



DESTINATION
**NORTHERN
ONTARIO**



2024-25

Business Plan

Ontario 

destinationnorthernontario.ca

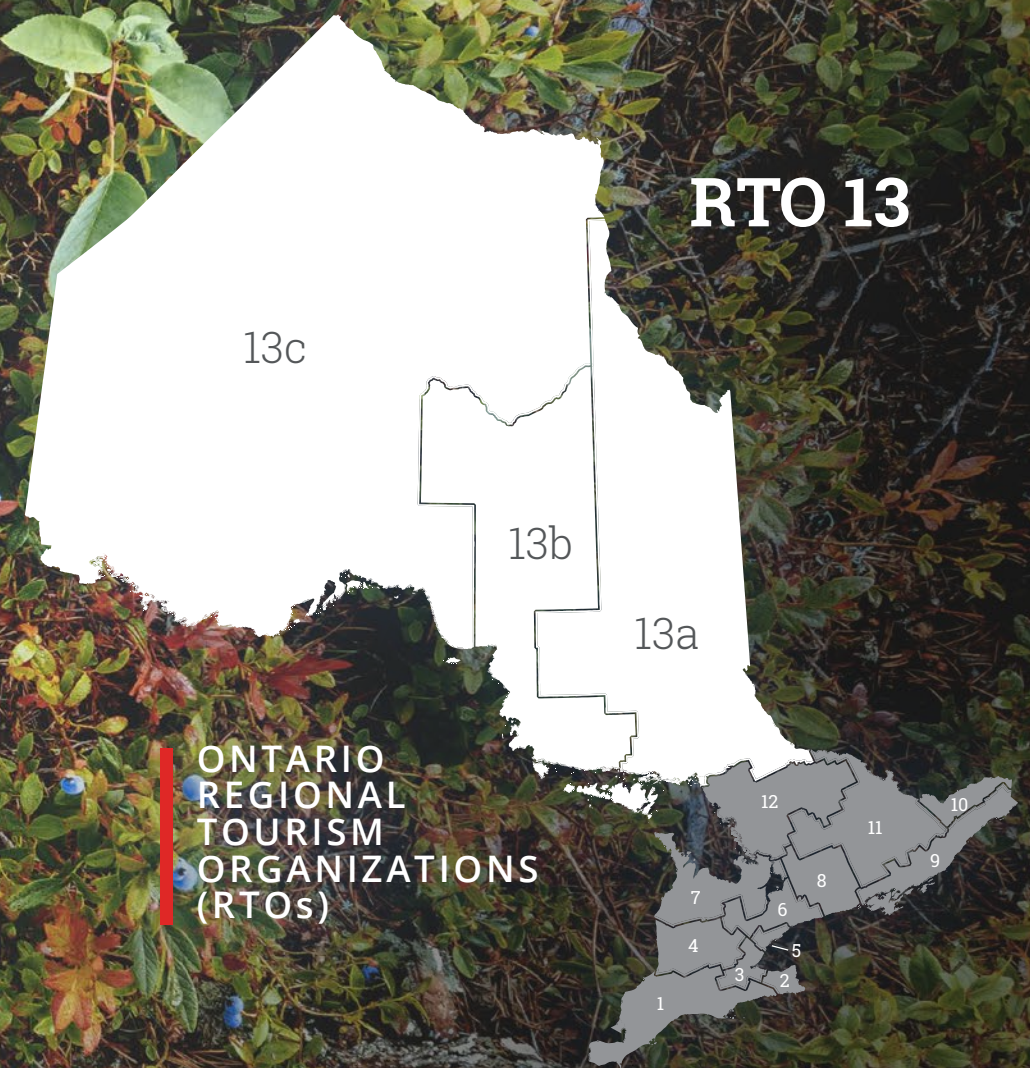


2024-25 Business Plan

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Message from the President

As we step into the 2024-25 fiscal year, we find ourselves at a pivotal juncture for tourism in Northern Ontario. Emerging from the challenges posed by the COVID-19 pandemic, we embark on a journey into the future alongside our industry partners, fortified and resilient.

Recognizing the need for continued innovation, we are committed to pushing boundaries in the realms of product quality, visitor experiences, and distinctive marketing campaigns that distinguish Northern Ontario on the global stage. Our region, rich in natural resources and scenic beauty, offers unparalleled access to experiences coveted by consumers. The heightened demand for open spaces, fresh air, inclusive communities, and unique tourism experiences positions Northern Ontario for a prosperous tourism season.

To harness the potential of both new and existing markets, Destination Northern Ontario's comprehensive programming aligns with growth strategies. Initiatives such as the Tourism Skills Net North Program aim to introduce new members



Wishing you an inspiring and prosperous year in tourism.

Yours in tourism,

Marty Kalagian
President,

DESTINATION
NORTHERN
ONTARIO

I am pleased to extend greetings on behalf of the Destination Northern Ontario Board of Directors and share our strategic vision through the presentation of our annual business plan for the upcoming 2024-25 fiscal year.

to our workforce, while the Tourism Excellence North program ensures the delivery of high-quality experiences. Furthermore, our commitment to product development projects, including Great Lakes Cruising, Experience Fishing, and 2SLGBTQ+ tourism experiences, reflects our dedication to diversifying offerings. We also plan to target key consumer segments, including our counterparts in transborder states, and explore emerging markets like domestic visitors in the Greater Toronto Area and beyond.

Recognizing the significance of collaboration, we acknowledge our partners as invaluable assets that drive our success. We will continue to engage both new and established partners to amplify our core investment from the Ministry of Tourism, Culture, and Sport, channeling additional resources into our region. While acknowledging the substantial work ahead, we are confident that, together, we can make the 2024-25 fiscal year a remarkable chapter in Northern Ontario's tourism narrative, propelling us closer to achieving our goal of representing 10% of all provincial tourism spending.

Message from the Executive Director

Like our Chair, I am pleased to extend greetings and extend well wishes from our team who work from locations across the region, to assist and grow the tourism sector here in Northern Ontario.

As we move from responding to real time impacts arising from the global pandemic to what we hope is a period of sustained growth for the sector, we are experiencing success but also seeing new and the re-emergence of systemic challenges that we faced prior to 2020.

On the positive side, operators who were successful at developing a domestic following generally are retaining those markets making their businesses more resilient. But conversely, we have not fully seen the return of the U.S. visitor now that borders are unrestricted, and we know many businesses have taken on more debt through the pandemic years. Transportation to and within the region has grown from an issue to a crisis.

Despite these and other challenges the future is bright for the North, and it is up to each of us to do our part to ensure our region is a preferred destination for visitors.

Through the Tourism Excellence North program, we have visited more than 150 tourism operations in Northern Ontario. While we have found those highly prized gems, we have also found many of our tourism businesses need to do more to increase their visitor appeal, product quality, and profitability.

We look forward to the year ahead and working together in partnership to deliver successful programming that will better enable all of us to grow and prosper.



Wishing everyone a busy and successful 2024!

David MacLachlan
Executive Director,

DESTINATION
NORTHERN
ONTARIO

Executive Summary

As we navigate the post-pandemic landscape, Destination Northern Ontario is positioned for a transformative period, shifting focus towards recovery and growth. While Northern Ontario was able to increase its share of provincial tourism receipts, we are concerned that we will see the re-emergence of a downward trend that existed prior to the pandemic. As such the Board of Directors through a five-year strategic plan will look to engage the sector, identify and address industry gaps, support recovery where needed, but more importantly look to facilitating growth in Northern Ontario's tourism economy. This annualized business and operational plan addresses the unique challenges and opportunities facing Region 13 in the 2024-25 fiscal year.

Strategic Focus

In the 2024-25 fiscal year, Destination Northern Ontario's strategic plan centers around identifying and supporting new opportunities for growth, addressing unique challenges stemming from the pandemic, re-engaging the sector, and overcoming systemic issues in Northern Ontario. In addition to supporting increased organizational excellence, the plan is structured around the Ministry of Tourism, Culture, and Sport's five pillars:

- 01 **Product Development**
- 02 **Investment Attraction**
- 03 **Workforce Development & Industry Training**
- 04 **Marketing and Communications**
- 05 **Partnerships**

To achieve its goals of innovation and entrepreneurship supported by research and education tools, the bringing to market a critical mass of high-quality products and experiences, realistic/sustainable tourism development and streamlined services for operators, Destination Northern Ontario will continue to focus its efforts in:

- 01 **Leadership;**
- 02 **Communications and Outreach;**
- 03 **Strategic Planning;**
- 04 **Relationship-Building;**
- 05 **Championing Industry; and**
- 06 **Setting a Standard of Quality.**

Integration with Ministry

Destination Northern Ontario is aligned with directives in the Regional Tourism Organizations Guide and the Ministry of Tourism, Culture and Sport (MTCS) Transfer Payment Agreement and supports work on identified provincial priorities. In addition, Destination Northern Ontario, will work to enact recommendations applicable to Regional Tourism Organizations arising from the recent Auditor General Value for Money Report.



Vision

Northern Ontario will be a unique and distinctive tourism destination wherein high-quality products and experiences resonate with consumers, entrepreneurship is valued, and tourism provides local, regional, and global connections for the entire region.

Mission Statement

Destination Northern Ontario will take a leadership role to strategically guide and champion growth in Northern Ontario's tourism industry, through strong communication, collaboration, and partnerships with industry.

Values

Destination Northern Ontario's Board is committed to focusing on the vision in an "innovative, results-based, effective and fiscally responsible manner, with a foundation of strong governance and management leadership." Destination Northern Ontario's Board also recognizes the following values as important aspects of the strategic plan:

- **Accountability**
- **Leadership**
- **Collaboration**
- **Integrity**
- **Transparency**
- **Innovation**
- **Teamwork**

Goals for Northern Ontario Tourism Sector

- Innovation and entrepreneurship are supported by research/educational tools
- Critical mass of high-quality products/ experiences are brought to market
- Realistic/sustainable tourism development (i.e., product-market match) is underway
- Streamlined services for operators are available

Destination Northern Ontario's Roles in achieving Sector Goals

- Leadership
- Communication
- Strategy
- Relationship-building
- Champion for industry growth (bringing the operator perspective to government)
- Professionalism (setting a standard of high quality for the industry)

Business Development Goals

Destination Northern Ontario has identified six Organizational Goals to highlight its desired leadership role in the industry; to ensure stronger alignment with Destination Ontario; to strengthen organizational excellence initiatives and ensure adherence to the Vision; and to meet the goals of the Ministry of Tourism, Culture and Sport.

- › **Generate** industry research and monitor industry performance to continually improve products and experiences and evaluate the success of Destination Northern Ontario programs to ensure a “visitor first” approach.
- › **Implement** a strategic approach to bring high-quality products and experiences to market through strong partnerships and workforce training.

Operational Excellence Goals

- › **Establish** organizational excellence through a corporate services division, and continue to improve internal and external communications, financial systems, and performance measurements.
- › **Build** strength for the organization through human resources and specialized expertise under each of the dedicated pillar areas, streamlining resources where possible.

Industry Leadership Goals

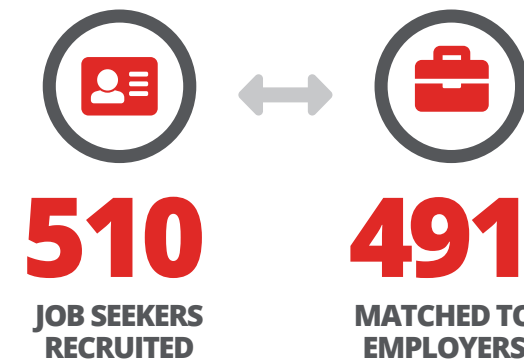
- › **Establish** Destination Northern Ontario’s role as industry leader under consolidated pillar priority areas: Product Development, Investment Attraction, Workforce Development and Industry Training, Marketing, and Partnerships.
- › **Foster** communication and relationship building in the tourism sector to ensure that industry stakeholders recognize Destination Northern Ontario’s role as a champion for growth and have access to relevant resources and programs.

Three Development Streams for Northern Ontario

- › **Defend & Maintain:** Existing tourism products and experiences in which Northern Ontario’s tourism industry excels.
- › **Inspire & Grow:** New products and experiences that will lead growth in Northern Ontario’s tourism industry.
- › **Rise & Shine:** Ensuring Northern Ontario’s tourism products and experiences are best in class in every aspect.

Successes

The Tourism SkillsNet North program in its third year was a resounding success as work expanded to include Regions 7 and 9 with a total of **510 jobseekers** recruited with **497 matched to employers** as of December 31st, 2023. Training has been completed by **367 participants in 28 cohorts.**



LEVERAGED INVESTMENT BY AN ADDITIONAL

82%
[\$3.25 MILLION]

Destination Northern Ontario was successful in **leveraging its 2022-23 MTCS investment** by an additional **\$3.25 million (82%)** in actual funds into the organization. This total is greater when the total value of all leveraged initiatives is considered.



7.9 MILLION+
VISITS TO DESTINATION NORTHERN ONTARIO WEBSITES

In 2022-23 Destination Northern Ontario achieved a record **7.9 million visits** to websites including **3.7 million** to NorthernOntario.travel and **4.2 million** to partner sites. Referrals stood at **992 thousand.**



Budget

Destination Northern Ontario receives a core funding allocation through the Ministry of Tourism, Culture and Sport, consisting of a base amount built on performance compared to provincial fixed-roof accommodation tourism receipts. There is also a partnership allocation that leverages partner contributions from non-Provincial government sources.

The following chart provides a summary of Destination Northern Ontario's budget for the period April 1, 2024, through March 31, 2025. The total allocation for the region per Ministry of Tourism, Culture and Sport for 2024-25 is **\$3,930,235.00**. However, it is expected that Destination Northern Ontario will leverage this investment by at least 50% through industry partnerships as well as agreements with funding partners at both the federal and provincial levels.

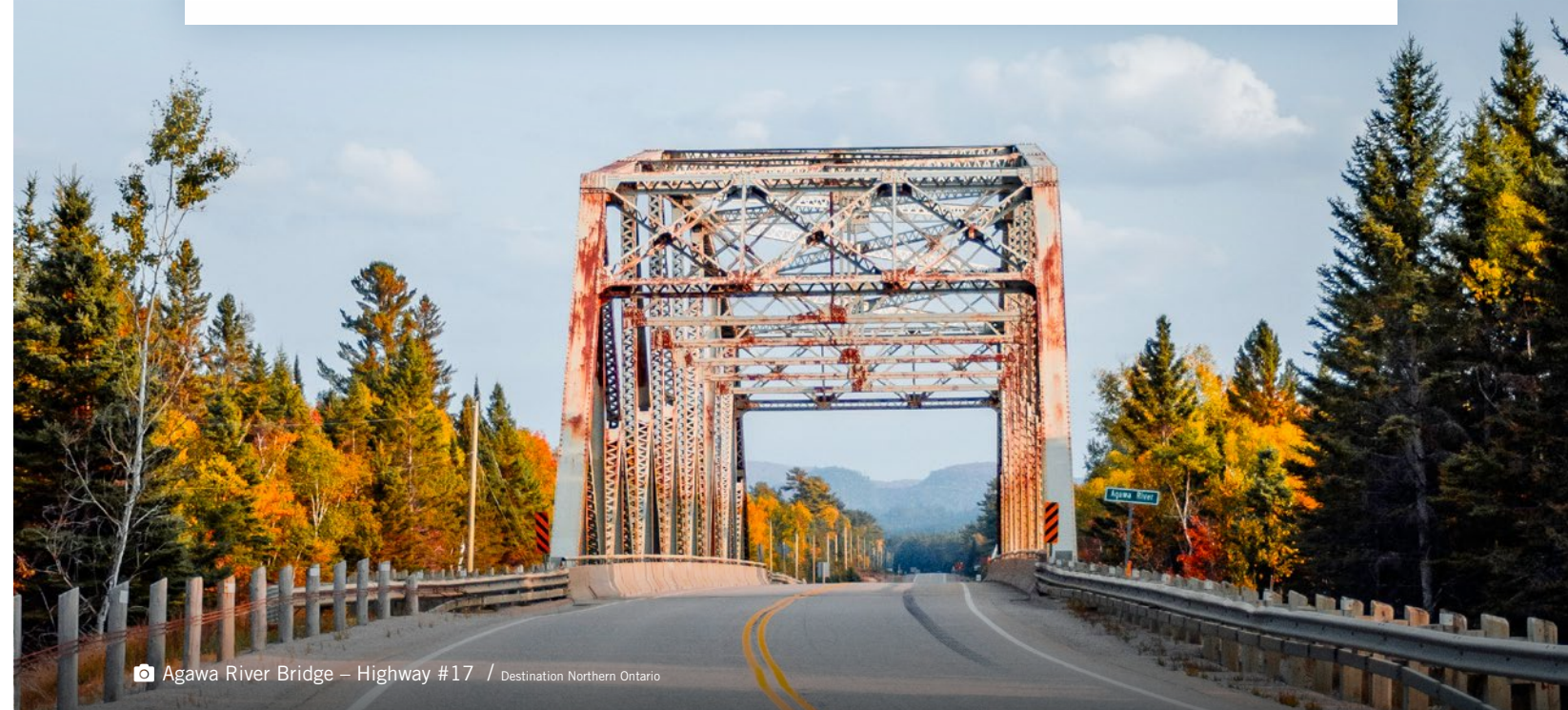
It is noted that there has been no increase in funding, and in fact only a decrease, since the inception of the regional tourism initiative, and that it is increasingly difficult to undertake planned activities without the support of partners, funders, and sponsors, as costs in all areas continue to rise.

Destination Northern Ontario is very similar to Newfoundland and Labrador in terms of landscape, product, population and distances between communities. Newfoundland has been very successful in being able to present itself as a destination appealing to a broad range of visitors and increased visitation over the past decade. Northern Ontario could be even more successful with proximity to market being more accessible, with a broader range of products and with high repeat visits of satisfied customers. An additional \$2 to \$3 million dollars, even over the short-term, would allow for Destination Northern Ontario to increase its destination marketing and maintain existing successful programs in all pillar areas.



Financial Plan (April 1, 2024 to March 31, 2025)

Area of Focus	\$	% Total Budget	% including Partnership
Governance & Administration	\$ 425,235.00	11%	11%
Product Development	\$ 375,000.00	10%	11%
Investment Attraction	\$ 325,000.00	8%	10%
Workforce Development & Industry Training	\$ 500,000.00	13%	16%
Marketing	\$ 1,700,000.00	43%	52%
Partnerships	\$ 605,000.00	15%	Included in pillar budgets
Total Eligible Expenses	\$ 3,930,235.00	100%	100%
Leveraged Contributions Goal	\$ 2,000,000.00	50%	MTCS requirement is minimum of \$605,000
Total	\$ 5,930,235.00	150%	



Agawa River Bridge – Highway #17 / Destination Northern Ontario

RTO 13 Regional Overview & Assessment

Tourism is a major economic driver in Northern Ontario with receipts ranking higher per capita than those of other regions in the province and many provinces in the country.

Tourism is the largest employer of young workers in the province and Destination Northern Ontario's research reveals that 40% of the workforce in the region, as well as one-in-five businesses are tourism-related. In 2019, tourism receipts in the region accounted for \$1.5 billion in spend, contributing \$1 billion to Ontario's GDP¹. Demand for accommodations in region 13 has increased by 31% from 2012-2017, at a compound rate of almost 7%.

However, as tourism has grown in Ontario, pre-pandemic we have seen a decline in provincial market share for Northern Ontario and a stagnation of tourism receipts. Through the pandemic, we have seen Northern Ontario perform at a higher level and it is anticipated that the region will retain some of the gains as U.S. and international visitors return, and with

dedicated programming, reverse the longer-term trend and grow tourism. A long-term goal has been set to increase the region's performance to 10% of the provincial spend.

COVID-19 had an unprecedented impact on the tourism industry during the 2020 and 2021 seasons, and therefore completely reshaped the regional profile of RTO13. In order to track the impact to the region, Destination Northern Ontario undertook impact surveys in partnership with Nature and Outdoor Tourism Ontario (NOTO), shared and supported impact surveys from the Tourism Industry Association of Ontario (TIAO) and continued tracking fixed roof accommodation performance throughout the year. This, with the addition of other provincial and federal impact studies, helped to inform the statistics and trends listed in the following assessment.

Visitor Statistics (2021 – Ontario / Region 13)

VISITOR SPENDING & OCCUPANCY			
	Ontario	Region 13	% Ontario
Number of Visitors	76.9 million	4.6 million	6%
Total Visitor Spend	\$12.9 billion	\$1.096 billion	8.5%
Hotel Statistics			
Occupancy	44.1%	52.5%	+19.4%
Daily Room Rate	\$128.80	\$115.17	-10.6%
RevPar.	\$56.79	\$51.86	-8.7%
Short-Term Rentals			
Occupancy	51.7%	60%	+16%
Daily Room Rate	\$149.71	\$129.64	-13.4%
RevPar.	\$77.43	\$77.79	+1%
Total Number of Tourism Establishments	81,576	3,725	4.6%

Source: MTCS Tourism Regional Profiles for 2021.





\$1.5
BILLION
IN TOURISM
RECEIPTS

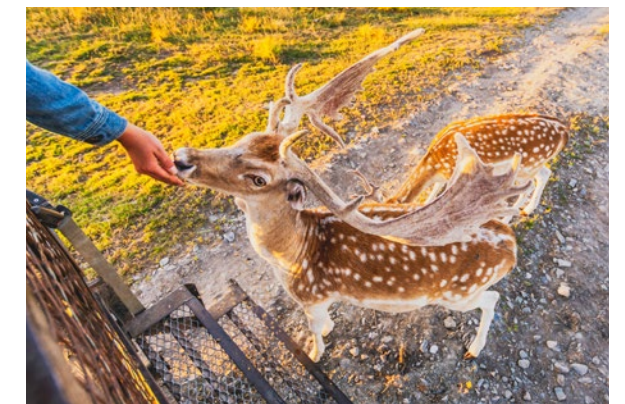
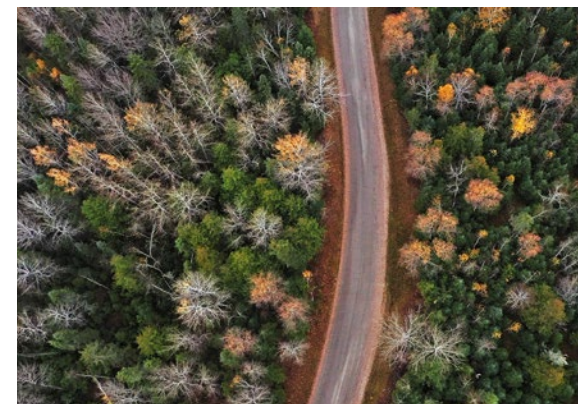


30%
INCREASE IN
DEMAND FOR
ACCOMMODATIONS



ONE-IN-FIVE
BUSINESSES IN
NORTHERN ONTARIO
ARE TOURISM-RELATED

TOURISM = #1
EMPLOYER
OF YOUNG WORKERS
IN ONTARIO



¹ Statistics Canada's National Travel Survey and Visitor Travel Survey 2019; CBRE Hotels Trends in the Hotel Industry National Market Report, AirDNA, Statistics Canada's Business Register 2019, MTCS.



Fixed-Roof Accommodation Performance Statistics (Urban)

While Northern Ontario performed better than much of the rest of the province in occupancy during the pandemic, we are now seeing a return to traditional occupancies. However, we have seen sustained improvement in 13B. While below the provincial averages there has been a tremendous increase in average daily rate and rev/par since 2019.

LOCATION	OCCUPANCY PERCENTAGE				AVERAGE DAILY RATE				REVENUE PER AVAILABLE ROOM			
	2023	2022	2019	%	2023	2022	2019	%	2023	2022	2019	%
13a Northeastern Ontario	62.4%	61.7%	61.5%	1.5%	\$154.48	\$136.35	\$123.79	24.8%	\$96.33	\$84.09	\$76.19	26.4%
13b Sault Ste. Marie-Algoma	66.5%	65.3%	59%	12.7%	\$143.62	\$132.10	\$115.35	24.5%	\$95.55	\$86.26	\$68.03	41%
13c Northwest Ontario	70.6%	74.2%	69.5%	1.6%	\$178.78	\$156.87	\$129.86	37.7%	\$126.29	\$116.41	\$90.25	40%
RTO13 TOTAL	65.3%	66.1%	63.4%	3%	\$156.16	\$139.89	\$124.38	25.6%	\$102.05	\$92.41	\$78.86	31.2%
ONTARIO TOTAL	69.4%	65.3%	68.7%	1%	\$200.13	\$180.12	\$163.04	22.7%	\$138.94	\$114.67	\$112.08	24%

Sourced from CBRE Monthly Accommodations Reports for RTO13. *2023, 11 months including November. Variance is compared to 2019.



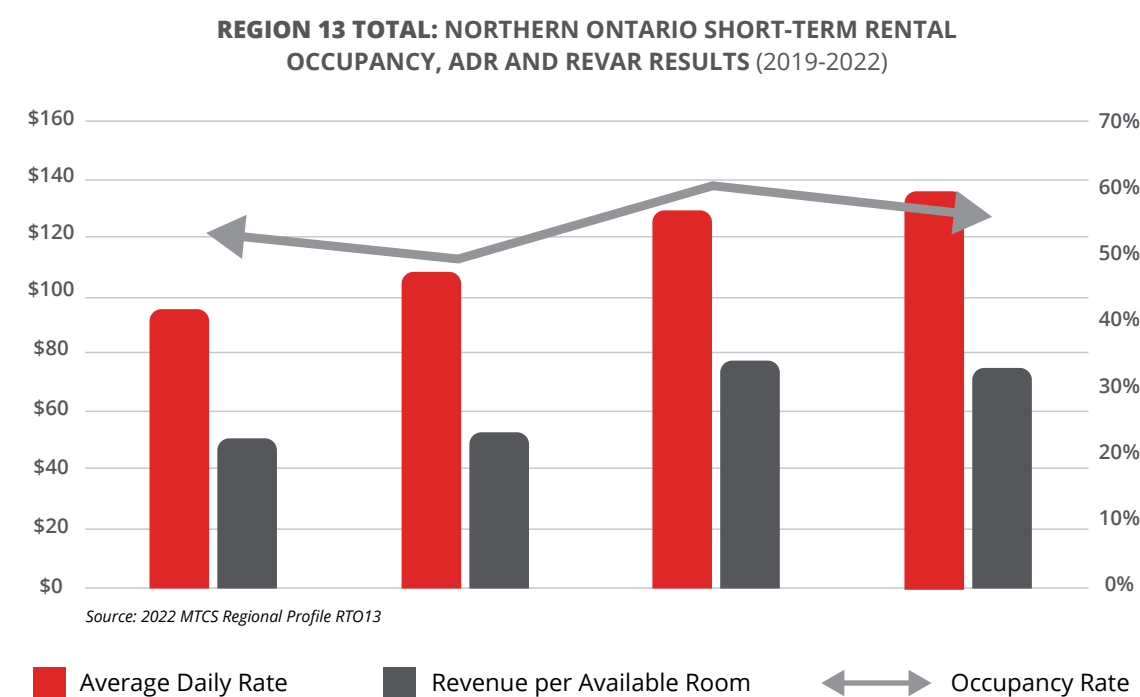
Fixed-Roof Accommodation Performance Statistics (Rural)

While we are awaiting results for 2023, in 2022 rural operators reported in our annual rural performance survey,

- > **70%** anticipated **steady or increased visitation** in 2023.
- > **87%** of survey respondents reported carrying **increased debt** since 2019.
- > **56%** of business in 2022 was business **carried over** from 2020 or 2021.
- > **43%** reported **decreased**, **32%** reported **increased** visitation over 2019.

Short Term Rental (STRs) Performance Statistics

Similar to hotels, motels and cottage rentals, short term rentals have grown in terms of number of units available but have decreased in occupancy.



The ability of the many tourism businesses, communities, and organizations across Northern Ontario to adapt and respond to COVID-19 has differed, based on each unique profile, market and financial capacity as noted above and has been uneven to date. While there are many bright spots and successes, some challenges remain.



Throughout the pandemic, a number of new visitor patterns and interests have emerged that include:



> **Parks and waterways** busy, some oversubscribed.



> **Campgrounds** full.



> **Marinas** busy.



> **Operations of all types along or near established, mainstream travel corridors** that include Highways 17 and 11 benefiting from strong demand, new guests.



> **Operations off main corridors, in remote locations or a great distance from major urban markets** are typically struggling.



> **Communities** and their economies starting to rebound after loss of festivals, meetings, conferences, sporting events. Activity in meetings, conventions and sports is on the rise.



> **Spikes in participation, equipment rental and sales** for canoeing, kayaking, cycling, hiking, RVing, snowmobiling, camping, motorized recreational vehicles.



> **Strong demand for snowmobile trails** and access to snowmobile product.

Ontario Border Crossings

With various border restrictions in place through most of 2022 it's no surprise visits from trans-border and international markets have not returned to 2019 levels. With the last of the border restrictions removed in the fall of 2022 it was anticipated we would see a rebound with visits from international markets and specifically the U.S. returning to traditional numbers in 2023. However, visits still lag pre-pandemic numbers. The resource-based tourism sector, especially in Northwest Ontario, is reliant on the U.S. market. U.S. visitors tend to stay longer and spend more than domestic visitors.

2023 INTERNATIONAL BORDER CROSSINGS INTO ONTARIO

Month	2023 Entries	vs 2022 % Chg	vs 2019 % Chg
January	428,109	332.1%	-28.5%
February	445,526	239.6%	-25.7%
March	534,673	144.2%	-30.7%
April	677,840	80.2%	-23.6%
May	870,309	66.9%	-21.9%
June	1,233,989	53.4%	-20.0%
July	1,472,672	43.4%	-21.3%
August	1,321,765	46.4%	-28.5%
September	975,145	38.8%	-14.2%
October	820,629	16.1%	-20.2%

Origin into Ontario	Jan-Nov 2023 Entries	Jan-Nov 2023 vs Jan-Nov 2022 % Chg	Jan-Nov 2023 vs Jan-Nov 2019 % Chg
International	11,689,942	55%	-24%
USA	9,431,390	56%	-23%
Same Day	3,856,998	81%	-32%
Overnight	5,574,392	42%	-15%
Overseas	2,258,552	50%	-26%

Statistics Canada. Table 24-10-0053-01 International travellers entering or returning to Canada, by type of transportation and traveller type

Trends and Visitor Patterns

National ²


Destination Canada has identified these key trends:


INDUSTRY TRENDS


1. Lack of Access and Reduced Transport Connectivity
2. Labour and Skills Shortage
3. Higher Costs
4. Reduced Business Travel and Events
5. Product Degradation
6. Reduced Access to Capital and Limited Liquidity
7. Shift in Capacity and Role of Destination Marketing Organizations (DMOs)

KEY MARKET TRENDS

1. Frictionless Travel
2. Domestic Travel
3. Responsible Travel
4. Ascendence of Communities
5. Indigenous Connection
6. Wild for Wilderness
7. Health and Wellbeing
8. Affluent Travel Boom
9. Great Resignation and Retirement
10. Remote Work and Residential Tourism

 **+883.7%** > **Border crossings from all key markets in March 2023 surpassed 2022 levels but have not reached pre-pandemic levels (2019)**

 **+307.2%**

 **+264.1%**

Highest increases in March 2023 were from (1) Japan (+883.7%), (2) Hong Kong (+307.2%) and (3) Brazil (+264.1%)

> International border crossings in March 2023 need to **increase an average of 30.4% to reach pre-pandemic levels (2019)**

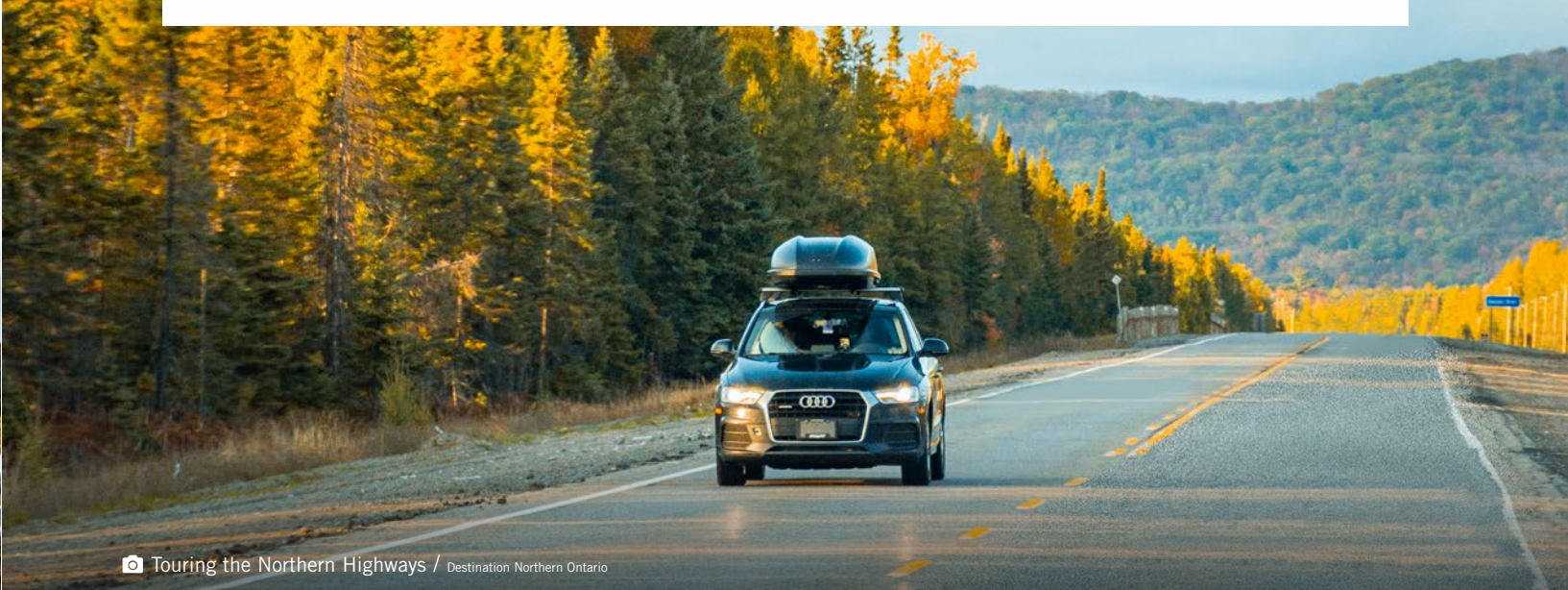
² Sourced from Destination Canada Research Summary (September 2021)

Provincial ³

Southern Ontario will continue to be an important source market for Northern Ontario in the coming year, and beyond as the travel industry navigates through post-pandemic realities. With a population of 12.8 million people, it is the largest market with proximity to the region and boasts a diverse demographic with higher income on average and over a quarter of the population being visible minorities.

- > Ontario has the largest market share for visits at **88.1%** and total visitor spending at **66.4%**.
- > There is an opportunity for Ontario to extend their stay to increase overall spend where other market's increased visits to Ontario will increase spend.
- > In April 2023, Ontario's Travel Price Index (TPI) increased **4.4%** compared with April 2022, following an **6.5%** increase in March.
- > Costs increased in accommodations (**+17.0%**), restaurants (**+5.4%**), and recreation/entertainment (**+3.8%**) and intercity transportation (**+3.4%**), while vehicle operation prices (**-1.5%**) and intercity transportation (**-3.6%**) declined in March 2023 compared with March 2022.
- > An increase in the TPI resulted in **higher prices for tourism-related goods and services** such as food, transportation, recreation and travel accommodation.
- > Budget-conscious travelers will most likely plan more in 2023 to help maximize vacation budget.

³ Sourced from Destination Canada Research Summary (September 2021)



📷 Touring the Northern Highways / Destination Northern Ontario

Emerging Demographic ⁴

Consumers under the age of 45 are 26% more likely to book a hotel vs over 45 years (2020-21). These consumers prefer engagement with “real and authentic” content. “Authentic” content inspires 65% of Generation X to book a trip; this could include first-person video content, influencers, personal blogs, etc.

- **YouTube watch time for travel videos is up 15% year over year. Trending topics include:**
 - National Parks (+22%)
 - Recreational vehicle (+30%)
 - Ski resorts (+ 46%)
 - Road trips (+ 49%)
- **Generation X** travellers will start to dominate the travel landscape in the coming decade; with 151M Generation X travellers worldwide they are 2x more likely to take a leisure trip vs the older generation. 68% use five (or more) social platforms including Instagram, Tiktok and Clubhouse and they have a combined spending power of \$350B annually.
- **From 2016 to 2019, international visitation grew from 2% to 4%.** What may seem like a small percentage actually accounts for a large increase in tourism receipts as the average international visitor spends nearly five times more than a visitor of domestic origin⁵.

⁴ Sourced from Google (Presentation made to Tourism Industry Association of Ontario October 2021)

⁵ Sourced from Destination Ontario Health Check May 2023



Insights from northernontario.travel

- **Domestic traffic** to the portal is **up 13% YoY** with the largest contributor being the GTA
- **U.S. traffic** dipped **7% YoY**
- **Paddling content (+22%)** and **Indigenous content (84+%)** continue to be emerging products of interest across all markets.

Source: northernontario.travel



Kamiskotia Ski Resort – Timmins / Destination Ontario



Workforce Overview

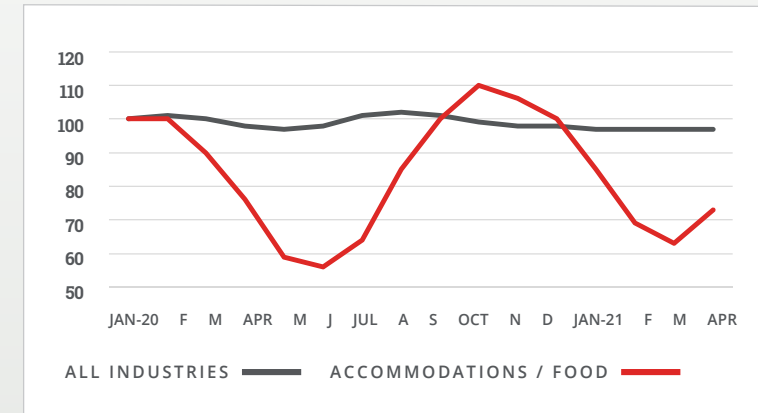
Accommodation and Food Services were especially hard hit as a result of the COVID-19 pandemic and the accompanying lockdowns. To illustrate the impact, the employment figures for this industry will be compared to overall employment levels minus the figures for Accommodation and Food Services, for each of Northeast and Northwest Ontario. In order to make for easier comparisons, the employment level on January 2020 for each data set will be given the value of 100 and each subsequent month for that area will be assigned a value as a proportion of 100 (which is a percentage of the January figure).

Both areas show roughly the same pattern: employment for Accommodation and Food Services drops sharply in the spring, bottoming out in July, in Northeast Ontario at 56% of its January employment and in Northwest Ontario at 63%. In both areas, employment started rising sharply toward the end of the summer and into the fall, actually surpassing January employment levels, and since then has dropped considerably so in Northeast Ontario. In March 2021, Accommodation and Food Services employment was at 63% of January 2020 levels in Northeast Ontario and at 87% in Northwest Ontario. August 2023 was still below their January 2020 figures in Northeast Ontario (minus 7%) and Northwest Ontario (a very large minus 20%).

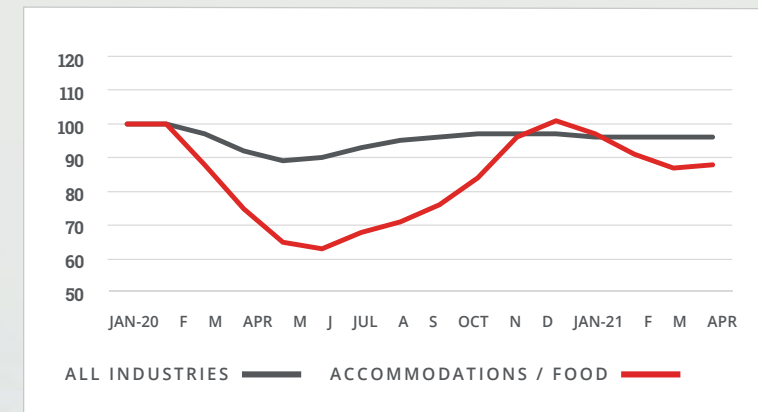
By comparison, employment in all the other industries dropped much less, bottoming in May 2020 at 97% of January 2020 employment in Northeast Ontario and 89% in Northwest Ontario. In the last six months or so, employment levels in all other industries have stayed between 96% and 98% of January 2020 levels in both regions.

Participation Rates include the following:

- **Youth aged 15-24** years old make up **31% of tourism employment in RTO13**, slightly higher than the provincial share at **27%**, and almost **triple** the youth share of all employment in the RTO13 area.
- **There are five tourism occupations where youth make up almost one-third or more of all employees:**
 1. Food service supervisors;
 2. Cooks;
 3. Hosts/hostesses;
 4. Food and beverage servers; and
 5. Food counters attendants (this latter occupation has the greatest number of employees in the tourism sector in RTO13, and youth represent 55%).
- The **Indigenous population in RTO13** accounted for **15.0%** of the employed labour force in 2021, almost **four times** the proportion for the **Rest of Ontario (4.1%)**.
- The **racialized population** among the employed labour force in RTO13 is a considerably smaller portion of workforce compared to the Indigenous population, **5.3% versus 15.0%**.
- RTO13 has a **higher proportion of Francophone employees** in its workforce compared to the Rest of Ontario, **16.2% compared to 6.5%**. Within RTO13, the Francophone workforce is highly concentrated in Northeast Ontario, where they account for **21.6%** of the total workforce, compared to **3.1%** in Northwest Ontario.



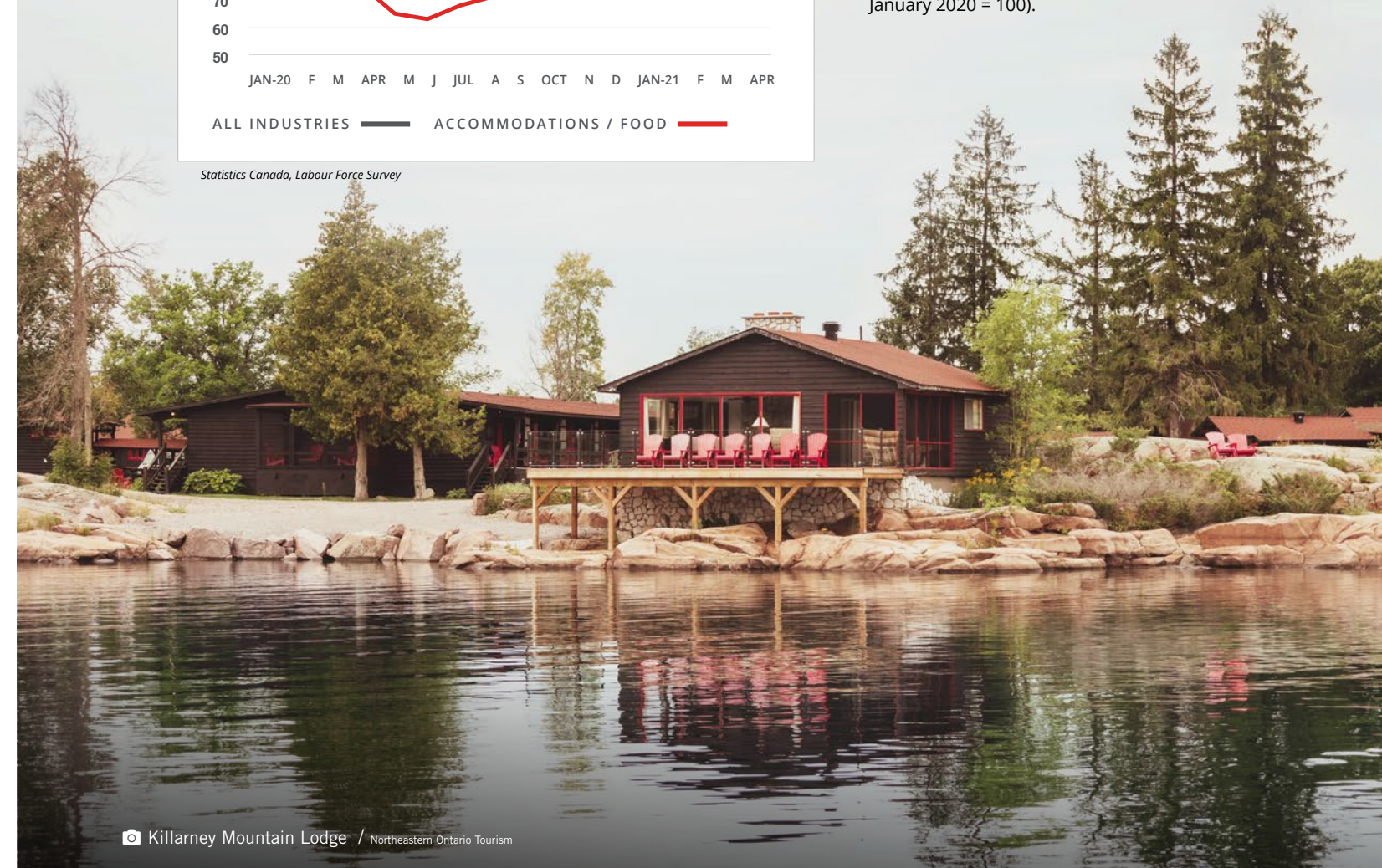
Statistics Canada, Labour Force Survey



Statistics Canada, Labour Force Survey

Chart 1: Ratio of employed residents, three-month moving average, those employed in Accommodation and Food Services and all other industries, Northeast Ontario, January 2020 to April 2021 (Employment level in January 2020 = 100).

Chart 2: Ratio of employed residents, three-month moving average, those employed in Accommodation and Food Services and all other industries, Northwest Ontario, January 2020 to April 2021 (Employment level in January 2020 = 100).



Killarney Mountain Lodge / Northeastern Ontario Tourism

Product & Experience Overview

Understanding that the global pandemic has created a new demand for domestic visitors, it is important that we look at products and experiences through the lens of short- and long-term development. Products and experiences were recently categorized into three different statuses (Defend and Maintain; Inspire and Grow; Rise and Shine) in the 2020-21 Business Plan for Destination Northern Ontario; however, these products should be contextualized within the realities of post-pandemic recovery.

01 Defend & Maintain

DEFEND AND MAINTAIN: a product or experience that is well established in consumer base, revenue, and inventory. Market shares need to be protected; consumer base may need expansion.

Angling

› **Northern Ontario** is the top destination in Canada for high-yield anglers with angling tourism generating over **6,000 jobs** and contributing **\$450 million towards Ontario's GDP**. There is room for growth in new consumer bases, market shares need protection and infrastructure may need investment.

Hunting

› **Northern Ontario's** hunting tourism product is at capacity and stressed. Very little room for growth is available.

02 Inspire & Grow

INSPIRE AND GROW: a product or experience that has excellent potential for growth in consumer base, revenue, and inventory. Market shares need to be developed; product inventory needs growth; existing product may need diversification.



Nature & Adventure

› **Northern Ontario** is home to **endless, diverse natural resources** which are a major driver for visitors to the region.

The domestic demand for nature and adventure (soft outdoors product) is high and will continue to peak throughout the pandemic with travel options restricted through the country. This product should be developed quickly and promoted appropriately through domestic influencers and in nearby markets.

Touring

› **Snowmobile and motorcycle touring** are considerably developed in Northern Ontario. **Auto and RV** continues to be an area of interest and could be a cornerstone for future international marketing.

Domestic demand for both snowmobile and motorcycle touring were high during the 2020 through 2023 seasons. These products should be promoted appropriately through domestic influencers and in nearby markets. RV touring had tremendous growth in the same season with supply not able to meet demand. Relationships should continue to be fostered with RV rental companies to ensure a successful 2024 season.

Culture & Heritage

› **Home to many Group of Seven painting sites**, Northern Ontario has developed tourism product around the legendary artist group including driving routes and interpretive displays.

Gateways & Destination Communities:

› With the implementation of the new **Municipal Accommodation Tax**, urban tourism product has massive potential in terms of investment into development, marketing, and training. Destination Northern Ontario looks to lead the region's large and small urban centres on pan-northern projects that will elevate the status of urban tourism products in the North while increasing tourism receipts at the local level. Due to the spread of COVID-19 globally, we have seen revenue from the Municipal Accommodation Tax plummet. Destination Northern Ontario will be monitoring this situation closely.

Product & Experience Overview



03 Rise & Shine

- › *Creating a culture of excellence in all tourism product development and marketing efforts undertaken by Destination Northern Ontario by not only ensuring that visitors have what they need and want but also by exceeding expectations in customer service and overall experience.*



Trends from Tourism Excellence North *Fast Track to Success*

TEN's Fast Track to Success (FTS) is a one-on-one coaching program, delivered by a skilled consultant retained by Tourism Excellence North (TEN) – called a TEN Specialist.

Working with owners and operators at their businesses during their operating season, over a 24- hour period, the TEN Specialist provides practical and useful advice to improve the operation. The coaching opportunity includes a pre-visit survey, on-site visit by the TEN Specialist, recommendations that 'can be implemented the next day' and two post-visit opportunities for support.

To date 154 operations have completed this program which has identified some key trends:

- › **2/3** of businesses require improvements to physical buildings, interiors or surroundings including wayfinding, parking, and accessibility.
- › **50%** need to look at new products and/or markets, have narrow product offerings, and need to review ROI and offer higher yield products.
- › **50%** need to improve quality of staffing and improve communication with customers.
- › **2/3** need to pursue funding and **40%** review and change their pricing structures.
- › **3/4** need to develop, update, or otherwise enhance their web and/or social media presence.
- › **2/3** recommended to work more closely with tourism organizations, **50%** to better leverage their customer networks, and **40%** improve their branding.



Business & Operational Overview

Destination Northern Ontario is governed by a pan-Northern Ontario Board of Directors who are recognized industry leaders and who collectively provide vast knowledge, experience, and insight as they set the strategic directions for the organization. The organization maintains representation on the Board from the private sector at more than 50%.

The Board of Directors regularly consults with and is provided with guidance by an advisory group comprised of key government officials in tourism-related ministries and agencies. The advisory group is a key component to the Board of Directors' strategic planning and consultation process. The representatives are from the Ontario Ministry of Tourism, Culture and Sport, the Ministry of Energy, Northern Development and Mines, Destination Ontario, FedNor, Ontario Parks and Parks Canada.



ONTARIO REGIONAL TOURISM ORGANIZATIONS (RTOs)



DESTINATION ONTARIO



Federal Economic Development Agency for Northern Ontario / Agence fédérale de développement économique pour le Nord de l'Ontario



2024-25 Destination Northern Ontario Board of Directors:

NAME	POSITION	SECTOR
Marty Kalagian	President	Private Sector – Retired
Gerry Webber	Vice President	Public Services Sector – Retired
Betty McGie	Treasurer	Private Sector – Retired
Heather Gropp	Secretary	Municipal Government
Lori Branch	Director	Private Sector
Tammy Frick	Director	Not for Profit
Guy Lamarche	Director	Public Services Sector – Retired
Ray Nadeau	Director	Private Sector
Shannon McMullan	Director	Private Sector
George Stivrins	Director	Private Sector
Ian Wood	Director	Municipal Government – Retired

Government Advisors:

NAME	POSITION	SECTOR
Jim Antler	Advisor	Ministry of Tourism, Culture and Sport
Laurie Ypya	Advisor	Ministry of Northern Development
Todd Eastman	Advisor	Destination Ontario (MTCS)
Heather McKeown	Advisor	FedNor
Vacant	Advisor	Ontario Parks
Chad O'Halloran	Advisor	Parks Canada

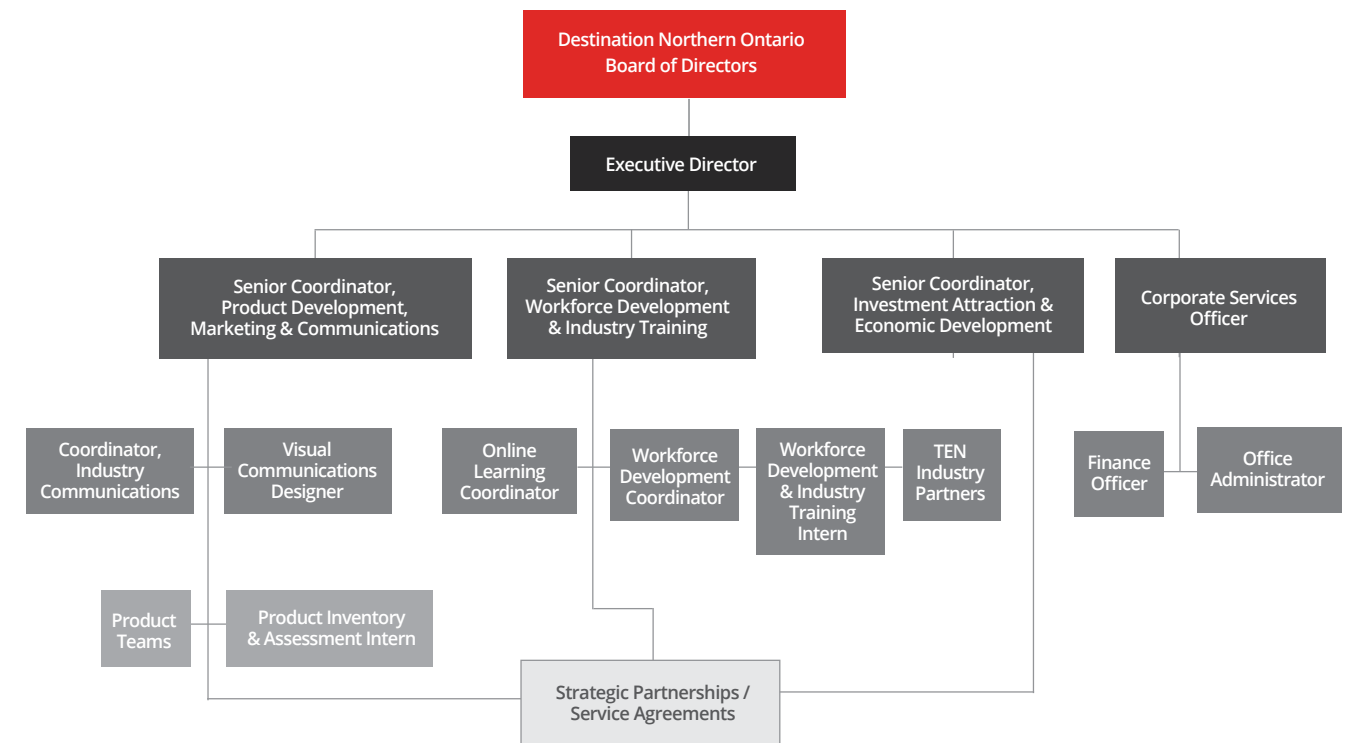
Destination Northern Ontario Staff:

NAME	POSITION
GOVERNANCE & ADMINISTRATION	
David MacLachlan	Executive Director
Bobbi-Lynn Pallot	Corporate Services Officer
Kathy Carlson	Finance Officer
Karen Poirier	Office Administrator
PRODUCT DEVELOPMENT, MARKETING & COMMUNICATIONS	
Stephanie Hopkin	Senior Coordinator, Product Development and Marketing & Communications
Sara Currier	Coordinator, Industry Communications
Tiina Keranen	Visual Communications Designer
Megan Boyd	Product Inventory Intern
INVESTMENT ATTRACTION & ECONOMIC DEVELOPMENT	
Gord Knowles	Senior Coordinator, Investment Attraction & Economic Development
WORKFORCE DEVELOPMENT & INDUSTRY TRAINING	
Karen Peacock	Senior Coordinator, Workforce Development & Industry Training
Gillian McCullough	Learning Coordinator
Jan van Oordt	Workforce Development Coordinator
Naza Obasi	NOHFC Intern
DESTINATION NORTHERN ONTARIO SUPPORT TEAMS (Under Contract)	
Ian McMillan	International Marketing Specialist
Marla Tremblay	Francophone Tourism Specialist
Mike Wozny	Special Project Coordinator



DESTINATION NORTHERN ONTARIO'S

Organizational Structure



An important component to Destination Northern Ontario's success is the dedication of the Board towards implementation of all strategic objectives, and adherence to Board policies to ensure that appropriate governance, sound advice, and oversight of the organization are being met.

Furthermore, the Board will continue to monitor progress to ensure that Destination Northern Ontario is successful in reaching its overall goals and objectives. The Board of Directors will meet in person a minimum of four times throughout the year.

The Board of Directors has developed and maintains a Succession Plan for all Board and Staff positions ensuring both smooth transition and renewal.

Core Priority Pillars

Destination Northern Ontario has dedicated itself to taking a leadership role to guide Northern Ontario’s tourism industry. As such, this business plan not only incorporates Ministry of Tourism, Culture and Sport (MTCS) program pillars but also includes goals to achieve Organizational Excellence.

The following table highlights Destination Northern Ontario’s core priority pillars that allow the organization to meet MTCS reporting requirements:

PROGRAM PILLARS	DESTINATION NORTHERN ONTARIO OPERATIONAL AREAS / KEY PROGRAMS
Corporate Services & Governance	Governance, Organizational Excellence (Administration), Outreach
Product Development	Engaging the sector and supporting growth in priority products and experiences. Improved visitor services.
Workforce Development & Industry Training	Supporting recovery and growth through the Tourism Excellence North and Tourism SkillsNet North programs.
Investment Attraction	Engaging the sector, supporting, and facilitating investment attraction across the region.
Marketing & Communications	Providing marketing tools and tactics to grow tourism across the region. Engaging the sector.
Partnerships	Reflect all pillar areas.

For the organization to demonstrate leadership, the staffing plan has been developed to reflect pillar area leadership, with the following roles:

- Senior Coordinator, Product Development
- Senior Coordinator, Workforce Development & Industry Training
- Senior Coordinator, Marketing & Communications
- Senior Coordinator, Investment Attraction & Economic Development

Destination Northern Ontario’s Executive Director manages all Senior Coordinators and is tasked with ensuring that initiatives under staff leadership are completed for each pillar area. The Executive Director along with the Senior Coordinators form a senior management team.

Destination Northern Ontario has increased its resources this fiscal to support additional investment attraction activities. Overall, the organization plays a supporting role when it comes to investment attraction. However, Destination Northern Ontario will play an active and leading role in finding solutions for sustainable regional tourism development.

It is not expected that all staff will be located at the Destination Northern Ontario office in Sault Ste. Marie. However, Senior Coordinators with office space in other locations will be required to act as representatives of Destination Northern Ontario for their respective community and sub-region. As such, it is expected that during the hiring process, Destination Northern Ontario ensures adequate representation in all three sub-regions. In keeping with Ministry of Tourism, Culture and Sport guidelines and Destination Northern Ontario’s mission to establish a leadership role in the various program pillar initiatives, salaries are allocated to affiliated pillar areas.

Performance & Reporting

The Executive Director and Senior Coordinators will monitor implementation of initiatives in the annual business plan. Performance will be measured in each of the pillar areas. This will be accomplished through internal reporting, face-to-face team lead meetings, teleconferences and senior staff working directly with the Executive Director.

The Board will monitor progress and performance through a combination of dashboard reports, pillar updates and financial reports as well as review Ministry of Tourism, Culture and Sport performance and progress reports.

Destination Northern Ontario will submit on-time reports to the Ministry of Tourism, Culture and Sport, including progress and final reports, financial documents and appropriate attestations identified in the transfer payment agreement.

Governance & Administration

OBJECTIVE

Old Growth Pine Forest / Destination Northern Ontario

The primary objective to guide Governance & Administration for Destination Northern Ontario over the next year is:

To ensure strong governance and organizational excellence while enhancing product development, investment attraction, workforce development and industry training, marketing, communications, and partnership development in the tourism sector.

This pillar is managed by the Executive Director, Corporate Services Officer, and Finance Officer with support from the Office Administrator. They will organize themselves around three management functions to ensure organizational excellence.

1. Operations.
2. Financial Administration.
3. Office Administration.

Staff follow Destination Northern Ontario's Operational Policies and Processes Manual, Health and Safety Plan, Succession Plan, Risk Management Plan, Strategic Plan, and annualized business plan.

Staff will continue to ensure the workplace remains safe and productive by monitoring and responding in real time to impacts and developments related to the global pandemic.

With respect to the Board, there are Board Governance Policies in place, and the Board will monitor its own processes and the progress with initiatives identified in the strategic and annualized business plans.

Governance & Administration | Strategic Focus

01 Priority Action Area

Ensure staffing plan aligns with strategic plan and consistently monitor resource allocations to ensure long-term organizational excellence, stability, and sustainability. **\$225,235.00**

Key Activity	Output	Outcome	Quarter	Status	
a	Review resource needs for all Destination Northern Ontario (DNO) programs.	Scan of available funding and application processes overseen by Executive Director with support from administrative staff.	Enhanced organizational excellence with 100% initiatives and reporting completed.	Q1-4	Continued
b	Explore new funding opportunities including sponsorship.	Staff participate in meetings.	Increased programming with budget leveraged by a minimum of \$2 million/50%.	Q1-4	Continued
c	Conduct regular staff meetings and undertake annual staff performance reviews and evaluations for each staff member.	Senior staff complete reviews for team members.	Improved alignment, coordination, and proficiency with 24 staff meetings, 24 senior staff meetings per year, and 100% annual performance reviews completed for each staff person.	Q1-4 Evaluations Q4 and Q1	Continued
d	Identify opportunities for professional development, renewal, and succession.	Executive Director completes reviews for senior staff.	Improved capacity with a minimum of 6 staff enrolled in professional development or other training.	Q1-4	Continued
e	Maintain a safe, positive, and effective workplace.	Executive Director works with senior staff during evaluations and as opportunities are presented.	Increased productivity with DNO meeting or exceeding 100% of all requirements.	Q1-4	Continued
f	Develop, communicate, and adhere to service standards.	CSO manages safety committee and ensures organization current in all policies, training, and procedures.	Improved organizational excellence with 100% staff compliance with standards.	Q1-4	New
g	Adhere to and monitor compliance to DNO policies and plans. Undertake an annual review to ensure relevance.	CSO develops, communicates, and monitors service standards.	Improved organizational excellence with 100% staff compliance and 100% policies reviewed.	Q1-4	Continued
h	Measure effectiveness and satisfaction of broader sector, committees, and working groups.	CSO communicates, monitors, and conducts annual review.	Engaged sector with minimum 75% satisfaction rating.	Q1-4	Continued
i	Conduct annual reviews and audits of contracts, mandates, and deliverables.	Annual performance surveys completed.	All service contracts with outside organizations reflect DNO's mission and vision with 100% deliverables met.	Q4	Continued

Governance & Administration | Strategic Focus

02 Priority Action Area				
<p>Enhance strength and effectiveness of Destination Northern Ontario through good governance and Board renewal, to cultivate a culture of integrity and accountability, leading to positive performance and sustainability.</p>				\$50,000.00
Key Activity	Output	Outcome	Quarter	Status
a	Adhere to Board governance policies and procedures, compliance with provincial conflict of interest policies, and conduct annual review.	Board, Executive Director (ED), and CSO monitor and review governance policies. Enhanced organizational excellence with 100% of policies followed and reviewed.	Q1-4	Continued
b	Undertake annual board and lead staff evaluations.	Board chair initiates and manages process with support of ED/CSO. Enhanced organization excellence with 100% of evaluations completed.	Q4, Q1	Continued
c	Identify opportunities for professional development, renewal, and succession of board members.	Board chair initiates and manages process with support of ED/CSO. Enhanced organizations excellence with 1 Succession plan updated.	Q4, Q1	Continued
d	Focus on strategic implementation.	Board of Directors meets to monitor progress and prioritize strategic plan and business plan initiatives. Enhanced organizational excellence with Board meeting minimum of 8 times per year and maintaining attendance at a minimum of 75%.	Q1-4	Continued
e	Review, research, and develop internal policies and identify opportunities to increase diversity, equity, and inclusion.	Board of Directors monitors and contributes to process led by ED/CSO. Improved inclusivity.	Q1-4	Continued
f	Undertake internal review to audit all program areas with a view to increase engagement, effectiveness, and return on investment.	Board of Directors with support from ED/CSO retain professional services to undertake review. Improved and more effective programming with 100% of all program areas audited.	Q1-2	New
g	Maintain five-year strategic plan and develop annualized business plans in accordance with MTCS directives.	Board of Directors monitors and contributes to process led by ED with support of senior staff. TPA secured. Enhanced organizational excellence with 1 annual business plan completed and submitted successfully to MTCS.	Q3-4	Continued

Governance & Administration | Strategic Focus

03 Priority Action Area				
<p>Maintain physical office premises and provide adequate resources to ensure successful execution of business plan.</p>				\$50,000.00
Key Activity	Output	Outcome	Quarter	Status
a	Maintain a productive workspace for all employees.	Offices maintained in Sault Ste. Marie, Sudbury, and Atikokan. Increased presence with 3 offices open for business.	Q1-4	Continued
b	Encourage staff to meet and work collaboratively across three locations and for those who work remotely.	Working and meeting space created that provides for video conferencing. Increased alignment, collaboration, and effectiveness with connective meeting and working space in both SS Marie and Sudbury.	Q1-4	New

04 Priority Action Area				
<p>Confidently manage Destination Northern Ontario finances following all policies and procedures.</p>				\$50,000.00
Key Activity	Output	Outcome	Quarter	Status
a	Track performance and provide reports to funders as required and on-time.	CSO completes funding reports with support from ED, FO, Office Admin, Senior Staff, and team members as appropriate. Enhanced organization excellence and leveraged resources with 100% of funding reports completed accurately and submitted on-time.	Q1-4	Continued
b	Identify and monitor priorities/initiatives that require compliance with Destination Northern Ontario's Risk Management Plan.	CSO manages process with support of senior staff. Enhanced organizational excellence with 100% staff compliance on all appropriate initiatives.	Q1-4	Continued
c	Maintain relationships with legal and accounting professionals.	CSO and FO retain legal and audit teams. Enhanced organizational excellence with 100% of audit(s) completed on-time and clean.	Q1-4	Continued
d	Follow DNO financial policies and processes.	FO with support of CSO and office admin monitors compliance. Enhanced organizational excellence with 100% of policies followed.	Q1-4	Continued

Governance & Administration | Strategic Focus

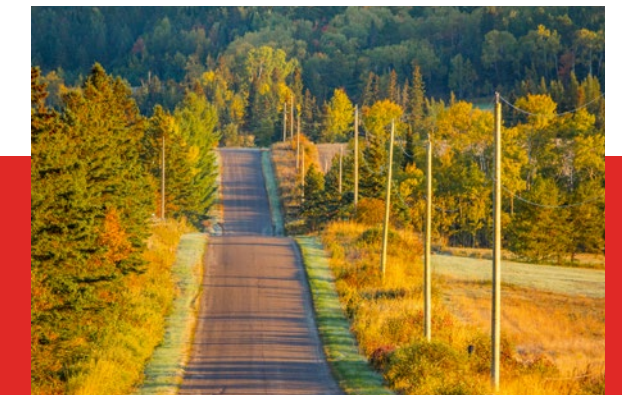
05 Priority Action Area					
Staff travel as necessary to execute business plan pillar initiatives.				\$25,000.00	
Key Activity	Output	Outcome	Quarter	Status	
a	All travel is consistent with DNO travel policy.	All staff follow policy that is monitored by CSO with all travel approved by ED.	Enhanced organizational excellence with 100% staff compliance.	Q1-4	Continued

06 Priority Action Area					
Maintain membership in key tourism industry organizations.				\$15,000.00	
Key Activity	Output	Outcome	Quarter	Status	
a	Maintain memberships in industry organizations.	Memberships maintained in, <ol style="list-style-type: none"> Destinations International Travel Industry Association of Canada (TIAC) Travel Industry Association of Ontario (TIAO) Northern Ontario Tourist Outfitters Association (NOTO) 	Increased collaboration, effectiveness, knowledge, and capacity with 4 memberships maintained.	Q1-4	Continued
b	Champion Northern Ontario's tourism sector by being a productive member by contributing industry knowledge.	Staff participate on boards, committees and participate in events.	Increased knowledge of Northern Ontario's tourism sector through staff participation in 4 tourism organizations.	Q1-4	Continued
c	Access full range of member benefits.	Staff access and participate in membership benefits.	Increased capacity with 4 lead staff accessing professional development benefits.	Q1-4	Continued

Governance & Administration | Strategic Focus

07 Priority Action Area					
Ensure organization is adequately resourced in the area of information technology.				\$10,000.00	
Key Activity	Output	Outcome	Quarter	Status	
a	Conduct annual review to ensure staff and board are adequately resourced.	Process managed by CSO.	Increased organizational excellence with 100% staff and board satisfied with available resources.	Q1-4	Continued
b	Continue migration to a common document and file sharing system.	Process managed by CSO with support of office admin and communications team.	Increased organizational excellence with 100% all project and partner (ship) related files available through file sharing system.	Q1-4	Continued
MTCS Budget Total			\$425,235.00		

☑ Performance Measures	
✓	Board, staff, partner engagement and satisfaction with progress in accomplishing strategic directives compared to target (75% board attendance, 75% overall satisfaction).
✓	Percentage of planned initiatives undertaken, completed and on-budget compared to target (75%) and percentage of core budget leveraged compared to target (50%).
✓	Annual financial audit is completed clean, on-time, and with no deficit.
MTCS Budget Total	
\$425,235.00	



Destination Development

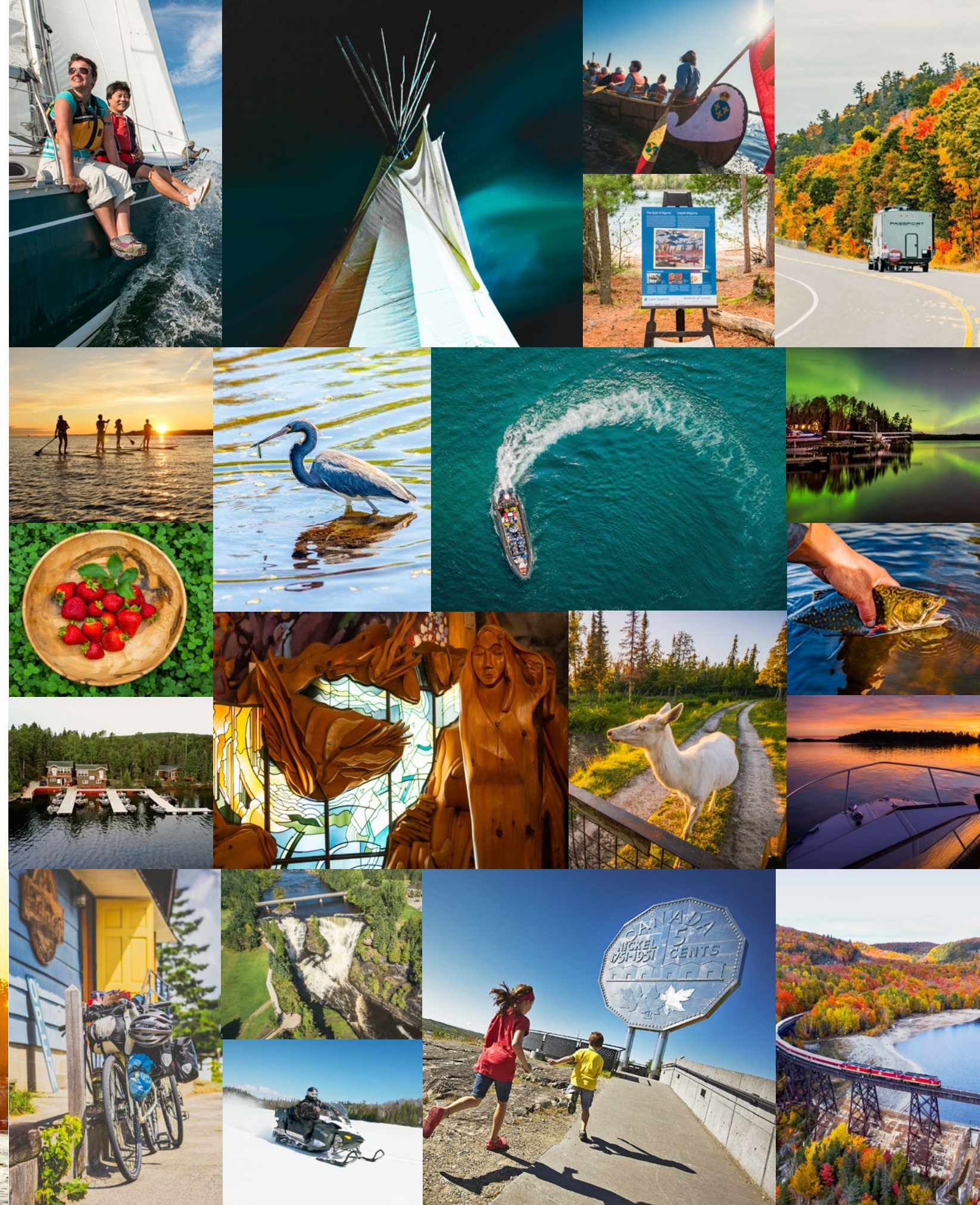
Destination Northern Ontario lead staff continue to proactively collaborate on initiatives across all pillars and to develop and implement product plans, as well as broader destination development strategies across the region, the three sub-regions and individual municipalities as well as unique smaller geographic areas.

The Ministry of Tourism, Culture and Sport defines destination development as "a collaborative approach to enhancing a location as a desired destination for tourists that encompasses all/any of marketing, product development, investment attraction and workforce development."

Destination Development may include:

- Understanding what draws visitors to a place;
- Developing the right products/experiences/services to meet visitor needs; and
- Effectively marketing priority products to a target market.

Close to 50% of Destination Northern Ontario's allocation from the Ministry of Tourism, Culture and Sport is focused on destination development activities in product development, investment attraction, workforce development and industry training, and the provision of marketing tools and research to the sector. This figure grows when taking into account its initiative under the Skills Development Fund with the Ministry of Labour, Immigration, Training and Skills Development, and leveraged partnered budgets.



01 Product Development

OBJECTIVE

📷 Climbing Outbreak Wall – Thunder Bay / Thunder Bay Tourism – Photo by Tim Banfield

The primary objective to guide Product Development in Northern Ontario over the next year is:

To enhance the visitor experience through well-designed tourism products that meet current and future customer demand.

The product development priorities for this fiscal year aim to elevate the visitor experience by crafting well-tailored products in response to current and future customer demands. Under this priority, the plan calls for vigilant oversight of resources to execute planned initiatives.

A Senior Coordinator, supported by administrative staff and a product development and investment attraction coordinator, will spearhead the execution of pillar activities. The goal is an enhanced performance metric, ensuring 100% of initiatives are not only completed on time but also within budget.

Maintaining momentum and sustaining the appeal of Northern Ontario's flagship products and experiences is a key priority for 2024-25. The plan proposes a comprehensive review, inventory, assessment, and identification of champions for current best-bet products through reorganized product teams.

This collaborative effort is expected to yield improved, targeted programming and increased industry alignment.

A key initiative involves investing in sub-regional programs to augment market-ready products for the region. Partnerships with local Destination Marketing Organizations will be established to increase the delivery of TEN training tools. The anticipated outcome includes increased capacity with the delivery of four sub-regional programs and the creation or augmentation of 20 market-ready products.

Strategic collaboration is instrumental to leverage funding from the Ministry of Tourism, Culture, and Sport (MTCS). This will ensure maximum collaboration with partners while leveraging ministry investment by a quarter of a million dollars.



Fortifying visitor services and product quality across the region will include a review of DNO's TIC Strategy and improved coordination among Northern Ontario Visitor Information Centers (VICs). The Senior Coordinator of Workforce Development and Industry Training will manage this strategy, identifying opportunities for improved VIC wayfinding. The expected outcome is improved alignment, coordination, and visitor services, including the updating of at least one strategy and the completion of a minimum of one VIC wayfinding initiative.

Product Development | Strategic Focus

01 Priority Action Area

Implement staffing plan and ensure provision of resources to demonstrate leadership, execute, and report on initiatives within the product development pillar. **\$145,000.00**

	Key Activity	Output	Outcome	Quarter	Status
a	Monitor resources to execute planned initiatives ensuring completed, on time and on budget.	Senior Coordinator manages execution of pillar activities with support of admin staff and junior coordinator.	Improved performance with 100% of initiatives completed on time and on budget, with reporting complete and on time.	Q1-4	Continued
b	Review DNO Product Plans.	PD Staff with support of product teams identify which plans will be reviewed and work collaboratively to review and refresh plans as necessary.	Improved performance with minimum four product plans reviewed and refreshed as necessary to remain current and relevant.	Q1-4	Continued



Product Development | Strategic Focus

02 Priority Action Area

Maintain the momentum for Northern Ontario's best-bet products and experiences by concentrating on priority product development initiatives that will enhance the visitor experience, resonate with new and existing visitors, and lead to increased visitation and yield.

\$200,000.00

Key Activity	Output	Outcome	Quarter	Status
a Review, inventory, assess and identify champions for current best bet products and experiences from a visitor first perspective through reorganized product teams and working groups.	Senior Coordinator supported by NOHFC intern manage identified product teams and working groups.	Targeted programming that supports recovery and growth with improved, targeted and relevant programming as well as increased industry alignment and coordination with, minimum 11 active product teams or working groups, holding minimum 30 meetings, and engaging minimum of 100 stakeholders.	Q1-4	Continued

Current Product Teams

Angling & Hunting

1. Angling

Culture and Heritage

2. Francophone
3. Group of Seven
4. 2SLGBTQ+

Gateway & Destinations

5. Gateway and Destination Communities
6. Wayfinding

International

7. International

Nature and Adventure

8. Nature and Adventure (Parks, Paddling & Trails)
9. Cycling

Touring

10. ATV
11. Auto/RV
12. Boating
13. Motorcycle
14. Rail Tours
15. Snowmobile

Misc.

16. Accessibility
17. Renewable Tourism

Product Development | Strategic Focus

02

Key Activity	Output	Outcome	Quarter	Status
b Identify new products and/or demographics/markets for existing products and support further development.				
1. Angling (\$25,000) Experience Fishing	Partnership with NOTO to develop and execute annual plan to work with operators and identified new markets for youth, women, families and new Canadians/Americans.	Increased visibility of the program with minimum 10 operators in the program.	Q1-4	Continued
2. Culture and Heritage Culinary (\$25,000) – Partner with Culinary Tourism Alliance (CTA) to grow culinary tourism opportunities. Francophone (\$5,000) – Review and enhance Balado itineraries. Indigenous Tourism Ontario (\$25,000) – identify and execute partnered initiative. 2SLGBTQ+ (\$25,000) – Undertake Northern Ontario initiative with funding from FedNor, NOHFC and partners (\$230,000 - \$110,000 FedNor, \$70,000 NOHFC, \$50,000 partners).	Partnerships with CTA, Francophone Communities, Indigenous Tourism Ontario, and Canadian Gay & Lesbian Chamber of Commerce (CGLCC) to plan and implement initiatives.	Increased capacity and increase in number of tourism products available with 8 new FeastON certifications, 6 Balado itineraries reviewed and enhanced, 1 initiative identified and completed with ITO, and for the 2SLGBTQ+ sector 25 trainers trained, 35 businesses accredited, 5 destination audits completed, 5 market, and 5 DEI sessions delivered.	Q1-4	New
3. Gateway and Destination Communities Lake Superior Northshore Tourism Plan (\$15,000). Complete Battle Island Cruise Ship Readiness Project with NOHFC funding (DNO \$5,000, CFDC \$5,000, NOHFC \$65,000).	Partnerships with Superior Country, Parks Canada, communities, and organizations to plan and execute initiatives.	Increased alignment, collaboration, and capacity with 1 partnership maintained and 1 destination development plan executed.	Q1-4	Continued
4. Nature and Adventure Cycling (\$15,000) – Lake Superior Cycling Route	Partnership with Great Lakes Waterfront Trail maintained to extend network from Sault Ste Marie to Thunder Bay.	Increase in number of tourism products in market with 1 cycling route developed.	Q1-4	Continued

Product Development | Strategic Focus

02

Key Activity	Output	Outcome	Quarter	Status
<p>4. Touring</p> <p>Cruising – Plan and execute Lake Superior Northshore Inside Passage Cruise Planner Scouting Tour with support of partners (DNO \$5,000, \$45,000).</p> <p>Cruising – Great Lakes Cruise Association Membership (\$5,000).</p> <p>Auto/RV – Review and enhance 5 Ontario itineraries (\$5,000).</p>	Partnership with Superior Country and Great Lakes Cruise Association and RV Rental Association of Canada to complete identified initiatives.	Increased alignment and coordination, increased number of cruise and/or auto/RV itineraries created or enhanced with, 6 cruise lines participating and 5 RV itineraries enhanced.	Q1-4	Continued
<p>6. Research</p> <p>Undertake research to support tourism product development and future decision making with the support of FedNor, NOHFC, and/or OMAFRA funding (DNO \$25,000, Funders \$200,000 pending applications).</p>	Successful applications to funders with research managed by Senior Coordinator with support of retained professional services.	Increased segment knowledge, capacity, and targeted programming with 1 research initiative completed.	Q1-4	New
<p>c</p> <p>Work with partners to identify strategies to increase delivery of Tourism Excellence North (TEN) training tools with the goal of introducing or augmenting market-ready products for the region (\$20,000).</p>	Partnerships created with Algoma Country, Northeastern Ontario Tourism, Sunset Country, and Superior Country.	Increased capacity through increased delivery of TEN training tools through 4 sub-regional programs and 20 market-ready products created or augmented for the region.	Q1-4	New
<p>d</p> <p>Leverage Ministry of Tourism, Culture and Sport funding through strategic partnership.</p>	Senior Coordinator in partnership manages initiatives, completes funding applications and reports.	Extended reach with minimum 4 collaborative initiatives undertaken leveraging MTCS investment by minimum of \$250,000.	Q1-4	Continued

Product Development | Strategic Focus

03 Priority Action Area

Set the foundation for improved visitor services and product quality across the region. **\$30,000.00**

Key Activity	Output	Outcome	Quarter	Status
<p>a</p> <p>Review DNO's Visitor Information Centre (VIC) Strategy and ensure better coordination among Northern Ontario VICs by supporting improved wayfinding for a minimum of 1 VIC.</p>	Strategy managed by Senior Coordinators (Product Development and WDIT) updating current strategy with support of Northern VICs. Senior Coordinator (PD) identifies opportunities for improved VIC wayfinding and executes in partnership.	Improved alignment, coordination, visitor services with, 1 strategy updated and minimum of 1 VIC wayfinding initiative completed.	Q1-4	Continued

Performance Measures

✓	Change in the number of new products and experiences and/or the number of existing products and experiences enhanced, in market.
✓	Number of product plans/strategies reviewed (minimum 5).
✓	Number of stakeholders participating (minimum 100 participants) and showing satisfaction with Destination Northern Ontario product development activities (minimum 75% satisfaction).

MTCS Budget Total \$375,000.00



02 Investment Attraction

OBJECTIVE

Killarney Mountain Lodge / Northeastern Ontario Tourism

The primary objective to guide Investment Attraction and Economic Development in Northern Ontario over the next year is:

To increase investment in the tourism industry to enhance visitor experiences.

Destination Northern Ontario established Investment Attraction & Economic Development as a key pillar in 2021, in line with the existing pillars that guide DNO's activities.

Investment Attraction is an important component of destination development with activities aiding the region as the industry recovers from the global pandemic, with a focus on business recovery, succession, and enhanced opportunities in unserved/underserved areas. With Covid seemingly in the rearview mirror as a major disruptor of day-to-day operations, the pillar can turn its attention to growth and capacity building. Under the direction of the Senior Coordinator, Investment Attraction and Economic Development, this position manages DNO's investment attraction priorities, and oversees

economic development programming in conjunction with a long-term strategic plan that fosters partnerships and collaborative efforts at the local, regional, and pan-Northern levels.

Through the lens of growth, research and capacity building will play an important role in the initiatives of 2024-25. Initiatives including travel trends, domestic market trends and U.S. travel intentions will be completed over the fiscal year to guide the regions' product development and marketing activities throughout the year and beyond. Capacity growing will be a central focus and in collaboration with municipal and regional stakeholders, increasing/leveraging resources to implement plans will be at the forefront of development initiatives.

Investment Attraction | Strategic Focus

01 Priority Action Area

Play an active role in investment attraction and economic development to Northern Ontario's tourism industry.

\$175,000.00

Key Activity	Output	Outcome	Quarter	Status
a	Monitor resources to execute planned initiatives ensuring completed, on time and on budget.	Senior Coordinator with support of Junior Coordinator completes initiatives.	Q1-4	Continued
b	Review, update, and execute DNO's Investment Attraction Strategy.	Senior Coordinator with support of Junior Coordinator completes initiative.	Q1-4	Continued
c	Implement priority recommendations from the Accommodation Gap Analysis report.	Senior Coordinator with support of Junior Coordinator completes initiative.	Q1-4	Continued
d	Engage the investment and economic development community including municipalities that have implemented or are considering implementing a Municipal Accommodation Tax.	Senior Coordinator with support of Junior Coordinator completes initiative.	Q1-4	Continued



Investment Attraction | Strategic Focus

03 Priority Action Area

Through research, increase DNO's role as a resource for Northern Ontario businesses seeking investment and for Northern Ontario's investment community.

\$50,000.00

Key Activity	Output	Outcome	Quarter	Status
a Track and communicate regional performance.	Senior Coordinator with support of Junior Coordinator aggregates performance data into report that can be shared with industry.	Increased understanding of visitor trends leading to targeted real-time programming with 4 quarterly, 1 annual regional performance report completed and communicated to industry.	Q1-4	New
b Track performance of the fixed-roof accommodations sector. Incorporate campground and parks data.	Senior Coordinator with support of staff and professional services or subscription where required completes performance tracking.	Increased understanding of visitor trends and targeted programming with 12 monthly and 1 annual urban, 1 annual rural, and 4 quarterly, 1 annual short-term rental performance reports completed.	Q1-4	Continued
c Support the Senior Coordinator, Workforce Development and Industry Training, the Ontario Tourism Innovation Lab, and regional partners to deliver sub-regional 'Spark' programs on an annual basis. Follow up mentorship with previous 'Spark' finalists.	Senior Coordinator with support of junior Coordinator assist with execution of Spark Session at Northern Ontario Tourism Summit and supports follow-up mentorships with finalists.	Increased awareness of tourism and increase in number of new experiences in the market with minimum of 3 post-session mentorships undertaken.	Q2-3	Continued
d Maintain operator database.	Junior Coordinator maintains DNO database and keeps current.	Increased capacity with 100% of entries in DNO's industry database reviewed/updated annually.	Q1-4	Continued

Investment Attraction | Strategic Focus

04 Priority Action Area

Provide support for investment into Northern Ontario tourism products and experiences through industry communication.

\$50,000.00

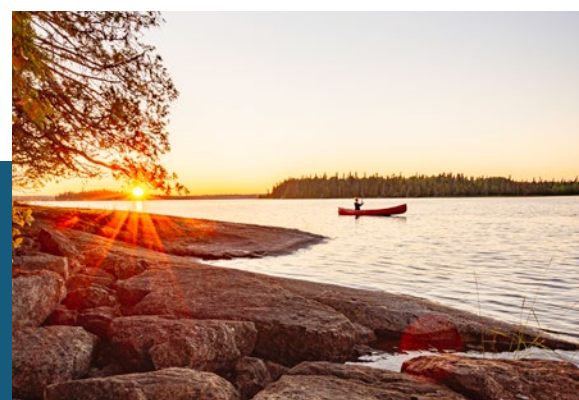
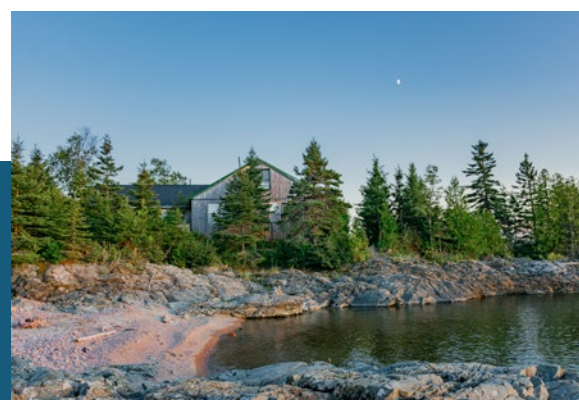
Key Activity	Output	Outcome	Quarter	Status
a Support investors and business owners including new Canadians and those "New to the North" with resources to enable them to access funding, local resources, and potential sites of investment.	Senior Coordinator with support of junior coordinator enhance DNO's investment attraction web portal and add new tools/resources.	Increased investment through increase in visits to DNO's website with 1 investment attraction portal enhanced and 2 new tools/resources available.	Q1-4	Continued
b Support Northern Ontario's tourism sector through the communication of investment news and other related information.	Senior Coordinator supported by Communications Coordinator complete initiative through newsletters, articles, and social media posts across DNO's communication channels and hosting session focused on capital funding for operators.	Increased engagement and capacity with a minimum of 15 industry-related social media posts and 12 monthly articles completed. 1 session hosted for operators.	Q1-4	Continued
c Support the sector by continuing to create and distribute podcast episodes focused on tourism investment attraction and economic development.	Senior Coordinator with the support of Communications Coordinator will complete and launch the podcasts.	Increased awareness and capacity with 4 new podcasts created and launched.	Q1-4	Continued
d Maintain regular communication with economic development stakeholders to champion tourism in economic development and municipal strategic plans for Northern Ontario communities.	Senior Coordinate participates in scheduled meetings, events, and one-on-one communications with municipal stakeholders.	Increased tourism investment with a minimum of 12 meetings/events attended.	Q1-4	Continued

Investment Attraction | Strategic Focus

05 Priority Action Area				
<p>Play an active role in enhancing the facilitation of investment attraction and economic development activities to Northern Ontario's tourism industry.</p>				\$50,000.00
Key Activity	Output	Outcome	Quarter	Status
a Support operators by facilitating succession planning, directly and/or indirectly through partnerships.	Senior Coordinator in collaboration with regional stakeholders from the investment community assist in the development and funding of succession plans.	Maintain the number of tourism business in Northern Ontario with 5 businesses supported.	Q1-4	New
b Support operators to be ready for the next crisis and be eligible for remedial support or ongoing funding programs.	Senior Coordinator to engage investment community to develop and launch a program geared to assist unincorporated tourism businesses to incorporate.	Increased vitality of the sector with more business eligible for support and funding programs with 1 target initiative launched.	Q1-4	New
c Facilitate tourism investments by providing grant writing assistance and/or providing letters of support.	Senior Coordinator works with industry proponents to complete funding applications and letters of support.	Increased investment into Northern Ontario's tourism sector with a minimum of 3 funding applications written and submitted.	Q1-4	New

Investment Attraction | Strategic Focus

05					
d	Collaborate with the Nuclear Waste Management Organization (NWMO) and regional stakeholders to develop a post-nuclear tourism strategy, should it be selected for waste storage in 2024.	Senior Coordinator in partnership with stakeholders will complete the strategy.	Increased capacity and readiness with 1 strategy completed.	Q2-4	New
e	Facilitate access to capital, with a specific focus on the tourism industry, to facilitate growth, development and succession.	Senior Coordinator will identify and undertake mentorships.	Increased investment with minimum 7 businesses mentored and 100% satisfaction.	Q1-4	New
f	Facilitate municipalities in securing multi-year funding for tourism-based economic development officers who will focus on developing local tourism initiatives and products.	Senior Coordinator will identify and work with communities to support applications.	Increased investment with minimum of 2 communities supported and securing multi-year funding.	Q1-4	New
☑ Performance Measures					
✓	Number of research initiatives successfully completed, with 100% partner satisfaction.				
✓	Increase in visitation to DNO's investment attraction tools and resources.				
✓	Number of successfully completed investment attraction outreach activities, compared to target.				
MTCS Budget Total				\$325,000.00	



03 Workforce Development & Industry Training

OBJECTIVE

Eagle Lake Island Lodge / Destination Ontario

The primary objective to guide Workforce Development & Industry Training in Northern Ontario over the next year is:

Facilitate and support the attraction, development, and retention of a tourism workforce to enhance the customer experience.

Destination Northern Ontario (DNO) continues to take a leadership role in proactively guiding Workforce Development and Industry Training for tourism operators, employers, communities and destinations, and educators in Northern Ontario through a wide variety of programs ultimately focused on enhancing visitation and the “Visitor First” experience.

Programs align with DNO's strategic plan priorities in terms of engaging the sector, identifying and addressing industry gaps, and gearing programs to recovery and growth.

Through its award-winning Tourism Excellence North (TEN) program, DNO continues to implement its five-year workforce development and industry training strategy and DNO's 2023-28 Post-Pandemic Strategic Focus, by developing and delivering enhanced and new training solutions to address skills gaps and new visitor patterns and interest, update and deliver curriculum, collaborate with partners, deliver post-training mentorship, and incorporate technology where appropriate, under the Recovery Project.

It will also continue the training and wage subsidy program through its Tourism SkillsNet North (TSNN) program to aid recovery and address the employee

skills gap and labour shortage in the industry. TSNN targets job seekers and employees with training designed to provide either entry-level skills training to allow for entry into the sector, or more advanced training for those with more experience. These training solutions will help reduce barriers to employment within the industry, as well as increase job progression and better quality of life. In addition, Tourism as a Career Awareness Campaign will continue. At the 2023 Ontario Tourism Summit, TSNN won the 2023 OTEC Workforce Innovation & Collaboration Award.

Senior Coordinator to implement key activities and action areas with the support of Online Learning Coordinator, Workforce Development Coordinator, Workforce Development & Industry Training Intern (FedNor), and TEN Industry Partners assessing staff complement as needed.

Workforce Development & Industry Training | Strategic Focus

01 Priority Action Area

Implement staffing plan and ensure provision of resources to demonstrate leadership, execute, and report on initiatives within the workforce development and industry training pillar.

\$200,000.00

Key Activity	Output	Outcome	Quarter	Status
a Ensure human, financial, and other resources in place to carry out initiatives.	Senior Coordinator will lead review, develop and implement reporting and performance monitoring process to ensure organizational excellence.	Increased accountability with 100% of planned initiatives completed on time and on budget.	Q1-4	Continued
b Review workforce development and industry training strategy and plans.	Senior Coordinator will lead review process and refresh as necessary to keep current and relevant.	Training strategy is current with 1 strategy reviewed and refreshed.	Q1-4	Continued
c Review, research and develop internal policies and identify opportunities to increase diversity, equity, inclusion, accessibility, and sustainability.	Policies and framework developed and/or updated.	Inclusive WDIT programming.	Q1-4	New



Workforce Development & Industry Training | Strategic Focus

02 Priority Action Area

Work with partners to address the labour market shortage and skills gaps across the region and province through the delivery of an enhanced multi-year and multi-faceted plan of the **Tourism SkillsNet North** program.

\$100,000.00

Key Activity	Output	Outcome	Quarter	Status	
a	Work in collaboration with Nature and Outdoor Tourism Ontario (NOTO), Ontario Tourism Education Corporation (OTEC) to plan and deliver a 3-Year program to recruit, train and match job seekers/participants with available job opportunities through an Ontario Skills Development Fund application via the Ministry of Labour, Immigration, Training and Skills Development for RTO's 13, 7 and 9.	Labour gap addressed with, 1 application submitted with, 625 job seekers recruited and trained. 115 employers recruited. 600 jobseekers matched to employers and subsidized. Budgets leveraged by \$2.4 million.	Q1-4	Continued	
b	Use recent tourism workforce labour gaps to inform programming for RTO's 13, 7 and 9.	TSNN Management Team	Training strategy is current with 1 strategy reviewed and refreshed.	Q1-4	Continued
c	Continue to foster partnerships to expand delivery and reach.	Partnerships with educational organizations, community employment training programs and industry.	Greater alignment with minimum 6 partnerships created or maintained.	Q1-4	Continued
d	Implement a Tourism as a Career Awareness Campaign including a 'Tourism Rocks' Toolkit.	TSSN management team overseas initiative with support from DNO communications team with 1 Toolkit updated and 1 multi-media campaign developed.	Increased awareness of tourism as a career with 1 Toolkit updated and distributed digitally. Develop and execute 1 multi-media campaign.	Q1-4	Continued
e	Ongoing performance monitoring and assessment.	TSNN management team monitors and reports on initiative with support from DNO administration.	Increased accountability with 100% Ministry and management reports completed and on-time.	Q1-4	Continued

Workforce Development & Industry Training | Strategic Focus

03 Priority Action Area

Work with partners to develop and deliver priority training that addresses industry skill gaps, builds capacity, and aligns with priority product development goals through the **Tourism Excellence North** program.

\$110,000.00

Key Activity	Output	Outcome	Quarter	Status	
a	Continue to engage Brokers, DNO Product Teams and Training Specialists in an ongoing collaborative process.	Senior Coordinator to execute initiative.	Enhanced programming with minimum of 60 participants engaged through 3 outreach sessions.	Q1-4	Continued
b	Collaborate and develop partnerships with organizations already delivering or positioned to deliver training that supports increased capacity or excellence for Northern Ontario's (operators, destinations and/or communities) priority sectors in-person or online.	Senior Coordinator will engage education facilities, community development agencies and tourism organizations to execute initiative.	Increased alignment and quality tourism products in market or tourism plans developed, increased uptake and increased capacity with 4 organizations engaged and a minimum 2 workshops delivered to 24 participants.	Q1-4	Continued
c	Deliver enhanced Fast Track to Success coaching tool that includes elements relevant to product priority sectors.	Executed by Training Specialists.	Increased visitor appeal with minimum of 10 mentorships executed.	Q1-4	Continued
d	Deliver training opportunities at annual Northern Ontario Tourism Summit.	Partner with industry organizations and/or professional services to execute.	Increased capacity with minimum 12 training sessions developed and delivered to 250 participants.	Q1-3	Continued
e	Deliver one Best Practices Mission (BPM) and research a future Best Practices Mission.	Senior Coordinator to manage with the support of TEN Training Specialists.	Increased capacity through minimum of 1 BPM executed with 12 participants and 1 future BPM identified and researched.	Q1-4	Continued
f	Develop and deliver webinars as part of the ADAPT 2020: A Webinar Series for Tourism with a focus on post COVID-19 pandemic and recovery.	Partner with industry organizations and/or professional services to execute.	Increased capacity with 2 webinars developed and delivered to 60 participants.	Q1-4	Continued
g	Research and identify a five-star rating system to grade tourism businesses on product, service, or experience on a scale of 1 to 5 starting with delivery options and determine final option.	Senior Coordinator to engage professional services.	Standardized ratings to enhance future participation in DNO training activities with 1 report produced.	Q1-4	New

Workforce Development & Industry Training | Strategic Focus

03				
Key Activity	Output	Outcome	Quarter	Status
h Enhance and support improved visitor services, visitor experiences and DNO pillar activities.	Senior Coordinator to work with VICS to develop and execute digital visitor surveys.	Improved visitor knowledge through the completion of a minimum of 500 surveys.	Q1-2	Continued
i Foster a culture of excellence among visitor service ambassadors through training opportunities.	Senior Coordinator to execute in partnership with VICS on-line regional awareness, sub-regional awareness, and service excellence training.	Improved visitor services and regional awareness through development and delivery of training to a minimum of 30 participants.	Q1-2	Continued
j Leverage opportunities through other pillar programming and partnerships to maintain a superior standard for visitor services and product quality.	Senior Coordinators communicate and collaborate across all pillar areas.	Improved alignment within the pillars with a minimum of 26 meetings held.	Q1-4	New
k Deliver post-training resources.	WDIT staff supplies post-training resources to participants based on session.	Increased effectiveness with post-training resources provided to a minimum of 60 participants.	Q1-4	Continued



Workforce Development & Industry Training | Strategic Focus

04 Priority Action Area				
<p>Continue to develop and deliver enhanced and new training opportunities and mentorships, as a response to the COVID-19 pandemic to aid in recovery and resiliency through the Recovery Program. Also, continue to develop and deliver strategies to increase awareness, engagement and enrollment in Destination Northern Ontario and partner training including strategies for accreditation. Training will be delivered through Tourism Excellence North (TEN).</p>				\$90,000.00
Key Activity	Output	Outcome	Quarter	Status
a Implement and deliver new approaches to assessment, peer-to-peer training, online learning, self-directed training and the use of technology to enhance learning and skill development including the use of course badges and/or digital certificates awarded based on a set of criteria and displayed in the user's profile. The course badge/certificate will be awarded for completing a course by TEN.	Managed by Senior Coordinator with the support of WDIT pillar team.	Increased industry participation and capacity with 1 updated and enhanced web portal, 1 new learning management system and 1 new customer relationship management system. Enhanced self-assessment uptake with 50 participants.	Q1-4	Continued
b Continue to enable WDIT staff to research, identify and participate in training on the development and incorporation of online courses, web-based workshops and self-directed training.	WDIT staff completes training.	Enhanced and innovative WDIT programming development and delivery with staff attending a minimum of 2 external training opportunities that target adult learning development and delivery.	Q1-4	Continued



Workforce Development & Industry Training | Strategic Focus

Key Activity	Output	Outcome	Quarter	Status
c Continue to develop and deliver enhanced and new curriculum/content for online learning, self-learning, group learning, personalized and/or mentorship training solutions that targets recovery, resiliency, and growth.	WDIT staff with support of professional services and TEN training specialists develops and delivers training.	Increased capacity with the development and delivery of: <ul style="list-style-type: none"> • 12 employability/soft core skill gap courses with 300 participants. • 1 community workshop with 24 participants. • 6 ADAPT training webinars and podcasts with 100 participants. • 12 mentorship sessions targeting 30 operators. 	Q1-4	Continued
d Develop and implement a post-training mentorship program to training participants in coordination with the Investment Attraction pillar.	Managed by Senior Coordinators.	Increased future industry capacity with the development of 1 post-training mentorship plan.	Q1-4	New
e Continue to develop a series of enhanced and new bilingual tools and training modules that could include certifications for completion through TEN's new training portal.	Managed by Senior Coordinator with contracted francophone translation services.	Increased support to francophone tourism operators with 5 of the self-assessments newly designed.	Q1-4	Continued



Workforce Development & Industry Training | Strategic Focus

Key Activity	Output	Outcome	Quarter	Status
f Create and publish an annual calendar of training opportunities across Northern Ontario, including those offered by other organizations, accessible online for the public (monthly or bi-monthly updates).	Managed by Senior Coordinator with support of WDIT pillar team.	Increased awareness and participation in DNO training activities with 1 calendar of training maintained, continuously updated, and published.	Q1-4	Continued
g Continue to foster partnerships to expand delivery and reach.	Partnerships with educational organizations and industry training programs.	Greater alignment with minimum 2 partnerships created or maintained.	Q1-4	Continued
h Implement a marketing and communication plan for TEN.	Senior Coordinator to work with DNO communications team to develop and execute.	Increased participation in DNO training activities with 1 marketing and communication plan developed and executed.	Q1-4	New

☑	Performance Measures
✓	Number and % change in stakeholders reporting business/customer improvements as a result of Destination Northern Ontario workforce development and industry training activities compared to target (300).
✓	Number % change in stakeholders participating in (400 participants) and showing satisfaction with Destination Northern Ontario workforce development and industry training activities compared to target (300 or 75%).
✓	Percentage of initiatives completed compared to target (100% of planned workforce development and industry training activities).
✓	Employment numbers for tourism (*from reporting guide).

MTCS Budget Total \$500,000.00



04 Marketing & Communications

OBJECTIVE

📍 Aguasabon River – Marathon / Destination Northern Ontario

The primary objective to guide Marketing in Northern Ontario over the next year is:

To increase awareness of Northern Ontario as a travel destination and increase conversion in target markets.

In the pursuit of elevating tourism receipts in Northern Ontario for the fiscal year 2024-25, Destination Northern Ontario is set to adapt its strategies in response to new travel insights and trends emerging in Ontario.

The overarching goal remains to increase receipts to 10% of the overall spend in the province, emphasizing the need to continuously innovate marketing approaches.

The consumer marketing approach will continue with a dual focus, categorized into "Defend and Maintain" and "Rise and Shine." The former targets existing consumers through traditional travel corridors, ensuring proven return on investment and visitation. Simultaneously, the latter explores emerging markets such as soft outdoors and touring experiences to diversify spending in the region.

Recognizing the crucial role of international markets, Destination Northern Ontario aims to leverage their potential, considering the

significantly higher return on investment from international visitors. Pan-Northern marketing tools, including the Northern Ontario Trip Planner, will continue to be developed as integral components of itinerary planning for the region.

E-commerce platforms will be further emphasized, promoting seamless path-to-purchase to increase direct sales. Collaborating with industry partners, the organization will support the evolution of these platforms to enhance the consumer experience.

Aligning with provincial strategies, Destination Northern Ontario will revise its three-year digital strategy and collaboratively create a new Northern Ontario Tourism Marketing Strategy in partnership with Destination Ontario. These documents will serve as guides for marketing activities, ensuring adaptability to the evolving tourism landscape.

In terms of communications, the organization has refined its approach over the past five years, tailoring content for three key audience streams: government and economic development professionals, tourism operators and owners, and municipalities and communities. The 2024-25 Communications Strategy, developed through the lens of the 2024-25 Industry Digital Strategy, aims to provide a consolidated approach for consistent and clear messaging. By integrating the following considerations into its strategy for the 2024-25 fiscal year, Destination Northern Ontario can capitalize on new travel insights and trends, ensuring a vibrant and resilient tourism sector for the region.

To further enhance the strategy for the upcoming fiscal year:

Data-Driven Insights:

Leverage the latest travel data and analytics to gain insights into evolving consumer behaviors, preferences, and emerging travel trends in Ontario.

Sustainable Tourism:

Emphasize Northern Ontario's commitment to sustainable tourism practices in line with the growing global emphasis on responsible travel.

Community Engagement:

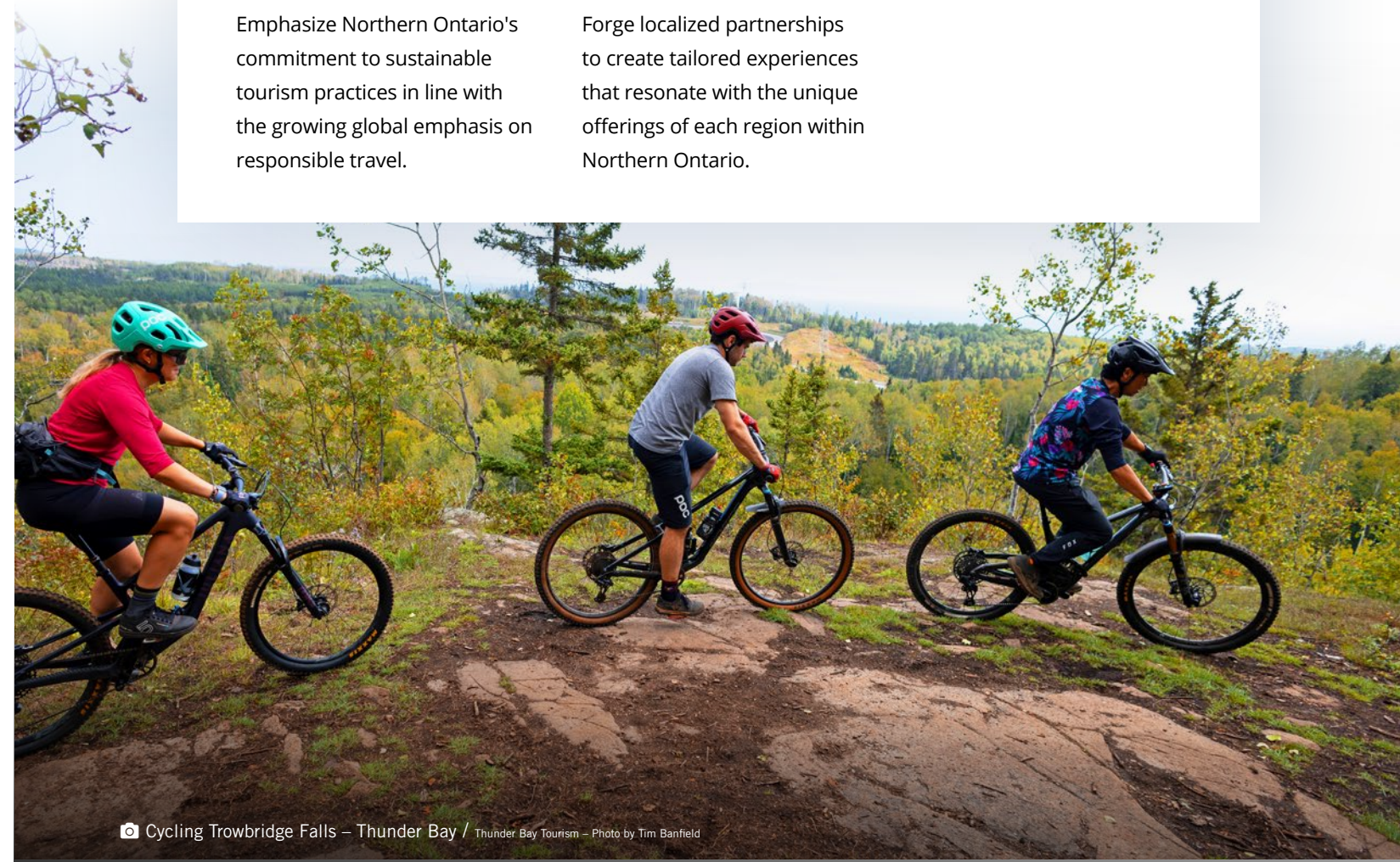
Strengthen ties with local communities, ensuring that tourism development aligns with community values and fosters a positive impact.

Localized Partnerships:

Forge localized partnerships to create tailored experiences that resonate with the unique offerings of each region within Northern Ontario.

Innovative Digital Presence:

Stay at the forefront of digital trends, including immersive technologies and virtual experiences, to enhance engagement with a digitally savvy audience.



📍 Cycling Trowbridge Falls – Thunder Bay / Thunder Bay Tourism – Photo by Tim Banfield

Marketing & Communications | Strategic Focus

01 Priority Action Area					
Implement Strategic Direction for Marketing Tourism in Northern Ontario in partnership with Destination Ontario, Destination Marketing Organizations and other industry stakeholders which supports a pan-Northern approach to marketing the region as a destination of choice.				\$175,000.00	
Key Activity	Output	Outcome	Quarter	Status	
a	Monitor resources to execute planned initiatives ensuring completed, on time and on budget.	Senior Coordinator with support of staff executes initiatives.	Increased accountability with 100% of planned initiatives completed, on-time and on-budget.	Q1-4	Continued
b	Implement Year 2 recommendations in industry and consumer digital strategies.	Senior Coordinator with support of staff executes initiatives.	Increased productivity, alignment and coordination with 2 strategies implemented.	Q1-4	Continued
c	Refresh and implement in partnership a renewed Northern Ontario tourism marketing strategy.	Senior Coordinator, on behalf of DNO, works with Destination Ontario and industry partners and DMOs to complete initiative.	Increased effectiveness of marketing with greater alignment and coordination with 1 Northern Ontario tourism marketing strategy refreshed and executed.	Q1-4	Continued
d	In response to current and historical trends in visitation developed in partnership with industry, a renewed vision and long-term framework to market Northern Ontario's unique tourism products and experiences.	Senior Coordinator with support of staff and professional services engages industry to develop a renewed marketing framework for future marketing.	Over the longer term we would expect to see an increase in visitation and spend with 1 new marketing framework developed and implemented.	Q1-4	New



Marketing & Communications | Strategic Focus

02 Priority Action Area					
Enhance Destination Northern Ontario's role as a resource by supporting tourism businesses and organizations with customized marketing tools and research that will increase collaboration, awareness, distribution, conversion, performance, and tracking.				\$350,000.00	
Key Activity	Output	Outcome	Quarter	Status	
a	Support increase e-commerce activities within the region.	Senior Coordinator works with industry partners to execute initiative.	Increase in number of tourism products available for purchase on-line with a minimum of 25 operators participating, generating a minimum of \$1 million in sales.	Q1-4	Continued
b	Continue to grow and enhance NorthernOntario.travel as the primary consumer facing website for Northern Ontario.	Senior Coordinator with support of staff and professional services completes initiative.	Increased awareness of Northern Ontario as a destination with a minimum 3 million visits and minimum 750K referrals to partners. Increased alignment and performance with minimum 75% targets and KPIs aligned with digital strategy.	Q1-4	Continued
c	Continue to grow and make available Northern Ontario collective digital asset library with compelling and relevant photography and videography.	Senior Coordinator with support of staff and working with industry partners completes initiative.	Increased industry alignment, coordination with 1 digital asset management system maintained and assets increased by a minimum of 15% YoY.	Q1-4	Continued
d	Work with DMOs within the region to gain a better understanding of marketing tactics, performance, and outcomes.	Senior Coordinator with support of staff and working industry partners completes the initiative.	Increased understanding with a minimum of 4 marketing performance templates developed and completed.	Q1-4	Continued
e	Undertake consumer and market research to gain a better understanding of current travel trends and motivators as they related to Northern Ontario's tourism products and experiences.	Senior Coordinator with support of staff and professional services, and funding through FedNor executes and completes consumer and market research initiatives.	Greater understanding, more targeted and effective marketing, and over the longer-term increased visitation with a minimum of 2 consumer surveys and 1 market research initiative completed.	Q1-4	Continued

Marketing & Communications | Strategic Focus

03 Priority Action Area

Continue to develop and coordinate marketing initiatives that position Northern Ontario as a destination of choice through leveraged investments, efforts, and partnerships, to increase conversions and to grow visitation and yield featuring priority tourism products and experiences.

\$1,100,000.00

Key Activity	Output	Outcome	Quarter	Status
a Continue to procure new content and maintain/enhance existing regional and sub-regional content on Northern Ontario.	Senior Coordinator with support of staff and professional services and working with partners completes initiative.	Increased sub-regional awareness with 100 new stories/itineraries uploaded, minimum of 1.5 million visits, 500K referrals, at a cost per visit of 50 cents.	Q1-4	Continued
b Increase awareness of Northern Ontario as a destination of choice through development and execution of collaborative regional campaigns promoting best-bet products to new markets (Inspire & Grow).	Senior Coordinator with support of staff and partners completes the initiative.	Increased awareness with a minimum of 6 campaigns executed with 10 partners and with performance measured by traditional marketing KPIs.	Q1-4	New
c Increase awareness of Northern Ontario as a destination of choice through development and execution of collaborative sub-regional campaigns promoting best-bet products to existing markets (Defend and Maintain).	Senior Coordinator with support of staff and partners completes the initiative.	Increased awareness and alignment with a minimum of 4 campaigns executed with 4 partners with a 60/40 content split grow vs maintain and performance measured by traditional marketing KPIs.	Q1-4	Continued
d Marketing campaigns are executed in alignment with Destination Ontario.	Senior Coordinator with support of staff, working with partners and Destination Ontario to complete initiative.	Greater alignment, collaboration and amplification of provincial branding with minimum of 50% marketing efforts aligned with PMO.	Q1-4	Continued
e Grow destination awareness through product and familiarization tours.	Senior Coordinator with support of staff, working with partners including Destination Ontario complete the initiative.	Increased awareness with minimum of 8 tours executed and featuring priority products, experiences and destinations and resulting earned media or product placement.	Q1-4	Continued

Marketing & Communications | Strategic Focus

04 Priority Action Area

To increase engagement within the tourism sector, increase awareness of Destination Northern Ontario initiatives and promote the positive impacts of tourism.

\$75,000.00

Key Activity	Output	Outcome	Quarter	Status
a Maintain and enhance Destination Northern Ontario's Media Relations Kit and utilize as DNO maintains and executes annual Communications Plan in alignment with 2023-25 Industry Digital Strategy.	Senior Coordinator with support of Communications Coordinator executes initiative.	Increased awareness and appreciation of Northern Ontario's tourism sector with 1 media relations kit maintained/enhanced and 1 annual communications plan executed.	Q1-4	Continued
b Ensure consistent usage of organizational and Ministry styles, logos, and recognition guidelines.	Senior Coordinator with support of Communications Coordinator executes initiative.	Increased awareness of DNO and MTCS investments and amplification of provincial branding with 100% compliance of recognition guidelines.	Q1-4	Continued
c Engage Northern Ontario's tourism sector through a variety of channels including: • Social Media, • Websites, • Newsletters • Direct Mail	Senior Coordinator with support of Communications Coordinator executes initiative through DNO's communications and social media plans.	Increased sector engagement and awareness of DNO and partner tourism programming with, 10% YoY increase in social media engagement, increase of 10% YoY in website traffic, 1 industry event calendar maintained and published, and review/update of 25% of resources available online, minimum of 12 monthly digital newsletters, and 1 direct mail campaign.	Q1-4	Continued
d Identify ways to increase engagement with the Francophone, Indigenous, and 2SLGBTQ+ sectors.	Senior Coordinator with support of Communications Coordinator and engaging SEO, ITO and CGLCC executes initiative.	Increased engagement and partnership with minimum 1 strategy developed, and execution initiated.	Q1-4	New
e Destination Northern Ontario board and staff attends industry events and opportunities to raise the profile of the organization and sector.	Board and Staff represent DNO at industry and other functions and/or events.	Greater awareness of DNO programming and sector activities/contribution to the economy with minimum 6 events attended with minimum 2 industry awards annually.	Q1-4	Continued
f Engage industry to assess awareness and satisfaction of DNO programs and initiatives.	Senior Coordinator with support of Communications Coordinator completes initiative.	Greater participation and relevance in DNO programming with minimum of 1 annual survey taken and 75% industry satisfaction.	Q4	Continued

Performance Measures

- ✓ Increase % in web traffic, direct bookings, completed media fams and leveraged marketing efforts from partners.
- ✓ Change in number of partners participating and satisfaction in marketing and communications programs.
- ✓ Percentage of initiatives completed compared to target (100%)

MTCS Budget Total

\$1,700,000.00

05 Partnership

OBJECTIVE

📍 Pancake Bay Provincial Park – Lake Superior / Colin Field

The primary objective to guide Partnership Initiatives in Northern Ontario over the next year is:

To become a catalyst in building strategic alignment and promoting collaboration within the industry.

Partnership initiatives are identified, framed, and managed by the Senior Coordinators within their pillar areas, Product Development, Investment Attraction, Workforce Development and Industry Training, and Marketing.

Initiatives are selected based on potential outcomes and alignment with priorities set out in DNO's strategic and annualized business plans reflecting all pillar areas. The DNO Board of Directors has set a goal of 50% of initiatives are in non-marketing pillars.

As more operators complete DNO's training through the Tourism Excellence North program a new priority has been set to execute more partnerships with industry operators to support their completion of training and mentorship recommendations.



Partnership | Strategic Focus

01 Priority Action Area

Continue to build long-term relationships with industry partners, focus on projects that show progression beyond marketing, and leverage available partnership funding.

Key Activity	Output	Outcome	Quarter	Status	
a	Implement staffing plan and monitor resources to execute planned initiatives ensuring completed, on time and on budget.	Senior Coordinators engage stakeholders, identify, frame, and manage partnered initiatives that reflect mandated pillars.	Increased tourism programming, opportunities, awareness, and engagement with, minimum 75 partners engaged in minimum 9 partnership projects. Minimum 50% of partnership budget reflects product development, investment attraction and workforce/ training pillars. Minimum of \$1,210,000 leveraged.	Q1-4	Continued

02 Priority Action Area

Work with partners to identify and undertake strategic partnerships focusing on tourism product development that will assist Northern Ontario's tourism sector recover and/or grow with an emphasis on strategic plan development and implementation.

\$150,000.00

Key Activity	Output	Outcome	Quarter	Status	
a	Identify and undertake partnerships to grow tourism through strategic planning and/or implement strategic or other tourism plans.	Senior Coordinator in collaboration with sector partner(s) manages initiatives through to completion.	Increased tourism collaboration, planning and programming with minimum of 4 partners engaged.	Q1-4	Continued
b	Identify and undertake partnered initiatives with sector operators to develop, increase number of and diversity of Northern Ontario accommodation options. – minimum 2 partners	Senior Coordinator in collaboration with industry partner(s) manages initiatives through to completion.	Increase in diversity and availability of accommodations with a minimum of 2 operators engaged.	Q1-4	New
c	Identify and undertake partnered initiatives with communities and/or trails organizations to improve wayfinding.	Senior Coordinator in collaboration with sector partner(s) manages initiatives through to completion.	Increased capacity and improved wayfinding with minimum of 2 partner communities or trails organizations engaged.	Q1-4	Continued

Partnership | Strategic Focus

03 Priority Action Area

Work with partners to identify and undertake strategic partnerships focusing on tourism investment attraction that will promote the value of tourism and projects that will assist operators recover and grow.

\$50,000.00

Key Activity	Output	Outcome	Quarter	Status
a Identify and undertake a partnered initiative to promote the value of tourism through a Tourism Rocks Awareness campaign(s).	Senior Coordinator in collaboration with sector partner(s) manages initiatives through to completion.	Increased awareness of the importance of tourism to the Northern economy with minimum 1 campaign planned and executed with performance measured through standard marketing KPIs.	Q1-4	Continued
b Build operator capacity and ensure long-term sustainability and vitality of the sector through partnered initiatives to facilitate succession and incorporation of tourism businesses.	Senior Coordinator in collaboration with industry partner(s) manages initiatives through to completion.	Increased capacity and long-term sustainability with minimum 5 businesses partnering.	Q1-4	New

04 Priority Action Area

Work with partners to identify and undertake strategic partnerships focusing on tourism workforce development and industry training that will assist Northern Ontario's tourism sector recover and grow with an emphasis on initiatives that focus on labour or training gaps.

\$50,000.00

Key Activity	Output	Outcome	Quarter	Status
a Deliver industry training through plenary and break-out sessions at the annual Northern Ontario Tourism Summit (NOTS).	Senior Coordinator in collaboration with training partner(s) manages initiatives through to completion at NOTS.	Increased capacity within the sector with a minimum of 250 operators completing training at a minimum of 12 plenary or break-out sessions.	Q3	Continued

Partnership | Strategic Focus

05 Priority Action Area

Work with partners to identify and undertake strategic partnerships focusing on tourism marketing that will assist Northern Ontario's tourism sector recover and grow.

\$355,000.00

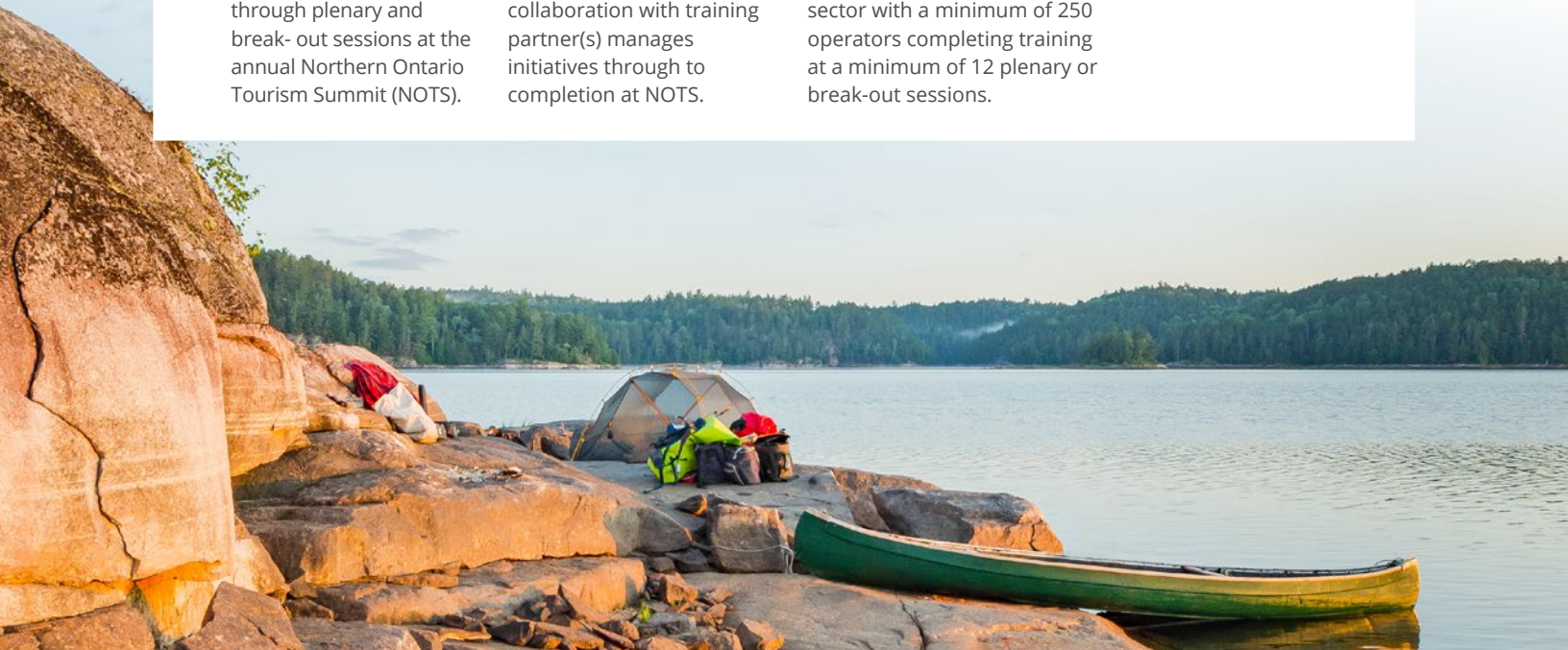
Key Activity	Output	Outcome	Quarter	Status
a Identify, plan, and execute marketing partnerships that focus on Destination Northern Ontario's Inspire and Grow markets.	Senior Coordinator in collaboration with sector partner(s) manages initiatives through to completion.	Increased destination awareness with a minimum of 4 collaborative partnerships executed and measured with standard marketing KPIs.	Q1-4	Continued
b Identify, plan, and execute marketing partnerships that focus on Destination Northern Ontario's Defend and Maintain markets.	Senior Coordinator in collaboration with sector partner(s) manages initiatives through to completion.	Increased destination awareness with a minimum of 8 collaborative partnerships executed and measured with standard marketing KPIs.	Q1-4	Continued
c Identify, plan, and execute co-op marketing partnerships with industry operators who have participated in and enacted recommendations made as a part of TEN's Fast Track program and have enacted recommendations that focus on Destination Northern Ontario's priority markets.	Senior Coordinator in collaboration with industry partner(s) manages initiatives through to completion.	Increased destination awareness with a minimum of 4 collaborative partnerships executed and measured with standard marketing KPIs.	Q1-4	Continued

☑ Performance Measures

- ✓ Maintain a minimum of 75 individual partners with 100% satisfaction in partnership activities.
- ✓ 100% partnerships completed on time.
- ✓ Leverage \$2 for every \$1 partnership allocation (matching, non-matching, and in-kind contributions).
- ✓ Minimum 50% MTCS partnership allocation going to non-marketing partnerships.

MTCS Budget Total

\$605,000.00



Risk Management

Destination Northern Ontario has had a formalized risk management plan in place since 2020. Building off of this plan, the organization has continued to add levels of mitigation as risks have been identified through a its process and policy.

It is expected that staff will maintain a high level of professionalism in the performance of their duties. The Executive Director, in consultation with the Board, will ensure that the staff complement is adequate and that staff members have the skill sets and competencies to carry out their work. Where warranted, Destination Northern Ontario may also contract independent contractors for specific tasks through a fair and transparent procurement process.

Destination Northern Ontario's Board of Directors is committed to ensuring that they uphold a high level of professionalism and integrity with a "zero tolerance" policy for any perceived or actual conflict of interest. In addition, financial audits are conducted annually, ensuring that funds are used appropriately and according to the terms of the Transfer Payment Agreement with His Majesty.

Additionally, Destination Northern Ontario completes comprehensive risk assessment plans for all projects over the total cost of \$50,000 to ensure risks are identified and analyzed before commencement of activities. This helps the organization through conversations with partners as it relates to potential shared risk and challenges on individual projects.

Finally, the availability of financial resources to carry out the initiatives outlined in this plan are of high importance. Considering this, Destination Northern Ontario is committed to meeting the reporting deadlines that are milestones in the payment schedule. In rare instances where financial gaps need to be bridged, Destination Northern Ontario has negotiated a substantial line of credit with its financial institution.

DESTINATION NORTHERN ONTARIO'S Senior Management Team



Marty Kalagian
President

Marty is a retired Staff Sergeant, Niagara Regional Police after a 35-year career. Following his retirement and their love of Northern Ontario, he and his wife Marilyn bought and operated Mountainview Lodge, near Searchmont Ontario for eight years. Marty has been with Destination Northern Ontario since its inception through transition to the present Board and has accepted the position of President and Chair. He was also a 3-time elected member of Searchmont Local Services Board and a member of Sault North Waste Management Council. Marty & Marilyn are the proud parents of two sons and are thoroughly enjoying their role as grandparents.



David MacLachlan
Executive Director

In 2013 David became the Executive Director for Destination Northern Ontario. David grew up in the tourism industry and is third generation to work in the family tourism business started 65 years ago by his grandfather. David is also a past chair of the Algoma Kinniwabi Travel Association, OTMPC Northern Tourism Marketing Committee and sat on the Board of Directors for OTMPC. David and Destination Northern Ontario have received numerous awards over the years and most recently two Ontario Tourism Awards of Excellence at the Ontario Tourism Summit in 2023.



Stephanie Hopkin
Senior Coordinator – Product Development, Marketing & Communications

After finishing a degree in technical writing and literature at the University of Western Ontario, Stephanie moved from Southern Ontario to her hometown of Sault Ste. Marie to begin a career with the Ministry of Natural Resources. She then moved into the role of public relations and communications coordinator in the Mayor's Office of Sault Ste. Marie. Stephanie joined Destination Northern Ontario in 2015 where she continues to coordinate and administer local and pan-northern marketing initiatives worth approximately three million dollars annually as Senior Coordinator Product Development and Marketing & Communications. She currently sits as a director for Sault Ste. Marie's Community Development Corporation, as treasurer for the Economic Developers Council of Ontario and chair of both the District of Sault Ste. Marie's Social Service Administration Board and its Housing Corporation.



Karen Peacock
Senior Coordinator – Workforce Development & Industry Training

Karen Peacock, Senior Coordinator of Workforce Development and Industry training enthusiastically began her role in November of 2015. Karen is responsible for coordinating and launching two award winning programs. The first, Tourism Excellence North, a pilot program that is a suite of tourism training solutions for use by tourism operators, communities, and destinations across Northern Ontario, now the foundation of Destination Northern Ontario's industry training and workforce development pillar. The second, Tourism SkillsNet North, addresses labour shortages and skills gaps in Northern Ontario. Karen has spent her 25-plus year career in the not-for-profit industry. Her last position before joining Destination Northern Ontario was as Executive Director at the Art Gallery of Sudbury. Karen lives in the City of Greater Sudbury.



Gord Knowles
Senior Coordinator – Investment Attraction & Economic Development

Gord Knowles (Ec.D) is the Senior Coordinator of Investment Attraction and Economic Development for Destination Northern Ontario. Previously, he worked for more than a decade as a general manager and senior loans officer at two northern Ontario-based Community Futures Development Corporations. Gord proudly served as the Economic Developers Council of Ontario's 57th President and has been a member of the Board since 2016. In 2022 he was elected to be a Municipal Counsellor in the Town of Atikokan; additionally, he sits on the Board of the Atikokan Economic Development Corporation, as the Treasurer of Atikokan Health and Community Services, and on TIAC's Investment Readiness committee.



Bobbi-Lynn Pallot
Corporate Services Officer

Bobbi-Lynn Pallot is the Corporate Services Officer at Destination Northern Ontario (RTO13). As the CSO she has re-developed certain internal policies and procedures. Among her priorities is the Health and Safety of our employees, she has developed and implemented Health and Safety Policies and works with a small Health and Safety team to make sure DNO is a safe and regulatory compliant workspace. In 2023 Bobbi received "Certified Practitioner" certification from the Society of Human Resources (SHRM) International Status, she is a current member. Bobbi also holds a degree in Advertising and Graphic Design. In her free time, she enjoys spending it with her family and furry friends outside by the backyard pool.

Financial Plan



Destination Northern Ontario is funded by the Ministry of Tourism, Culture and Sport. Regional Tourism Organizations (RTO's) receive a core allocation consisting of a base amount based on performance compared to provincial fixed roof accommodation tourism receipts. There is also a partnership allocation that matches partner contributions from non-Provincial government sources.

Destination Northern Ontario's budget includes an allocation for pan-Northern Ontario initiatives as well as individual allocations to each of the three sub-regions.

APRIL 1, 2024 - MARCH 31, 2025

Governance & Administration

Salaries and Benefits	\$	225,235.00
Governance	\$	50,000.00
Overhead & Facilities	\$	50,000.00
Finance & Administration	\$	50,000.00
Travel	\$	25,000.00
Industry Relations	\$	15,000.00
Information Technology	\$	10,000.00
Subtotal	\$	425,235.00

Product Development

Salaries, Benefits and Coordination	\$	145,000.00
Priority Products and Experiences	\$	200,000.00
Improved Visitor Services	\$	30,000.00
Subtotal	\$	375,000.00

Investment Attraction

Salaries, Benefits and Coordination	\$	175,000.00
Research	\$	50,000.00
Support Resources	\$	50,000.00
Facilitate Initiatives	\$	50,000.00
Subtotal	\$	325,000.00

Workforce Development & Industry Training

Salaries, Benefits and Coordination	\$	200,000.00
Tourism SkillsNet North (SDF)	\$	100,000.00
Tourism Excellence North	\$	110,000.00
Recovery Program	\$	90,000.00
Subtotal	\$	500,000.00

Marketing & Communications

Salaries, Benefits and Coordination	\$	175,000.00
Marketing Tools	\$	295,000.00
Research	\$	25,000.00
Northern Ontario Destination Marketing	\$	200,000.00
Sub-Regional Destination Marketing	\$	900,000.00
Communications & Stakeholder Engagement	\$	105,000.00
Subtotal	\$	1,700,000.00

Partnerships

Product Development	\$	150,000.00
Investment Attraction	\$	50,000.00
Workforce Development & Industry Training	\$	50,000.00
Marketing	\$	355,000.00
Subtotal	\$	605,000.00

2024-2025 Budget Total

Total \$ 3,930,235.00



- > **Destination Northern Ontario** / destinationnorthernontario.ca
- > **Tourism Excellence North** / tourismexcellencenorth.ca
- > **Domestic Marketing** / northernontario.travel
- > **International Travel Trade** / northernontarioitt.com



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