

DESTINATION ONTARIO

An Agency of the Government of Ontario

BUSINESS PLAN

2023-2024

**DESTINATION ONTARIO
BUSINESS PLAN 2023-2024**

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TABLE OF CONTENTS	PAGE
Executive Summary	3
Mandate	4
Environmental Scan	5
Strategic Directions	6
Organizational Overview	8
Implementation Plan	12
Initiatives Involving Third Parties	28
Communications Plan	28
Performance Measures	29
Human Resources	32
Resources Needed to Meet Goals and Objectives	33
Financial Budget and Staffing	34
Organizational Chart	36
Expected Government Approvals	36
Response to the Expectations Set Out in the Agency Mandate Letter	36
Risk Identification, Assessment and Mitigation Strategies	38

EXECUTIVE SUMMARY

Destination Ontario's Business Plan for 2023-24 reflects the continued delivery of strategic marketing programs and activities to support the tourism industry's recovery from the significant impact of the COVID-19 pandemic. Coming out of the pandemic, it is more than ever important to market Ontario to increase visitation and incremental spending using the agency's mandate as our guiding principle to support jobs and the economy of Ontario. While travel is beginning to rebound, we are mindful of inflation, recession and emerging variant concerns that could impact revenue in 2023-24. Marketing campaigns deliver revenue generation and direct leads for tourism businesses. Destination Ontario's 2023-24 plan will thoughtfully execute marketing activities to deliver results for the industry that bring in millions to Ontario's economy.

Destination Ontario will work closely with the Ministry of Tourism, Culture and Sport (Ministry) to support Ministry priorities and align efforts. Destination Ontario will work collaboratively with the industry, including Destination Canada, Regional Tourism Organizations (RTOs), Destination Marketing Organizations (DMOs), sector associations, and other key tourism partners to maximize marketing recovery efforts to yield the highest potential for the incremental economic impact that promote, drive and deliver tourism revenues and employment back to businesses across the province. Destination Ontario will work with the Ministry to plan for and to capitalize on big events, such as FIFA World Cup, 2026 and leverage the influx of international attention on Toronto and other FIFA designated host North American cities.

Destination Ontario will rely on its strategic playbook, while working on developing a new three-year strategic plan, using its corporate priorities as the backbone to focus on key areas, including Collaboration, Modernization, Research, and Growth, to guide the agency's marketing strategies to support increased visitation and generate expenditures. Destination Ontario recognizes that pre-COVID-19 visitation and spending levels may take some time to rebuild. Therefore, Destination Ontario's new three-year strategic plan will refresh and validate the organization's direction in this environment.

Destination Ontario is competing with provincial and international marketing organizations that have larger budgets. Destination Ontario given budget of \$32.9M is prepared to strategically invest in key markets that will generate the strongest return on investment.

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.

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. While travel is beginning to rebound, there are inflation, recession and emerging variant concerns that could impact revenue in 2023-24 as tourism recovery is tied to these external / environmental factors and global events. Coming out of the global COVID-19 pandemic, Destination Ontario is dependent upon broader government direction on timing for tourism and travel related marketing activities. Destination Ontario's activities and plans will continue to be informed by the latest evolving available data and trends.

The following points highlight the current environment:

Tourism Forecasted Outcomes

- In Spring 2022, Destination Canada outlined four forecasted recovery scenarios for Canada:¹
 1. Upside scenario: Revenue in 2022 is forecasted to be \$86.8B with the expectation of recovery to 2019 levels by 2024
 2. Expected scenario: Revenue in 2022 is forecasted to be \$79.9B with the expectation of recovery to 2019 levels by 2025
 3. Downside scenario: Revenue in 2022 is forecasted to be \$80.6B with the expectation of recovery to 2019 levels by 2025
 4. Severe scenario: Revenue in 2022 is forecasted to be \$81.0B with the expectation of recovery to 2019 levels by 2026

Tourism 2022 Status

According to Destination Canada's Q2 2022 Tourism Snapshot report:²

- Tourism spend progressed to 72% of its 2019 levels, up from 68% over Q4 2021
- International receipts fell to 38% in Q1 2022. Down 40% from the previous quarter

According to Statistics Canada's Ontario border crossing July 2022 report^[1]

- All key international markets in July 2022 surpassed July 2021 levels
- Border crossing would need to increase an average of 45% to reach June 2019 levels

Travel Confidence & Intent

According to Destination Canada's Sentiment July 2022 report:³

- 78% of Canadians welcome visitors from other parts of Canada
- 59% of Canadians welcome travellers from the United States
- 59% of Canadians welcome travellers from other countries

¹ Destination Canada, Tourism Outlook Spring 2022

Statistics Canada, tables 24-10-0050-01 Non-resident visitors entering Canada by country of residence 2019- July 2022

² Statistics Canada, National Tourism Indicators, Q1 2022

^[1] Statistics Canada, tables 24-10-0050-01 Non-resident visitors entering Canada by country of residence 2019- July 2022

³ Destination Canada, COVID-19 Resident Sentiment July 2022

According to Destination Analysts' June 2022 report:⁴

- 85% of U.S. travellers are ready to travel
- 17% selected Canada as the most desired foreign destination in the next 12 months
- 41% will likely take a trip to Canada in the next 9 months
 - 26% taking a trip to Canada will likely visit Ontario

Ontario Resident Sentiment:

According to Destination Canada's resident sentiment survey from October 2022, Ontario has been on a continuous upward trend since February 2021 in levels of welcoming visitors⁵.

- 70% of Ontarians likely to travel within Ontario in the next 9 months
- 20% of Alberta residents likely to travel to Ontario in the next 9 months
- 23% of Manitoba residents likely to travel to Ontario in the next 9 months
- 27% of Quebec residents likely to travel to Ontario in the next 9 months
- 31% of Newfoundland & Labrador residents likely to travel to Ontario in the next 9 months
- 86% of Ontarians feel safe to travel within Ontario
- 80% of Ontarians feel safe to travel to other provinces
- 44% of Ontarians feel safe to travel to the U.S
- 45% of Ontarians feel safe to travel internationally.

STRATEGIC DIRECTIONS

The *Strategic Playbook 2018-2021* outlines Destination Ontario's corporate priorities and key objectives that continue to guide the organization. Destination Ontario will achieve its goals by focusing on Collaboration, Modernization, Research, and Growth to support marketing and partnership efforts to 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

⁴ Destination Analysts, The State of the American Traveller, June 15-23, 2022

⁵ Destination Canada Resident Sentiment Survey Report, October 2022, N~1,900 adult Canadians, N=~600 for Ontario and each minimum N=200 for each province

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 collaborate with industry partners and lead 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 analyzed 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 as an agency by focusing on activities with strong value-for-money evaluation practices, campaign performance and insights.

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.

ORGANIZATIONAL OVERVIEW

Destination Ontario's Business Plan for 2023-24 is focused on strategic activities and programs to not only help Ontario's tourism industry continue to recover from the challenging past years related to COVID-19 but also deliver impactful marketing that maximizes performance results. The tourism industry has been significantly affected. Given that the impacts from the pandemic continue the tourism industry and may take several years to return to pre-pandemic levels, Destination Ontario will continue to find ways to maximize value for money and return on investment of marketing activities within its allocated budget. Destination Ontario will make in-year adjustments as needed to address changes affecting travel, shifting target markets, 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 agency goals, objectives, and strategic direction with government priorities and direction, including those outlined in the 2023-24 Mandate Letter. The agency will remain focused on opportunities to assist stakeholders to recover and rebuild.

As the lead provincial tourism marketing organization, Destination Ontario will continue to focus on collaborating with tourism stakeholders through its marketing efforts. Destination Ontario will continue to be guided by the agency's Strategic Playbook and focus on some key areas, including Research, Collaboration, Modernization, and Growth, to guide the agency's marketing strategies to support increased visitation and expenditures. The agency will build strategic plans to showcase Ontario as a safe and beautiful travel destination to key markets in Canada, the U.S. and internationally. Driving economic impact and achieving direct results for the province's tourism industry will remain a top priority.

Thoughtful, coordinated marketing efforts with all stakeholders, (e.g., RTOs, DMOs, Associations, Private Sector) will be critical due to the landscape of global tourism competitiveness becoming fierce as destinations market themselves aggressively. 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 to spend their tourism dollars in Ontario.

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 Tourism, Culture and Sport. Board members are public appointments by the Ontario 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's goals, objectives, and strategic direction continue to align with the government's priorities and direction.

Corporate Services

The Corporate Services team oversees business operations, financial management, procurement and contract management, human resources, 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.

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 and developed in 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 updated with inspirational content in 2023-24.

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

Destination Ontario's integrated marketing communications efforts in 2023-24 will build on the success of 2022-23 collaborative campaigns.

In Ontario, Destination Ontario will continue to build on the marketing system developed with partners, RTOs, DMOs, sector associations and individual tourism operators, across three seasonal campaigns encouraging overnight domestic travel. This marketing system allows destination partners to align their regional priorities with DO's marketing campaigns and consumer insights.

The agency will continue to prioritize the U.S. market as a key driver to incremental revenue into the province partnering with gateway cities and regional partners to encourage U.S. drive and fly markets to Ontario to drive increased visitation and expenditures within/to Ontario. DO will also look to broaden its marketing efforts into other Canadian regions with the highest potential.

Northern Ontario

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. With now fully open borders, Destination Ontario's northern marketing programs and activities will continue to focus 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 and Public Relations / Broadcast Program

Destination Ontario's earned media team promotes the province as a must-see travel destination through media relations, tourism promotions, and consumer activations. Working closely with journalists, editors, influencers, radio, and television producers, Destination Ontario generates positive earned media coverage to inform and inspire travel.

Cornerstones of Destination Ontario's strategy in both the domestic and international markets are proactively pitching tailored story ideas; planning/executing press trips for target media on assignment; and participating in media shows, marketplaces, and events.

Destination Ontario's Broadcast Program is unique to Destination Ontario, supporting its mandate to market Ontario as a preferred tourism destination by bringing the province's products, experiences, attractions, and local tourism businesses to life on radio and television.

Destination Ontario's media and public relations team works in close collaboration with Destination Canada, RTOs, DMOs, sector associations and tour operators to promote the province.

International

The international traveller is important to Ontario's tourism economy as they typically stay longer and spend more than a domestic visitor. In 2019, international travellers accounted for 2.8% of visits to Ontario, and contributed 19.8% of overall visitor expenditures.

International leisure travel continues to resume in phases, and competition for travellers is fierce. Destination Ontario will continue to use an integrated approach to ensure that international travellers choose Ontario:

- **Business Development** – Working closely with travel companies (tour operators, wholesalers, and travel agents) to increase awareness of the province and drive sales of Ontario's market-ready tourism products and experiences
- **Media and Public Relations** – Working closely with media (journalists, editors, and influencers) to garner positive third-party editorial coverage to increase awareness of the province and inspire travel to Ontario
- **Consumer Marketing** – promoting Ontario directly to consumer through digital and social tactics to drive awareness, consideration, and travel intent for Ontario spending

2023-2024 international markets of priority are the United Kingdom, Germany, France, Japan, China, South Korea, Mexico, and Australia.

Destination Ontario collaborates with RTOs, DMOs, sector associations, Ministry sister agencies, Destination Canada, and in-market agencies to support the industry.

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 travel advice to visitors through various channels, in-person, on the phone, by email or virtually. Destination Ontario's knowledgeable travel counsellors offer personalized trip planning to help visitors to discover the variety of experiences available in Ontario.

Destination Ontario continues to evolve its OTIS through strategic modernization initiatives and a 'Visitor Care' approach to enhance the delivery of tourism information services to visitors and industry beyond the traditional bricks-and-mortar model.

IMPLEMENTATION PLAN

In 2023-24, 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.

In addition to supporting the collective recovery from the global pandemic and enabling the tourism and culture sectors to return to and exceed pre-pandemic levels of activity, Destination Ontario will demonstrate excellence in program and service delivery by supporting the growth of tourism economic activity across the province while continuing to implement data-informed marketing strategies to attract visitors to Ontario.

Destination Ontario's goals, objectives, and strategic direction continue to align with the government's priorities and direction. 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. Destination Ontario will collaborate with other agencies, ministry partners, stakeholders, and communities to drive efficient innovation across all lines of business.

Marketing

The impact of COVID-19, inflation and labour challenges continue to impact the tourism sector, however, consumer interest and travel to Ontario garnered from 2022-23 campaigns have shown positive results and strong indicators of interest and intent. In 2022-23, Destination Ontario continued with seasonal campaigns for the Ontario Market and broadened its efforts to two key partnered campaigns in the U.S. drive markets driving over 3 million leads to gateway city partners. Building on the successes of 2022-23, market plans for 2023-24 are being anchored in strong travel intention research, the latest market intelligence and learnings from 2022-23's campaigns and partnerships. Destination Ontario will develop its marketing activities based on strong strategies, effective media planning and impactful creative storytelling to generate incremental visitation and 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
- become a centre of excellence supporting provincial marketing
- lead the marketing of Ontario as a travel destination nationally and internationally
- work with regional organizations to market travel within Ontario

Implementation plans for Ontario (including the Northern Ontario program), Canada, U.S., and International markets are detailed in this business plan. The projected overarching goals for 2023-24 based on a media spend of \$8.8M are:

- Generate 764K in incremental visits and \$243.6M in incremental expenditures
- Generate 8.9M leads from all markets and tactics

Ontario Market

The annual plan for the Ontario market focuses on seasonality and avid product experiences to encourage Ontarians to plan a getaway in Ontario. This plan is anchored by a collaborative, partnerable marketing system that leverages partner content and connects consumers with trip ideas and operators. As Ontario is a beautiful four-season

destination, campaigns in fall and winter will help to drive incremental yield during shoulder season and support dispersion efforts in the spring/summer season aligned with partner priorities.

Outputs

- Spring/summer, fall and winter domestic campaigns
- Partnered marketing system profiling partner content and operators

Outcomes

- Increase in visits and visitor spend in Ontario from Ontarians
- Targets:
 - Generate 221K in incremental visitation and \$31.4M in incremental Expenditures
 - Generate 3.2M leads to industry

Targets for visits and spend are projected against media investment of \$2.4M media spend and past advertising campaign performance data. In comparison to 2022-23, media investment was \$3.6M. We are working to be more efficient in the market with comparable lead targets.

Key Performance Indicators (where applicable):

- Increase in Ontario travel overnight intention
- Increase in trip frequency
- Increase in seasonal trip planning information seeking
- Web engagement score
- Social Content Advocacy and Audience Growth Rate
- Media cost per lead
- Campaign performance measures (e.g., Click Through Rate (CTR), Cost Per Click (CPC))

Canada Market

Destination Ontario plans to target key Canadian drive and fly markets that research shows as markets of highest potential. Visitation data shows that Ontario receives about seven million visits from Canadian provinces per 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.

Destination Ontario will target Manitoba, Quebec, and the Atlantic provinces with a content market strategy to better understand the motivators of these travellers and drive leads to destination partners. These markets will continue to be evaluated over time to ensure higher-yield target traveller market availability and potential marketing programs with Destination Canada.

⁶ Statistics Canada, Visitor Travel Survey, 2018

Outputs

- Content campaigns in key drive and fly market provinces

Outcomes

- Generate 144K leads to industry

United States Market

The spring and fall U.S. drive campaigns in 2022-23 generated positive outcomes for Destination Ontario and its partners, including generating over 3M leads to partners. These campaign learnings coupled with Destination Ontario travel intention research, credit card spending data and Google search insights informed markets of highest potential for 2023-24 planning. 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 drive markets followed by a focus on key fly markets. Destination Ontario, working with partners, will focus on a tiered approach to U.S. markets in 2023-24. Tier One will target drive markets of Michigan, Northern Ohio and New York State. Tier Two will target high value fly markets of New York City and Chicago. Tier Three will target California with a pilot working with Destination Canada.

Northern markets and avid interests (fishing, hunting, snowmobiling, motorcycling) 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 U.S. markets
- Partnered campaigns leveraging partner content

Outcomes

- Generate 543K in incremental visitation and \$212.2M in incremental expenditures
- Generate 2.48M leads to industry from all U.S. marketing activities

Targets for visits and spend are projected against media investment of \$4.8M media spend in Tier 1 and Tier 2 markets and past advertising campaign performance data. We are working to be more efficient in the market with comparable lead targets, but investing in reaching high-value travellers in more competitive markets.

Key Performance Indicators (where applicable):

- Increase in unaided destination awareness
- Increase in U.S. travel intention from target markets
- Lift in trip planning information seeking
- Web engagement score
- Social Content Advocacy and Audience Growth Rate
- Media Cost per lead
- Campaign performance measures (e.g., CTR, CPC)

Media and Public Relations / Broadcast Program – Ontario/Canada/U.S.

Destination Ontario will continue to support the Ontario, Canada and U.S. markets through its earned media program targeting broadcast media outlets (radio and television) as well as short- and long-lead print and digital publications. In 2023-24, Destination Ontario's media relations efforts will continue to be executed in close collaboration with industry partners, sector associations, and individual tourism operators. Activities will remain flexible and continue to highlight all areas of Ontario while aligning with DO's marketing campaign messaging and partner program.

Outputs

- Welcome media on press trips (FAM tours)
- Produce radio and television broadcasts promoting Ontario
- Showcase Ontario at media shows, marketplaces, and events
- Pitch tailored story ideas
- Respond to media inquiries, sharing content, images, and videos

Outcomes

Destination Ontario aims to generate \$30M Advertising Value Equivalency (AVE) in earned media across all of DO's priority markets, domestic and international. The number of regions covered, and partners promoted are also key outcomes.

International Markets

Most countries have eliminated travel restrictions and international visitation to Canada is forecasted to return to 2019 levels by 2026⁷. To capitalize on pent-up demand and capture Ontario's share of Canada's visitor potential, Destination Ontario will continue core business development, media and public relations, and consumer marketing tactics in existing priority markets while remaining open to new growth markets.

Budget allocation and market activity will continue to be determined based on opportunities for greatest return, and market readiness indicators such as consumer behaviour, interests, ability to travel and air access. Destination Ontario will remain flexible with the ability to refine tactics as market conditions and opportunities shift.

The latest international travel trends indicate a desire for safety, flexibility, nature, a slower pace, relaxation, luxury, and responsible travel; Canada, and specifically Ontario, is well-positioned to meet the demand for this type of travel. Destination Ontario will leverage these trends across tactics and lines of business.

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. A Team Ontario approach with all partners remains essential to recovery efforts.

⁷ Destination Canada, Tourism Outlook Spring 2022

Statistics Canada, tables 24-10-0050-01 Non-resident visitors entering Canada by country of residence 2019- July 2022

Outputs

- Build market strategies using research, data, and insights
- Build and strengthening industry, partner, and key account relationships
- Maximize Destination Canada partnerships to capitalize on 'Team Canada' global marketing budget, resources, research, and reach
- Provide industry leadership and support
- Collaborate with Destination Canada, RTOs, DMOs and industry to leverage partner-led efforts
- Leverage in-market expertise and support

Business Development

Destination Ontario actively promotes market-ready Ontario products and experiences to travel companies, directly and in partnership with Destination Canada, to build awareness and convert into bookings. Leveraging the powerful travel trade distribution network is a cornerstone of the strategy to increase visitation and expenditures.

Destination Ontario is returning to traditional tactics, such as marketplaces, sales missions, and familiarization tours, to connect with travel trade. Modified ways of conducting business, such as virtual training and hybrid events, provide additional ways to engage with travel companies to ensure that Ontario is top of mind and meeting pent-up demand.

Outputs:

- Deliver tour operator and travel agent training
- Showcase Ontario at events and marketplaces
- Conduct in-market sales programs and meetings
- Welcome trade through product (familiarization) tours
- Drive consumer sales through joint marketing agreements and promotions through trade channels
- Offer Ontario partners opportunities to access the trade.
- Train at least 2,500 travel agents on Ontario's travel products
- Develop 30 new product in tour operator offerings

Outcomes

- Generate \$10M in incremental expenditures as a result of travel trade bookings (includes the U.S.)

Media and Public Relations - International

Destination Ontario will continue to promote the province as a must-see travel destination through its media relations program. Working closely with journalists, editors and influencers, 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.

The agency's earned media program will continue to inspire travel from priority markets by proactively pitching media, nurturing relationships, participating in media relations

events, collaborating with partners, leveraging in-market expertise, and supporting industry stakeholders.

Outputs

- Welcome media on press trips (FAM tours)
- Showcase Ontario at media shows, marketplaces, and events
- Pitch tailored story ideas aligned with Destination Ontario's marketing campaigns, brand, and seasonal product spotlights
- Respond to media inquiries, sharing content, images, and videos

Outcomes

Destination Ontario aims to generate Advertising Value Equivalency (AVE) in earned media across all of DO's priority markets, domestic and international, as mentioned above.

Consumer Marketing

While international activities were scaled back through the pandemic, Destination Ontario continued to inspire future travel to the province through a variety of consumer marketing tactics, including launching a successful Visiting Friends and Relatives' campaign in the U.K. and Germany; developing curated market specific international landing pages on Destinationontario.com; and maintaining a localized social media presence in priority markets.

With the resumption of international travel, DO will continue to deliver compelling, quality content to international audiences across a variety of channels and tactics.

Pre-pandemic, Destination Ontario primarily leveraged Destination Canada's consumer marketing efforts to build awareness and consideration for Ontario as an international travel destination. Looking ahead and dependent on budget, DO will look to develop/lead more consumer marketing initiatives and continue supporting Destination Canada on smaller scale niche campaigns where suitable.

Outputs

- Launch Destination Ontario led consumer campaigns in select markets
- Invest in or amplify Destination Canada consumer campaigns across priority markets where suitable
- Develop market-specific content to distribute across digital channels and publish on dedicated landing pages on Destinationontario.com and through localized social media channels
- Run *AlwaysOn* paid search campaigns in markets with high search intent for travel to Canada, and Ontario's product offering
- Provide international travellers with content that specifically addresses their needs
- Increase traffic to trusted travel sources (Destination Ontario, Destination Canada, travel partners) and exposure for industry partners
- Grow Destination Ontario's social community and channel engagement

- Increase brand awareness, consideration, and travel intent
- Support Ontario partners in rebuilding for future

Outcomes

- Audience Growth
- Content Advocacy
- Web sessions/page views
- Web Engagement score (leads to partners and session duration)
- Pre-post campaign message lift (where applicable)

Northern Marketing and Partnerships

Destination Ontario will continue to support the northern tourism industry by working together with partners across Northern Ontario. Given the significant impact the U.S. border restrictions have had on Ontario's northern tourism industry, it will be vital to continue to collaborate on encouraging the return of American visitors and to continue to focus on a domestic traveller particularly as global inflation could impact travel intent. The agency will continue to invest in and support Ontario's avid tourism industries of angling and hunting, powersports and touring and outdoor adventure. Additionally, Destination Ontario will promote the region as a unique destination to experience leisure outdoors, arts, culture, and heritage. Avid programs to include:

Angling and Hunting

Ontario is the number one destination in Canada for angling and hunting with over 50% of the national yield spent in Ontario. 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 like television programming, digital advertising, and content, but also looking to engage avid consumers who are new to angling to effectively grow this consumer base including a fly fishing and leisure family target. Additionally, the agency will build on the successes of 2022-23, by further diversifying the deliverables with greater importance given to social channels and content development that included driving over 1 million leads to partners.

Powersports (Snowmobiling, ATV, Motorcycling, RV and Boating)

The powersports portfolio targets passionate travellers who own or rent motorized vehicles and encourages them to experience Ontario with a focus on the North. The powersports category requires travelers to stay in locations with quick access to gas, repairs and accommodations and adds direct and indirect tourism spending to communities. Snowmobiling continues to be a key winter economic driver for Northern Ontario with an influx of purchases during the pandemic looking for places to ride. In 2023-24, Destination Ontario will target new riders and build on the successes of previous campaigns to connect Ontario sledders with snowbelt destinations, loops, and trails. Motorcycling is also a key economic driver for Northern Ontario. With the U.S. borders now re-opened without restrictions, there is a strong opportunity to invite back

the American rider to Northern Ontario in 2023-24 summer and fall seasons. Destination Ontario will activate a content and digital campaign targeting high value riders in key Ontario, U.S., and Quebec markets in its 2023-24 marketing efforts.

Outdoor Adventure

The outdoor adventure program focuses on connecting adrenaline seekers and nature lovers with amazing outdoor experiences, especially paddling, and cycling across Ontario with a focus on the North. The outdoor program will build on successes of 2022-23 and continue to integrate with the Ontario Market Plan to profile avid outdoor experiences each season. In 2023-24, Destination Ontario will continue to engage U.S. paddlers and mountain bikers to visit Northern Ontario to experience premier paddling and biking experiences. This campaign is intended to drive positive destination awareness and encourage American paddlers and cyclists to book an outdoor adventure in Ontario through an outfitter. This campaign will build off the learnings of 2022-23 including driving over 300,000 leads to partners from planning content.

Arts, Culture, and Indigenous Experiences

Northern Ontario offers unique urban and rural cultural experiences ranging from galleries, music, Indigenous experiences, and food and drink. Looking to 2023-24, Destination Ontario will continue to build on engaging an art lover target with the distinct Group of Seven art experiences. The group is one of Canada's greatest art collectives and they came together in this province, and through their collaboration they changed the art world in Canada. Destination Ontario will continue to work with partners on content, asset acquisition and campaigns to help tell this Northern Ontario.

Outputs

- Target of 44 television shows produced, aired, viewership numbers
- Target of 133 stories written and posted on the Northern Portal (www.northernontario.travel)
- Target of 30 pieces of written content for destinationontario.com, traffic tracked
- Target of 16 videos developed, tracked views, clicks to partners
- Number of owned social posts, impressions, reach, leads, engagement
- Number of Media/Influencer Familiarization (Fam) Tours
- Number of consumer shows

Outcomes

- Reach 2019 pre-COVID overnight visitation from the drive markets
- Generate incremental visitation and incremental spend
- Generate 2.2M leads to industry

Key Performance Indicators (where applicable):

- Increase in travel intention to Northern Ontario
- Web engagement score
- Social Content Advocacy and Audience Growth Rate
- Lift in consumer awareness of Northern product
- Media cost per lead

- Campaign performance measures (e.g., CTR, CPC)

Content

Content is an essential piece of Destination Ontario's business marketing strategy. Content platforms, such as social media and websites, 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 content engagement, mentions, shares and referral traffic.

Destination Ontario has invested in a refreshed website and social media strategy. The goal is to deliver a highly discoverable and engaging experience that motivates potential travellers to action through a visitor-first content strategy.

The strategic priorities are:

- Accessibility – in both content and design
- Mobile first – a component-based design that put the mobile experience first
- Discoverability – content focused on search engine optimization
- Lead generation – ensuring partners and operators benefit from content interactions

Outputs

- Content calendar aligned with search interest, product availability and partner priorities
- Content partnership programs
- Creative and platform experiments that focus on increasing conversation rates
- Number of content pieces made available to consumer through digital and social media channels
- Evaluative user experience testing
- User interface enhancements
- Competitive website assessments
- Improve site hygiene
- Style guide
- Partner intake process

Outcomes

- Increase or maintain 2020 Engagement Rate = 1.5* (**2020-21 actuals*)
- Top-ranked user experience website out of the Provincial Marketing Organizations (PMO) for accessing travel information
- Increase in website and social media engagement
- Increase monthly number of unique visitors

Key Performance Indicators (where applicable):

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

- Website engagement score
- Website traffic
- Paid to non-paid ratio
- Social Content Advocacy and Audience Growth Rate
- System usability scale of 70% + (current score is 67)
- Site Health Score (Industry benchmark is 77)
- Referring Domains
- Returning Users
- Pages/Sessions
- Website Traffic Lead Rate
- Improved domain authority score – benchmark currently at 45
- Unique users

Industry Relations

Destination Ontario continues to lead industry stakeholders as the provincial marketing organization for Ontario. Destination Ontario offers 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 successful collaboration activities and enhance relationships to strengthen tourism 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.

The team will continue to share internal and external expertise and learning opportunities through “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. As an industry leader and trusted resource, Destination Ontario provides easily accessible, high-quality, and professional material; and lends expertise directly to partners by sharing insights, research, communications tools, and marketing support to help regenerate business and bolster economic activity. Destination Ontario will continue to support key partners by providing in-person and virtual attendance at conferences, meetings, and events. Staff from across the organization are readily available to share their expertise, best practices, and discuss Destination Ontario activities and programs. This provides an opportunity for industry stakeholders to learn and grow their own skills and programs within their organizations.

Partnerships

Through a partnership with Destination Toronto and Destination Canada, Destination Ontario successfully supported the launch of the MICHELIN Guide Toronto, the first destination guide for Canada. The agency will continue its involvement in this multi-year culinary initiative that will support one of the hardest hit sectors of the tourism industry – restaurants. Since its launch, the MICHELIN Guide has already raised the profile of Toronto, Ontario, and Canada as a world-renowned culinary destination. This initiative

is significant to the international markets, where travellers often seek destinations for their culinary and fine dining experiences. The MICHELIN Guide has brought significant local and world-wide attention and recognition and will continue to deliver benefits for years to come.

In 2022-23, Destination Ontario and Indigenous Tourism Ontario (ITO) signed a Memorandum of Understanding (MOU) that solidifies the collaborative relationship between the two organizations. While both organizations already have a strong working partnership, the MOU outlines specific areas for communication, marketing, and mentorship collaboration, with a goal to strengthen the Indigenous tourism industry across Ontario. Destination Ontario will support ITO with direct marketing investment in 2023-24, and further support Indigenous tourism businesses through Destination Ontario's internal marketing activities.

Destination Ontario will also support key sector associations with whom the agency has had long-standing partnerships - 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.

As other opportunities arise, Destination Ontario will remain open and flexible to partnership initiatives that will support the growth of visitation and spending for Ontario's tourism industry.

Partnered Marketing

Destination Ontario has 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

- Deliver programs to meet our collective business objectives and industry expectations with high confidence from partners while optimizing more predictable revenue streams
- Creating predictable investment to extend audience reach
- 2022 is a benchmark year as Destination Ontario updates the Partnerable programs;
 - Partner investment contribution totals
 - Number of contributing partners participating in programs
 - Industry partner net promoter score (recommend partnering with DO)

Key Performance Indicators (where applicable):

- Dollar value of partner investment
- Number of partners participating in programs
- Industry partner programs net promoter score

Ontario Travel Information Services (OTIS)

Destination Ontario's OTIS team offers trip planning and visitor information services through a range of service delivery channels to assist in moving potential and actual visitors to Ontario through the customer purchase cycle, from consideration and planning to booking and travelling in-market. The audiences for OTIS range from domestic Ontario and local residents to U.S. and international. Each audience has different needs when planning and travelling in Ontario and the OTIS team meets and exceeds those needs.

The team strives to deliver first-class visitor information and trip planning services across all OTIS front-line channels through a seamless, multi-footprint approach providing consumers the flexibility to interact with Destination Ontario using their preferred channels - when, where and how they want to help them discover the variety of travel experiences and products available in Ontario.

The OTIS team's travel information services have a direct impact on visitor travel activity, generating incremental visitation which boosts consumer spending and helps to contribute to Ontario's economy. OTIS will focus efforts on providing visitor information services at high profile festivals and events throughout the province and support tourism recovery pan provincially, especially in the Niagara region.

In 2023-2024, Destination Ontario will develop a strategy for modernizing the current operations of its 10 Ontario Travel Information Centres.

Ontario Travel Information Services include;

- In person at fixed centres:
 - at 10 Ontario Travel Information Centres located throughout the province
- In person through roaming mobile services at various locations:
 - at festivals and events and;
 - at major attractions and tourist hubs

- By phone: English/French
 - calling the 1-800-ONTARIO toll free tourism line
 - Open 7 days a week from 9 am to 5 pm
- By email:
 - contacting Destination Ontario at visitorcare@destinationontario.com on the Destination Ontario consumer website or our centres online listings
 - responded to daily from 9 am to 5 pm
- By Videoconference: English/French
 - booking a free 30-minute Zoom session through www.destinationontario.com website
 - available daily with some evenings and weekend appointments

Delivering Excellence in Visitor and Trip Planning Services

OTIS are focused on strengthening Destination Ontario's Visitor First approach through the implementation of its Visitor Care Strategy and tactical plan that is technology enabled through Destination Ontario's new customer care digital platform.

Proactive Trip Planning:

In the past, OTIS' most meaningful key performance indicator (KPI) was the number of parties counselled, defined as the total number of meaningful consumer interactions or engagements across all OTIS channels. Collaborating with the Data and Insights Team, OTIS will continue to modernize services and further develop its Visitor Care approach, by transitioning the KPI to "Trips Planned" (see definition under KPI section) ensuring the customer experience can become Destination Ontario's point of differentiation over other destinations.

Setting the OTIS Team up for Success:

To best support tourism recovery in Ontario, Destination Ontario will ensure all OTIS staff are trained, knowledgeable and up to date with Ontario's tourism products and experiences. This will involve in-person and virtual training from partners so that OTIS can best promote their products in all channels. Ongoing professional development will continue with the expansion of customer experience training and any channel specific training required resulting from the 2022-2023 OTIS audit.

Partnering for Success:

OTIS also consistently leverage industry partnerships to better promote Ontario's tourism products and services and support the industry in their COVID-19 recovery efforts. Staff work collaboratively with industry partners such as associations, RTOs, DMOs and business operators to offer roaming tourism services, promotion of products in centre, over the phone, by email and virtually and this results in opportunities for Destination Ontario staff training on new or updated tourism products and experiences.

Leading Visitor Information and Trip Planning in Ontario:

Destination Ontario will begin to play a more proactive leadership role in visitor information and customer experience functions with other local and regional Visitor Information Centres (VICs), RTOs, DMOs and community economic development

offices in the province by sharing best practices, leading training sessions, and encouraging the digitization of information.

Outputs:

- Pan provincial partner agreements with tourism organizations and businesses for:
 - roaming and mobile visitor information services program
 - sale of tourism products and services including merchandise, accommodation reservation etc.
 - partner activations in Travel Centres
 - roaming opportunities in other provinces and the U.S. Border States
- Provision of a high level of visitor care through further modernizing the delivery of services with a fully integrated omni channel experience by:
 - monitoring and evaluating previously integrated channels into the customer care digital platform tool for gaps in service and training and best practices:
 - 1-800-ONTARIO toll-free phone line
 - Social channels
 - Visitorcare@destinationontario.com email
 - Focusing resources on channels that are or have the most potential to influence trip planning behaviour to a greater extent
 - reviewing current state of workforce with a focus on broadening the scope of the Regional Program Coordinators and Team Leads
 - piloting a remote workforce to allow roaming in more locations across the province
 - transitioning one centre to seasonal operations as a pilot
- Expansion of DO's leadership role by:
 - Sharing additional digital training and online modules through webinars and workshops with VICs
 - Leading smaller and more regional on-site, in-person VIC training through Team Leads and Managers
 - Developing a virtual Ontario conference
 - Conducting a formal Visitor Information Services research scan to share with other VICs
- Address the results of the third-party formal OTIS (in-person, phone, email and Virtual) audit by identifying gaps in service and any channel specific knowledge training required
- Customer satisfaction surveys

Outcomes:

- Extend and influence travel purchasing decisions and increased perceived value of Ontario's products and services
- Repeat visitor engagement
- Increase staff knowledge of Ontario tourism products and experiences
- Lead best practices in visitor information and trip planning services across Ontario

Key Performance Indicators:

- Number of Trips Planned – the number of travel related consumer interactions across all OTIS channels that result in:
 - new activity/trip planned and/or itinerary developed (including single activity, day trip, overnight, etc.)
 - existing travel plan or itinerary is enhanced or increased (by extending length, adding experiences/products, etc.)
 - a booking made (attraction, event or experience, accommodations, or transportation) that results in incremental spend
- Visitor Health Score that includes:
 - Customer Satisfaction Score (CSAT)
 - Net Promoter Score (NPS)
 - Service Level (SL)
- Number of partners participating in:
 - Roaming programs
 - Attraction and tickets sales programs
 - Merchandise sales programs
- Industry satisfaction survey
 - Roaming program
- Number of consumer and visitor complaints across all channels

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 government 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

Key Performance Indicators (where applicable):

- Education Series Net promoter score
- Education Series Usefulness score

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 and growth. 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 a world-renowned brand, Destination Ontario was pleased to have the opportunity to partner with Destination Toronto and Destination Canada to bring the Michelin brand to Toronto and for the first time to Canada. It was an incredible event that showcased 17 Bib Gourmand restaurants and 13 Michelin Star restaurants, including a two-star restaurant. The journey is not over, as we will continue to work together to share why Toronto is recognized with this amazing culinary achievement.

COMMUNICATIONS PLAN

Destination Ontario is working to enhance its corporate communications activities. The objective is to strengthen Destination Ontario's engagement with tourism stakeholders through its corporate communications, ensuring that its corporate reputation as a leader of tourism marketing in Ontario is well received. The agency will also continue its 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/Corporate) and direct 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/Corporate).

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.

BASELINE MODEL PROJECTIONS

This is a baseline model projected incremental visitation and spend from U.S. and Ontario markets based on over ten years of historical data. Destination Ontario uses this baseline data as a starting point in projection models based on media investment. However, targets in the business plan uses this data as a starting point and then layers on media contextual data (awareness vs. prospecting media buying), market familiarity and campaign performance data.

Media Investment	Ontario Incremental Visitor Spend ⁴	Ontario Incremental Visits ⁴	U.S. Incremental Visitor Spend ⁴	U.S. Incremental Visits ⁴
\$1M	\$25.2M	177K	\$24.5M	63K
\$2M	\$30.1M	212K	\$107.5M	275K
\$2.5M	\$31.7M	223K	\$134.1M	343K
\$3M	\$33M	232K	\$156M	399K
\$4M	\$35M	247K	\$190.4M	487K
\$5M	\$36.6M	258K	\$217.1M	555K
\$5.5M	\$37.3M	263K	\$228.5M	585K
\$6M	\$37.9M	267K	\$239M	611K
\$7M	\$39M	275K	\$257.4M	658K
\$8M	\$40M	281K	\$273.4M	699K
\$9M	\$40.8M	287K	\$287.5M	735K
\$10M	\$41.5M	292K	\$300M	767K

	2021-22 Actual	2022-23 Goal*	2023-24 Goal ⁴	2024-25 Goal	2025-26 Goal
Incremental Visitor Spending					
Ontario	\$18.2M ¹	\$37M ²	\$33M	Goal dependent on approved media spend in table for Ontario. 2023-24 target based on current expected media investment of \$2.4M.	
U.S.	N/A ³	\$134.1M ²	\$204M	Goal dependent on approved media spend in table for U.S. 2023-24 target based on current expected media investment of \$4.8M.	

	2021-22 Actual	2022-23 Goal	2023-24 Goal	2024-25 Goal	2025-26 Goal
Media and Public Relations					
Earned Media (Advertising Value Equivalency or AVE)	\$5M ⁵	\$20M ⁷	\$30M ⁷	\$30M ⁷	\$35M ⁷
Business Development					
Incremental Visitor Spending, North America and International (via travel trade channel)	\$3M ⁵	\$5M ⁶	\$10M ⁷	\$15M ⁷	\$15M ⁷
Number of Travel Trade Trained	3,500 ⁵	2,500 ⁶	2,500 ⁸	2,500 ⁸	2,500 ⁸
Number of New Products Developed	20 ⁵	20 ⁶	30 ⁷	30 ⁸	30 ⁸
Industry Partnerships					
Total Leads to Industry Partners	3.7M ¹	9M	8.9M ⁹	8M ⁹	8M ⁹
Partners' Cash Contribution	\$260K	\$2.1M ⁹	\$2.1M ⁹	\$2M ⁹	\$2M ⁹

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

² Goal for Ontario and U.S. based on a media investment output of \$8M 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 and 2021-22.

⁴ Goals based on past Ontario and near U.S. ad tracking study incremental visit results and 2019 Statistic Canada's average spend per visit at pre-COVID-19 levels. Goals are based on historical data and can be adjusted based on media strategy and market familiarization

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

⁶ Target based on an assumption that the borders will remain open for 2023-24 onwards – 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 current business strategy and planned initiatives to maintain market share.

* Targets have been reinstated after modeling the current available data

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 and Public Relations

Earned Media (Advertising Value Equivalency or AVE) – The amount in Canadian dollars a similar size story/broadcast would cost if it appeared as paid advertising at a 1:1 equivalency ratio (outcome), determined by measuring size/length/reach 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. This includes:

- Supporting the Destination Ontario team with new realities due to COVID-19. For example, it will continue to provide guidance, direction, and policy to support as we transition to a hybrid work model.
- Continuing to support Destination Ontario program areas through organizational reviews and transformations as a result of agency mandate letters and DO strategic planning. This will be done with the support of the ministry's HR Strategic Business Unit and other human resources and labour relations partners, as required.
- Ensuring Ontario Public Service (OPS) policies, directives and programs on HR matters continue to be followed in a consistent and responsible manner. This includes matters around recruitment and fair hiring practices, FTE management, talent/performance management, labour relations, and employee engagement. DO will also continue supporting any HR initiatives that are OPS driven, such as large-scale job description reviews.
- Contributing to a more diverse and equitable OPS as part of the ongoing OPS commitment to anti-racism and equity, 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 Advisory 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 for the 2023-24 performance year 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, inspiring travellers through their passions, interests, and needs. Destination Ontario will start with an empathetic understanding of the traveller's needs, interests, planning and purchase behaviour. The agency will inspire travel to and around Ontario and focus investment on highest return markets, integrate market activity and remain flexible to opportunities.

Destination Ontario will have modern marketing campaigns informed by data and consumer insights. Emerging technology and marketing trends will inform the mediums that Destination Ontario markets in and activities the agency undertakes.

- Continue to lead and collaborate with industry partners toward mutual success, strong return on investment and provide value to industry stakeholders. Build alignment and collaborate across the Ministry portfolio including other provincial agencies.
- 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 organization. Destination Ontario will strengthen advertising impact tracking and investigate and adopt new, innovative measurement tools.
- 'Connect, Lead and Inspire' a collaborative approach within the organization and across the industry. The agency will be nimble, adopt a culture of ongoing program evaluation and regularly evaluate program performance.

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.

In 2022-23, DO received capital funding from the Ministry of \$325,000 to re clad the roofs of the Hawkesbury, Pigeon River, Sault Ste. Marie, and Barrie travel information centres to address the issues of peeling paint by providing a long-term roofing solution. The Niagara Falls travel information centre also received a \$25,000 grant to upgrade its security system.

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 deliver programs to meet our collective business objectives and industry expectations and help Ontario's tourism industry. Destination Ontario will remain flexible and may make in-year adjustments to address changes affecting travel, shifting target markets, if needed, and meeting the needs of the tourism industry.

FINANCIAL BUDGET AND STAFFING

Financial Budget

DESTINATION ONTARIO

2023-24 THREE YEAR PROPOSED BUDGET

(\$ 000's)

PROGRAM	PRIOR YEAR BUDGET 2022-23	PROJECTED ACTUALS 2022-23	CURRENT BUDGET 2023-24	PROPOSED BUDGET 2024-25	PROPOSED BUDGET 2025-26
Revenue:					
Province of Ontario Grant	33,087	33,398	33,087	33,087	33,087
Advertising Sales	500	2,276	2,000	2,000	2,000
Travel Information Centres - Sales and rentals	400	350	350	350	350
Trade Promotions	100	-	-	-	-
Interest Income	25	60	25	25	25
Amortization of Deferred Contribution	26	58	26	11	1
	34,138	36,142	35,488	35,473	35,463
Expenses:					
Advertising and Marketing	17,008	24,352 ¹	19,360 ¹	18,402 ¹	18,538 ¹
Salaries and Benefits	9,595	9,595	9,900	10,098	10,300
Travel Information Services	2,819	2,769	2,750	2,805	2,861
Technology Operations	1,300	1,088	617	1,000	1,000
Marketing Intelligence & Business Strategy	1,200	624	900	900	900
Partnerships	1,000	989	989	989	989
Amortization of Capital Assets	1,015	709	584	436	519
Facilities	768	788	850 ³	850 ³	450
Supplies & Equipment	360	360	366	371	377
Board and Committee Expenses	35	16	20	20	20
Audit	27	27	27	27	27
	35,127	41,317	36,363	35,898	35,981
Net Revenue	(989)	(5,175) ²	(875)	(425)	(518)
Carryover Funds	-	4,524 ²	-	-	-
Addback Non-Cash Items:					
Amortization of Deferred Contribution	(26)	(58)	(26)	(11)	(1)
Amortization of Capital Assets	1,015	709	584	436	519
Surplus (Deficit)	-	-	(317)	-	-
Projected FTE Count	84.03	88.03 ⁴	88.03 ⁴	84.03	84.03

¹ 1) Ontario; 2) U.S. short-haul/rubber tire [California, 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; 12) Australia as planned currently, but subject to change.

² The deficiency of revenue in 2022-23 was offset by surplus funds from deferred and/or cancelled marketing activities in late 2021-22.

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

⁴ Received approval for 4 temporary FTEs from the MTCS Deputy Minister FTE Pool on a 2-year term effective April 1, 2022 to March 31, 2024.

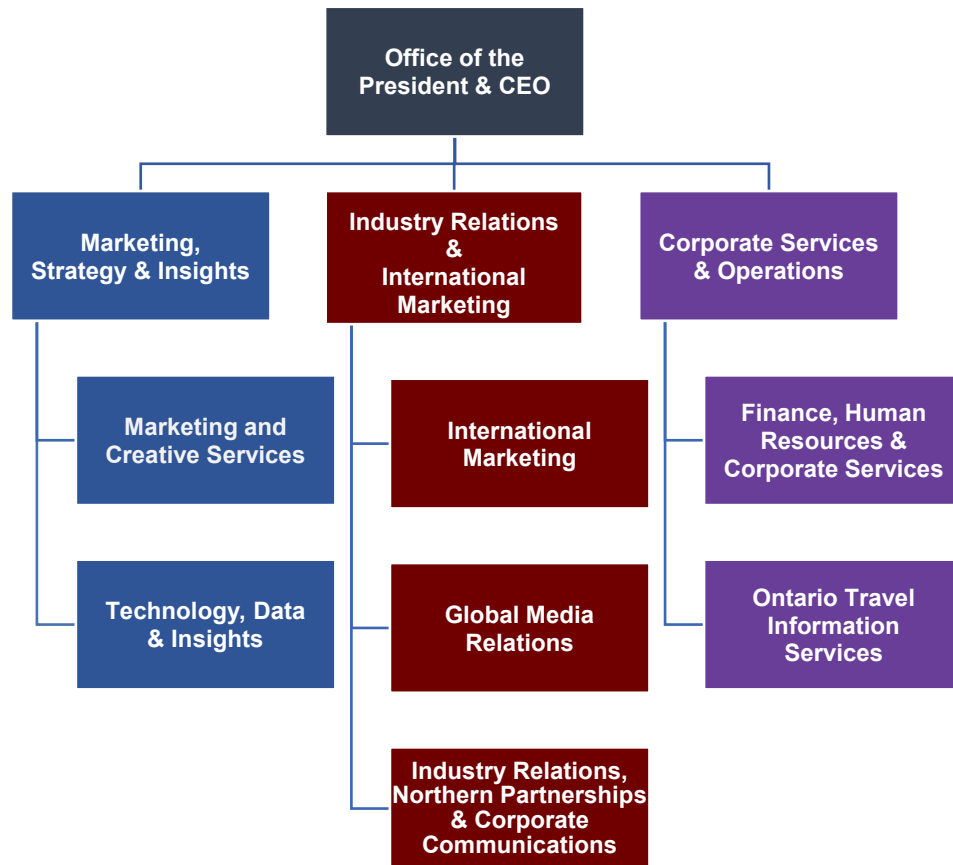
Staffing

Destination Ontario is comprised of 88 Full-Time Equivalents (FTEs) composed of Association of Management, Administrative and Professional Crown Employees of Ontario (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

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 of Ontario communities.

As per the 2023-24 mandate letter from the Honourable Neil Lumsden, Minister of Tourism, Culture and Sport, Destination Ontario will continue to align its goals, objectives, and strategic direction with government priorities and direction; and act in the best interests of the people of Ontario and ensure value for money to taxpayers.

Destination Ontario will:

Take a leadership role in collaborating with tourism stakeholders, including with RTOs, DMOs, sector associations, Destination Canada, and other agencies of the Ministry to deliver a collective brand message showcasing the province to Ontarians, Canadians, and the world.

Deliver increased visitation and job creation and ultimately drive economic growth for tourism's hard-hit sector to return to and exceed pre-pandemic level through data-informed marketing strategies to attract visitors to Ontario.

Enhance data collection, performance measurement and reporting.

Support the government's priorities related to growing tourism in the Niagara Region and showcase Ontario's many festivals and events as well as the agencies and attractions.

Develop a strategy for modernizing travel information centres and other online platforms and make recommendations to the Ministry.

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 Inclusion; 6) Data Collection; 7) Digital Delivery and Customer Service .

Destination Ontario as an agent of the Crown will continue to adhere to the guidance outlined in the Minister – Chair Memorandum of Understanding (MOU), as well as the Agencies and Appointments Directive.

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, inflation and economic downturn), 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 to address current conditions. Depending on the issue/event, there would still be an impact to results due to change (e.g., reduction of investment, market reach) to or even pause of destination marketing.
Align with the government's provincial reopening framework and public health guidelines to appropriately determine timing and reach of marketing efforts	Coming out of the global COVID-19 pandemic Destination Ontario is dependent upon broader government direction on timing for tourism and travel related marketing activities and will need to align to current health and safety guidelines. Tourism marketing efforts will continue to be guided by public health direction and both traveler's behaviour data, and market research about tourism and acceptance to inbound travelers to their communities.	Delivery / Operational - Environmental	Destination Ontario will ensure marketing collateral educates travellers on safety guidelines while travelling. Marketing focus aligns with government guidelines of travel. i.e., encouraging localized travel, regional travel, national or international travel.	Possibly - 3	High - 4	Medium - High	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. 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 cancelation 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.

Ensure the safety of electronic data for all Destination Ontario's corporate staff and external website users	Modern business is conducted largely using web-based tools. Web based tools are subject to phishing, hacking and other cyber-attacks that expose Destination Ontario to external security/privacy breach.	Delivery / Operational - Technology	<p>All data is encrypted, 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.</p> <p>Staff are reminded of cyber risk associated with communication tools and web behaviour. Staff have tools available to draw attention to suspicious email activity through easy one-click reporting to central I&IT.</p> <p>All endpoints are accessed through HTTPS.</p>	Possibly - 3	Moderate - 3	Medium	<p>Any new technology developed is reviewed by Provincial Government Privacy Impact Specialists; and revisions are made based on their recommendation.</p> <p>Applications are designed and deployed within tier architecture for a logical separation of web and app/data components for better security control.</p>
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Ensure the continuity of Destination Ontario's operations when access to physical office(s) are restricted	Provincial lockdowns (partial or full) as experienced during the COVID-19 pandemic will put a strain on access to technology (e.g., internet, social media) and there is a potential for negatively impacting operations.	Delivery / Operational - Technology	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.	Unlikely - 2	High - 4	Medium	<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>
Deliver Destination Ontario programs on time and on budget and regularly communicate with partners and stakeholder to avoid surprises	Delays in programming approvals, may result in a negative impact on stakeholder relations.	Delivery / Operational - Timeline	<p>All projects have developed critical paths that partners are consulted as appropriate. 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>	Possibly - 3	Moderate - 3	Medium	<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>

Measure and monitor Key Performance Indicators (KPIs) that are specific, measurable, achievable, realistic, and timely to inform and improve program delivery and results	<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>	Delivery / Operational - Information	<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>	Possibly – 3	Moderate – 3	Medium	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.
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<p>Deliver impactful marketing that maximizes performance results</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>Status quo annual allocations result in decreased marketing investment in real terms over time which jeopardizes ability to maintain strong performance results for corporate Key Performance Indicators (KPI's).</p>	<p>Delivery / Operational</p> <ul style="list-style-type: none"> - Environment 	<p>Destination Ontario works with its Agency of Record for marketing and creative services to develop research insights informed impactful marketing campaigns. Destination Ontario has secured a Agency of Record for two years with option to extend for two additional terms of up to one year each for a total of four years to an expiry date of July 26, 2024</p> <p>Destination Ontario works with its Agency of Record 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>Destination Ontario works with Advertising and Communications Services Procurement Branch (ACSPB) that is responsible for managing the Advertising and Marketing Communications Services Vendor of Record procurement to proactively request timely Treasury Board of Cabinet approval to procure these services per the agency's current Delegation of Financial Management Authority.</p>
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Deliver effective marketing activities while complying with OPS I&IT standards	Inability to function effectively due to strict OPS I&IT standards created for protecting government and personal information.	Delivery / Operational - Technology	Destination Ontario seeks supplementary I&IT approval and exemption where appropriate for access to OPS restricted applications to proceed with and optimize required marketing business activities.	Possibly - 3	Minor - 2	Low	Where barriers are identified, Destination Ontario works with Ministry and broader OPS colleagues to enhance permissions for digital marketing and data collection.
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 has secured 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 where the vendor has declined to remove the clause.
Evolve and modernize Destination Ontario marketing activities to utilize the most up to date technological advances	Reluctance or delayed acceptance 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.

Attract and retain best-qualified staff to effectively deliver Destination Ontario's mandate	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.	Delivery / Operational - Human Resources	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.	Possibly - 3	Moderate - 3	Medium	<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>
Maximize value for money and return on investment of marketing activities within allocated budget	Agency's marketing investment for domestic and international markets out matched by competing jurisdictions with large marketing budgets.	Financial - Forecast	Destination Ontario management works with a media planning and buying service to balance audience reach with scale of media buy budget. Performance targets are based on available budget.	Likely - 4	High - 4	Medium - High	<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>
Strategically balance types of media buys to maximize highest return on investment	Higher media buying and production costs in traditional, yet effective, media channels such as TV.	Financial - Market	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.	Likely - 4	Moderate - 3	Medium - High	Destination Ontario strategically targets markets of highest return, allowing for a focused approach.

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	Regional representation on the Board of Directors.	Public Perception / Stakeholder - Reputation	Destination Ontario has regular communication with Ministry appointments staff on the desire to ensure balanced regional (and particularly northern Ontario) representation on its board.	Possibly - 3	Moderate- 3	Medium	Collaborative approach: DO management and staff regularly interact with Ministry appointments staff to communicate desire to have balanced regional representation on its Board.
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.

Understand public attitudes and behaviours in Canada and other countries to inform strategic and tactical planning	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.	Public Perception / Stakeholder - Performance	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.	Likely - 4	Moderate - 3	Medium - High	Destination Ontario has program flexibility to shift strategy and adjust marketing tactics to address environmental conditions.
Ensure Ontario brand "Ontario Yours to Discover" is appropriately promoted by DMOs	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.	Public Perception / Stakeholder - Reputation	Destination Ontario assists and advises tourism stakeholders on how to minimize risk when buying programmatic ads.	Possibly - 3	Moderate - 3	Medium	Destination Ontario works with the Ministry Communications team when potential public issues are identified to proactively address potential issues.
Provide timely reporting to the Ministry	Failure to meet deadlines and requirements could contravene regulations and directives.	Governance / Accountability - Controllership / Compliance	Collaborative approach with the Ministry and tourism industry on COVID-19 response.	Unlikely - 2	High - 4	Medium	Destination Ontario works with the Ministry to meet timelines and reporting criteria.

Comply with OPS policies and directives	Non-compliance with established policies and directives may result in issues for: financial accounting, employee relations, accountability requirements, and reflect negatively on the organization.	Governance / Accountability - Controllershship / Compliance	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.	Unlikely - 2	Moderate - 3	Low	<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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Address and implement recommendations from external reviews	Negative attention from stakeholders due to failure to address the recommendations of external reviews (public servant expense claim audits, mandate reviews).	Governance / Accountability - Controllership / Compliance	<p>The Public Appointments Secretariate requires Board appointees to undertake Board Appointee training on governance and accountability.</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>	Unlikely - 2	Moderate - 3	Low	<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>
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Secure funding for capital needs at Destination Ontario offices while maximizing marketing budget	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.	Delivery / Operational - Infrastructure	<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>	Likely - 4	Moderate - 3	Medium - High	<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>
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