and e-marketing deployment.
- OTMPC can consider restructuring its staff by marketing tactical area rather than by product program. Staff would then be redeployed in the following three priority areas: interactive (online and social media), media relations, and corporate partnerships. Integrated campaigns could continue to be executed by an agency of record who would report to the team as appropriate. This restructuring would better reflect budget allocation breakdowns and priority tactical areas.

The main recommendations for financial resource allocation for RTO 13 and the RTO 13 A, B and C sub-regions include:

- RTO 13 will allocate funds for capacity building towards the lead city and lead regional organization in each sub-region.
- It is anticipated that with the sub-regional management model recommended, that the administrative expenses at the pan-Northern level can be reduced from the current 10% to a figure closer to 7.5%.



- For the first year of the strategy, 2011-12, the majority of funds can still be allocated to marketing while the funds required for the other three pillars is determined via the destination development plan that will be in the works.
- With the advent of activities being undertaken in the other three pillars, a specific allocation to marketing is recommended. However, it should be noted that the destination development plan outlining the priorities for the other pillars (investment development, training and product development), has not been completed, and the resource needs for these components is currently undetermined. There may also be additional resources available to RTO 13 for these pillars by leveraging funds from other government sources or the private sector. Given these unknown factors, it is recommended that the RTO Board determine a marketing budget allocation once this crucial information is in hand.
- During the first year of the strategy, there would be a significant up-front spend to initially enhance and evolve the existing Northern Ontario portal website and it is assumed that this cost will be covered by the RTO 13 budget.
- From year two of the strategy, it is anticipated that the annual costs to maintain the site would be significantly lower than those currently incurred for the Northern portal (as well as shared equally with the OTMPC Northern Office). This currently costs approximately $200,000 per year, but could be reduced by eliminating translation services and going through a new procurement process for web services.
- One of the major tactical recommendations is the adoption of a pan-Northern online reservation system. This considerable expense could be considered either a product development or a marketing cost.
- It is anticipated that the current allocation for sub-regional programming will continue to be divided between A, B, and C based on roofed accommodation receipts. As they plan for this year, the sub-regions are allocating on a percentage basis toward different product areas (e.g. touring, soft outdoors, fishing and hunting, winter, and MC&IT). In future, in order to implement the marketing strategy as outlined, the sub-regions may also want to consider allocations based on geographic markets and type of initiative (new/emerging product, seasonal campaigns, etc.).
- It should be noted that additional staff/resources may need to be provided via sub-regional RTO budgets in A, B, C for in market visitor servicing and/or operator liaison tasks. The RTO may determine that these are defined as product development costs.

APPENDICES

EXHIBIT ONE:
Documents Consulted

- Northern Ontario Five Year Marketing Strategy 2008-2012
- Discovering Ontario: a report on the future of tourism, 2009
- Ontario Tourism Competitiveness Study, Presentation, 2009
- Growth Plan for Northern Ontario, 2011, Ministry of Northern Development, Mines and Forestry
- Travel Intentions Survey, May 2010 (Summer/Fall), Ministry of Tourism
- Travel Intentions Survey, Spring/Summer, March 2010, Ministry of Tourism
- Travel Intentions Survey, Spring/Summer, March 2011, Ministry of Tourism
- Tourism Profile, Regions 10-12 Combined North, Statistics Canada, 2008 Ministry of Tourism
- Tourism Performance Bulletin, Ministry of Tourism and Culture, December 2010 Ministry of Tourism
- Regional Tourism Profiles, 2008, Region 13a, 13b, 13c
- Tourism Volume, Value and Characteristics in Northern Ontario, 2008 (Domestic and International Travel Surveys), Prepared for FedNor by Research Resolutions & Consulting Ltd.
- Francophone Tourism Toolkit for RTO's – Francophone Markets and Best Practices, Destination Ontario
- Francophone Tourism Workshops – RTO 13A, RTO 13B, RTO 13C, Destination Ontario
- Prizm Profiles: Ottawa-Hull CMA, Winnipeg CMA, Winnipeg CMA vs. Manitoba HHDs, Ottawa-Hull CMA vs Ontario HHDs
- White Paper: The Case for the Province of Ontario to Engage Strategically in Sport Tourism, 2011, Canadian Sport Tourism Alliance and Tourism Toronto
- Transition Working Group Region 13 – Transition Plan – July 27, 2010
- Vision and Mission Statement – RTO 13
- RTO 13 Bylaws
- Minutes, 13A Tourism Coordination Meeting, April 6, 2011
- 13A – The Possibilities, June 2010, Ontario's Wilderness Region
- Northern Ontario – Principles for the Foundation of a Single Northern DMMO, Ontario's Algoma Country, December 2009

- Rationale for a Single Northern DMMO, Presented by Rob Skelley, September 2009
- Ontario's Algoma Country Response to Consultations, Regional DMMOs
- Mapping Ontario's Future – NOTO Responds, September 2008
- Establishing Regional Tourism Organizations in Ontario, Presentation from Meeting with OTMPC, May 2010
- Northern Ontario RTO 13 2011-12 Planning Process
- Northern Portal Editorial Document – Measuring Success, 2011
- Developing Content for the Northern Ontario Web Portal
- Northern Ontario Web Portal – Editorial Guides and Templates
- Project Brief – Recreational Motorsports for Tourism 2009-2010
- Creative Brief: Provincial Recreational Motorsports Program 2008/09
- Creative Brief: Angling 2010/11
- Creative Brief: Hunting 2010/11
- Angling Program US Media Flowchart 2010/11
- Ontario's Recreational Motorsports Program: Marketing tactics
- Motorsports Brief, May 31, 2010
- Ontario's Motorsports 2008/2009
- OTMPC Cities of the North Final Report, March 15, 2011, Tourism Sault Ste Marie
- Ontario's North Final Claim Report, March 15, 2011
- Fee for Service Contracts 2010/11
- Francophone Tourism Marketing Opportunities and Services
- Algoma Country Marketing and Business Plan, August 2010
- Ontario's Algoma Country – Final Report OTMPC – MOU 2010/2011
- 2011 Marketing Plan – Ontario's Wilderness Region
- 2011 Strategic Plan – Ontario's Wilderness Region
- 2011 Marketing Review – NOSTA
- Web Statistics – NOSTA

- Rationale for a Single Northern DMMO, Presented by Rob Skelley, September 2009
- Ontario's Algoma Country Response to Consultations, Regional DMMOs
- Mapping Ontario's Future – NOTO Responds, September 2008
- Establishing Regional Tourism Organizations in Ontario, Presentation from Meeting with OTMPC, May 2010
- Northern Ontario RTO 13 2011-12 Planning Process
- Northern Portal Editorial Document – Measuring Success, 2011
- Developing Content for the Northern Ontario Web Portal
- Northern Ontario Web Portal – Editorial Guides and Templates
- Project Brief – Recreational Motorsports for Tourism 2009-2010
- Creative Brief: Provincial Recreational Motorsports Program 2008/09
- Creative Brief: Angling 2010/11
- Creative Brief: Hunting 2010/11
- Angling Program US Media Flowchart 2010/11
- Ontario's Recreational Motorsports Program: Marketing tactics
- Motorsports Brief, May 31, 2010
- Ontario's Motorsports 2008/2009
- OTMPC Cities of the North Final Report, March 15, 2011, Tourism Sault Ste Marie
- Ontario's North Final Claim Report, March 15, 2011
- Fee for Service Contracts 2010/11
- Francophone Tourism Marketing Opportunities and Services
- Algoma Country Marketing and Business Plan, August 2010
- Ontario's Algoma Country – Final Report OTMPC – MOU 2010/2011
- 2011 Marketing Plan – Ontario's Wilderness Region
- 2011 Strategic Plan – Ontario's Wilderness Region
- 2011 Marketing Review – NOSTA
- Web Statistics – NOSTA
- Kenora Marketing Plan

- Web Statistics – City of Sudbury
- City of Sudbury Marketing Plan Outline 2010
- Rainbow Country 2009/2010 Year End Review
- Rainbow Country OTMPC Final Report, March 2011
- Georgian Bay Destination Development Final Report, Tourism Development Fund, March 2010
- ONN Marketing Activities January to December 31, 2010
- ONN Planned Marketing Activities, January to December 2011
- Tourism Sault Ste Marie Business Plan, 2010
- TSSM 2010-2014 Strategic Plan Summary
- Premier-ranked tourist destinations frameworks for North of Superior Tourist Association
- Premier-ranked tourist destinations frameworks for Greater Sudbury

EXHIBIT TWO:
Telephone Interviews Conducted

Organization	Name
RTO 13	Graham Campbell, Staff Dave MacLachlan, Chair
MTC	Gerry Webber
OTMPC Northern Office	Chris Milner Jim Grayston Claude Aumont Steve Bruno
FedNor	Jane Karhi Nancy Rossett
OTMPC	Liana Guiry
MNDM	Murray Morello
Rainbow Country	Donna McLeod
Algoma Country	Carol Caputo
Ontario's Near North	Pat Lagace
Northern of Superior Tourism Association	Tim Lukinuk
Ontario's Wilderness Region	Jamie Dallaire
Sunset Country	Gerry Cario
Tourism Sault Ste Marie	Ian McMillan
City of North Bay	Marla Tremblay
City of Sudbury	Rob Skelley Ian Wood
Tourism Thunder Bay	Paul Pepe
City of Timmins	Guy Lamarche
Town of Cochrane	Terry Vachon
Direction Ontario	Louise Lacroix
NOTO	Doug Reynolds
Ontario Parks	Lori Waldbrook
Town of Kenora	Heather Patterson
Northern Committee	Marg Watson, Sudbury Aviation

Organization	Name
13B Operator	Mike Morrow, Algoma Central Railway Betty McGie, Fish the Finest Al Errington, Errington's Wilderness Island Paul Smart, PK Resorts Cindy Lebrun, Tatnall Camp
13C Operator	Kevin Kalyta, Days Inn Doug Stanton, Fort William Historical Park Alan Cheeseman, Wilderness North Eric Lund, Esnagami Wilderness Lodge Tom Pearson, Camp Narrows Lodge
13A Operator	Angela Johnston, Westmont Hospitality Group - InnVest Reit Hotels Dorothy Cloet, Beaverland Camp JC Santos, WildExodus George Stivrins, Georgian Bay Cruise Company Katelyn Favretto, Capitol Centre

EXHIBIT THREE:
Tourism Operator Survey

Online Survey Results

1. Which categories best describe your tourism business?

	Response Percent	Response Count
Accommodation (Hotel, Motel, B&B, Housekeeping Cabins/Cottages)	48.4%	76
Resort	17.8%	28
Fishing & Hunting Camp	28.0%	44
Transportation	5.1%	8
Tour Operator	4.5%	7
	Answered Question	157
	Skipped Question	2

2. Where are you located?

	Response Percent	Response Count
North Western Ontario	24.4%	38
North Eastern Ontario	54.5%	85
North Central Ontario	21.2%	33
	Answered Question	156
	Skipped Question	3

3. What are the three biggest issues and challenges currently facing your business? (eg. government regulations, access to capital, access to skilled staff, negative economic environment, passport issue, high US dollar, other)

	Response Percent	Response Count
1.	100%	156
2.	93.6%	146
3.	80.1%	125
	Answered Question	156
	Skipped Question	3

Based on all responses provided, the top 10 issues emerge as follows:

1. Negative Economic Environment	63 responses
2. Government Regulations	53 responses

3. Gas Prices	40 responses
4. Access to Skilled Staff & Volunteers	36 responses
5. Low US Dollar/High CDN Dollar	34 responses
6. Lack of Marketing/Northern Brand	30 responses
7. Access to Capital & Other Funding	26 responses
8. Passport & Border Issues	20 responses
9. Hydro Costs	9 responses
10. High Taxes	9 responses

4. What do you see as your greatest business opportunity in the next 2-5 years?

	Response Percent	Response Count
Targeting New Markets	54.6%	77
Expanding My Business	27.7%	39
Offering New Products	22.0%	31
Utilizing Specific Marketing Techniques	22.7%	32
Other	15.6%	22
	Answered Question	141
	Skipped Question	18

Of those that specified target markets for this question, the responses included:

Southern Ontario	8 responses
Europe/Other International	8 responses
USA	7 responses
Local/Northern Cities	6 responses
Central/Eastern Ontario	5 responses
Other Provinces	4 responses

Of those that specified business capacity expansion, the responses included:

Building/Facilities/Infrastructure	27 responses
Fleet Expansion	3 responses
Staff Expansion	3 responses
Extend Season	2 responses

Of those that specified offering new products, the responses included:

Complementary Activities/Products	22 responses
Packaging	7 responses
Off Season Product	1 response

Of those that specified specific marketing techniques, the responses included:

Online/Mobile	8 responses
Social Marketing	6 responses
Website Development	6 responses
Marketing Partnerships	6 responses
E-marketing	1 response
Media Relations	1 response

5. When is the last time you made a significant capital investment in your business? (e.g. bricks and mortar expansion, renovation, investment in equipment or chattels)

	Response Percent	Response Count
Within the last six months	37.6%	59
Within the last year	27.4%	43
Within the last three years	20.4%	32
Five years ago or more	8.9%	14
N/A	5.7%	9
	Answered Question	157
	Skipped Question	2

6. Do you have any short term plans for the following?

	Yes	No	N/A	Response Count
Capacity Expansion	33.1% (45)	55.1% (75)	11.8% (16)	136
Adding new products to offering	60.7% (85)	31.4% (44)	7.9% (11)	140
Increasing marketing budget	44.9% (61)	52.2% (71)	2.9% (4)	136
Undertaking renovations	65.2% (92)	27.7% (39)	7.1% (10)	141
Large pruchase of new equipment/supplies	46.7% (64)	46.0% (63)	7.3% (10)	137
		Answered Question		153
		Skipped Question		6

7. In terms of the number of customers they represent, what are your top three geographic markets?

Count	Response Percent	Response
1.	100%	154
2.	96.8%	149
3.	86.4%	133
	Answered Question	154
	Skipped Question	5

Top responses by 1, 2, 3 ranking:

Rank 1	
1. Northern Ontario	57 responses
2. Southern Ontario (non-GTA)	32 responses
3. USA (led by Michigan)	17 responses

Rank 2	
1. USA (led by Ohio)	44 responses
2. Northern Ontario	43 responses
3. Southern Ontario (non-GTA)	18 responses

Rank 3	
1. Northern Ontario	42 responses
2. USA (led by Ohio)	39 responses
3. Southern Ontario (non-GTA)	9 responses

8. In terms of the yield (business revenue) they represent, what are your top three geographic markets?

Count	Response Percent	Response
1.	100%	142
2.	86.6%	123
3.	75.4%	107

Answered Question	142
Skipped Question	17

Top responses by 1, 2, 3 ranking:

Rank 1

1. Northern Ontario	55 responses
2. Southern Ontario (non-GTA)	32 responses
3. USA (led by Michigan)	18 responses

Rank 2

1. Northern Ontario	30 responses
2. USA (led by Ohio)	28 responses
3. Southern Ontario (non-GTA)	18 responses

Rank 3

1. USA (led by Ohio)	35 responses
2. Northern Ontario	28 responses
3. Southern Ontario (non-GTA)	12 responses

9. What is your annual marketing budget?

	Response Percent	Response Count
$0-$5,000	38.4%	58
$5,001-$10,000	21.9%	33
$10,001-$20,000	11.9%	18
$20,001-$40,000	11.3%	17
$40,001-$50,000	3.3%	5
$60,000+	13.2%	20
	Answered Question	151
	Skipped Question	8

10. What marketing tactics do you currently partake in on an annual basis?

	Response Percent	Response Count
Consumer Shows	42.3%	66
Website	95.5%	149
Print Advertising	91.0%	142
Broadcast Advertising	39.1%	61
Media Relations (fam trips, media releases)	39.1%	61
Social Media (Twitter, Facebook)	50.0%	78
E-newsletters or E-blasts	34.0%	53
Outdoor Advertising (billboards)	48.7%	76
Other		36
	Answered Question	156
	Skipped Question	3

11. What are the three most important sources of leads and new business for your business?

	Response Percent	Response Count
Word of Mouth (customer referrals)	89.8%	141
My Own Database/Repeat Business	54.1%	85
Media Coverage (online or print editorial)	21.7%	34
Paid Meida (print/broadcast advertising)	22.9%	36
Website	73.9%	116
Consumer Shows	12.7%	20
Social Media (Twitter, Facebook)	10.2%	16
Pay to Play Marketing Initiatives	3.8%	6
Commissionable Booking/Reservation Service	10.2%	16
Referral from another Website	14.0%	22
E-newsletters or E-blasts	5.7%	9
	Answered Question	157
	Skipped Question	2

12. Are you a member of a tourism organization?

	Response Percent	Response Count
No	17.3%	27
Yes	82.7%	129
	Answered Question	156
	Skipped Question	3

13. If you are a member of a tourism organization/association, please specify.

Of 126 responses, the top 10 responses are as follows:

1. Rainbow Country Tourism	25 responses
2. Algoma-Kinniwabe Tourism	16 responses
3. NOTO	16 responses
4. North of Superior Tourism Association	15 responses
5. Greater Sudbury Tourism Partnership	14 responses
6. Ontario's Wilderness Region	13 responses
7. Chamber of Commerce various	10 responses
8. Tourism Sault Ste. Marie	9 responses

9. Ontario's Near North	6 responses
10. Patricia Region Tourism & French River Resorts Association	each 5 responses

14. Do you participate in any "pay to play" marketing programs offered by a tourism organziation?

	Response Percent	Response Count
Yes	16.9%	26
No	83.1%	128
	Answered Question	154
	Skipped Question	5

15. If you do particpate in any "pay to play" programs, which do you find most valuable and what organization delivers the program (by tactic).

Answered Question	25
Skipped Question	134

Of the 25 answers, 11 responses pertained to tactic, as follows:

Print	4 responses
Online	4 responses
Packaging	2 responses
Contesting	1 response

Of the 25 responses, 13 indicated the organizations they participate with:

Tourism Sault Ste. Marie	3 responses
Rainbow Country Tourism Association	2 responses
Ontario Tourism Marketing Partnership	2 responses
Sudbury Tourism Partnership	1 response
Ontario Wilderness Region	1 response
Mattawa Voyager Country	1 response
Thunder Bay Tourism	1 response
Mackinaw Area Visitor Bureau	1 response
Algoma Central	1 response

16. If it was offered in your area, would you or your staff partake in a professional development opportunity to learn more about the following?

	Percent Response	Response Count
Packaging	35.9%	46
Customer Service	45.3%	58
Quality Standards	28.9%	37
Social Media	50.8%	65
Online Marketing	68.0%	87
Business Planning	28.1%	36
Accessing Capital	43.0%	55

EXHIBIT FOUR: Discovering Ontario Report – DMMO Reference Excerpts

2. Establish Regions

- 2.3 Equip DMMOs with the capacity to create and implement regional tourism strategies that include marketing and research; product development and packaging; setting investment attraction and infrastructure priorities; identifying training needs and priorities; and setting quality standards.

- 2.4 Encourage the DMMOs to develop partnerships and collaborate with municipalities, chambers of commerce and other local groups that support tourism.

3. Regularize Destination Marketing Fees

- 3.1 Organize and develop a regional DMMO in each tourism region in Ontario that would use Destination Marketing Fees (DMFs) for marketing the region in which the funds were generated. (See Recommendation 2 Sorbara Report).

- 3.3 Require formal votes in each region. If the majority of accommodation providers in the region support the adoption of a DMF, the fee would be mandatory for all. Participating DMMOs would be required to market within a provincial strategy.

- 3.4 Work with hotel and tourism associations to determine the appropriate governance structure of the DMMO. Legislation, if enacted, could establish the appropriate use, collection and accountability of the DMF.

8. Establish Service and Quality Standards

- 8.3 Coordinate with DMMOs to ensure the regional adoption of the quality strategy.

9. Develop the Tourism Workforce

- 9.2 Require regional DMMOs (see Recommendation 2 Sorbara Report) to work in partnership with the Ministry of Training, Colleges and Universities to address regional tourism labour shortages and training needs.

11. Actively Attract Investment

- 11.7 Each DMMO should identify its regional tourism investment priorities.

13. Transform Our Attractions

- 13.3 Ensure that public investments are aligned with priorities for tourism product development, infrastructure, festivals and events and investment attraction priorities. They should also be connected with regional objectives and targeted to specific regional needs identified by DMMOs (See Recommendation 2). This would allow provincially-owned attractions to play an even greater role in driving tourism.

15. Cultivate Festivals and Events

- 15.5 Work with DMMOs and municipal stakeholders and other partners to build a common approach to event appraisal.

16. Redesign Marketing Role

- 16.4 Create a provincial brand to be used by regional DMMOs (See Recommendation 2 Sorbara Report).

17. Market Strategically

- 17.9 Work closely with regional DMMOs to target the markets that make the most sense for each region (see Recommendation 2 Sorbara Report

18. Focus on Our Unique Products

a) Regional DMMOs should:

- 18.1 Identify high-potential unique tourism product in each region and develop regional strategies to coordinate programming around centerpiece attractions.

- 18.2 Package regional tourism experience and services for tourists (e.g., sporting events, hotels, restaurants).

- 18.3 Prioritize niche product opportunities with the highest potential to attract tourists (e.g., culinary, sports, eco-tourism) for future development (See Recommendation 2 Sorbara Report)

19. Improve Way Finding

- 19.3 Create a program to support DMMOs and their local municipalities (See Recommendation 2 Sorbara Report) to develop regional strategies for way-finding and signage. It should be consistent with other provincial initiatives (such as the TODS/Logo programs) and maximize the tourist experience. It should also coordinate spending within the region and leverage private sector and community investments.

20. Increase E-Marketing and Online Booking

- 20.5 Develop a regional online strategy within the provincial one, which helps consumers explore the regions and book online. This strategy should be developed by the DMMOs (see Recommendation 2 Sorbara Report)

EXHIBIT FIVE: Global Tourism, Tourism in Canada and Ontario

1.0 Global Tourism

Economic Contribution

According to the United Nations World Tourism Organization (UNWTO), over the past six decades, tourism has experienced continued expansion and diversification to become one of the largest and fastest growing economic sectors in the world. Many new destinations have emerged alongside the traditional ones of Europe and North America.

Inbound tourism has become one of the major trade categories. The overall export income generated by inbound tourism, including passengers transport, exceeded US$ 1 trillion in 2009, or close to US$ 3 billion a day. Tourism exports account for as much as 30% of the world's exports of commercial services and 6% of overall exports of goods and services. Globally, as an export category, tourism ranks fourth after fuels, chemicals and automotive products. The contribution of tourism to economic activity worldwide is estimated at some 5%. Tourism's contribution to employment tends to be slightly higher relatively and is estimated in the order of 6-7% of the overall number of jobs worldwide (direct and indirect).

Growth Trends

Under the impact of the worldwide financial crisis and following economic recession, international tourist arrivals and international tourism receipts declined in 2009; however, growth returned to international tourism in the last quarter of 2009 after 14 months of decline. (source: UNWTO Tourism Highlights 2010). According to the August 2010 Interim Update of the *UNWTO World Tourism Barometer,* worldwide international tourist arrivals increased by 7% between January and June 2010 compared to the very depressed levels of the same period of 2009, thus continuing the recovery trend that started in the last quarter of 2009. It is anticipated that in the second half of the year the rate of growth is likely to slow. For the full year 2010 UNWTO projects a growth in international tourist arrivals of between 3% and 4%.

Overall Tourism Outlook

Looking at longer term trends, international tourist arrivals have shown virtually uninterrupted growth in spite of occasional shocks. Arrivals grew from 25 million in 1950, to 277 million in 1980, to 438 million in 1990, to 681 million in 2000, and to the current 880 million. The dismal results of 2009 followed four years of strong, above trend growth. Including 2009, average annual growth since 2000 has been 3%. By 2020 international arrivals are expected to reach 1.6 billion (*UNWTO Tourism Highlights 2010*).

Tourism Outlook – Tourist Arrivals by Region

UNWTO´s Tourism 2020 Vision projects that international arrivals are expected to reach nearly 1.6 billion by the year 2020. Of these worldwide arrivals in 2020, 1.2 billion will be intraregional and 0.4 billion will be long-haul travelers.

East Asia and the Pacific, South Asia, the Middle East and Africa are forecast to grow at over 5% per year, compared to the world average of 4.1%. More mature regions like Europe and the Americas are anticipated to show lower-than-average growth rates. Europe will maintain the highest share of world arrivals, although this share will decline. Total tourist arrivals by region shows that, by 2020, the top three receiving regions will be Europe (717 million tourists), East Asia (397 million) and the Americas (282 million), followed by Africa, the Middle East and South Asia.

International Tourist Arrivals by region (million)

	Share (%) 1995	Forecasts 2010	2020	Average annual growth rate (%) 1995-2010	Share (%) 2010	2020
Total	**565**	**1,006**	**1,561**	**4.1**	**100**	**100**
Africa	20	47	77	5.5	3.6	5.0
Americas	109	190	282	3.9	19.3	18.1
East Asia/Pacific	81	195	397	6.5	14.4	25.4
Europe	338	527	717	3.0	59.8	45.9
Middle East	12	36	69	7.1	2.2	4.4
South Asia	4	11	19	6.2	0.7	1.2
Intraregionl (a)	464	791	1,183	3.8	82.1	75.8
Long-haul	101	216	378	5.4	17.9	24.2

Source: UNWTO Tourism Highlights 2010

2.0 Tourism In Canada

The Canadian Tourism Commission (CTC) reports that in 2009 visitors spent $11.5 billion during their stay in Canada, spending on average $738 per trip. Total tourism Gross Domestic Product (GDP) reached $29.0 billion, or 2.0% of Canada's GDP, while employment attributable to tourism spending reached 649,900 jobs, for a decrease of 2.0% over the previous year. The country's international travel account deficit stood at $12.2 billion in 2009, a moderate 3.2% improvement over 2008 (CTC's Tourism Snapshot: 2009 Year-in-review; Facts & Figures, 4th Edition)

Canada within the Global Context

According to the UNWTO (Tourism Highlights 2010), international tourist arrivals to Canada were down 8% in 2009 over 2008, which correlated with a decrease in international tourism receipts. At the same time Canada overtook the US to move from ninth to fifth place in The World Economic Forum's ranking of destinations in *The Travel & Tourism Competitiveness Report 2009*. According to the report, Canada's high ranking is the result of "excellent" natural and cultural resources, the world's top-ranked air infrastructure system and the business community's consensus that the Canadian government is making a concerted effort to promote tourism overseas (CTC news article - http://mediacentre.canada.travel/wef_ranking, Full Report, The Travel & Tourism Competitiveness Report 2011, World Travel & Tourism Council).

Recent Gains

In 2009, international visitors made 15.6 million trips to Canada, down 22% compared with Canada's peak in international arrivals in 2002. International visitors over the age of 45 made 8.5 million of these trips, representing Canada's largest visitor age group (CTC's Tourism Snapshot: 2009 Year-in-review; Facts & Figures, 4th Edition).
By 2010, international visitor trips to Canada had increased to 16.1 million, a 2.3% increase. By 2010, with the exception of Mexico, all CTC target markets posted gains. In 2010, Brazil and China were the top performers, posting increases in overnight arrivals of 29.7% and 21.2% respectively over 2009. Trips from the Americas markets (the US and Mexico) edged up by a very modest 0.2%, reaching 11.9 million, with both countries posting consecutive growth in overnight arrivals to Canada for the last three months of 2010. In 2010, international trips by key markets exceeded CTC's set targets by +1.5%. (CTC's Tourism Snapshot: *A focus on the markets that the CTC and its partners are active in; December 2010, Volume 6, Issue 12).*

3.0 Tourism In Ontario

Economic Impact

In 2007, visitor spending in Ontario totaled $22.1 Billion, or 3.8% of provincial GDP, while tourism employment totaled 200,900 jobs and 3% of total provincial employment. Tourism labour income is estimated at $7 Billion or 2.2% of provincial labour income. Tourism's foreign earnings are $6.1 Billion, or 3% of Ontario's total international exports. Tourism ranks 8th as an Ontario export. (*Economic Impact – Quick Facts, 2007)*

Current Levels and Outlook

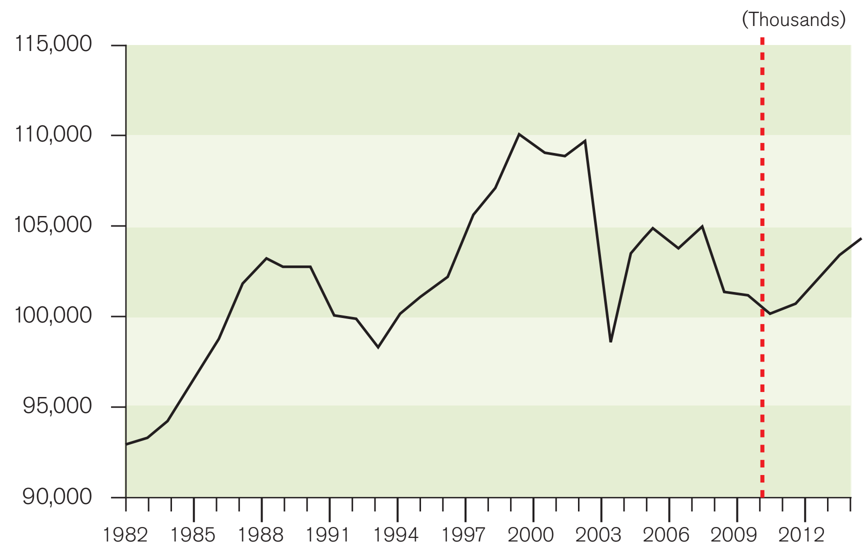
In 2009, there were 100 million visitors to Ontario. Within Canada, Ontario ranks first in international visits (including visits from the US), and second in visitor spending (British Columbia ranks first). (CTC Travel Characteristics Q2, 2010, International Visits). Top overseas inbound tourist visits included the UK with 300,000 visits, followed by France with 100,000 visits and Germany with approximately 80,000 visits.

According to the Ontario Tourism Outlook Spring 2010 (Ontario Ministry of Tourism and Culture), in terms of total tourism, inbound non-business visits were expected to decline in 2010, followed by increases in future years:

Total Tourism Visits Trend

Tourism visits will continue their downward trend from 2009, decreasing 0.8% in 2010, and will rebound 0.5% in 2011. Visits will then increase at an average annual rate of 1.2% for the rest of the forecast period.

Total tourism visits will reach pre-recession (2007) levels by 2014, reaching more than 104 million visits.



Source: The Ontario Tourism Outlook Spring 2010 (Ontario Ministry of Tourism and Culture)

Ontario's tourism outlook for 2010 through 2014 demonstrates that growth rates are expected to increase marginally over the next few years. Domestic visits are expected to move into positive growth territory by 2011, while US border state visitation will take a little longer to see any increase:

Tourism Outlook Summary

Source	Market share in 2010 (%)	2010 Growth Rates (%) over 2009	2011 Growth Rates (%) over 2010	2010/2014 Growth Rates (%)
Total Visits		-0.8	0.5	4.2
Domestic Visits		-0.2	0.5	3.7
Ontario	95.0	-0.1	0.4	3.5
Canada	5.0	-1.2	2.3	8.6
International Visits		-5.1	0.4	7.5
U.S. Border States	67.0	-6.5	-0.8	4.9
U.S. Non-Border States	18.0	-5.5	1.7	11.8
UK	2.6	-0.1	3.0	10.1
France	1.0	0.9	2.6	14.5
Germany	0.9	0.7	2.2	10.0
Japan	0.8	-7.2	-1.3	13.7
Other Overseas	10.0	2.9	5.4	14.3

Source: Ontario Ministry of Tourism and Culture.

Sources of Tourism Receipts

Visitor origin/share of market breaks down as follows:

- Ontario's domestic market is a competitive jurisdiction for non-business visits, with its market share forecast to increase from 69% in 2001 to around 84% by 2012.
- Since 2005, Ontario's US market share dropped below 20%. The trend is forecast to continue with the US market share reaching around 10% by 2012.
- The share of visits from other provinces will keep steady above 4% in the next five years.
- Overseas markets will have their shares increase from 1.7% to 2.0% by the end of 2012.
- The UK is forecasted to grow by 3% in 2011, 3.4% in 2012; France: 100,000 visits, forecasted to grow 1.1% in 2010, 2.5% in 2011 and 3.4% 2012-2014; Germany: approx. 80,000 visits, forecasted to grow 1% in 2010 and grow 2% each year 2011 to 2014; Japan: approx. 75,000, forecasted to decline 8.3%in 2010 (likely more due to earthquake/tsunami 2010 – prior to events, was expected to grow after 2012).
- Emerging markets with increases tourist visits forecasted include: China, Mexico & India.

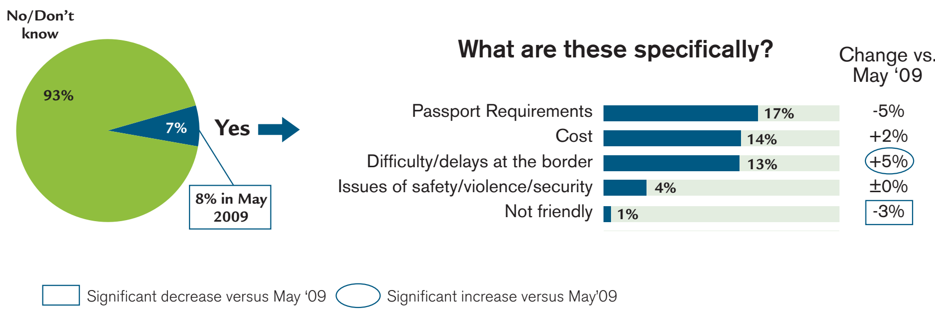
Travel Intentions

Results of recent Travel Intentions Surveys (Ontario Ministry of Tourism, May 2010, Summer/Fall) indicate significant implications for Ontario's tourism marketing strategy going forward, namely:

- Retaining domestic support is a key immediate priority:
  - Particularly given the draw of out-of-province (US) destinations
  - Leverage breadth of unique and different experience in-province
  - Underscore perceptions of value – quality of experience, convenience, packaged "deals"
- Begin thinking about appropriate reinvestment in Near Markets:
  - Travel document non-compliance limits opportunity
  - Border-crossing reticence must be overcome
  - Remind travelers in these markets about the Ontario travel experience they have enjoyed in the past
  - Broaden their scope re: Ontario's full offer
- Continue to invest strategically in the US Mid Markets:
  - Target segments (more so than in Near)
  - Look for intersection of high value segments, desired experiences and Ontario's product strengths
  - Focus narrowly on geography to optimize investment
  - Need to highlight Ontario experiences that are both meaningful AND distinctive
- Quebec offers better conditions than it has for some time:
  - Focus on quick cross-border and iconic wins
  - Differentiation from Quebec's own product is critical (culture & environment)
  - Connections to Quebec are also relevant
  - Send welcoming signals (Quebec spokesperson has been highly effective in the past)

- With Americans, passport requirement declined as a concern, however concerns of difficulty/delays at the border increased:

Percent of **Americans** aware of Ontario



Q21A. You may have already mentioned this, but apart from your own personal circumstances or your general interest in Ontaio, are there any specific events or issues that you have heard about that make you (less inclined to travel to/at all concerned about traveling to) Toronto, Niagara Falls, or other places in Ontario?

Z21B What are these issues specifically

EXHIBIT SIX:
Environmental Scan and Tourism Operating Environment

(Source: OTMPC Marketing Plan Environmental Scan)

Economic Environment

According to the OTMPC Marketing Plan Environmental Scan, 2009 was characterized by the global economic downturn, growing unemployment, the credit crunch and falling real estate prices in the U.S. While most countries turned the corner and started showing economic growth in the second half of 2009 into 2010, the recession had its impact on consumer behaviour. In the last several years, household debt-to-income ratios have increased in many developed countries. With the recession hitting at the end of 2008 and into 2009, consumers increased their saving rates in most developed countries, including the U.S. and Canada, while they curtailed their spending. Real consumption is forecast to pick up slowly in Canada and the U.S. in 2010, but in most of the developed countries in Europe, including the U.K., Germany and France, further declines in consumer spending are expected.1 Unemployment in most developed countries is forecast to remain high in 2010.

The economic conditions have contributed to falling consumer confidence in the U.S. again in the third quarter of 2010. Recovery of Canada's resource-based economy seemed to be faster than that of the U.S. The stability of our financial system and the strong housing market in the first half of 2010 boosted consumer confidence here. However, by the third quarter of 2010, consumer confidence was declining in Canada as well, and Ontario observed one of the steepest declines among the provinces. The strongest economic growth globally is forecast in some emerging markets. Strong economic performance in Brazil, Russia, India and China is resulting in the emergence of a populous middle class in these countries with money and a keen interest in travel.

Travel Behaviour

Economic conditions affected travel behaviour as well. While consumers seem to be unwilling to give up on travel, they are spending less by taking fewer trips, travelling to close-by destinations, taking shorter trips and cutting back on restaurant, accommodation and recreational spending. It remains to be seen how lasting this change in travel behaviour will be.

OTMPC's forecast indicates that travel from within the domestic market will grow 1% to 2% annually between 2010 and 2013. Travel from the U.S. to Ontario is forecast to decline further in 2010 and 2011, entering positive territory in 2012. Overseas markets are forecast to achieve about 5% annual growth. Growth in Ontario's largest overseas market, the UK, is forecast to be

slower at 1% in the next couple of years, while Japan, China and India are expected to grow at a much stronger rate, some exceeding 10% per year. Consumers staying closer to home when travelling meant that the domestic market carried our tourism industry in the last couple of years, as Ontario experienced a major decline in U.S. visitation. Among its own residents, Ontario has high top-of-mind awareness – above 60% – and high interest to travel in Ontario --above 80%. However, in the current economic climate, consumers are increasingly value conscious and price sensitive, needing new and compelling reasons to convert interest into travel. There is a need to differentiate and to be associated with unique and new experiences to overcome the "been there, done that" attitude of Ontario residents.

Outside of Ontario, Quebec is Ontario's largest domestic market, accounting for 4% of domestic visitation. Quebec is an insular market, in which Ontario is perceived as reasonably appealing and safe, but undistinguished. Throughout the last 3-4 years, the province's advertising efforts contributed to an increased top-of-mind awareness of Ontario among Montreal residents. Building a strong Ontario brand in this market will increase the appeal of our province and help tap into this short-haul market.

In addition to the economic conditions in the U.S., visitation to Ontario was also negatively affected by a weak U.S. dollar and the introduction of the passport requirement. Ontario faces stiff competition in U.S. Near and Mid Markets as American travellers favour their own domestic destinations (NYC, New England) to escape border hassles.

In the Near Markets, despite the continued lack of direct advertising support, Ontario's standing as a short trip destination has been stable in the last couple of years, though at a lower level than what was observed prior to the recession and the weakening of the U.S. dollar.

In Mid Markets, Ontario continues to have little profile as a potential destination and there is very low knowledge of Ontario as a travel destination. Consumers need to be educated on what Ontario has to offer with continued marketing communication to get on their consideration list.

Overseas markets represent a small proportion of Ontario visitation, but they are high-yield markets as visitors from these countries stay longer and try to absorb as much as they can during their stay. With the emergence of new, lesser-known, lesser frequented international destinations and the relative affordability of air transportation to these locations, there is increased competition in our source markets. Once again, differentiating Ontario with a strong brand will be key to attracting visitors to the province.

Traditional markets such as the U.K., Germany, France and Japan will still provide a large proportion of overseas visitation however growth is expected to come from markets such as China and India as the emergence of the new middle class in these countries creates purchasing power. In June 2010, Canada received Approved Destination Status from China (ADS), which allows Ontario to market there. Tapping into new source markets requires understanding the different needs and interests of travellers as well as understanding cultural differences when serving these travellers at the destination.

Social and Cultural Environment

Demographic changes also affect travel to Ontario. Ontario's population is getting older. Though the empty-nester baby boomer generation has more money and time to travel than previous generations, keeping them in Ontario is a challenge. With the many available choices, they travel extensively to international destinations. Ontario's best bet is to offer them competitive tourism experiences for short getaways.

Many of Canada's new immigrants settle in Toronto. It is estimated that by 2026, 50% of Toronto's population will be new Canadians. For many new immigrants, their language preference continues to be their mother tongue, including for media consumption. Though they tend to travel to their homeland, getting to know their new surroundings provides an opportunity for Ontario tourism. Related to immigration is increasing ethnic diversity. To serve these ethnic markets, tourism offerings need to be tailored to different cultural backgrounds and travel interests.

Global warming and high gas prices have also brought sustainable and green tourism to the forefront. Consumers are increasingly conscious of the impact they have on the environment and tourism is not an exception. Heightened awareness of environmental issues might change consumer expectations and result in additional pressures on tourism suppliers. However, it remains to be seen how much cost increase the consumer is willing to take on to satisfy these expectations. This is an emerging trend that requires careful monitoring on the part of the tourism industry both in terms of development and positioning opportunities, as well as consumers' price sensitivity.

Cheaper and convenient air travel made it possible for consumers to broaden their horizon, and travel to more distant destinations in recent years. The importance of air access cannot be underestimated and has contributed to the challenges faced by Canada and Ontario. Cost of air travel to and within Canada is relatively high, creating a price disadvantage for international travellers.

EXHIBIT SEVEN:
Additional Tourism Organizations Operating in Northern Ontario

Organization	Brand / Tagline and Website	Product / Market Focus
Atikokan	Experience Atikokan - the "Canoeing Capital of Canada" http://www.atikokaninfo.com	Canoeing, resorts, lodges, camps and outfitters
Morson Tourism Association	Morson – Island Splendour, Feel It! http://www.lakeofthewoodstourism.ca	Anglers, naturalists, bird watchers, boaters, campers, photographers and others who come to enjoy the fantastic shore lunches and the swimming, hiking and golf
Kenora Tourism	Kenora, Lake of the Woods http://www.visitkenora.ca/portal/tourism/index	Outdoor adventure, fishing, hunting, water sports, winter sports, snowmobiling, unique festivals, international sport tournaments, or simply a relaxing getaway on the lake with all the comforts of a city dedicated to hospitality. Kenora has traditionally had a strong complement of visitors from the mid-western United States and Province of Manitoba. This has been changing and expanding in the past 15 years to also include an increasing domestic market from western Canada, and an increase in summer residents.

Patricia Region	Patricia, Canada's Heartland Region http://www.freemap.ca/index.php	Member lodges, camps, resorts, and outfitters primarily offer fishing and hunting vacations, however many are attempting to shift some of their marketing to "eco tourism". The primary catchment area for potential tourists is the states of the upper Midwestern USA: Minnesota, Wisconsin, Iowa, Illinois, Missouri and Indiana.
Red Lake Touring Region	Where Spirits Soar http://www.visitredlakeregion.com/	Wilderness experiences – primarily fishing and hunting. Canoeing & kayaking, golfing, water sports, hiking, and winter sports.
Georgian Bay Country	Escape, Explore & Enjoy! http://www.gbcountry.com/	Recreational waterways, and natural attractions; resorts, cabins, and campgrounds. Increasing tourism visitation from Southern Ontario and Northeastern United States (Michigan, Ohio, New York and Pennsylvania).
Manitoulin Tourism Association	Experience Manitoulin Island, Lake Huron's Greatest Treasure http://www.manitoulintourism.com/	Outdoor activities like hunting, fishing, hiking, cycling and history - many museums.

EXHIBIT EIGHT:
Northern Tourism Organization Membership Breakdown

	Algoma Country	Rainbow Country	Ontario's Near North	Ontario's Sunset Country	North of Superior Tourism Association	Ontario's Wilderness Region
Total Members	176	161	106	385	110	114
Accommodations (%)	62.5	50	38	62 (of which 38% are fly in fishing outposts)	50	54
Restaurants (%)	0	11	0	0	1	0
Town/Municipality (%)	8.5	2.5	20	9	5	22
Businesses & Associations (inc. retail) (%)	20	14	38	28	23	3.5
Events (%)	0.5	0.5	0	0	3	0
Attractions, Museums & Recreation (%)	8.5	17	4	0	17	17.5
Golf Courses (%)	0	5	0	0	1	3

EXHIBIT NINE:
Ontario's True North -Website Portal Content Contributors

The following organizations will provide content for various areas of the website portal. C = Provides Content

SITE SECTION	PAGES	RTO 13	RTO 13A	RTO 13B	RTO 13C	OTMPC NORTHERN OFFICE
HOME	HOME	C	–	–	–	C
ABOUT	all ABOUT pages	C	–	–	–	–
PLACES	James Bay/Manitoulin/Sudbury	–	C	–	–	–
PLACES	Agawa/Algoma/Saulte Ste. Marie	–	–	C	–	–
PLACES	Sunset Country/Superior Coast/ Thunder Bay	–	–	–	C	–
EXPERIENCES	Fishing	–	C	C	C	C
EXPERIENCES	Hunting	–	C	C	C	C
EXPERIENCES	Motorsports	–	C	C	C	C
EXPERIENCES	Outdoor Adventure	–	C	C	C	C
EXPERIENCES	Touring Routes	–	C	C	C	–
EXPERIENCES	Nature Viewing	–	C	C	C	–
EXPERIENCES	Culture & Heritage	–	C	C	C	–
FEATURES	Initiative Specific as required	–	C	C	C	–
PLAN YOUR TRIP	Maps	C	–	–	–	–
PLAN YOUR TRIP	Travel Planner Tool	C	–	–	–	–
PLAN YOUR TRIP	Sample Itineraries	C	C	C	C	–
PLAN YOUR TRIP	Operator Listings/Packages	–	C	C	C	–
PLAN YOUR TRIP	Events Calendar	–	C	C	C	–
PLAN YOUR TRIP	Transportation	C	–	–	–	–
PLAN YOUR TRIP	Visitor Information	C	–	–	–	–
PLAN YOUR TRIP	Brochures and Guides	C	C	C	C	–
EXPLORE	all EXPLORE pages	–	C	C	C	C
SECONDARY PGS	all SECONDARY pages	C	–	–	–	–

EXHIBIT TEN:
Northern Ontario Social Media Strategy

Social Media Channels

Social Media Channel categories to be considered for inclusion in Social Media Plans include:

Social Networks (Facebook, LinkedIn, MySpace)
Blogs (Wordpress, Typepad, Blogger, Tumblr)
Microblogs (Twitter)
Content Sharing (YouTube, Vimeo, Flickr, Slideshare)
Social Bookmarking (Facebook Like, Digg, Reddit, StumbleUpon, Delicious)
Location/Geolocation Services (Foursquare, Gowalla, Facebook Places, Loopt)

RTO 13

- utilize the channels that best fit and align with specific marketing objectives (eg. brand/product awareness for Northern Ontario places and experiences, lead generation, community building, customer care, etc) and best reach the audiences that RTO 13 wants to 'talk to'
- RTO 13 (staff/vendors) manages these 'best bet' 'umbrella' social media channels with content focus on Northern Ontario 'Places' and 'Experiences'

Facebook - brand awareness, customer care, lead generation, community building

Twitter - brand awareness, customer care, lead generation, community building

Blog(s) (website integrated) - brand awareness, lead generation, community building

YouTube - brand awareness, lead generation, community building

Flickr - brand awareness, community building

OTMPC Northern Office

- utilize the channels that best fit and align with specific marketing objectives (eg. brand/product awareness for Northern Ontario avid products/experiences (as positioned via Canada's Great Outdoors) lead generation, community building, etc) and best reach Canada's Great Outdoors target audiences and markets
- OTMPC Northern (staff/vendors) manages these 'best bet' 'umbrella' social media channels with content focus on specific 'Experiences' - namely: fishing, hunting, motor sports, soft outdoor adventure - (Canada's Great Outdoors product focus)

Facebook - brand awareness, customer care, lead generation, community building

Twitter - brand awareness, customer care, lead generation, community building

Blog(s) (website integrated) - brand awareness, lead generation, community building

YouTube - brand awareness, lead generation, community building
Flickr - brand awareness, community building

Contribution to RTO 13

RTO 13 manages Social Media channels related to overall destination marketing (would include current Northern Ontario Tourism/Travel Facebook page(s) now being managed by OTMPC Northern Office).

RTO 13 (staff/vendor) creates, captures, and organizes content from a variety of sources related to Northern Ontario 'Places' and 'Experiences' to support the overarching marketing strategies of RTO 13 from the following sources:

RTO 13A, 13B, 13C

- do not manage any Social Media channels
- content contributed to RTO 13: specific sub-retional marketing initiatives/ campaigns provide content for 'Ontario's True North' Social Media Plans (repurposed content, unpaid)
- link/post/share content to FB, Twitter, Blog, YouTube, Flickr

OTMPC Northern Office/OTMPC

- maintain Social Media channels specific to product experiences for avids: 'Go Ride', 'Go Hunt', 'Go Fish', soft outdoor adventure
- content contributed to RTO 13: repurpose content from OTMPC Northern Office Social Media channels (repurposed content, unpaid)
- link/post/share content to FB, Twitter, Blog, YouTube, Flickr

NORTAS, Cities and DMOs

- each mange their own Social Media channels as dictated by their individual marketing strategies
- content contributed to RTO 13: photos, videos, recommendations, tips, insider information, local ambassadors/enthusiasts/spokespeople, custom blog content, etc. (user generated content, unpaid)
- link/post/share content to FB, Twitter, Blog, YouTube, Flickr

Industry Partners/Associations (eg. OFSC, OFATV, MCC, OFAH, etc.)

- content contributed to RTO 13: blog content, recommendations, tips, insider information, photos, videos, etc. (repurposed content, paid and unpaid content)
- link/post/share content to FB, Twitter, Blog, YouTube, Flickr

Media/Bloggers

- content contributed to RTO 13: capture media mentions, stories, articles, reviews, recommendations, photos, videos, etc. (repurposed content, unpaid)
- link/post/share content to FB, Twitter, YouTube, Flickr

Tourism Operators

- content contributed to RTO 13: special offers/packages, photos, videos, etc. (repurposed content, unpaid)
- link/post/share content to FB, Twitter, Blog, YouTube, Flickr

Visitors

- content contributed to RTO 13: photos, videos, recommendations, experiences etc. (user generated content, unpaid)
- link/post/share content to FB, Twitter, Blog, YouTube, Flickr

Contribution To OTMPC Northern Office

OTMPC Northern Office manages social media channels specific to product experiences for avids:

'Go Ride', 'Go Hunt', 'Go Fish' and soft outdoor adventure that support the marketing objectives/brand of Canada's Great Outdoors.

OTMPC Northern Office (staff/vendors) creates, captures, and organizes content on these avid product 'Experiences' from the following sources:

Industry Partners/Associations (eg. OFSC, OFATV, MCC, OFAH, etc.)

- content contributed to OTMPC Northern Office: blog content, recommendations, tips, insider information, photos, videos, etc. (repurposed content, paid and unpaid content)
- link/post/share content to FB, Twitter, Blog, YouTube, Flickr

Corporate Partners And Celebrity Experts

- content contributed to OTMPC Northern Office: blog content, reviews, endorsements, recommendations, photos, videos, etc. (repurposed content, paid and unpaid content)
- link/post/share content to FB, Twitter, Blog, YouTube, Flickr

Media/Bloggers

- content contributed to OTMPC Northern Office: capture media mentions, stories, articles, reviews, recommendations, photos, videos, etc. (repurposed content, unpaid)

- link/post/share content to FB, Twitter, YouTube, Flickr

Visitors

- content contributed to OTMPC Northern Office: photos, videos, recommendations, experiences etc. (user generated content, unpaid)
- link/post/share content to FB, Twitter, Blog, YouTube, Flickr

EXHIBIT ELEVEN:
Analysis of RTO Sub-regional Management Scenarios

The advantages and disadvantages of each scenario are summarized below:

Management Scenario	Advantages	Disadvantages
A contracted manager is hired in each sub-region to work with a marketing committee/task force on planning and implementation of sub-regional initiatives. This manager would report to RTO 13.	Additional human resources to take on significant tasks required (procurement, coordination, liaison with suppliers, planning, on going communication). Staff can be hired based on the specific skill sets required. Efforts will be solely focused on the RTO on a full time basis. Staff member will not have a "dual agenda". Could work well in 13C where a manager could address the very different product focus between the Northern and more southerly portions of the region.	Potentially represents an increase in administrative costs, though likely to represent acceptable costs for MTC. Perceived by many as adding "another layer", and therefore duplication to the tourism marketing landscape. May be problematic in 13A where there are fewer highly resourced organizations for a staff member to work alongside. May represent some duplication in 13B where there is a single city and single region.

Amongst existing organizations or via amalgamation of existing organizations, a single lead organization is appointed in each sub-region to work alongside a marketing committee/task force on planning and implementation.	Less risk of adding " another layer", and therefore duplication to the tourism marketing landscape? Likely the least expensive administrative option. Leverages existing skills and experience within Northern Ontario industry. Could work well in 13A where existing organizations that are struggling with resource issues might come together to create a single lead organization.	Organizations not appointed may not elect to work cooperatively with the lead. Lead organization may be unable to solely focus on RTO and significant tasks required given if required to continue existing organizational tasks. Organization may have a "dual agenda". "Procurement" or appointment of this lead organization must fit within MTC guidelines which may be a challenge. Could be problematic in 13B where there are only two tourism organizations. Could be problematic in 13C where there may not be an organization prepared to take on this role, or an organization with capacity to address very different products across the sub-region.
Two lead organizations, one city and one regional organization, act as co-leads while working with a marketing committee/task force on planning and implementation.	Sharing responsibilities and tasks makes significant workload more practical. Ensures a balance of rural and urban perspectives and focus.	Many sub-regions have issues with the cities and regions working together harmoniously. If fee for service is paid, could increase administrative costs; for this reason MTC is not entirely encouraging of this scenario. Sharing of responsibilities may be logistically difficult. Organizations may have "dual agendas".

A combination of the above structures is used, tailoring the structure differently for each sub-region based on its unique strengths and challenges.	In the case of each scenario, there is at least one sub-region for whom the scenario is not ideal, due to available skill sets, unwillingness to work with the RTO or personality issues.	This may result in a solution that works in the current context of existing organizations, skill sets, and individuals, but long term may not provide a stable solution across the board for RTO 13.

EXHIBIT TWELVE:
Tourism Organizations and the Northern Ontario Budget

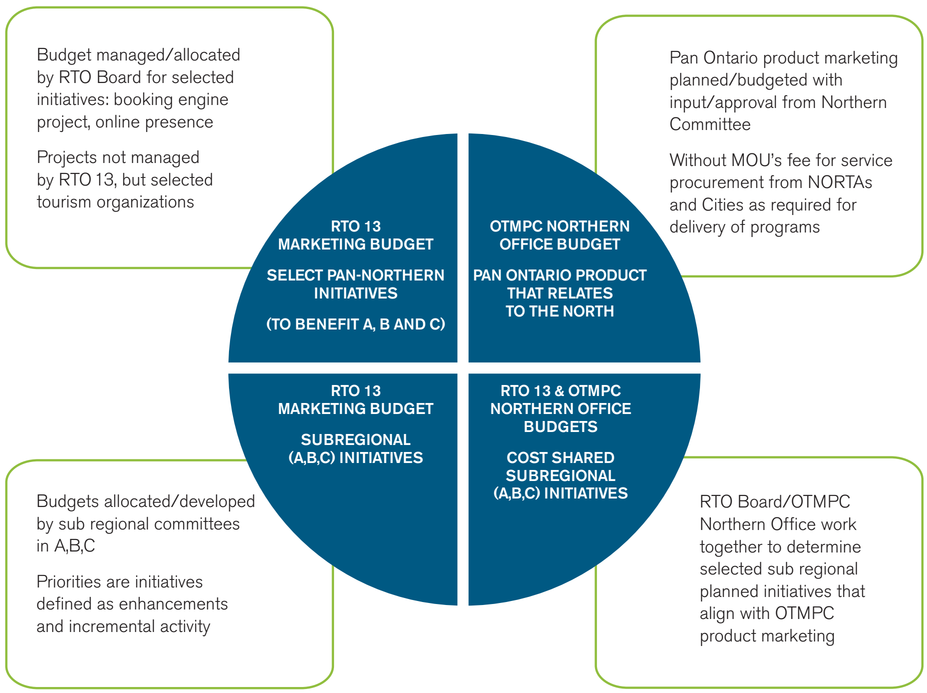


EXHIBIT THIRTEEN:
Northern Ontario Tourism Marketing Efforts, Planning and Budgets

Marketing Activity	Which Budget?	Who Develops and Plans?	Who Implements?
Pan-Ontario product marketing, especially in new markets, benefitting the North	OTMPC Northern Office	OTMPC Northern Office in consultation with OTMPC and Northern Committee	OTMPC Northern Office staff Outside suppliers (e.g. AOR) Northern tourism organizations procured by OTMPC
Pan-Northern media relations activities	OTMPC Northern Office	OTMPC Northern Office in consultation with OTMPC and Northern Committee	OTMPC Northern Office staff with assistance from OTMPC Outside suppliers (e.g. media relations firm) Northern tourism organizations procured by OTMPC (assisting with coordinating fams, presenting opportunities to operators, etc.)
Pan-Northern private sector partnerships	OTMPC Northern Office	OTMPC Northern Office in consultation with OTMPC and Northern Committee	OTMPC Northern Office staff Outside suppliers (e.g. AOR)
Northern Ontario web portal (enhanced)	RTO 13 and OTMPC Northern Office share annual management cost RTO 13 bears cost of redevelopment/ enhancements RTO 13 procures sub-regional content from sub-regions OTMPC Northern Office budget covers content acquisition for pan-Ontario products and content from celebrity bloggers, media, and spokespeople	RTO 13 Board and Staff in partnership with OTMPC Northern Office	RTO 13 Board and Staff and OTMPC Northern Office in conjunction with outside suppliers as appropriate (e.g. AOR). Sub-regions provide content as appropriate.

Pan-Northern marketing activities (limited to tactics such as online booking engine, lure publication, social media plan)	RTO 13	RTO 13 Board and Staff	Managed either by a chosen sub-region, by outside suppliers, or a combination of both as appropriate (e.g. AOR)
Sub Regional marketing (A, B, C) (including marketing tactics that reflect best bet current markets, best bet destinations and best bet products, and that enhance or augment more localized tourism marketing by various existing tourism organizations)	RTO 13 via a sub-regional allocation; and in some instances, RTO 13 and Northern Office in partnership	A, B and C sub-regional Committees, led by two sub-regional lead organizations	Sub-regional lead organizations will execute or outsource to AOR as appropriate Sub-regional lead organizations will work with OTMPC Northern office as appropriate on cost-shared initiatives
Specific destination marketing within sub-region	NORTAs, cities, and other tourism offices and associations' own budgets	NORTAs, cities, and other tourism offices and associations' own plans	Each NORTA, city or other tourism office
In-market visitor servicing	NORTAs, cities, and other tourism offices and associations' own budgets Enhanced by RTO 13 if gaps exist, potentially via fee for service or staff	NORTAs, cities, and other tourism offices and associations	NORTAs, cities, and other tourism offices and associations plus additional staff if required at sub regional level
Operator liaison for marketing opportu-nities	RTO 13 (via sub-regional management agreements); NORTAs, cities, and other tourism offices' own budgets	Sub-regions, NORTAs, cities, and other tourism offices and associations	Sub-regional lead organizations, NORTAs, cities, and other tourism offices and associations