

DESTINATION ONTARIO

An Agency of the Government of Ontario

BUSINESS PLAN

2022-2023

DESTINATION ONTARIO BUSINESS PLAN 2022-2023

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EXECUTIVE SUMMARY

Destination Ontario's Business Plan for 2022-23 reflects the continued delivery of strategic marketing programs and activities to support the tourism industry's recovery from COVID-19. While some travel resumed in 2021, it will be important at this juncture to capitalize on consumer pent up demand within Ontario, Canada, and outside Canada in the United States (U.S.) and international key source markets. Destination Ontario recognizes that the COVID-19 pandemic remains a fluid situation and the agency will continue to monitor any impacts to travel and adjust marketing activities as needed.

Destination Ontario will work closely with the Ministry of Heritage, Sport, Tourism and Culture Industries (Ministry) to support Ministry priorities and align efforts, including those outlined in the white paper – *Reconnecting Ontarians: Re-emerging as a Global Leader*, as well as recommendations from the Tourism Economic Recovery Ministerial Task Force. The agency will also collaborate with Ministry sister agencies to bridge the synergies of the Ministry further.

Destination Ontario's *Roadmap to Recovery* will guide the agency's marketing strategies to support increased visitation and generate expenditures for tourism businesses across the province. Destination Ontario recognizes that pre-COVID-19 visitation and spending levels may take some time to return. The agency is prepared to strategically invest, as budgets allow, in key markets that will generate the strongest return on investment.

Collaboration with stakeholders will help to deliver more effective and efficient marketing programs and activities. Wherever possible, Destination Ontario will work with the industry's stakeholders, including Regional Tourism Organizations (RTO), Destination Marketing Organizations (DMO), sector associations, tourism businesses and sister agencies to further the reach of Ontario's tourism offerings.

As the lead provincial marketing organization for the province, Destination Ontario recognizes the value and importance of its work. The focus of the agency will be guided on delivering strong results for Ontario's tourism industry.

MANDATE

Destination Ontario, legally named the Ontario Tourism Marketing Partnership Corporation (OTMPC), is governed by Ontario Regulation 618/98 made under the *Development Corporations Act*. Its mandate, as provided for in the regulation, is:

- (a) to market Ontario as a travel destination;
- (b) to undertake joint marketing initiatives with the tourism industry;
- (c) to support and assist the marketing efforts of the tourism industry; and
- (d) in cooperation with the tourism industry, the Government of Ontario, other governments and other agencies of governments, to promote Ontario as a travel destination.

The following principles support the mandate:

- (a) Destination Ontario is to lead the marketing of Ontario as a travel destination nationally and internationally;
- (b) Destination Ontario and regional organizations are to work together to market travel within Ontario;
- (c) Destination Ontario is to deliver marketing services that contribute to regional and economic development;
- (d) Destination Ontario is to become a centre of excellence supporting provincial marketing; and
- (e) Destination Ontario is to engage in partnerships to support the above objectives.

Vision

To position Ontario as a preferred global destination.

Mission

To generate increased visitation by Ontario, Canadian and international tourists, enhance tourism expenditures in Ontario, and contribute to provincial economic prosperity through impactful marketing and results-oriented investment partnerships.

ENVIRONMENTAL SCAN

The COVID-19 pandemic has had a massive impact on Ontario, Canada, and the world. With global vaccine rollouts in 2021, the global economy is expected to achieve strong growth in 2022 but tourism recovery is tied to high vaccine participation. Global travel re-opening will be asymmetric as each country will have different policies and timing to re-opening to travellers with demonstrated immunity against COVID-19. The Ontario government's guidelines continue to outline protocols for health and safety and how to support the economy. Destination Ontario's activities and plans will continue to be informed by the latest evolving data and trends.

The following points highlight the current environment.

Tourism Forecasted Outcomes¹

- In June 2021, Destination Canada outlined three forecasted recovery scenarios:
 - Ideal Travel Conditions: Revenue in 2021 forecasted to be \$55B with expectation of recovery to 2019 levels by 2023
 - Current Travel Conditions: Revenue in 2021 forecasted to be \$51.1B with expectation of recovery to 2019 levels by 2025
 - Poor Travel Conditions: Revenue in 2021 forecasted to be \$46B with expectation of recovery to 2019 levels after 2026
- As of June 2021, Destination Canada has forecasted Canadian tourism spending to recover faster than international tourism into Canada:
 - Based on current travel conditions, the total tourism spend in Canada is forecasted to be \$105.2B in 2025.

U.S. Travel Outlook²

According to Destination Analysts' U.S. Coronavirus Travel Index Report Key Findings results ending October 19, 2021, Americans' concerns about travel have greatly decreased since the start of the pandemic in 2020:

- 66% of Americans are inclined to learn about new, exciting, travel experiences or destinations to visit
- 22% feel very confident when travelling during their current trips
- 59% Americans would be unlikely to travel outside the US until the coronavirus situation is resolved
- 54% of Americans would be unlikely to attend any conventions or conferences until the coronavirus situation is resolved

Canadian Travel Outlook³

According to Google's October 8, 2021 report, Canadians are still cautious about traveling due to the uncertainty around travel restrictions and consistent safety protocols.

¹ Destination Canada State of the Industry June 2021 Report, Data up to May 2021.

² Destination Analysts' Coronavirus Travel Sentiment Index Report – Key Findings, October 19, 2021, data as of October 15, 2021

³ Google Global Travel Intent Survey – online survey between October 8, 2020 – August 13, 2021, each N~1,000

- 15% of Canadians are looking to book a domestic trip in the next three months;
- 9% of Canadians are looking to book a domestic trip in the next three to six months;
- 16% of Canadians are looking to book a domestic trip after October 8, 2022

Ontario Resident Sentiment:

According to Destination Canada’s resident sentiment survey from October 19, 2021, Ontario has been on a continuous upward trend since February 2021 in levels of welcoming visitors⁴.

- 76% of Ontarians would welcome visitors from other parts of Ontario;
- 65% of Ontarians would welcome visitors from other parts of Canada;
- 33% of Ontarians would welcome visitors from the U.S.

According to Destination Canada’s resident sentiment survey from October 26, 2021, Ontarians are feeling consistently safe travelling since July 2021⁵:

- 81% of Ontarians feel safe to travel within Ontario;
- 60% of Ontarians feel safe to travel to other provinces;
- 32% of Ontarians feel safe to travel to the U.S.

⁴ Destination Canada Resident Sentiment Survey Report, October 19, 2021, N~1,800 adult Canadians, N=605 for Ontario and each minimum N=200 for each province

⁵ Destination Canada Resident Sentiment Survey Report, October 26, 2021, N~1,800 adult Canadians, N=611 for Ontario and each minimum N=200 for each province

STRATEGIC DIRECTIONS

Destination Ontario's three-year *Strategic Playbook (2018 to 2021)* continues to support Destination Ontario's work as the lead provincial tourism marketing organization for Ontario. The *Strategic Playbook* outlines key objectives and strategic priorities that are still applicable to the industry's impact from COVID-19. The agency's strategies will continue to be guided by principles to grow the tourism industry and support marketing and partnership efforts that will have positive economic growth and job creation for Ontario.

Objectives

- Grow visitor volume and expenditures from Ontario's priority markets.
- Work across the industry through content and partnerships.
- Build a strong Ontario brand and regularly measure its impact.
- Provide content that visitors want and need.

Strategic Priorities

1) Visitor First Marketing

Destination Ontario marketing campaigns will continue to be anchored in consumer insights, search interest data and product segmentation information to help reduce friction and provide value to potential travellers. The agency will focus marketing campaigns on inspiring consumers through their passions and interests. Destination Ontario will map out and establish the best possible position in the visitor path to purchase and focus efforts there. The agency will inspire travel to and around Ontario and focus investment on highest return markets, integrate market activity and remain flexible to opportunities. Audience data, previous campaign learnings and consumer insights will inform the mediums that Destination Ontario markets in and activities the agency undertakes.

2) Re-defining Partnerships

Destination Ontario will lead and collaborate with industry partners toward mutual success, strong return on investment and provide value to industry stakeholders.

In the international markets, Destination Ontario will leverage the Canada brand and Destination Canada's work internationally to put Ontario first and drive economic impact. The agency will place Ontario top of mind in key, high potential markets and measure results driving increased visitation and spend across Ontario.

3) Strong Research, Strong Outcomes

Destination Ontario will continue to develop a holistic research approach and improve how data is mined to incorporate insights into strategic planning and in all marketing activities across the agency. Destination Ontario will strengthen advertising impact tracking and investigate and adopt new, innovative measurement tools.

Additionally, the agency will further enhance understanding of the consumers' path to purchase. Destination Ontario will continue to evolve to an agency that has strong value-for-money evaluation practices and that focuses on campaign performance, insights, and investment.

4) Dynamic Organization

Destination Ontario will connect, lead, and inspire a team approach within the agency and across the industry. The agency will be nimble, adopt a culture of ongoing program evaluation and regularly evaluate program performance.

Future Strategic Planning

As the industry emerges from the COVID-19 challenges, and in alignment with the Ministry's priorities, Destination Ontario will look to developing and implementing a new strategic plan.

OVERVIEW OF CURRENT PROGRAMS AND ACTIVITIES

Destination Ontario's Business Plan for 2022-23 is focused on strategic activities and programs to help Ontario's tourism industry continue to recover from the challenging past two years related to COVID-19. The tourism industry has been significantly affected, one of the industries that has been hardest hit and likely one that will take the longest to recover. Given that the impacts from the pandemic continue and may take several years to return to pre-pandemic levels, Destination Ontario's budget will remain flexible during this fiscal year. Destination Ontario will make in-year adjustments as needed to address changes affecting travel, shifting target markets, if needed, and to meet the needs of the tourism industry.

As an agency of the government, Destination Ontario will work closely with the Ministry to align recovery efforts with the Ministry's priorities, including those outlined in the white paper – *Reconnecting Ontarians: Re-emerging as a Global Leader*, as well as the recommendations from the Tourism Economic Recovery Ministerial Task Force. The agency will remain focused on collaborative areas of opportunity to assist stakeholders to recover and rebuild. Wherever possible, Destination Ontario will ensure that its work complements the Ministry's priorities, including showcasing the Ministry's synergies of heritage, sport, tourism, and culture. This will further complement the visitor experience and maximize economic impact for the industry.

As the lead provincial tourism marketing organization, Destination Ontario will collaborate with tourism stakeholders through its marketing efforts. Destination Ontario will continue to be guided by the agency's *Roadmap to Recovery* and will build strategic plans to showcase Ontario as a safe and beautiful travel destination to key markets in Canada, the U.S. and internationally. The intent of driving economic impact and achieving direct results for the tourism industry across the province will continue to remain a top priority.

Strong and coordinated marketing efforts will be extremely important as the landscape of global tourism competitiveness becomes aggressive. Tourism destinations around the world will all be vying for the same tourists. Ontario will need to stand out amongst the competition; first to encourage Ontarians to travel within their own province rather than exporting their tourism dollars elsewhere, and second, inspiring and attracting visitors from the U.S. and internationally.

Corporate Governance

As an agency of the government of Ontario, Destination Ontario is governed by a Board of Directors comprised of business leaders and based on recommendations from the Minister of Heritage, Sport, Tourism and Culture Industries. Board members are public appointments by the Lieutenant Governor in Council. Destination Ontario staff will continue to work closely with the Board to ensure they have the necessary briefing materials and information to help them provide informed strategic guidance and direction on key decisions.

President's Office

The President's Office provides executive support to the President and CEO in the operational planning, management, and implementation of the agency's initiatives, including corporate communications and management of the board and industry committees. As an agency of the Ministry, Destination Ontario regularly liaises with the Ministry. The President's Office will continue to work closely with the Ministry to collaborate on government communications and recovery programs to support the industry from the challenges of COVID-19. Destination Ontario was pleased to bring forward initiatives and collaboration opportunities through agency roundtables in April and October 2021. Destination Ontario will continue these discussions with the Ministry and sister agencies to support recovery efforts.

Corporate Services

The Corporate Services team oversees business operations, financial management, procurement, human resources, legal, facility, and information technology services management for Destination Ontario. The Corporate Services team will support Destination Ontario with keeping business operations functioning, including executing agreements efficiently and effectively to support industry recovery efforts.

All activities of the agency are supported by the President's Office and Corporate Services.

Marketing

Destination Ontario's primary mandate, as the lead provincial tourism marketing organization, is to market Ontario as a preferred tourism destination. Destination Ontario builds positive destination awareness through integrated marketing campaigns within Ontario, across Canada and in priority U.S. and international markets to promote Ontario as a top travel destination.

Destination Ontario's marketing efforts are supported by guidance and collaboration with tourism partners across Ontario, including RTOs, DMOs, sector associations, other provincial agencies, individual tourism operators, and Destination Canada. International marketing efforts are further supported by in-market agencies.

In 2021, Destination Ontario launched a refreshed website, destinationontario.com, incorporating a visitor-first and user-focused experience for consumers and tourism stakeholders. Destination Ontario will continuously optimize the content to best position the site to positively affect traveler's purchasing decisions to build Destination Ontario's authority, knowledge, position, and positive relationship with its audience. Content will build on 'Know Before You Go', seasonal and experiential content with on-going optimization and updates for relevance. The corporate site (destinationontario.com/corporate) will provide the tourism industry with information about Destination Ontario, including, marketing content, partnership opportunities, research, and travel media information. The image and video media hub was also enhanced in 2021 and provides users with an array of Ontario images and videos free of charge. This site will continue to be maximized with inspirational content in 2022-23.

As part of the content strategy, Destination Ontario will deliver value-driven content campaigns that connect travellers with dynamic travel ideas through written content, short and long-form video and social channels such as Facebook, Twitter, Instagram, WeChat and Weibo for China. Destination Ontario will also work with sister provincial agencies and the Ministry to collaborate on creating and/or amplifying content that is relevant and important to current Ministry priorities.

Ontario, Canada & United States (U.S.) Markets

Destination Ontario's marketing efforts in 2022-23 will continue to follow the agency's *Roadmap to Recovery*, aligning to government health and safety guidelines at all times. Destination Ontario will promote the Ontario market to Ontarians including recognition of the 'Ontario Staycation Tax Credit' in 2022 as a travel motivator. The agency will also look to broadening its marketing efforts into other Canadian regions, as well as targeted campaigns into key U.S. drive and fly markets; all with an objective of welcoming travellers back to Ontario to drive increased visitation and expenditures.

International Markets

Destination Ontario promotes Ontario as a travel destination in key international markets. Destination Ontario works closely with Destination Canada and travel companies (tour operators, wholesalers, and travel agents) in priority markets abroad to increase awareness of the province and drive sales of Ontario's market-ready tourism products and experiences.

In the context of COVID-19, competition for attracting the international traveller will be fierce and it will take time to return to pre-existing travel volumes. As travel safely resumes, Destination Ontario-led campaigns and activities and joint marketing with Destination Canada and key travel trade partners will be essential to international recovery efforts.

While the pandemic continues, promotional activity through tradeshow and marketplaces will begin to shift from fully virtual to hybrid and then to in-person and Destination Ontario will continue to participate wherever possible to ensure that Ontario is kept top-of-mind and stands ready to meet the needs for future pent-up demand.

Northern Ontario Marketing

Destination Ontario has a specific focus on increasing visitation to Northern Ontario. Destination Ontario works with Northern tourism partners to market the North's unique experiences and natural landscapes. While the North as a destination is promoted and integrated across all the agency's work, there is also a specific concentration on avid consumers with a focus on powersports and touring, angling and hunting, and outdoor adventure.

Destination Ontario's Northern marketing efforts are supported and undertaken in collaboration with strong Northern partners, including RTOs 13 and 12, DMOs, sector associations and individual tourism operators.

A significant segment of Northern Ontario's tourism industry relies heavily on the U.S. traveller. After a pause into the U.S. markets due to COVID-19, Destination Ontario's Northern marketing programs and activities will focus back on both avid and leisure American travellers, while continuing efforts in Ontario and other source Canadian markets. Collaboration with Northern partners will be critical to leverage marketing plans to target consumers to return to Ontario and to welcome new visitors.

Marketing Intelligence and Business Strategy

Destination Ontario conducts tourism research and data analysis that provides market intelligence and consumer behaviour insights to enable the agency and its tourism partners to make more informed business decisions, be flexible to changing landscapes and deliver results for tourism businesses. Destination Ontario also engages in tracking the success of marketing campaigns to ensure sound return on investment and learnings for future campaigns with a view of maximizing value-for-money. Consumer travel intention and motivators and product research will be especially important this year as Destination Ontario implements recovery efforts and a return to travel.

Media Relations and Broadcast Program

Destination Ontario promotes Ontario as a must-see travel destination through its earned media program. Working closely with journalists, editors, influencers and broadcast media outlets, the earned media team works to garner positive media coverage that generates interest and delivers results.

As a result of the COVID-19 pandemic, Destination Ontario's earned media program increased its focus on the domestic market; this year the team will incorporate more U.S. and international travel back into the portfolio of activities.

To showcase all that Ontario has to offer, Destination Ontario works in close collaboration with RTOs, DMOs, sector associations, Ministry sister agencies, Destination Canada and in-market agencies abroad to pitch and secure regular print and online articles, and television and radio broadcasts. Customized media tours, media marketplaces and events are key components of the program.

A Team Ontario approach with all partners is essential to recovery efforts. Destination Ontario will continue its work to generate positive media coverage that is appropriate and informative for a new travel reality, while focusing on travelling safely.

Partnerships

As the lead provincial tourism marketing organization, Destination Ontario is uniquely positioned to offer industry stakeholders the opportunity to leverage the agency's programs and activities to market their experiences and products.

The agency will continue to partner with RTOs, DMOs, sector associations, Ministry sister agencies, Destination Canada and private stakeholders to build upon collaboration to date and use established relationships to assist with recovery efforts

across the province. Destination Ontario will steward its role as the lead marketing organization, taking a customized approach to supporting partners, with a focus on driving direct results to local tourism businesses.

Destination Ontario will continue to lend expertise directly to partners by sharing insights, research, communications tools, and marketing support to help the industry regenerate business and bolster economic activity.

Ontario Travel Information Services

Ontario Travel Information Services (OTIS) provide a warm welcome to visitors whether in-person, on the phone or virtually. Destination Ontario's experienced and knowledgeable travel counsellors offer visitors valuable information on travel ideas in Ontario to enhance their trip planning process and help them discover the variety of experiences available in Ontario.

Operations of the Ontario Travel Information Centres (OTICs) will continue to be guided by government health protocols and safety measures. Staff will provide travel information using safety precautions to ensure the well-being of staff and visitors.

Destination Ontario continues to evolve its strategic modernization initiatives through a 'Visitor Care' approach to enhance the delivery of tourism information services to visitors and industry beyond the traditional bricks-and-mortar model, meet changing consumer expectations, and support recovery through delivery of modernized services.

IMPLEMENTATION PLAN

In 2022-23, Destination Ontario will continue its focus on the agency's legislated mandate – to promote Ontario as a travel destination with the goal of increasing visitation and expenditures. This goal will be of the utmost importance to support the recovery and rebuilding of tourism across Ontario. With travel resuming and consumers feeling comfortable travelling safely again, it will be necessary to deliver visitor-first marketing with inspirational content, stimulating ideas, and access to travel information. Plans will be adjusted as needed to meet any continued impacts related to COVID-19, such as future waves and/or if health authorities deem travel as a non-essential activity.

Destination Ontario's plans will align to the upcoming Ministry's priorities, including those outlined in the white paper – *Reconnecting Ontarians: Re-emerging as a Global Leader*, as well as the recommendations from the Tourism Economic Recovery Ministerial Task Force. Where possible, through its marketing activities and programs, the agency will support the Ministry's efforts, ensuring a stronger collaborative approach to the industry's recovery.

Marketing

The global pandemic has had a devastating impact on tourism and Destination Ontario will play an important role in supporting the industry by inviting travellers back to experience the beautiful province of Ontario. Destination Ontario's phased *Roadmap to*

Recovery strategic plan will continue to help support the tourism industry and will continue to guide the agency's marketing planning for 2022-23. Some phases of the plan have already been implemented; 'Support Local' helped to support the industry during the pandemic, and 'Restart' initialized the easing back of travel as restrictions began to lift. The agency also implemented fall and winter campaigns for the Ontario market, partnered with WestJet for a Canadian market promotion, and delivered an awareness campaign internationally for future travel. In 2022-23, Destination Ontario will continue with seasonality campaigns for the Ontario Market and broaden its efforts to other regions in Canada, the U.S. and internationally, as budget permits. The phased marketing strategy will work to increase consumer confidence, support the industry, and influence consideration of Ontario as a preferred destination.

Market plans will be guided by the best possible market intelligence available to make timely and responsible decisions while remaining flexible and ready to shift as necessary. Destination Ontario will develop its marketing activities based on strong strategies, effective media planning and effective creative ideas to generate incremental visitation and incremental expenditure. Destination Ontario will support the industry by driving consumer leads to tourism businesses through impactful partnership campaigns.

The essence of Destination Ontario's marketing will highlight the province's strengths of inclusiveness and diversity, while also showcasing its beautiful landscapes and scenery. Strategic themes will drive content connected to seasonality and product experiences, key avid experiences, families, as well as incorporating content for accessible, Indigenous, Francophone, Lesbian, Gay, Bisexual, Transgender, Queer+ (LGBTQ+), and multicultural audiences.

Through its marketing plans Destination Ontario:

- will deliver marketing services that contribute to regional and economic development,
- will become a centre of excellence supporting provincial marketing, and
- will lead the marketing of Ontario as a travel destination nationally and internationally.

Ontario Market

The annual plan for the Ontario market focuses on seasonality and product experiences to encourage Ontarians to plan a getaway in Ontario. This cautiously optimistic plan will align with the Ontario government health and safety guidelines while being flexible to respond to changing conditions. It is anchored by a collaborative, partnerable marketing system that leverages partner content and connects consumers with trip ideas and operators.

Outputs

- Localized advertising campaigns in Ontario
- Support the 2022 'Ontario Staycation Tax Credit'

Outcomes

- Increase in visits and visitor spend in Ontario from Ontarians
- Targets:
 - Generate 293K in incremental visitation and \$37M in incremental spend
 - Generate 2M leads to industry

Key Performance Indicators (where applicable):

- Return on marketing investment
- Leads generated
- Net promoter score
- Keyword performance
- Media cost per lead
- Click through rates
- Increase in travel intention in Ontario
- Web traffic sources
- Total visits from the target geography
- Value of claimed Ontario tax credit (*if available from Ministry of Finance potentially in 2024*)

Canada Market

Destination Ontario plans to target key Canadian drive and fly markets, focusing on increasing visitation and expenditures to Ontario. Visitation data shows that Ontario receives about seven million visits from Canadian provinces a year spending \$3.3 billion. These travellers stay an average of 2.8 nights and spend about \$465 per visit – compared to an Ontarian who spends about \$141 per visit⁶.

Budget permitting, Destination Ontario would be targeting drive markets of Quebec and Manitoba and fly markets of British Columbia, the Maritimes and Alberta. These markets will continue to be evaluated over time to ensure higher-yield target traveller market availability and potential marketing programs with Destination Canada.

Outputs

- Advertising campaigns in key drive and fly market provinces
- Partnered marketing campaigns with Destination Canada on domestic travel

Outcomes

- Increase in visits and visitor spend in Ontario from key provinces (this market is to be confirmed and may have limited budget to activate)
- 2022 benchmark year* (**2022 will be Destination Ontario's first Canada campaign and understand the need before procuring research vendor for ad*)

United States Market

Welcoming back U.S. visitors is a critical part of rebuilding Ontario's tourism economy. Destination Ontario's strategy will take a targeted approach starting with the rubber tire

⁶ Statistics Canada, Visitor Travel Survey, 2018

drive markets followed by a focus on key fly markets. Destination Ontario, working with key gateway city partners, will focus on opportunity near markets in New York State and Michigan for the drive market. Budget permitting, the fly market of focus for entry would be Boston. It is a mid-sized market with flight lift into Toronto and Ottawa. This market would allow Destination Ontario to test creative performance, audience engagement and potential arrivals data as the agency builds an expandable fly market strategy levelling up to large, more expensive, and competitive markets like Chicago and New York City.

Destination Ontario will build a share of visitation from select markets of interest in the U.S. and will prioritize near markets and car travel first, catering to rubber-tire access. Focus on air travel markets will occur as industry, health, and economic factors progress. The agency will also leverage gateway city partners to capitalize on U.S. destination travel interest. It will pilot a collaborative partner model into fly and drive markets.

Northern markets and avid interests (fishing, hunting, snowmobiling, motorcycle) are driven by unique U.S. corridors and will be addressed through a dedicated U.S.-Northern marketing plan and budget.

Outputs

- Advertising campaigns in key drive and fly market U.S. markets
- Partnered campaigns leveraging gateway city partners

Outcomes

- Reach 2019 pre-COVID overnight visitation from the drive and fly U.S. markets
- Targets (budget permitting for both drive and fly markets):
 - Generate 555K in incremental visitation and \$151M in incremental spend
 - Generate 1.5M leads to industry
- Target (budget permitting drive market only):
 - Generate 343K in incremental visitation and \$132M in incremental spend

Key Performance Indicators (where applicable):

- Return on marketing investment
- Leads generated
- Net promoter score – target lift of 2%
- Keyword performance
- Media cost per lead
- Click through rates
- Increase in travel intention to Ontario – target 33% (drive) and 24% (fly)
- Web traffic sources
- Total visits from the target geography

International Markets

While the impact of COVID-19 continues to disrupt international travel, Destination Ontario will continue to focus on maintaining strong relationships with travel trade and

media in priority markets and inspiring future travel. Throughout 2021-22, the agency has been successful in engaging trade and media by maintaining a strong voice through ongoing communications, by participating in key business development events and travel shows virtually, and by inspiring future business and travel through virtual training and providing tailored pitches.

Destination Ontario recognizes that preliminary international travel trends indicate a desire for safety, flexibility, nature, a slower pace, RV travel, relaxation, and luxury. Canada – and specifically Ontario – is well-positioned to meet the demand for this type of travel given the open-spaces, natural environments, wide-outdoors, parks and safety that Ontario can offer. Destination Ontario is also hearing that Canadian cities are seen as less congested than cities in other countries and that the visiting friends and relatives' segment will be among the first to travel. Welcoming international travellers back through Ontario's gateway cities and across the province will need to take a balanced approach, given the potential hesitation by local areas to welcome foreign travellers back to their communities following the long period of a global pandemic. Ontario resident sentiment and public health guidelines are some of many key factors to be considered when determining the timing of when international travel should once again be promoted.

Taking a market-by-market approach, the agency has been planning for multiple recovery tactics, including highly visible marketing with trade partners, advertising on trade booking platforms, proactive outreach campaigns to key journalists and editors, in-market activations, influencer programs, and marketing campaigns.

Destination Ontario is planning to extend its 'Discover Together' marketing campaign, first launched in the U.K. and Germany in November 2021. Leveraging the insight that 'Visiting Friends and Relatives' is projected to be a first-mover market and that reconnecting with friends and family has become a priority for many people, the campaign targets Ontarian connections and high value travellers by engaging expats living in Ontario to inspire and encourage visitation by making it easy to imagine moments together. The campaign pushed to new market-specific landing pages highlighting reasons to visit Ontario, things to do, places to visit, road trip itineraries, and a curated list of bookable tour operator packages and trusted travel partners. Future phases focused on consideration and conversion and/or possible extension into other priority markets are planned for 2022-23, based on phase one success, available budgets, and market readiness indicators.

Outputs

When approaching the international markets, Destination Ontario's tactics will include:

- Building market strategies using research, data, and insights
- Continuing with tour operator and travel agent training
- Building and strengthening industry, partner, and key account relationships
- Showcasing Ontario at in-market and virtual tradeshow
- Developing in-market sales programs and meetings

- Welcoming trade and media through product (familiarization) tours and media visits
- Launching Destination Ontario led consumer campaigns in select markets
- Developing joint marketing agreements and promotions through trade channels
- Working with Destination Canada on consumer marketing and trade campaigns
- Working with international travel media on content
- Providing industry leadership and support

Destination Ontario will work closely with Destination Canada as it safely re-starts its marketing efforts. Ontario is well-positioned within Canada and it will be important to lean on a collaborative partnership as global travel resumes and the competition for international travellers increases.

Outcomes

Destination Ontario aims to generate \$5 million in incremental expenditures as a result of travel trade bookings (includes the U.S.); and train at least 2,500 travel agents on Ontario's travel products. With regards to earned media relations, the target is to generate \$35M million in earned media (includes the U.S.). The agency will market Ontario as a four-season destination internationally and will aim to have more travellers visiting more Ontario destinations year-round, spending more time and money.

Northern Marketing and Partnerships

Destination Ontario will continue to support the Northern tourism industry by working with partners across Northern Ontario. Given the significant impact that the U.S. border restrictions have had on Ontario's Northern tourism industry, it will be vital to collaborate for the return of American visitors and to continue additional focus on an Ontarian/Canadian traveller. The agency will continue to invest in and support Ontario's avid tourism industries of angling, hunting, powersports, touring and outdoor adventure. Additionally, Destination Ontario will promote the entire region as both a destination and unique area to experience the outdoors, arts, culture and heritage.

Angling and Hunting

Avid Angling and Hunting Media Program

Traditional avid anglers continue to be the mainstay consumers for the more than 2,000 lodges and resorts in Ontario. Through this program Destination Ontario will work to protect and maintain an avid consumer base in Ontario's best bet markets through more traditional opportunities, but also looking to engage avid consumers who are new to angling to effectively grow this consumer base. Additionally, the agency will build on the successes of previous years, by further diversifying the deliverables with greater importance given to social channels and content development. In 2020-2021, the social media component had 4.2M impressions, a reach of 3.3M and engagement of 215K.

Outputs

- Target of 50 television shows produced, aired, viewership numbers
- Target of 50 stories written and posted on the Northern Portal (www.northernontario.travel)

- Target of 20 pieces of written content for destinationontario.com, traffic tracked
- Minimum of 20 videos developed, tracked views, clicks to partners
- Number of social posts, impressions, reach, leads, engagement all up 10% from previous year

Outcomes

- Reach 2019 pre-COVID overnight visitation from the drive markets
- Generate incremental visitation and incremental spend
- Generate leads to industry – targets to be set in Q4

Key Performance Indicators (where applicable):

- Return on marketing investment
- Leads generated
- Net promoter score
- Keyword performance
- Media cost per lead
- Click through rates
- Increase in travel intention to Northern Ontario
- Web traffic sources
- Total visits from the target geography

Family Fishing Spring Campaign

Traditional anglers are becoming more limited and to ensure the sustainability of the angling industry Destination Ontario is supporting the industry through the development of a new consumer interest in the sport of angling. This campaign is intended to drive consideration from a family demographic and encourage planning for a family fishing experience for summer travel. The agency will further develop the intel and data acquired in year one of this program which will result in a broader understanding of this new consumer. The intel will allow Destination Ontario to make informed decisions on tactic selection and budget allotment to garner the greatest return on investment.

Outputs

- Targets:
 - Cost per visit under \$.50
 - Four family fishing articles developed for destinationontario.com
 - 40,000 visits to the angling page
 - 4,000 leads to partners
- Digital campaign showcasing family experiences at a Northern Ontario fishing lodge telling the story of an immersive experience that highlights fishing
- Five funding partners with an investment of a minimum of \$20,000 to augment the program

Outcomes

- Increase in angling bookings from the drive markets

Key Performance Indicators (where applicable):

- Leads generated
- Media cost per lead
- Click through rates

Angling Avid Digital Campaign

Destination Ontario will build off the successes of the inaugural Avid Digital Program in August 2021. The campaign drove 19M impressions, 1.6M video views and 242K clicks to partner content. Destination Ontario is planning this campaign to run again during the most important booking time for lodges and resorts, in February and March 2023. This program will drive directly to the sub-regional angling pages in Northern Ontario, targeting best bet markets of Southern Ontario, Michigan, Ohio, Minnesota, Illinois, and Wisconsin. The primary objective is conversion as measured by traffic/leads driven to each partner's angling landing page that fulfills on package options geared to the avid angler.

Outputs

- Targets:
 - Clicks to partners: 250K
 - Cost per click of less than \$1
 - Click through rate of 2%
 - Video views: 650K
- Digital campaign leveraging video and traffic driving ad media to drive anglers to relevant partner content and bookings
- Destination Ontario will partner with RTO13 - Destination Northern Ontario (DNO), Sunset Country, Superior Country, Algoma Country and Northeastern Ontario Tourism

Outcomes

- Increase in angling bookings from the drive markets

Key Performance Indicators (where applicable):

- Leads generated
- Media cost per lead
- Click through rates

Powersports and Touring

Avid Powersports Motorcycle Digital Media Program

Motorcycle touring continues to grow with an influx of purchases during the pandemic. Entry level riders are looking for places to ride. Destination Ontario will target new riders and build on the successes of previous campaigns to connect Ontario sledders with snowbelt destinations, loops, and trails. This year, leveraging social and unique audiences will be an opportunity to better content with this niche audience and respond to digital signals of intent. In 2020-21 the social media component had 18M impressions and 5M unique views.

Outputs

- Target of two stories written and posted on the Northern Portal with routes and trip planning information
- Number of social posts, impressions, reach, leads, with reach and engagement all up 10% from previous year

Outcomes

- Increase in motorcycle bookings from the drive markets

Key Performance Indicators (where applicable):

- Leads generated
- Media cost per lead
- Click through rates

Avid Powersports Snowmobile Digital Media Program

Snowmobiling continues to be a key winter economic driver for Northern Ontario. Destination Ontario will target avid riders and build on the successes of previous campaigns, by further diversifying the deliverables with greater importance given to social channels and content development. Results from the 2021-22 campaign are still being reviewed. These numbers will be used as a benchmark for measurement moving forward.

Outputs

- Number of social posts, impressions, reach, leads, with reach and engagement all up 5% from previous year
- Number of page views to landing page of content on destinationontario.com, with routes and trip planning information
Number of click throughs to partner sites from landing page

Outcomes

- Increase in snowmobile bookings from the drive markets

Key Performance Indicators (where applicable):

- Leads generated
- Media cost per lead
- Click through rates

Powersports Avid Partnerable Co-Operative Media Campaigns

Destination Ontario will build off the successes of the 2021-22 Avid Partnerable Media Program. This program creates co-operative media opportunities with niche media publishers for Destination Ontario and partners to create planning content. This program will drive directly to the sub-regional powersports pages in Ontario, targeting qualified markets of Southern Ontario, Michigan, and Ohio. The primary objective is conversion as measured by traffic/leads driven to each partner's powersports landing page that fulfills on package options geared to the avid rider.

Outputs

- Campaign includes display and digital media, value-add content and 10 partnerable ad placements with avid media
- Influencer content
- Advertising initiatives to promote influencer content

Outcomes

- Increase in powersports and touring bookings from the drive markets

Key Performance Indicators (where applicable):

- Leads generated
- Media cost per lead – less than \$2
- Click through rates of 5%

Outdoor Adventure

Ontario Market Plan – Seasonal Northern Outdoor Buy-in

To compliment the overall Ontario Market Plan, the outdoor adventure program will be part of the all seasonal pan provincial program. 2021-22 fall and winter, and 2022-23 spring and summer will be the benchmark standards. The outdoor adventure program has room to grow, therefore consideration will be given to a seasonal northern focus including a page within the campaign, a northern specific video, and other campaign elements as deemed worthy.

Outputs

- Number of stories
- Approximately 16-20 stories written or updated and posted on the Northern Portal for promotion
- Approximately 20-24 partners or experiences highlighted during promotions
- Impressions, reach, leads, clicks, and engagement increase to be determined after benchmark standards are set

Outcomes

- Increase in outdoor adventure bookings from the drive markets

Key Performance Indicators (where applicable):

- Leads generated
- Media cost per lead
- Click through rates

U.S. Paddling Campaign

In 2022-23, Destination Ontario looks to invite U.S. paddlers to visit Ontario to once again experience the premier paddling destinations Ontario has to offer. This campaign is intended to drive not only awareness, but to encourage U.S. avid paddlers to book their paddling adventure in Ontario. Destination Ontario will further develop the intel and data acquired to grow this campaign which will result in a broader understanding of this market and drive growth. This intel will inform decisions on tactic selection and budget

allotment to garner the greatest return on investment. The goal is to grow this program to be an annual partnerable program focusing on all premiere Ontario paddling routes.

Outputs

- Digital campaign targeting outdoor adventure targets in key U.S. near markets

Outcomes

- Increase outdoor adventure bookings from the U.S. market

Key Performance Indicators (where applicable):

- Leads generated
- Media cost per lead
- Click through rates

Northern Portal and Social Content Development

Building on the success of its partnership, Destination Ontario in collaboration with DNO and industry partners, will increase awareness of the Northern Ontario as a travel destination, through the development of angling and hunting, powersports and touring, and outdoor adventure content for the Northern Portal and social media channels. This includes editing of all content received and creating new content that supports consumers booking directly with an operator via links in stories that drive directly to operator experiences.

Outputs

- Minimum of 550 posts developed and posted on social media
- Minimum of 180 stories developed, edited, and uploaded

Outcomes

- Increase visitation and visitor spend in Northern Ontario
- Targets to be built with media strategy

Key Performance Indicators:

- 1,750K sessions
- 435K leads to partners
- 215K social actions on social media
- 1,650K reach on social media

Media/Influencer Familiarization (Fam) Tours

In partnership with industry, Destination Ontario will work with approved media to tell the stories of the angling and hunting, powersports and touring, and outdoor adventure products in Ontario, specifically in the North. Each fam tour will result in shared assets that may include photography and/or video for future usage by Destination Ontario. Assets will vary with each tour supported. Fam tour numbers were impacted due to COVID-19, but it is anticipated that in 2022-23 the agency will be able to support a approximately 40 tours across all segments.

Outputs

- Final reports delivered with results and learnings
- Approximately 40 proposals received from industry and fam tours completed
- Various assets received from industry partners for future use
- Various media/influencers telling compelling and awe-inspiring stories of angling and hunting, powersports and touring, and outdoor adventure products in Ontario

Outcomes

- Number of stories pitched in year
- Number of stories approved to be published
- Number of stories published in year

Consumer Shows

To build familiarity and brand awareness for the angling and hunting, powersports and touring, and outdoor adventure product in Ontario, Destination Ontario will leverage key consumer shows that connect Destination Ontario and industry partners with potential travel consumers. Through participation at these events the agency staff and industry partners will educate and engage a captive audience through one-on-one conversations. It is also an opportunity for Destination Ontario to strengthen and build relationships with tourism industry stakeholders and educate them on the agency's marketing leadership, programs, and partnerships opportunities.

Outputs

- Partnerships with relevant stakeholders for distribution of consumer materials at shows such as angling and hunting regulations and powersports trip planning tools like regional maps
- Number of fulfillment pieces distributed at the show
- Number of engaged consumers
- Number of attendees at show
- Number of operator partners displaying the Ontario brand

Outcomes

- Strengthened partnerships with all four rural DMOs in Northern Ontario
- Increase awareness and familiarity of Northern Ontario product

Key Performance Indicators (where applicable):

- Number of partners showcased
- Number of follow ups from show

Group of Seven

Ontario has a very distinct relationship with the Group of Seven. The group is Canada's greatest art collective and they came together in this province, and through their collaboration they changed the art world in Canada forever. Destination Ontario will partner with DNO and Northeastern Ontario Tourism, Sudbury Tourism, Algoma Country, Tourism Sault Ste. Marie, and the McMichael Canadian Art Collection, on a spring Group of Seven campaign. This campaign will develop the thread that will see

consumers visiting the galleries to view the paintings on the walls and then heading out to view the actual landscapes that was the inspiration for the art.

This program will target adults/couples that are culturally motivated or those that enjoy learning while experiencing nature. This campaign will target domestic travellers for the summer of 2022. Destination Ontario will build on the successes of the 2021 fall Group of Seven program that resulted in 2M video views, 136K in web sessions, 403K page views on destinationontario.com and over 40K in engagement. This program successfully delivered over 97% positive engagements on social.

Outputs

- Digital campaign
- Minimum of six funding partners, with an investment of up to \$50,000

Outcomes

- Increase itinerary bookings from the Ontario market

Key Performance Indicators (where applicable):

- Leads generated
- Media cost per lead
- Click through rates
- 2M video views
- 40K social media engagement
- 135K sessions on the destinationontario.com Group of Seven page
- 400K page views on destinationontario.com

Pan-Northern Campaign

Due to COVID-19, a Pan-Northern campaign originally planned for spring 2020 was not executed in the U.S. market. Instead, Destination Ontario was able to continue with the spirit of the Pan-Northern partnership in 2020-21 and 2021-22 with a campaign targeted to Ontarians and Manitobans (for the Northwest Ontario region only). Destination Ontario, DNO and DMO partners worked together on seasonal domestic campaigns and to date, these campaigns have combined to drive over 16 million completed video views and 600,000 visits (and counting) to planning content featuring Northern Ontario destinations.

In 2022-23, Destination Ontario will seek to revive plans for the Pan-Northern U.S. campaign and collaborate with Northern partners to support Northern tourism recovery. The Pan-Northern campaign will be developed in partnership with interested DMO partners.

The marketing objectives will be to:

- Create engaging messaging that builds consideration of Northern Ontario as a travel destination

- Promote Northern Ontario leisure experiences to key U.S. markets targeting family and couples/groups of friends through a collaborative brand and content-driven approach

Outputs

- Development of a campaign targeting the growth market of leisure family travellers in U.S. border markets with the goal of increasing overnight stays in Northern Ontario
- DMO partners will work with Destination Ontario and DNO to identify products/experiences of focus per season and thereby inform partner hero content for the Northern portal (northernontario.travel). Experiences promoted will include soft outdoors, resorts/lodges, family fishing, leisure touring, arts and culture, and urban attractions

Outcomes

- Increase visit and visitor spend in Northern Ontario

Key Performance Indicators (where applicable):

- Return on marketing investment
- Leads generated of 450K
- Net promoter score
- Keyword performance
- Media cost per lead
- Click through rates
- Increase in travel intention to Northern Ontario
- Web traffic sources
- Total visits from the target geography

Social Media Marketing

Social media is an essential piece of Destination Ontario's business marketing strategy. Social platforms connect the agency with customers, increase awareness about the brand, and boost leads to partners or trip-planning content. Destination Ontario will look to grow social media engagement, mentions, shares and referral traffic.

Outputs

- Social media content calendar aligned with search interest, product availability and partner priorities
- Content creator partnership program
- Creative and platform experiments that focus on increasing conversion rates
- Number of content made available to consumer through social media channels

Outcomes

- Increase audience visibility
- 2020 Engagement Rate = 1.5* (**2020-21 actuals*)

Key Performance Indicators (where applicable):

- Increase Facebook and Instagram engagement
- Increase positive mentions through Facebook and Instagram
- Increase in content shares

Creative Services

Destination Ontario will invest in high-quality components, including employee training so that the customer's experience is always consistent with the brand message.

Outputs

- Develop training program and materials for updated brand guidelines
- Develop a process for onboarding new staff into the brand guidelines
- Redesigning the agency website(s) with the new branding
- Developing templates for social media posts and other channels
- Increase library of new media formats e.g. 9x16 mobile videos

Outcomes

- Improve brand consistency through the entire agency (*No benchmark available, new program.*)

Key Performance Indicators (where applicable):

- 100% of team members trained on new branding guidelines
- Percent of properties that adhere to brand guidelines
- Percent of the design system (web) that has been updated
- All materials created for social media meet branding guidelines
- Number of new photos added to the library
- Number of new photo and video shoots that include a new media format

Media Relations and Broadcast Program

Destination Ontario continues to promote the province as a must-see travel destination through its media relations program. Working closely with journalists, editors, influencers, radio, and television outlets, Destination Ontario generates positive earned media coverage that informs and inspires future travellers, while demonstrating a high return on investment for the organization and its partners.

Throughout 2021-22, Destination Ontario was successful in engaging both domestic and international media with adaptable tactics for each step of the *Roadmap to Recovery*. As a result, Ontario was featured in notable outlets, including in *The Globe and Mail*, *The Toronto Star*, *enRoute*, *The Weather Network*, *CTV*, *Breakfast Television*, *CH TV*, *The New York Times* (U.S.), *Lonely Planet*, *About Time* (U.K.), *Mail Online* (U.K.), *Berliner Morgenpost* (Germany), *Le Temps d'un Voyage* (France), *Aire* (Mexico), *Tabzine* (Japan) and *GQ* (China).

The agency's earned media program will continue to inspire travel from priority markets, keeping Ontario top-of-mind by proactively pitching media, nurturing relationships,

participating in virtual media relations events, collaborating with partners, leveraging in-market expertise, and supporting industry stakeholders.

As travel resumes, a Team Ontario approach with all partners will remain essential to recovery efforts. Destination Ontario will continue collaborating with RTOs, DMOs, sector associations, Ministry sister agencies, Destination Canada, and in-market agencies to secure coverage in targeted print and online publications, television and radio broadcasts, and livestreams. Customized media tours, media marketplaces and events will continue to be key components of the program.

Outputs

Destination Ontario's media relations tactics will include:

- Proactively pitching tailored story ideas aligned with Destination Ontario's marketing campaigns, brand, and seasonal product spotlights
- Pitching, planning, and executing media tours
- Providing industry leadership and support
- Collaborating with Destination Canada, RTOs, DMOs and industry to leverage partner-led media relations efforts
- Participating in media shows, marketplaces, and events
- Responding to media inquiries, sharing content, images, and videos
- Maintaining important relationships with media
- Developing COVID-19 safety protocols aligned with current and local public health guidelines
- Remaining flexible with media relations tactics and messaging that are adaptable, appropriate, and informative for the new travel reality

Outcomes

Destination Ontario aims to generate \$20 million Advertising Value Equivalency (AVE) in earned media. The agency will continue to market the province as a four-season destination and will aim to have more travellers visiting more Ontario destinations year-round, spending more time and money.

Industry Relations

As the lead provincial tourism marketing organization, Destination Ontario is uniquely positioned to offer industry stakeholders the opportunity to leverage programs and activities to market their experiences and products.

The agency will continue to partner with RTOs, DMOs, sector associations, Ministry sister agencies, Destination Canada, and private stakeholders to build upon collaboration to date and use established relationships to assist with recovery efforts across the province. Destination Ontario will steward its role as the lead marketing organization, taking a customized approach to supporting partners, with a focus on driving direct results to local tourism businesses.

In 2021-22, the industry relations team launched "Destination Ontario Presents" – a series of informational webinars for Destination Ontario's industry partners, including

RTOs, DMOs, Ministry staff, sector associations, sister agencies, and operators. Webinars are led and hosted by the industry relations team with presentations from both in-house and external experts. The vision for the webinars is to position Destination Ontario as an industry leader and trusted resource; create easily accessible, high-quality, and professional material; and lend expertise directly to partners by sharing insights, research, communications tools and marketing support to help regenerate business and bolster economic activity.

Partnerships

Through a partnership with Destination Toronto and Destination Canada, the agency will continue its involvement in a multi-year culinary initiative that will support one of the hardest hit sectors of the tourism industry – restaurants. The goal of the initiative is to raise the profile of Toronto, Ontario, and Canada as a world-renowned culinary destination. This initiative will be significant to the international markets, where travellers often seek destinations for their culinary and fine dining experiences. The initiative is planned to bring local and world-wide attention and recognition and deliver benefits for years to come. Once announced, more details of the multi-year culinary initiative will be available.

Destination Ontario will continue to work with its sister agency, Ontario Heritage Trust, through a multi-year partnership to market the annual Doors Open Ontario program. This partnership will provide an opportunity to highlight culture, heritage, and tourism collaboratively.

The Ontario Heritage Trust works with communities across the province to open the doors, gates, and courtyards of local unique and most fascinating cultural sites so visitors can explore the stories inside. Since the program was launched in 2002, over 8.3 million visits have been made to thousands of unique buildings and spaces. The Doors Open Ontario program also has a big impact on local communities, with participants spending more than \$11 million during their travels in 2019 as they learned about heritage conservation, local history and had fun.

Destination Ontario will also support key sector associations with whom the agency has had a long-standing partnership with - the Tourism Industry Association of Ontario, Attractions Ontario, Resorts of Ontario and Festivals and Events Ontario. Working with these partners, Destination Ontario will continue to support marketing efforts that positively impact tourism businesses and experiences across Ontario.

Destination Ontario will also support the Canada Games 2022 to highlight Ontario as a tourism destination for the thousands of visitors that will be attending the games including to athlete participants, participants' families and friends, and general spectators. The Canada Games are being hosted in the Niagara Region; however, the agency will capitalize on the opportunity to promote other regions of Ontario. Destination Ontario's Ontario Travel Information Services staff will provide in-person visitor information services support and the agency will also partner with the Region of

Niagara for the 13 for 13 Cultural Festival, showcasing Ontario talent and tourism experiences.

As other opportunities arise, Destination Ontario will remain open and flexible to partnership initiatives that will support the recovery of Ontario's tourism industry

Partnered Marketing

Destination Ontario is building a collaborative partnership model where the agency works together with partners to build positive destination awareness and prospecting high value travellers for marketing leads driving to destinations and experiences across Destination Ontario's markets of focus.

Destination Ontario will determine the markets and media approach and explore strategic partnerships that:

- Explore opportunities for rubber tire markets (e.g., American Automobile Association, city passes)
- Explore airline partnerships for fly markets (e.g., Air Canada, Porter)
- Leverage Destination Ontario's and partner travel centres and roaming staff

Outputs

- Partnerable programs for the Ontario market, the U.S. market and international markets

Outcomes

- Increase Destination Ontario's tourism product expertise and access to resources while decreasing the acquisition cost
- Creating predictable investment to extend audience reach
- 2022 benchmark year as Destination Ontario updates the program to share for partnership opportunity
 - Partner investment contribution totals
 - Number of partners participating in programs
 - Industry partner customer satisfaction survey

Key Performance Indicators (where applicable):

- Dollar value of partner investment
- Number of partners participating in programs
- Industry partner customer satisfaction survey

Ontario Travel Information Services (OTIS)

Destination Ontario's OTIS provide various visitor information channels for all tourists – whether they be international, U.S., domestic, regional, or local – to receive travel advice and information on destinations, attractions, and product experiences across Ontario.

Operations in the Ontario Travel Information Centres (OTICs) will continue to be guided by government health protocols and safety measures as the health and safety of OTIS

staff and visitors remains the top priority. If needed, OTICs will pause operations and only re-open in tandem with public health guidelines. Employee and Visitor Screening Checklist will continue to be required for entry into an OTIC and the buildings will continue to operate with appropriate days and hours to meet changing travel demand. Travel Counsellors will also continue to offer travel counselling services by phone and email.

Curbside pick-up will continue to be offered where a visitor calls the OTIC from their vehicle in an OTIC parking lot to request information/materials – a travel counsellor will bring the materials directly to their vehicle (no entry into the OTIC required). For those visitors who still wish to receive in-person travel counselling services they have the option to enter the OTIC and speak to a travel counsellor in person and receive available maps and brochures.

Where feasible, OTIS staff will continue to partner with tourism organizations and businesses to sell tourism experiences and attractions and offer onsite promotional opportunities to stakeholders. Travel counsellors will continue to provide customized travel advice on where to go and what to see and do with a view to extending visitor stay and visitor spend.

Destination Ontario will also continue to enhance its OTIS modernization initiatives and service delivery channels beyond the traditional bricks and mortar model by taking a 'Visitor Care' approach to directly impact the visitor experience in order to meet changing consumer expectations, and support tourism recovery.

The agency continues to build the infrastructure to provide high quality travel advice on various channels such partnering with key RTOs and DMOs to offer roaming tourism ambassadors at major attractions and key festivals and events and mobile visitor information services units (e.g., gazebos, tricycles etc.). To enhance the provision of visitor information services virtually, Destination Ontario will continue to pilot virtual travel counselling sessions by offering online bookings and connecting with consumers through the agency's social channels and other platforms. Knowledgeable OTIS staff will continue to provide information services through the province's 1-800-ONTARIO tourism information line to assist consumers with their trip planning process and inspire travel in Ontario.

Destination Ontario will work to ensure a continuum of care by connecting the core delivery channels through a 'Customer Care' tool to manage customer interactions seamlessly across all channels and build a comprehensive knowledge base for OTIS travel counsellors.

Research

Timely and relevant tourism research information is important to marketing strategy, partners and tourism businesses operating in today's competitive travel market. Destination Ontario conducts primary, proprietary tourism-related research and has

access to third-party research. It is Destination Ontario's goal to provide reports with actionable insights that enable the industry to market their products more effectively. Destination Ontario will develop research programs and pilots to bridge the gap between technology and business needs using data analytics to assess processes, determine requirements and deliver data-driven recommendations and reports to executives and stakeholders.

Outputs

- Conduct Travel Intention and Motivator Research Studies in Ontario, Canada, and U.S.
- Conduct Advertising Tracking Research Studies in Ontario, U.S., U.K., and Germany
- Webinars to industry partners presenting research results and insights
- Research reports shared with industry partners

Outcomes

- Actionable research and insights that help the industry improve product and marketing positioning
 - Net promoter score

Key Performance Indicators (where applicable):

- Number of webinars to industry partners presenting research results and insights
- Number of research reports shared with industry partners
- Industry satisfaction survey

Measuring Results

Destination Ontario recognizes that measuring the results from marketing campaigns is important to demonstrate return on investment. The agency plans to use an objectives and key results performance measurement process including several tools such as executive dashboard with key market by market measures, a projection model, campaign measurement plans, and live dashboards and marketing performance analysis.

INITIATIVES INVOLVING THIRD PARTIES

Partnerships are important to Destination Ontario's work and are an element of many of the agency's strategies and tactical executions. Destination Ontario regularly engages with stakeholders with the overarching goal of increasing tourism visitation and spend in Ontario. These collaborative efforts will be vital for the industry's recovery. Destination Ontario will leverage partnerships to extend market reach and generate economic impact for Ontario. Destination Ontario will collaborate with RTOs, DMOs, sector associations, other provincial agencies, and industry colleagues to build and grow ongoing partnerships that are mutually beneficial.

As mentioned previously, the agency will be working with key partners - Destination Canada and Destination Toronto – on a multi-year culinary initiative that all partners are optimistic will support recovery of the specifically hard-hit restaurant sector.

The agency will also work in partnership with the Ontario Heritage Trust for the annual Doors Open program and additionally with the Canada Games 2022 to bring Ontario tourism as part of the Canada Games experience.

INFORMATION TECHNOLOGY/ELECTRONIC SERVICES DELIVERY

Marketing Technology, Websites and Data

Destination Ontario has invested in a refreshed website that launched in May 2021. The goal of this site is to deliver a highly discoverable and engaging experience that motivates potential travellers to action through a visitor-first content strategy. The strategic priorities of the site are:

- Accessibility – in both content and design
- Mobile first – component-based design that put the mobile experience first
- Discoverability –content focused on search engine optimization
- Flexibility –a dedicated in-house team with a flexible content management system to allow the agency to be agile

The end-user experience forms the foundations on which the values of Destination Ontario’s brand are delivered in the digital world. This means that the user interface, ease of use and speed of Destination Ontario’s website must all be optimized. Providing top-quality content and products alone is just not enough in today’s competitive marketplace. Destination Ontario aims to improve the user experience of DestinationOntario.com to remain competitive and brand-relevant in the travel space.

Destination Ontario will develop dedicated region, city, and experience pages that provide detailed trip planning information and proximity-based content that will drive more qualified leads.

Unique visits are essential to Destination Ontario because they represent the number of individuals who visit the website in a particular frame of time. The cost efficiency is more rewarding if it can attract more new users to the website.

Outputs

- Evaluative user experience testing
- User interface enhancements
- Competitive website assessments
- Regularly published data supported content
- Improve site hygiene
- Style guide
- Partner intake process
- Move to a modern image type
- Removing code bulk

- Addressing template issues and page-level optimizations
- Verified travel publisher for media distributors such as apple news, google travel

Outcomes

- Best-ranked user experience website out of the Provincial Marketing Organizations (PMO) for accessing travel information (*No benchmark available, new website.*)
- Increase in website engagement (*No benchmark available, new website.*)
- Increase the monthly number of unique visitors
- 2021 Average monthly visitors (unpaid) = 58,000* (**actual was 57,802*)

Key Performance Indicators (where applicable):

- System usability scale of 80% +
- Web engagement score
- Improve search engine optimization and site health
- Increase traffic through backlinks
- Average ranking among competitor websites
- Superior task completion rates between destinationontario.com and other provincial marketing organization websites
- Decrease in page load times
- Improve internal linking
- Increase in repeat visitors
- Increase in pages per visit
- Rank for pre-selected keywords
- Web traffic concentration = visitors on a page divided by the total site visitors
- Returning visitor metrics (Ontario)
- Disavow bad links
- Number of high-quality backlinks
- Improved domain authority score – benchmark currently at 37

COMMUNICATIONS PLAN

Destination Ontario will actively work to enhance its corporate communications activities. The objective is to deliver a Corporate Communications Strategy for Destination Ontario that will enhance its corporate reputation as a leader of tourism marketing in Ontario, as well as strengthening the agency's engagement with industry stakeholders by providing them with timely, relevant and valuable information for their business.

Destination Ontario will review use of its various communication channels, including social media, its corporate website (destinationontario.com) and e-mail communication to stakeholders. The agency will implement more effective use of communication channels, capitalize on opportunities to engage more, and take a progressive approach towards a strategy that incorporates collaboration and sharing of content of other partners. The goal is to generate awareness of Destination Ontario's activities,

programs, organizational successes, and achievements, while at the same time supporting partners.

Destination Ontario will regularly report its activities and programs through corporate documents such as its Strategic Plan, Business Plan and Annual Report. These documents are posted publicly on the agency’s corporate website (destinationontario.com).

PERFORMANCE MEASURES

Business Plan performance measures are complemented by comprehensive metrics for each activity area that are monitored and reported on a quarterly basis through an output and outcome-based lens.

	2020-21 Actual	2021-22 Goal	2022-23 Goal	2023-24 Goal	2024-25 Goal
Incremental Visitor Spending					
Ontario	\$6.9M ¹	\$37M ²	Goal dependent on approved media spend in table for Ontario. 2022-23 target highlighted in yellow based on current expected media investment of \$5.5M.		
U.S.	N/A ³	N/A ³	Goal dependent on approved media spend in table for U.S. 2022-23 target highlighted in yellow based on current expected media investment of \$2.5M.		

Media Investment	Ontario Incremental Visitor Spend ⁴	U.S. Incremental Visitor Spend ⁴
\$1M	\$25.0M	\$24.3M
\$2M	\$30.0M	\$106.4M
\$2.5M	\$31.5M	\$132.8M
\$3M	\$32.7M	\$154.4M
\$4M	\$34.8M	\$188.5M
\$5M	\$36.3M	\$215M
\$5.5M	\$37.0M	\$226.2M
\$6M	\$37.6M	\$236.5M
\$7M	\$38.7M	\$254.8M
\$8M	\$39.7M	\$270.6M
\$9M	\$40.5M	\$284.5M
\$10M	\$42.2M	\$297M

	2020-21 Actual	2021-22 Goal	2022-23 Goal	2023-24 Goal	2024-25 Goal
Incremental Visitor Spending					
North America and Overseas (via trade channel)	\$0M ³	\$3M ⁶	\$5M ⁷	\$10M ⁷	\$15M ⁷
Media Relations					
Earned Media (Advertising Value Equivalency or AVE)	\$15.8M ⁵	\$5M ⁷	\$20M ⁷	\$30M ⁷	\$40M ⁷
Travel Trade					
Number of Travel Trade Trained	5,201 ⁵	3,500 ⁹	2,500 ⁸	2,500 ⁸	2,500 ⁸
Number of New Products Developed	2 ¹	20 ⁷	20 ⁷	30 ⁸	30 ⁸
Industry Partnerships					
Total Leads to Industry Partners	1.37M ¹	1.23M ³	2.5M ¹⁰	3.3M ¹¹	3.3M ¹¹
Partners' Cash Contribution	\$200,000	\$1.42M ¹¹	\$1.42M ¹¹	\$1.42M ¹¹	\$1.42M ¹¹

¹ Marketing activities were paused throughout the year due to the COVID-19 pandemic and related travel restrictions.

² Goal for Ontario based on a media investment output of \$10M that factors in pandemic impact on travel behaviour with more weighting towards day trips.

³ Due to Canada/U.S./International border closure in 2020-21.

⁴ Goals based on past Ontario and near U.S. ad tracking study incremental visit results and 2018 Statistic Canada's average spend per visit at pre-COVID-19 levels.

⁵ Actuals reflect in-year additional programming in support of industry recovery in the context of COVID-19 that was not anticipated.

⁶ Due to global COVID-19 pandemic and border closures, Joint Marketing Agreements will be mainly focused on trade training, product development and driving bookings for 2022-2023. Target based on an assumption that the borders will reopen for non-essential travel before Q3 2020-2021 – otherwise, Joint Marketing Agreements focused on bookings may not be feasible.

⁷ International activities will be dependent on market readiness factors, including status of COVID-19 in each market, border restrictions, government policy, airline routes, consumer behaviour and community sentiment.

⁸ Returning long-term target to pre-COVID-19 levels and forecasted incremental growth year-over-year where applicable.

⁹ Goals reflect initiatives in support of industry recovery in the context of COVID-19.

¹⁰ Goals reflect writ in summer 2022 and travel indicators suggest Ontarians are looking to travel abroad.

¹¹ Goals reflect current business strategy and budget back to 2018-19 levels and maintain market share.

Definitions:

Incremental Visitor Spending

Incremental Visitor Spending – Ontario and U.S.

Number of trips taken (outcome) by those influenced by the campaign multiplied by the average visitor spend, as measured through the *Brand and Advertising Tracking Study*, conducted by a third-party research supplier.

Incremental Visitor Spending – North America and Overseas (via trade channel)

Estimated direct expenditures (outcome) from travel trade channel bookings. An expenditure based on estimated number of trips booked as a direct result of campaign or joint marketing initiatives with travel trade and conversion partners internationally. Average per person/night pleasure trip expenditure of visitors to Canada as reported by Destination Canada (based on Statistics Canada's International Travel Survey) is applied to the number of nights reported by trade channel partners.

Media Relations

Earned Media (Advertising Value Equivalency or AVE) – The amount in Canadian dollars a similar size story would cost if it appeared as paid advertising at a 1:1 equivalency ratio (outcome), determined by measuring size/length of the story by the advertising rate of the relevant media outlet. The ability to collect AVE may fluctuate year to year impacting final AVE results.

Travel Trade

Number of Travel Trade Trained – Number of tour operator staff and travel agents trained on Ontario tourism products (output) by Destination Ontario or in conjunction with Destination Canada.

Number of New Products Developed – The actual number of packages, itineraries, experiences incorporated (outcome) by trade channel partners (new additional overnight in Ontario, new itinerary, new experiences added to itineraries, etc.).

Industry Partnerships

Total Leads to Industry Partners – Ad clicks or tracked visits to partner websites (outcome):

- From destinationontario.com.
- From ontariostyle.com.
- From Destination Canada partnered initiatives.
- From Destination Ontario-led campaigns or initiatives.

Partners' Cash Contribution Leveraged – The dollar amount of cash that partners provide to Destination Ontario to execute a Destination Ontario-led campaign or initiative (output).

HUMAN RESOURCES

Destination Ontario's Corporate Services will continue to improve workplace practices and performance through implementation of identified efficiencies, training, advisement, and other supports. Corporate Services will also support the Destination Ontario team with new realities due to COVID-19. For example, it will continue to provide guidance, direction, and support as we transition to a hybrid work model. Corporate Services will also be a key team in helping support the fast-moving approvals required to deliver on recovery plans.

As government policies and directives are rarely static, and undergo review and changes on a regular basis, Corporate Services will continue to provide guidance and direction on relevant topics. In addition, process improvement measures continue to be reviewed, updated, and implemented to ensure appropriate control measures and Delegation of Financial Authority is maintained and adhered to with the appropriate supporting documentation. Staff will continue to be encouraged to seek opportunities for learning and development via the Ontario Public Service (OPS)-wide platform

'LearnON', as well as internal developmental opportunities, including knowledge sharing and cross-collaboration across the agency.

Destination Ontario's Management Team continues to be engaged in conversations and activities in order to contribute to a more diverse and equitable OPS as part of the ongoing OPS commitment to anti-racism and Diversity and Inclusion. This includes staying abreast of relevant learning forums and following the guidance and commitment from the Secretary of the Cabinet on related engagements and activities. Further to this, additional anti-racism discussions for all staff continue to be offered with others in development and are expected to be provided to all Destination Ontario staff on an ongoing basis. Destination Ontario has also reinforced its commitment to this initiative by implementing an internal diverse interview panel policy and is actively represented and engaged with the Ministry's Joint-Anti-Racism Working Group. Corporate Services will continue to organize relevant and timely workshops for staff to improve efficiencies and knowledge within the agency and to ensure that all employees are following OPS guidelines and directives as required.

Performance plans will be based on the following priorities:

- Continue to take a visitor first approach as we respond to a recovery and rebuild strategy for COVID-19, and as it is safe to do so, and the time is right inspiring travellers through their passions, interests, and needs. With a focused lens on the strengths of inclusiveness and diversity, showcase Ontario's beautiful landscapes, big cities and charming towns, festivals and events and iconic attractions where visitors can embrace and celebrate culture.
- Continue to work with and lead partners to align and collaborate by leveraging our marketing and assets in all markets. Build alignment and collaborate across the Ministry portfolio including other provincial agencies.
- Continue to develop a holistic research approach, prioritizing how data is used, collected, and analyzed to better understand the visitor and grow visitor visitation, expenditures, and economic impact for Ontario businesses.
- 'Connect, Lead and Inspire' a collaborative approach among staff and partners. Continue to build a culture that is diverse, inclusive, modern, and forward-thinking resulting in a dynamic organization.

RESOURCES NEEDED TO MEET GOALS AND OBJECTIVES

Capital Planning

Destination Ontario works with Ministry staff to identify future capital needs to address infrastructure risks across the capital assets occupied by Destination Ontario.

Destination Ontario conducts Threat Risk Assessments (TRAs) for its OTIC properties to ensure compliance with OPS standards. The 2021 TRAs reported an estimated \$455K in required upgrades to security systems, lighting, and other health & safety initiatives at various OTIC properties.

Destination Ontario works with Infrastructure Ontario (IO), a crown agency of the government of Ontario, to support modernization of the OTICs. The agency will continue to work with IO and the Ministry to identify high-risk health and safety requirements, as well as ways to improve the OTICs through modernization initiatives. .

Operating Budget

Budget line items have been strategically aligned to Destination Ontario's *Roadmap to Recovery Restart Plan* to help Ontario's tourism industry in recovery and rebuild efforts. The budget also reflects the agency's three-year strategic plan and promotes cross-functional teams based on key marketing activities and markets. Savings realized from decommissioning Tourism Consumer Information System have been shifted to Advertising and Marketing to support Destination Ontario's mandate.

FINANCIAL BUDGET AND STAFFING

Financial Budget

DESTINATION ONTARIO

2022-23 THREE YEAR PROPOSED BUDGET

(\$ 000's)

PROGRAM	PRIOR YEAR BUDGET 2021-22	PROJECTED ACTUALS 2021-22	CURRENT BUDGET 2022-23	PROPOSED BUDGET 2023-24	PROPOSED BUDGET 2024-25
Revenue:					
Province of Ontario Grant	33,133	33,087	33,087	33,087	33,087
Advertising Sales	628	530	500	600	600
Travel Information Centres - Sales and rentals	395	200	400	800	800
Trade Promotions	157	-	100	100	100
Interest Income	45	25	25	25	25
Amortization of Deferred Contribution	38	38	26	11	1
	34,396	33,880	34,138	34,623	34,613
Expenses:					
Advertising and Marketing	16,534 ¹	26,039 ^{1,2}	17,008 ¹	16,854 ¹	16,906 ¹
Salaries and Benefits	9,213	9,453	9,595	9,787	9,983
Travel Information Services	3,280	2,748	2,819	3,275	3,341
Technology Operations	2,000	1,088	1,300	1,300	1,300
Marketing Intelligence & Business Strategy	750	667	1,200	1,200	1,200
Partnerships and Sales	825	1,802	1,000	1,000	1,000
Amortization of Capital Assets	514	694	1,015	953	722
Facilities	723	761	768	768 ³	450
Supplies & Equipment	246	246	360	365	371
Board and Committee Expenses	34	10	35	35	35
Audit	27	27	27	27	27
Tourism Consumer Information Systems	250 ⁴	122 ⁴	-	-	-
	34,396	43,657	35,127	35,565	35,334
Net Revenue	-	(9,777) ²	(989)	(942)	(721)
Carryover Funds	-	9,121 ²	-	-	-
Addback Non-Cash Items:					
Amortization of Deferred Contribution	(38)	(38)	(26)	(11)	(1)
Amortization of Capital Assets	514	694	1,015	953	722
Surplus (Deficit)	476	-	-	-	-
Projected FTE Count	84.03	84.03	84.03	84.03	84.03

¹ 1) Ontario; 2) U.S. short-haul/rubber tire [Illinois, Michigan, Minnesota, Wisconsin, Ohio, New York, Pennsylvania, Massachusetts, and District of Columbia]; 3) Manitoba; 4) Quebec; 5) United Kingdom; 6) Germany; 7) France; 8) China 9) Japan; 10) South Korea; 11) Mexico as planned currently, but subject to change.

² The deficiency of revenue in 2021-22 was offset by surplus funds from deferred and/or cancelled marketing activities in late 2020-21 due to COVID-19.

³ Current head office lease expires in June 2023. Facility costs may require adjustments based on results of real estate options analysis conducted by Infrastructure Ontario.

⁴ Reserve fund to pay for transition and termination obligations from decommissioning Tourism Consumer Information System.

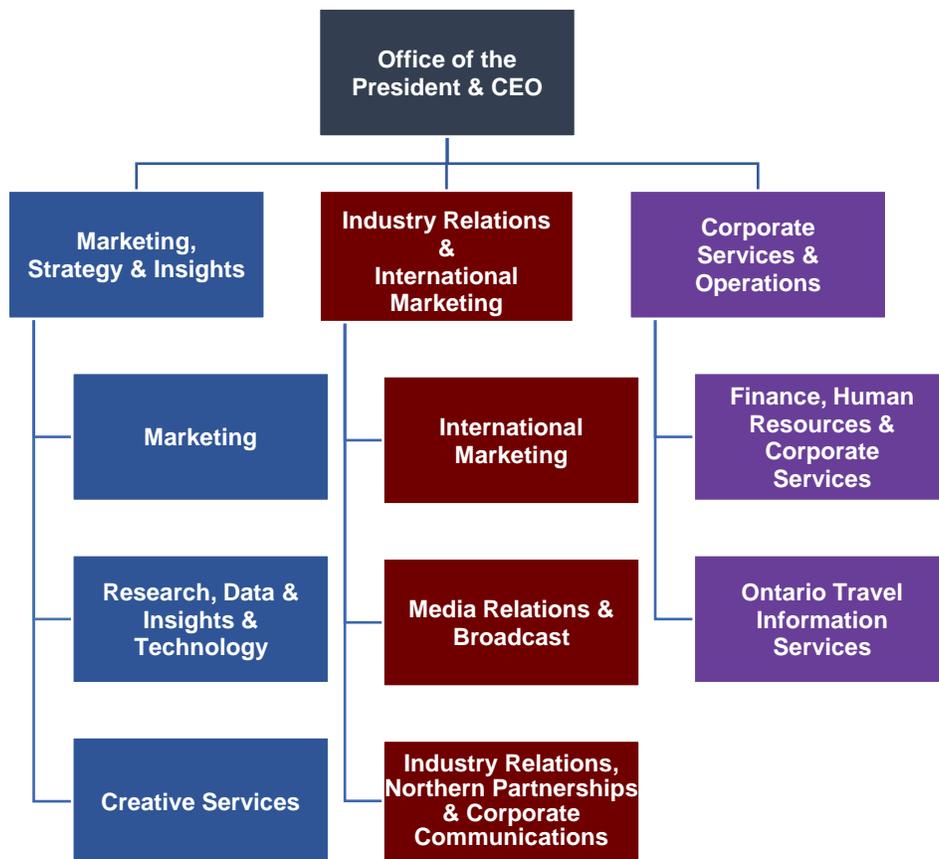
Staffing

Destination Ontario is comprised of 84 Full-Time Equivalents (FTEs) composed of Association of Management, Administrative and Professional Crown Employees (AMAPCEO)-represented positions, Ontario Public Services Employee Union (OPSEU)-represented positions and management positions.

Compensation is negotiated centrally by the provincial government through collective bargaining and management compensation policies.

*Note: Number of FTEs does not include seasonal staff and students employed at the OTICs.

ORGANIZATIONAL CHART



EXPECTED GOVERNMENT APPROVALS

At the time of preparing this document, Destination Ontario is not aware of any expected government approvals, other than what is outlined in this document.

RESPONSE TO THE EXPECTATIONS SET OUT IN THE AGENCY MANDATE LETTER

As per the 2022-23 mandate letter received from the Honourable Lisa MacLeod, Minister of Heritage, Sport, Tourism and Culture Industries, Destination Ontario will support the Ministry's double bottom-line of contributing to the cultural fabric of Ontario and delivering a strong economic impact.

Destination Ontario will take a leadership role to collaborate with tourism stakeholders, including with RTOs, DMOs, sector associations, Destination Canada, and other agencies of the Ministry to deliver a collective brand message in showcasing the province. The agency's multi-phased Roadmap to Recovery marketing plan will continue to guide activities to deliver increased visitation and job creation, and ultimately drive economic growth for tourism's hard-hit sector.

The agency will market awe-inspiring destinations and experiences to Ontarians and visitors from around the world and capitalize on the synergies of heritage, sport, tourism and culture together, aligning efforts to the Ministry's priorities, including those outlined from the 2020 white paper – *Reconnecting Ontarians: Re-emerging as a Global Leader* and the Tourism Economic Recovery Ministerial Task Force. Destination Ontario was pleased to bring forward initiatives and collaboration opportunities through agency roundtables in April and October 2021. Destination Ontario will continue these discussions with the Ministry and sister agencies to support recovery efforts.

The agency will continue to exercise good governance and effective oversight and make improvements wherever possible to ensure value for money to taxpayers. Destination Ontario will work the Ministry to meet the outlined areas of the mandate letter that speak to this, including:

1. Competitiveness, Sustainability and Expenditure Management
2. Transparency and Accountability
3. Risk Management
4. Workforce Management
5. Data Collection
6. Digital Delivery and Customer Service
7. Diversity and Inclusion
8. COVID-19 Recovery

Destination Ontario also recognizes the agency is an agent of the Crown and that it is important to adhere to the guidance outlined in the Memorandum of Understanding (MOU), as well as the Agencies and Appointments Directive. Destination Ontario will continue to work closely with the Ministry in this regard.

Destination Ontario values being a key partner of the Ministry, the Government of Ontario, other governments and agencies and the tourism industry at-large. The agency will help to rebuild the tourism industry consistent with government priorities to help bring it into a period of economic growth that supports the diversity and strength Ontario communities.

RISK IDENTIFICATION, ASSESSMENT AND MITIGATION STRATEGIES

Likelihood Definitions:

Assessment	Level	Description
Rare	1	This event is very unlikely to occur (less than 5% chance).
Unlikely	2	This event is unlikely to occur (5% to 20% chance).
Possibly	3	This event is unlikely, but possible to occur (21% to 50% chance).
Likely	4	This event is very likely to occur (51% to 89% chance).
Almost Certain	5	This event is almost certain to occur (90% or greater chance).

Impact Definitions:

Assessment	Level	Description
Insignificant	1	<ul style="list-style-type: none"> The impact can be absorbed through normal oversight activity with no senior management effort needed. The achievement of objectives will not be impaired. No impact on continuity of operations. No impact on reputation.
Minor	2	<ul style="list-style-type: none"> The impact can be absorbed with minor senior management effort in order to achieve objectives. Minimal impact on continuity of operations. Minimal impact on reputation.
Moderate	3	<ul style="list-style-type: none"> The impact can be endured with active senior management effort in order to achieve the objectives. Continuity of operations is somewhat affected. Reputation is somewhat impacted.
High	4	<ul style="list-style-type: none"> The impact can be endured with active and ongoing senior management effort and may impair the ability to meet objectives. Continuity of operations is visibly affected. Reputation is visibly impacted.
Very High	5	<ul style="list-style-type: none"> The impact, even with senior management effort, will most likely lead to long-term or permanent damage to the ability of meeting objectives. Continuity of operations is significantly impaired. Reputation is significantly impacted.

Risk Rating = Likelihood x Impact

Level	Score	Description
High	20+	Significant management attention required.
Medium – High	11-19	Ongoing management review and discussion is necessary.
Medium	7-10	Limited management review required.
Low	1-6	Risk can be managed through existing oversight/routine procedures.

Objective	Risk Statement	Risk Category	Existing Controls	Likelihood	Impact	Risk Rating	Mitigation Strategies
Maximize return on investment of marketing activities and reach consumers who can travel to Ontario	Due to external/ environmental factors and global events (i.e. pandemic), there may be a negative impact on global travel patterns.	Delivery / Operational - Environmental	Destination Ontario employs a balanced portfolio approach to international marketing, focusing on a number of markets of greatest opportunity for return on investment. This means risk is spread out across source markets.	Likely - 4	High - 4	Medium - High	Destination Ontario has some program flexibility to shift strategy according to current conditions. Depending on the issue/event, there would still be an impact to results due to change to or even pause of destination marketing.

<p>Align with the government's provincial reopening framework and public health guidelines to appropriately determine timing and reach of marketing efforts.</p>	<p>Coming out of the global COVID-19 pandemic there will be difficulty in determining suitable timing for tourism and travel related marketing activities. Destination Ontario is dependent upon broader government direction on timing and will need to align to current health and safety guidelines.</p> <p>Initiating tourism marketing efforts will be guided by public health direction and both traveler's behaviour data, and market research about tourism and acceptance to inbound travellers to their communities.</p>	<p>Delivery / Operational - Environmental</p>	<p>Destination Ontario will ensure marketing collateral educates travellers on safety guidelines while travelling.</p> <p>Marketing focus aligns with government guidelines of travel. i.e. encouraging localized travel, regional travel, national or international travel.</p>	<p>Possibly - 3</p>	<p>High - 4</p>	<p>Medium - High</p>	<p>Destination Ontario will follow closely direction of health authorities, all levels of government, industry partners and leading research organizations, to get the most current and expert data related to how COVID-19 is impacting travel and the tourism industry not only in Ontario but worldwide.</p> <p>Where media is purchased and conditions change to be unfavourable to promote travel, Destination Ontario will work with centre government partners to mitigate bought media cancellation fees through reallocation of bought media to programs that could more appropriately use the media (e.g. Ministry of Health, OMAFRA, other), with the intent to have no net negative impact on taxpayer funds.</p>
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<p>Ensure the safety of electronic data for all Destination Ontario's website users</p>	<p>Destination Ontario's web presence exposes it to cyber-attack and external privacy breach.</p>	<p>Delivery / Operational - Technology</p>	<p>All data is encrypted, and monitoring and logging is in place to allow for visibility into the solutions security and access posture. Permissions are assigned using the least privileged principle.</p> <p>Application components and packages are routinely scanned for possible vulnerabilities. All endpoints are accessed through HTTPS.</p>	<p>Possibly - 3</p>	<p>Moderate - 3</p>	<p>Medium</p>	<p>Any new technology developed is reviewed by Provincial Government Privacy Impact Specialists; and revisions are made based on their recommendation.</p> <p>The applications are designed and deployed within tier architecture for a logical separation of web and app/data components for better security control.</p>
<p>Ensure the continuity of Destination Ontario's operations when access to physical office(s) are restricted.</p>	<p>COVID-19 crisis is putting a strain on technology (e.g. internet, social media) and there is a potential for negatively impacting project development and implementation.</p>	<p>Delivery / Operational - Technology</p>	<p>Destination Ontario has simplified access to its remote-work services to ensure staff can perform the duties and responsibilities necessary to continue the organization's essential functions during any type of threat or emergency from a telework location, including the introduction of more cloud-based services such as SharePoint, Google Data Studio, etc.</p>	<p>Unlikely - 2</p>	<p>High - 4</p>	<p>Medium</p>	<p>Destination Ontario Corporate Services and HR work with staff and management to identify gaps and subsequent technology solutions.</p> <p>Destination Ontario takes a continuous improvement approach and regularly reviews its equipment, technology, and technical support and ensures they are regularly tested and upgraded when appropriate.</p>

<p>Deliver Destination Ontario programs on time and on budget and regularly communicate with partners and stakeholder to avoid surprises.</p>	<p>Delays in programming approvals, may result in a negative impact on stakeholder relations.</p>	<p>Delivery / Operational - Timeline</p>	<p>All projects have developed critical paths that partners are consulted on as much as possible. Regular communications exist with Ministry on key initiatives. Project management discipline is applied to project deliverables.</p> <p>Where ministry or intra-ministry concurrence is required, Destination Ontario works with Agency Relations and Accountability Office to secure concurrence.</p>	<p>Possibly - 3</p>	<p>Moderate - 3</p>	<p>Medium</p>	<p>Where issues are identified, stakeholder management strategies are engaged so that partners are up to date on government direction.</p> <p>Despite best efforts in terms of communication and outreach, some stakeholders will remain dissatisfied if projects are discontinued, and direction does not align with business needs/business planning timelines.</p>
<p>Measure and monitor Key Performance Indicators that are specific, measurable, achievable, realistic, and timely.</p>	<p>Ineffective or inappropriate performance measures can negatively impact program management and results.</p> <p>Without the appropriate investment and funding, the organizations' Key Performance Indicators (KPI's) are at risk.</p>	<p>Delivery / Operational - Information</p>	<p>A dedicated marketing metrics team reviews and provides direction on performance measurement, setting targets and reporting tools.</p> <p>Destination Ontario conducts stakeholder surveys, monitors, and responds to comments throughout the year. A performance dashboard is completed for all campaigns.</p>	<p>Possibly – 3</p>	<p>Moderate – 3</p>	<p>Medium</p>	<p>Destination Ontario Management works with its Digital Strategy and Data & Analytics Teams to assess marketing for effectiveness and efficiency. KPIs are reviewed regularly for currency and effectiveness. Where appropriate, new measures are added and less effective measures are discontinued.</p>

<p>Deliver impactful marketing campaigns.</p>	<p>Uncertainty on the performance of marketing activities designed to carry out recovery of the tourism sector as data on the impact to the economy, public attitude and behaviour studies on travel is evolving and dependent on the fallout, length and severity of the pandemic.</p> <p>Travel behaviour may be more difficult to influence due to economic insecurity and fear of contracting COVID-19.</p>	<p>Delivery / Operational - Environment</p>	<p>Destination Ontario works with its Agency of Record for marketing and creative services to develop research insights informed impactful marketing campaigns. Destination Ontario's contract with its current Agency of Record has been extended to the latest allowable date.</p> <p>Destination Ontario works with its Agency of Record for media planning and buying services to balance audience reach with scale of media buy budget.</p> <p>Destination Ontario uses a collaborative approach with the Ministry and industry as a whole: Management works with internal and external clients to best deliver on ministry direction and its corporate mandate.</p>	<p>Possibly - 3</p>	<p>Moderate - 3</p>	<p>Medium</p>	<p>To better understand the impact of COVID-19 on the economy, the changing consumer mindset and to inform marketing recovery strategies Destination Ontario consults various on-going proprietary tracking studies on consumer attitude and behaviour, specific to the COVID-19 pandemic.</p> <p>If approval to procure marketing and creative services vendors is delayed or not obtained, Destination Ontario will need to procure for these services on a campaign-by-campaign basis over the short-term, per the agency's current Delegation of Financial Management Authority.</p>
<p>Deliver effective marketing activities while complying with OPS I&IT standards.</p>	<p>Inability to function effectively due to strict OPS I&IT standards created for protecting government and personal information.</p>	<p>Delivery / Operational - Technology</p>	<p>Destination Ontario seeks supplementary I&IT approval and exemption for access to OPS restricted applications to proceed with and optimize required marketing business activities.</p>	<p>Possibly - 3</p>	<p>Minor - 2</p>	<p>Low</p>	<p>Where barriers are identified, Destination Ontario works with Ministry colleagues to enhance permissions for digital marketing and data collection.</p>

Effectively procure and enter into agreements with vendors/suppliers to support delivery of Destination Ontario mandate.	Inability to enter into agreements for purposes of planning, measuring, analyzing, and purchasing online advertising space on digital and social media platforms due to the agreements having clauses that increase Destination Ontario's contingent liabilities or indebtedness.	Policy - Policy Direction	The costs related to the contingent liabilities cannot be quantified or estimated at this time; however, the overall risk of any liability materializing as a result of this request is low.	Unlikely - 2	Minor -2	Low	Destination Ontario worked with the Ministry and Treasury Board to secure a Section 28 approval under the Financial Administration Act ("FAA"). This ensures continued compliance with the FAA while entering into contracts that include clauses with contingent liabilities.
Evolve and modernize Destination Ontario marketing activities to utilize the most up to date technological advances.	Reluctance from industry stakeholders and partners as we change and evolve to using new marketing technologies.	Delivery / Operational - Technology	Destination Ontario has regular communication with key stakeholders like RTOs, DMOs and sector associations	Unlikely - 2	Minor -2	Low	Destination Ontario provides support and guidance by means of education and licencing tools to support and enhance digital growth to its industry partners.

<p>Attract and retain best-qualified staff to effectively deliver Destination Ontario's mandate.</p>	<p>Due to Bargaining Unit (Union), salary caps, fixed headcounts (FTEs) and Ontario Public Service hiring restraints, challenges exist in creating an organization that is structured to meet evolving needs of a marketing organization which includes attracting and retaining the best-qualified staff in a dynamic marketing and media environment. This may result in lower staff morale and less confidence from stakeholders.</p>	<p>Delivery / Operational - Human Resources</p>	<p>Destination Ontario Corporate Services has in-house HR services and liaises with key Ministry partners to ensure agency needs are met in a timely manner, in addition to providing direct staff support and counseling.</p>	<p>Possibly - 3</p>	<p>Moderate - 3</p>	<p>Medium</p>	<p>Ontario Shared Services, HR Advisory Services and Labour Relations provides enterprise-wide HR advice and services that enable the achievement of government priorities and business objectives by promoting strategies and practices for building an engaged and productive workforce.</p> <p>The Ministry's dedicated Strategic Business Unit (SBU) provides Destination Ontario senior executives with advice, plan, and broker services to support attraction and retention of diverse talent, build capacity to sustain a world class organization and engage employees to achieve results.</p>
<p>Maximize value for money and return on investment of marketing activities within allocated budget.</p>	<p>Insufficient budget to execute effective campaigns due to constrained annual allocation.</p>	<p>Financial - Forecast</p>	<p>Destination Ontario management works with a media planning and buying service to balance audience reach with scale of media buy budget. There would still be an impact on results and would be relative to budget shortfall.</p>	<p>Almost Certain - 5</p>	<p>High - 4</p>	<p>High</p>	<p>Destination Ontario undertakes a value for money assessment of all business lines as part of annual operational planning.</p> <p>Potential marketing investment reduction in some or all markets.</p> <p><i>(other jurisdictions have increased their budget)</i></p>
<p>Strategically balance types of media buys to maximize highest return on investment.</p>	<p>Higher media buying and production costs in traditional, yet effective, media channels such as TV.</p>	<p>Financial - Market</p>	<p>Destination Ontario management works with its media planning and buying service provider to balance audience reach with scale of media buy budget, however, Ontario's tourism profile is reduced.</p>	<p>Likely - 4</p>	<p>Moderate - 3</p>	<p>Medium - High</p>	<p>Destination Ontario strategically targets markets of highest return, allowing for a focused approach.</p>

Work with internal and external clients and deliver on Ministry direction and corporate mandate.	The risk of direction change for Destination Ontario due to reframing of the Ministry's tourism priorities..	Policy - Policy direction	Collaborative approach with the Ministry and tourism industry as a whole: Management works with internal and external clients to best deliver on Ministry direction and its corporate mandate.	Likely - 4	Moderate - 3	Medium - High	Destination Ontario continues to work with the Ministry to ensure that marketing initiatives are adjusted and correctly aligned.
Deliver effective COVID-19 tourism recovery marketing.	Uncertainty of the outcomes of government response to COVID-19 and the impact on tourism.	Policy - Outcomes	Collaborative approach with the Ministry and tourism industry on COVID-19 response	Possibly - 3	High - 4	Medium - High	Destination Ontario's recovery activities are designed with maximum flexibility to appropriately adapt and complement other government (federal, provincial, municipal) initiatives that are being delivered in parallel.
Maintain positive public perception and maintain stakeholder satisfaction.	Falling stakeholder satisfaction and failure to meet the expectations of the public, other governments, ministries, or tourism industry stakeholders will negatively impact government's and Destination Ontario's reputation.	Public Perception / Stakeholder - Reputation	Destination Ontario has regular communication with key stakeholders like RTOs, DMOs and sector associations	Possibly - 3	High - 4	Medium - High	Collaborative approach: Staff regularly interact with stakeholders to learn and share industry intelligence. Industry stakeholders are surveyed, and responses analyzed to address issues through Destination Ontario programming and/or communications activities. Stakeholders are notified of changes to operations or programs.
Maintain positive social media presence.	Social media presence exposes Destination Ontario to negative external comments or inadvertent misuse by staff leading to public embarrassment.	Public Perception / Stakeholder - Reputation	Clear guidelines are posted for public and staff and social media is monitored on a regular basis and posts that do not meet the guidelines are removed.	Possibly - 3	Moderate - 3	Medium	Destination Ontario works with the Ministry's Communications team when potential public issues are identified to proactively address potential issues.

<p>Understand public attitudes and behaviours in Canada and other countries to inform strategic and tactical planning.</p>	<p>COVID-19 has seen a significant negative economic impact causing noticeable changes in public behaviour and Canadians are worried about their finances, job prospects, and are delaying major purchases including travel.</p> <p>Community sentiment toward tourism visitation may be low.</p>	<p>Public Perception / Stakeholder - Performance</p>	<p>Destination Ontario is using proprietary market research tracking to understand public attitudes and behaviours in Canada and other countries to inform strategic and tactical planning.</p>	<p>Likely - 4</p>	<p>Moderate - 3</p>	<p>Medium - High</p>	<p>Destination Ontario has program flexibility to shift strategy and adjust marketing tactics to address environmental conditions.</p>
<p>Ensure Ontario brand “Ontario Yours to Discover” is appropriately promoted by DMO’s.</p>	<p>Risk posed by programmatic media buys by DMOs who use “Ontario Yours to Discover” when inadvertently purchasing ad placement on websites with controversial content may pose an attribution risk to the Ontario brand and Destination Ontario’s reputation.</p>	<p>Public Perception / Stakeholder - Reputation</p>	<p>Destination Ontario assists and advises tourism stakeholders on how to minimize risk when buying programmatic ads.</p>	<p>Possibly - 3</p>	<p>Moderate - 3</p>	<p>Medium</p>	<p>Destination Ontario works with the Ministry Communications team when potential public issues are identified to proactively address potential issues.</p>
<p>Provide timely reporting to the Ministry</p>	<p>Failure to meet deadlines and requirements could contravene regulations and directives.</p>	<p>Governance / Accountability - Controllership / Compliance</p>	<p>Collaborative approach with the Ministry and tourism industry on COVID-19 response</p>	<p>Unlikely - 2</p>	<p>High - 4</p>	<p>Medium</p>	<p>Destination Ontario works with the Ministry to meet timelines and reporting criteria.</p>

<p>Comply with OPS policies and directives</p>	<p>Non-compliance with established policies and directives may result in issues for: financial accounting, employee relations, accountability requirements, and reflect negatively on the organization.</p>	<p>Governance / Accountability - Controllership / Compliance</p>	<p>Management reviews risk, quarterly management report and year-end and in-year audits. The Audit Finance and Risk Committee of the Board of Directors reviews the Management Report on a quarterly basis to review policies on internal control and to assure itself that appropriate processes are functioning effectively, monitor the risks to which the organization is exposed and that internal control is effective in managing risks to an acceptable level.</p>	<p>Unlikely - 2</p>	<p>Moderate - 3</p>	<p>Low</p>	<p>Corporate Services continues to educate all Destination Ontario staff by means of 1:1 trainings, attendance and regular unit meeting and mandatory workshops on financial processes and business processes.</p> <p>Contract Management and OPS Legal review all new agreements to minimize risks and ensure maximum accountability.</p> <p>Destination Ontario reviews all the results of internal control assessments (including, where applicable, those related to outsourced services, reports from their internal audit function, the management letter of recommendations from its external auditor and any reports by the Auditor General) for identified deficiencies and takes appropriate actions to address these deficiencies.</p>
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<p>Address and implement recommendations from external reviews</p>	<p>Negative attention from stakeholders due to failure to address the recommendations of external reviews (public servant expense claim audits, mandate reviews).</p>	<p>Governance / Accountability - Controllership / Compliance</p>	<p>Board appointees receive Public Appointments Secretariat training on governance and accountability for public boards. Board and staff expenses are carefully reviewed for proper documentation and compliance with directives and Destination Ontario expense claim policy. Training is provided as needed.</p> <p>Mandate review recommendations are implemented as and when appropriate.</p>	<p>Unlikely - 2</p>	<p>Moderate - 3</p>	<p>Low</p>	<p>Destination Ontario takes a proactive approach in addressing and documenting Board and staff expense claims.</p> <p>Destination Ontario works with Ministry colleagues to address any recommendations coming out of reviews.</p>
<p>Secure funding for capital needs at Destination Ontario offices while maximizing marketing budget</p>	<p>Capital upgrades are not undertaken because premises are leased. Historically, capital needs have been limited and no capital funding has traditionally been provided to Destination Ontario.</p>	<p>Delivery / Operational - Infrastructure</p>	<p>All Destination Ontario property arrangements continue to be managed by Infrastructure Ontario.</p> <p>Where substantial capital needs are identified, Destination Ontario works with the Ministry to apply for incremental funding through the Treasury Board.</p>	<p>Likely - 4</p>	<p>Moderate - 3</p>	<p>Medium - High</p>	<p>Threat Risk Assessments (TRAs) are undertaken under the guidance of Infrastructure Ontario. Identified threat risks are mitigated as appropriate through capital repairs and or adjustments to premises.</p> <p>Capital funding for leasehold improvements will continue to depend on availability of funds from the Ministry. Due to the limited availability of funding, the Ministry prioritizes capital investments in projects that are considered currently critical (health and safety), that address code and legislation compliance, and that are considered at risk of imminent breakdown.</p>