

TOURISM NORTHERN ONTARIO

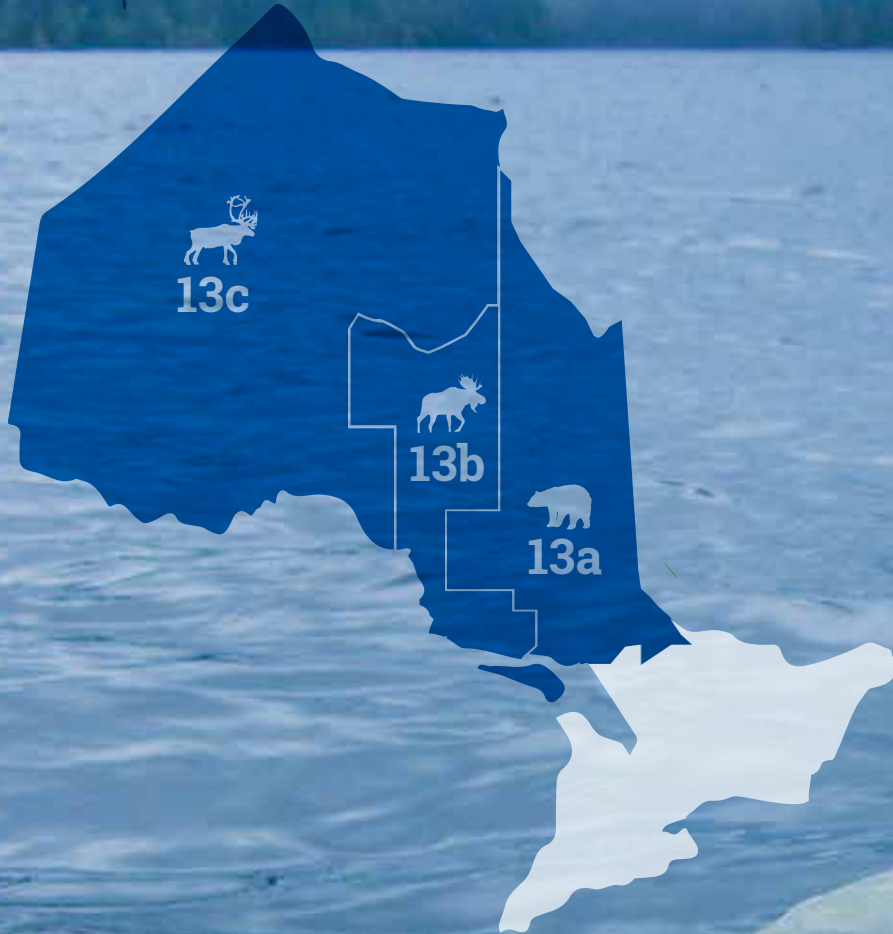
2017-18

Business Plan





RTO 13



2017-18 Business Plan

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MESSAGE FROM THE PRESIDENT

2017/18 marks our sixth year of operations as Northern Ontario Regional Tourism Organization (RTO) 13; operating as Tourism Northern Ontario (TNO). Through many years of planning, research and groundwork, we are ready to start a new chapter in the organization's history focusing on implementation and programming aligned with the Ministry of Tourism, Culture and Sport (MTCS).

2016 proved to be an exciting year for TNO. We successfully partnered in over 21 projects across the North leveraging over \$2 million in private and public resources. Tourism Excellence North (TEN), our tourism training and product development program, engaged with over 50 operators and trained approximately 100 brokers to deliver the program. Our organization carefully prepared for a new strategic direction for marketing in Northern Ontario in partnership with the Ontario Tourism Marketing Partnership (OTMPC). Outreach and awareness continued throughout the year, perhaps most notably with the "Tourism Rocks!" campaign which used radio and digital marketing techniques to promote the importance of the tourism industry to Northern Ontario. The campaign was a tremendous success.

In the fall of 2016, the MTCS released a new framework for tourism in Ontario. Tourism Northern Ontario has fully embraced this framework and will align our goals as closely as possible while respecting the unique challenges and strengths of our region. Building on the past successes of TNO's work in our four priority areas (marketing, product development, workforce and industry training, and investment attraction), TNO will modify these areas to align with the provincial framework and continue progress in programs across the North.

With a new governance structure fully in place (2016), we are continuously making internal changes to ensure TNO staff can maximize efforts in their respective areas. Several shifts in roles and responsibilities will ensure staff will not be working at cross purposes internally or with any external partners, and will help to better align TNO activities with the new strategic framework set out by MTCS. Our sub-regional partners are an important piece in delivering programs and we look forward to moving forward together.

I would like to thank all the members of the TNO Board as well as our staff for their dedication to tourism in beautiful Northern Ontario. Here's to another great year.

Yours in tourism,

Marty Kalagian,
President.



MESSAGE FROM THE EXECUTIVE DIRECTOR

2017/18 will be an exciting year for Tourism Northern Ontario. With the completion of the TNO organizational review, we are in an excellent position to align ourselves with the Ministry's new tourism framework and roll out a new marketing strategy to drive future business activities. This organizational restructuring will allow for greater collaboration, partnership and alignment for all areas of focus.

The new Strategic Implementation Plan will encourage a more holistic approach to our priority pillars. Support for investment attraction initiatives will now be streamlined with product development; marketing and communications will now be focused into one priority area; and we will continue to work on our training initiatives by building on the success of Tourism Excellence North (TEN). Partnerships will remain independent but of course, always take other priority pillar areas into consideration.

Product development remains one of our main areas of focus at TNO. Our research has supported a greater effort in this area and we are looking at innovative ways of helping the industry become market-ready in already competitive domestic and global markets. One of the main supporting programs for these developments falls under our training pillar with Tourism Excellence North (TEN). We have already seen great success within this program and have had over 150 industry stakeholders engaged.

Tourism Northern Ontario is moving forward with a new marketing plan which will aim to market strategically through evidence-based decision making, creating greater alignment and collaboration at the sub-regional and DMO levels with the OTMPC. This marketing plan has been discussed, carefully reviewed and shared with industry partners. Collectively, we are ready to work together to implement the new strategy with Tourism Northern Ontario as the lead.

With a renewed sense of enthusiasm, we look forward to the continued success in the delivery of our programs. We will remain responsive and adaptive to our industry's needs and accountable to the TNO Board of Directors and the MTCS.

Sincerely,

David MacLachlan,
Executive Director.

EXECUTIVE SUMMARY

In March 2016, Tourism Northern Ontario (TNO) retained CBRE Tourism & Leisure Group to analyze the current situation and performance of its organization in comparison to objectives and activities set out in its Strategic Implementation Plan (SIP) for 2015-2020, and to determine whether any significant changes needed to be made to the organizational structure and strategic focus of the organization under the new Strategic Direction for Marketing in Northern Ontario. In meeting these objectives, CBRE undertook a phased work program, focusing first on a diagnosis of the specific issues and challenges faced by TNO, and conducting an evaluation of TNO's performance in Year One of the SIP and progress on Year Two projects to date. The second phase involved the analysis of critical issues identified during the diagnosis, and development of an action plan to move forward with organizational change.

As part of the organizational review process, CBRE guided TNO's Board and Executive Director to revisit the organization's mandate and develop a new set of strategic goals to help achieve a revised Vision for Northern Ontario's tourism industry. TNO is looking to take a more innovative leadership role for the next three years to guide the tourism industry in Northern Ontario, particularly in Product Development and Training where the organization already excels (i.e. the TEN program) and to consolidate pillar initiatives in line with MTCS's Ontario Tourism Action Plan.

This business plan reflects the revised vision and mission for Tourism Northern Ontario.



**PLEASE REFER TO OUR
GLOSSARY OF ACRONYMS
(PAGE 59)**

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

TNO 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

Tourism 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."* TNO's Board also recognizes the following values as important aspects of the strategic plan:

- Accountability
- Leadership
- Teamwork
- Transparency
- Collaboration
- Integrity

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) are underway
- Streamlined services for operators are available

TNO'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)

Accountability, Leadership, Teamwork,
Transparency, Collaboration, Integrity

The following Strategic Goals were identified to highlight TNO's desired leadership role in Marketing and Communications, Product Development, Workforce Development and Partnerships, and will allow TNO to take on a supportive role in relation to Investment Attraction.

Strategic Goals

- 01 Establish TNO's role as industry leader under consolidated pillar priority areas: Marketing and Communications, Product Development, Training and Partnership development.
- 02 Implement a strategic approach to bring high quality products and experiences to market through strong partnerships and workforce training.
- 03 Generate industry research and monitor industry performance to continually improve products and experiences and evaluate success of TNO programs.
- 04 Establish organizational excellence through development of a corporate services division, and develop improved financial systems and performance measurements.
- 05 Build strength for the organization through human resources and specialized expertise under each of the dedicated pillar areas.
- 06 Foster communication and relationship-building in the tourism sector, to ensure industry stakeholders recognize TNO's role as a champion for growth, and have access to relevant resources and programs.

Tourism Northern Ontario's Board of Directors has endorsed this business plan which provides details with respect to five areas of focus for Tourism Northern Ontario:

- 01 **Governance**
(including Organizational Excellence)
- 02 **Product Development**
(includes Investment Attraction)
- 03 **Marketing & Communications**
- 04 **Workforce & Industry Training**
(through Tourism Excellence North)
- 05 **Partnerships**

TNO's business operations also examine its activities through the lens of the Ministry's Strategic Framework for Tourism in Ontario (2016) shifting the provincial focus to:

- 01 **Leverage our Resources**
- 02 **Convert the Market**
- 03 **Generate Future Market Demand**
- 04 **Define and Reduce Barriers to Economic Prosperity**

Strategic Goals

Budget

TNO receives a core funding allocation through the Ministry of Tourism, Culture and Sport (MTCS), 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 TNO's budget for the period April 1, 2017 through March 31, 2018. The total allocation for the region per MTCS for 2017-18 is \$4,874,164.00. However, it is expected TNO will leverage this investment by at least 50% through industry partnership as well as agreements with funding partners at both the federal and provincial level.



Budget (April 1, 2017 – March 31, 2018)

Area of Focus	\$	% MTCS Allocation
Governance & Administration	\$ 519,164	11%
Product Development (including Investment Attraction)	\$ 500,000	10%
Marketing & Communications	\$ 2,750,000	56%
Workforce Development	\$ 500,000	11%
Partnerships	\$ 605,000	12%
Total Eligible Expenses	\$4,874,164	100%
Partnership Contributions Goal (minimum \$605K)	\$ 2,400,000	50%
Total	\$7,274,164	150%

REGIONAL OVERVIEW & ASSESSMENT

Tourism is a major economic driver in Northern Ontario with receipts ranking higher per capita than other regions in the province. Tourism is the largest employer of young workers in the province and TNO’s research reveals **40%** of the workforce in the region as well as **one-in-five** businesses are tourism related. In 2014 there were **8.3 million** visits with tourism receipts totalling **\$1.5 billion**. Research in sub-region 13b indicates growth of approximately **7%** in 2013 and 2014 in the fixed-roof accommodation sector.



Total Visits & Spending

Region	Visits (millions) (2014)	Visitor Spending (billions) (2014)
Ontario	139.5	23.9
Region 13	8.2	1.5
Region 13 proportion of Total Ontario	5.9%	6.25%
Sub-region 13a proportion of Region 13	55%	51%
Sub-region 13b proportion of Region 13	20.5%	16%
Sub-region 13c proportion of Region 13	24.5%	33%

In 2014, there were **\$8.2 million** visits to Region 13, representing **5.9%** of total visits to **Ontario**

Sub-region **13a** accounted for the **largest proportion of visits & spending** in Region 13

Visitors to Region 13 spent **\$1.5 billion**, accounting for **6.25%** of total visitor spending in **Ontario**

TNO tracks industry performance through a combination of an annual survey and the monthly urban centre hotel performance reports. As TNO increases the inventory of reporting properties, these surveys will give a greater understanding of industry performance one to two years earlier than the regional tourism profiles. Overall trends seen are continued growth in all sectors in 13a and 13b with modest declines showing for rural product and modest growth for urban product in 13c.

In 2016, Destination Canada reports that world tourism grew by **3%** with Canada achieving a **12%** growth in 2016.

Region 13 Summary



Positive Trends in the Marketplace

- 2015/16 continued to see a low Canadian dollar, proving to be beneficial to tourism operators specifically in the Northwest (sub-region 13c) and Algoma-Sault Ste. Marie (sub-region 13b).
- American tourists continue to see RTO13 as a destination of choice, with US visitors contributing **9.4%** of all visits and **21.8%** of all spending in the region.
- Nature and outdoor activities, hunting and angling continue to be the top reason for visiting RTO13.
- In 2014, there were **8.2 million** visits in Region 13, accounting for **8.2%** of total visits to Ontario. Visitors to Region 13 spent **\$1.5 billion**, or **11%** of total visitor spending in Ontario. Visits were up **1.2%** compared to 2012.
- Ontario residents accounted for the majority of visits and spending, residents of "Other Canada" accounted for **8.4%** of visits and **10.5%** of spending, and overseas visitors accounted for less than **1%** of visits and **1%** of spending.
- Visitors spent an average of **\$191/trip**. Overnight visitors spent over **3x** as much per trip as same-day visitors (**see Table 4**).
- The largest proportions of expenditures were spent on food and beverage and transportation.
- **40%** of Ontario visitors to Region 13 reside in sub-region 13a, **18%** in sub-region 13c and **9%** in sub-region 13b.
- One in every five businesses is tourism related in RTO13.
- **56%** of "Other Canada" visitors came from Manitoba with **41%** from Winnipeg (2012).
- **77%** of U.S. visitors came from Border States with **28%** from Minnesota and **26%** from Michigan (2012).

Over an 18-month period during 2014/15, Tourism Northern Ontario commissioned research studies to provide situation analyses for a variety of tourism sectors of interest to the region:

- **Festivals & Events** (2014)
- **Motorcycle Touring** (2014)
- **Hunting** (2014)
- **Angling** (2015)
- **Snowmobile Touring** (2014)
- **Nature & Outdoors** (2015)
- **Visit Friends & Relatives (VFR) Tourists** (2015)
- **Major Urban Centre Tourists** (2015)
- **Overview of other Tourism-Related opportunities** (2015)

Tourism Northern Ontario used this body of research to develop several strategies that align with its priority pillars. These strategies have guided TNO in programming and initiatives related to each pillar and were a cornerstone in developing the new Strategic Implementation Plan:

- **2012** Digital Marketing Strategy
- **2012-2017** Northern Ontario Marketing Strategy
- **2014** Northern Ontario Product Development Strategy
- **2014** Northern Ontario Workforce and Industry Training Strategy
- **2014** Northern Ontario Wayfinding Strategy
- **2015** Investment Attraction Strategy



Challenges in Achieving Strategic Goals

In its 2012–2017 *Tourism Marketing Strategy*, Tourism Northern Ontario identified an interest in increasing utilization of non-private roofed accommodation and increasing the number of tourists who live outside the region. To achieve these goals, tourism businesses in Northern Ontario should consider the needs and interests of tourists who are already coming to the region and those who can be enticed to come.

Several overarching findings will influence Northern Ontario's ability to meet its growth objectives:

- The outdoors is a salient if not core element in the lure of Northern Ontario for tourists in each segment. Even pleasure tourists to the biggest cities in the North are more likely to engage in outdoor activities than in entertainment or cultural ones (see Table 1, pg 14).
- Many Canadian tourists are near-locals who billet with friends and relatives, stay in their private cottages, or in campgrounds in Northern Ontario. Conversely, American tourists in each segment tend to rely on paid roofed lodging during their stay (see Table 2, pg 15).
- Almost by definition, niche markets tend to be relatively small. For example, the markets for motorcycle touring and hunting are more limited than the markets for festivals and events, attractions or nature-based outdoor experiences.
- Some activities offered in Northern Ontario are more apt to be the reason for taking a trip whereas others tend to be one-of-many activities a tourist engages in on a trip driven by other purposes (i.e. fishing/hunting versus festivals and events).
- The physical realities of distance from major population centres, limited transportation corridors and climate restrict the size of potential markets for Northern Ontario.
- 2014 statistics show decreased visitation to sub-region 13c. TNO is confident that these numbers will increase during the next consensus as the sub-region experienced two favorable seasons (2015/16) due to a low Canadian dollar.
- The effect of a new presidential government in the United States remains unclear on the tourism industry in the North. Time will tell what challenges are associated with this change in office.

Table #1:



Tourism activities on overnight visits

	To Canada	To Northern Ontario	To Southern Ontario
Any outdoor activity	37%	52%	32%
Any hunting/fishing activity	7%	27%	7%
Fishing	6%	25%	6%
Hunting	1%	3%	*
Any nature-based activity ¹	24%	39%	31%
Any cultural/entertainment activity ²	16%	17%	25%
VFR	56%	39%	47%
Major urban tourists	1%	14%	N/A

Special Tabulations, Updated to TSRC 2013; ITS 2012 prepared by Research Resolutions.

*Less than 0.5%.

¹ Excludes hunting/fishing

² e.g., festivals, concerts, museums, historic sites, etc.



Table #2:



Northern Ontario's Overnight Tourists' Place of Residence

	Motorcycle	VFR	Angling		Nature-based		Major Urban Cities	Festival & Events	Attractions	Snowmobile	Hunting
	Total	Total	High Yield	All	High Yield	All	Total*	Total	Total	Canada Only*	Total*
Visitation	343,000	1.5M	960,000		955,00		908,000	299,000	430,000	**	76,000
Spend \$M	23.6M	262.0M	406.6M		208.0M		237.5M	110.3M	179.3M	**	37.0M
Canada	>0.5%	95%	32%	60%	72%	88%	89%	86%	65%	100%	85%
Ontario Toronto	20%	84%	60%	89%	58%	79%	78%	69%	54%	81%	84%
CMA Other	49%	13%	25%	36%	29%	39%	10%	11%	16%	4%	**
Southern Ontario	1%	34%	31%	26%	15%	5%	30%	24%	18%	37%	21%
Northern Ontario	50%	38%	4%	27%	14%	36%	38%	34%	20%	40%	64%
Winnipeg	**	3%	2%	8%	7%	9%	2%	3%	3%	12%	**
Other Canada	66%	8%	1%	3%	11%	7%	9%	14%	6%	7%	**
USA	40%	4%	68%	39%	24%	10%	10%	11%	31%	N/A	15%
Wisconsin	6%	**	7%	5%	3%	1%	1%	3%	4%	N/A	3%
Michigan	15%	1%	6%	4%	3%	2%	1%	1%	6%	N/A	3%
Illinois	**	**	7%	3%	**	**	**	**	**	N/A	**
Ohio	10%	**	5%	2%	4%	1%	**	1%	2%	N/A	**
Minnesota	9%	1%	17%	12%	2%	1%	3%	**	4%	N/A	4%
All Other USA	**	2%	26%	13%	12%	5%	5%	6%	15%		5%

Source: TSRC 2013; 2011/12 pooled; ITS US/OVS 2012, Anglers, Nature-Based TSRC 2010/ITS 2011 special tabulations provided by Research Resolutions. Figures for Motorcycle tourists TSRC 2013. American Snowmobilers are not available.
 * Small base size – interpret with caution.
 **Less than 0.5%.

The U.S. share increases substantially among all anglers (**39%**) and those who rely on paid roofed lodging (**High Yield Anglers, 68%**).

Few Americans are found in the nature-based segment overall (**10%**) but represent a considerably larger share of those who stay in commercial, roofed lodging (**High Yield Nature, 24%**).

American motorcycling tourists also account for a large segment of touring overnight visitors (**40%**).

Sub-Regional Market Shares

The North's sub-regions attract tourists in each segment at different rates, in part depending on their proximity to the U.S., available product and highway access to large population centres such as Toronto, Ottawa and Winnipeg (see Table 3; interpret with caution because some sample sizes are small).

Table #3:



Northern Ontario's Sub-Region Market Shares 2012/2013 Calendar Years (Updated)

% of Overnight Tourists in RTO13	Total	VFR	Anglers		Nature-based	
		Total	High Yield	All	High Yield	All
Northeast (13a)	50%	58%	32%	36%	52%	53%
North Central (13b)	18%	18%	12%	12%	34%	20%
Northwest (13c)	34%	25%	60%	54%	29%	32%

Source: TSRC 2013; 2011/12 pooled; ITS US/OVS 2012, Anglers, Nature-Based TSRC 2010/ITS 2011 special tabulations provided by Research Resolutions. Figures for Motorcycle tourists and American Snowmobilers are not available.

* Small base size – interpret with caution.

**Less than 0.5%.

Percentages may add to more than 100% because tourists spent nights in more than one sub-region.



Threats to Increased Visitation & Spending

There are many opportunities for potential tourists to find activities that are similar to those offered in Northern Ontario **closer to home**.

- Many of the North's festivals and events (e.g., film, fall fairs, dragon boat races) and attractions (e.g., general history museums, art galleries, casinos) are available in locations that are easier to reach than Northern Ontario for residents of Southern Ontario and markets such as New York, Pennsylvania, Ohio and southern Michigan.
- Similarly, many nature-based activities, hunting and fishing are available in terrains that closely resemble Northern Ontario's and can be found closer to where tourists live.
- Destinations with a longer fair weather season represent substantive competition for potential tourists in the motorcycle touring segment (e.g., southern U.S. states).
- While the extensive trail system and reliable snow cover in Northern Ontario should attract snowmobiling tourists, the high price of bringing equipment from home to the region and/or the high rental costs to obtain snowmobiles while in Northern Ontario are deterrents.

Table #4:



Average Spending by Tourists in Northern Ontario (All)

	Northern Ontario	Ontario
Average Per Person	\$182.00 (+24%)	\$147.00
Average Per Person Overnight	\$272.00 (+28%)	\$212.00

Ontario Regional Profiles, MTCS 2014.

STRATEGIC OVERVIEW

Governance & Administration

2017/2018 Budget **\$519,164 (11%)**

Strategic Focus

- 01** Establish organizational excellence through development of a Corporate Services division and develop improved financial systems and performance measurements.
- 02** Build strength for the organization through human resources and specialized expertise under each of the dedicated pillar areas.

An additional modification in TNO's new Three-Year Strategic Plan is the consolidation of Governance, Organizational Excellence and Outreach initiatives within a new Corporate Services pillar area, under the direction of the Executive Director and a dedicated Corporate Services Senior Coordinator/ Acting Executive Director. Creating a single Corporate Services pillar allows TNO to consolidate activities that are currently spread through both internal staff and external consulting roles, such as accounting and payroll. Combining the Corporate Services Senior Coordinator position with an Acting Executive Director role also demonstrates seniority and fulfills governance issues (i.e. succession planning for the Executive Director).

Overall objectives for this pillar area include: ensuring general compliance with organizational

policies for Board, staff and working groups; implementing and monitoring the new staffing plan, and ensuring appropriate resource allocation (human and financial) for TNO-related activities; continuous improvement of existing financial and reporting systems; maintenance of contract obligations and implementation of remedial action if required, and establishment and maintenance of quantifiable performance metrics for the organization, in order to ensure programs are successful and industry is benefitting from TNO initiatives. Another important aspect of Corporate Services is to ensure general organizational excellence, ensuring staff and Board demonstrate leadership and adhere to professional standards, and that the organization continues to monitor its impact on operators, tourists and other industry stakeholders through outreach initiatives.



Governance & Administration

Objective

Establish organizational excellence through development of a Corporate Services division and develop improved financial systems and performance measurements by building strength for the organization through human resources and specialized expertise under each of the dedicated pillar areas.

Priority Action Area

Enhance organizational excellence, with consistent adherence to Board policies and procedures, and compliance with provincial Conflict of Interest policies.

Key Activities	Activity	Q1	Q2	Q3	Q4
Develop new HR policy and update TNO Operating Policy Manual.	New	●	●	●	●
Continue to adhere to Board policies, selection criteria and commitment of Board, committees and working groups.	Continued	●	●	●	●
Ensure Board meetings focus on strategy implementation.	Continued	●	●	●	●
Review succession planning for Board and Executive Director.	Continued	●	●	●	●
Continue annual performance reviews for Board Members and Executive Director.	Continued	●			●
Encourage regular evaluation processes for all staff members and Executive Director.	Continued	●			●

Priority Action Area

Ensure service contracts with outside organizations reflect TNO Vision and Mission.

Key Activities	Activity	Q1	Q2	Q3	Q4
Review all service contracts and ensure roles are clearly outlined.	Continued	●	●	●	●
Define working groups and confirm membership annually.	Continued			●	●
Implement annual review of working groups.	New	●			●
Maintain remedial action process for contracts (use as needed).	Continued	●	●	●	●



Governance & Administration

Priority Action Area
 Implement and maintain revised staffing plan, and consistently monitor resource allocations to ensure long-term organizational sustainability.

Key Activities	Activity	Q1	Q2	Q3	Q4
Review resource needs for all TNO programs.	New	●	●	●	
Explore new funding opportunities with NOHFC and other sources.	New	●	●	●	●
Consider ways to improve budgeting, contract funding and internal financial management.	Continued	●	●	●	●
Continue to maintain a positive and productive workplace with dedicated staff, inclusive of regular staff meetings and performance reviews.	Continued	●	●	●	●
Update TNO organizational chart to align with Strategic Implementation Plan.	Continued	●		●	●
Ensure resources are available for grant writing assistance services as required.	Continued	●	●	●	●

Priority Action Area
 Establish quantifiable performance metrics with clear targets across all pillar areas, to ensure TNO strategic efforts are translating into improved regional performance.

Key Activities	Activity	Q1	Q2	Q3	Q4
Track performance for MTCS pillar initiatives with support of all TNO Senior Coordinators.	Continued	●	●	●	●
Establish two-way communication with operators.	Continued	●	●	●	●
Improve industry education on the importance of tourism.	Continued	●	●	●	●

Performance Measures

- Number of initiatives completed, on-time and on-budget compared to target.
- Attendance rate for Board, working group and committee meetings.
- Satisfaction levels with strategic initiatives by staff, Board, TNO working groups and committees and industry stakeholders.
- Number of stakeholders and dollars leveraged to plan, steer and undertake TNO initiatives.

Product Development

2017/2018 Budget: **\$500,000 (10%)**

Strategic Focus

- 01** Establish TNO's role as industry leader in tourism product development.
- 02** Implement a strategic approach to bring high quality products and experiences to market through strong partnerships.
- 03** Generate industry research and monitor industry performance to continually improve products and experiences, and evaluate success of TNO programs.

Over the next strategic planning cycle, TNO will be actively working to demonstrate leadership and strategic direction for activities related to Product Development and Research, and to provide support for Investment Attraction. Organizationally, this mandate falls under the realm of the new Product Development Senior Coordinator to liaise with TNO's Product Teams and manage all related Research, Product Development and associated partnership activities. TNO has spent the past three years growing "Product Teams" to develop strategies that will guide the development and enhancement of Northern Ontario tourism products and experiences in specific "best bet" product areas, as well as a strong research program to support product development opportunities in the Region. Ontario's Tourism Action Plan (2016) priority areas include developing tourism products and experiences and improving the quality of tourism data. TNO already has strong roots in these activity areas, and will continue to fulfill related objectives in the next three years.

In line with MTCS's goals for the industry, the focus of the Product Development Senior Coordinator over the next three years will be to: implement the strategic work underway with the Product Teams (e.g. Cycling, Auto and RV Touring, Gateways/Communities, Snowmobiling, etc.); move forward with efforts to standardize wayfinding across Northern Ontario; develop and monitor new ways of tracking industry performance (i.e. for the overall region and within operator groups) in order to make evidence-based decisions for product and experience development; and act as a support for investors in the tourism industry while encouraging entrepreneurship and tourism development.

The following chart identifies both the objectives and strategic action areas to guide initiatives over the next three years, along with performance measures to enable TNO to track success under each objective.



Product Development

Objective

Establish TNO's role as industry leader in tourism product development by implementing a strategic approach to bring high quality products and experiences to market through strong partnerships, championing growth and investment in the sector and by generating industry research, monitor industry performance to continually improve products and experiences, and evaluate success of TNO programs.

Priority Action Area

Continue efforts to translate strategic pillar work and target market research into action, and track results.

Key Activities	Activity	Q1	Q2	Q3	Q4
Conduct research on key industry issues related to TNO pillars.	New	●	●	●	●
Continue "best bet" product and experience research.	Continued	●	●	●	●
Research new methods of industry performance tracking through partnership initiatives.	New	●	●	●	●

Priority Action Area

Develop and implement a Strategic Research Plan to track tourism business performance

Key Activities	Activity	Q1	Q2	Q3	Q4
Continue to update operator database / inventory by sub-region.	Continued	●	●	●	●
Establish and track new KPIs through Product Team research.	New	●	●	●	●
Continue Accommodation Performance Tracking by sub-region.	Continued	●			●
Research other methods of regional tourism business performance tracking.	New	●	●	●	●



Product Development

Priority Action Area

Maintain the momentum for Northern Ontario’s “experience” shift, by developing and enhancing “best bet” products and experiences as identified in TNO’s product development strategy and in alignment with the Strategic Direction for Marketing Northern Ontario Tourism.

Key Activities	Activity	Q1	Q2	Q3	Q4
Translate strategic pillar work, sector strategies and target market research into action through Product Teams.	Continued	●	●	●	●
Angling & Hunting: <ul style="list-style-type: none"> Define and develop criteria for best-in-class angling experiences. 	Continued	●	●	●	●
Culture & Heritage: <ul style="list-style-type: none"> Develop strategies for francophone and culinary tourism as “best bet” products and experiences. Identify and support product development activities for Group of Seven experiences. Identify and support product development for Indigenous tourism with Indigenous Tourism Ontario. 	Continued	●	●	●	●
Gateways & Communities: <ul style="list-style-type: none"> Inventory attractions and festivals and events. Develop strategies for attractions, festivals and events and VFR. 	Continued	●	●	●	●
International: <ul style="list-style-type: none"> Support product development activities to increase the inventory of market-ready international products and experiences. 	Continued	●	●	●	●
Nature and Adventure: <ul style="list-style-type: none"> Inventory nature and adventure experiences. Define and develop criteria for best-in-class nature and adventure experiences. 	Continued	●	●	●	●
Support research into new product / experiences areas.	Continued	●	●	●	●
Host 3rd annual product development symposium.	Continued		●	●	
Leverage funding from other resources.	New	●	●	●	●



Product Development

Priority Action Area

Set the foundation for Wayfinding across Northern Ontario.

Key Activities	Activity	Q1	Q2	Q3	Q4
Continue to develop Wayfinding standards for Northern Ontario.	Continued	●	●	●	●
Communicate and educate stakeholders on wayfinding toolkits: signage tool kit, map tool kit, resources tool kit.	Continued	●	●	●	●
Continue to work in partnership with organizations, communities and trail partners to improve tourism wayfinding to address gaps in print, digital and signage.	Continued	●	●	●	●
Refine and develop implementation plan for gateway wayfinding strategy.	Continued	●	●	●	●
Continue to include Wayfinding in outreach sessions.	Continued	●	●	●	●
Identify partnership initiatives and leverage funding sources for Wayfinding.	Continued	●	●	●	●

Priority Action Area

Communicate Northern Ontario Wayfinding Strategy, VIC strategy and initiate implementation in partnership with Northern Ontario Visitor Information Centres.

Key Activities	Activity	Q1	Q2	Q3	Q4
Use VIC strategy to develop and implement new training programs at Visitor Information Centres (including communication of strategy results and access to regional materials).	New	●	●	●	●
Continue to work with VICs to develop training and communications.	Continued	●	●	●	●
Ensure coordination across the Northern Ontario Visitor Information Centres in terms of programming, information, resources, etc. implementing VIC strategy.	Continued	●	●	●	●
Continue to increase the inventory of experiences hosted on the provincial app #DiscoverON.	Continued	●	●	●	●



Product Development

Priority Action Area

Support entrepreneurs and other stakeholders in Northern Ontario's investment community in a resource capacity.

Key Activities	Activity	Q1	Q2	Q3	Q4
Continue to build TNO Resource Centre on TNO website.	Continued	●	●	●	●
Invite partners and advisors to discuss relevant investment related topics at TNO Board meetings.	Continued	●	●	●	●
Ensure tourism has a recognized role in economic development plans for Northern Ontario.	Continued	●	●	●	●
Provide grant writing assistance services to organizations supporting TNO product development priorities.	Continued	●	●	●	●

Performance Measures

- Number of initiatives completed, on-time and on-budget compared to target.
- Number of new or enhanced market-ready products and/or experiences available for marketing.
- Number of stakeholders participating in product development activities and stakeholder satisfaction with progress.

Marketing

2017/2018 Budget: **\$2,750,000 (56%)**

Strategic Focus

- 01** Establish TNO's role as the industry leader in tourism marketing and communications for the region by fostering communication and relationship-building within the sector.
- 02** Align, coordinate and invest in marketing activities supporting implementation of the Strategic Direction for Tourism Marketing in Northern Ontario within the sub-regions, the region and aligning with provincial programming with OTMPC.

One of the most significant shifts in the new Three-Year Strategic Plan for Tourism Northern Ontario is TNO's direction to take a more strategic leadership role in guiding marketing and communications for the industry. TNO's Senior Marketing and Communications Coordinator will be required to implement the marketing recommendations in this strategy but also develop a new three-year Northern Ontario marketing strategy and oversee the development of a digital strategy for Northern Ontario, developing an annual tactical marketing plan, developing and maintaining marketing contracts for tactical initiatives across Northern Ontario, overseeing required marketing-related deliverables from contracted organizations to TNO, and managing all marketing and communications related activities including partnered initiatives. Building on TNO's Framework for Implementation of the Northern Tourism Strategic Direction 2017-2020, TNO's new Marketing Action Plan will focus on: implementation of pan-Northern initiatives under a "consumer-first" philosophy of seamless borders for the visitor, while supporting destination brands and related marketing; working closely

with OTMPC early in the planning cycle for the six priority product and experience areas; working within provincial branding activities to provide pan-Northern lure pieces to drive consumer planning (i.e. building on the "Where Am I" campaign to build awareness of Northern Ontario experiences); and engaging customized tactical service agreements under multi-year contracts to ensure consistent implementation of TNO's Marketing Plan.

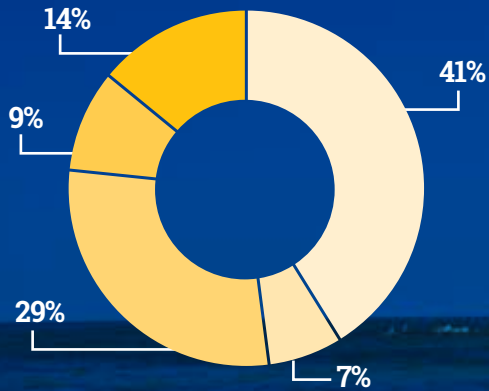
Other responsibilities of the Coordinator position include: directing and implementing external public relations programs; preparing communications and publicity related to strategic initiatives, research and special projects; monitoring the public climate and recommending communications with the goal to enhance TNO's public image in a professional and favourable light. Overall objectives for this pillar area include both aligning and coordinating marketing programs across the region, as well as undertaking outreach initiatives, to ensure both customers and operators are aware of TNO and regularly engage with the organization.

To this end TNO has completed an implementation plan for the Strategic Direction for Marketing Tourism in Northern Ontario (2017-2020). This plan identifies three areas of effort:

- 01 Strategic planning, implementation, performance and reporting.
- 02 Supporting destination brands at the provincial, regional and sub-regional levels.
- 03 Marketing priority products and experiences:
 - a) Angling & Hunting
 - b) Cultural & Heritage
 - c) Gateway & Urban Communities
 - d) Nature & Adventure
 - e) Touring

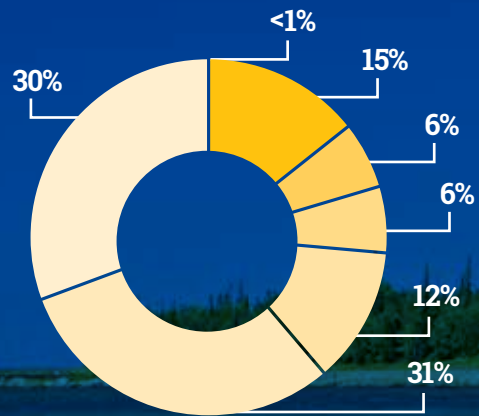
TNO will work with partners to develop a tactical marketing plan. A planning meeting was held January 9th, 2017. To date priorities have been determined in terms of investments by priority product/experience, geographic and consumer demographics and tactics. A second meeting was held February 2nd with OTMPC and the sub-regions to develop a tactical marketing plan for angling and a third meeting took place March 3rd to address culture and heritage. The remaining segments will be discussed by the end of March 2017, allowing for the completion of a tactical plan.

The end goal is a seamless plan that clearly identifies the marketing to be undertaken at each level. For example, there will be one angling plan reflecting work to be completed by OTMPC, TNO across the region and within each sub-region as well as how DMO partners are able to leverage these efforts. In the past TNO has identified a marketing allocation for each sub-region that allowed the sub-region to market independently of the other sub-regions. The new planning and implementation process clearly puts TNO in the leading role in terms of its marketing investments, effecting a positive change in accountability and performance.



Investment by Priority Segment

- 14% Touring
- 9% Cultural & Heritage
- 29% Gateway & Urban Communities
- 7% Nature & Adventure
- 41% Angling

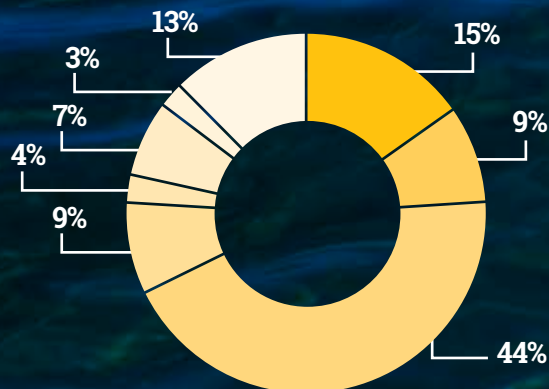


Investment by Geography

- 15% Northern Ontario
- 6% Rest of USA
- 6% Overseas
- 12% Rest of Canada
- 31% USA (Border States)
- 30% Ontario
- <1% Quebec

Investment by Tactic

- 15% Print & print media
- 9% Consumer touch
- 44% Digital media
- 9% Media relations (fam)
- 4% Out of home
- 7% TV & Radio
- 3% General
- 13% Partnership





Marketing Budget

Marketing Budget 2017-18

Strategic Planning & Evaluation	\$ 225,000
Destination Brands	\$1,150,000
Priority Products & Experiences	\$1,375,000
Total Core	\$2,750,000
Strategic Partnerships	\$ 275,000
Total Combined	\$3,025,000

Strategic Planning, Implementation, Performance, and Reporting

Activities under the marketing pillar will be overseen by the Senior Marketing and Communications Coordinator for Tourism Northern Ontario under the direction of the Executive Director. Tourism Northern Ontario will achieve fiscal efficiency through the employment of a Visual Communications Designer as opposed to contracting out for graphic design on a broad or as-needed basis. This will enable more activities to be completed in-house. Building on the strategic direction document, TNO will invest in a digital marketing strategy to address various websites, brands, etc. Performance will continue to be monitored through enhancements made to the on-line marketing planning portal. Additionally, TNO will move from data segmentation of Ontario consumers to US-based consumers for its various products and experiences as well as continuing to invest in successful e-commerce activities.

Destination Brands

Tourism Northern Ontario will continue to work with existing provincial and sub-regional brands, ensuring activities set the stage for successful marketing of Northern Ontario's unique products and experiences.

At a pan-Northern level, TNO will align, coordinate and partner with OTMPC in terms of branding, campaigns, operations and acquisition of content for northernontario.travel, working in international markets, acquiring digital photography and video and increasing the inventory of northern experiences on OntarioTravel.net and the #DiscoverON app (see Wayfinding initiative) as well as ensuring a presence on TripAdvisor.

Priority Products & Experiences

01 Angling & Hunting

Stakeholder Engagement:

Campaign development aided through engagement of sub-regional DMOs, OTMPC and sub-regional advisory or marketing committees in 13a, b and c.

Campaign Focus:

In alignment with OTMPC, facilitate connecting consumers with Northern Ontario's saleable angling and hunting experiences.

Media Campaign:

Media	Activity	Budget	%
Digital Media	Social media, paid placement, and digital content acquisition.	\$370,000	67%
Consumer Touch	Support five to six OTMPC-led consumer shows plus an additional two consumer shows per sub-region in target markets.	\$ 75,000	14%
Media Relations	Support additional media opportunities.	\$ 75,000	14%
Print	Support earned media fulfillment through display print ads.	\$ 30,000	5%
Total		\$550,000	100%

Objectives:

- **Increase in visitation to digital assets**
 - Websites
 - Social media channels
- **Increase in conversions on visits**
 - Referrals to angling and hunting experiences
 - Sales of angling and hunting packages
- **Increase in interactions with consumers at trade shows**
 - Increase in earned media
 - Enhance earned media through print advertising

Messaging:

Marketing under the Northeastern Ontario, Sault Ste. Marie–Algoma and Northwest Ontario destination brands.

Target Markets:

Southern Ontario and U.S. border states.

Target Demographics:

Avid/Niche Travellers

Performance Metrics:

- Website visits and conversions
- Consumer Interactions
- Value and reach of earned media
- Package sales

02 Culture & Heritage

Stakeholder Engagement:

Campaign development aided through engagement of sub-regional DMOs, OTMPC and sub-regional advisory or marketing committees in 13a, b and c.

Campaign Focus:

In alignment with OTMPC, facilitate connecting consumers with Northern Ontario's saleable cultural and heritage tourism experiences specifically francophone Group of Seven with Indigenous as a priority for market development.

Media Campaign:

Media	Activity	Budget	%
Digital Media	Social media, paid placement, and digital content acquisition.	\$ 50,000	50%
	Develop an Indigenous tourism portal on northernontario.travel that can feature Northern Ontario's Indigenous tourism experiences.	\$ 10,000	10%
	Partner with OTMPC in a provincial digital campaign marketing Group of Seven experiences representing Northern Ontario product under the "Group of Seven Continues" brand.	\$ 25,000	25%
	Develop and implement a digital campaign marketing Group of Seven experiences in 13b under the "Moments of Algoma" brand.	\$ 10,000	10%
Print Media	Print and distribute up to 5000 maps which have been developed to market the 13b Group of Seven "Moments of Algoma" experiences.	\$ 5,000	5%
Total		\$100,000	100%

Objectives:

- **Develop Indigenous tourism portal on northernontario.travel**
- **Increase in visitation to digital assets**
 - Websites
 - Social media channels
- **Increase in conversions on visits**
 - Referrals to culture and heritage experiences
 - Sales of culture and heritage packages
- **Develop and distribute Group of Seven driving tour map**

Messaging:

Francophone and Indigenous product to be marketed via northernontario.travel. Group of Seven continues product marketing under the "Group of Seven Continues" brand.

Target Markets:

- Francophone – Northern Ontario and Quebec
- Group of Seven – Ontario

Target Demographics:

Connected Explorers, Knowledge Seekers, Up-and-Coming Explorers

Performance Metrics:

- Website visits and conversions
- Package sales

03 Gateways & Communities

Stakeholder Engagement:

Campaign development aided through engagement of sub-regional DMOs, OTMPC and sub-regional advisory or marketing committees in 13a, b and c.

Campaign Focus:

In alignment with OTMPC, facilitate connecting consumers with Northern Ontario's saleable tourism products and experiences specifically attractions, festivals and events, meetings, conventions and sporting events.

Media Campaign:

Media	Activity	Budget	%
Digital Media	Digital media campaign focusing on Northern Ontario's lead demand generator attractions. Ensuring secondary attractions featured on TNO-supported digital channels.	\$150,000	37%
Consumer Touch	Support attendance at key trade events.	\$100,000	25%
Media Relations	Support additional media opportunities.	\$ 75,000	19%
Print	Support lure and fulfillment through display print ads leveraging earned media. Incremental printing of local guides for in-market distribution.	\$ 75,000	19%
Total		\$400,000	100%

Objectives:

- Increase in visitation to digital assets and conversions/sales
- Increase in interactions with event managers and travel trade at trade shows
- Increase in number of event bids won

Messaging:

Marketing under the Northeastern Ontario, Sault Ste. Marie–Algoma and Northwest Ontario destination brands

Target Markets:

Ontario and U.S. border states.

Target Demographics:

- Connected Explorers, Up-and-Coming Explorers, Knowledge Seekers, and Nature Lovers
- Meeting and event planners

Performance Metrics:

- Website visits and conversions
- Trade interactions, package sales, number of successful bids, room nights and economic impact of events
- Value and reach of earned media.

04 Nature & Adventure

Stakeholder Engagement:

Campaign development aided through engagement of sub-regional DMOs, OTMPC and sub-regional advisory or marketing committees in 13a, b and c.

Campaign Focus:

In alignment with OTMPC, facilitate connecting consumers with Northern Ontario's saleable nature and adventure experiences.

Media Campaign:

Media	Activity	Budget	%
Digital Media	Social media, paid placement, and digital content acquisition.	\$ 75,000	50%
Consumer Touch	Support five to six OTMPC-led consumer shows plus additional two consumer shows per sub-region in target markets.	\$ 30,000	20%
Media Relations	Support additional media opportunities.	\$ 30,000	20%
Print	Support earned media fulfillment through display print ads.	\$ 15,000	10%
Total		\$150,000	100%

Messaging:

Marketing under the Northeastern Ontario, Sault Ste. Marie–Algoma and Northwest Ontario destination brands.

Target Markets:

Southern Ontario and U.S. border states.

Objectives:

- **Increase in visitation to digital assets**
 - Websites
 - Social media channels
- **Increase in conversions on visits**
 - Referrals to nature and adventure experiences
 - Sales of nature and adventure packages
- **Increase in interactions with consumers at trade shows**
- **Increase in earned media**
- **Enhance earned media through print advertising**

Target Demographics:

Avid/Niche Travellers

Performance Metrics:

- Website visits and conversions
- Consumer Interactions
- Value and reach of earned media
- Package sales

05 Touring

Stakeholder Engagement:

Campaign development aided through engagement of sub-regional DMOs, OTMPC and sub-regional advisory or marketing committees in 13a, b and c.

Campaign Focus:

In alignment with OTMPC, facilitate connecting consumers with Northern Ontario's inventoried touring routes and saleable experiences.

Objectives:

- **Increase in visitation to digital assets**
 - Websites
 - Social media channels
- **Increase in conversions on visits**
 - Referrals to touring experiences
 - Sales of touring packages
- **Increase in interactions with consumers at trade shows**
- **Increase in earned media**
Enhance earned media through print advertising

Media Campaign:

Media	Activity	Budget	%
Digital Media	Social media, paid placement, and digital content acquisition.	\$ 90,000	45%
Consumer Touch	Support OTMPC-led consumer shows plus one additional consumer show per sub-region in target markets.	\$ 40,000	20%
Media Relations	Support earned media opportunities.	\$ 20,000	10%
Print	Support earned media fulfillment through display print ads to leverage earned media. Updating and printing of Northern Ontario adventure map.	\$ 50,000	25%
Total		\$200,000	100%

Messaging:

Marketing under the Northeastern Ontario, Sault Ste. Marie–Algoma and Northwest Ontario destination brands

Target Markets:

Ontario and U.S. border states.

Target Demographics:

- Avid/Niche Travellers
- Connected Explorers, Up-and-Coming Explorers, Knowledge Seekers, and Nature Lovers

Performance Metrics:

- Website visits and conversions
- Consumer Interactions
- Value and reach of earned media
- Package sales



Marketing

Objective

Establish TNO's role as industry leader in tourism product development by implementing a strategic approach to bring high quality products and experiences to market through strong partnerships, championing growth and investment in the sector and, by generating industry research, monitor industry performance to continually improve products and experiences, and evaluate success of TNO programs.

Priority Action Area

Implement new three-year Marketing Strategy in partnership with OTMPC and other industry stakeholders by continuing to plan, align and coordinate programs/tactics common to all sub-regions, and encourage collaborative marketing intra-regionally – leading with products/experiences.

Key Activities	Activity	Q1	Q2	Q3	Q4
Senior Marketing and Communications Coordinator coordinates and implements three-year Marketing Strategy including developing an annual marketing action plan.	New	●	●	●	●
Visual Communications Designer fulfills TNO's graphic design needs.	New	●	●	●	●
Develop and implement digital strategy for TNO's digital assets.	New	●	●	●	●
Gather feedback from consumers on experiences in Northern Ontario.	Continued	●	●	●	●
Monitor performance, making evidence-based decisions.	Continued	●	●	●	●
Review results of Data Segmentation project and consider areas for growth.	Continued	●	●	●	●
Continue to support e-commerce development and vehicles that connect consumers to saleable products and experiences	Continued	●	●	●	●
Monitor Product Team initiatives and pool resources for marketing.	Continued	●	●	●	●
Continue to share best practices across the region.	Continued	●	●	●	●



Marketing

Priority Action Area

Develop and implement a tactical marketing plan that supports connecting consumers to priority products and experiences through Northern Ontario's destination brands.

Key Activities	Activity	Q1	Q2	Q3	Q4
Continue alignment of marketing activities with Ontario Yours to Discover and Where Am I? where possible to leverage destination branding.	New	●	●	●	●
Assume management of regional content on OntarioTravel.net.	New	●	●	●	●
Continue to support NorthernOntario.travel including e-commerce capabilities as the lead Northern Ontario web portal in partnership with OTMPC.	New	●	●	●	●
Continue international marketing focussing on overseas and US travel trade initiatives.	Continued	●	●	●	●
Review digital imagery needs to identify a plan to acquire, store and share Northern Ontario digital imagery in partnership with OTMPC.	Continued	●	●	●	●
Review results of TripAdvisor initiative and consider areas for growth.	Continued	●	●	●	●
Work with sub-regional DMOs to identify and implement tactics that support destination brands in the regions.	Continued	●	●	●	●
<ul style="list-style-type: none"> • 13a – Continued investment in digital media (website and social), print media (lure guide) and digital photography and video acquisition that supports a market presence for 13a. • 13b - Continued investment in digital media (website and social) and digital photography and video acquisition that supports a market presence for 13b • 13c – Continue to host four USA network television shows featuring Northwest Ontario angling opportunities and air Northwest Ontario angling television commercial, support continued digital media focussing on the alignment/merging of the Northwest Ontario brands, and support a new Northwest Ontario lure print piece. 					



Marketing

Priority Action Area

Develop and implement a tactical marketing plan that supports connecting consumers to priority products and experiences in alignment and coordination of provincial OTMPC programming.

Key Activities	Activity	Q1	Q2	Q3	Q4
Develop and implement tactical plan in partnership with OTMPC and leading DMOs for each of angling and hunting, culture and heritage, gateways and communities, nature and adventure, and touring as Northern Ontario's priority products/experiences.	Continued	●	●	●	●
Develop, implement, monitor and report on a tactical marketing plan for Northern Ontario's angling and hunting experiences featuring digital media, consumer touch, media relations and print media.	Continued	●	●	●	●
Develop, implement, monitor and report on a tactical marketing plan for Northern Ontario's culture and heritage experiences (francophone, Indigenous and Group of Seven) utilizing digital and print media.	Continued	●	●	●	●
Develop, implement, monitor and report on a tactical marketing plan for Northern Ontario gateways and communities focussing on attractions, festivals and events as well as the meeting and sports tourism segments, utilizing digital media, media relations, print media and working with the travel trade.	Continued	●	●	●	●
Develop, implement, monitor and report on a tactical marketing plan for Northern Ontario's nature and adventure experiences focussing on digital media, consumer touch, media relations and print media.	Continued	●	●	●	●
Develop, implement, monitor and report on a tactical marketing plan for Northern Ontario's identified inventoried touring routes focussing on auto and RV, cycling, motorcycle and snowmobile experiences utilizing digital media, print media, consumer touch and media relations.	Continued	●	●	●	●



Marketing

Priority Action Area

Improve communication and outreach to the Northern Ontario tourism industry; operators, consumers, government at all levels, funders and other tourism partners.

Key Activities	Activity	Q1	Q2	Q3	Q4
Continue to review, enhance and implement TNO's Communication Plan.	Continued	●	●	●	●
Review channels for two-way communication with operators.	Continued	●	●	●	●
Improve engagement with francophone and Indigenous operators and visitors to the region.	Continued	●	●	●	●
Survey operators to provide positive experience with TNO for further outreach.	Continued	●			●

Priority Action Area

- Number of marketing activities completed on-time and on-budget compared to target.
- Number of stakeholders participating and satisfaction with marketing activities.
- Performance metrics compared to target.





Marketing (area of focus & activity)

Strategic Implementation	Budget
Coordination	\$ 75,000.00
Graphic Design	\$ 50,000.00
Digital Strategy	\$ 25,000.00
Performance	\$ 25,000.00
Data Segmentation	\$ 25,000.00
Packaging & On-line Sales	\$ 50,000.00
	\$250,000.00
Destination Brands	
NorthernOntario.travel	
Operations	\$ 100,000.00
Content Acquisition	\$ 420,000.00
Digital Media (sub-regional)	\$ 175,000.00
Print Media	\$ 100,000.00
Media Relations	\$ 35,000.00
Digital Imagery	\$ 45,000.00
Trip Advisor	\$ 25,000.00
International Markets	\$ 50,000.00
Alignment with Provincial Brands	\$ 100,000.00
	\$1,050,000.00



Marketing (area of focus & activity)

Priority Products & Experiences

Angling & Hunting

Digital Media	\$ 370,000.00
Consumer Touch	\$ 75,000.00
Media Relations	\$ 75,000.00
Print Media	\$ 30,000.00

\$ 550,000.00

Culture & Heritage

Digital Media	\$ 90,000.00
Print	\$ 10,000.00

\$ 100,000.00

Gateway & Communities

Digital Media	\$ 150,000.00
Consumer Touch (Trade)	\$ 100,000.00
Media Relations	\$ 75,000.00
Print Media	\$ 75,000.00

\$ 400,000.00

Nature & Adventure

Digital Media	\$ 75,000.00
Consumer Touch	\$ 30,000.00
Media Relations	\$ 30,000.00
Print	\$ 15,000.00

\$ 150,000.00

Touring

Digital Media	\$ 90,000.00
Consumer Touch	\$ 40,000.00
Media Relations	\$ 20,000.00
Print	\$ 50,000.00

\$ 200,000.00

Industry Communication

Industry Communications	\$ 50,000.00
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\$ 50,000.00

Total Budget \$2,750,000.00

Workforce & Industry Training

2017/2018 Budget: **\$500,000 (10%)**

Strategic Focus

- 01** Establish TNO's role as industry leader in workforce and industry training.
- 02** Implement a strategic approach to bring high quality products and experiences to market through strong partnerships and workforce training.

One of TNO's most notable accomplishments over the past three years has been the development of the Tourism Excellence North (TEN) program in conjunction with RTO 12 and with support from FedNor and the NOHFC. Earlier this year, Ontario Premier Kathleen Wynne contacted TNO to recognize the TEN project with the idea of expanding it to other parts of the province. In line with the original program plan for TEN, training solutions have been put in place and a full-time TEN Coordinator was hired for the 2016/17 fiscal year. In an effort to consolidate Industry Training and Workforce Development efforts undertaken by the organization with the TEN program, TNO's new Three-Year Strategic Plan involves fulfilling objectives under a single Training/TEN pillar area, with a dedicated Training/TEN Senior Coordinator at the helm. Coordination, training development and marketing costs are funded through agreements with FedNor and the NOHFC.

Primary objectives for this pillar area include development and implementation of a three-year business plan for the TEN program; providing logistical support for training and reporting on outcomes of TEN; coordinating, monitoring and promoting other relevant training programs for tourism industry stakeholders, in line with TNO initiatives (i.e., training for accommodation performance monitoring, wayfinding at Visitor Information Centres, etc.); and leveraging funding in support of TNO training-related initiatives.

The following charts identify both the objectives and strategic action areas to guide initiatives over the next three years, along with performance measures to enable TNO to track success under each objective.



Workforce & Industry Training

Objective

Establish TNO's role as industry leader in workforce and industry training by implementing a strategic approach to bring high-quality products and experiences to market through strong partnerships and workforce training that support TNO's product development priorities.

Priority Action Area

Continue to develop the Tourism Excellence North (TEN) program to implement a "quality shift" across Northern Ontario, building consistent quality offerings and customer experiences.

Key Activities	Activity	Q1	Q2	Q3	Q4
Implement TEN business plan in line with TNO's Strategic Plan and refresh as necessary.	Continued	●	●	●	●
Develop and share an additional seven case study tutorial videos.	Continued	●	●	●	●
Develop and deliver an additional five group learning opportunities including two best practice missions, two group learning sessions for operators and one group learning session for communities.	Continued	●	●	●	●
Ensure all communication, marketing and curriculum is available in both English and French.	Continued	●	●	●	●
Continually assess performance of the TEN program and make adjustments to programming as necessary.	Continued	●	●	●	●
Encourage training and information sharing aligned with the TEN program.	Continued	●	●	●	●

Priority Action Area

Ensure training needs associated with Product Development strategies are met through TEN and other TNO initiatives.

Key Activities	Activity	Q1	Q2	Q3	Q4
Review training needs for product team, wayfinding and research initiatives, and create annual training plans.	Continued	●	●	●	●
Integrate and develop curriculum for nine Product Development priority sectors into TEN plans.	New	●	●	●	●
Assess operator and trainer satisfaction with TNO training initiatives.	New	●	●	●	●



Workforce & Industry Training

Priority Action Area

Work in collaboration with regional partners to leverage funding resources in support of tourism-related training for TNO programs.

Key Activities	Activity	Q1	Q2	Q3	Q4
Reach out to workforce planning boards across the region.	Continued	●	●	●	●
Review results of TEN and plan for future sustainability.	New	●	●	●	●
Consider opportunities for sponsorship and aligning training with OTEC and Northern Ontario colleges	New	●	●	●	●
Explore NOHFC and FedNor funding for other training initiatives.	New	●	●	●	●

Priority Action Area

Foster awareness and knowledge of available resources, programs and training opportunities.

Key Activities	Activity	Q1	Q2	Q3	Q4
Continue to maintain a training resource centre including a calendar of tourism-related training and relevant educational events, inventory of training opportunities and TEN resources.	Continued	●	●	●	●
Maintain a plan to communicate training opportunities relevant to TNO and get operator feedback.	Continued	●	●	●	●

Performance Measures

- Number of TNO training initiatives completed on-time and on-budget compared to target.
- Number of stakeholders participating in and showing satisfaction with TNO training activities.
- Number of stakeholders reporting business improvements as a result of TNO training activities.

Partnerships

2017/2018 Budget: **\$605,000 (12%)**

Strategic Focus

- 01** Establish TNO's role as industry leader under consolidated pillar priority areas: Marketing and Communications, Product Development, and Training through partnership development that reflect TNO strategic priorities.

Although the Partnership Program is a common source of funding amongst RTOs, TNO has well exceeded MTCS's matching contribution of **\$605,000**. In 2015/16, the value of TNO partnerships grew to **\$3.1 Million**, over **\$1.4 Million** in 2014/15 (**120% increase**), and the number of partnerships increased from **62** to **79**. Given the importance of partner relationships to leveraging implementation of TNO sponsored initiatives, and the financial value attached to these partnerships, TNO requires a dedicated Partnership Senior Coordinator to maintain them.

As such, the primary objective for this pillar is to continue to build long-term relationships and focus on all pillar areas, ensuring that TNO's reach is extended beyond traditional partners on an annual basis. Building a new business plan for leveraging funding annually, integrating in-depth tracking in line with other TNO pillar objectives, and targeting an increase in leveraged funding of **5%** per annum, are important components of ensuring continued success of the Partnership Program.



The following chart identifies both the strategic action areas to guide initiatives over the next three years, and proposed budgets for initiatives in the first fiscal year (2017/18), inclusive of an allocation for salaries and wages.



Partnerships

Objective

Establish TNO's role as industry leader under consolidated pillar priority areas: Marketing and Communications, Product Development, Training, through partnership development that reflect TNO strategic priorities.

Priority Action Area

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

Key Activities	Activity	Q1	Q2	Q3	Q4
Review partnership program and partner project application parameters annually.	Continued	●	●		
Track results of partnership initiatives.	Continued	●	●	●	●
Maintain long-term partner relationships.	Continued	●	●	●	●
Build long-term relationships with non-traditional industry partners and leverage funding opportunities (beyond NOHFC and FedNor).	Continued	●	●	●	●
Increase amount of leveraged funding by minimum 5% per annum.	Continued	●	●	●	●

Performance Measures

- Number of partnership program initiatives completed on-time and on-budget compared to target.
- Number of stakeholders participating in and their satisfaction with partnership initiatives.
- Value of partnership projects (increase in total \$ leveraged).
- Diversity of partnership initiatives by priority pillar.



Partnerships

Objective

Identify partners to participate in the development and implementation of priority partnered marketing initiatives that support core marketing activities and that are aligned with the Strategic Direction for Marketing Tourism in Northern Ontario 2017-20.

Priority Action Area

Leverage resources to work with identified partners to define, plan and implement marketing and communications initiatives that will lead to increased visibility and advancement of the tourism sector in Northern Ontario under the "Tourism Rocks" banner.

Key Activities	Activity	Q1	Q2	Q3	Q4
Review previous fiscal initiative.	Continued	●	●	●	●
Develop a multi-media campaign utilizing social, print, television and radio media.	Continued	●	●	●	●
Continue distribution of Tourism Rocks tool-kit.	Continued	●	●	●	●

Priority Action Area

In partnership with NOHFC, OTMPC, Algoma Country, and industry operators work with Lindner Media to establish a new "Ontario Experience" television show featuring Northern Ontario angling and hunting experiences to air on US Networks. TNO will match the operator contributions and stack contributions from NOHFC and

Key Activities	Activity	Q1	Q2	Q3	Q4
Identify 13 operators to be featured on 13 unique episodes.	New	●			
Production company to film and edit 13 episodes.	New		●	●	
Production company to air episodes on identified US networks with a minimum of three airings per episode.	New			●	●
Production company will also develop a commercial of each operator, recognize Ontario, Canada, implement a social media campaign and provide a copy of each show and related video for the use of all partners.	New			●	●



Partnerships

Priority Action Area

In partnership with OTMPC and identified industry partners develop digital marketing campaigns that reflect the provincial brand position, “Where Am I?”. TNO will match industry contributions and stack OTMPC financial or in-kind contributions.

Key Activities	Activity	Q1	Q2	Q3	Q4
Identify industry partners.	New	●	●		
Work with OTMPC and agency to develop creative and digital media campaign.	New	●	●	●	
Implement and monitor campaign.	New	●	●	●	●

Priority Action Area

In partnership with OTMPC, Porter Airlines and identified gateway communities develop a multi-media marketing campaign connecting consumers with Northern Ontario tourism experiences.

Key Activities	Activity	Q1	Q2	Q3	Q4
Identify industry partners.	Continued	●			
Work with OTMPC, Porter Airlines and partners to develop creative and media campaign.	Continued	●	●		
Implement and monitor campaign.	Continued		●	●	

Priority Action Area

In partnership with OTMPC, CTV Northern Ontario and identified industry partners undertake a television media campaign aimed at Northern Ontario residents featuring Northern Ontario destinations for the spring, summer and fall seasons under the Stay2Play banner. TNO will match industry partner contributions stacking OTMPC and CTV financial and in-kind contributions. A feature will also be weekly news stories featuring tourism supporting advancement for the sector.

Key Activities	Activity	Q1	Q2	Q3	Q4
Identify 15 operators to be featured.	Continued	●	●		
CTV to film and edit promotional segments and commercials for operators, sub-regions, and region/province.	Continued		●	●	
CTV to air said commercials and promo pieces a minimum of 58 times weekly.	Continued		●	●	
CTV to air a 15 second commercial digitally before news stories on website.		●	●	●	●



Partnerships

Priority Action Area

In partnership with Sunset Country and to support marketing activities for angling and hunting undertake a multi-media campaign promoting angling hunting in the region utilizing print, television and digital media.

Key Activities	Activity	Q1	Q2	Q3	Q4
Develop and implement media campaign.	New	●	●	●	●

Performance Measures

- Marketing, visitation and conversion metrics compared to target.
- Number and value of packages sold.

Objective

Identify partners to develop and implement initiatives that support TNO's product development priorities.

Priority Action Area

Work with communities, regions and other entities to develop and implement wayfinding signage strategies at the community level utilizing TNO's wayfinding signage tool kit. Matching community contributions and FedNor funding.

Key Activities	Activity	Q1	Q2	Q3	Q4
Complete implementation with Town of Blind River.	Continued	●	●	●	
Develop and implement wayfinding signage strategies for Schreiber, Terrace Bay, Mattawa-Bonfield, Hearst, and East Ferris.	New	●	●	●	●

Priority Action Area

Work with Northern Ontario trail partners to develop and implement tourism wayfinding strategies including print, digital and signage to improve wayfinding and supporting connections to tourism experiences and support services. TNO will match partner contributions.

Key Activities	Activity	Q1	Q2	Q3	Q4
Support hiking trail wayfinding working with Casque Isles and the Ontario Trails Coalition.	New	●	●	●	
Support cycling trail wayfinding working with Manitoulin Cycling Advocates Association.	New	●	●	●	●
Support snowmobile, ATV and off-road motorcycle wayfinding working with towns of Dubreuilville and Cochrane (Northeast Community Network).	New	●	●	●	●



Partnerships

Priority Action Area

Work with Northern Ontario communities and other entities to develop regional culinary food strategies connecting agriculture and tourism and supporting increased culinary quality in the North.

Key Activities	Activity	Q1	Q2	Q3	Q4
Develop strategies/plans for Sudbury and North Bay Regions.	New	●	●	●	●
Develop and stage a food forum for the Hearst region similar to 2016-17 events.	New	●	●	●	●

Priority Action Area

Work with identified partners to develop strategic plans that support TNO's priority sectors and or pillars.

Key Activities	Activity	Q1	Q2	Q3	Q4
Develop a tourism plan for the Northshore region of Lake Superior in partnership with Parks Canada and eleven communities and First Nations.	New	●	●	●	●
Develop in partnership with NOTO a sector strategy.	New	●	●	●	●
Develop in partnership with Algoma Country and Superior Country new business and marketing plans.	New	●	●	●	●

Performance Measures

- Number of partnership program initiatives completed on-time and on-budget compared to target.
- Number of stakeholders participating in and their satisfaction with partnership initiatives.



Partnerships

Objective

Continue to support Northern Ontario tourism workforce and industry training priorities through the implementation of partnered initiatives.

Priority Action Area

Identify partners who in partnership with TNO can deliver partnered industry training activities at the Northern Ontario Tourism Summit.

Key Activities	Activity	Q1	Q2	Q3	Q4
Identify training gaps and training partners who can deliver training to address gaps.	Continued	●	●	●	

Deliver training.

Priority Action Area

Support the provincial Group of Seven Continues marketing initiative through partnered industry training activities with identified training partners.

Key Activities	Activity	Q1	Q2	Q3	Q4
Identify training priorities from product plans.	New	●	●	●	●
Develop and deliver training.	New	●	●	●	●

Performance Measures

- Number of partnership program initiatives completed on-time and on-budget compared to target.
- Number of partners participating in and their satisfaction with partnership initiatives.
- Number of stakeholders trained and their satisfaction with training.



Business Operations

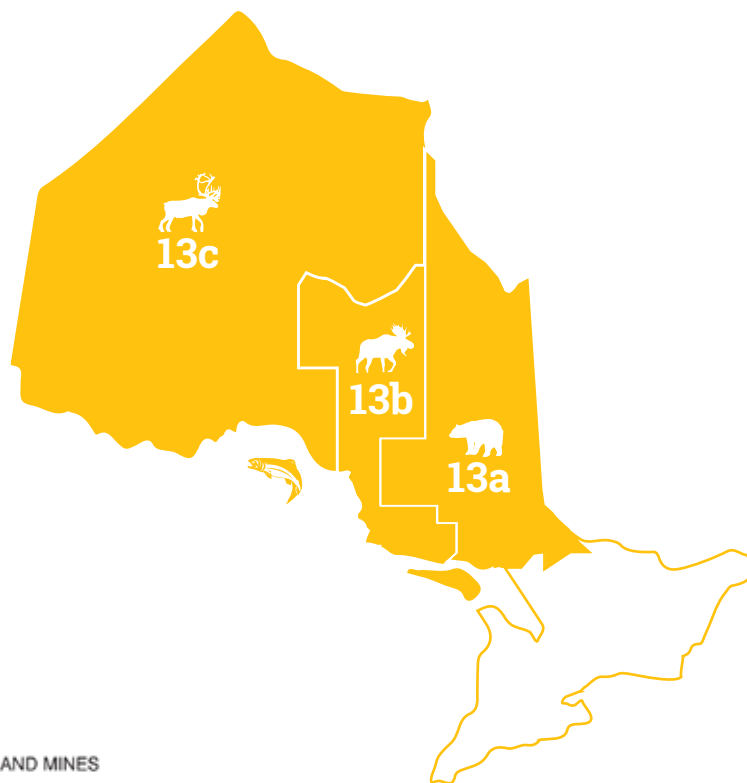
Tourism Northern Ontario is a not-for-profit organization representing the tourism industry within the geography of Region 13, Northern Ontario. The organization maintains three regional offices; the main office in Sault Ste. Marie which coordinates activities in all pillars and across the three sub-regions and is a point of contact for industry across the region and sub-region 13b, an office in Sudbury coordinating the training activities of the organization as well as serving as a point of contact for industry in sub-region 13a and an office in Thunder Bay which will coordinate product development and partnership activities across the region as well as function as a point of contact for operators in sub-region 13c.

Tourism Northern Ontario is governed by a pan-Northern Board of Directors, recognized industry leaders who collectively provide vast knowledge, experience and insight as they set the strategic direction for the organization.

The Board is comprised of nine directors with a minimum of one director representing each sub-region. Directors are appointed based on the skill sets the Board has determined, representing a variety of tourism interests across the region.

Board members are identified through a formal nomination process which concludes at TNO's Annual General Meeting. TNO strives to achieve 50% private sector tourism operator participation on the Board of Directors.

The Board is supported by representatives from the Ontario Ministry of Tourism, Culture and Sport, the Ministry of Northern Development and Mines, the Ontario Tourism Marketing Partnership Corporation, FedNor, Ontario Parks and Parks Canada.



Board of Directors:

NAME	POSITION	SECTOR
Marty Kalagian (705) 781.3329 mkalagian@hotmail.ca	President	Operator – Retired
Gerry Webber (705) 929-8120 webber.gerry@yahoo.ca	Vice President	Tourism – Retired
Heather Gropp (807) 467.4655 hgropp@kenora.ca	Secretary Treasurer	Municipality – City of Kenora
Ray Nadeau (800) 387.3331 rayn@vicinn.com	Director	Operator – Victoria Inn
George Stivrins (705) 494.8167 gstivrins@gmail.com	Director	Operator – Georgian Bay Cruise Co
Betty McGie (705) 856-2223 betty.watsons@fishthefinest.com	Director	Operator – Watson's Algoma Vacations Ltd.
Tammy Frick (705) 688.1234 tammyfrick@cinifest.com	Director	Operator – Cinefest
Dr. Rhonda Koster (807) 343-8440 rkoster@lakeheadu.ca	Director	Education – Lakehead University
Ian Wood (705) 674-4455 ian.wood@greatersudbury.ca	Director	Municipality – City of Greater Sudbury

Board of Directors:

NAME	POSITION	SECTOR
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Government Advisors:

Graham Campbell (705) 235.1665 graham.campbell@ontario.ca	Advisor	Ministry of Northern Development & Mines
Laurie Brownlee (705) 564-3175 laurie.brownlee@ontario.ca	Advisor	Ministry of Tourism, Culture & Sport
Chris Milner (705) 646-0351 chris.milner@ontario.ca	Advisor	Ontario Tourism Marketing Partnership Corporation
Nancy Rosset (705) 941-2081 nancy.rosset@canada.ca	Advisor	Innovation, Science and Economic Development – FedNor
Greg Wilson (807) 475-1480 greg.wilson2@ontario.ca	Advisor	Ontario Parks
Pamela Jalak (705) 941-6201 Pamela.Jalak@pc.gc.ca	Advisor	Parks Canada

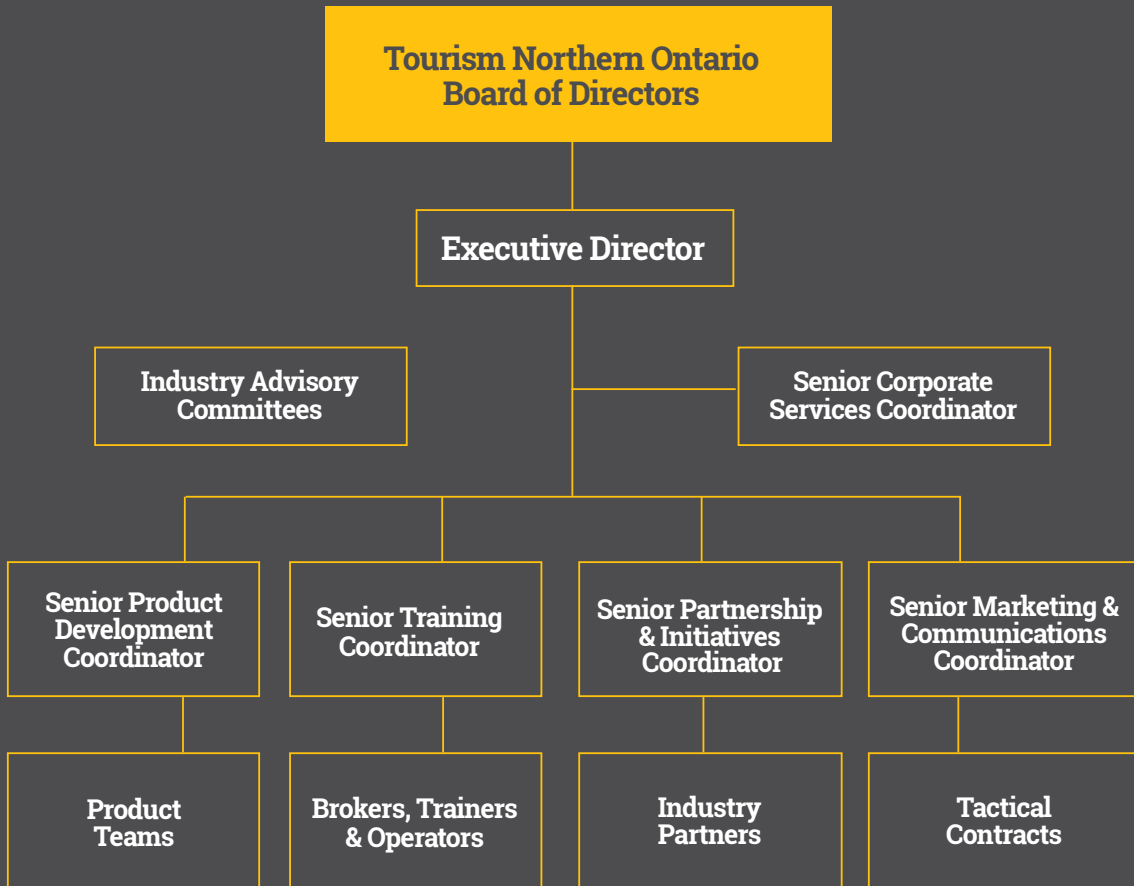
Staff

During 2016, the staff compliment at Tourism Northern Ontario consisted of six full-time and one part-time position. Going forward, staff will now lead priority pillar areas instead of having their responsibilities dictated by geography to better align with the SIP and MTCS framework.

Risk Management

The chart on **page 54** provides a summary of TNO's budget for the period April 1, 2017 through March 31, 2018. The total allocation for the region per MTCS for 2017-18 is \$4,874,164.00. However, it is expected TNO will leverage this investment by at least 50% through industry partnership as well as agreements with funding partners at both the federal and provincial levels.

Organizational Hierarchy



A Commitment to Organizational Excellence, Professionalism and Quality Program Delivery

The TNO Board of Directors through its three-year Strategic Implementation Plan, has committed to ensure the Board functions at a high level of professionalism and integrity with a zero tolerance for actual or perceived conflict of interest. Financial audits are conducted annually ensuring funds are utilized appropriately and according to the terms of the signed Transfer Payment Agreement with Her Majesty.

Staff members are expected to maintain the highest level of professionalism as they undertake their duties and deliver quality programming to the industry.

Financial Plan

Funding Allocations

TNO is funded by MTCS, receiving a core allocation consisting of a base amount allocated 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.

TNO's budget includes an allocation for Pan-Northern Ontario initiatives as well as individual allocations to each of the three sub-regions. These sub-regional allocations are calculated in the same "base plus" manner.

Tourism Northern Ontario | MTCS Budget Allocation April 1, 2017 – March 31, 2018



Governance & Administration

Salaries & Benefits	\$276,164.00
Governance	\$ 45,000.00
Overhead / Facilities	\$ 85,000.00
Finance & Administration	\$ 68,000.00
Travel	\$ 30,000.00
Industry / Relations / Stakeholder Engagement	\$ 10,000.00
Information Technology	\$ 5,000.00
Subtotal	\$519,164.00



Product Development

Salaries & Benefits	\$ 75,000.00
Research	
Product-Experience Research	\$ 37,500.00
Industry Performance Research	\$ 37,500.00
Experience Shift	
Angling & Hunting	\$ 15,000.00
Cultural & Heritage	\$ 30,000.00
Gateways & Communities	\$ 25,000.00
International	\$ 25,000.00
Nature & Adventure	\$ 15,000.00
Touring	\$ 50,000.00
Product Development Symposium	\$ 15,000.00
Wayfinding	
Wayfinding Gaps	\$ 50,000.00
#DiscoverON	\$ 25,000.00
VIC Coordination and Training	\$ 50,000.00
Subtotal	\$450,000.00



Investment Attraction

Salaries and Benefits	\$ 25,000.00
On-line IA Resource Centre	\$ 25,000.00
Subtotal	\$50,000.00



Workforce Development / Training

Salaries & Benefits	\$ 75,000.00
Delivery of TEN Programs	\$300,000.00
TEN Strategic Plan (2018-21)	\$ 50,000.00
Collaboration with Training Partners	\$ 25,000.00
Communicate Training Opportunities	\$ 50,000.00
Subtotal	\$500,000.00



Marketing

Salaries & Benefits	\$125,000.00
Strategic Implementation	
Digital Strategy	\$ 25,000.00
Performance	\$ 25,000.00
Data Segmentation	\$ 25,000.00
Packaging and On-line Sales	\$ 50,000.00
Destination Brands	
NorthernOntario.travel	
Operations	\$100,000.00
Content Acquisition	\$420,000.00
Digital Media (sub-regional)	\$175,000.00
Print Media	\$100,000.00
Media Relations	\$ 35,000.00
Digital Imagery	\$ 45,000.00
Trip Advisor	\$ 25,000.00
International Markets	\$ 50,000.00
Alignment with Provincial Brands	\$100,000.00
Priority Products & Experiences	
Angling & Hunting	
Digital Media	\$370,000.00
Consumer Touch	\$ 75,000.00
Media Relations	\$ 75,000.00
Print Media	\$ 30,000.00
Culture & Heritage	
Digital Media	\$ 90,000.00
Print	\$ 10,000.00
Gateway & Communities	
Digital Media	\$150,000.00
Consumer Touch (Trade)	\$100,000.00
Media Relations	\$ 75,000.00
Print Media	\$ 75,000.00



Marketing Cont'd.

Nature & Adventure	
Digital Media	\$ 75,000.00
Consumer Touch	\$ 30,000.00
Media Relations	\$ 30,000.00
Print	\$ 15,000.00
Touring	
Digital Media	\$ 90,000.00
Consumer Touch	\$ 40,000.00
Media Relations	\$ 20,000.00
Print	\$ 50,000.00
Industry Communication	
Industry Communications	\$ 50,000.00
Subtotal	\$2,750,000.00
Base & Proportional Funding Total	
	\$4,269,164.00



Partnership Funding

Marketing	
"Tourism Rocks" Awareness	\$ 50,000.00
Television Series	\$ 75,000.00
Where Am I?	\$ 50,000.00
Urban Gateways	\$ 37,500.00
Stay2Play	\$ 37,500.00
Angling Multi-Media	\$ 25,000.00
Product Development	
Community Wayfinding	\$ 150,000.00
Trails Wayfinding	\$ 65,000.00
Culinary Strategies	\$ 25,000.00
Strategic Tourism Planning	\$ 50,000.00
Workforce & Industry Training	
Northern Ontario Tourism Summit	\$ 15,000.00
Cultural (Group of 7) Training	\$ 25,000.00
Subtotal	\$ 605,000.00
Total	\$4,874,164.00
GRAND TOTAL	
	\$4,874,164.00

Glossary of Acronyms:

CMA	Census Metropolitan Areas
CBRE	CBRE Group (consulting firm)
DMO	Destination Marketing Organization
IA	Investment Attraction
KPI	Key Performance Indicator
MTCS	Ministry of Tourism Culture & Sport
NOHFC	Northern Ontario Heritage Fund Corporation
NOTO	Nature & Outdoor Tourism Ontario
OTMPC	Ontario Tourism Marketing Partnership Corporation
Q	Quarter
RTO	Regional Tourism Organization
SIP	Strategic Implementation Plan
TEN	Tourism Excellence North
TNO	Tourism Northern Ontario
TSRC	Travel Survey of Residents Canada
VFR	Visiting Friends & Relatives
VIC	Visitor Information Centre



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