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# 2016-2017

## BUSINESS PLAN

Working in partnership to build a thriving Northern Ontario tourism industry and a strong Northern Ontario economy.



# BIG VISTAS

Northeastern  
Ontario  
CANADA

Sweeping scenery to take your breath away.  
Turn outdoor and nature dreams into  
adventure reality.



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NORTHWEST ONTARIO

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**NORTHWEST ONTARIO**  
WHAT ARE YOU DOING THIS WEEKEND?

**CROSS-COUNTRY SKIING**  
NORTHWEST ONTARIO

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Explore unforgettable Northwest Ontario - a whole new world of adventure is waiting. So what are you waiting for? Escape the everyday and give it a go - one weekend won't be enough.  
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## MESSAGE FROM THE PRESIDENT



2016/17 marks our fifth year of operations as Regional Tourism Organization 13; now known as Tourism Northern Ontario. After several years of careful planning, we are beginning to see the fruits of our labour, and ultimately, our development as a dynamic and multi-faceted tourism organization.

The 2014/15 year ended with a tremendous amount of success and change for the organization. Research that was undertaken in 2013/14 guided strategies around marketing, product development, workforce and industry training and investment attraction including a wayfinding strategy for the region. We continued to leverage dollars through partnership initiatives, finding success in over 15 partnerships this year. Industry outreach sessions provided direct communication and awareness of our efforts to communities across the North.

Perhaps one of the most significant changes, the core staff at Tourism Northern Ontario more than doubled in 2015 allowing for greater capacity to move our strategic plan forward. Directly influenced by a multitude of industry research, our strategic plan guides us in the direction we need to go in order to best serve our Northern Ontario tourism industry. Now, with the addition of key staff members and a newly structured Board of Directors, we will continue to diligently move this plan forward as actionable projects and initiatives.

We are on the forefront of a significant product development and training initiative, Tourism Excellence North (TEN), and we are happy to announce we are moving forward with this project. As of November 2015, a dedicated coordinator has been hired to implement the new program across the North. This initiative will help to improve our tourism product in the North, and provide training for operators in order to help their businesses grow.

Tourism Excellence North is just one of many exciting projects on the horizon for Tourism Northern Ontario. I am looking forward to another prosperous and exciting year for our organization and to further developing our regional tourism industry.

I would like to thank all the members of the 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



As we move into our fifth year of operation, Tourism Northern Ontario (TNO) continues to create a Culture of Excellence encouraging exceptional product and service among tourism operators in the North. With this vision in mind, we have developed a Strategic Implementation Plan that ensures our seven areas of focus are geared to promoting positive visitor experience through our Quality and Cultural Shifts.

In order to achieve this vision, we have spearheaded several key initiatives that will help industry stakeholders and have a positive impact on tourism. Tourism Excellence North (TEN) is a program developed specifically to help operators, communities and destinations improve the quality of their product, while increasing their capacity to enhance visitor experience. In the fall of 2015, TNO hired a TEN Coordinator to help lead this project. The program is expected to roll out in the late spring of 2016.

Additionally, TNO has developed seven product teams comprised of industry experts relevant to specific tourism sectors in the North. These product teams are meant to work towards specific tangible goals in order to help progression of their respective sectors including; snowmobiling, urban communities and gateways, cultural (specifically Group of Seven), angling, nature and outdoors, cycling, RV and automobile touring, and international markets.

TNO also remains focused on several other priority pillars including workforce development and training and investment attraction. A new training calendar has been made available on the TNO website and staff works to populate it with training opportunities relevant to the industry. This calendar is meant to be a "one-stop-shop" for our operators in relation to anything training-specific. Investment attraction initiatives are still in their infancy stage and with increased capacity at TNO we hope to see these initiatives continue to develop throughout the 2016-17 fiscal year. Plans include new investment attraction partnerships, database development and labour workforce profiling in the North.

TNO continues to support the three sub-regions through implementation of our Northern Ontario tourism marketing plan.

With the continued support of and partnerships with the Ministry of Tourism, Culture and Sport (MTSC), and the Ontario Tourism Marketing Partnership Corporation (OTMPC), TNO looks forward to further developing tourism in the North. There is an ever-increasing pressure to develop initiatives that will increase the quality of our product, while remaining a destination of choice for tourists from across the globe. We see our role as part facilitator, partner and catalyst to ensure the vision of MTSC in the North is fulfilled.

David MacLachlan,  
Executive Director.

## EXECUTIVE SUMMARY

The 2015/2016 fiscal year represented Year 1 of Tourism Northern Ontario's (TNO) Strategic Implementation Plan (SIP). During this transition year, TNO made great progress towards meeting the primary goals set forth in the SIP.

TNO developed new contracts with the former marketing leads (now sub-regional leads) and addressed conflict of interest issues, which led to a complete restructuring of the Board of Directors. Year 1 also involved a shift towards decreasing both budget and resources currently allocated to Marketing, in order to focus more predominantly on Product Development. Within that pillar area, TNO has actively organized 9 Product Teams with the help of industry stakeholders, which are already moving forward with a variety of well-development projects; is moving forward with the Tourism Excellence North program in partnership with FedNor and RTO 12; and has implemented several pilot programs in conjunction with implementing the Wayfinding Strategy.

TNO is also making great strides in Research, focusing on both product market research and tracking business operator performance, starting with Algoma's accommodation market. Within the Workforce Development pillar, a substantial amount of outreach has led to stronger relationships with Workforce Planning Boards across Northern Ontario, and the TNO website now includes a training calendar, based on a database of regional training opportunities. Year 1 also focused on rolling out the strategy for Tourism Investment Attraction in Northern Ontario, implementing a new TNO Communications Plan; implementing an Organizational Capacity Assessment to better understand available resources; and building the Northern Ontario Tourism Summit as a key industry event and educational forum. All of these activities have been bolstered by a stronger, more skills-focused Board of Directors, and a larger staff complement.

With the transition period over, and both financial and

human resources secured, TNO now has the opportunity to gain true momentum in achieving its goals and take a leadership role in Ontario's tourism sector, as outlined in the Business Plan for 2016/2017. Key factors in TNO's success will be its ability to build on existing partnerships, use the knowledge gained in the transition year to make informed decisions (i.e. develop new contracts), and leverage financial resources wherever possible.

In accordance with the terms of our agreement with MTCS, we are pleased to submit the Business Plan for Tourism Northern Ontario (TNO) for the 2016/2017 fiscal year, which corresponds to Year 2 of TNO's Strategic Implementation Plan. This document details the recommended objectives, actions and specific tasks that TNO will need to undertake in order to achieve the strategic goals of its Strategic Implementation Plan. Each section of this plan details specific action items to be undertaken by TNO and its partners within each of the mandated priority pillar areas. The report also includes a detailed budget by pillar area.

### Vision

A strong and empowered Northern Ontario tourism industry.

### Mission Statement

In partnership with industry, Tourism Northern Ontario seeks to increase tourism, build tourism capacity and advocate on behalf of Northern Ontario tourism.

### 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 foun-

ation of strong governance and management leadership." Tourism Northern Ontario's (TNO) Board also recognizes the following values as important aspects of the strategic plan:

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

### Strategic Goals

1. Achieve an experience, quality and culture shift at both the organization and industry level, wherein product development sets the momentum for marketing, through strong partnerships.
2. Work with partners to close the gap between skills training, development resources and sector awareness.
3. Encourage and support tourism investment attraction opportunities in Northern Ontario.
4. Build a solid understanding of available human and financial capacity to leverage in order to achieve TNO's goals.
5. Align core budget from MTCS and resources to ensure TNO's goals are met and sustained, while leveraging additional funding through strategic partnerships.
6. Maintain organizational excellence.

The Board of Directors have recognized nine areas of focus for Tourism Northern Ontario,

1. Research
2. Product Development
3. Marketing

4. Workforce and Industry Training
5. Investment Attraction
6. Partnership
7. Governance
8. Organizational Excellence
9. Communication and Outreach

Which can be translated into six pillar areas recognized by the Ministry of Tourism, Culture and Sport,

1. Governance and Administration
2. Product Development (including Research)
3. Marketing
4. Workforce and Industry Training
5. Investment Attraction
6. Partnership.

This business plan provides details with respect to each of the six areas of focus.



TNO receives a core funding allocation through the Ontario 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 matches partner contributions from non-provincial government sources.

The following chart provides a summary of TNO's budget for the period April 1, 2016 through March 31, 2017. The total allocation for the region per MTCS for 2016-17 is \$5,128,000.00. 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.

## Industry Collaboration & Leveraging the MTCS Investment

**Budget** (April 1, 2016 to March 31, 2017)

Area of Focus	\$
Governance, Administration, Communication and Outreach	\$645,164
Product Development (including Research)	\$550,000
Marketing	\$2,949,000
Workforce Development	\$75,000
Investment Attraction	\$50,000
Partnership	\$605,000
Total (MTCS Allocation)	\$4,874,174
Partnership Contributions (minimum)	\$605,000
<b>Total</b>	<b>\$5,479,164</b>

TNO continues to identify areas where it can build industry collaboration and leverage the core MTCS investment. The partnership program is a continued success leveraging a \$605,000 MTCS investment by \$627,500 in eligible partnership contributions. When combined with other financial and in-kind contributions TNO has successfully implemented \$3.4million of partnered initiatives that align with its strategic and business plan. TNO also leverages its core MTCS investment through funding agreements with industry partners, the OTMPC and funders like FedNor and the NOHFC.

In terms of industry engagement TNO is effectively engaging a minimum of 150 industry stakeholders on a regular basis through its Board of Directors, advisory committees, product teams and working groups.

## TNO Achievements The 2015 Northern Ontario Tourism Summit

The second annual Northern Ontario Tourism Summit was held on November 16-18, 2015 in Sault Ste. Marie. The summit was co-hosted by Tourism Northern Ontario and Nature and Outdoor Tourism Ontario (NOTO) with the event agenda focused on product and industry capacity to grow including the first Northern Ontario Tourism Product Development Symposium.

The event sold out at 327 delegates. The planning committee consisted of 12 partners who were able to leverage registration fees with sponsored and funder contributions to produce a budget of over \$125,000 for the event.

## Northern Ontario Tourism Product Development Strategy Quality Shift

Tourism Excellence North (TEN) is a new training and development program developed in partnership with Explorer's Edge to help promote product development and workforce training in the North. The program is based on a successful Atlantic Canada model and addresses Quality Shift recommendations in the Northern Ontario Tourism Product Development Strategy. A project coordinator was hired in the fall of 2015 who will implement the Tourism Excellence North business plan.

Self-Assessment Tools have been completed and translated into both official languages, and are available online to operators and communities. Over the next fiscal year Tourism Excellence North will see the launch of other on-line self-learning tools through a network of "brokers" as well as group and learning through training sessions, webinars, best practices missions and mentored learning facilitated by one on one training specialists.

## Experience Shift

TNO is guided by the Northern Ontario Tourism Product Development Strategy to focus on product development in three "shifts"; experience, quality and culture. In terms of the Experience Shift we are working in terms of primary, secondary and tertiary experiences with product priorities determined by visitation, spend, and return on investment in terms of potential growth or consumer demand. The work undertaken by our first priority product teams will allow TNO to examine the product offerings of the

region in greater depth.

TNO has mobilized nine Product Teams comprising of Industry professionals who have volunteered their time to work with TNO to identify priorities for development in the following areas; Nature and Adventure; Angling, Auto and RV Touring; International Markets; Gateway Communities; Wayfinding; Culture - Group of Seven; and Snowmobiling and Cycling.

These teams will review strategy recommendations, offer insight and set priorities and an action plan for each area whereby TNO hopes to leverage our investments to develop programs to grow each experience or sector.

## The Lake Huron Waterfront Trail

A recent study by MMM Group for TNO recommended a 370 km cycling route along the North Shore from Sault Ste. Marie to Sudbury (18 communities, 3 First Nations). However, who would lead this project, who would pay for it and who would manage it on an ongoing basis? These types of issues are usually the death knell of many well intentioned feasibility studies. TNO stepped up to take advantage of the growing \$391 million cycling market. A regionally represented Working Group was established and TNO took the lead forming partnerships with Waterfront Regeneration Trust (a non-profit well experienced in managing cycling trails), Trans Canada Trail (who are developing a national trail from BC to Newfoundland by 2017), MTO and then accessed funding from Ontario Trillium Foundation & TD Bank Group. The route is part of the provincial Great Lakes Waterfront Trail cycling route & national TCT trail, and brings you back to nature & history along back-country roads & trails, old homesteads, Mennonite farms, Canadian Shield (4.2 billion years old), the Great Lakes & North Channel with breath-taking views & vistas. There are plenty of sites to see & overnight opportunities from campsites to waterfront cottages to hotels. Week-end cyclists can drive-and-ride to one of the

many trailhead communities and spend a day or two cycling the region & enjoying the amenities. Serious cyclists can ride the linear route.

This is a huge success for TNO demonstrating new product development, new partnerships and new investment (expecting to realize estimated \$5.5 million in infrastructure investment) in one great project.

## Northern Ontario Tourism Wayfinding Strategy

TNO has completed signage pilots in Thunder Bay and Wawa as outlined in the Northern Ontario Wayfinding Strategy. In addition to Thunder Bay and Wawa, TNO will support other Northern Ontario communities develop and implement wayfinding programs and is poised to undertake its most ambitious wayfinding project yet in the next three years, sourcing funders to undertake a massive rollout of a Northern Ontario tourism wayfinding program, targeting communities that need assistance to develop or adapt their wayfinding plans or to fabricate and install tourism wayfinding signage. The next step will be to share the planning documents with other communities across the north.

## REGIONAL OVERVIEW AND 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 four businesses are tourism related. In 2012 there were 8.1 million visits with receipts totalling \$1.5 billion. Research in 13B indicates growth of approximately 7% in 2013 and 2014 in the fixed-roof accommodation sector.

### 2012 Tourism Statistics – Region 13

#### Total Visits and Spending

Region	Visits (millions) (vs 2011)	Visitor Spending (\$ billions) (vs 2011)
Ontario	141.7 (2.0%)	22.3 (6.2%)
Region 13	8.1 (7.0%)	1.5 (11.1%)
Region 13 proportion of Total Ontario	5.8%	6.9%
Region 13a proportion of Region 13	50.6%	45.5%
Region 13b proportion of Region 13	18.4%	14.8%
Region 13c proportion of Region 13	31.0%	39.6%

- In 2012, there were 8.1 million visits to Region 13, representing 5.7% of total visits to Ontario
- Visitors to Region 13 spent \$1.5 billion, accounting for 6.9% of total visitor spending in Ontario
- Region 13a accounted for the largest proportion of visits and spending in Region 13 while Region 13b represented the least.

## Algoma Country Fixed Roof Accommodation Performance Statistics 2013/14

### Algoma Country Total Fixed Roof Accommodation Market Performance (not including Sault Ste. Marie)

	2013	2014	% Chg
Total Units	2,735	2,764	1%
Total Guests	367,300	408,900	11%
Revenue per Guest	\$131	\$126	-3%
Total Revenues (\$M)	\$48.0	\$51.6	7%

### Sault Ste. Marie Hotel and Motel Performance

	2013	2014
Rooms	1,202	1,249
Annual Occupancy	50.6%	53.1%
Average Daily Rate	\$105.48	\$103.60
Room Revenues (\$M)	\$23.4	\$25.1

- Both Algoma Country and Sault Ste. Marie saw a 7% increase when comparing total revenue from 2013 to 2014.
- Unit rental revenue accounted for 65% of total revenues for fixed roof properties in Algoma Country.
- Total rooms revenue generated by hotels and motels in Algoma Country reached \$31.8 million in 2014, of which 57% derived from Sault Ste. Marie properties.
- TNO will encourage, and possibly facilitate, similar data collection for 13A and 13C in the coming year.

### Region 13 Summary - Positive Trends In The Marketplace

- 2014/15 saw the Canadian dollar fall dramatically, proving to be beneficial to tourism operators and in particular those who charge in Canadian Dollars.
- American tourists continue to see RTO13 as a destination of choice, with US visitors contributing 12% of all visits and 25% of all spending in the region.
- Angling specifically and outdoors tourism in general continue to be the top reason for visiting RTO13.
- In 2012, there were 8.1 million visits in Region 13, accounting for 6% of total visits to Ontario. Visitors to Region 13 spent \$1.5 billion, or 7% of total visitor spending in Ontario. Visits were up 7.0% and spending was up 12.5% compared to 2011.
- Ontario residents accounted for the majority of visits and spending, residents of Other Canada accounted for 8%

of visits and spending, U.S. visitors represented 12% of visits and 25% of expenditures, 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 3 times as much per trip as same-day visitors (see Table 4).
- The largest proportions of expenditures were spent on food & beverage and transportation.
- 40% of Ontario visitors to Region 13 reside in Region 13a, 18% in Region 13c and 9% in Region 13b.
- The total number of direct and indirect jobs from tourism is 15,100 or 3.9% of the regions employment.
- 56% of Other Canada visitors came from Manitoba with 41% from Winnipeg.
- 77% of U.S. visitors came from Border States with 28% from Minnesota and 26% from Michigan.
- Ontario's 9 overseas target markets accounted for 61% of overseas visitors to Region 13. Overall overseas visits represent less than 1% of visitation or spend.

## Northern Ontario Tourism Research Summary

Over the past three years, 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 (2013, enhanced 2015)
- Snowmobile Touring (2014)
- Nature and Outdoors (2013, enhanced 2015)
- Visit Friends and Relatives tourists (2015)
- Major Urban Centre tourists (2015)
- Overview of other tourism related opportunities (enhanced 2015)

## 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 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).

- 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).
- 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. Fishing, hunting, motorcycle touring and seeing friends and relatives are segments with strong motivational elements whereas festivals and events or attractions more commonly provide tourists with things to see and do on a trip taken to see friends and relatives or for general pleasure purposes.
- The physical realities of distance from major population centres, limited transportation corridors and climate restrict the size of potential markets for Northern Ontario.

**Table 1:** Tourists vote with their feet . . . activities on overnight visits

	To Canada	To Northern Ontario
Any outdoor activity	37%	52%
Any hunting/fishing	7%	27%
Fishing	6%	25%
Hunting	1%	3%
Any nature-based <sup>1</sup>	24%	39%
Any cultural/entertainment activity <sup>2</sup>	16%	17%
VFR Purpose	56%	39%
Major Urban Tourists	1%	14%

Special Tabulations, Updated to TSRC 2013; ITS 2012 prepared by Research Resolutions.\*Less than 0.5%.



**Table 2:** Northern Ontario's Overnight Tourists' Place of Residence

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

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 Marketshares

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)

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

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 Overnight Tourists in Northern Ontario (All)

	All Tourists
Per Trip Spending	\$416.00
Per Night Spending	\$119.00

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





# STRATEGIC OVERVIEW

## Governance & Administration

### STRATEGIC OBJECTIVE:

1. *Enhance organizational excellence, with consistent adherence to Board policies and procedures, and compliance with provincial Conflict of Interest policies.*
2. *Ensure roles are effectively allocated and responsibilities (including reporting procedures) are being adhered to and reviewed for efficacy.*
3. *Ensure service contracts with outside organizations reflect TNO mandate.*
4. *Establish quantifiable performance metrics with clear targets across all pillar areas, to ensure TNO strategic efforts are translating into improved regional performance.*
5. *Continue to enhance awareness of TNO and its activities within existing stakeholder groups - industry and institutional; and build profile of TNO for new stakeholders.*
6. *Improve capacity for communication and outreach across Northern Ontario, and develop advocacy position on key industry issues.*

The overall Governance goal for TNO, as identified in the SIP, is to support the organizational excellence of the organization. The Board is expected to provide advice to staff, monitor progress for the SIP and keep track of strategic pillar initiatives. In 2015/16, TNO undertook a Governance Refresher that resulted in a complete restructuring of the board to address conflict of interest concerns. Feedback received on the new structure of the Board, which includes reduced membership based on core skills and expertise as opposed to geographic representation has been very positive, with indications of more meaningful conversations and more strategic decision making.

The sub-regional leads and other support organizations that hold contracts with TNO are no longer on the Board, but are being considered for a Tourism Advisory Committee, for which terms of reference have recently been issued. It is expected that this committee will act as a two-way vehicle between the Board, and it is recommended that Minutes from Board meetings are shared with committee members.

An ongoing contract has been established with a governance consultant to ensure continued success of the organization. As TNO continues to set up new working groups and committees to assist with the implementation of TEN, partnership task force, etc., it will be necessary to continue to work with the governance specialist to ensure Board Structure, Policies and By-Laws are compliant, and terms of reference for Working Groups are updated.

Finally, a TNO board committee will be formed in Year 2 to undertake a formal annual performance review for the Chief Staff Officer and ensure succession planning is in place for this role, inclusive of TNO office relocation guidelines. Further, adherence to the quality and professional standards guidelines, which have been prepared for TNO staff, will also need to be encouraged for Board members.

2015/16 was a key year for restructuring the TNO Board and establishing the groundwork for organizational excellence, as the organization expanded from three full-time equivalents to six employees (5 full-time, 1 part-time) in 2015. With respect to operational policies, TNO now has an updated Operating Policy Manual. TNO also undertook an Organizational Capacity Assessment to better understanding its support contracts, and this document will be used to determine new contract expectations going forward.

TNO working groups were formerly based on geography and sector. However, it is evident that all pillars are

connected, and representative group members should no longer be working in silos. As such, TNO has established terms of reference for 9 TNO Product Groups, Tourism Advisory Group and Priority Pillars Working Group. In Year 2, TNO will need to clarify roles for both Staff & Working Groups going forward, and create / update a TNO Organizational Chart, to ensure roles and responsibilities are clearly understood by all stakeholders. The Organizational Capacity Assessment results can also be used to maintain a database of industry partners and their respective capacity levels. TNO will need to continue to review all new and existing contracts in order to ensure its mandate is being followed.

Once the new website is functional, TNO will set up a Performance web page and track performance metrics for all 9 pillars, thereby demonstrating transparency and accountability. In order to ensure TNO strategic efforts are translating into improved regional performance, TNO will also encourage operators to track their own performance, particularly following updates to TNO's research program, and develop a "chatroom" or blog for operators to communicate successes, discuss industry issues, etc. through the new website.

In 2015/2016, TNO's main communication focus was to enhance awareness of the organization and improve its capacity for outreach to as many stakeholders as possible. Highlights in the Communication & Outreach pillar for Year 1 of the SIP implementation include the full transition of the Northern Ontario Tourism Summit into a stand-alone industry event with NOTO, finalization of the TNO Communications Plan, and the provision of strong advocacy support for TIAO. With these initiatives complete, TNO's focus in Year 2 will be to truly develop the organization's role as an "authority" on the tourism sector in Northern Ontario, particularly in terms of the improving quality of tourism operations in Northern Ontario.

In conjunction with new programs and the continued

transition to incorporate more platforms for operators and visitors to communicate, TNO will allocate funding for a full revamp of the TNO website. This website will link to the NOTS and TEN website, and form a more flexible platform for incorporating future requirements of the new Marketing Strategy, including enhanced social media links and separate web pages for each pillar (e.g. dedicated pages for the investment attraction resource centre and workforce development training calendar). The TNO Communications Plan will also be used to enhance social media tactics, and press release format and content, which will assist in standardizing communication style. Adherence to this plan will also be worked into all support contracts. Recognizing that not all stakeholders are online, it will be important to develop a plan to reach remote operators as well, which may be a function of the sub-regional leads across the Region. Further, in an effort to continue to build awareness of organizational activities, TNO will develop a plan to improve engagement with Northern Ontario's francophone community – including both operators in and visitors to the region.

With the success of the Northern Ontario Tourism Summit, as evidenced by improved registration and strong speakers, TNO will need to continue to assess the efficacy of the event and improve proceedings year over year using feedback provided by delegates. Similarly, TNO will continue to distribute Industry Awareness and Satisfaction Surveys and follow-up on areas of improvement within the sub-regions. The suggested NOTO membership is also expected to provide updated information on regional industry issues to assist TNO in its advocacy support, but there are also opportunities for TNO to engage in more research sharing with other organizations (i.e. MNM – as part of the Growth Plan initiatives) and to promote good new stories of tourism-related events with Northern Ontario media sources.

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## Product Development

### STRATEGIC OBJECTIVE:

1. *Implement an experience shift, focusing on "best bet" products and experiences for Northern Ontario.*
2. *Implement TNO's Wayfinding Strategy and Initiate Visitor Information Centre Training.*
3. *Implement a quality shift, building consistent quality offerings and customer experience, through the TEN program.*
4. *Continue efforts to translate product development and target market research into action, and track results.*
5. *Develop and implement a Strategic Research Plan to track tourism business performance.*

Despite a significant level of restructuring at the organizational and Board level, TNO remained focused in 2015/2016 on achieving Experience, Quality and Culture Shifts in relation to the Product Development pillar. Most of the tasks that were identified for implementation in Year 1 are well-underway.

Under the Experience Shift, a key task was to orient product groups & develop a Year 1 plan. Terms of reference were drafted for nine product groups, and the Product Development Symposium became a key focus for the Northern Ontario Tourism Summit. Five of these groups now have dedicated projects ready to implement, and TNO will leverage its budget to take advantage of specific funding available for product development related projects through NOHFC and FedNor in 2016/2017. With respect to other Provincial product development priorities set by MTCS and OTMPC, in Year 2, TNO will have the opportunity to work with Aboriginal Tourism Ontario and assist with defining relevant products and experiences for Francophone communities.

In an effort to consolidate the budget and amalgamate resources, Year 2 priorities related to Wayfinding

have been incorporated into the Experience Shift. To date, TNO has continued to work on communicating the results of the Wayfinding Strategy and the corresponding implementation of the strategy with Corbin Design. A pilot program for a Wayfinding System Action Plan was implemented in Thunder Bay, the results of which will be used to gauge success in smaller communities in Year 2. TNO also issued a survey to the VICs to gather information and better understand their existing needs in relation to wayfinding in Year 2. This data will be used to develop a Wayfinding training program for VICs in 2016/2017.

A lot of progress has been made in relation to achieving a Quality Shift in Northern Ontario. The TEN Project Plan is in place, and the former steering committee is now a Management Committee. Funding applications are in place with commitment from RTO12, and funding from FedNor has been secured for 2016/2017 to initiate the full rollout of TEN in Year 2. While managing the rollout of TEN, it will be important to ensure training roles are filled and all interested operators are able to find relevant information. Further TNO has the opportunity to investigate a survey to gather guest feedback on quality improvements, which will provide key performance measures to track in future.

As part of the Culture Shift, TNO retained a third party consulting team in Year 1 to identify capacity and potential assistance from support organizations. As an option for expanding the sub-regional lead pillar initiatives, TNO may consider utilizing their assistance for outreach and training for operators relative to the TEN program. Also, in order to meet the overall goals of the SIP, it was recommended that TNO initiate a budget shift to non-marketing pillars. In Year 1, with the SIP just underway and under new sub-regional lead contracts, only a minor shift in budgets was achieved. More significant changes have been considered upon review of 2015/2016 results. In 2015/2016, TNO initiated its two-prong approach to research: 1) continued product-related and target

market research and 2) the introduction of new initiatives in tracking tourism business performance.

With respect to product-related research, the focus was on three markets: VFR (visiting friends and relatives), non-avid anglers, and the urban gateways. Since limited data remain in the existing primary product pillars, research needs for Year 2 are focused on other growing tourism product markets (i.e. culinary tourism), and learning more about the markets that are already visiting. As such, major initiatives include a data segmentation project, researching barriers to entry and regulatory issues impacting product development and researching the broader economic impact of tourism on the Great Lakes Watershed. Other research includes working with Ontario Parks to better understand the campground visitor.

Algoma Country, in conjunction with TNO, retained PKF to assist in the survey distribution and analysis of an Operator Performance Survey in 2015/2016. As a Year 2 initiative, TNO has indicated an interest in expanding this research across the region, in partnership with the sub-regional lead organizations. The data compiled through this research project can be consolidated to communicate industry performance to the operators and the public, with the end goal of being able to compare operator data with tourism receipts and identify growth trends in Northern Ontario. It is also recommended that TNO develop a working group to work with staff to coordinate with the Product Groups, identify other potential key performance indicators to track in other types of tourism operations, and to manage a plan for tracking business operator performance in Northern Ontario.

Another Year 1 initiative under the Research pillar was the development and maintenance of a Northern Ontario Operator Database. This took on a sub-regional focus, with NeONT and Algoma Country maintaining databases for 13A and 13B, and the 13C Coordinator compiling data for Northwestern Ontario. Maintenance of this database will continue as a Year 2 initiative.

## Marketing

### STRATEGIC OBJECTIVE:

- 1. Continue to align and coordinate programs/tactics common to all sub-regions, and encourage collaborative marketing intra-regionally – leading with products/experiences.**
- 2. Refresh and implement new 5-year Marketing Strategy with OTMPC's Northern Office.**
- 3. Ensure customers are easily connecting with Northern Ontario operators through appropriate marketing vehicles.**

There was a significant focus in 2015/16 on developing new contracts for the former Marketing Leads (now sub-regional leads), and attempting to incorporate new pillar area initiatives. The Marketing Strategy refresh, which was originally expected to be a Year 2 initiative, is now expected to be managed through a working group in conjunction with OTMPC. The refreshed Marketing Strategy will be prepared at a high level, based on recognized products / experiences and target markets, and be accompanied by an Implementation Plan. It is strongly suggested that this Marketing Plan incorporate a full Digital Strategy as well, incorporating ongoing maintenance of the Northern Portal. In the meantime, sub-regional leads are expected to continue to provide content to the Northern Web Portal and encourage packaging and online sales.

As such, the focus in Year 2 will be on streamlining Marketing reporting processes with the sub-regional leads and ensuring tactics are aligned with Product Development initiatives. There is an opportunity for TNO to organize workshops for product development contacts and marketing leads to discuss criteria for project market-readiness and to direct promotion of new products and experiences in Northern Ontario. This involves establishing roles and responsibilities for the Tourism Advisory Group and its working relationship with the Priority Pillar group.

Key pan-northern Marketing projects for Year 2 include: developing a regional TripAdvisor site, expanding opportunities for international & US Travel Trade marketing, encouraging packaging and online sales, and looking for alternatives to the Meridian system (i.e. OTMPC digital applications for packaging). The Regional TripAdvisor project will be undertaken in partnership with OTMPC, RTO12, sub-regions and other communities across Northern Ontario. TNO will also need to continue to tie marketing initiatives into existing priorities for MTCS and OTMPC, and to grow opportunities for consumer and operator feedback to ensure customers are connecting with Northern Ontario operators, i.e. through social media and on TripAdvisor.

### Sub-Regional Marketing:

The following provides the marketing strategies that will be implemented in 2016/17. The marketing services have been contracted to sub-regional leads that will be delivering the initiatives on behalf of TNO for the year. Organizations in each of the three sub-regions are executing traditional marketing efforts in their unique travel corridors. To ensure alignment, the following segments will be focused on:

1. Fishing and Hunting
2. Nature and Adventures
3. Motorsports and Touring
4. Festivals and Attractions
5. Meetings, Conventions and Sports Tourism

In addition, the above marketing segments, TNO has contracted services for the Northern Portal to each sub-regional lead. The objectives and outcomes of the portal will remain consistent for all of the service providers.

TNO will contribute significant investment to the overall marketing plan. The following charts provide an overview of the investment by tactic, geography,

and segment as it relates to Northern Ontario.

### Northern Portal:

The Northern Portal will continue to provide an opportunity to create awareness about Northern Ontario tourism leading to a positive economic impact for 2016-2017.

### Target Audience:

As each sub-region has varying markets, the content on the portal will be customized and tailored to suit. The objective is to use the portal as a lure to drive traffic to the sub-regional leads/operators websites. Through search engine optimization the site will target users exploring travel options online. Travellers may be domestic, U.S. and international seeking information about a variety of aspects including touring, outdoor adventure, culinary, cultural, event and attraction experiences.

## Workforce & Industry Training

### STRATEGIC OBJECTIVE:

- 1. Work in collaboration with regional partners to leverage funding resources and implement workforce training plans.**
- 2. Build TNO's Role as a Resource to Educate Stakeholders on Training Opportunities across the region.**

Under the new SIP, TNO continues to take on a resource / reactive role in relation to Workforce Development & Industry Training related activities. In 2015/16, TNO focused on communicating the results of the TNO Regional Tourism Workforce & Training Strategy, and the sub-regional Labour Market Initiatives. Outreach included presentations to six Workforce Planning boards in Northern Ontario, who were very receptive and plan to come as a collective and present at the November Summit. With the Labour Market Initiatives focused directly on the

sub-regions, TNO has the opportunity in Year 2 to allocate these partner organizations to identify priority activities, and potentially include resources from First Nations communities for implementation.

In Year 2, in order to fully focus on new Product Development endeavours re: TEN and Wayfinding, and relevant training required for Research programs, i.e. tracking business performance, TNO will create and develop a focused training maintenance plan for stakeholders. Furthermore, TNO will remain involved in providing content and communicating information related to the database of training opportunities and training calendar. Where stakeholders are interested in other types of training, i.e. business planning and succession planning, TNO can still play a role in consolidating programs through the online training calendar. There may also be an opportunity for TNO to work with local Colleges to provide a consolidated space for group training. As such, TNO will also consider opportunities for renewed sponsorship and alignment of training programs via OTEC, Northern Ontario Colleges and other partner organizations, to ensure stakeholders have the opportunity to apply for Canada-Ontario Jobs Grant.

Tracking performance of existing training programs is an ongoing process, and in Year 2, TNO will need to seek more feedback on the industry's usage of relevant training initiatives in order to properly track the impact of training on the industry. This could be done in partnership with the Workforce Planning Boards. It is also suggested that TNO purchase a membership with NOTO to obtain information on existing industry issues, particularly those related to training for new products and systems, which TNO can communicate to its stakeholders.

## Investment Attraction

### STRATEGIC OBJECTIVE:

- *Build the bridge to connect Northern Ontario's investment community partners with funding*

### *agencies and encourage investment attraction across the Region.*

With outside support on the research and implementation side, TNO has the opportunity to be a leader in Northern Ontario and amongst all RTO's in Ontario, in becoming a tourism investment resource base. Through an existing contract in 2015/2016, TNO developed an investment attraction resource centre on the Tourism Northern Ontario website, as well as an Investor 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, TNO also surveyed local economic development stakeholders to create an inventory of investment attraction opportunities – and develop a contact database. This survey will be distributed on an annual basis, with TNO staff members periodically communicating with economic development officers / tourism managers across the sub-regions to help maintain participation. TNO also featured a workshop on Public Private Partnership 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). Another big “win” for TNO was the identification of tourism as a recognized industry in the Growth Plan for Northern Ontario by MNDM at the Summit.

In 2016/2017, TNO will need to maintain and update the Investment Attraction Resource Centre and Investor Toolkit, in conjunction with the new website development, continue to maintain communication with local economic development stakeholders to add to the inventory of investment attraction opportunities, and encourage more two-way communication with funding agencies (i.e. NOHFC, FEDNOR, BDC, etc.). As a new Year 2 initiative, TNO will be coordinating grant writing for funding applications and tracking the number of applications that have led to successful funding initiatives. With NOHFC's announcement of

\$10 Million available for tourism related initiatives, TNO has a responsibility to continue “building the bridge” to connect members of Northern Ontario's investment community partners with funding agencies.

## Partnerships

### STRATEGIC OBJECTIVE:

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

In 2015/2016, the direction for the Partnership Program was to create more strategic partnerships and synergies across the region, as opposed to ad hoc projects by sub-region. One of the major challenges with this program in the past was embedded in the reporting structure; however, with increased staffing, this is no longer a major issue and the organization has developed many long-term partnerships.

In 2016/2017, TNO will begin the year by developing a task force through the Board to look at 2014/15 results and reviewing the efficacy and outcomes of prior year projects, with the aim of aligning 2016/17 partnership criteria at the start of the new fiscal year and developing a plan to seek out specific projects that are aligned with Year 2 SIP initiatives. This will likely involve finding new “non-traditional” partners from public and private sector sources through direct outreach. TNO will leverage funding opportunities to match partner and the MTCS allocation to undertake partnered initiatives that align with TNO's strategic pillar initiatives.

As at December 2015, the value of Partnership projects was estimated at \$3.4M for 2015/16. This should be used as the benchmark for setting a target in 2016/17. It will also be necessary for TNO to set targets and track the success of partnership projects on an annual and ongoing basis.



## Business Operations

Tourism Northern Ontario is a not-for-profit organization that works to build a competitive and sustainable tourism industry in Northern Ontario (includes sub-regions 13A, 13B and 13C), to attract an increased number of visitors to the region, to encourage increased spending and to achieve the goals and objectives of “Discovering Ontario, a Report on the Future of Tourism”.

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 core of the board is made up of directors from each sub-region representing both urban and rural

tourism interests. These directors are identified through a sub-regional process.

This modular structure allows the Board to come together regularly on a pan-Northern basis yet function in smaller groups to make sub-regional and sector decisions. 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, FedNor, Ontario Parks and Parks Canada.

### Board of Directors

Name	Position	Sector
<b>Marty Kalagian</b>	President	Regional Operator
<b>Gerry Webber</b>	Vice President	Tourism
<b>Heather Gropp</b>	Secretary Treasurer	Small Municipality - City of Kenora
<b>Ray Nadeau</b>	Director	Municipal Operator - Victoria Inn
<b>George Stivrins</b>	Director	Municipal Operator - Georgian Bay Cruise Co
<b>Betty McGie</b>	Director	Operator at Large - Watson's Algoma Vacations Ltd.
<b>Tammy Frick</b>	Director	Board Appointed - Cinefest
<b>Dr. Rhonda Koster</b>	Director	Board Appointed - Lakehead University
<b>Ian Wood</b>	Director	Board Appointed - City of Greater Sudbury

### Government Advisors

Name	Position	Sector
<b>Graham Campbell</b>	Advisor	Ministry of Northern Development & Mines
<b>Laurie Brownlee</b>	Advisor	Ministry of Tourism, Culture & Sport
<b>Chris Milner</b>	Advisor	Ontario Tourism Marketing Partnership Corporation
<b>Nancy Rosset</b>	Advisor	Industry Canada - FedNor
<b>Lori Waldbrook</b>	Advisor	Ontario Tourism Marketing Partnership Corporation Ontario Parks
<b>Pamela Jalak</b>	Advisor	Parks Canada

To implement the specific initiatives outlined in this business plan, Tourism Northern Ontario currently has the following staffing complement.

### Staff

Name	Position	Sector
<b>David MacLachlan</b> (705) 575-9779 david.maclachlan@tourismnorthernontario.com	Executive Director	Sault Ste. Marie Office
<b>Patricia Forrest</b> (807) 577-0137 pat.forrest@tourismnorthernontario.com	Coordinator - Initiatives and Partnerships	Kakabeka Falls Satellite Office
<b>Andre Duhkia</b> (705) 491-1861 andre.duhkia@tourismnorthernontario.com	Coordinator - Product & Workforce Development	North Bay Satellite Office
<b>Stephanie Pagnucco</b> (705) 575-9779 stephanie.pagnucco@tourismnorthernontario.com	Coordinator - Marketing & Investment Attraction	Sault Ste. Marie Office
<b>Karen Tait-Peacock</b> (705) 596-2228 karen@tourismnorthernontario.com	Coordinator - Tourism Excellence North	Sudbury Satellite Office
<b>Karen Poirier</b> (705) 575-9779 karen.poir@tourismnorthernontario.com	Office Administrator	Sault Ste. Marie Office
<b>Marla Tremblay</b> (705) 499-6267 marla.tremblay@tourismnorthernontario.com	Coordinator - Francophone Engagement	Sudbury Satellite Office New for 2016-2017

During 2015, the staff complement at Tourism Northern Ontario grew from three full-time positions to six full-time and one part-time position. This change in capacity is directly correlated to the implementation of TNO's strategic plan. New staff members include a tourism coordinator working out of the Sault Ste. Marie Office, a tourism coordinator Francophone Engagement working out of Sudbury, a tourism coordinator working out of North Bay, and the recent addition of the Sudbury-based coordinator to move Tourism Excellence North forward.



## Organizational Hierarchy

### Risk Management

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

It is the duty of the Executive Director in consultation with the TNO Board to monitor, plan and ensure the staff compliment is adequate to carry out initiatives. Where warranted, TNO may consider the option of contracting outside firms for specific tasks through a fair and transparent procurement process.

Where provisions for delivering on this plan are through service agreements, the TNO 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.



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## 2015-2016 Financial Plan

### Funding and Allocations

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

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.

### Budget

April 1, 2015 to March 31, 2016

Governance and Administration		
<b>Administration</b>		
Salaries and Benefits	\$ 325,164.00	
Staff Travel & Meetings	\$ 30,000.00	
Rent and Office Overhead	\$ 40,000.00	
Office Supplies and Equipment	\$ 15,000.00	
Accounting, Legal, Professional Fees	\$ 15,000.00	
Insurance	\$ 10,000.00	
Training	\$ 5,000.00	
Performance	\$ 20,000.00	\$ 460,164.00
<b>Governance</b>		
Board Governance Review	\$ 25,000.00	
Board Travel and Meetings	\$ 35,000.00	\$ 60,000.00
<b>Communication and Outreach</b>		
Data Base Management	\$ 10,000.00	
Stakeholder Engagement	\$ 70,000.00	
Francophone & Indigenous Engagement	\$ 30,000.00	
Memberships	\$ 15,000.00	\$ 125,000.00
		<b>\$ 645,164.00</b>



Product Development		
<b>Research</b>		
Great Lakes Tourism Research	\$ 25,000.00	
Product-Market Research	\$ 25,000.00	
Industry Performance Research	\$ 25,000.00	\$ 75,000.00
<b>Experience Shift</b>		
Angling	\$ 5,000.00	
Automobile & RV Touring	\$ 20,000.00	
Cycling	\$ 20,000.00	
Gateways and Urban Communities	\$ 5,000.00	
Cultural (Group of Seven)	\$ 20,000.00	
International	\$ 20,000.00	
Nature and Adventure	\$ 5,000.00	
Snowmobile	\$ 5,000.00	
Product Development Symposium	\$ 25,000.00	\$ 125,000.00
<b>Wayfinding</b>		
Signage	\$ 25,000.00	
Digital Application	\$ 30,000.00	
VIC Coordination and Training	\$ 70,000.00	\$ 125,000.00
<b>Quality Shift</b>		
Tourism Excellence North	\$ 225,000.00	\$ 225,000.00
		\$ 550,000.00

Marketing		
<b>Pan-Northern Marketing Initiatives</b>		
Packaging and On-line Sales	\$ 15,000.00	
International Markets	\$ 50,000.00	
TripAdvisor	\$ 25,000.00	
Data Segmentation	\$ 25,000.00	
Planning, Performance & Reporting	\$ 15,000.00	
Northern Web Portal (Operations/Francophone)	\$ 90,000.00	
Marketing Strategy Implementation	\$ 14,000.00	\$ 234,000.00
<b>Sub-regional Marketing Initiatives - 13A</b>		
Angling & Hunting	\$ 150,000.00	
Nature & Adventure	\$ 150,000.00	
Touring	\$ 94,000.00	
Attractions, Festivals and Events	\$ 84,000.00	
Meetings, Conventions and Sports	\$ 19,000.00	
General Marketing	\$ 300,000.00	
Northern Web Portal (Content Acquisition)	\$ 140,000.00	\$ 937,000.00

Continued on next page

Marketing - Continued		
<b>Sub-regional Marketing Initiatives - 13B</b>		
Angling & Hunting	\$ 125,000.00	
Nature & Adventure	\$ 34,000.00	
Touring	\$ 60,000.00	
Attractions, Festivals and Events	\$ 249,000.00	
Meetings, Conventions and Sports	\$ 35,000.00	
General Marketing	\$ 65,000.00	
Northern Web Portal (Content Acquisition)	\$ 140,000.00	\$ 708,000.00
<b>Sub-regional Marketing Initiatives - 13C</b>		
Angling & Hunting	\$ 440,000.00	
Nature & Adventure	\$ 165,000.00	
Touring (includes attractions)	\$ 80,000.00	
Meetings, Conventions and Sports	\$ 45,000.00	
General Marketing	\$ 200,000.00	
Northern Web Portal (Content Acquisition)	\$ 140,000.00	\$ 1,070,000.00
		\$ 2,949,000.00

Workforce and Industry Training		
Training Plan	\$ 25,000.00	
Training Resource Centre	\$ 35,000.00	
Awareness	\$ 15,000.00	
		\$ 75,000.00

Investment Attraction		
On-line Resource Centre	\$ 25,000.00	
Awareness	\$ 25,000.00	
		\$ 50,000.00

Partnership		
<b>Marketing</b>		
Tourism Awareness	\$ 50,000.00	
Stay2Play	\$ 37,500.00	
Urban Gateways	\$ 47,500.00	
Northern Ontario Digital	\$ 37,500.00	
North Bay Digital	\$ 10,000.00	
<b>Product Development</b>		
Community Wayfinding	\$ 125,000.00	
Trails Wayfinding	\$ 52,500.00	

Continued on next page

**Partnership - Continued**

<b>Product Development</b>		
Mountain Biking Master Plan	\$	25,000.00
Culinary Food Forum	\$	50,000.00
Outfitting Sector Strategy	\$	25,000.00
Learn to Fish	\$	30,000.00
Auto & RV Touring	\$	30,000.00
Group of Seven	\$	60,000.00
St. Mary's Festival & Event	\$	12,500.00
<b>Workforce &amp; Industry Training</b>		
Northern Ontario Tourism Summit	\$	12,500.00
Partner Contributions	\$	605,000.00
		<b>\$ 1,210,000.00</b>

<b>Total Expenses</b>	<b>\$ 5,479,164.00</b>
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**Budget** April 1, 2016 - March 31, 2017.

Budget Items	2015-16	2016-17	%
Investment by Area of Focus			
Governance, Administration, Outreach	\$578,000	\$645,164	12%
Product Development	\$500,000	\$550,000	10%
Marketing	\$3,370,000	\$2,949,000	54%
Workforce and Industry Training	\$25,000	\$75,000	less than 1%
Investment Attraction	\$50,000	\$50,000	less than 1%
MTCS Partnership Allocation	\$605,000	\$605,000	11%
Matched Partnership Contributions (minimum)	\$605,000	\$605,000	11%
<b>TOTAL</b>	<b>\$5,733,000</b>	<b>\$5,479,164</b>	<b>100%</b>



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