



destinationnorthernontario.ca

2023-28

Post-Pandemic Strategic Focus

Ontario 



2023-28 Post-Pandemic Strategic Focus

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GLOSSARY OF ACRONYMS

CMA	Census Metropolitan Areas
CBRE	CBRE Group (consulting firm)
DMO	Destination Marketing Organization
DNO	Destination Northern Ontario
FAM	Familiarization Tour
IA	Investment Attraction
KPI	Key Performance Indicator
MTCS	Ministry of Tourism Culture & Sport
NOHFC	Northern Ontario Heritage Fund Corporation
NOTO	Nature & Outdoor Tourism Ontario
PMO	Provincial Marketing Organization
Q	Quarter
RBT	Resource Based Tourism
RTO	Regional Tourism Organization
SEP	Summer Employment Program
SIP	Strategic Implementation Plan
TEN	Tourism Excellence North
TIC	Travel Information Centre
TNO	Tourism Northern Ontario
TSRC	Travel Survey of Residents Canada
VFR	Visiting Friends & Relatives

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Message from the Board of Directors

We are now entering the fourth year of the global pandemic and I'm sure nobody thought we would be talking about Covid-19 in 2023. Yet here we are.

We know tourism was hit first, the hardest, and will take the longest to recover but as we can now see from statistics that are coming in from 2022 some sectors have made a significant recovery and we are seeing sectors who are now performing above 2019 even accounting for recent high inflation. With the removal of the last border restrictions, we anticipate a bounce back for those operators who depend on the US market.

For those specific sectors who are still experiencing challenges related to the pandemic, Destination Northern Ontario along with other government ministries, agencies and organizations continue to offer programming to mitigate those impacts.

But for most of us it is now time to look ahead and plan for our future success. We need to grow, develop, and implement strategies that will cement Northern Ontario as a preferred destination in more diversified markets. It's about enhancing existing products and experiences where we perform well, and offering new products and experiences where we underperform, as well as addressing systemic challenges that are holding us back, like transportation, supply chain issues and the lack of visitor services including year-round availability of restrooms.

It's going to be very competitive as global destinations scale up. The destinations that overcome challenge, take advantage of their unique assets, and successfully promote themselves will do well.

Northern Ontario is well-poised in a post-pandemic world, and I hope you will join us as we work together to grow tourism in the North.

Marty Kalagian,

PRESIDENT | DESTINATION NORTHERN ONTARIO

On behalf of Destination Northern Ontario's Board of Directors



Introduction

In each of the first three decades of the 21st century, there have been major global events that have impacted the tourism industry. SARS had limited impacts in Northern Ontario. The Great Recession precipitated by a housing financial crisis in the U.S.A. saw visitation from that nation down 60-70%. More recently, the global Covid-19 pandemic saw the tourism industry hit first and hardest, and it is generally acknowledged that the sector will be the longest to fully recover.

At the height of the pandemic, Destination Northern Ontario's Board of Directors met weekly to discuss and identify strategies to mitigate impacts.

However, like the virus itself, tourism organizations, sectors and individual businesses were affected differently.

An inability to respond to or accommodate the domestic sector, be it pricing, distance, or other challenges, resulted in extreme revenue shortfalls of 90% or more. In some cases, businesses would remain closed through the pandemic.

On the brighter side, consumers were wild for wilderness, and, with its wide open spaces, Northern Ontario was highly attractive to a domestic market that was unable to travel outside Canada. In fact, those operators who were able to respond to the domestic market did considerably better than those who did not, and many operators across the region recorded exceptional visitation (especially those in the cottage rental business).

Statistics show that Northern Ontario accommodators led the country in occupancy during the height of the pandemic.

In 2022 many jurisdictions returned to their prepandemic occupancies and achieved new post-pandemic revenues per room. The North continued with high occupancy but was lower than the provincial average on revenues per available room.

Government responded to the pandemic with financial assistance; however, many businesses simply did not qualify. It appears that in the rural and resource-based tourism sectors there is a greater proportion of operators who function as sole proprietorships or partnerships. The Tourism Industry Association of Ontario and the Ontario Chamber of Commerce predict that, despite the removal of the last of the border and pandemic restrictions, it will be 2025 or later for Ontario's tourism sector to fully recover.

But even prior to the pandemic, Northern Ontario faced systemic and historical challenges. In 2019, the North saw its share of the provincial tourism receipts fall to under 5%. Traditionally Northern Ontario would account for 10% of provincial tourism revenues. It is imperative that we reverse that trend in the years ahead and stimulate growth in the sector. The region needs to capitalize on gains in the domestic market made during the pandemic, encourage the return of the U.S. visitor, and grow its share of the overseas market.

It is imperative that we reverse that trend in the years ahead and incent growth in the sector. The region needs to capitalize on gains in the domestic market made during the pandemic, encourage the return of the U.S. visitor, and grow its share of the overseas market.

But responding by marketing the same products and experiences to the same consumers in the same geographic markets will not achieve the exponential growth that is needed. The region must respond with new products and experiences that resonate with new consumers and markets and address the labour and skills gap as well as invest in new and enhanced infrastructure. The sector needs to address systemic challenges such as transportation deficiencies and improving visitor services. The stakes are high.

To this end moving forward, Destination Northern Ontario will work with progressive tourism organizations, partners, and operators to develop and implement new strategies to grow the Northern Ontario's vital tourism industry. Simply put, we will succeed by being the best!

Destination Northern Ontario's Board of Directors through this strategic plan commits to:

- ✓ Engage the sector.
- ✓ Identify and address gaps that rations the sector's potential.
- ✓ Assist with recovery.
- ✓ Grow the sector.

Destination Northern Ontario is a high achieving organization that aims to positively extend its reach to the entire region. We commit to leverage the Ministry's **\$3.9 million** investment, at minimum, by an additional **\$3.9 million**.

The future is full of opportunity. We hope that you will join us and together we can work to build Northern Ontario as a destination of choice, grow and maximize the economic potential of the sector, and ultimately make Northern Ontario a better place in which to invest, live, and visit.



RTO 13

Regional Overview & Assessment

2014

- 8.2 million visits
- \$1.5 billion in tourism receipts
- \$500 million tax revenues
- 6.2% of provincial receipts
- 2% receipts from overseas markets

2019

- 8.1 million visits
- \$1.5 billion in tourism receipts
- \$400 million tax revenues
- 4.9% of provincial receipts
- 4% receipts from overseas markets

2022

- U.S. arrivals 50% of pre-pandemic level

2023

- Anticipate strong U.S. bounce back
- RV rentals up 50% by overseas markets

IMPACTS OF GLOBAL PANDEMIC



Lockdowns, border closures and continuing border restrictions



Labour shortages and skills gap



Accommodations shortage



Broken transportation and supply chain issues



Renewed interest in Northern Ontario





Statistics

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%**.

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 below.

 **\$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, MHSTCI

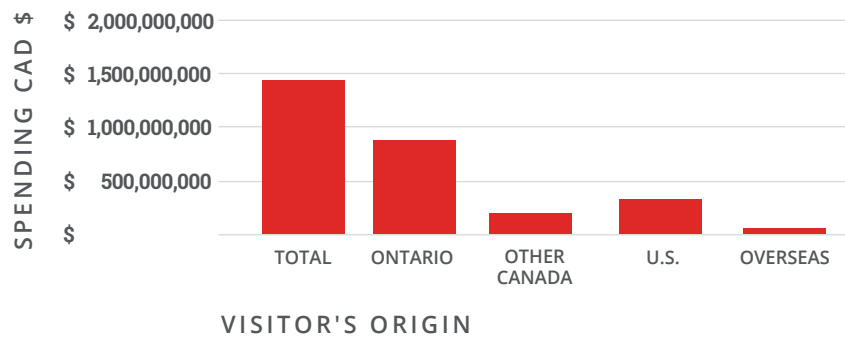
2019 Tourism Statistics – Region 13

Total Visits & Spending

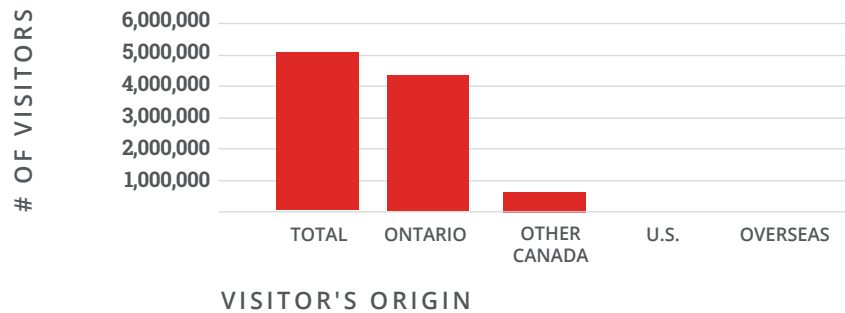
* **Note:** Up until 2020-21, RTO13 was using tourism profiles from 2016 as the quality of the post-2016 data describing the characteristics of U.S. visitors to Ontario was particularly low. The Ministry will not be releasing this information at the sub-provincial level. The 2016 data is now dated over five years; therefore, the organization will be using the new Ministry profiles, border crossing data and research projects for their regional profile.



Visitor Spending in RTO13 (2019)



Total Person Visits to RTO13 (2019)



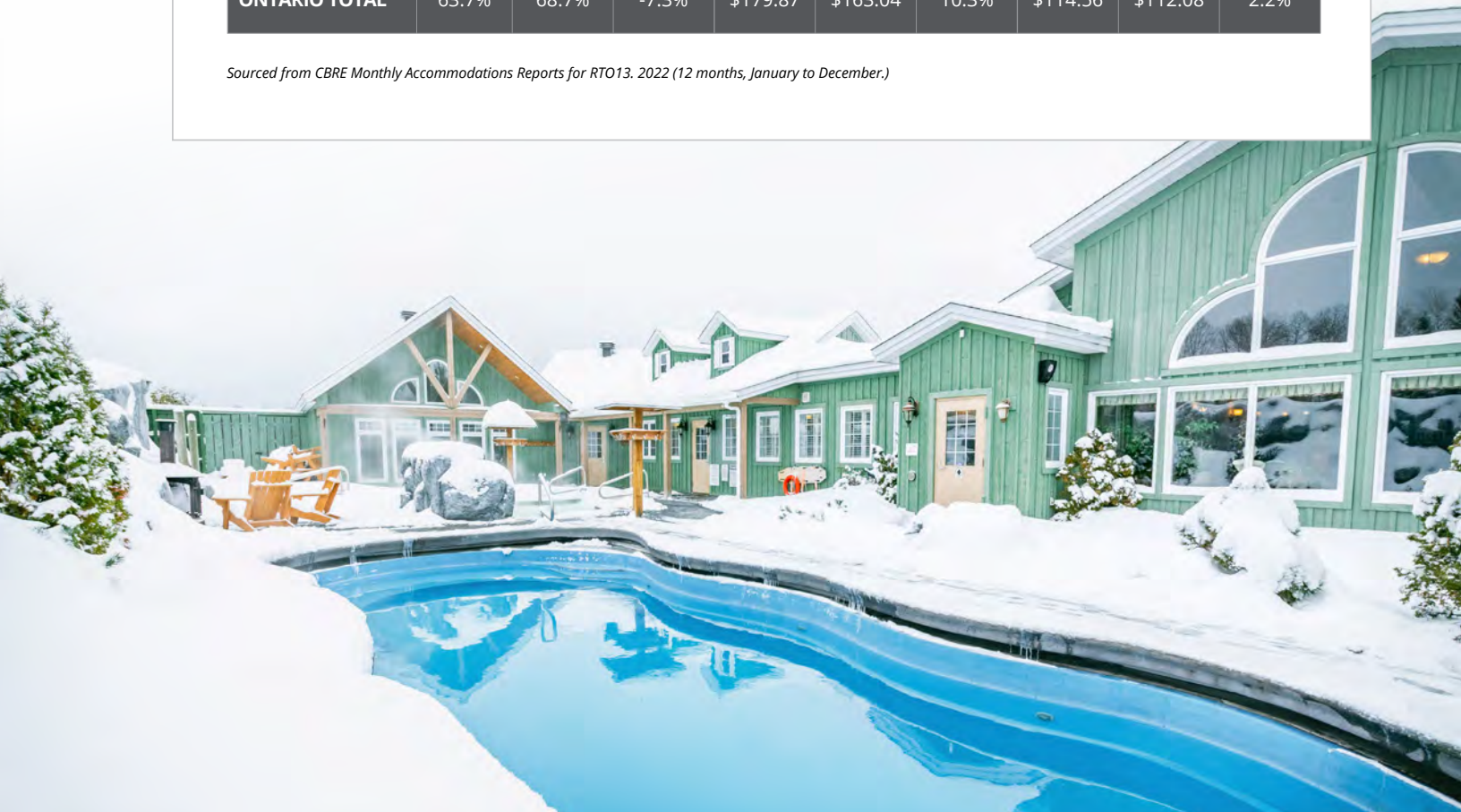


Fixed-Roof Accommodation Performance Statistics (Urban)

After taking a huge hit in 2020, the urban accommodation market has stabilized in Ontario. In Northern Ontario, the accommodation sector is making great strides in terms of occupancy and room revenue, giving the industry a sign of hope that 2023 will be an even stronger year. Growth has outpaced the provincial average in all three measures; however, the average daily rate and revenue per available room lag behind the provincial average by 22.1% and 19.5% respectively.

LOCATION	OCCUPANCY PERCENTAGE			AVERAGE DAILY RATE			REVENUE PER AVAILABLE ROOM		
	2022	2019	Variance	2022	2019	Variance	2022	2019	Variance
13a Northeastern Ontario	62.6%	61.5%	1.8%	\$134.20	\$123.79	8.4%	\$84.07	\$76.19	10.3%
13b Sault Ste. Marie-Algoma	65.8%	59.0%	11.5%	\$132.05	\$115.35	14.5%	\$85.59	\$68.03	25.8%
13c Northwest Ontario	74.2%	69.5%	6.8%	\$156.37	\$129.86	20.4%	\$115.97	\$90.25	28.5%
RTO13 TOTAL	65.9%	63.4%	3.9%	\$140.01	\$124.38	12.6%	\$92.28	\$78.86	17.0%
ONTARIO TOTAL	63.7%	68.7%	-7.3%	\$179.87	\$163.04	10.3%	\$114.56	\$112.08	2.2%

Sourced from CBRE Monthly Accommodations Reports for RTO13. 2022 (12 months, January to December.)





Fixed-Roof Accommodation Performance Statistics (Rural)

In the rural regions of Northern Ontario, it is anticipated that statistical data will show that fixed-roof accommodations experienced a positive 2022 but results will not be known until early 2023 upon completion of Destination Northern Ontario's rural operator performance survey. With border restrictions in place, it is expected the resource-based tourism sector, especially in 13C, will continue to show lower occupancy due to the sector's dependence on the U.S. market.

MEASURE	2021	COMPARED TO 2019	2020	COMPARED TO 2019	2019
Average Number of Guests	232	-90.2%	183	-92.2%	2,357
Average Length of Season	128	-36.3%	131	-34.8%	201
Average Number of Units	12	-45.5%	14	-36.4%	22
Average Revenue per Operation	\$402,000	-75.8%	\$317,000	-80.9%	\$1,658,000

*2022 statistics will be available in Q1 of the 2023-24 fiscal year.



Short Term Rental (STRs) Performance Statistics

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 which, as noted in this assessment, has been uneven to date. While there are many bright spots and successes, some challenges remain.

DECEMBER 2022 vs DECEMBER 2021

PROPERTY TYPE	AVAILABLE LISTINGS			BOOKED LISTING			OCCUPANCY RATE			AVERAGE DAILY RATE			Rev PAR		
	2021	2022	% Chg	2021	2022	% Chg	2021	2022	% Chg	2021	2022	% Chg	2021	2022	% Chg
Entire Place	1,183	1,634	38.10%	839	1,150	37.10%	47%	47%	-1.00%	166	174	5.10%	78	81	4.00%
Private Room	273	341	24.90%	203	242	19.20%	35%	45%	28.60%	64	62	-2.30%	22	28	25.70%
SUBMARKETS (*)															
Region 13A	714	962	34.70%	510	680	33.30%	47%	48%	2.20%	176	183	3.90%	82	87	6.20%
Region 13B	134	220	64.20%	116	172	48.30%	46%	44%	-5.20%	142	153	8.30%	66	67	2.70%
Region 13C	335	452	34.90%	213	298	39.90%	50%	47%	-5.80%	152	163	7.40%	75	76	1.20%

Source: AirDNA DNO Trend Reports

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 which, as noted in this assessment, 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 benefitting 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 suffering due to loss of festivals, meetings, conferences, sporting events.
- **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.
- **High yield, remote access and fly-in fishing lodges and camps** under significant pressure, many with little to no business in 2020 due to border closures, with yet another tough season in 2021 due to COVID restrictions, with U.S. visitors being the largest segment for angling product (especially in the Northwest with 85-90% of visitors being American).



Ontario Border Crossings

With various border restrictions in place through most of 2022, it is no surprise that visits from international markets have not returned to 2019 levels. With the last of the border restrictions removed in the fall of 2022, it is anticipated for Northern Ontario we will see a rebound with visits from international markets and specifically the U.S.A. returning to traditional numbers. Much of the resource-based tourism sector, especially in Northwest Ontario, is reliant on the U.S. market.

2022 INTERNATIONAL BORDER CROSSINGS

Month	2022 Entries	vs 2021	vs 2019
		% Chg	% Chg
January	131,467	100.1%	-82.5%
February	169,632	191.8%	-77.1%
March	282,905	288.5%	-69.6%
April	484,129	554.1%	-56.9%
May	651,213	760.9%	-53.6%
June	1,001,068	1059.5%	-47.7%
July	1,278,055	842.5%	-45.1%
August	1,129,049	252.8%	-51.0%
September	883,630	153.2%	-40.3%
October	872,667	156.4%	-33.4%
November	667,770	126.0%	-33.3%
December	753,491	101.9%	-34.4%

Origin	Jan-Dec 2022 Entries	Jan-Dec 2022 vs Jan-Oct 2021	Jan-Dec 2022 vs Jan-Oct 2019
		% Chg	% Chg
International	8,305,076	269.7%	-49.5%
USA	6,660,170	274.9%	-49.4%
Same Day	2,385,014	230.4%	-61.2%
Overnight	4,275,156	305.3%	-39.0%
Overseas	1,644,906	250.2%	-49.9%

Trends and Visitor Patterns through COVID-19

A number of new visitor patterns and interests impacting travel and tourism, detailed in a significant body of COVID-specific consumer research, are emerging that will influence the experiences and products delivered by the tourism sector not only in Northern Ontario but around the world in both the near term and the longer term.

National ²

Destination Canada has identified these key trends:

INDUSTRY TRENDS

1. Lack of Access and Reduced Transport Connectivity
2. Labour Shortage and Skills Gap
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 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

40% of Canadians are looking to book a domestic trip in the next six months (October 2021-April 2022)

67% of Canadians view restaurants (specifically indoor dining) as safe

Provincial ³

Southern Ontario will be an important 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.

56% of Ontarians feel safe about travel outside of the province but within Canada

80% feel safe when thinking about travel within the province

86% feel safe when thinking about travel to nearby communities

41% of Ontarians are comfortable with flying on a plane domestically

28% of Ontarians perceived safety as much lower when thinking about travelling to the U.S. and 26% to other international destinations

² Sourced from Destination Canada Research Summary (September 2021)

³ Sourced from Destination Canada Research Summary (September 2021)

Emerging Demographic ⁴

Consumers under the age of 45 are 26% more likely to book a hotel versus those 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. 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:

+22%

National
Parks

+30%

Recreational
Vehicle

+46%

Ski
Resorts

+49%

Road
Trips

- **Generation X** travellers will start to dominate the travel landscape in the coming decade; with **151M** Generation X travellers worldwide, they are **twice as likely** to take a leisure trip than older adults. **Sixty-eight percent** 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 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, MHSTCI

Insights from northernontario.travel

- **Upwards of 80%** of all traffic to the portal in the first two quarters of 2022-23 were from Ontario with the largest contributor being the GTA.
- **Soft outdoors** and **powersports** are the highest trending content pieces month over month.
- **Cycling content (+229%)** and **Indigenous content (+223%)** continue to be emerging products of interest across all markets.



Source: northernontario.travel

+229%

Cycling
Content

+223%

Indigenous
Content

+80%

of all traffic to portal
from the GTA

**HIGHEST
TRENDING:**

Soft Outdoors &
Powersports



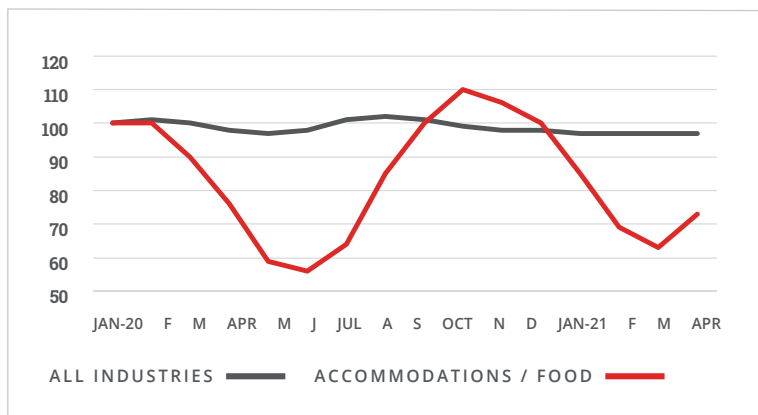
Workforce Overview

Accommodation and Food Services were especially hard hit as a result of the 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 Northeastern and Northwestern Ontario. For easier comparisons, the employment level in 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 Northeastern Ontario at 56% of its January employment and in Northwestern Ontario at 63%. In both areas, employment started rising sharply toward the end of the summer and into the fall, surpassing January employment levels, and since then has dropped, considerably so in Northeastern Ontario. In March 2021, Accommodation and Food Services employment was at 63% of January 2020 levels in Northeastern Ontario and at 87% in Northwestern Ontario.

By comparison, employment in all the other industries dropped much less, bottoming out in May 2020 at 97% of January 2020 employment in Northeastern Ontario and 89% in Northwestern 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.

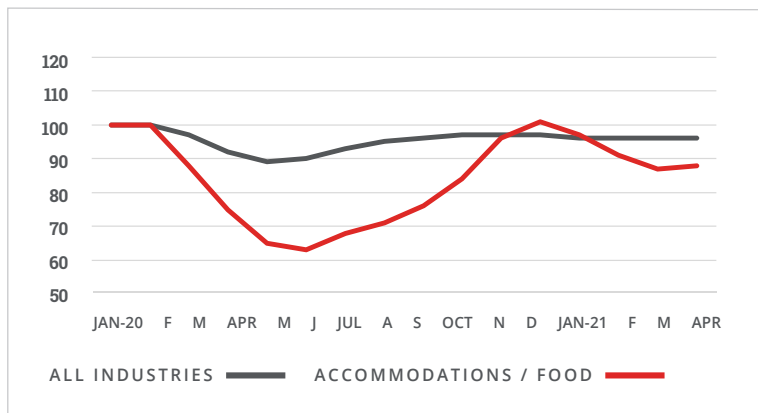
NORTHEASTERN ONTARIO



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)

NORTHWESTERN ONTARIO



Statistics Canada, Labour Force Survey

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)

Product & Experience Overview

Understanding that the global pandemic has created a new demand among 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 travel constraints of the pandemic.

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 6000 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.

Lodges and camps reliant upon the U.S. market were hard hit in 2020 and 2021 and there is no guarantee that it will be business as usual in 2023. However, with border restrictions removed it is anticipated operators will experience a bounce back from this market. Coupled with experience development and refinement, putting a consumer awareness and marketing plan in place now for this contingency will play a role in stabilizing this high yield sector, should the 2023 season be challenged.

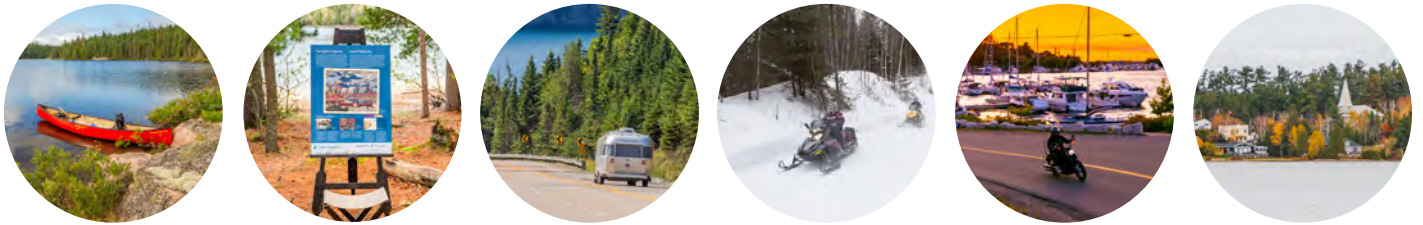


Hunting

- **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 and beyond 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 2022 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 2023 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. **Indigenous tourism** remains important for international markets. Product should be developed in partnership with provincial and federal Indigenous partners.

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 product 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.*

Strategic Focus

These fundamentals, which have been adapted from the last strategic plan following input from DNO’s Board of Directors, will be even more important as the organization navigates this time of crisis.

Vision

Northern Ontario is a unique, distinctive, and sought-after tourism destination wherein high-quality products and experiences resonate with consumers, entrepreneurship is valued, and tourism provides economic benefits and 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 of Directors is committed to focusing on the Vision in an “innovative, results-based, effective and fiscally responsible manner, with a foundation of strong governance and 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)

NORTHERN ONTARIO Priority Streams

01

DEFEND & MAINTAIN

Continue to focus on existing tourism products and experiences in which Northern Ontario excels.

02

INSPIRE & GROW

Focus on new or enhancing existing tourism products and experiences that provide opportunity for growth.

03

RISE & SHINE

Create and foster a culture of excellence and programming to ensure Northern Ontario's tourism products and experiences are best in class in every aspect.

Northern Ontario Priority Tourism Products & Experiences

RESOURCE BASED

Angling
Hunting

NATURE & ADVENTURE

Parks
Paddling
Trails

TOURING

Auto / RV
Cruising
Powersports
Snowmobile
Motorcycle
ATV
Boating/Sailing
Rail

CULTURE & HERITAGE

Indigenous
Francophone
Cultural including Group of Seven
Culinary
2SLGBTQ+

GATEWAY & DESTINATION COMMUNITIES

Attractions
Festivals and Events
Meetings, Conventions, Sports

BUSINESS DEVELOPMENT

Domestic and Transborder Group & Student Tours
International Travel Trade

Moving Forward

With the re-opening of the Canadian/U.S. border and removal of restrictions, Destination Northern Ontario will look to:



Re-engage the tourism sector.



Identify, develop, and implement strategies to mitigate systemic industry gaps that are impeding growth.



Identify, develop, and implement strategies to assist sectors that are struggling with recovery.



Focus on strategies for incremental growth of Northern Ontario's tourism sector to return Northern Ontario's share of provincial tourism receipts to 10%.

Governance & Administrative Priorities

OBJECTIVE

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

As Destination Northern Ontario has grown so has the importance of the Governance and Administration pillar. Good governance and strong organizational excellence support the delivery of initiatives and sets the stage for success in each of the destination development pillars.

Staff associated with this pillar have returned to the office and a key factor moving forward will be monitoring the pandemic and making necessary process and policy adjustments to ensure safe and effective operations.

Over the course of the next five years the organization will continue to identify, review, and streamline processes to ensure continued compliance with policies and full successful execution of initiatives.

The Board will continue to self-evaluate, manage succession as required, and provide good governance and strategic direction to the Executive Director.

DESTINATION NORTHERN ONTARIO'S

Organizational Goals



BUSINESS DEVELOPMENT GOALS

- › **Generate** industry research and monitor industry performance to continually improve products and experiences and evaluate 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 partnership and workforce development and industry training.



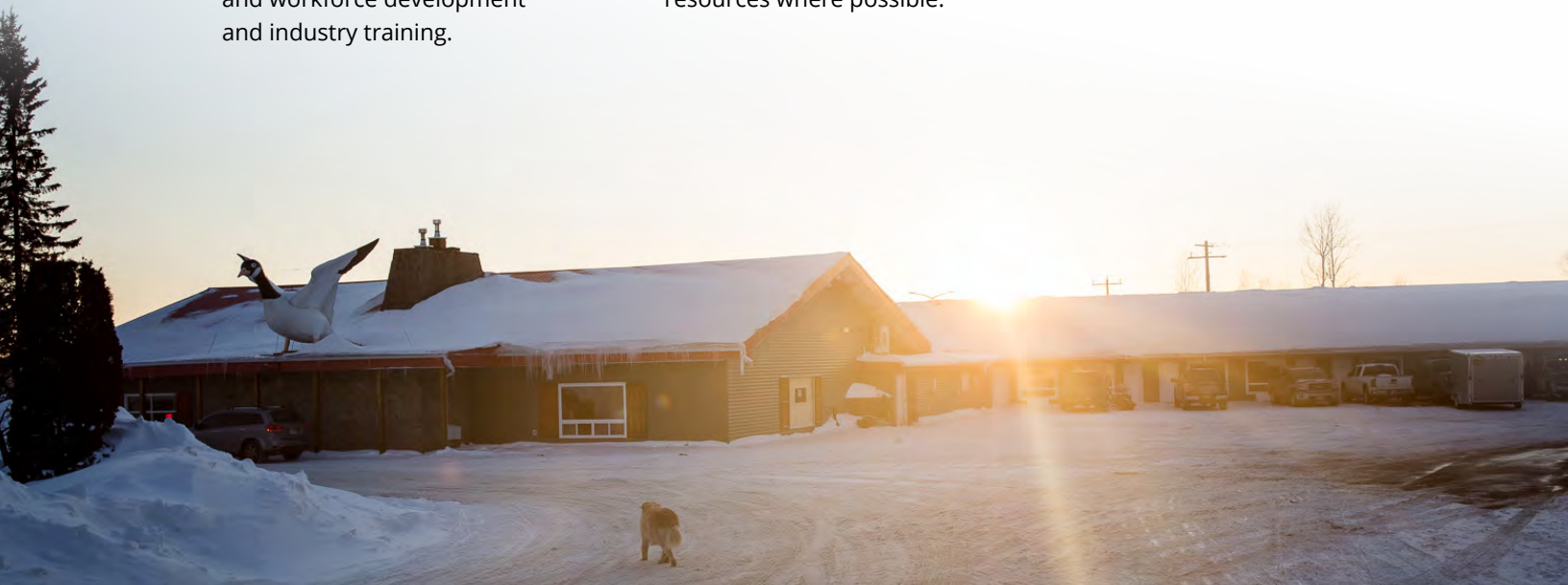
OPERATIONAL EXCELLENCE GOALS

- › **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, and streamlining resources where possible.



INDUSTRY LEADERSHIP GOALS

- › **Demonstrate** Destination Northern Ontario's role as the industry leader.
- › **Foster** communication and relationship building in the tourism sector to ensure industry stakeholders recognize Destination Northern Ontario's role as a champion for growth and ensure access to relevant resources and programming.





Governance & Administration | Priorities

Priority Action Areas

01

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.

Key Activities

- | | |
|----------|---|
| a | Undertake annual board and lead staff evaluations. |
| b | Identify opportunities for professional development, renewal, and succession. |
| c | Focus on strategic implementation. |
| d | Review, research and develop internal policies and identify opportunities to increase diversity, equity, and inclusion. |

02

Enhance organizational excellence with consistent adherence to Board and operational policies and procedures, and compliance with provincial conflict of interest policies.

Key Activities

- | | |
|----------|--|
| a | Adhere to and monitor compliance with DNO policies and undertake an annual review to ensure relevance. |
| b | Measure effectiveness and satisfaction through annual performance surveys. |
| c | Monitor effectiveness of committees and working groups. |

03

Ensure that staffing plan aligns with strategic plan and consistently monitor resource allocations to ensure long-term organizational stability and sustainability.

Key Activities

- | | |
|----------|--|
| a | Pillar managed by Executive Director and Senior Coordinator Corporate Services with support of Office Administrator and Financial Officer. |
| b | Review resource needs for all DNO programs. |
| c | Explore new funding opportunities. |
| d | Conduct regular staff meetings. |
| e | Undertake annual staff performance reviews and evaluations. |
| f | Identify opportunities for professional development, renewal, and succession. |



Governance & Administration | Priorities

Priority Action Areas

04 **Maintain** a positive and effective workplace. Ensure all service contracts with outside organizations reflect DNO's Mission and Vision.

Key Activities

a Conduct annual reviews and audits of contracts, mandates, and deliverables.

05 Keep contract and MOU templates current and available. Establish quantifiable performance metrics with clear targets across all pillar areas to ensure DNO's strategic actions are translating into improved regional performance.

Key Activities

a Track performance and provide reports to funders as required and on time.

b Identify and monitor priorities/initiatives that require compliance with Destination Northern Ontario's Risk Management Plan.

c Maintain five-year strategic plan and develop annualized business plans in accordance with MTCS directives.

Key Performance Indicators



Board, staff and partner engagement and satisfaction with progress in accomplishing strategic directives.



Percentage of planned initiatives undertaken, completed and on-budget and percentage of core budget leveraged.



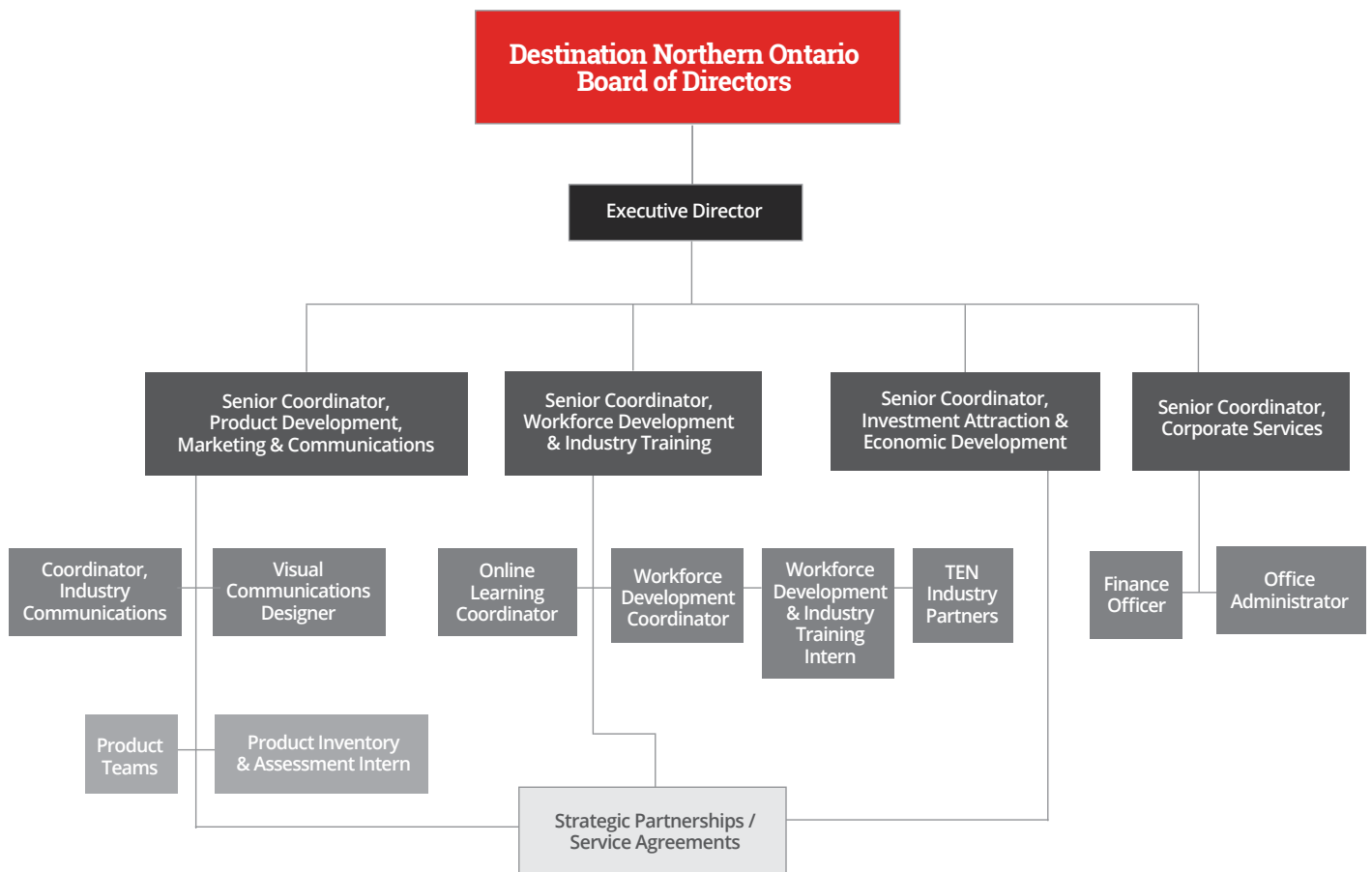
Annual financial audit is clean, on time, and with no deficit.





DESTINATION NORTHERN ONTARIO'S

Organizational Structure





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.



Pillars

Destination Northern Ontario focuses on the development and programming in **five** pillars mandated by the Ministry of Tourism, Culture and Sport:



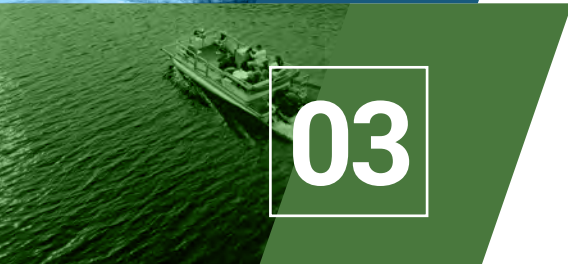
01

Product Development



02

Investment Attraction



03

Workforce Development & Industry Training



04

Marketing & Communications



05

Partnerships

01 Product Development

Objective

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

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

The COVID-19 pandemic put the product development pillar into a new perspective in the last three fiscals. Due to the shift in available markets and consumer demand, it is more important than ever to consider product quality and diversity so that visitors continue to make Northern Ontario their destination of choice.

To effectively assess Northern Ontario's current product offerings post-pandemic, a full inventory and assessment exercise will begin in 2023. This will see all current product offerings inventoried, including attractions, experiences, services, private operators and tourism information centres, and assessed according to their alignment with priority experiences and their market-readiness. Often, product offerings have a champion or custodian who is primarily responsible for bringing it to market. For example, the Lake Superior Circle Tour is associated with Superior Country as it is primarily marketed through that organization.

This exercise will also identify champions of products to ensure sustainability and continuity.

Projects aligning with Destination Northern Ontario's priority products and experiences will continue to emerge as a result of discussion and direction of their corresponding product teams. Product teams will also be instrumental in identifying products for assessment and inventorying. To support this work, Destination Northern Ontario will continue to invest in research and market analysis relative to emerging and existing products.

Finally, Destination Northern Ontario will continue to set the foundation for improved visitor services across the north. This includes supporting community and trails wayfinding, supporting Tourism Information Centres so they have capacity to be true ambassadors of the region and leveraging training opportunities to set a standard of excellence as it pertains to the visitor experience.



Product Development | Strategic Focus

The following chart identifies strategic action areas to guide initiatives over the next five years, along with primary Product Development activities that DNO will need to achieve to meet its organizational goals:

Priority Action Areas	
01	Implement staffing plan to demonstrate leadership, execute and report on initiatives within the product development pillar.
Key Activities	
a	Senior Coordinator to implement key activities and action areas with aid of Industry Communications Coordinator and Product Inventory Intern (NOHFC Year 1), assessing staff complement as needed.
b	Review and implement reporting process to ensure organizational excellence and strong industry communications.
c	Monitor performance and implementation of product development strategy, review, and refresh as necessary to keep current and relevant.
d	Review, research and develop internal policies and identify opportunities to increase diversity, equity, and inclusion.
02	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 increasing visitation and yield.
Key Activities	
a	Inventory, assess and identify champions for current best bet products and experiences through product teams, working groups, and product plans that focus on partnership, recovery and growth.
b	Identify new products and/or markets for existing products and support further development through research, market analysis and fixed roof accommodation trends.
c	Prioritize products and experiences that demonstrate diversity, equity, inclusion, sustainability and accessibility.
d	Leverage opportunities through other pillar programming and partnerships to achieve annual goals including inventorying, assessing and researching best-bet products and experiences.



Product Development | Strategic Focus

Priority Action Areas

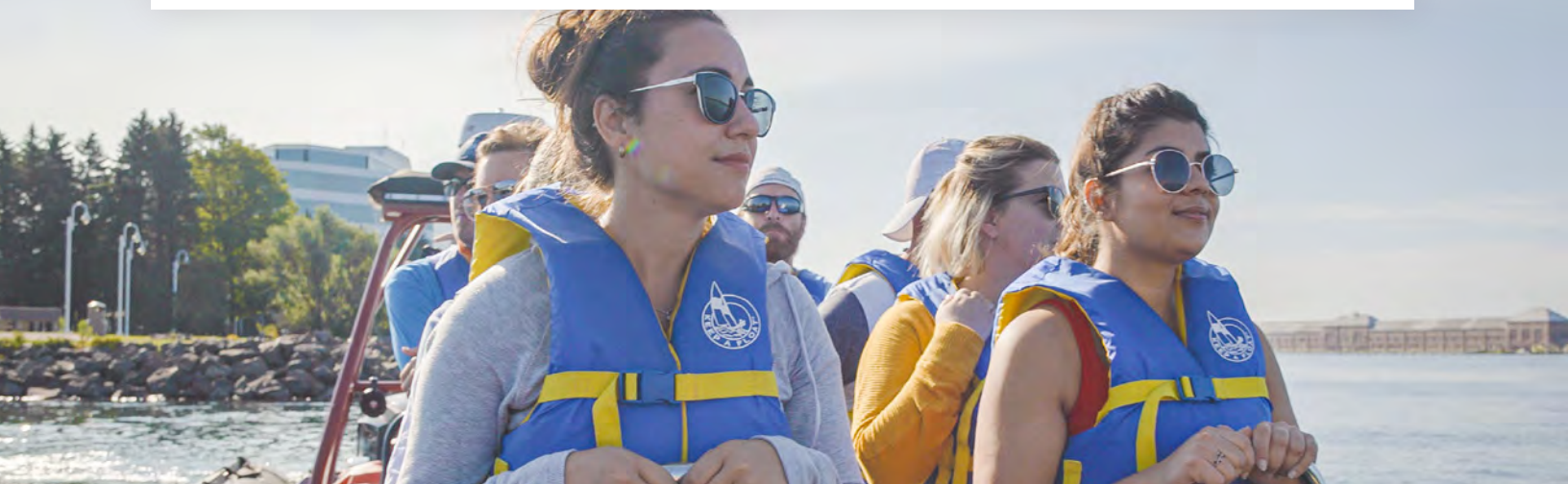
03 Set the foundation for improved visitor services and product quality across the region.

Key Activities

- | | |
|----------|--|
| a | Enhance and support travel information services through extended summer employment opportunities, consumer touch points and wayfinding tools. |
| b | Foster a culture of excellence among visitor service ambassadors through training opportunities. |
| c | Leverage opportunities through other pillar programming and partnerships to maintain a superior standard for visitor services and product quality. |

Key Performance Indicators

- | | |
|---|--|
| ✓ | Number of new and existing products inventoried and assessed. |
| ✓ | Number of new and updated products available for market resulting from product development activities. |
| ✓ | Number of stakeholders participating in product development activities and satisfaction. |
| ✓ | Percentage of initiatives completed compared to target. |
| ✓ | Number of TICs engaged in DNO programming |



02

Investment Attraction

Objective

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

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

Investment Attraction and economic development activities aid the region as the industry navigates and eventually recovers from both the pandemic and global recessions, with a focus on business recovery, succession, and enhanced opportunities in unserved/ underserved areas.

Moving forward, DNO plans to ensure regular meetings with stakeholders which will allow both groups to be actively engaged on potential opportunities. Through this, DNO will be able to be a key contributor to community development activities with a tourism slant.

In the years since the formation of a dedicated Investment Attraction pillar, significant progress has been made towards building a framework through which to open up new lines of communication with

stakeholders, connecting communities with government and private business interests, as DNO facilitates development opportunities and assists in leveraging resources to bring new projects to fruition.

Projects which provide value to stakeholders across the spectrum have been launched, addressing pan-Northern gaps in service that can be remedied through collaborative public-private partnerships, including in investment attraction, business succession, and accommodations. The Pan-Northern Ontario Accommodations report, an organically driven, multi-agency- funded collaborative project, will provide a roadmap for business gaps in Northern Ontario's tourism sector, highlighting opportunities and advocating for improvements in infrastructure and amenities as well as identifying complementary businesses.

The Investment Attraction pillar will continue to highlight tools and research opportunities that allow both investors and economic development professionals to have a full suite of resources needed to maintain and grow the tourism sector in Northern Ontario. Bringing data and analytics, especially to the rural areas, will allow small businesses to make rational choices and grow their businesses responsibly, with a support system from local and regional stakeholders that Destination Northern Ontario works collaboratively with to ensure the growth is meaningful and aligns with other growth in the region. Destination Northern Ontario will continue to grow its online presence, providing these tools to stakeholders and building out investment attraction capabilities meant to target new entrepreneurs and new Canadians towards investing in Northern Ontario, all in a simple, multimedia-driven, easy to use interface.



Investment Attraction | Strategic Focus

The following chart identifies the primary strategic action areas and the key Investment Attraction activities that DNO will need to achieve to meet its business development goals over the next five years:

Priority Action Areas	
01	Implement staffing plan to demonstrate leadership, execute and report on initiatives within the product development pillar.
Key Activities	
a	Senior Coordinator to implement key activities and action areas with aid of Industry Communications Coordinator and potential new Investment Attraction staff, assessing the pillar's complement as needed.
b	Review and implement reporting process to ensure organizational excellence and strong industry communications.
c	Monitor performance and implementation of Investment Attraction and Economic Development Strategy, review, and refresh as necessary to keep current and relevant.



Investment Attraction | Strategic Focus

Priority Action Areas

02 Enhance DNO's role as a resource centre for Northern Ontario businesses seeking investment and for Northern Ontario's investment community.

Key Activities

- | | |
|----------|--|
| a | Monitor performance, review efficacy, and continue to develop online tools and resources. |
| b | Invite partners and advisors to discuss relevant investment related topics at DNO Board meetings. Develop working relationships at the municipal, regional, and provincial level, and with other relevant stakeholders, to develop a cohesive investment attraction portfolio. |
| c | Communicate information and programs relative to Northern Ontario investment to industry. |

03 Provide support for investment into Northern Ontario products and experiences.

Key Activities

- | | |
|----------|---|
| a | Provide support to facilitate succession planning. |
| b | Provide grant writing assistance to first time applicants. |
| c | Update and maintain list of tourism investment funding resources. |
| d | Curate research that supports economic development initiatives and promotes investment. |
| e | Advocate for the recognition of tourism in economic development plans for Northern Ontario. |
| f | Work with the Senior Coordinator, Workforce Development and Industry Training to develop a mentorship program for Northern Ontario's tourism operators and specifically to business operation and financial activities. |



Investment Attraction | Strategic Focus

Priority Action Areas

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

Key Activities

- a Implement and expand on Investment Attraction and Economic Development Strategy that will guide initiatives.
- b Engage the investment and economic development community through stakeholder meetings, conferences, and project coordination.
- c Attract investment and provide support for those looking to enter Northern Ontario's tourism industry.
- e Explore opportunities for access to capital funding for operators.

Key Performance Indicators

- ✓ Growth in leveraged funding from other sources.
- ✓ Increase in usage of DNO's investment attraction tools and resources.
- ✓ Increased investment into Northern Ontario businesses (new and existing).
- ✓ Increase in economic development and other stakeholder participation.



03 Workforce Development & Industry Training

Objective

The primary objective to guide Workforce Development and Industry Training in Northern Ontario over the next five years is:

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

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

One of Destination Northern Ontario’s most notable accomplishments has been the development of the Tourism Excellence North (TEN) program, with support from FedNor and NOHFC. At the end of the third and final year of the pilot, TEN saw the successful delivery of all proposed TEN training and solutions and a full rollout of the program. At the 2018 Ontario Tourism Summit in Windsor, the TEN program was named Tourism Innovator of the Year, an award which recognizes an organization or individual that created a new innovative product, policy or service to promote and enhance tourism in their local community, region or the Province of Ontario.



To consolidate Industry Training and Workforce Development efforts undertaken by the organization within the Tourism Excellence North program, Destination Northern Ontario developed a Five-Year Workforce Development and Industry Training Strategy (2020-2025). Building on previous successes, this strategy set forth a new direction for Destination Northern Ontario as it inventories existing programs, develops new initiatives to complete identified gaps, updates and delivers curriculum, works with existing partners and follows up with mentorship post-training. It fulfills objectives of the Workforce Development and Training pillar area with a dedicated Senior Workforce Development and Industry Training Coordinator with the support of the Online Learning Coordinator, Workforce Development Coordinator and a 2-Year Workforce Development & Industry Training Intern Coordinator.

During COVID-19, TEN's training delivery moved to an online model. Given the level of satisfaction expressed among participants and as outlined in its 2020 Strategy, an online delivery model is being implemented as part of the Workforce Development and Industry Training solutions mix during COVID-19 recovery and beyond. In 2021, funding of \$990,000 was secured from FedNor and NOHFC for a three-year Workforce Development and Industry Training Recovery Project to further implement the goals of the strategic plan and pandemic recovery. To date, TEN has increased its online learning offers and transitioned existing face-to-face learning to an online format in order to meet the needs of stakeholders during and post-pandemic.



tourismexcellencenorth.ca

Stakeholders can learn whenever and from wherever they would like, to suit their needs and schedules. To note, a micro-credential program, Ontario Professional Tourism Industry Specialist/ Northern Ontario Professional Tourism Industry Specialist (OPTIS/NOPTIS), has been developed and launched in collaboration with Lakehead University and Collège Boréal and TEN's website redesign is underway. Additional labour skills gap courses and modules will also be developed and technology enhanced where needed.

The Northern Ontario Tourism Summit has been a cornerstone event for delivering industry training; however, due to COVID-19 the event was held virtually as part of Destination Northern Ontario's Fall Training Week in 2020 and 2021. Destination Northern Ontario, in partnership with NOTO, hosted the summit in person in November 2022 in Thunder Bay and look forward to gathering with tourism colleagues again in the future.



Launched in May 2021, the Tourism SkillsNet North (TSNN) program identifies workforce labour shortages and skills gaps specific to Northern Ontario, designs responsive customized training to meet these specific needs, and assists operators in recruiting, training and hiring staff in collaboration with Ontario Tourism Education Corporation (OTEC) and Nature and Outdoor Tourism Ontario (NOTO). To date, the program has trained more than **350 employees** and matched them with available job opportunities within Northern Ontario's tourism sector. The \$3.8M project, supported by the Ministry of Labour, Training and Skills Development, supports qualified employers whose businesses have been negatively impacted by the pandemic with a wage subsidy between 30 and 50 per cent or \$3,000 to \$5,000 per employee.

Destination Northern Ontario has launched a Tourism as a Career Awareness Campaign and a workforce advisor program in 2023. It is anticipated that the TSNN program will continue for another three years in RTO 13, assisting RTOs 7 and 9 to launch their own programs, and training approximately an additional 650 participants or more while providing wage subsidies to employers.





Workforce Development & Industry Training | Strategic Focus

The following chart identifies strategic action areas to guide initiatives over the next five years, along with primary Workforce Development and Industry Training activities that DNO will need to achieve to meet its organizational goals:

Priority Action Areas	
01	Implement staffing plan to demonstrate leadership, execute and report on initiatives within the workforce development and industry training pillar.
Key Activities	
a	Senior Coordinator to implement key activities and action areas with support of Online Learning Coordinator, Workforce Development Coordinator, Workforce Development & Industry Training Intern (FedNor 2-Year), and TEN industry partners, assessing staff complement as needed.
b	Review and implement reporting process to ensure workforce development and industry training organizational excellence.
c	Monitor performance and implement workforce development and industry training strategy and plans, review, and refresh as necessary to keep current and relevant.
d	Review, research and develop internal policies and identify opportunities to increase diversity, equity, and inclusion.
02	Generate and share industry research to support workforce development and industry training initiatives.
Key Activities	
a	Research and identify Northern Ontario tourism workforce labour gaps.
b	Research tourism five-star rating system.
03	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.
Key Activities	
a	Work in collaboration with NOTO and OTEC to deliver a three-year program to recruit, train and match job seekers/participants with available job opportunities. b Implement a "Tourism as a Career" awareness campaign including a "Tourism Rocks" toolkit and an Ambassador program.
b	Implement a Tourism as a Career Awareness Campaign including a 'Tourism Rocks' Toolkit and an Ambassador program.



Workforce Development & Industry Training | Strategic Focus

Priority Action Areas

04 **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.

Key Activities

- a** Continue to engage Brokers, DNO Product Teams and Training Specialists in an ongoing collaborative process.
- b** Collaborate with organizations already delivering or positioned to deliver training that supports increased capacity or excellence for Northern Ontario's priority sectors.
- c** Collaborate with external tourism and training organizations to tailor and potentially deliver segments of training.
- d** Develop partnerships with education facilities and community development agencies and organizations to minimize barriers to address labour gaps, meet training needs and eliminate barriers to training opportunities.

05 **Continue** to enhance on-line training, tracking, opportunities for accreditation and micro-credentials, and mentorships.

Key Activities

- a** Continue to research and identify 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.
- b** Continue to research, identify, and participate in peer-to-peer training on the development and incorporation of online courses, web-based workshops, and self-directed training.
- c** Continue to develop and deliver new curriculum/content for online learning, self learning, group learning, personalized and/or mentorship training solutions.
- d** Develop and implement a post-training mentorship program.
- e** Continue to develop a series of new bilingual tools and training modules that could include certifications for completion. This includes a redesign/development of DNO/TEN's training portal.



Workforce Development & Industry Training | Strategic Focus

Priority Action Areas

06 **Develop** strategies to increase industry awareness, engagement and enrollment in Destination Northern Ontario and partner training opportunities.

Key Activities

a	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 quarterly updates).
b	Continue to foster partnerships among educational organizations, community employment training programs and industry to expand delivery and reach.
c	Create and implement a marketing and communication plan for TEN through the Tourism Recovery program.
d	Develop and implement a marketing campaign for the Tourism SkillsNet North program.

Key Performance Indicators

	Number of stakeholders reporting business/customer improvements as a result of Destination Northern Ontario training activities.
	Number of stakeholders participating in and showing satisfaction with Destination Northern Ontario training activities.
	Percentage of initiatives completed to target.



04

Marketing & Communications

Marketing Objective

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

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

With the overall objective of increasing tourism receipts in Northern Ontario, and more specifically, increasing receipts to 10% of the overall spend in the Province of Ontario, Destination Northern Ontario must continuously push the envelope when marketing its best-bet products and experiences to potential visitors. As demand grows for new products, it is equally as important to foster the already existing visitor base of avid consumers including in the fishing and hunting markets as well as powersports.

Consumer marketing will be broken down into two segments: defend and maintain and rise and shine. Defend and maintain products will be marketed to existing consumers and in traditional travel corridors that have proven ROI and visitation. In order to diversify and surpass traditional spending in the region, Destination Northern Ontario will also look to rise and shine products such as the soft outdoors and touring. These markets will be nurtured in conjunction with maintaining existing markets which will, in turn, result in a holistic marketing approach for the North.

International markets remain vitally important to the growth of tourism receipts in the region as we know the rate of return on these consumers is four times those of an average visitor.

Destination Northern Ontario will continue to develop pan-Northern marketing tools that help the region to promote and sell viable tourism products including the Northern Ontario Trip Planner which is the cornerstone of itinerary development for the North. Alongside industry partners, the organization will support the development of e-commerce platforms that provide the consumer a seamless path-to-purchase and increase direct sales in the region.

Destination Northern Ontario will take its cue from provincial strategies and frameworks as they are released to revise its new three-year digital strategy as well as a Northern Ontario Tourism Marketing Strategy in partnership with Destination Ontario. These documents will guide marketing activities this fiscal and beyond.



Marketing | Strategic Focus

The following chart identifies strategic action areas to guide initiatives over the next five years, along with primary Marketing activities that Destination Northern Ontario will need to achieve to meet its organizational goals:

Priority Action Areas

01 Implement a staffing plan to demonstrate leadership, execute and report on initiatives within the marketing pillar.

Key Activities

- | | |
|----------|---|
| a | Senior Coordinator to implement key activities and action areas with aid of Industry Communications Coordinator and Visual Communications Designer, assessing staff complement as needed. |
| b | Review and implement reporting process to ensure organizational excellence and strong industry communications. |
| c | Monitor performance and implementation of marketing and communications strategies and other plans, review, and refresh as necessary to keep current and relevant. |

02 Generate and share industry research to assist in planning and to increase effectiveness of marketing initiatives.

Key Activities

- | | |
|----------|--|
| a | Implement new tracking and reporting measures on NorthernOntario.travel and the Trip Planner to gain greater insight to potential consumer trends. |
| b | Leverage consumer marketing tools to survey potential visitors on trip motivators and other key insights. |
| c | Lead in market research for new and existing target markets including domestic, transborder and international. |
| d | Undertake research on key demographics including sunsetting and upcoming visitor demographics (i.e. boomers and gen Z). |



Marketing | Strategic Focus

Priority Action Areas

- 03 Enhance** Destination Northern Ontario’s role as a resource by supporting tourism businesses and organizations with customized marketing tools that will increase collaboration, awareness, distribution, conversion, performance, and tracking.

Key Activities

a	Support the development of e-commerce platforms that meet the needs and expectations of today’s consumers to increase sales in the region.
b	Continue to grow and develop NorthernOntario.Travel as the premier consumer-facing marketing platform for RTO13 through content development including written and video.
c	Grow collective digital asset library with compelling photography and video and ensure it is relevant, accessible, and affordable to industry.
d	Re-evaluate all reporting measures and key performance indicators to ensure relevancy and alignment with the overall goal of growing Northern Ontario’s share of provincial tourism receipts to 10%.

- 04 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 ensuring alignment with priority products and experiences.

Key Activities

a	Increase Northern Ontario’s profile as a destination of choice through collaborative pan-northern campaigns that represent best-bet products to new and existing markets.
b	Invest in communities and destinations to defend and maintain established products to target markets to maintain visitation and receipts.
c	Invest in communities and destinations to grow markets for new and upcoming tourism products to increase visitation and new spending.
d	Align marketing efforts with PMO to maximize brand awareness in target markets.
e	Invest in product tours and media familiarization tours that showcase best-bet products, align with the organization’s overall marketing and product development goals and maximize opportunities to participating partners.

Key Performance Indicators

✓	Percentage increase in web traffic, direct bookings, completed media fams and leveraged marketing efforts from partners.
✓	Change in # of partners participating in marketing programs and satisfaction.
✓	Percentage of initiatives completed compared to target.

Communications Objective

The primary objective to guide Communications in Northern Ontario over the next five years is:

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

Destination Northern Ontario has aligned its industry communications initiatives to demonstrate leadership and a strategic direction to increase awareness of the Northern Ontario tourism sector's social and economic importance.

Over the past five years, industry communications have been intentionally created, curated and directed to three audience streams: government and economic development professionals, tourism operators and owners, and municipalities and communities. This approach has allowed the organization to communicate relevant content on programs, events, and industry news to those most likely to engage with it.

To effectively raise awareness of Destination Northern Ontario's activities and its initiatives among existing industry and institutional stakeholders, a three-year Communications Strategy was completed during the 2022-23 fiscal year, through the lens of the 2023-25 Industry Digital Strategy. The 2022-25 Communications Strategy will provide a strategic direction and a consolidated approach to ensure consistent and clear messaging, through all content relevant to the tourism sector and Destination Northern Ontario's priority areas. Through the implementation of the strategy, corporate communications will be guided until the end of 2025.





Communications | Strategic Focus

The following chart identifies strategic action areas to guide initiatives over the next five years, along with primary Communications activities that Destination Northern Ontario will need to achieve to meet its organizational goals:

Priority Action Areas

01 Implement staffing plan to demonstrate leadership, execute and report on communication initiatives.

Key Activities

- a** Industry Communications Coordinator to implement key activities and action areas with aid of Visual Communications Designer, assessing staff complement as needed.
- b** Review and implement reporting process to ensure organizational excellence and strong industry communications.

02 Develop and implement strategies to engage, inspire and re-connect with industry.

Key Activities

- a** Implement annual Communications Plan through the lens of the 2023-25 Industry Digital Strategy.
- b** Continue to engage industry partners through the annual Northern Ontario Tourism Summit and increase satisfaction.
- c** Implement industry francophone and Indigenous engagement strategies.





Communications | Strategic Focus

Priority Action Areas

03 **Develop** and implement strategies to communicate Destination Northern Ontario and partner initiatives and programs.

Key Activities

a	Implement annual Communications Plan through the lens of the 2023-25 Industry Digital Strategy.
b	Continue to enhance website resource centre.
c	Maintain and grow existing profiles across all social media channels.
d	Develop and implement a social media plan that identifies realistic social marketing goals including building an engaged and informed following.
e	Create, monitor and update Destination Northern Ontario's industry calendar to generate awareness of Northern Ontario's industry events.

04 **Develop** and implement strategies to increase awareness of the Northern Ontario tourism sector's social and economic importance

Key Activities

a	Implement annual Communications Plan through the lens of the 2023-25 Industry Digital Strategy.
b	Enhance positive perceptions of Northern Ontario by updating, maintaining, and distributing Destination Northern Ontario's Media Relations Kit.
c	Execute awareness campaigns that promote tourism as a viable career, economic driver, and growth sector.

05

Partnerships

Objective

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

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

Destination Northern Ontario has always been successful in identifying partners and working in partnership with tourism organizations across the region. In fact, much of its core funding is partnered and leveraged with the sector.

However, the Ministry of Tourism, Culture and Sport has identified a separate pillar whereby RTOs can leverage their core investment, extend reach, incent participation in initiatives, and capitalize on the Municipal Accommodation Tax to further the implementation of strategic priorities.

Destination Northern Ontario will continue to work in all pillar areas, work with partners who have a track record of innovation and success, show strong leverage of the partnership allocation to undertake strategic planning and implementation, research, extend the reach and focus of marketing campaigns including destination awareness and industry awareness, as well as training and engaging the sector through specialized events like the Northern Ontario Tourism Summit.



Partnerships | Strategic Focus

The following chart identifies strategic action areas to guide initiatives over the next five years, along with primary Partnership activities that Destination Northern Ontario will need to achieve to meet its organizational goals:

Priority Action Areas

01 Implement staffing plan to demonstrate leadership, execute and report on partnership initiatives.

Key Activities

a Senior Coordinators will identify, align and executive partnerships within their pillar area and collaborate across pillars.

02 Work in partnership with industry to identify and implement partnered initiatives that align with Destination Northern Ontario strategic priorities and in all pillar areas.

Key Activities

a Develop and implement strategic plans, business plans and impact studies across the region that align with best-bet products and experiences, tourism business attraction and development.

b Invest in community and trail wayfinding to enhance the visitor experience.

c Leverage Tourism Excellence North's Fast Track to Success program to aid businesses in developing new product or enhance existing product for emerging markets and demographics.

e Invest in marketing campaigns that increase awareness of Northern Ontario as a destination of choice in target markets and promote tourism as a career, importance as an economic driver and growth sector.

f Partner with operators who have completed TEN's Fast Track to Success program by investing in marketing recommendations.

g Partner with industry to implement marketing campaigns that defend and maintain visitation for RBT operators in the region.

h Partner to execute Northern Ontario Tourism Summit.



Partnerships | Strategic Focus

Priority Action Areas

03 Continue to leverage investment and efforts across all pillar areas.

Key Activities

- a Set targets, track, and report partnership investment across all pillar areas.

Key Performance Indicators

✓	Number of partners, compared to previous year(s), and satisfaction.
✓	Number of initiatives completed, on time and on budget.
✓	Dollars leveraged compared to target.
✓	Partnerships in all pillar areas and compared to target.



DESTINATION NORTHERN ONTARIO'S

Financial Plan

Area of Focus	Budget	%	% including Partnership
Governance & Administration	\$ 425,235.00	11%	11%
Product Development	\$ 350,000.00	9%	11%
Investment Attraction	\$ 300,000.00	9%	11%
Workforce Development & Industry Training	\$ 500,000.00	13%	14%
Marketing & Communications	\$ 1,700,000.00	43%	53%
Partnerships	\$ 605,000.00	15%	Included in pillar budgets
Leveraged Investments	\$ 3,930,235.00	100%	
Total	\$ 7,860,470.00	200%	

Risk Management

Destination Northern Ontario has developed a Risk Management Plan for implementation. As the organization has grown and extended its reach, the plan will help staff mitigate challenges and respond to uncertainty. As new initiatives and partnerships develop, a framework is in place that the lead staff or steering committees can use to avoid risk. Risk management is an essential component in effectively managing and successfully completing Destination Northern Ontario projects.



DESTINATION
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