



DESTINATION  
**NORTHERN  
ONTARIO**

**2019-20**

# **Business Plan**

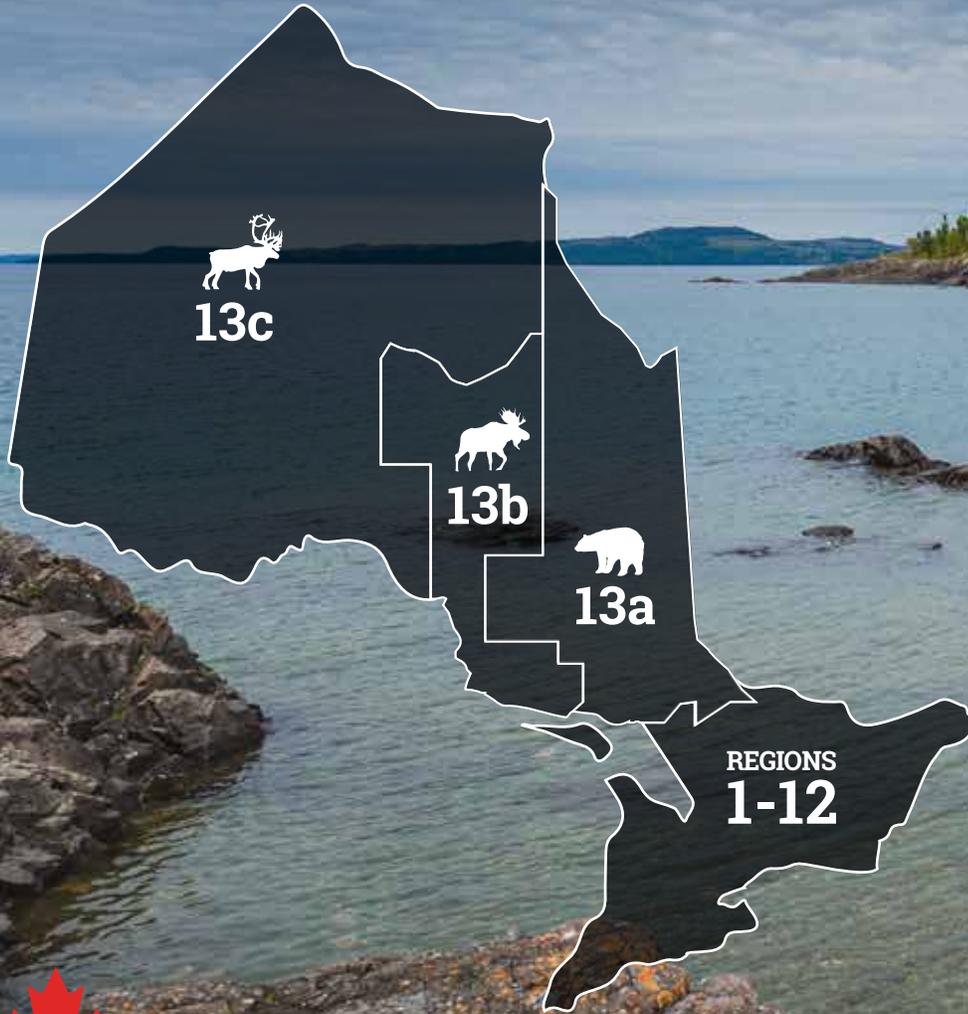


Ontario

[destinationnorthernontario.ca](http://destinationnorthernontario.ca)



# RTO #13



DESTINATION  
**NORTHERN  
ONTARIO**

# 2019-20 Business Plan

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## MESSAGE FROM THE PRESIDENT

As President, it has been my privilege again this year to travel throughout our vast region, meeting a multitude of our industry partners and learning about their successes, hearing their ideas and discussing the challenges that they are facing. It has been this type of outreach that has enabled us to prioritize our activities and grow our industry, as has been evidenced by very positive tourism numbers in the past few years.

How do we help to build an ever-stronger tourism industry in Northern Ontario? With tourism playing such a vital role in our economy here in the North, it's a question that we at Destination Northern Ontario ask ourselves regularly and particularly when we are working on our annual business plan and our strategic plans.

In times of fiscal restraint such as the one that we are currently facing, it's a question that becomes much more challenging to answer - but it was a challenge that we approached with a "can do" attitude. I'm a believer in the saying, whether you think you can, or you think you can't - you're right. We approached the cost reduction process with a positive attitude and our usual strong focus on doing what we believe is best for our tourism industry partners.

With a 20% cut totalling almost \$1 million in reductions for the 2019-20 fiscal year mandated by the Province, we have had to work harder than ever to adjust to our new fiscal reality. It is a testament to the dedication and innovation of our staff, our Board of Directors and our government advisors that we have been able to achieve the program and budget modifications required and still be confident that we will reach our organization's vision and goals in support of our Northern Ontario tourism industry.

Everyone is needed, invited, and welcome more than ever to be a part of keeping our beautiful region and its \$1.6 billion tourism industry moving forward. As usual, we are excited to work with you again in 2019-20.

Yours in tourism,

**Marty Kalagian,**  
President.



## MESSAGE FROM THE EXECUTIVE DIRECTOR

Formed at the direction of Northern Ontario tourism businesses who agreed that a pan-Northern organization was needed to lead economic growth in tourism for the region, we've accomplished a lot in a relatively short timeframe. As we prepare for the upcoming year facing some new fiscal challenges, I wanted to highlight some of our successes to date.

Destination Northern Ontario leverages its core budget by more than 50% each year. This results in an additional \$3 million being invested into tourism development across the North.

Our partnership program is extremely successful each year. An average of 70 tourism businesses and organizations partnered with us annually to leverage our partnership fund by nearly 500%.

Working with the sub-regional leads our collective marketing efforts have resulted in 4.3 million visits to websites annually and has grown our online social community to nearly one million followers.

Through Destination Northern Ontario's support of e-commerce development in the region, direct trackable sales for Northern Ontario products and experiences totaled \$2.1 million in 2017.

Over 400 tourism stakeholders have participated in the Tourism Excellence North program; when surveyed 100% said that they would take additional training through this program.

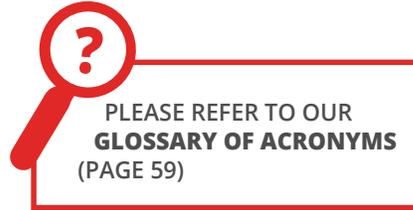
There is no industry that has proven as resilient as tourism. Not only has tourism fully recovered from the "Great Recession" across Ontario we have seen tourism revenues increase by 60% since 2012. Destination Northern Ontario will continue to ensure that tourism is a key economic driver here in the North. We will maintain our focus on our traditional markets including Ontario and the U.S. border states but increasingly we are looking to capitalize on the growing enthusiasm for Northern Ontario products among overseas markets. By increasing our overseas visits by just 2%, we'll realize \$500 million in new tourism receipts.

As always, we thank our growing roster of partners. We're all in this great business together and together we will grow stronger.

Sincerely,

**David MacLachlan,**  
Executive Director.

# EXECUTIVE SUMMARY



Destination Northern Ontario's 2019-20 annual business plan has been revised to reflect a 20% budget cut as directed in the new provincial budget which was released on April 11, 2019. In this new climate of restraint, DNO has carefully reviewed all its initiatives through the lens of protecting programs and activities that provide the most benefit to Northern Ontario's tourism industry. The budget reduction, totalling almost \$1 million, has been achieved through a variety of means including reducing staff costs, relying less on external consulting services, identifying additional partnerships and funding sources and prioritizing initiatives under all five of DNO's pillars which are recognized in the Ontario Ministry of Tourism, Culture and Sport's Regional Tourism Organizations Guide:

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

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

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

As the Province implements its new tourism strategy, Destination Northern Ontario is well positioned to continue to lead tourism growth in the north with vision and innovation.

## Vision

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

## Mission Statement

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

## Values

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

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

## Goals for Northern Ontario Tourism Sector

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

## Destination Northern Ontario's Roles in achieving Sector Goals

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

# Destination Northern Ontario's Organizational Goals

Destination 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, "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 Destination 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.

## Operational Excellence Goals

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

## Industry Leadership Goals

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

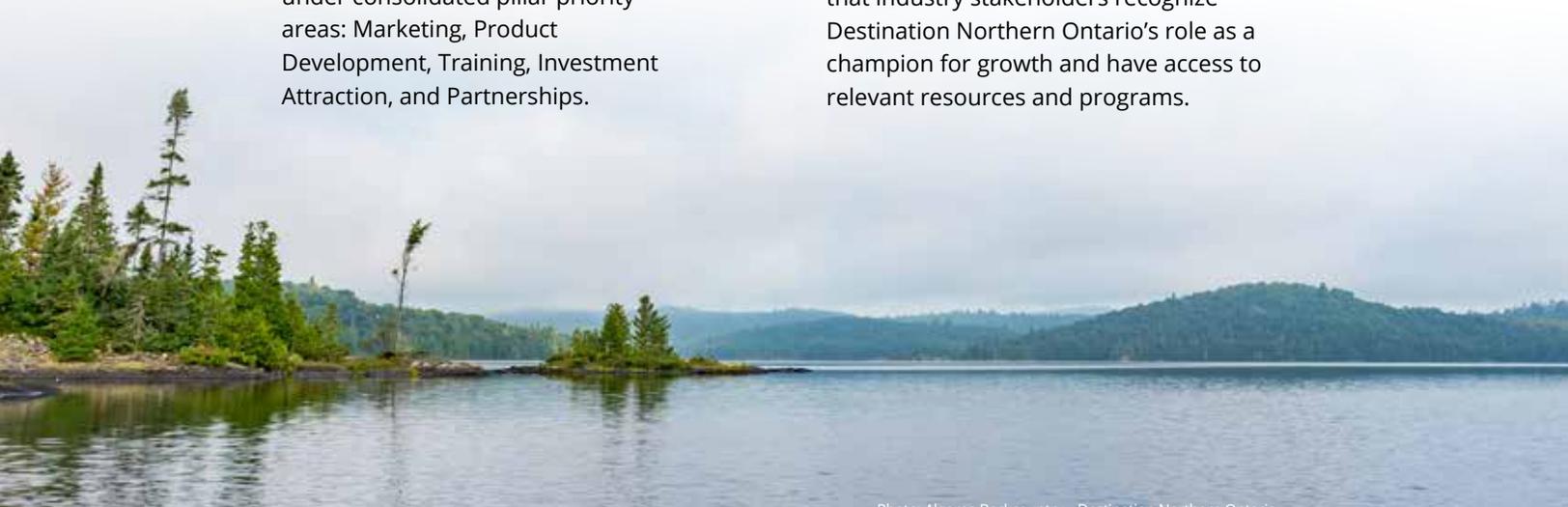


Photo: Algoma Backcountry – Destination Northern Ontario

## Budget

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

The following chart provides a summary of Destination Northern Ontario's budget for the period April 1, 2019 through March 31, 2020.

The total allocation for the region per the Ministry of Tourism, Culture and Sport for 2019-20 is **\$3,930,235.00**. As stated earlier, this represents a 20% reduction in available funding over the same period previously. However, it is expected Destination 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, 2019 to March 31, 2020)

Area of Focus	\$	%
Governance & Administration	\$ 415,235	11%
Product Development	\$ 430,000	11%
Investment Attraction	\$ 25,000	Less than 1%
Workforce Development & Training	\$ 345,000	9%
Marketing	\$ 2,110,000	54%
Partnership	\$ 605,000	15%
<b>Total Eligible Expenses</b>	<b>\$ 3,930,235</b>	<b>100%</b>
Partnership Contributions Goal (minimum \$605K)	\$ 2,000,000	50%
<b>Total</b>	<b>\$ 5,930,235</b>	<b>150%</b>

## Milestones & Success Stories

Destination Northern Ontario was able to successfully leverage the Province's \$605,000 investment upwards to \$ 2.7million of partnered activity in 2018-19. These partnerships ranged from marketing initiatives to product development projects. Destination Northern Ontario implemented 15 partnered initiatives working with 77 partners and leveraging over \$4 million when in-kind contributions are considered.

One of most significant partnerships in terms of industry outreach and training continues to be our annual **Northern Ontario Tourism Summit**. The fifth Annual Summit was held in Sault Ste. Marie and was a great success. The event had approximately **300** delegates in attendance; 50% of guests being tourism operators, with the rest being made up of government officials, and other industry stakeholders. The Summit provided operators and key stakeholders with practical training opportunities such as social media training, provincial policy updates affecting tourism operators, a product development symposium, francophone tourism updates, indigenous tourism updates, a partnership and investment 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. Destination Northern Ontario

worked with partners to define, plan and implement a marketing 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. 25 Tourism Rocks toolkits were produced and distributed to secondary school guidance offices.

Lastly, Destination Northern Ontario's bilingual wayfinding program is transforming communities across the North. Last year, we installed **185** wayfinding signs in eight communities to help visitors find their way through and around Northern Ontario. We are on target to double that figure in 2019-20.

### 5<sup>TH</sup> ANNUAL NORTHERN ONTARIO TOURISM SUMMIT

**300**  
DELEGATES

**50%**  
TOURISM  
OPERATORS

**185**

WAYFINDING  
**SIGNS**  
DEVELOPED

## Northern Ontario & the Overseas Market

Canada is an international tourism destination that is seeing tremendous growth from overseas markets. Destination Canada's Northstar initiative, supported by Destination Ontario, is looking to increase the number of international visitors to Canada to 25 million by 2025. Northern Ontario, with its iconic natural assets and robust tourism industry, has not achieved its full potential in overseas visitation. In 2016 (the most recent statistics available), visits from overseas markets represented only 0.1% of all visits to Northern Ontario yet also represented 2% of the overall visitor spending. By growing the region's overseas visits to 2% of overall visits (the current Ontario average), we would experience an additional \$500 million in added tourism revenues for Northern Ontario.

In 2014 Destination Northern Ontario and its partners initiated a research study and Market Development Plan to evaluate and address the potential to build new business across all sub-regions, focusing on the Travel Trade channel in the U.S. and international markets. Completed in 2015, the Plan stressed that, in the global marketplace, competition demands that tourism partners be strategic, aligned and consistent in their development efforts. The plan stated,

*“Developing the potential of International Travel Trade overseas markets [in Northern Ontario] will require a strategic, long-term commitment of 5-10 years by Destination Northern Ontario and its industry partners. It will be important for Destination Northern Ontario and its partners to align their ITT market development activities with the region’s Product Development Strategy.”*

There is a natural affinity for Northern Ontario and by working with Destination Canada, Tourism Industry Association of Canada, Destination Ontario, Northern Ontario’s urban and regional DMO partners and tourism operators, Destination Northern Ontario will work towards achieving its goal of increasing tourism visitation and spend from the overseas market as priority in 2019-20.

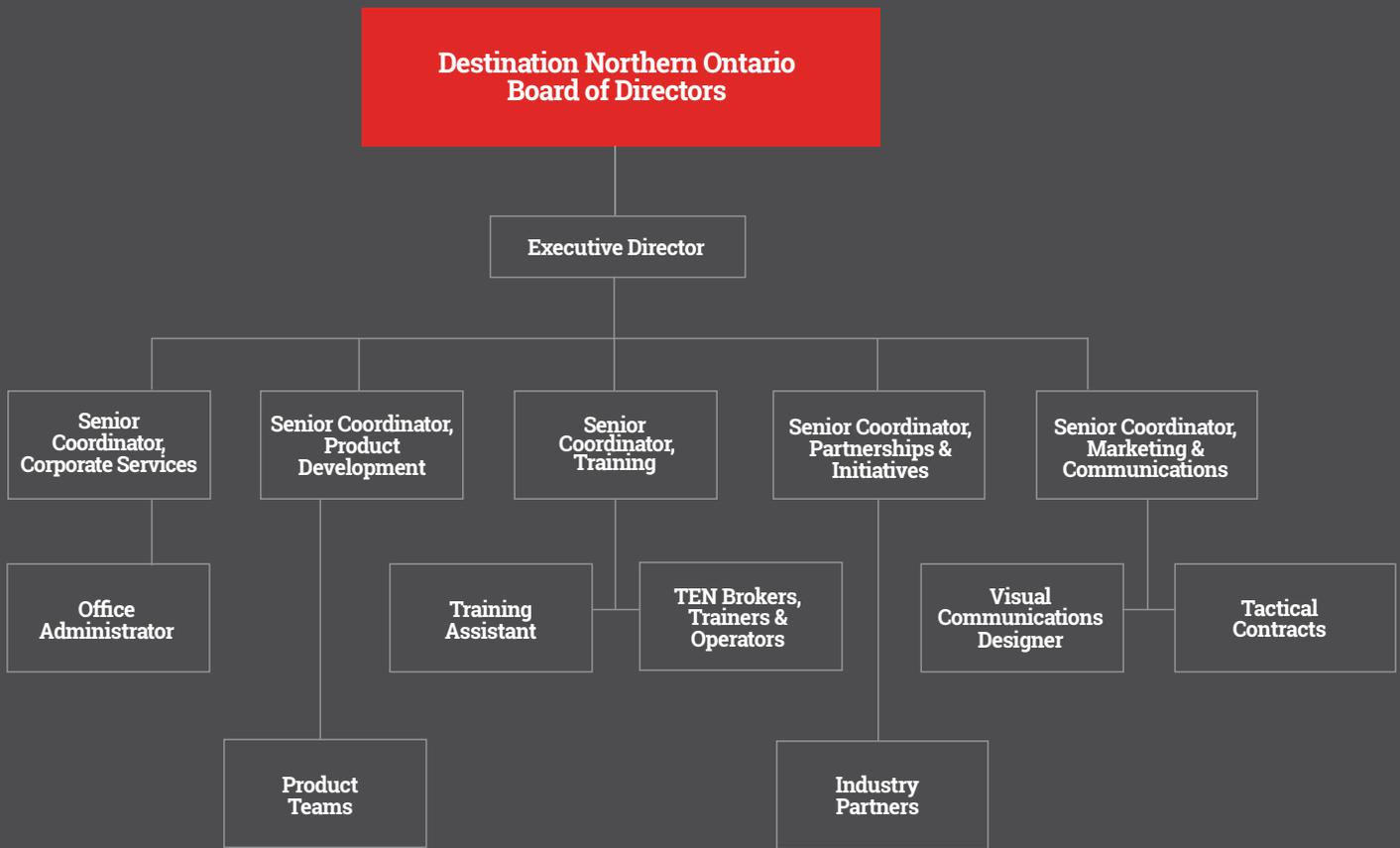
Looking at our tourism products and experiences through this lens is an opportunity to further improve and grow our tourism industry with programming in all mandated pillar areas; product development, investment attraction, workforce and industry training, marketing and partnership.

Destination Northern Ontario will continue to invest in programming geared towards our traditional markets both here at home and in the U.S.A.



Photo: Trans Canada Highway, Lake Superior – Destination Northern Ontario

# ORGANIZATIONAL STRUCTURE

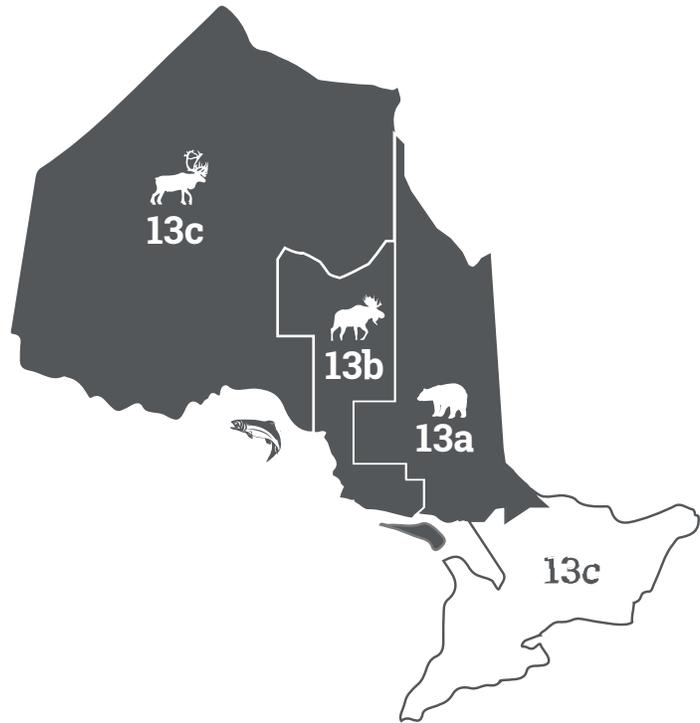


# Business & Operational Overview

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

The Board of Directors regularly consults with and is advised by an advisory group comprised of key government officials in tourism-related ministries and agencies. The advisory group is a key component to the Board of Directors' strategic planning and consultation process.

The representatives are from the Ontario Ministry of Tourism, Culture and Sport, the Ministry of Northern Development and Mines, Destination Ontario, FedNor, Ontario Parks, Parks Canada, sub-regional DMOs and industry stakeholders.



## 2019-20 Board of Directors:

NAME	POSITION	SECTOR
Marty Kalagian	President	Operator - Retired
Gerry Webber	Vice President	Government - Retired
Betty McGie	Secretary-Treasurer	Watson's Algoma Vacations Ltd.
Ray Nadeau	Director	Victoria Inn
George Stivrins	Director	Georgian Bay Cruise Co.
Lori Branch	Director	Branch's Seine River Lodge
Tammy Frick	Director	Cinéfest
Dr. Rhonda Koster	Director	Lakehead University
Ian Wood	Director	City of Greater Sudbury

## Government Advisors:

NAME	POSITION	SECTOR
Laurie Brownlee	Advisor	Ministry of Tourism, Culture and Sport
Isabelle Denault	Advisor	Ministry of Northern Development and Mines
Lorrie Pella	Advisor	Destination Ontario
Nancy Rosset	Advisor	Industry Canada – FedNor
Shannon Lawr	Advisor	Ontario Parks
Michaela Campbell	Advisor	Parks Canada

## Destination Northern Ontario Staff:

NAME	POSITION
David MacLachlan	Executive Director
Pat Forrest	Senior Coordinator, Partnerships & Initiatives
Stephanie Hopkin	Senior Coordinator, Marketing & Communications
Nicki Schiewe	Senior Coordinator, Product Development
Kathy Carlson	Senior Coordinator, Corporate Services
Karen Peacock	Senior Coordinator, Training
Tiina Keranen	Visual Communications Designer
Gillian McCullough	Training Assistant
Karen Poirier	Office Administrator, Corporate Services

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

As such, this 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 the Executive Director from a staff perspective.

Furthermore, the Board will work together to develop a framework to monitor performance and progress towards Destination Northern Ontario's overall goals and objectives.

## Core Priority Pillars

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

PROGRAM PILLARS	DESTINATION NORTHERN ONTARIO OPERATIONAL AREAS / KEY PROGRAMS
<b>Product Development</b>	Product Development, Research
<b>Marketing &amp; Communications</b>	Marketing, Communications
<b>Workforce Development &amp; Training</b>	Workforce Development & Industry Training, Product Development ( <i>Quality Shift</i> ), Tourism Excellence North
<b>Investment Attraction / Investor Relations</b>	Investment Attraction
<b>Partnerships</b>	Partnership program
<b>Corporate Services &amp; Governance</b>	Governance, Organizational Excellence (Administration), Outreach

Photo: Lake Superior Provincial Park, Destination Northern Ontario

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

- Senior Coordinator, Corporate Services
- Senior Coordinator, Partnerships and Initiatives
- Senior Coordinator, Product Development
- Senior Coordinator, Workforce and Industry Training
- Senior Coordinator, Marketing and Communications

Destination Northern Ontario's Executive Director manages all Senior Coordinators and is tasked with ensuring initiatives under staff leadership are completed for each pillar area. Destination 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 Destination Northern Ontario office in Sault Ste. Marie. However, Senior Coordinators with office space in other locations will be required to act as representatives of Destination Northern Ontario for their respective community and sub-region. As such, it is expected that during the hiring process, Destination Northern Ontario ensures adequate representation from all three sub-regions. In keeping with Ministry of Tourism, Culture and Sport guidelines and Destination Northern Ontario's mission to establish a leadership role in the various program pillar initiatives, salaries are allocated to affiliated pillar areas.

## Performance & Reporting

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

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

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



## Governance & Administrative Priorities

### Objective

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

### Priority Action Area

Enhance organizational excellence with consistent adherence to policies and procedures and compliance with Provincial conflict of interest policies.

Key Activities	Q1	Q2	Q3	Q4
Review governance and operational policies.	●	●	●	●
Develop succession plan for Board and Staff.	●	●	●	●
Develop formalized risk management plan.	●	●	●	●
Develop a framework to monitor performance, progress and satisfaction with Destination Northern Ontario's overall goals and objectives.	●	●	●	●
Review and update rolling five-year strategic plan.		●	●	
Develop annualized business and operational plan for next fiscal period.		●	●	

### 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 Destination Northern Ontario's Vision and Mission.

### Priority Action Area

Continue to leverage MTCS allocation through partnerships with industry and provincial and federal funders.

### Performance Measures

- **5% increase** in industry stakeholders that have partnered and collaborated in Destination Northern Ontario activities.
- **75% of stakeholders** satisfied with Destination Northern Ontario activities.
- **80% board engagement** and **100% satisfaction** with progress in accomplishing strategic objectives. Engagement is measured through attendance and a year-end board survey.

**RTO 13****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 Destination Northern Ontario's research reveals 40% of the workforce in the region, as well as one in five businesses are tourism-related. In 2016, there were **8.7 million** visits to the north with tourism receipts totaling **\$1.6 billion**. Occupancy rates in RTO13 grew by 1.3% points year over year in 2017 while revenue jumped 5.5% points for the same year.

Photo: Chippewa River Falls - Destination Northern Ontario

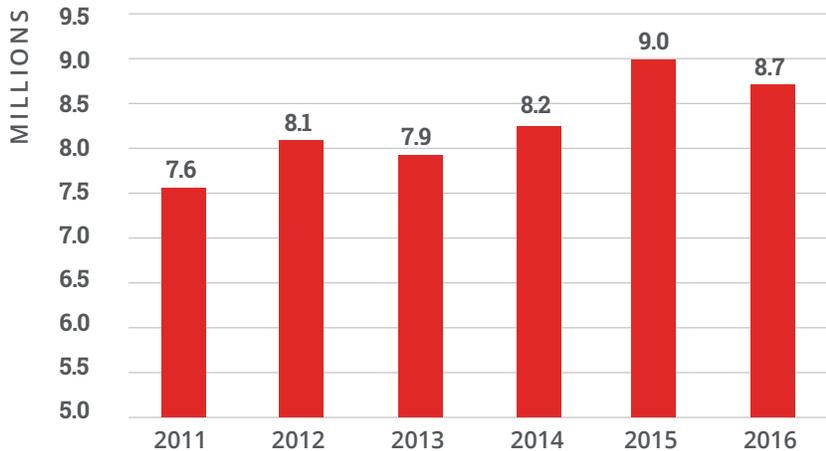
# 2016 TOURISM STATISTICS: REGION 13



**Region 13 Visitor Spending**  
2011-2016



**Region 13 Person Visits**  
2011-2016



**Sub-region 13A** accounted for the largest proportion of visits and spending in Region 13 while **Sub-region 13B** represented the least.

\* Statistics in RTO13 Regional Overview and Assessments are derived from a combination of Destination Northern Ontario research and the Ministry of Tourism, Culture and Sport Regional Profile statistics.

**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. Destination Northern Ontario undertook a research project to address the gap in data with CBRE.

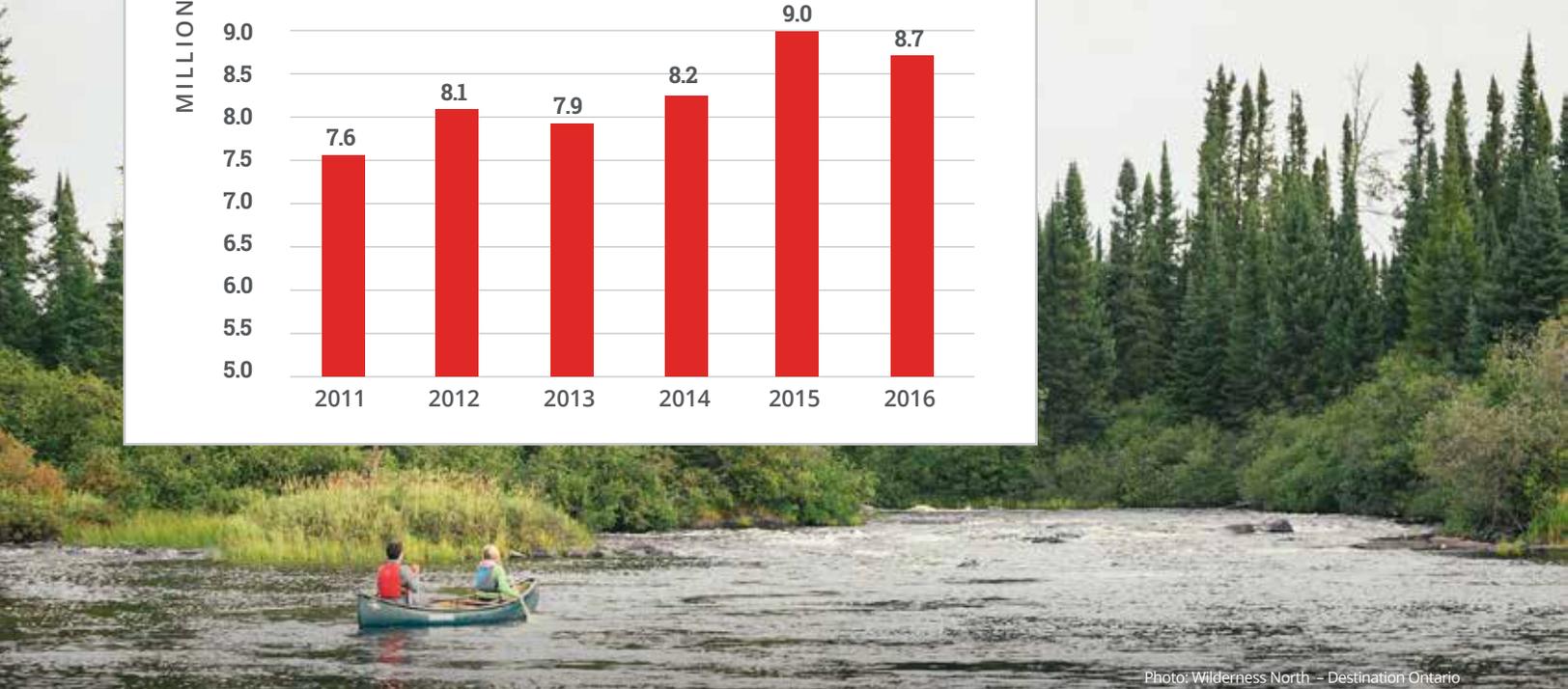


Photo: Wilderness North – Destination Ontario



### Fixed Roof Accommodation Performance Statistics (Urban)

LOCATION	OCCUPANCY PERCENTAGE			AVERAGE DAILY RATE			REVENUE PER AVAILABLE ROOM		
	2017	2016	Point Change	2017	2016	% Change	2017	2016	% Change
13a Northeastern Ontario	58.2%	56.9%	+1.3	\$112.88	\$112.47	+0.3%	\$65.79	\$64.03	+3.1%
13b Sault Ste. Marie-Algoma	56.9%	55.8%	+1.1	\$110.46	\$106.16	+4.1%	\$62.80	\$59.22	+6.0%
13c Northwest Ontario	70.3%	69.0%	+1.3	\$118.68	\$112.20	+5.8%	\$80.22	\$74.75	+7.3%
<b>RTO13 TOTAL</b>	61.8%	60.5%	+1.3	\$114.00	\$110.28	+3.4%	\$69.60	\$66.00	+5.5%



### Fixed Roof Accommodation Performance Statistics (Rural)

LOCATION	13A			13B			13C		
	2018	2017	% Change	2018	2017	% Change	2018	2017	% Change
Average Property Size (units)	15	14	4%	13	13	0%	9	9	0%
Average Operating Days	228	225	1%	180	181	0%	168	167	1%
Average Guests / Property	2,443	2,372	3%	1513	1515	0%	357	333	7%
Average Revenue / Guest	\$191	\$174	10%	\$191	\$185	3%	\$994	\$986	1%
Average Revenue / Property	\$468,000	\$412,000	14%	\$289,000	\$280,000	3%	\$355,000	\$328,000	8%

**Sub-region 13C** saw the highest average occupancy rate increases between 2017 and 2018.

**Sub-region 13B** experienced a total average daily rate increase of 3% and a 17% increase in revenue per guest in housing keeping cottage properties.

**Sub-region 13A** experienced modest growth in occupancy however experienced significant growth in revenue with a 14% growth in average revenue per property and 10% revenue per guest.



## **+** Positive Trends in the Marketplace

- 2018/19 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 approximately **2%** year over year (2017-2018) for fixed roof accommodations in RTO13.
- **Nature and outdoor activities, hunting and angling** continue to be the **top** reason for visiting RTO13.
- In 2017, RTO13 welcomed **8.2 million** visitors who spent **1.6 billion** dollars annually. Northern Ontario's tourism industry generates **half a billion** dollars in tax revenue each year.

## ANNUAL STATISTICS FOR NORTHERN ONTARIO



**8.2**  
MILLION  
VISITS



**\$1.6**  
BILLION  
TOURISM  
RECEIPTS



**\$500,000,000**  
GENERATED  
IN TAX REVENUE  
EACH YEAR

- **One** out of **every four** businesses in the north is tourism-related and **40%** of the workforce is connected to tourism.
- As a result of a study conducted by CBRE, it is estimated that visitor spending in 2015 and 2016 reached **\$1.6 billion**.
- Visitors spent an average of **\$185/trip**. Overnight visitors spent **2.5 times** as much per trip as same-day visitors.
- 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.
- **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

Destination Northern Ontario has 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** (2014)
- **Snowmobile Touring** (2014)
- **Nature and Outdoors** (2015)
- **Visiting Friends and Relatives (VFR) tourists** (2015)
- **Major Urban Centre tourists** (2015)
- **Overview of other tourism-related opportunities** (2015)
- **Rural Accommodation Occupancy Study** (2017/2018)
- **Lake Superior Watershed Research** (2018)
- **North Shore of Lake Superior Accommodations Study** (2018)

Destination Northern Ontario used this body of research to develop several strategies that align with priority pillars. These strategies have guided Destination 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
- **2017-18** Sector-Specific Tourism Plans (Angling, Auto and RV Touring, Cycling, Francophone, Gateways and Destination Communities, Nature and Adventure, Snowmobiling)
- **2017** Travel Information Strategy

Photos: Destination Ontario



## Challenges in Achieving Strategic Goals

In its 2012 – 2017 **Tourism Marketing Strategy**, Destination 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.
- 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.
- 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.
- A consistently low Canadian dollar coupled with new leadership in the United States has helped to increase the attractiveness of Northern Ontario as a destination for U.S. visitors.

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.

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>U.S.A.</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 U.S.A.	**	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%**).

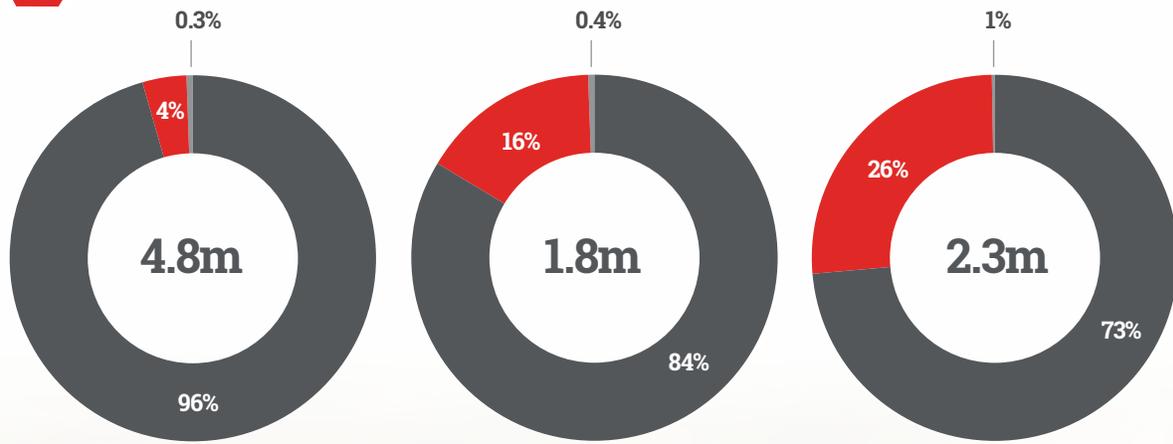
American motorcycling tourists also account for a large segment of touring overnight visitors (**40%**).

## Sub-Regional Market Shares

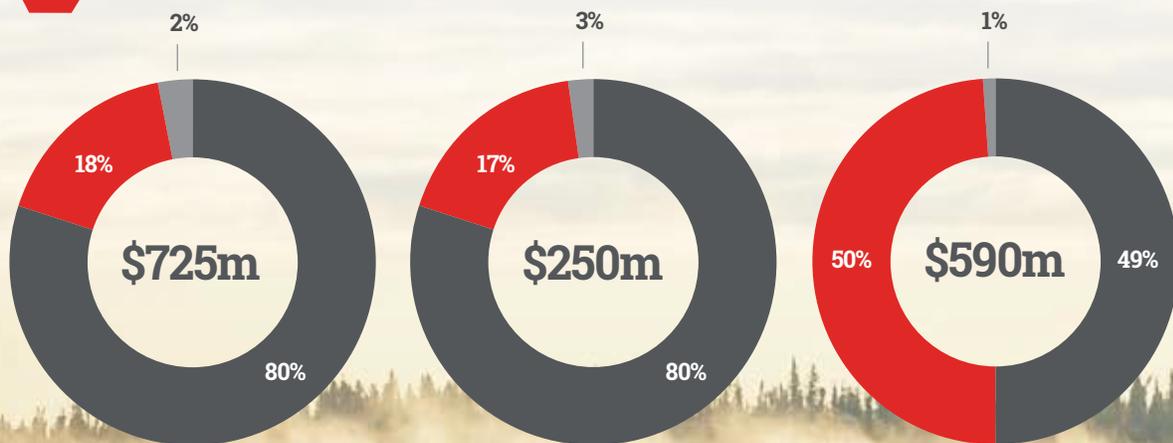
The North's sub-regions attract tourists in each segment at different rates in part depending on their proximity to the U.S., available product and highway access to large population centres such as Toronto, Ottawa and Winnipeg.



### Northern Ontario's Sub-Region Visitor Origins



### Visitor Spending Origins by Sub-Region



■ CANADA ■ U.S.\* ■ OVERSEAS

Source: Ministry of Tourism, Culture and Sport \*2016 U.S. Data for Region 13 Estimated by CBRE

## 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 similarly replicated in areas of Ontario that are easier to reach 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.).



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. Rental costs and liability insurance have posed challenges for this product as well.



**PRODUCT  
DEVELOPMENT**

**Product Development**

Photo: Thunder Bay, 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, Destination 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 Destination Northern Ontario's Product Teams and manage all related Research and Product Development activities.

Destination 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. Destination 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 Coordinator, Partnerships and Initiatives.

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 and Outputs	Q1	Q2	Q3	Q4
Senior Product Development Coordinator to manage and implement 100% of planned product development initiatives.	●	●	●	●
Senior Partnership Coordinator to manage and implement 100% of planned wayfinding initiatives.	●	●	●	●
Update Destination Northern Ontario's tourism product development strategy.	●	●	●	●

### Priority Action Area

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

Key Activities and Outputs	Q1	Q2	Q3	Q4
Research potential impact of the municipal accommodation tax.	●	●	●	●
Continue to update and enhance Destination Northern Ontario Operator Database (inventory) by sub-region.	●	●	●	●
Continue annual Accommodation Performance Tracking by sub-region.	●	●	●	●
Subscribe to 12 monthly hotel/motel performance reports and one annual synopsis.	●	●	●	●



## Product Development

### Priority Action Area

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

### Key Activities and Outputs

	Q1	Q2	Q3	Q4
Manage existing 12 product teams (angling, culture and heritage [Group of Seven and Francophone], gateway and destination communities, nature and adventure, auto and RV touring, snowmobiling, cycling, international markets, motorcycling, boating, and wayfinding) to review and steer sector plans and execute specific initiatives by product priorities through a minimum of 4 quarterly meetings per team (48 total).	●	●	●	●
Undertake and develop an Indigenous Tourism Plan that coordinates with activities and priorities of Indigenous Tourism Ontario.	●	●	●	●
Execute major product development initiatives in the following areas:				
<b>Angling and Hunting</b> – Execute Experience Fishing Program.	●	●	●	●
<b>Culture and Heritage</b> – Execute Francophone tourism initiative.	●	●	●	●
<b>Gateway and Destination Community</b> – Work with destination partners to further develop shore excursion and other opportunities that support Great Lakes cruising and work with partners to execute Great Lakes Waterfront Trails Adventure and International Ploughing Match events.	●	●	●	●
<b>Nature and Adventure</b> – Develop Nature and Adventure wildlife viewing experience(s).	●	●	●	●
<b>Touring</b> – Execute Lake Superior Auto/RV Touring Plan and World’s Best Snowmobile Destination Plan.	●	●	●	●

Execute Product Development Symposium in conjunction with Northern Ontario Tourism Summit for 100 participants.

● ●



## Product Development

### Priority Action Area

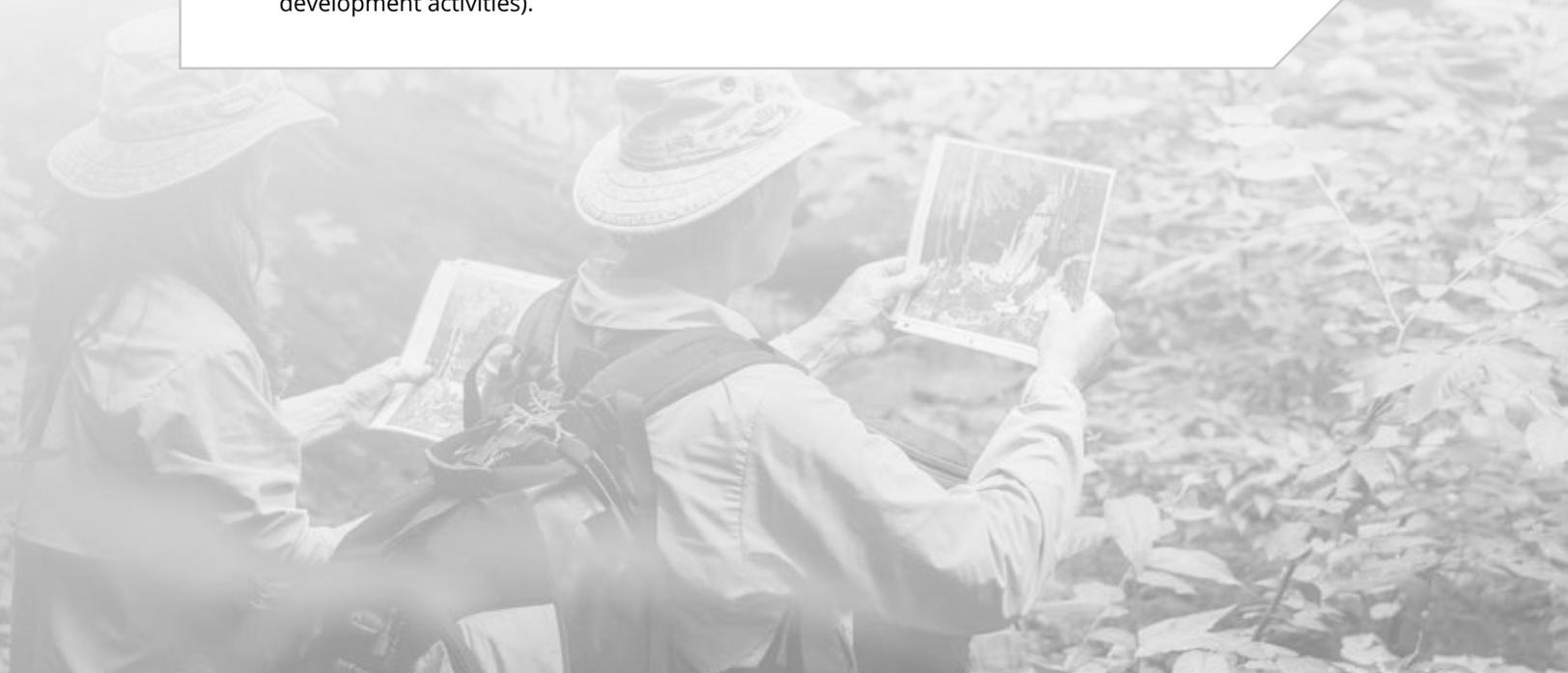
Continue to support Northern Ontario Travel Information Centres (TICs) as key touchpoints in the wayfinding continuum with training, staffing, communications tools and resources to track outcomes and gather data.

### Key Activities and Outputs

	Q1	Q2	Q3	Q4
Provide tools to 15 TICs to track visitor numbers and complete minimum 3000 visitor surveys.	●	●	●	●
Provide customer service online training to 45 TIC travel counsellors, extend SEP for two weeks for 25 students, and coordinate brochure placement at 15 TICs.		●	●	
Maintain partnership with current 8 signed TICs for directional signage and improve gateway signage for an additional 3 TICs.	●	●	●	●

### Performance Measures

- **Change** in the number of new products and experiences and/or the number of existing products and experiences enhanced, in market with a total of 7 new or enhanced products or experiences.
- **Maintain** the number of stakeholders participating in product development activities, achieve 100% product team satisfaction and overall 75% industry satisfaction.
- **Percentage** of initiatives completed compared to target (100% of planned product development activities).



# Investment Attraction

**INVESTMENT  
ATTRACTION**

Photo: Fort William Historical Park, Destination Ontario

# Investment Attraction

## Objective

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

Under the leadership of the Executive Director, Destination 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 Destination 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 Destination 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 Destination Northern Ontario's role as a resource to Northern Ontario's investment community.

### Key Activities and Outputs

Continue to enhance Destination Northern Ontario website by reviewing and updating existing inventory of investment attraction resources.

Q1 Q2 Q3 Q4

● ● ● ●

Invite partners and advisors to discuss relevant investment-related topics at four Destination Northern Ontario Board face-to-face meetings.

● ● ● ●

Communicate findings relative to Northern Ontario's investment to industry.

● ● ● ●

In partnership with NOTO develop a digital and print collateral piece as a resource to TEN training participants.

●



## Investment Attraction

### Priority Action Area

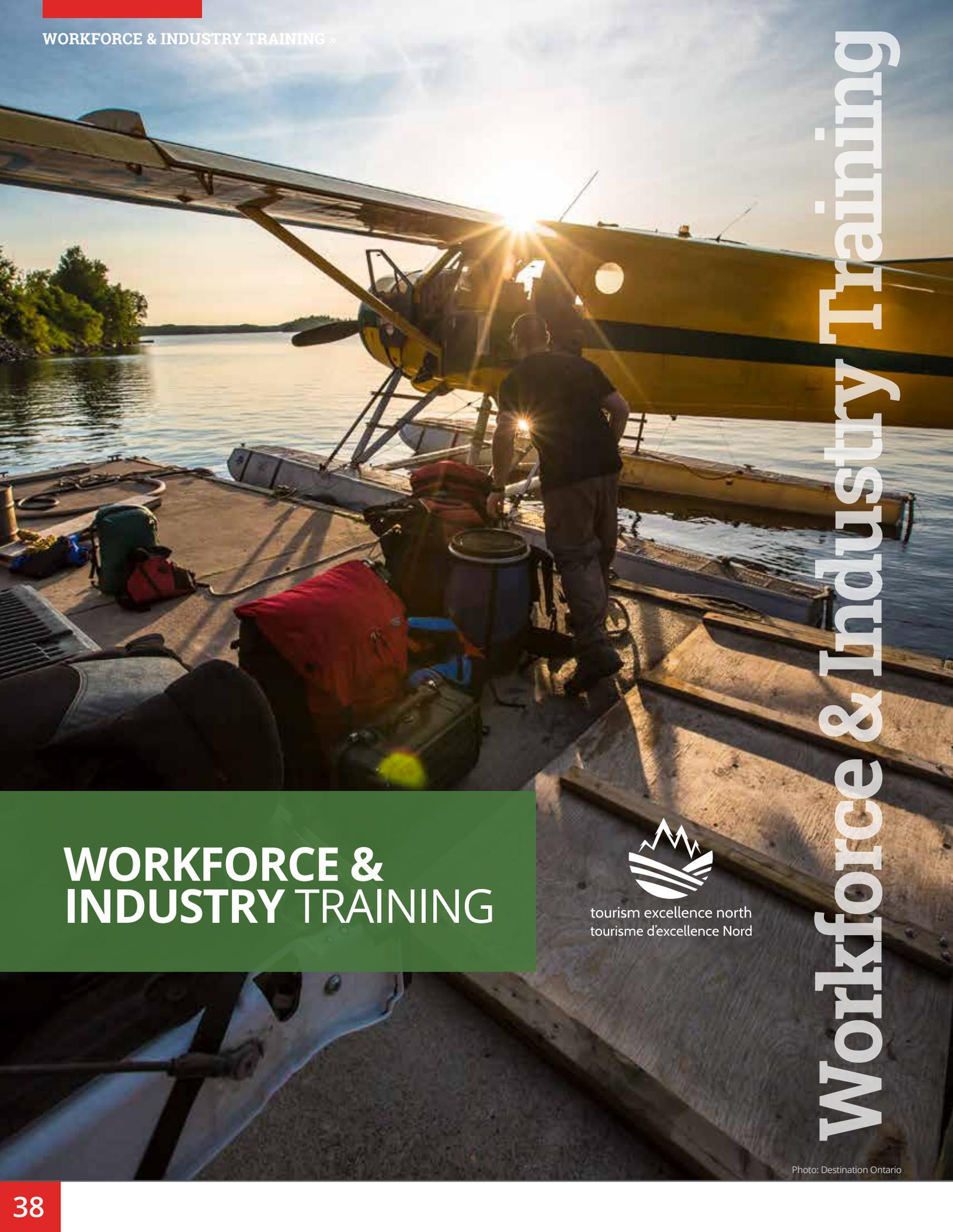
Provide support for investment into Northern Ontario products and experiences.

### Key Activities and Outputs

	Q1	Q2	Q3	Q4
Partnering with Northern Ontario's CFDCs and Fednor provide support to facilitate succession planning across Northern Ontario with 6 operators admitted to the program.	●	●	●	●
Provide grant writing assistance to Northern Ontario not for profit tourism sector with four applications submitted.	●	●	●	●
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).	●	●	●	●
Working with the Ontario Tourism Innovation Lab and building on a successful pilot in Windsor-Essex work with community and 20 industry partners to implement a pilot program in the Timmins catchment area culminating at the Northern Ontario Tourism Summit.	●	●		
Update and maintain list of tourism investment funding resources at the Provincial and Federal level.	●	●		

### Performance Measures

- **100% completion** of minimum of 6 outreach activities made to community and economic development organizations.
- **50 stakeholders** participating in investment attraction activities and 100% satisfaction with progress. Overall 75% industry stakeholder satisfaction.
- **Percentage of initiatives** completed compared to target with 100% of planned investment attraction activities completed.



# WORKFORCE & INDUSTRY TRAINING



tourism excellence north  
tourisme d'excellence Nord

# Workforce & Industry Training

Photo: 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.

Destination 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 Destination 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. In line with the original program plan for Tourism Excellence North (Tourism Excellence North: A Tourism Development Program for Northern Ontario, March 2015), the three-year pilot was completed in 2018. To consolidate Industry Training and Workforce Development efforts undertaken by the organization with the Tourism Excellence North

program, Destination 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 Destination Northern Ontario initiatives (i.e., training for accommodation performance monitoring, wayfinding at Travel Information Centers, etc.); and leveraging funding in support of Destination 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 and Outputs	Q1	Q2	Q3	Q4
Workforce and Industry Training initiatives managed by Senior Training Coordinator with support from Training Assistant to implement 100% of 8 identified initiatives per Destination Northern Ontario's training plan.	●	●	●	●
Develop and execute training to DNO staff that will enable staff to deliver TEN and other training reducing the dependency on outside professional services.	●	●		
DNO training staff to expand training delivery to include on-line learning modules.	●	●	●	●

### Priority Action Area

Continue to offer training under the Tourism Excellence North brand to further implement a "quality shift" across Northern Ontario, enhancing and developing new tourism products and experiences for businesses, communities and destinations.

Key Activities and Outputs	Q1	Q2	Q3	Q4
Deliver Fast Track to Success personalized coaching to a minimum of 20 industry partners.	●	●	●	●
Facilitate one Best Practices Mission to 12 participants.	●	●	●	●
Deliver minimum of one Experiential Travel Training for Operators Workshop to 12 participants.	●	●	●	●
Deliver minimum of one Moving Tourism in Your Community from Ideas to Action Workshop to 12 participants.	●	●	●	●



## Workforce & Industry Training

### Priority Action Area

Continue to offer and develop specific training under the Tourism Excellence North brand to further implement an “experience shift” across Northern Ontario, enhancing and developing new tourism products and experiences for identified priority sectors to businesses, communities and destinations.

### Key Activities and Outputs

	Q1	Q2	Q3	Q4
Enhance Fast Track to Success coaching tool to include elements that are relevant to twelve priority sectors.	●	●	●	●
Deliver minimum of 6 training workshops to operators, destinations and communities (international markets, Experience Fishing, World’s Best Snowmobiling, green tourism, fishing, hunting and interpretive guides).	●	●	●	●
Deliver online self-assessment tools to operators, communities and destinations specific to priority sectors (200 participants).	●	●	●	●
Deliver 12 sector training opportunities to 300 participants at Northern Ontario Tourism Summit.			●	

### Performance Measures

- **75% of stakeholders** reporting business/customer improvements as a result of Destination Northern Ontario training activities.
- **An increase of 10%** in stakeholders participating and 100% of stakeholders showing satisfaction with Destination Northern Ontario training activities.
- **100%** of initiatives completed compared to target.





# Marketing

MARKETING

Photo: Sall Superior, Destination Ontario

# 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 Destination Northern Ontario is Destination Northern Ontario's direction to take a more strategic leadership role in guiding Marketing and Communications for the industry. Destination 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 Destination Northern Ontario's public image in a professional and favourable light.

The Senior Marketing and Communications Coordinator will ensure all corporate communications continues to focus on distinct messaging for three audiences: government representatives, economic development professionals, and operators/destination communities. By identifying these three

communication streams, Destination 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 Destination Northern Ontario in order to ensure a coordinated and consistent approach to marketing in Northern Ontario. With this document at its base, Destination Northern Ontario has created and is currently implementing a three-year marketing action plan. Destination Northern Ontario will look to consult with industry and provincial partners in the 2018-19 fiscal year, as the action plan will come to an end in 2020.

In addition to regular marketing activities, Destination Northern Ontario will be taking a significant role in Rencouvus-Canada in 2019. The event takes place in Toronto, Ontario in 2019 providing a significant opportunity for the region to showcase product offerings to the international travel market. The 2019-20 budget reflects the investment to RVC 2019 including media familiarization tours, host a Northern Ontario lunch and activation space on the show floor.

Building on the Northern Ontario Tourism strategic direction document, Destination 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. In addition to supporting the marketing of priority products and experiences, Destination Northern Ontario will continue to invest in tools and resources that help pan-northern and sub-regional marketing efforts.

From a tactical perspective, Destination 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

### 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 and Outputs

100% of 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 and Industry Communications Coordinator (NOHFC Internship).

Q1 Q2 Q3 Q4

● ● ● ●

Revisit the 2017-20 Strategic Direction for Marketing Tourism in Northern Ontario to develop in partnership with Destination Ontario a new 3-5 year tourism marketing strategy.

● ● ● ●



## Marketing

### Priority Action Area

Increase effectiveness of marketing efforts through the development and provision of customized performance and packaging tools to support Northern tourism industry.

#### Key Activities and Outputs

	Q1	Q2	Q3	Q4
Senior Coordinator, Marketing and Communications to monitor performance and reporting through an online marketing reporting tool.	●	●	●	●
Continue to provide operators with e-commerce solutions (reservation system(s)) that allow easy and accessible path-to-purchase options for consumers.	●	●	●	●
Continue the operation of NorthernOntario.travel by enhancing the current site for growth, new priority experiences and higher traffic rates.	●	●	●	●
Continue to share and develop digital assets with Destination Ontario to grow collective library (2 hours of additional video assets and 400 photo stills).	●	●	●	●
Develop and maintain Trip Planner in partnership with Destination Ontario incorporating Destination Northern Ontario's database.	●	●	●	●

### 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 and Outputs

	Q1	Q2	Q3	Q4
Continue to lead overseas, trans border and domestic travel trade and group tour initiatives working with Destination Ontario to participate in Rendezvous Canada, two sales missions and four fam tours.	●	●	●	●
Work with sub-regional leads to enhance current or create future marketing tools and assets that align with the provincial brand architecture.	●	●	●	●
Continue centralization of all media familiarization tours, in partnership with Destination Ontario, to maximize ROI and provide equal opportunity.	●	●	●	●

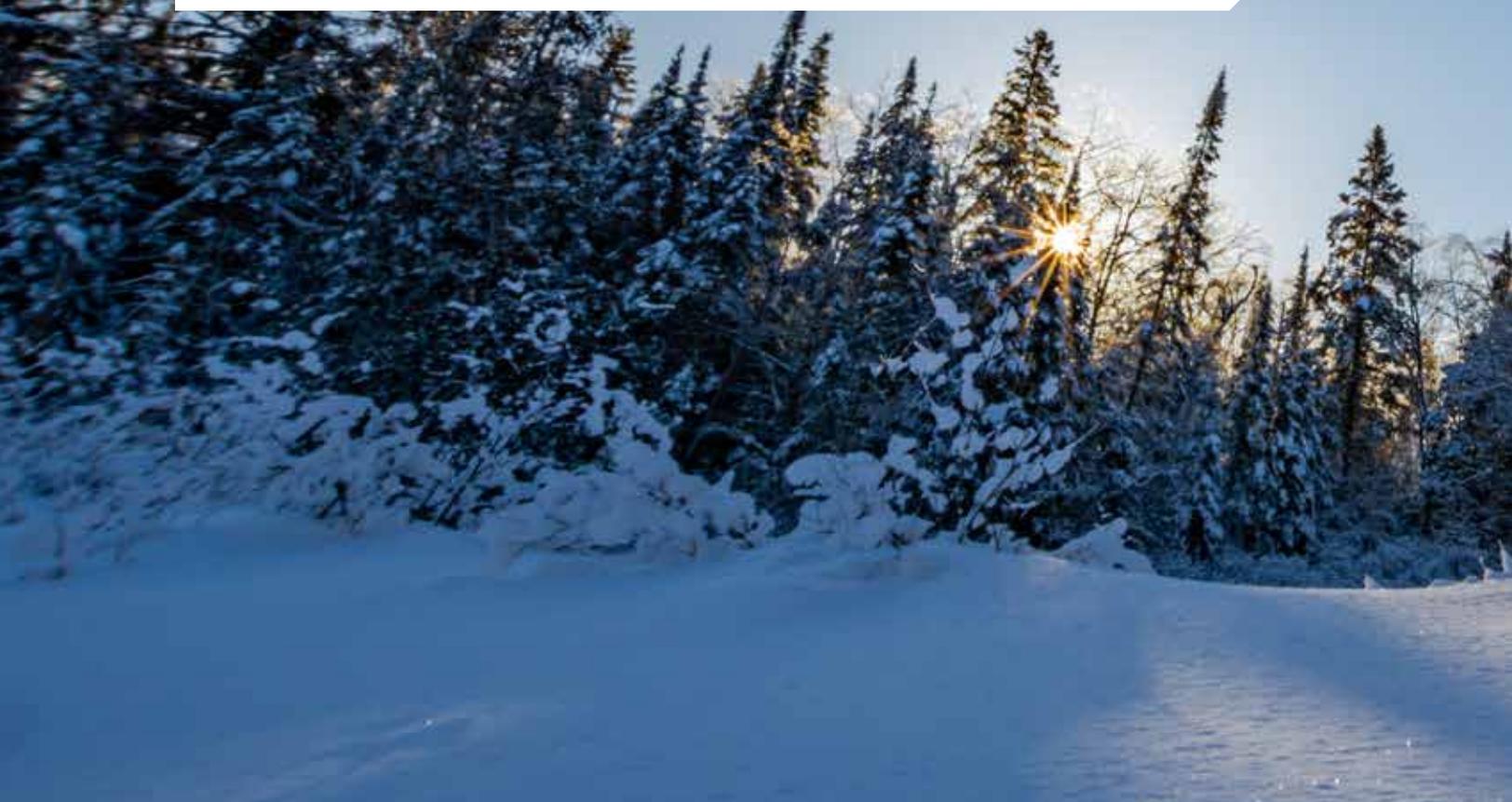


## Marketing

### Priority Action Area

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

Key Activities and Outputs	Q1	Q2	Q3	Q4
Continue to acquire and maintain existing content for NorthernOntario.travel through sub-regional leads directly resulting in a minimum of 880,000 visits, cost per click of .50 cents, and 100 new stories uploaded to the portal.	●	●	●	●
Work with rural sub-regional leads to develop and implement a multi-media tactical marketing plan that promotes relative priority products and experiences (angling and hunting, touring, nature and adventure, culture and heritage).	●	●	●	●
Work with Urban Destination Marketing Organizations who are collecting the Mandatory Accommodation Tax by partnering on multi-media marketing initiatives that promote gateway and destination community products and experiences. This will supplement a partnership initiative (see page 50).	●	●	●	●





## Marketing

### Priority Action Area

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

### Key Activities and Outputs

	Q1	Q2	Q3	Q4
Communicate relevant Destination Northern Ontario program information to Northern Ontario tourism industry (i.e. training, marketing, etc.) through social media, traditional media outlets and industry events/outreach initiatives.	●	●	●	●
Ensure consistent usage of organizational and ministry styles, logos, etc.	●	●	●	●
Continue to update website data and directories regularly.	●	●	●	●
Continue to grow Northern Ontario Tourism Summit and assess satisfaction.		●		
Undertake industry awareness and satisfaction surveys.				●
Continue to enhance Destination Northern Ontario's Communication Plan, 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 through working with indigenous/francophone tourism organizations and developing marketing content for indigenous and francophone experiences.	●	●	●	●
Develop and maintain library of operator success stories in relation to their experience with Destination Northern Ontario.	●	●	●	●

### Performance Measures

- **10% increase** in operators offering packages online (rural).
- **Increase** in web traffic (NorthernOntario.Travel) by 15% year over year and increase in click-through rates (NorthernOntario.Travel) to partner websites by 15% year over year.
- **75% stakeholder satisfaction** for DNO marketing activities.
- **100%** of initiatives completed compared to target.

PARTNERSHIPS

Partnerships

Photo: Woodland Caribou Provincial Park - Destination Ontario

# Partnerships

## Objective

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

Destination Northern Ontario's partnership program is extremely successful each year. An average of 70 tourism businesses and organizations are recruited as partners annually to leverage the partnership fund by nearly 500%. The primary objective for the partnership program is to continue to build long-term relationships and focus on all pillar areas while ensuring that Destination Northern Ontario's reach is extended beyond traditional partners on an annual basis.

Building a plan for leveraging funding annually, integrating in-depth tracking in line with other Destination Northern Ontario pillar objectives and targeting an increase in leveraged funding of 5% per annum are important components to ensure the continued success of the partnership program.

The following charts identify both the priority action areas and the key activities to guide partnership 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 Destination Northern Ontario leveraging the MTCS investment.

### Key Activities and Outputs

Undertake ongoing outreach to identify new partners and work with existing partners as required on partnerships that lead to enhanced product development and workforce and industry training in alignment with Destination Northern Ontario priority pillars, as well as on marketing partnerships.

100% initiatives Managed by Senior Coordinator, Partnerships and Initiatives or Senior Marketing Coordinator.

	Q1	Q2	Q3	Q4
Undertake ongoing outreach to identify new partners and work with existing partners as required on partnerships that lead to enhanced product development and workforce and industry training in alignment with Destination Northern Ontario priority pillars, as well as on marketing partnerships.	●	●	●	●
100% initiatives Managed by Senior Coordinator, Partnerships and Initiatives or Senior Marketing Coordinator.	●	●	●	●



## Partnerships

### Priority Action Area

Work with existing and new partners to plan and implement collaborative marketing partnerships that align with the provincial brand architecture and leverage the MTCS investment.

### Key Activities and Outputs

	Q1	Q2	Q3	Q4
<b>PROJECT #1 – TOURISM AWARENESS:</b> Review last year’s program, identify partners and develop a multi-media campaign that highlights the vital importance of tourism to the Northern Ontario economy utilizing social and digital media, print, television and radio for this fiscal year and monitor performance.	●	●	●	●
<b>PROJECT #2 – STAY2PLAY:</b> Working with CTV Northern Ontario, Destination Ontario, destination marketing organizations and 20 industry operators, in alignment with the provincial brand architecture develop and implement spring, summer, fall and winter campaigns to promote travel within Northern Ontario.	●	●	●	●
<b>PROJECT #3: ONTARIO EXPERIENCE TV:</b> In partnership with Destination Ontario, rural DMOs and industry operators, work with Lindner Media to develop 13 episodes for season three of “The Ontario Experience” television show for U.S. networks beginning January 2020. Each show will be aired on U.S. networks a minimum of 3 times and there will be a supporting multi-media campaign including social and digital media to drive show ratings.	●	●	●	●
<b>PROJECT #4 – COOP MARKETING:</b> Work with up to 10 Tourism Excellence North participants to develop partnered marketing initiatives that align with marketing priorities as a result of successful completion of a Fast Track to Success mentorship.			●	●
<b>PROJECT #5: RENDEZ-VOUS CANADA:</b> Work with 6 DMO partners in Northern Ontario to establish a meaningful presence at Rendezvous-Canada in Toronto in May 2019 under the provincial brand architecture.	●	●		
<b>PROJECT #6: COMMUNITY AND DESTINATION COMMUNITIES:</b> Work with Urban Destination Marketing Organizations who are collecting the Mandatory Accommodation Tax by partnering on multi-media marketing initiatives that promote gateway and destination community products and experiences. This will be supplemented by \$100,000 from the marketing pillar ( <b>see page 47</b> ).	●	●	●	●



## Partnerships

### Priority Action Area

Work with community, destination, First Nation and other partners to develop and implement collaborative product development initiatives.

### Key Activities and Outputs

#### PROJECT #7 - BILINGUAL COMMUNITY WAYFINDING SIGNAGE:

Continue to work with FedNor and community partners to plan, fabricate and install bilingual community wayfinding signage utilizing Destination Northern Ontario's wayfinding toolkit. This is the final year of a 3-year partnership with FedNor whereby 2/3rds funding is provided to partners. Partners for this fiscal will include but not be limited to Sault Ste. Marie, Temiskaming Shores, Terrace Bay, Thessalon, Kenora and the Municipality of Greenstone and North Bay.

Q1 Q2 Q3 Q4

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**PROJECT #8 - TRAIL WAYFINDING:** Work with Northern Ontario trails partners to develop and implement tourism trail wayfinding strategies that include signage, print and digital to improve wayfinding and support connections to tourism experiences and services. Partners identified to date include but are not limited to Path of the Paddle and Casque Isles Trails.

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**PROJECT #9 - STRATEGIC PLANNING and IMPLEMENTATION:** Work with tourism destination partners, not-for-profits, First Nations and municipalities including those that require plans to implement the MAT tax to develop and/or implement strategic plans that support Destination Northern Ontario's priority sectors and/or pillars. Partners identified include but are not limited to Indigenous Tourism Ontario, the Lake Superior River Surfing Association and communities and First Nations along Lake Superior's North Shore.

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### Priority Action Area

Leveraging the MTCS investment, work with industry training partners to plan and deliver workforce development and training initiatives at the Northern Ontario Tourism Summit.

### Key Activities and Outputs

**PROJECT #10 - NORTHERN ONTARIO TOURISM SUMMIT:** Plan and deliver minimum of 12 industry training activities, that support Destination Northern Ontario priorities, to 300 delegates at the 2019 Northern Ontario Tourism Summit.

Q1 Q2 Q3 Q4

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### Performance Measures

- **Maintain** a minimum of 75 individual partners with 100% satisfaction in partnership activities.
- **Nine** projects completed (100% of planned partnership initiatives).
- **Leverage \$3** for every \$1 partnership allocation (matching, non-matching and in-kind contributions).
- **Minimum 50%** MTCS partnership allocation going to non-marketing partnerships.

**RISK  
MANAGEMENT**

**Risk Management**

Photo: Barrett River, Trans Canada Highway

Destination Northern Ontario's Board of Directors are committed to ensuring that they uphold a high level of professionalism and integrity with a "zero tolerance" policy for any perceived or actual conflict of interest.

In addition, financial audits are conducted annually, ensuring that funds are used appropriately and according to the terms of the Transfer Payment Agreement with Her Majesty.

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

Where delivering on aspects of this plan is done through service agreements, the Destination Northern Ontario Board will support the Executive Director in terms of monitoring progress, reviewing performance and taking remedial action as required.

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

**FINANCIAL  
PLAN**

**Financial Plan**

# Financial Plan

Destination 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.

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

## Destination Northern Ontario Ministry of Tourism, Culture and Sport Budget Allocation April 1, 2018 to March 31, 2019



### Governance & Administration

Salaries and Benefits	\$	225,235.00
Governance	\$	25,000.00
Overhead/Facilities	\$	65,000.00
Finance & Administration	\$	70,000.00
Travel	\$	20,000.00
Industry Relations	\$	5,000.00
Information Technology	\$	5,000.00
<b>Subtotal</b>	<b>\$</b>	<b>415,235.00</b>



## Product Development

<b>Salaries, Benefits and Coordination</b>	\$ 150,000.00
	<b>\$ 150,000.00</b>
<b>Research</b>	
Municipal Accommodation Tax	\$ 30,000.00
Urban Hotel Performance	\$ 6,000.00
Accommodation Performance by Sub-region	\$ 9,000.00
	<b>\$ 45,000.00</b>
<b>Experience Shift</b>	
Angling	\$ 25,000.00
Francophone	\$ 15,000.00
Gateway Destination Communities	\$ 40,000.00
International	\$ 10,000.00
Touring	\$ 50,000.00
	<b>\$ 140,000.00</b>
<b>Wayfinding</b>	
TIC Data Collection	\$ 20,000.00
TIC Training & Coordination	\$ 50,000.00
TIC Signage	\$ 25,000.00
	<b>\$ 95,000.00</b>
<b>Subtotal</b>	<b>\$ 430,000.00</b>



## Investment Attraction

<b>Resource</b>	\$ 10,000.00
<b>Support</b>	\$ 15,000.00
<b>Subtotal</b>	<b>\$ 25,000.00</b>



## Workforce Development & Training

Salaries & Benefits and Coordination	\$	150,000.00
Quality Shift Training	\$	120,000.00
Experience Shift Training	\$	75,000.00
<b>Subtotal</b>	<b>\$</b>	<b>345,000.00</b>



## Marketing

Salaries, Benefits and Coordination	\$	160,000.00
	<b>\$</b>	<b>160,000.00</b>
<b>Marketing Tools</b>		
Digital Asset Acquisition	\$	10,000.00
e-Commerce Solutions	\$	50,000.00
NorthernOntario.travel	\$	200,000.00
Trip Planner	\$	25,000.00
	<b>\$</b>	<b>285,000.00</b>
<b>Northern Ontario Marketing</b>		
Rendez-Vous Canada	\$	250,000.00
Overseas Sales Missions	\$	50,000.00
Travel Trade FAMs	\$	50,000.00
	<b>\$</b>	<b>350,000.00</b>
<b>Sub-Regional Marketing</b>		
Brand Alignment	\$	50,000.00
Content Acquisition & Management	\$	230,000.00
Angling & Hunting	\$	525,000.00
Culture & Heritage	\$	70,000.00
Gateway Destination Communities	\$	100,000.00
Nature & Adventure	\$	100,000.00
Touring	\$	140,000.00
	<b>\$</b>	<b>1,215,000.00</b>
<b>Communications &amp; Stakeholder Engagement</b>	\$	100,000.00
	<b>\$</b>	<b>100,000.00</b>
<b>Subtotal</b>	<b>\$</b>	<b>2,110,000.00</b>



## Partnership

### Marketing

Tourism Awareness	\$	25,000.00
CTV Stay2Play	\$	75,000.00
Ontario Experience TV	\$	75,000.00
Operator Partners (Co-Op)	\$	25,000.00
Destination Partners (RVC)	\$	50,000.00
Gateways & Destination Communities	\$	100,000.00
	<b>\$</b>	<b>350,000.00</b>

### Product Development

Trails Wayfinding	\$	25,000.00
Community Wayfinding	\$	155,000.00
Strategic Planning	\$	70,000.00
	<b>\$</b>	<b>250,000.00</b>

### Workforce & Industry Training

Northern Ontario Tourism Summit	\$	5,000.00
	<b>\$</b>	<b>5,000.00</b>

**Subtotal \$ 605,000.00**

**GRAND TOTAL \$ 3,930,235.00**

## 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>TSRC</b>	Travel Survey of Residents Canada
<b>VFR</b>	Visiting Friends & Relatives



DESTINATION  
**NORTHERN  
ONTARIO**

Photo: Old Woman Bay, Lake Superior – Destination Ontario



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