

2018-19



DESTINATION  
**NORTHERN  
ONTARIO**

# Business Plan

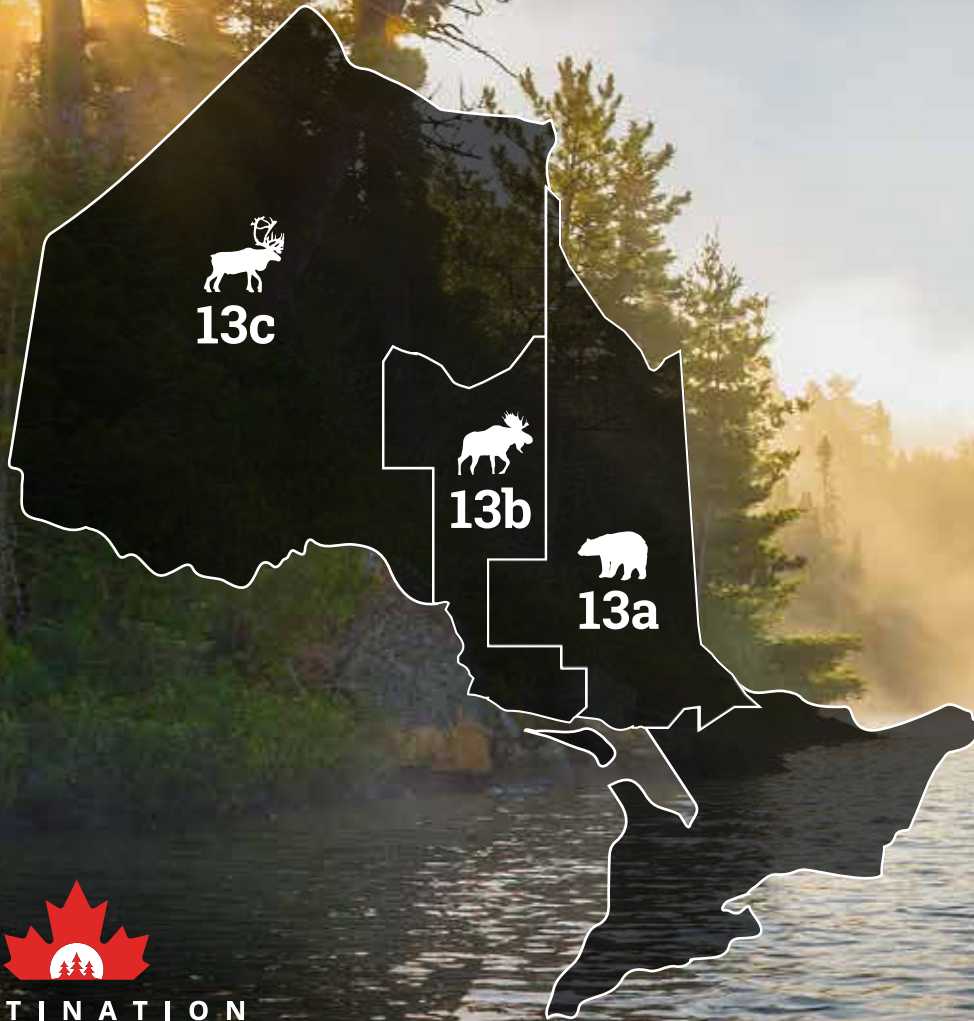


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# RTO 13



DESTINATION  
**NORTHERN  
ONTARIO**

# 2018-19 Business Plan

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## MESSAGE FROM THE PRESIDENT

As we enter our eighth year as a Regional Tourism Organization, I continue to watch Tourism Northern Ontario grow and evolve to best serve the Northern Ontario tourism industry. Change has been a constant presence in our organization, and as Chair of the Board of Directors, I am happy to report that we have been agile in learning and adapting to the ever-changing landscape of tourism product and workforce development, marketing and investment attraction in the north.

We will continue to leverage our core allocation from the Ministry of Tourism, Culture and Sport to the very best of our ability. They are a most important partner and we look forward to our work with them and with Destination Ontario in the coming year. We are also grateful for the fruitful partnerships we have fostered with our federal partners at FedNor and our provincial partners at the Northern Ontario Heritage Fund Corporation. We would be unable to achieve our great successes without these partners and they are key to our growth and prosperity.

As we continue to align ourselves with the Ministry of Tourism, Culture and Sport and Destination Ontario, we will move into the year under a new name - **Destination Northern Ontario**. The name change will be accompanied by a full public relations campaign in direct alignment with our provincial partners.

Our staff will move forward in their respective pillar areas; product development, marketing and communications, workforce development and strategic partnerships. Our capacity continues to strengthen and grow with our programs. We have added a full-time Visual Communications Designer as well as have welcomed back our Senior Product Development Coordinator. With this full complement, we are eager to roll up our sleeves and achieve even greater success!

Performance and accountability remain an integral part of our organization. The Board of Directors works closely with the Executive Director to ensure our core goals are the cornerstone of all the work we do at Tourism Northern Ontario. We will continue to exercise every opportunity to be more accountable and ensure accurate reporting in every process we undertake.

Tourism Northern Ontario is committed to championing growth while partnering with industry, government and other like-minded organizations. We will work to advance the Northern Ontario tourism sector on a provincial, national and global scale. Our ultimate goal is to create a prosperous, sustainable and vibrant tourism industry in Northern Ontario for years to come. We are excited to continue that journey into 2018-19.

Yours in tourism,

**Marty Kalagian,**  
President.



## MESSAGE FROM THE EXECUTIVE DIRECTOR

It's a great time in tourism and it is my privilege to serve Northern Ontario's tourism sector as Executive Director for Tourism Northern Ontario. My family has been part of this great industry for some 60 years now. With that experience and your support, I am grateful for the opportunity to work with you to champion the growth of our sector.

As an organization, we are committed to our vision, mission, values, sector and organizational goals. We've done well but we will do better! Yes, there are challenges to overcome and issues to work through; however, our success as a destination of choice will come from simply being the best.

Our programs and initiatives are designed to grow visitor spending and by working within the pillars of product development, investment attraction, workforce development and training, marketing and strategic partnerships. By working in these areas, we will:

- Enhance the visitor experience through well-designed tourism products that meet current and future customer demand;
- Increase investment in the tourism industry to enhance the visitor experience;
- Facilitate and support the attraction, development and retention of a tourism workforce to enhance the visitor experience; and
- Increase the awareness of Northern Ontario as a travel destination and increase conversions in our target markets.

In our role as a catalyst in building strategic alignment and promoting collaboration, we will do this work in partnership with industry.

As we move to greater alignment on a provincial and national scale as Destination Northern Ontario, our commitment to the Northern tourism industry remains strong.

Thank you to an industry that always strives to do more, our private and public-sector operators, our tourism partners with whom we work with every day including Destination Ontario, those who support our industry in an economic development or another capacity, and our funders at the Ministry of Tourism, Culture and Sport, Ministry of Northern Development and Mines and FedNor.

Your continued support ensures the continued vitality of our sector.

Sincerely,

**David MacLachlan,**  
Executive Director.

# EXECUTIVE SUMMARY

In the summer of 2017, Tourism Northern Ontario retained the firm of CBRE Limited to assist the Board of Directors to lead staff in assessing performance in its three year strategic plan and identify priorities for its 2018-19 business plan. This business plan reflects the strategic fundamentals that will guide the organization over the 2018-19 fiscal period.

From a strategic perspective, Tourism Northern Ontario will continue to play a direct role in aligning and coordinating programs across the region, as well as undertaking outreach initiatives with a “visitor first” approach to grow tourism spending in Ontario.

Furthermore, Tourism Northern Ontario will take the lead in a full rebranding process to align itself with Destination Ontario under the trade name of **Destination Northern Ontario** and launch a public relations campaign to communicate the changes to industry.



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

*Tourism 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

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." Tourism 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

## Tourism 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)

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

## Organizational Goals

Tourism Northern Ontario has identified six Organizational Goals to highlight its desired leadership role in the industry; to ensure stronger alignment with the Ontario Tourism Marketing Partnership Corporation (which recently introduced a new brand entitled “Destination Ontario”); to strengthen organizational excellence initiatives and ensure adherence to the Vision; and to meet the Ministry of Tourism Culture and Sport’s core strategic pillar requirements for funding purposes, as follows:

### Business Development Goals:

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

### Industry Leadership Goals:

- 03 Establish Tourism Northern Ontario’s role as industry leader under consolidated pillar priority areas: Marketing, Product Development, Training, Investment Attraction, and Partnership development.
- 04 Foster communication and relationship-building in the tourism sector, to ensure industry stakeholders recognize Tourism Northern Ontario’s role as a champion for growth and have access to relevant resources and programs.

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### Operational Excellence Goals:

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



Tourism Northern Ontario's Board of Directors have aligned this business plan in accordance with the Ministry of Tourism, Culture and Sport's Regional Tourism Organizations Guide which recognizes the following pillar areas:

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

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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; and**
- 04 **Define and Reduce Barriers to Economic Prosperity.**

# Organizational Goals

Photo: Algoma backcountry – Tiina Keranen

## Budget

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

The following chart provides a summary of Tourism Northern Ontario's budget for the period April 1, 2018 through March 31, 2019. The total allocation for the region per Ministry of Tourism, Culture and Sport for 2018-19 is **\$4,874,164.00**. However, it is expected Tourism Northern Ontario 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.



### Budget (April 1, 2018 to March 31, 2019)

Area of Focus	\$	%
Governance & Administration	\$ 519,164	11%
Product Development	\$ 525,000	11%
Investment Attraction	\$ 25,000	1%
Workforce Development & Training	\$ 650,000	13%
Marketing	\$ 2,550,000	52%
Partnership	\$ 605,000	12%
<b>Total Eligible Expenses</b>	<b>\$ 4,874,164</b>	<b>100%</b>
Partnership Contributions Goal (minimum \$605K)	\$ 2,400,000	50%
<b>Total</b>	<b>\$ 7,274,164</b>	<b>150%</b>



## Milestones & Success Stories

Tourism Northern Ontario was able to successfully leverage the Province's **\$605,000** investment upwards to **\$2.7 million** of partnered activity. These partnerships ranged from marketing initiatives to product development projects. Tourism Northern Ontario implemented **15** partnered initiatives working with **77** partners and leveraging **over \$4 million**.

Photo: Agawa Canyon Tour Train – Destination Ontario

One of most significant partnerships in terms of industry outreach and training continues to be our annual Northern Ontario Tourism Summit. The fourth Annual Summit was held in Thunder Bay, ON and was a great success. The event pulled in **312 delegates** in attendance; 50% of guests being tourism operators, with the rest being made up of government officials, and other industry stakeholders. The event provided operators and key stakeholders with practical training opportunities such as social media training, provincial policy updates affect tourism operators, product development symposium, francophone tourism updates, a workforce development panel and tourism trends and market information.

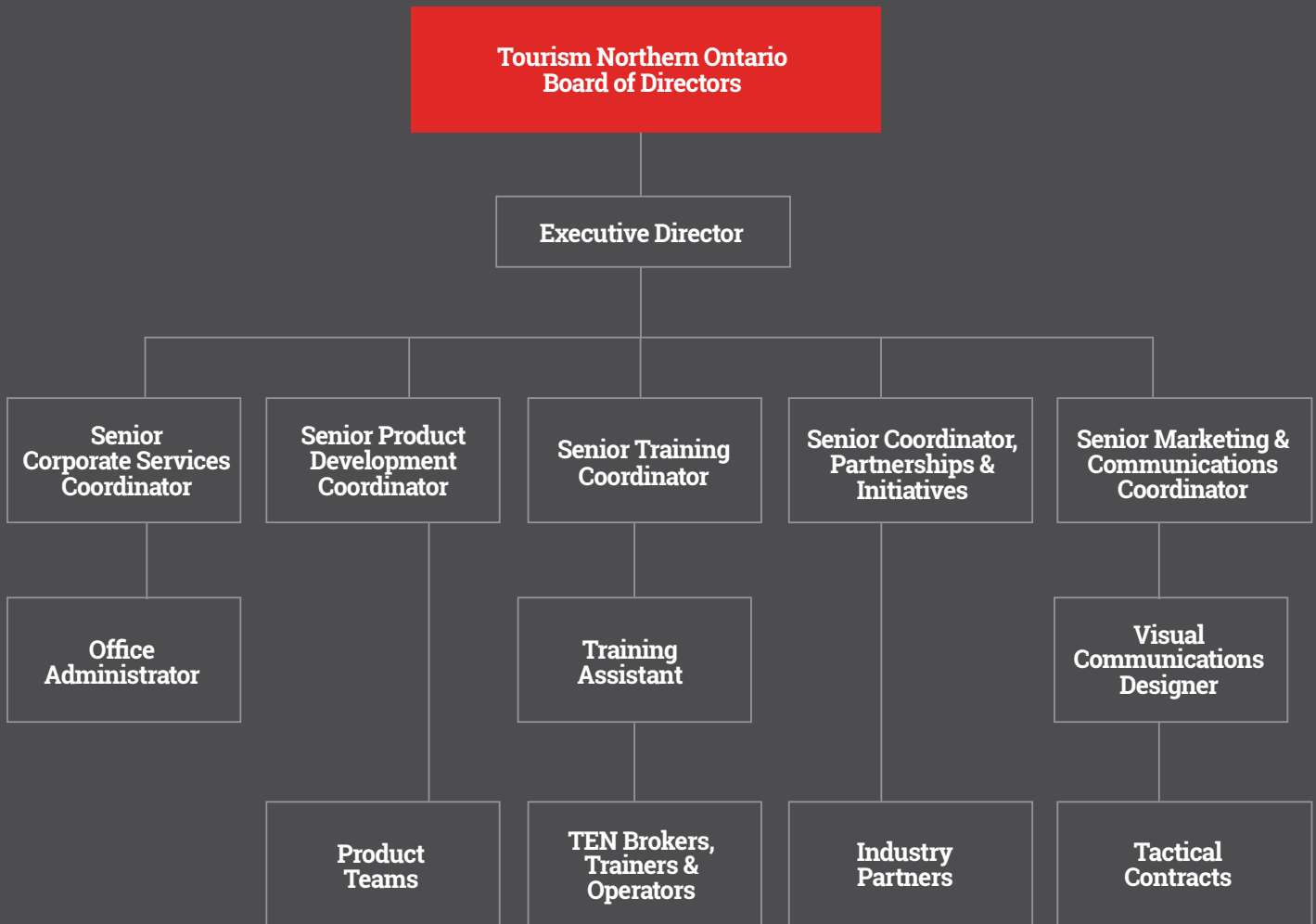
We also looked to increase awareness of tourism as an economic driver and important tax-generation industry through our Tourism Rocks! campaign. Tourism Northern Ontario worked with partners to define, plan and implement a market campaign leading to increased visibility and advancement for the tourism sector in Northern Ontario through a social media campaign, radio advertising, a media relations campaign and an innovative information package for stakeholders and other relevant audiences. The radio campaign resulted in over

**140,000** listeners; while Facebook and Twitter reached **220,000** and **180,000** users respectively. The average cost per click on these campaigns was 0.06 cents, CAD. **Twenty-five** Tourism Rocks toolkits were produced and distributed to secondary school guidance offices. The campaign garnered a great deal of positive feedback from the industry (anecdotally) and captured the attention of the President of Travel Manitoba who will use the campaign as an example for a similar initiative in their own region.

Lastly, and without doubt, one of our greatest achievements in the 2017-18 fiscal year was our work in partnership with Destination Ontario, through the Agawa Canyon Tour Train "Where Am I?" campaign. This marketing campaign was the first of its kind and a big step forward in aligning our marketing efforts with Destination Ontario. Taking a collaborative approach, this marketing campaign leveraged dollars from Tourism Northern Ontario, Destination Ontario and Tourism Sault Ste. Marie. The campaign generated **1.7 million** YouTube views, **54,650** qualified website leads and **1,320** two to three-day summer package bookings (a 10% increase year over year).



# ORGANIZATIONAL STRUCTURE



## Business & Operational Overview

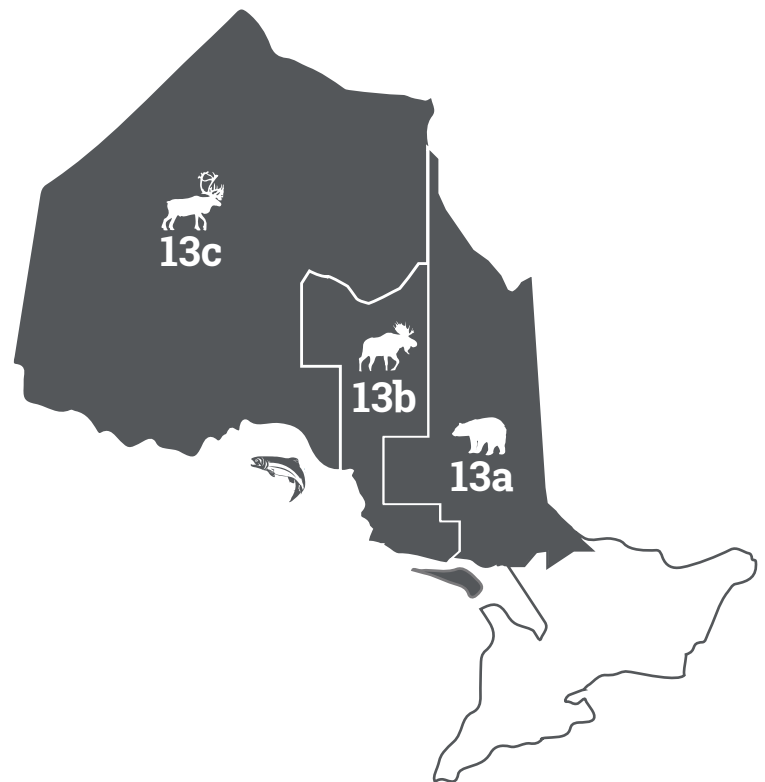
Tourism Northern Ontario is a not-for-profit organization representing the tourism industry within the geography of Region 13 - Northern Ontario. The organization maintains three regional offices. Head office (Sault Ste. Marie) coordinates activities in all pillars across three sub-regions and is a point of contact for industry across the region and sub-region 13b. A satellite office in Sudbury coordinates the training activities of the organization as well as serving as a point of contact for industry in sub-region 13a. A satellite office in Thunder Bay coordinates product development and partnership activities across the region as well as functioning as a point of contact for industry 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 (9) directors with a minimum of one director representing each sub-region. Directors are appointed based on the skillsets 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 Tourism Northern Ontario's Annual General Meeting. Tourism Northern Ontario strives to achieve 50% private sector tourism operator participation on the Board of Directors.

The board is supported with representatives from the Ontario Ministry of Tourism, Culture and Sport, Ministry of Northern Development and Mines, Ontario Tourism Marketing Partnership Corporation (Destination Ontario), FedNor, Ontario Parks and Parks Canada.



## Board of Directors:

NAME	POSITION	SECTOR
<b>Marty Kalagian</b> (705) 987.3330 mkalagian@hotmail.ca	President	Private Sector – Retired
<b>Gerry Webber</b> (705) 929.8120 webber.gerry@yahoo.ca	Vice President	Tourism – Retired
<b>Betty McGie</b> (705) 856-2223 betty.watsons@fishthefinest.com	Secretary-Treasurer	Private Sector – Watson's Algoma Vacations Ltd.
<b>Ray Nadeau</b> (800) 387.3331 rayn@vicinn.com	Director	Private Sector – Victoria Inn
<b>George Stivrins</b> (705) 746.7642 gstivrins@gmail.com	Director	Private Sector – Big Sound Marina
<b>Lori Branch</b> (807) 947-2391 fishing@seineriverlodge.com	Director	Private Sector – Branch's Seine River Lodge
<b>Tammy Frick</b> (705) 688.1234 tammyfrick@cinifest.com	Director	Not-for-profit Sector – Cinefest
<b>Dr. Rhonda Koster</b> (807) 343.8440 rkoster@lakeheadu.ca	Director	Academic – Lakehead University
<b>Ian Wood</b> (705) 674.4455 ian.wood@greatersudbury.ca	Director	Economic Development – City of Greater Sudbury

## Tourism Northern Ontario Staff

<b>David MacLachlan</b>	Executive Director
<b>Kathy Carlson</b>	Senior Coordinator, Corporate Services
<b>Stephanie Hopkin</b>	Senior Coordinator, Marketing & Communications
<b>Nicki Schiewe</b>	Senior Coordinator, Product Development
<b>Pat Forrest</b>	Senior Coordinator, Partnerships & Initiatives
<b>Karen Peacock</b>	Senior Coordinator, Industry Training (Tourism Excellence North)
<b>Karen Poirier</b>	Office Administrator, Corporate Services
<b>Tiina Keranen</b>	Visual Communications Designer, Marketing & Communications
<b>Gillian McCullough</b>	Admin Support, Industry Training (Tourism Excellence North)



## Board of Directors:

NAME	POSITION	SECTOR
<b>Government Advisors:</b>		
<b>Graham Campbell</b> (705) 235.1665 graham.campbell@ontario.ca	Advisor	Ministry of Northern Development and Mines
<b>Laurie Brownlee</b> (705) 564.3175 laurie.brownlee@ontario.ca	Advisor	Ministry of Tourism, Culture and Sport
<b>Jim Grayston</b> (705) 647.0604 jim.grayston@ontario.ca	Advisor	Destination Ontario
<b>Nancy Rosset</b> (705) 941.2081 nancy.rosset@canada.ca	Advisor	Industry Canada – FedNor
<b>Shannon Lawr</b> shannon.lawr@ontario.ca	Advisor	Ontario Parks
<b>Pamela Jalak</b> (705) 541.5619 pamela.jalak@pc.gc.ca	Advisor	Parks Canada

**An important component is the dedication of the Board towards implementation of all strategic objectives, and adherence to Board policies to ensure appropriate governance, sound advice, and oversight of the organization are being met.**

As such, the subject plan includes specific recommendations for the election of a new role on the Board of Directors under the title of Board Governance and Policy Officer. This position will be supported by the Senior Corporate Services Coordinator and Executive Director from a staff perspective.

Furthermore, the Board will work together to establish a Strategic Action Framework, to ensure continued progress towards Tourism Northern Ontario's overall goals and objectives.

## Staff

Tourism Northern Ontario has dedicated itself to taking a leadership role to guide Northern Ontario's tourism industry. As such, this business plan not only incorporates Ministry of Tourism, Culture and Sport program pillars but also incorporates goals to achieve Organizational Excellence. The following table highlights Tourism Northern Ontario's core priority pillars that allow the organization to meet Ministry of Tourism, Culture and Sport reporting requirements:

Program Pillars	Tourism Northern Ontario Operational Areas / Key Programs
Product Development	Product Development, Research
Marketing & Communications	Marketing, Communications
Workforce Development & Training	Workforce Development & Industry Training, Product Development ( <i>Quality Shift</i> ), Tourism Excellence North
Investment Attraction / Investor Relations	Investment Attraction
Partnerships	Partnership program
Corporate Services	Governance, Organizational Excellence (Administration), Outreach

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

- Senior Corporate Services Coordinator
- Senior Coordinator, Initiatives and Partnership
- Senior Product Development Coordinator
- Senior Training Coordinator
- Senior Marketing and Communications Coordinator

Tourism Northern Ontario's Executive Director manages all Senior Coordinators and is tasked with ensuring initiatives under staff leadership are completed for each pillar area. Tourism Northern Ontario has elected to take a supportive role in relation to the Investment Attraction/ Investor Relations pillar. As such, there are fewer initiatives under this pillar than the other areas and no direct leadership role assigned to them. Any responsibilities related to Investment Attraction will continue to be allocated by the Executive Director on an as-needed basis.

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

## Performance & Reporting

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

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

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



## Governance & Administrative Priorities

### Objective

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

### Priority action area

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

### Priority action area

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

### Priority action area

Ensure service contracts with outside organizations reflect Tourism Northern Ontario's Vision and Mission.

### Performance measures

- Percentage change of industry stakeholders that have partnered and collaborated in Tourism Northern Ontario activities.
- Percentage change of stakeholders satisfied with Tourism Northern Ontario activities.
- Board engagement and satisfaction with progress in accomplishing strategic initiatives.



# 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 Tourism Northern Ontario'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 totaling \$1.5 billion. Research in sub-region 13b indicates growth of approximately 7% in 2013 and 2014 in the fixed-roof accommodation sector.



## 2014 Tourism Statistics – Region 13 Total Visits & Spending

Region	Visits (millions) (2013)	Visitor Spending (billions) (2013)
Ontario	139.5 (-1.5%)	23.9 (+7.2%)
Region 13	8.2 (+1.2%)	1.5 (0%)
Region 13 as a percentage of Total Ontario	5.9% (0%)	6.25% (+0.75%)
Sub-region 13a as a percentage of Region 13	55% (+4.5%)	51% (+5.5%)
Sub-region 13b as a percentage of Region 13	20.5% (+2%)	16% (+1.2%)
Sub-region 13c as a percentage of Region 13	24.5% (-6.5%)	33% (-6.5%)

**Note:** Although 2015 RTO profiles are available, the quality of the data describing the characteristics of U.S. visitors to Ontario is particularly low and as such the ministry will not be releasing this information at the sub-provincial level.

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

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

Sub-region 13a accounted for the **largest proportion** of visits and spending in Region 13 while Sub-region 13b represented the least



### Fixed Roof Accommodation Performance Statistics (Urban)

Location	Occupancy Percentage			Average Daily Rate			Revenue Per Available Room		
	2015	2016	% Change	2015	2016	% Change	2015	2016	% Change
<b>13a</b> Northeastern Ontario	56.8%	59.7%	-2.9%	\$112.62	\$113.10	-0.4%	\$64.00	\$67.54	-5.2%
<b>13b</b> Sault Ste. Marie-Algoma	56.2%	56.0%	+0.2%	\$106.63	\$102.86	+3.7%	\$59.93	\$57.64	+2.1%
<b>13c</b> Northwest Ontario	66.6%	63.8%	+2.8%	\$113.00	\$110.04	+2.7%	\$75.25	\$70.20	+7.2%
<b>RTO13 Total</b>	59.2%	60.1%	-0.9%	\$111.70	\$110.39	+1.2%	\$66.17	\$66.31	-0.2%



### Fixed Roof Accommodation Performance Statistics (Rural)

Location	13a			13b			13c		
	2015	2016	% Change	2015	2016	% Change	2015	2016	% Change
Average Property Size (units)	28	28	0%	13	13	0%	17	17	0%
Average Operating Days	302	296	2%	n/a	n/a	n/a	168	168	0%
Average Guests / Property	6,658	7,362	-10%	1,937	2,041	-5%	2,090	1,936	8%
Average Revenue / Guest	\$84	\$78	8%	\$145	\$133	9%	\$225	\$236	-4%
Average Revenue / Property	\$559,183	\$573,808	-3%	\$281,095	\$272,139	3%	\$471,274	\$456,256	3%

13c saw the **highest average** occupancy and revenue rate increases between 2016 and 2015

13b experienced a total average daily rate increase of **3.7%** and largest increase in the lodge and outpost sector with a **13% gain** in number of visitors and **16% increase** in revenues

13a experienced dips in occupancy, daily rates and revenues between 2016 and 2015, however; experienced an **increase** in revenue and occupancy rates at rural hunting and fishing lodges



## REGION 13 SUMMARY

### + Positive Trends in the Marketplace

- 2017/18 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 U.S. visitors contributing **9.4%** of all visits and **21.8%** of all spending in the region.
- Occupancy rates were up **1.3%** year over year (2016-2017) for fixed roof accommodations in RTO13.
- **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.

**8.2**  
MILLION  
VISITS



**\$1.5**  
BILLION  
TOURISM  
RECEIPTS



**OVER  
50%**



**OF VISITORS  
TO THE NORTH  
COME TO ENJOY  
THE OUTDOORS.**

Photo: Algoma backcountry - Tiina Keranen

- Ontario residents accounted for most 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 three times as much per trip as same-day visitors (**see Table 4**).
- The largest proportions of expenditures were on Food & 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 (2014).
- **77%** of U.S. visitors came from Border States with **28%** from Minnesota and **26%** from Michigan (2014).



# Northern Ontario Tourism Research Summary

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 particular interest to the region:

- **Festivals and Events** (2014)
- **Motorcycle Touring** (2014)
- **Hunting** (2014)
- **Angling** (2015)
- **Snowmobile Touring** (2014)
- **Nature and Outdoors** (2015)
- **Visit Friends and 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 priority pillars. These strategies have guided Tourism Northern Ontario 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 Tourism Marketing Strategy
- **2017-2020** Northern Ontario Tourism 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
- **2017** Sector-Specific Tourism Plans (Angling, Auto and RV Touring, Cycling, Gateways and Destination Communities, Nature and Adventure, Snowmobiling)
- **2017** Tourist Information Strategy

Photos: Destination Ontario



## 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 visit from outside the region. To achieve these goals, tourism businesses in Northern Ontario will have to 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 24).
- 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 25).
- 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%	28%	7%
Fishing	6%	25%	6%
Hunting	1%	3%	*
Any nature-based activity <sup>1</sup>	24%	39%	31%
Any cultural/entertainment activity <sup>2</sup>	16%	17%	25%
Visiting friends and relatives (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%.

<sup>1</sup> Excludes hunting/fishing

<sup>2</sup> e.g., festivals, concerts, museums, historic sites, etc.



Photo: Wabakimi Provincial Park – Destination Ontario

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		955,000		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
<b>Canada</b>	<b>&gt;0.5%</b>	<b>95%</b>	<b>32%</b>	<b>60%</b>	<b>72%</b>	<b>88%</b>	<b>89%</b>	<b>86%</b>	<b>65%</b>	<b>100%</b>	<b>85%</b>
Ontario	20%	84%	60%	89%	58%	79%	78%	69%	54%	81%	84%
Toronto											
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%	**
<b>USA</b>	<b>40%</b>	<b>4%</b>	<b>68%</b>	<b>39%</b>	<b>24%</b>	<b>10%</b>	<b>10%</b>	<b>11%</b>	<b>31%</b>	<b>N/A</b>	<b>15%</b>
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	
			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 is 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 terrain that closely resembles 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)

	All Tourists	Used Paid Roofed Lodging
Per trip spending	\$416.00	\$821.00
Per night spending	\$119.00	\$259.00

*Special Tabulations, TSRC 2012/2013 Pooled/ITS US/OVS 2012 prepared by Research Resolutions.*



**PRODUCT  
DEVELOPMENT**

**Product Development**

Photo: Thunder Bay – Goh Iromoto, Destination Ontario



# Product Development

## Objective

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

During the current strategic planning cycle, Tourism Northern Ontario has been actively working to demonstrate leadership and strategic direction for activities related to Product Development and Research. Organizationally, this mandate falls under the realm of the Product Development Senior Coordinator to liaise with Tourism Northern Ontario's Product Teams and manage all related Research and Product Development activities.

Tourism Northern Ontario 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. According to Ontario's Tourism Action Plan (2016), priority areas include developing tourism products and experiences and improving the quality of

tourism data. Tourism Northern Ontario already has strong roots in these activity areas and will continue to fulfill related strategic action areas in the coming years.

Wayfinding initiatives will be coordinated by the Senior Partnership and Initiatives Coordinator.

In line with Ministry of Tourism, Culture and Sport's goals for the industry, the focus of Product Development will be to: implement strategic recommendations provided by the Product Teams; move forward with efforts to standardize wayfinding across Northern Ontario and develop and monitor new ways of tracking industry performance (i.e. for the overall region and within operator groups) to make evidence-based decisions for product and experience development



## Product Development

### Objective

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

### Priority Action Area

Implement staffing plan to demonstrate leadership, execute and report on initiatives within the product development pillar.

Key Activities	Q1	Q2	Q3	Q4
Product Development priorities managed by Senior Product Development Coordinator.	●	●	●	●
Wayfinding and Partnership priorities managed by Senior Partnership Coordinator.	●	●	●	●
Leverage Ministry of Tourism, Culture and Sport investment with a successful Northern Ontario Heritage Fund Corp. Intern application to assist with database and other inventories.	●	●	●	●

### Priority Action Area

Generate industry research and monitor industry performance to continually improve products and experiences and meet visitor needs.

Key Activities	Q1	Q2	Q3	Q4
Complete Lake Superior Watershed research project (Phase II).	●	●	●	●
Investigate, frame and undertake relevant priority industry research in partnership with Ministry of Tourism, Culture and Sport, Ministry of Northern Development and Mines, and Ministry of Natural Resources.	●	●	●	●





## Product Development

### Priority Action Area

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

Key Activities	Q1	Q2	Q3	Q4
Continue to update and enhance Tourism Northern Ontario Operator Database (inventory) by sub-region.	●	●	●	●
Subscribe to 12 monthly hotel/motel performance reports and one annual synopsis.	●	●	●	●
Continue annual Accommodation Performance Tracking by sub-region.	●			●

### Priority Action Area

Maintain the momentum for Northern Ontario’s “experience” shift, by developing and enhancing “best bet” products and experiences.

Key Activities	Q1	Q2	Q3	Q4
Manage existing nine product teams to review and steer sector plans. Identify new experience priorities, recruit product teams and develop three new sector plans.	●	●	●	●
Execute Product Development Symposium in conjunction with Northern Ontario Tourism Summit.	●	●	●	●
<b>Angling and Hunting</b> - Leverage Ministry of Tourism, Culture and Sport investment with Northern Ontario Heritage Fund Corp. and FedNor funding to execute Experience Fishing Program.	●	●	●	●
<b>Culture and Heritage</b> - Leverage Ministry of Tourism, Culture and Sport investment with FedNor to undertake identified Francophone tourism initiative.	●	●	●	●
<b>Gateway and Destination Community</b> – Leverage Ministry of Tourism, Culture and Sport investment with communities to develop three new festivals and events.	●	●	●	●
<b>Nature and Adventure</b> – Facilitate a meeting with trails partners to discuss the role of guides in the development of nature and adventure tourism product.	●	●	●	●
<b>Touring</b> - Leverage Ministry of Tourism, Culture and Sport investment with Northern Ontario Heritage Fund Corp. and/or FedNor to execute Lake Superior Auto/RV Touring Plan and World’s Best Snowmobile Destination Plan.	●	●	●	●





## Product Development

### Priority Action Area

Set the foundation for Wayfinding across Northern Ontario through signage, communication tools, and Travel Information Centres.

### Key Activities

	Q1	Q2	Q3	Q4
TIC training and collaboration (includes completion of one Northern Ontario information and customer service training tool, 50 service excellence training modules, extending SEP programming to 36 students).	●	●	●	●
Develop partnerships to sign 40 eligible of Northern Ontario's 54 TICs as identified in IC Strategy (13 in 13a, 8 in 13b and 19 in 13c).	●	●	●	●
Continue to increase the inventory of Northern Ontario experiences hosted on the provincial app #DiscoverON by a minimum of 75 listings per sub-region (225 total).	●	●	●	●

### Performance Measures

- Change in the number of new products and experiences and/or the number of existing products and experiences enhanced in market.
- Number of stakeholders participating in product development activities and stakeholder satisfaction with progress.
- Percentage of initiatives completed compared to target (100% of planned product development activities).



Photo: Group of Seven - Goh Iromoto, Destination Ontario

# Investment Attraction

**INVESTMENT  
ATTRACTION**

Photo: Fort William Historical Park – Goh Iromoto, Destination Ontario



# Investment Attraction

## Objective

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

With outside support on the research and implementation side, Tourism Northern Ontario has become a leader in Northern Ontario in acting as a tourism investment resource base, while encouraging entrepreneurship and tourism development. Through an existing contract in 2015/2016, Tourism Northern Ontario developed an investment attraction resource centre on the Tourism Northern Ontario website, as well as a toolkit on tourism investment opportunities in Northern Ontario for distribution to economic development officers and tourism managers across the region. As part of the same contract, Tourism Northern Ontario also surveyed local economic development stakeholders to create an inventory of investment attraction opportunities and develop a contact database. Tourism Northern Ontario also featured a workshop on public-private partnerships as part of the Northern Ontario Tourism Summit, targeting economic development professionals, and will continue to offer this type of investment-related programming at other conferences (i.e. NOMA and FONOM). Other big “wins” for Tourism Northern Ontario were the identification of tourism as a recognized industry in the Growth Plan for Northern Ontario by the Ministry of Northern Development and Mines at the 2016 Summit and recognition

of the importance of the tourism sector in the Multimodal Transportation Strategy for Northern Ontario.

Under the leadership of the Executive Director, Tourism Northern Ontario will:

- work with regional companies to offer succession planning tools for stakeholders;
- maintain and update the Investment Attraction Resource Centre in conjunction with website development on the Tourism Northern Ontario website;
- continue to maintain communication with local economic development stakeholders to add to the inventory of investment attraction opportunities
- encourage more two-way communication with funding agencies (i.e. Northern Ontario Heritage Fund Corp., FedNor, Business Development Corp., etc.); and
- coordinate grant writing for funding applications.

With Tourism Northern Ontario taking a supportive role in this pillar area, the Executive Director will work with senior coordinators as appropriate to carry out investment attraction priorities.





## Investment Attraction

### Objective

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

#### Priority Action Area

Enhance Tourism Northern Ontario's role as a resource to Northern Ontario's investment community.

#### Key Activities

	Q1	Q2	Q3	Q4
Continue to build Tourism Northern Ontario Investment Resource Centre on the Tourism Northern Ontario website.	●	●	●	●
Invite partners and advisors to discuss relevant investment-related topics at four Tourism Northern Ontario Board face-to-face meetings.	●	●	●	●
Communicate findings relative to Northern Ontario's investment to industry.	●	●	●	●

#### Priority Action Area

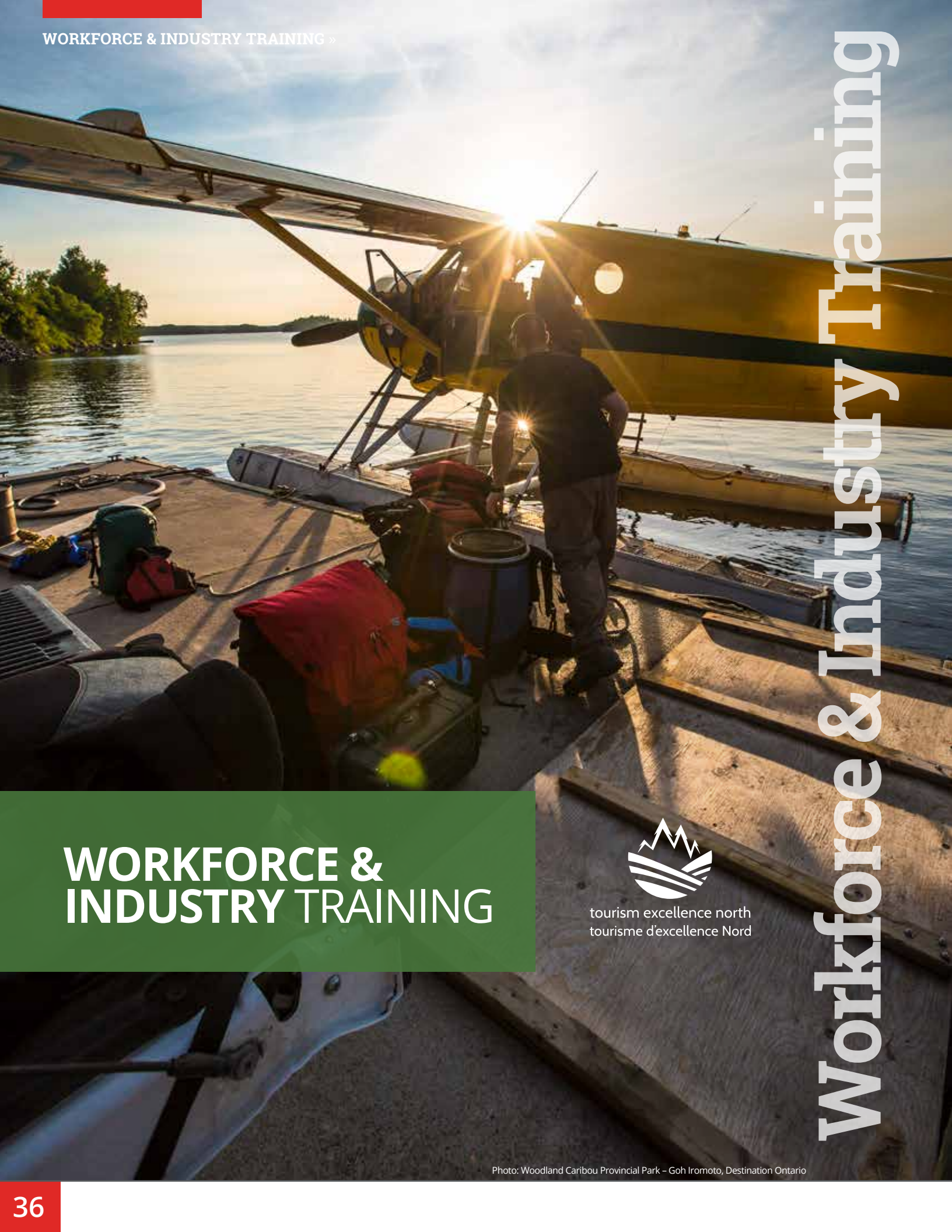
Provide support for investment into Northern Ontario products and experiences.

#### Key Activities

	Q1	Q2	Q3	Q4
Provide support to facilitate succession planning across Northern Ontario at four industry events.	●	●	●	●
Provide grant writing assistance.	●	●	●	●
Update and maintain list of tourism investment funding resources at the Provincial and Federal level.	●	●	●	●
Ensure tourism has a recognized role in economic development plans for Northern Ontario (i.e. Growth Plan for Northern Ontario and Multimodal Transportation Strategy for Northern Ontario).	●	●	●	●

#### Performance Measures

- Change in the number of outreach activities made to community and economic development organizations.
- Number of stakeholders participating in investment attraction activities and satisfaction with progress.
- Percentage of initiatives completed compared to target (100% of planned investment attraction activities).



# Workforce & Industry Training

**WORKFORCE &  
INDUSTRY TRAINING**



tourism excellence north  
tourisme d'excellence Nord

Photo: Woodland Caribou Provincial Park – Goh Iromoto, Destination Ontario



tourism excellence north  
tourisme d'excellence Nord

## Workforce & Industry Training

### Objective

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

Tourism Northern Ontario continues to take a leadership role in proactively guiding Workforce Development for 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 Tourism Northern Ontario's most notable accomplishments has been the development of the Tourism Excellence North ("TEN") program, with support from FedNor and Northern Ontario Heritage Fund Corp. The Premier of Ontario officially approached Tourism Northern Ontario to recognize its significant achievements through the Tourism Excellence North project in 2016, in hopes of expanding the program to other parts of the Province. In line with the original program plan for Tourism Excellence North (Tourism Excellence North: A Tourism Development Program for Northern Ontario, March 2015), training solutions have been put in place and a full-time Tourism Excellence North Coordinator was hired for the 2016/17 fiscal year. To consolidate Industry

Training and Workforce Development efforts undertaken by the organization with the Tourism Excellence North program, Tourism Northern Ontario will fulfill objectives of the Workforce Development and Training pillar area with a dedicated Senior Training Coordinator at the helm.

Strategic action areas for this pillar area include development and implementation of a strategic training plan, consolidating all training across the pillar areas (most notably for the TEN program); providing logistical support for training and reporting on outcomes of Tourism Excellence North; coordinating, monitoring and promoting other relevant training programs for tourism industry stakeholders in line with Tourism Northern Ontario initiatives (i.e., training for accommodation performance monitoring, wayfinding at Travel information Centers, etc.); and leveraging funding in support of Tourism Northern Ontario training-related initiatives.





## Workforce & Industry Training

### Objective

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

### Priority Action Area

Implement staffing plan to demonstrate leadership, execute and report on initiatives within the workforce development and training pillar.

Key Activities	Q1	Q2	Q3	Q4
Workforce Development and Training initiatives managed by Senior Training Coordinator	●	●	●	●
Senior Coordinator supported by Training Assistant	●	●	●	●

### Priority Action Area

Continue to develop the Tourism Excellence North program to implement a “quality shift” across Northern Ontario, building consistent quality offerings and customer experience by offering core Tourism Excellence North training programs as developed in the pilot phase of the program.

Key Activities	Q1	Q2	Q3	Q4
Deliver Fast Track personalized coaching to a minimum of 30 industry partners.	●	●	●	●
Facilitate three Best Practices Missions (Cycling, Auto/RV Touring and Snowmobile focus) to 36 participants.	●	●	●	●
Deliver three Experiential Travel Training for Operator Workshops to 45 participants.	●	●	●	●
Deliver two Moving Tourism in Your Community from Ideas to Actions Workshops to 30 participants.	●	●	●	●
Deliver on-line self-assessment and case study tools to operators and communities (200 participants).	●	●	●	●



# Workforce & Industry Training

**Priority Action Area**  
Ensure training needs associated with Product Development strategies are met through Tourism Excellence North and other Tourism Northern Ontario initiatives.

Key Activities	Q1	Q2	Q3	Q4
Leverage Ministry of Tourism, Culture and Sport funding with Northern Ontario Heritage Fund Corp. and FedNor to develop and deliver sector-specific training.	●	●	●	●
Deliver existing training for international market-readiness, fishing and hunting guides and green tourism.			●	●
Deliver sector training opportunities at Northern Ontario Tourism Summit.			●	

## Performance Measures

- Number of stakeholders reporting business/customer improvements as a result of Tourism Northern Ontario training activities.
- Number of stakeholders participating in and showing satisfaction with Tourism Northern Ontario training activities.
- Percentage of initiatives completed compared to target (100% of planned workforce development activities).



Photo: Boathouse, Kenora – Goh Iromoto, Destination Ontario



MARKETING

# Marketing



# Marketing

## Objective

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

One of the most significant shifts in the new Three-Year Strategic Plan for Tourism Northern Ontario is Tourism Northern Ontario's direction to take a more strategic leadership role in guiding Marketing and Communications for the industry. Tourism Northern Ontario's Senior Marketing and Communications Coordinator will ensure consistency in all marketing and communication efforts for Northern Ontario by centralizing and coordinating all tactical contracts and corporate communications. Other responsibilities of the senior coordinator position include: directing and implementing external public relations programs; preparing communications and publicity related to strategic initiatives, coordinating industry outreach and engagement initiatives, research and special projects; monitoring the public climate and recommending communications with the goal to enhance Tourism Northern Ontario's public image in a professional and favorable light.

The Senior Marketing and Communications Coordinator will guide the restructuring of all corporate communications to focus on distinct messaging for three audiences: government representatives, economic development professionals, and operators. By identifying these three communications streams, Tourism Northern

Ontario will ensure the most appropriate and effective programming reaches the intended partner or client.

The *Strategic Direction for Marketing Tourism in Northern Ontario 2017-2018* was prepared for Destination Ontario in close consultation with Tourism Northern Ontario in order to ensure a coordinated and consistent approach to marketing in Northern Ontario. With this document at its base, Tourism Northern Ontario has created and is currently implementing a three-year marketing action plan.

Building on the Northern Ontario Tourism Strategic Direction document, Tourism Northern Ontario's new marketing action plan focuses on implementation of pan-northern initiatives under a "visitor-first" philosophy of seamless borders for travellers; working closely with Destination Ontario early in the planning cycle for six priority product and experience areas; working with Provincial branding activities; and engaging customized tactical service agreements for multi-year contracts to ensure consistent implementation of the Strategic Direction for Marketing in Northern Ontario.



Photo: Lake of the Woods Brewery – Goh Iromoto, Destination Ontario

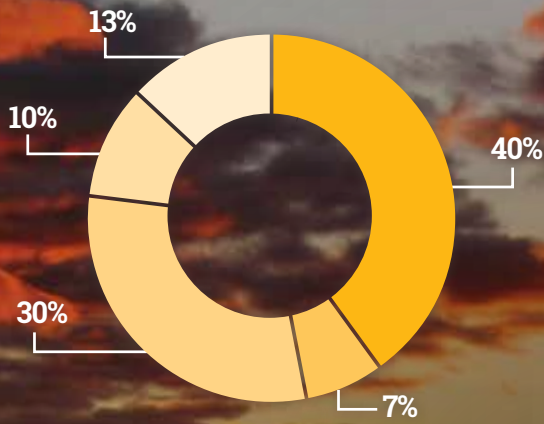
From a tactical perspective, Tourism Northern Ontario will work with partners to ensure priority product and experiences are marketed from a “visitor first” perspective, including:

- a Angling & Hunting
- c Gateway & Urban Communities
- e Touring
- b Cultural & Heritage
- d Nature & Adventure



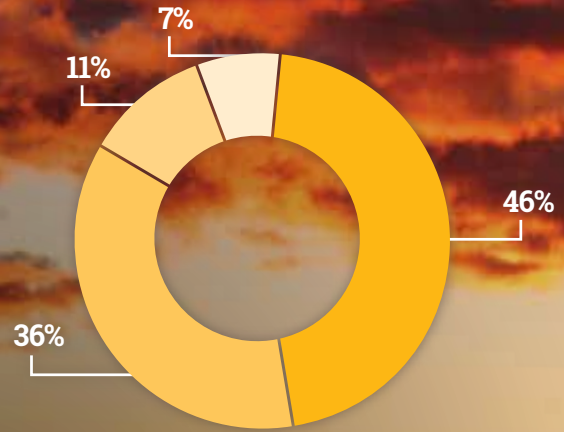
## Marketing Budget

Marketing Budget 2018-19	
Strategic Planning & Evaluation	\$ 240,000
Brand Alignment and Pan-Northern Marketing	\$ 855,000
Priority Products & Experiences	\$1,340,000
Stakeholder Communications	\$ 115,000
<b>Total Core</b>	<b>\$2,550,000</b>
Strategic Partnerships	\$ 275,000
<b>Total Combined</b>	<b>\$2,825,000</b>



**Investment by Priority Product / Experience**

- 40% Angling & Hunting
- 7% Cultural & Heritage
- 30% Gateway & Destination Communities
- 10% Nature & Adventure
- 13% Touring



**Investment by Geography**

- 46% Domestic (Ontario)
- 36% United States
- 11% International
- 7% Out of Province

**Investment by Tactic**

- 5% Print
- 64% Digital
- 14% Consumer Touch
- 17% Media Relations

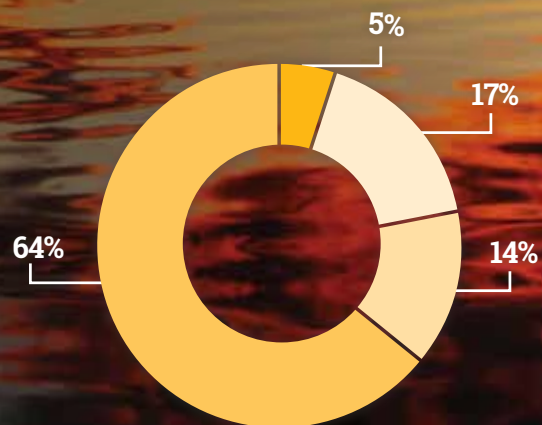


Photo: Aubrey Falls Provincial Park – Tiina Keranen





# Marketing

## Objective

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

### Priority Action Area

Implement Strategic Direction for Marketing Tourism in Northern Tourism in partnership with Destination Ontario, Destination Marketing Organizations and other industry stakeholders.

Key Activities	Q1	Q2	Q3	Q4
All marketing and communication initiatives, including the 2017-2020 Digital Strategy as well as the 3-year marketing strategy for Northern Ontario, coordinated and managed by Senior Marketing and Communications Coordinator with the help of a full-time Visual Communications Designer.	●	●	●	●
Monitor performance and reporting through third party consultant and the development of an online marketing reporting tool to track progress on all marketing activities.	●	●	●	●
Continue to provide operators with e-commerce solutions that allow easy and accessible path-to-purchase options for consumers.	●	●	●	●

### Priority Action Area

Continue to align and coordinate all pan-northern initiatives with Destination Ontario through collaborative marketing planning, asset sharing and leveraging.

Key Activities	Q1	Q2	Q3	Q4
Continue the operation of NorthernOntario.travel by enhancing the current site to accommodate further growth, new priority experiences and higher traffic rates.	●	●	●	●
Work in partnership with Destination Ontario to grow current digital assets (video and photography).	●	●	●	●
Evaluate TripAdvisor Initiative from 2017-18 and working in partnership with Destination Ontario to share best practices and develop as new program with mutual benefits.	●	●	●	●
Continue international marketing and U.S. travel trade initiatives working with Destination Ontario to participate in Rendezvous Canada, one United Kingdom sales mission, and hosting one fam tour for German operators.	●	●	●	●
Work with sub-regional leads to enhance current or create future marketing tools and assets that align with the provincial brand.	●	●	●	●
Centralize all media familiarization tours, in partnership with Destination Ontario, to ensure maximum ROI and provide equal opportunity to all sub-regional leads.	●	●	●	●





## Marketing

### Priority Action Area

Continue to align and coordinate programs/tactics common to all sub-regions and encourage collaborative marketing intra-regionally – leading with products/experiences.

Key Activities	Q1	Q2	Q3	Q4
Continue to acquire content for Northern Ontario travel through sub-regional leads directly resulting in a minimum of 880,000 visits, cost per click of .50 cents, and 232 new stories uploaded to the portal.	●	●	●	●
Work with sub-regional leads to develop and implement a multi-media tactical marketing plan that promotes angling and hunting in the region. This plan includes digital and social marketing, consumer touch, television and print marketing.	●	●	●	●
Work with sub-regional leads to develop and implement a multi-media tactical marketing plan that promotes culture and heritage in the region including digital and social marketing, consumer touch, and print marketing.	●	●	●	●
Work with sub-regional leads to develop and implement a multi-media tactical marketing plan that promotes gateways and destination communities in the region including digital and social marketing, consumer touch, and print marketing.	●	●	●	●
Work with sub-regional leads to develop and implement a multi-media tactical marketing plan that promotes nature and adventure in the region including digital and social marketing, consumer touch, television and print marketing.	●	●	●	●
Work with sub-regional leads to develop and implement a multi-media tactical marketing plan that promotes touring in the region including digital and social marketing, consumer touch and print marketing.	●	●	●	●

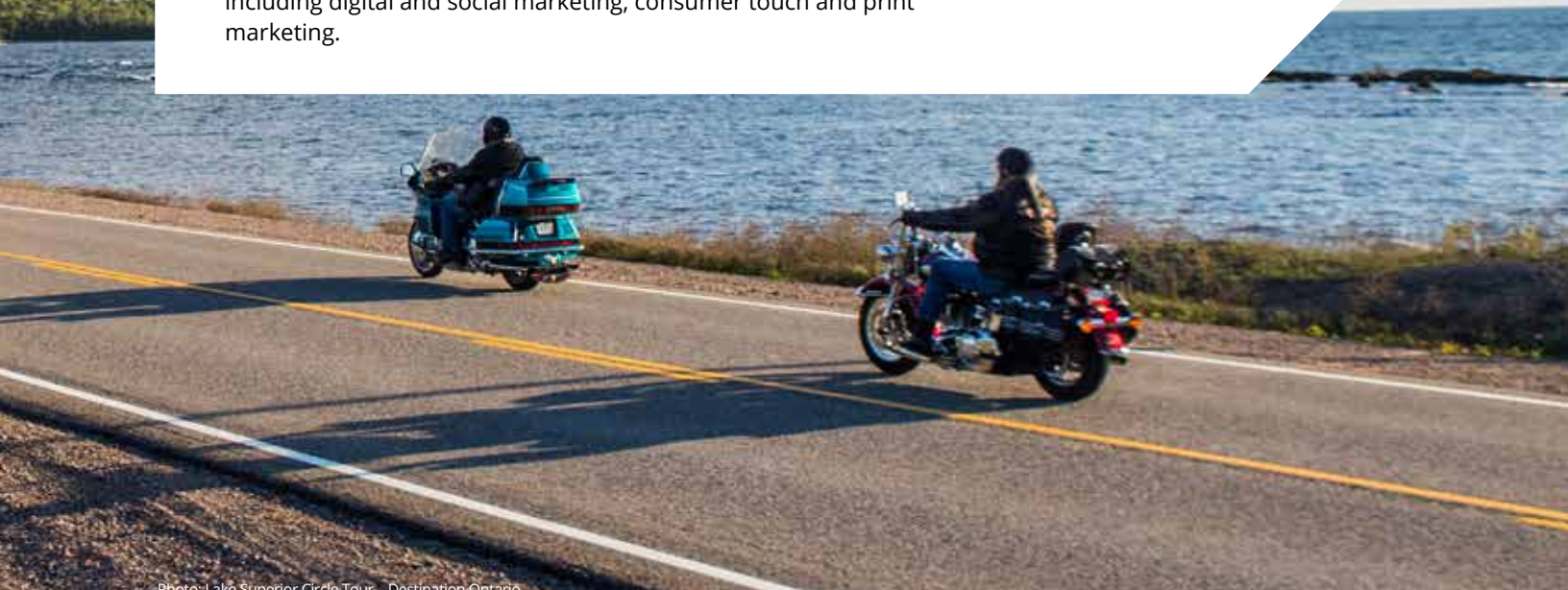


Photo: Lake Superior Circle Tour – Destination Ontario



# Marketing

## Priority Action Area

Continue to enhance awareness of Tourism Northern Ontario and its activities within existing stakeholder groups; improve communication and outreach to Northern Ontario operators, consumers and other tourism partners; and build Tourism Northern Ontario's profile for new stakeholders.

Key Activities	Q1	Q2	Q3	Q4
Implement rebranding process to align with Destination Ontario, under new trade name of Destination Northern Ontario, and implement public relations campaign for industry.	●	●		
Ensure consistent usage of organizational styles, logos, etc.	●	●	●	●
Take part in relevant industry events and outreach to network and connect stakeholders with Tourism Northern Ontario programs.				
Continue to update website data & directories regularly.	●	●	●	●
Continue to grow Northern Ontario Tourism Summit and assess satisfaction.	●	●	●	●
Continue to enhance social media and press release content.	●	●	●	●
Undertake industry awareness and satisfaction surveys.	●	●	●	●
Continue to update operator database / inventory by sub-region.	●	●	●	●
Continue to enhance Tourism Northern Ontario's Communication Plan (and assets), focusing on distinct messaging for three audiences: government representatives, economic development professionals, and operators.	●	●	●	●
Review channels for two-way communication with operators and look for increased engagement.	●	●	●	●
Improve engagement with francophone and indigenous operators and visitors to the region.	●	●	●	●
Survey operators to assess positive experiences with Tourism Northern Ontario for further outreach.			●	●

## Performance Measures

- Change in output measures including leveraged marketing from partners and earned media, web analytics and on-line bookings.
- Change in number of stakeholders participating and satisfaction with marketing activities.
- Percentage of initiatives completed compared to target (100% of planned marketing activities).



# Partnerships

PARTNERSHIPS

Photo: Woodland Caribou Provincial Park – Goh Iromoto, Destination Ontario



# Partnerships

## Objective

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

Although the Partnership Program is a common source of funding amongst RTOs, Tourism Northern Ontario has well exceeded Ministry of Tourism, Culture and Sport's matching contribution of \$605,000. In 2015/16, the value of Tourism Northern Ontario 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 Tourism Northern Ontario sponsored initiatives and the financial value attached to these partnerships, Tourism Northern Ontario requires a dedicated Senior Partnership and Initiatives 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 Tourism Northern Ontario'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 Tourism Northern Ontario pillar objectives, and targeting an increase in leveraged funding of 5% per annum, are important components of ensuring the continued success of the Partnership Program.

The following chart identifies both the strategic action areas to guide initiatives over the next year.





## Partnerships

### Objective

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

#### 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 Tourism Northern Ontario.

#### Key Activities

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

Q1	Q2	Q3	Q4
●	●	●	●
●	●	●	●

Marketing partnered initiatives utilizing the Ministry of Tourism, Culture and Sport partnership allocation will be managed by the Senior Marketing and Communications Coordinator (salary budgeted under Marketing pillar).

#### Priority Action Area

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

#### Key Activities

Review previous fiscal's initiative, identify partners and develop a multi-media campaign utilizing social and digital, print, television and radio media for this fiscal period and monitor progress and performance.

Q1	Q2	Q3	Q4
●	●	●	●

#### Priority Action Area

In partnership with Destination Ontario, Northern Ontario Heritage Fund Corp., DMOs and industry operators work with Lindner Media to develop 13 episodes for season two of "The Ontario Experience" television show for U.S. networks.

#### Key Activities

Review previous fiscal's initiative, identify partners and develop a plan to film 13 episodes.

Q1	Q2	Q3	Q4
●			●
●	●	●	●
●	●	●	●

Each episode to be aired on U.S. networks a minimum of three times beginning January 2019.

Develop and implement a supporting multi-media campaign to drive ratings for the show with a heavy emphasis on social and other digital media.





## Partnerships

### Priority Action Area

In partnership with Destination Ontario, Destination Marketing Organizations and identified tourism industry partners develop marketing campaigns aligned with “Where Am I?”.

Key Activities	Q1	Q2	Q3	Q4
Review previous fiscal's initiative(s) to plan for initiatives for 2018-19.	●			●
Working with CTV, Destination Ontario, Destination Marketing Organizations and 28 industry operators, align the previous “Stay2Play” campaign with “Where Am I?” to develop and implement summer and winter campaigns to promote travel within Northern Ontario.	●	●	●	●
Working with Porter Airlines, Destination Ontario, and Destination Marketing Organizations, to develop a spring, summer and fall marketing campaign promoting Northern Ontario tourism experiences and gateway communities.	●	●	●	●
Working with Destination Ontario and Destination Marketing Organizations, to develop an annual marketing campaign promoting Northern Ontario's tourism experiences and visits to <a href="http://northernontario.travel">northernontario.travel</a> .	●	●	●	●

### Priority Action Area

In partnership with FedNor and identified community partners develop and implement community tourism wayfinding strategies utilizing Tourism Northern Ontario's wayfinding tool kit. Year two of FedNor funding.

Key Activities	Q1	Q2	Q3	Q4
Review previous year's initiative, identify community partners, develop community plans, design, manufacture and install signs, and monitor progress and performance. Potential partners identified: Timmins, North Bay, Greenstone, Kenora and Nipigon.	●	●	●	●

### Priority Action Area

Working with Northern Ontario trail partners develop and implement tourism trail wayfinding strategies that include print, digital and signs to improve wayfinding and support connections to tourism experiences and support services.

Key Activities	Q1	Q2	Q3	Q4
Review previous year's initiative, identify trail partners, develop trail wayfinding plans, implement tactical recommendations and monitor progress. Potential partners identified: Voyageur Trail, Lake Superior Watershed Conservancy, Path of the Paddle, Thunder Bay Trails, and Cup'n Saucer Trail.	●	●	●	●





## Partnerships

### Priority Action Area

Working with identified tourism partners from the not-for-profit community, develop strategic plans that support Tourism Northern Ontario's priority sectors and/or pillars.

#### Key Activities

Review previous year's initiative, identify industry not-for-profit tourism partners, undertake the development of a strategic plan per partner. Potential partners identified: Nature and Outdoor Tourism Ontario, Algoma Fall Festival and Temiskaming Shores Kiwanis.

Q1	Q2	Q3	Q4
●	●	●	●

### Priority Action Area

Identify, collaborate and develop partnerships to deliver industry training activities at the 2018 Northern Ontario Tourism Summit that support Tourism Northern Ontario's training priorities.

#### Key Activities

Review previous fiscal's activity, identify training gaps and potential partners, and deliver training in the fall of 2018

Q1	Q2	Q3	Q4
●	●	●	●

### Performance Measures

- Number of stakeholders participating in and their satisfaction with partnership initiatives.
- Percentage of activities completed compared to target (100% of planned partnership activities).
- Change in and value of partnership projects (increase in total \$ leveraged) and diversity of partnership initiatives by priority pillar.



## RISK MANAGEMENT

# Risk

The Tourism Northern Ontario Board of Directors, through its three-year strategic implementation plan, have committed to ensuring 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 are expected to maintain the highest level of professionalism as they undertake their duties and deliver quality programming to the industry.

The major risk in terms of carrying out this business plan centre around capacity in two areas, Tourism Northern Ontario staff capacity and the capacity of partners contracted through procured service agreements.

It is the duty of the Executive Director, in consultation with the Tourism Northern Ontario Board, to monitor, plan and ensure the staff complement is adequate to carry out the initiatives. In order to carry out the initiatives, where warranted, Tourism Northern Ontario may consider the option of contracting outside firms for specific tasks through a fair and transparent procurement process.



# Management

Photo: Sylvan Valley, Algoma – Tiina Keranen

Where provisions for delivering on this plan are through service agreements, the Tourism Northern Ontario Board will support the Executive Director in terms of ongoing monitoring of progress, review of performance and remedial action as outlined in this business plan including annual audits of activities undertaken through service agreements.

Finally, the availability of financial resources to carry out the initiative plays a significant role. Over the years, payments have been delayed due to factors beyond the control of Tourism Northern Ontario and the Ministry of Tourism, Culture and Sport. It is imperative that Tourism Northern Ontario meets

reporting deadlines that are milestones in the payment schedule. However, for instances when circumstances intervene, Tourism Northern Ontario has negotiated a substantial line of credit with its financial institution that allows it to bridge these funding gaps.



**FINANCIAL  
PLAN**

**Financial Plan**

# Financial Plan

## Funding Allocations

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

Tourism Northern Ontario'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 & Ministry of Tourism, Culture and Sport Budget Allocation

April 1, 2018 to March 31, 2019



#### 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
<b>Subtotal</b>	<b>\$519,164.00</b>





## Product Development

<b>Salaries &amp; Benefits</b>	\$ 150,000.00
	<b>\$ 150,000.00</b>
<b>Research</b>	
Industry Experience Research	\$ 50,000.00
Industry Performance Research	\$ 25,000.00
	<b>\$ 75,000.00</b>
<b>Experience Shift</b>	
Product Team Management	\$ 5,000.00
Product Development Symposium	\$ 10,000.00
Angling & Hunting	\$ 25,000.00
Culture & Heritage	\$ 25,000.00
Gateway Destination Communities	\$ 50,000.00
Nature & Adventure	\$ 5,000.00
Touring	\$ 50,000.00
	<b>\$ 170,000.00</b>
<b>Wayfinding</b>	
TIC Training & Coordination	\$ 80,000.00
TIC Signage	\$ 25,000.00
DiscoverON	\$ 25,000.00
	<b>\$ 130,000.00</b>
<b>Subtotal</b>	<b>\$ 525,000.00</b>



## Investment Attraction

Facilitate IA Consultation	\$ 5,000.00
Succession Matching	\$ 20,000.00
	<b>\$ 25,000.00</b>
<b>Subtotal</b>	<b>\$ 25,000.00</b>



## Workforce Development & Training

Salaries & Benefits	\$ 150,000.00
Experience Shift	\$ 400,000.00
Sector Training	\$ 100,000.00
<b>Subtotal</b>	<b>\$ 650,000.00</b>



## Marketing

### Implementation

Salaries & Benefits	\$ 130,000.00
Performance	\$ 50,000.00
eCommerce	\$ 60,000.00
	<b>\$ 240,000.00</b>

### Pan-Northern Activities

Website Operation	\$ 100,000.00
Digital Asset Acquisition	\$ 25,000.00
TripAdvisor	\$ 25,000.00
International Marketing	\$ 50,000.00
Provincial Brand Alignment	\$ 210,000.00
Media Relations	\$ 70,000.00
	<b>\$ 480,000.00</b>

### Sub-Regional Activities

Website Content Acquisition	\$ 375,000.00
Angling & Hunting	\$ 545,000.00
Culture & Heritage	\$ 90,000.00
Gateway Destination Communities	\$ 400,000.00
Nature & Adventure	\$ 135,000.00
Touring	\$ 170,000.00
	<b>\$1,715,000.00</b>

### Communications

Stakeholder Engagement	\$ 115,000.00
	<b>\$ 115,000.00</b>

**Subtotal \$ 2,550,000.00**



## Partnership

### Marketing

Tourism Awareness	\$ 25,000.00
Ontario Experience TV	\$ 85,000.00
Where Am I?	\$ 185,000.00
	<b>\$ 295,000.00</b>

### Product Development

Community Wayfinding	\$ 150,000.00
Trails Wayfinding	\$ 50,000.00
Strategic Research & Planning	\$ 100,000.00
	<b>\$ 300,000.00</b>

### Workforce & Industry Training

Northern Ontario Tourism Summit	\$ 10,000.00
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**Subtotal \$ 605,000.00**

**GRAND TOTAL \$4,874,164.00**





## GLOSSARY OF ACRONYMS:

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



DESTINATION  
**NORTHERN  
ONTARIO**

Photo: Old Woman Bay, Lake Superior – Destination Ontario





DESTINATION  
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