

DESTINATION ONTARIO

An Agency of the Government of Ontario

BUSINESS PLAN

2020-2021

DESTINATION ONTARIO BUSINESS PLAN 2020-2021

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EXECUTIVE SUMMARY

Destination Ontario's Business Plan 2020-21 reflects strategic activities and programs to support the significant impact that the COVID-19 pandemic has had on the tourism industry. All recovery efforts will continue to deliver on Destination Ontario's mandate to drive tourism visitation and increase economic impact for the tourism industry in Ontario. Destination Ontario's Business Plan is flexible, and adjustments will be made as needed should future impacts to travel occur. Activities undertaken will always be focused on supporting the tourism industry.

As an agency of the Ministry of Heritage, Sport, Tourism and Culture Industries (the Ministry), the organization will support the Ministry's double bottom-line to showcase Ontario's cultural fabric and maximize economic impact of the industry sectors.

Destination Ontario will deliver marketing activities that reflect the integrated impact of heritage, sport, tourism and culture in the province, and will work with industry partners to achieve the necessary collaboration and coordination for a domestic travel year.

The organization will deliver visitor-first marketing to inspire tourists about Ontario and encourage travel within Ontario, focusing on increasing economic impact where losses have been felt during the pandemic.

MANDATE

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

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

The following principles support the mandate:

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

Vision

To position Ontario as a preferred global destination.

Mission

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

ENVIRONMENTAL SCAN

The COVID-19 pandemic has had a massive impact on Ontario, Canada and the world. It was almost impossible to imagine how this pandemic would unfold with closures, restrictions and health indicators. The Ontario government's *Framework to Re-Open Our Province* outlines a phased approach to re-start the economy.

The following points highlight the current environment.

Tourism Forecasted Outcomes

- In June 2020, Destination Canada revised its visitor forecast demands as a result of international border closures and the evolving pandemic situation across the globe. Forecasts estimate¹:
 - 43% to 61% drop in Canadian revenue generated from tourism receipts.
 - Expectation of recovery to 2019 levels by 2023/2024.
- As of July 19, 2020, Destination Canada has forecasted Ontario's lost tourism revenue from international markets will be down by 80% compared to 2019².

Perceived Economic Impact³

According to an Ipsos study from July 2020, Canadians are concerned for their financial future and travel is a luxury that many may not take or reduce spending on for this year.

- 92% of Canadians foresee an impact on the financial markets and global economy.
- 32% of Canadians think their job or business is threatened by COVID-19.

Canadian Travel Outlook³

According to an Ipsos Canadian study from July 2020, Canadians are cautiously traveling due to the uncertainty around consistent safety protocols and ability to enforce physical distancing.

- 75% of Canadians agree that they will not feel safe until a vaccine is developed.
- 78% of Canadians are not comfortable taking a vacation this year, regardless of when the pandemic ends.
- 25% of Canadians consider travelling within their province as risky.
- Net intent to travel to other provinces remains negative and in line with data seen over the past two months, especially with Ontario and Quebec being the most impacted (currently the provinces worst-hit by the pandemic).
- 37% of Ontarians are likely to avoid travel even within their own province.

Ontario Travel Outlook⁴

According to an Ipsos Ontario study from June 2020, Ontarians readiness to re-engage with travel depends on their values, beliefs, situation and view about COVID-19

¹ Destination Canada Visitor Demand Forecast July 2020 Report, Data up to June 21, 2020.

² Destination Canada COVID-19 Impact and Recovery Report: International Summary, Updated: July 21, 2020.

³ Ipsos Coronavirus – Canada Tracking #20 Report July 23, 2020: an online poll between July 17 – 20, 2020.

⁴ Ipsos Limited Partnership, Ontario Consumer Behaviour Study, June 2020.

regardless of their age or gender. To convince Ontarians to reengage with regular activities will require visual modelling of right behaviour and a positive but cautious tone.

- 20% of Ontarians are “Ready to go” – unlikely impacted financially or know someone infected by COVID-19; therefore, comfortable to immediately resume regular activities and do not need further convincing.
- 19% of Ontarians are “Nearly Ready” - unlikely impacted financially or know someone infected by COVID-19 and feel the worst is behind us; therefore, somewhat comfortable to immediately resume regular activities.
- 23% of Ontarians are “Want to, but can’t” – more than 50% impacted financially and highest proportion of personally or knowing someone that has been infected specifically front-line workers; therefore, not comfortable participating in activities.
- 18% of Ontarians are “Content” – unlikely impacted financially or know someone infected by COVID-19 and feel they can wait it out; therefore, not ready to participate in activities.
- 20% of Ontarians are “Afraid” – most likely impacted financially or know someone infected by COVID-19 and not likely not have ability to resume normal activities.

Ontario Resident Sentiment⁵:

According to Destination Canada’s resident sentiment survey from July 2020, majority of Ontarians are not particularly welcoming to visitors from outside their community.

- Ontario is the least welcoming of visitors from other communities near them and from other parts of Ontario compared to other provinces.
- 40% of Ontarians would welcome visitors from other parts of Ontario.
- 32% of Ontarians would welcome visitors from other parts of Canada.
- 6% of Ontarians would welcome visitors from the United States (U.S.) to their community.
- 8% of Ontarians would welcome visitors from other countries.

⁵ Destination Canada Resident Sentiment Survey Report, July 28, 2020.

STRATEGIC DIRECTIONS

Destination Ontario's three-year *Strategic Playbook*, approved by the organization's Board of Directors (the Board), supports Destination Ontario's work as the lead provincial tourism marketing organization for Ontario. The *Strategic Playbook* outlines key objectives and strategic priorities to grow the tourism industry and support marketing and partnership efforts that will have positive economic growth and job creation for Ontario.

Objectives

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

Strategic Priorities

1) Visitor First Marketing

Destination Ontario will start with an empathetic understanding of the traveller's needs, interests, planning and purchase behaviour. The agency will focus marketing campaigns on inspiring consumers through their passions and interests. Destination Ontario will map out and establish the best possible position in the visitor path to purchase and focus efforts there. The agency will inspire travel to and around Ontario and focus investment on highest return markets, integrate market activity and remain flexible to opportunities. 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.

2) Re-defining Partnerships

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

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

3) Strong Research, Strong Outcomes

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

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

4) Dynamic Organization

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

OVERVIEW OF CURRENT PROGRAMS AND ACTIVITIES

The Business Plan for 2020-21 is focused on strategic activities and programs to help Ontario's tourism industry through the challenging times related to COVID-19. The tourism industry has been significantly affected, one of the first industries to be hit and likely one of the last to recover. Destination Ontario's budget will remain flexible during this fiscal year, recognizing that in-year adjustments may need to be made in order to address changes affecting travel and to meet the needs of the tourism industry.

As an agency of the government, Destination Ontario will work closely with the Ministry to leverage synergies and collaborate amongst the Ministry's sectors to assist stakeholders to recover and rebuild. Wherever possible, Destination Ontario will ensure that its work complements the Ministry's priorities and double bottom-line to showcase Ontario's cultural fabric and maximize economic impact for the industry.

As the lead provincial tourism marketing organization, Destination Ontario will work in partnership with tourism stakeholders to re-ignite tourism marketing across Ontario. While tourism will begin at the local and province-wide level, Destination Ontario will also build strategic plans to showcase Ontario as a renowned travel destination to the U.S. and international visitors when the time is right. The intent of driving economic impact and achieving direct results for the tourism industry across the province will continue to remain a top priority.

Corporate Governance

As an agency of the government of Ontario, Destination Ontario is governed by a Board of Directors comprised of business leaders and based on recommendations from the Minister of Heritage, Sport, Tourism and Culture Industries. Board members are public appointments by the Lieutenant Governor in Council. This year, Destination Ontario has a number of new members appointed to the Board. Staff will work closely with the new members to ensure they have onboarding materials necessary to serve in their position, as well as briefing materials that will 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. Through the challenging times of the COVID-19 pandemic, the President's Office will work closely with the Ministry to collaborate on government communications, industry support and recovery planning.

Corporate Services

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

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

Marketing

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

Destination Ontario's marketing efforts are supported by guidance and collaboration with tourism partners across Ontario, including Regional Tourism Organizations (RTOs), Destination Marketing Organizations (DMOs), sector associations, other provincial agencies and individual tourism operators.

This year, marketing efforts will be significantly impacted by COVID-19. While the pandemic continues, there will be serious impacts to consumer mindset, travel behaviour and tourism spending. Destination Ontario will follow the lead of government health authorities and will only market when travel is deemed safe. Destination Ontario will primarily focus on hyper-local and pan-Ontario activities for this fiscal year. Further marketing plans targeting Canada, key U.S. markets and international markets will be planned for 2021-22 and beyond, providing health indicators remain positive and travel restrictions ease.

As part of the content strategy, Destination Ontario will deliver 'AlwaysON' content campaigns that connect travellers with dynamic travel ideas through social channels such as Facebook, Twitter, Instagram, written content, short and long-form video, as well as WeChat and Weibo for China. Content will be balanced between virtual experiences, safe, local travel ideas (e.g., cycling, hiking) and inspirational content for future travel. 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.

The multilingual consumer website (ontariotravel.net) promotes travel products, experiences and travel packages, while also directly connecting consumers to industry partners to book their travel. There are ten country websites as part of the consumer system. Content on the consumer website will be written and refreshed through a COVID-19 lens and updated with links to pertinent health information from the Ontario government.

The corporate website (destinationontario.com) provides the tourism industry with marketing tools, as well as information on Destination Ontario's plans, strategies, programs and partnership opportunities. There is also an array of inspiring Ontario images through an online image database (imageontario.com), for partners and media to access for promotional purposes. The corporate website will provide information that may be relevant to stakeholders to assist during the COVID-19 pandemic (e.g., consumer sentiment research).

Northern Marketing

Destination Ontario has a specific focus on increasing visitation to Northern Ontario. Destination Ontario works with Northern tourism partners to market the North's unique experiences and natural landscapes. While the North as a destination is promoted and integrated across all the organization'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.

Marketing Northern Ontario regions and experiences relies heavily on the U.S. traveller. However, with travel restrictions in place, Destination Ontario will adjust and shift the Northern marketing focus to both an avid and leisure Ontario and Canadian traveler, and when the time is right, also target the U.S. traveler for future travel. Collaboration with Northern partners will be critical to leverage marketing plans to target new potential consumers.

International Marketing

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

In the context of COVID-19, attracting the international traveller and selling a trip to Ontario is likely to be more challenging than previous years, as there will be a smaller portion of the population willing to travel long-haul and global competition will be fierce. Joint marketing with key travel trade partners will be key to international recovery efforts. This year, promotional activity through tradeshow, and marketplaces will not take place face-to-face, however, where it makes sense, Destination Ontario will

participate virtually. Business-to-business activity in key markets will continue through virtual connectivity and through Destination Ontario's in-market representatives, using their stewardship and on-the-ground expertise, to ensure travel trade relationships remain strong and Ontario is kept top-of-mind when international travel resumes. Destination Ontario will take the lead of Destination Canada to resume consumer campaigns when it is appropriate to do so.

Marketing Intelligence and Business Strategy

Destination Ontario conducts tourism research and data analysis that provides market intelligence and consumer behaviour insights to enable Destination Ontario and 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 sentiment research, data and insights will be especially important this year as Destination Ontario plans for recovery efforts and a return to travel.

Earned Media Relations and Broadcast Program

To generate media coverage of Ontario as a must-see destination, Destination Ontario works with members of the travel media in key markets, including journalists, influencers and broadcast media partners. Ontario is highlighted through regular features and broadcast programs, customized media tours, media marketplaces and events, developing positive coverage with media outlets to generate interest that will deliver travel results. As travel resumes, Destination Ontario will work to generate media coverage that is appropriate and informative for a new travel reality while focusing on travelling safe.

Partnerships

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

The organization will continue to partner with RTOs, DMOs, sector associations and Destination Canada 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 and support RTOs, DMOs and sector associations through this challenging time in capacities where they may no longer be able to. Destination Ontario will also collaborate to support partner efforts that drive direct results to tourism businesses.

Destination Ontario will lend its expertise directly to partners by sharing insights with tourism stakeholders at virtual events, through collaborative meetings and communications tools. The sharing of information and insights will help provide the industry with the tools they need to regenerate business and bolster economic activity.

Ontario Travel Information Centres

Ontario Travel Information Centres (OTICs) provide a welcome to visitors. Operated by experienced travel counsellors, Destination Ontario's OTICs offer visitors valuable and on-the-spot information on travel ideas in Ontario. OTIC staff will provide travel information using safety precautions to ensure the well-being of staff and visitors.

IMPLEMENTATION PLAN

First Quarter Activities

The impact of COVID-19 on the travel and tourism industry has been significant. When the virus began to quickly spread, countries around the world, including Canada, implemented the closure of borders to non-essential travel and recommended stay at home measures for its citizens.

Given that Destination Ontario's core mandate is to market Ontario as a tourism destination, it was determined that all marketing should be paused during the time of restrictions on travel. This included, all marketing campaigns currently or planned to be in-market, media relations and broadcast program activities, social channels and attendance at travel shows internationally and domestically. OTICs also temporarily paused operations. As advised by the Ontario Public Service, all Destination Ontario staff were instructed to work from home.

Destination Ontario slowly began to restart some activities to provide support to tourism businesses during a time when travel was deemed non-essential. Social channels were reignited to provide inspirational content that demonstrated both the beauty of Ontario but also the good of Ontarians who were providing support to fellow citizens (i.e., #OntarioSpirit).

Destination Ontario executed the delivery and maintenance of a new virtual hub, Ontario.Live (www.ontario.live), designed to promote and support businesses in the tourism, sport, and creative sectors. Ontario.Live included virtual content with creative ways to showcase and enjoy Ontario talent and experiences without leaving your home. Destination Ontario collaborated with Ontario Creates on some aspects of Ontario.Live including the integration of the MusicTogether.ca platform and Ontario film and television content. Ontario.Live also provided a platform for Ontario businesses to sell a variety of products including culinary, wine and craft beer. Results to date include: 430 businesses featured, more than 77,000 web visits, and more than 5,000 leads to business.

Through a partnership between Destination Ontario and Destination Canada, a \$13 million Domestic Recovery Marketing Support Program was developed to bolster local tourism. Destination Ontario recognizes that support for communities and tourism businesses across the province is urgently needed and that tourism will re-start at the community level across Ontario.

Destination Ontario is taking the unique opportunity to leverage federal dollars from Destination Canada and deliver a program that directly supports Ontario communities and businesses to deliver locally-led/locally-focused marketing campaigns encouraging Ontarians to discover their own back yard, and broader, when the time is right. The program will reinvigorate tourism economies and deliver a much-needed boost to local businesses.

The Domestic Recovery Marketing Support Program is a by-invitation program. Recipients include DMOs, RTOs, and sector associations – these organizations will aim their efforts at restarting tourism at the community level; helping Destination Ontario deliver on its recovery marketing strategy; and building marketing content for alignment with Destination Canada’s future national and international campaign efforts.

To understand the consumer mindset and to inform marketing recovery strategies, Destination Ontario has access to various economic and public attitude and behavior research studies. The core of the information is from economic models and consumer sentiment research studies that are structured to better understand when and where to re-engage visitors to think about travelling and with what messaging. Key findings from the research were distributed to stakeholders and provided on Destination Ontario’s corporate website.

Throughout the first quarter of the fiscal year, Destination Ontario focused on the development of strategic plans to support the industry during the immediate, recovery and rebuild stages. Marketing plans were developed for all markets: Ontario, Canada, U.S. and international. OTICs also developed a plan for a staged approach to re-opening travel centres safely. Other areas of the organization worked closely with stakeholders across Ontario to help support their efforts and provided support to the Ministry and the Minister’s Advisory Councils.

Activities for Remainder of Fiscal Year

As the lead provincial tourism marketing organization, Destination Ontario will continue focus on the agency’s legislated mandate to promote Ontario as a travel destination with the goal of increasing visitation and expenditures. As travel resumes and consumers feel comfortable travelling safely, it will be more important than ever to provide travellers with content, ideas, and access to travel information.

Plans will be adjusted as needed to meet any continued impacts related to COVID-19, such as a second wave and/or if health authorities deem travel as a non-essential activity that is not encouraged.

Marketing

Destination Ontario has developed a phased Roadmap to Recovery strategic plan to help support the tourism industry during and post the COVID-19 pandemic. This global pandemic has had a devastating impact on tourism and Destination Ontario can play a critical role in supporting the industry by inviting travellers back to experience the beautiful province of Ontario.

Destination Ontario's Roadmap to Recovery will be implemented in lockstep with the Government of Ontario's *Framework for Reopening our Province* and be guided by the Ministry and the work of the government's Ontario Jobs and Recovery Committee.

Market plans will be guided by the best possible market intelligence available to make timely and responsible decisions while remaining flexible and ready to shift as necessary.

A phased marketing strategy will work to increase consumer confidence, support the industry and influence consideration of Ontario as a preferred destination starting with a hyperlocal focus and building towards welcoming back international high-yield travellers.

Destination Ontario will develop its marketing activities based on strong strategies, effective media planning and inspirational creative ideas to generate incremental visitation and incremental expenditure. Destination Ontario will support the industry by driving leads through impactful partnership campaigns.

Ontario Market

Destination Ontario will begin marketing with an initial domestic campaign encouraging safe and local travel. Through the leveraged funds of the Destination Canada / Destination Ontario Domestic Recovery Marketing Support Program, Destination Ontario will deliver a provincial marketing campaign. 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 specific passions, key avids, families, as well as accessible, Indigenous, Francophone, Lesbian, Gay, Bisexual, Transgender, Queer+ (LGBTQ+), and multicultural audiences.

The marketing objectives will be to:

1. Communicate to Ontarians what safe travel is from the operator, community and traveller's perspective;
2. Encourage Ontarians to travel safely and locally within Ontario and rediscover their communities in a flexible way, while rebuilding consumer confidence in tourism; and
3. Support local communities and tourism operators when travel is appropriate and health protocols are in place.

The Ontario marketing campaign will evolve as more businesses, experiences and products become available over late summer, fall and winter. The campaign will shift from a local message (as restrictions ease) to expanded travel messages as more cross-provincial travel is permissible. The media strategy will remain flexible to accommodate the needs of industry.

If applicable, the strategy will start in the summer with initial recovery messaging, hyper-local travel/experiences and promotion of day trips. It will evolve in the fall to include expanded experiences, regional travel and overnight stays. In the winter, further

expanded experiences, cross provincial travel and multi-night travel will be promoted. All timeframes will always include a safe travel message.

Outputs

The campaign will use various mediums to communicate the message and all mediums will be integrated within one system to ensure consistency and breadth of promotion. Destination Ontario's marketing activities will also include the province's strengths of inclusiveness and diversity, while also showcasing its beautiful landscapes and scenery. Strategic themes will drive content connected to specific passions, key avids, families, as well as accessible, Indigenous, Francophone, LGBTQ+, and multicultural audiences.

Destination Ontario may utilize the following activities for the campaign:

- Radio – campaign messaging broadcast on 298 radio stations and 21 languages.
- Digital video – video clips inspiring Ontario residents to travel safely within Ontario reaching an estimated 10 million Ontarians.
- Partner Content – dedicated media dollars promoting unique partner stories collected from RTOs, DMOs and sector associations.
- Earned Media – featured coverage for TV, radio and print told through major media partners.
- Ontario.Live – refreshed content highlighting local businesses, experiences and attractions from across Ontario.
- Sponsored Content – key impactful stories told through sponsored content on major publications.
- Social Media – dedicated coverage and storytelling through Destination Ontario's owned social channels featuring individual operators and businesses across the province.
- OTICs – on-the-ground support for travellers within Ontario with personalized trip and itinerary ideas.

Outcomes

With an investment of approximately \$4 million, the Ontario market campaign is expected to achieve the following results:

- Radio Reach: 2 million.
- Completed Video Views: 5.65 million.
- Leads: 225,000.
- Page views: 23.2 million.

These results are anticipated to generate 247,000 incremental visits and \$27 million in incremental expenditures.

Northern Marketing and Partnerships

Destination Ontario will continue to support the Northern tourism industry by working with partners across Northern Ontario. Through dedicated marketing efforts for the North, Destination Ontario will promote the region as both a destination and gateway to outdoor, culture and heritage experiences. The agency will continue to invest in and

support Ontario's avid tourism industries of angling, hunting, powersports touring and outdoor adventure.

Due to the closure of the U.S. border, a Pan-Northern campaign will not be executed this year into the U.S. market. Instead, Destination Ontario will continue with the spirit of the Pan-Northern partnership with a campaign targeted in Ontario and Manitoba (for the Northwest Ontario region) in the summer, fall and winter. The campaign will support the Northern region during these challenging times by encouraging Ontario and Manitoba consumers to travel to the North. The campaign will be developed in partnership with Destination Northern Ontario (RTO 13) and Northern DMOs, including Sunset Country, Superior Country, Sioux Narrows-Nestor Falls, Kenora, Thunder Bay, Algoma Country, Sault Ste. Marie, Northeastern Ontario, Sudbury, North Bay and Timmins.

The marketing objectives are to:

1. Create engaging messaging that builds consideration of Northern Ontario as a travel destination;
2. Promote Northern Ontario leisure (and avid when appropriate) experiences to domestic family and couples/groups of friends in summer, fall and winter through a collaborative brand and content-driven approach; and
3. Take advantage of a flexible campaign structure in which the product focuses on regional targeting and can expand as restrictions continue to ease.

Outputs

Operating through a growth market lens, and based on available research and regional product expertise, DMO partners will work with Destination Ontario and Destination Northern Ontario (RTO 13) to identify products/experiences of focus per season and thereby inform hero content for the Northern portal (northernontario.travel). Experiences promoted will include: soft outdoors, resorts/lodges, family fishing, avid fishing, ice fishing, leisure touring, avid touring, avid snowmobiling, arts and culture and urban attractions.

The campaign will drive awareness through halo advertising (video) and partner hero content focused on seasonal and regional experiences (digital ads, social media).

Outcomes

With an investment of approximately \$1 million, the Pan-Northern campaign is expected to achieve the following results:

- Completed Video Views: 1,750,000.
- Leads: 87,000.
- Page views: 6.764 million.

Ontario Live

Ontario.Live was created to support the culture, tourism and creative experiences during the COVID-19 pandemic. As the province begins to re-open safely, more businesses, experiences and attractions will open their doors. Destination Ontario will

refresh Ontario.Live for the immediate and long-term to help build the legacy of this initiative.

This will be achieved through two streams of work:

1. Evolution of existing site into a value-add experience for businesses, partners and operators that is innovative and manages costs; and
2. The modernization of Destination Ontario's web properties which is running a parallel track to Ontario.Live and anticipated to be ready by spring 2021.

United States and International Markets

Due to the on-going border closures and restrictions in place for travellers entering Canada; this fiscal year, Destination Ontario will not execute any marketing campaigns into these markets. Destination Ontario will continue to sustain strong relationships with travel trade and media relations, engaging these audiences with Ontario content for future travel.

Destination Ontario has initiated planning for marketing into the U.S. and key source international markets (China, Japan, South Korea, United Kingdom, Germany, France and Mexico) for when the time is right. Destination Ontario will work with travel companies and in partnership with Destination Canada to re-start marketing efforts market-by-market accordingly.

Industry Partnerships

Destination Ontario will continue to work with industry partners to maximize impact. A whole Destination Ontario team approach will be executed for marketing partnerships. Outreach and communication with industry across Ontario is important to Destination Ontario, and the agency will continue to improve in this area. As a result of COVID-19, it will be extremely important to engage with and support industry partners during these challenging times.

Where applicable, Destination Ontario will continue to build and deliver successful partnerships with RTOs, DMOs, sector associations, and Destination Canada, leveraging areas for collaboration and opportunity. Implementing the Destination Canada / Destination Ontario Domestic Recovery Marketing Support Program will be a key output this fiscal year and will serve as an extremely important part of supporting local businesses and tourism in communities.

Destination Ontario, as the lead provincial tourism marketing organization, will provide its expertise, learnings, research and market insights to tourism partners in order to support the industry's capacity to strengthen and grow. Destination Ontario will participate in stakeholder events virtually, providing knowledge directly to individual tourism operators. The agency will also share information through communication channels in order to provide tourism stakeholders with valuable understandings for their own operations.

Ontario Travel Information Centres (OTICs)

Destination Ontario's OTICs provide an avenue for tourists already in Ontario to receive information on destinations, attractions and product experiences. OTICs will use the visitor first approach to create recognized visitor information services and effective personalized customer service.

A staged approach to re-opening OTICs, following a pause due to COVID-19, will take place. An OTICs Re-Opening Plan has been developed in alignment with applicable operational safety and public health guidelines to help protect employees and visitors during the COVID-19 outbreak.

OTICs that re-open will operate with hours to meet limited travel demand. Travel Counsellors will also continue to work remotely and offer travel counselling services by phone and email.

Safety measures in place include plexi-glass installed at all OTIC counselling pods and the use of Personal Protective Equipment (PPE) such as disposable masks, disposable gloves, hand sanitizer and dispensers, disinfectant wipes. Training is completed to ensure all OTIC staff are adequately trained and prepared for re-opening and resuming delivery of services. Additionally, an Employee and Visitor Screening Checklist will be required for entry into OTIC.

Curbside pick-up will be offered where a visitor calls the OTIC from their vehicle to request information/materials – a travel counsellor will bring the materials directly to their vehicle in the parking lot (no entry into the OTIC required). For those visitors who still wish to receive in-person travel counselling services, there will be no access to the brochure racks (to avoid high touch points); rather, travel counsellors will pick and pack the brochures per visitor request.

Destination Ontario will determine OTIC re-opening dates in alignment with the Ontario government's *Framework for Reopening our Province* and individual OTIC operating considerations. The health and safety of OTIC staff and visitors will be the top priority.

Where it makes sense, OTICs will partner with tourism organizations and businesses to sell tourism experiences and attractions and offer onsite advertising and promotional opportunities to stakeholders. OTICs will provide customized travel advice on where to go and what to see and do with a view to extending visitor stay and visitor spend.

Destination Ontario will implement measures to improve and modernize the delivery of visitor information services, including findings from research and harmonizing service delivery by Destination Ontario and other visitor information service providers.

Measuring Results

Destination Ontario recognizes that measuring the results from marketing campaigns is important to demonstrate the value of investment. The agency plans to use an output and outcome performance measurement process including using several strategic

planning tools such as, an annual *Strategic Playbook* Scorecard, a quarterly Corporate Scorecard, a projection model, campaign measurement plans and marketing performance analysis.

INITIATIVES INVOLVING THIRD PARTIES

Partnerships are important to Destination Ontario's work and are an element of many of the organization's strategies and tactical executions. Destination Ontario regularly engages with stakeholders with the overarching goal of increased tourism visitation and spend in Ontario. The agency will cooperatively work with tourism stakeholders to build a stronger return on investment. Destination Ontario will leverage partnerships to extend market reach and generate economic impact for Ontario. Destination Ontario's partnerships staff will collaborate with RTOs, DMOs, sector associations, other provincial agencies and industry colleagues to build and grow ongoing partnerships that are mutually beneficial. In 2020-21, Destination Ontario will continue to raise awareness of opportunities for stakeholder engagement.

As mentioned previously, Destination Ontario is partnering with Destination Canada to deliver a \$13 million Domestic Recovery Marketing Support Program that supports local businesses and tourism in communities through hyper-local promotions.

INFORMATION TECHNOLOGY/ELECTRONIC SERVICES DELIVERY

Digital, Data and Technology Future

Destination Ontario will work to lead the industry in thought leadership and strategies to get a more unified view of the traveller.

As privacy and transparency laws change the marketing landscape, first party data is becoming increasingly more important. Marketers cannot rely on third party data to meaningfully target consumers.

Destination Ontario is planning a new vision for a web and digital strategy that places the visitor at the center of design and anticipates the technology needs of the future while remaining flexible and agile. In the meantime, Destination Ontario will continue to leverage its multilingual consumer websites (ontariotravel.net), and promote experiences, regions, and travel packages that connect consumers directly to industry partners to book their travel.

Destination Ontario will also continue to leverage a visitor first digital strategy that connects travellers with valuable and relevant content aligned to visitor passions. Travellers engage with Ontario travel content on Facebook, Twitter, Instagram, Pinterest, YouTube, WeChat and Weibo.

COMMUNICATIONS PLAN

Destination Ontario will actively work to share information that is relevant and timely with its stakeholders. Through its various communication channels, including social media, its corporate website (destinationontario.com) and communication to its partner database (more than 5,000 subscribers), Destination Ontario will generate awareness of its activities, programs, organizational successes and achievements.

Communication to the public and industry, through media relations engagement, will be focused on information that demonstrates the value and economic impact of the tourism industry and how Destination Ontario is contributing to building a stronger tourism industry.

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

PERFORMANCE MEASURES

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

	2018-19 Actual	2019-20 Actual	2020-21 Goal	2021-22 Goal	2022-23 Goal
Incremental Visitor Spending					
Ontario	N/A ¹	N/A ²	\$27M ³	\$38M ²	\$38M ²
U.S.	N/A ¹	\$64.4M	N/A ⁴	\$51M ⁵	\$51M ⁵
North America and Overseas (via trade channel)	\$29M	\$22.2M	\$3M ⁶	\$10M	\$15M

¹ Due to paused activity in 2018-19, no research vendor was procured or brand campaign.

² Marketing activity was cancelled due to business plan review.

³ Goal for Ontario based on a media investment output of \$4M that factors in pandemic impact on travel behaviour.

⁴ Due to Canada/U.S. border closure in 2020.

⁵ Goal for U.S. based on a media investment awareness-focused campaign of \$5M.

⁶ Due to COVID-19 and border closures, Joint Marketing Agreements in 2020-21 will be mainly focused on trade training, product development and driving bookings for 2021-22.

	2018-19 Actual	2019-20 Actual	2020-21 Goal	2021-22 Goal	2022-23 Goal
Media Relations					
Earned Media Relations (Advertising Value Equivalency or AVE)	\$65.7M	\$79.7M	\$10M ⁷	\$20M	\$30M
Travel Trade					
Number of Travel Trade Trained	3,193	7,741	4,000	3,500	3,500
Number of New Products Developed	47	111	20	20	30
Industry Partnerships					
Total Leads to Industry Partners	3,369,374	1,453,388 ⁸	1,440,000 ⁹	1,230,000	1,230,000
Partners' Cash Contribution Leveraged	N/A ¹⁰	\$186,650	\$250K ¹¹	\$300K	\$500K

⁷ Due to continued restrictions on travel, AVE is expected to be lower until travel returns to pre-pandemic levels.

⁸ Decrease from 2018-19 related to business strategy shift due to budget reduction; Ontario market on pause.

⁹ Goal reflects planned initiatives in the context of COVID-19 and anticipates travel restrictions from U.S., Mexico and overseas markets.

¹⁰ This performance measure was in development for 2019-20.

¹¹ Reduced due to partners ability to collaborate financially as a result of COVID-19.

Definitions:

Incremental Visitor Spending

Incremental Visitor Spending – Ontario and U.S.

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

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

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

Media Relations

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

Travel Trade

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

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

Industry Partnerships

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

- From ontariotravel.net (for markets in Canada, United States, France, India, Brazil, United Kingdom, Mexico, Japan, South Korea, Germany and China).
- 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 Corporate Services will continue to improve workplace practices and performance through implementation of identified efficiencies, training, advisement, and other supports. Corporate Services will also support the Destination Ontario team with new realities due to COVID-19. For example, it will provide support to staff now working remotely and set up approvals processes electronically. Corporate Services will also be a key team in helping support the fast-moving approvals required to deliver on recovery plans.

As government policies and directives are rarely static, and undergo review and changes on a regular basis, Corporate Services will continue to provide guidance and direction on relevant topics. In addition, process improvement measures, such as the Project Approval Form and internal routing document, have been implemented in order to ensure appropriate control measures and Delegation of Financial Authority is adhered to and well documented. Staff will continue to be encouraged to seek opportunities for learning and development via the Ontario Public Service (OPS)-wide platform 'LearnON', as well as internal developmental opportunities, including knowledge sharing and cross-collaboration across the organization.

During the 2019-20 fiscal year, Corporate Services hosted all-staff training on Records Information Management and provided a refresher course on Freedom of Information. Interested staff were also provided the opportunity to participate in a two-day Mental Health First-Aid course in order to further bring awareness and support this important initiative. Corporate Services will continue to organize relevant and timely workshops for staff to improve efficiencies and knowledge within the organization and to ensure that all employees are following OPS guidelines and directives as required.

Performance plans will be based on the following priorities:

- Continue to take a visitor first approach and inspire travellers through their passions, interests and needs. With a focused lens on the strengths of inclusiveness and diversity, showcase Ontario's beautiful landscapes, big cities and charming towns, festivals and events, and iconic attractions where visitors can embrace and celebrate culture.
- Continue to work with and lead partners to align and collaborate by leveraging marketing and assets in all markets. Build alignment and collaborate across the Ministry's portfolio and specifically with Ontario Creates.

- Continue to develop a holistic research approach, prioritizing how data is used, collected and analyzed to better understand the visitor and grow visitor visitation, expenditures and economic impact for Ontario businesses.
- Connect, lead and inspire a collaborative approach among staff and partners. Continuing to build a culture that is inclusive, modern and forward-thinking, resulting in a dynamic organization.

RESOURCES NEEDED TO MEET GOALS AND OBJECTIVES

Destination Ontario's allocation for 2020-21 is confirmed at \$32,967,500. Budget line items have been strategically aligned to meet the current environment with COVID-19 and incorporate plans to help the industry in recovery and rebuild efforts. The budget also reflects the agency's three-year strategic plan and promotes cross-functional teams based on key marketing activities and markets. Destination Ontario works with Ministry staff to identify future capital needs.

In 2019-20, Destination Ontario's grant allocation was decreased by \$5M (13.2%) from the previous year's allocation. To achieve required savings, the agency identified board approved transformative actions to create organizational efficiencies and focus on programs and activities that deliver the best return on investment. Efforts were also made to protect investments in marketing activities that generate a strong economic impact for the tourism industry. Destination Ontario will continue to work with its board and the Ministry to move forward with the best ways to utilize resources to meet the goals and objectives, especially investing in the agency's principal mandate to lead provincial tourism marketing in Ontario.

FINANCIAL BUDGET AND STAFFING

Financial Budget

DESTINATION ONTARIO

2020-21 THREE YEAR PROPOSED BUDGET

(\$ 000's)

PROGRAM	BUDGET 2018-19	PRIOR YEAR BUDGET 2019-20	CURRENT BUDGET 2020-21	PROPOSED BUDGET 2021-22	PROPOSED BUDGET 2022-23
Revenue:					
Province of Ontario	37,968	32,968 ¹	32,968	32,968	32,968
Advertising Sales Revenue (OTIC Advertising, Social Media, etc.)	274	250	50	50	50
Partnership Contributions	1,272	785	6,000	785	785
Travel Information Centres Merchandise: Cost Recovery	1,000	700	500	800	800
Travel Information Centres Revenue: Merchandising Profit	170	100	70	120	120
	40,684	34,803	39,588	34,723	34,723
Expenses:					
Marketing (active in multiple markets)	18,579	17,444	12,888 ²	16,193 ³	16,802 ³
Partnership Support	2,371	475 ⁴	9,047	475	475
Marketing Intelligence & Business Strategy	750	680	400	1,000	1,000
Tourism Consumer Information Systems	4,000	3,496	5,036	500 ⁵	250
Future Web and Data Strategy	-	-	2,540	2,500	2,000
Travel Information Centres	3,178	2,732	3,232 ⁶	2,773 ⁵	2,815
Salaries and Wages - Travel Information Centres	3,122	2,960	2,974	3,048	3,125
Salaries and Wages - Head Office	6,181	5,942	5,801	5,946	5,933
Corporate Communications and Governance	137	87	57	90	90
Corporate Operations and Overhead	893	987	1,163	1,198	1,234
Opportunities Fund / Contingency	1,473	- ⁷	-	1,000	1,000
	40,684	34,803	43,138	34,723	34,723
Net Revenue	-	-	(3,550) ⁸	-	-
Carryover Funds	-	-	3,550 ⁸	-	-
Surplus (Deficit)	-	-	-	-	-

¹ Destination Ontario received a decrease of \$5M in 2019-20 allocation.

² 1) Ontario; 2) U.S. short-haul/rubber tire [Illinois, Michigan, Minnesota, Wisconsin, Ohio, New York, Pennsylvania, Massachusetts, and District of Columbia]; 3) Manitoba; 4) Quebec

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

⁴ Re-defined to include Direct Transfer Payments to Associations (Attractions Ontario, Resorts of Ontario, Festival Events Ontario, and Tourism Industry Association of Ontario) only.

⁵ Reserve fund to pay for trailing obligations from decommissioning Tourism Consumer Information System.

⁶ Year-over-year increases due to increasing operating costs and capital needs and measures to improve and modernize the delivery of visitor information services to be explored.

⁷ Destination Ontario unable to allocate funds to Opportunities Fund in fiscal 2019-20 due to uncertainty in discretionary spending freeze.

⁸ The projected deficiency of revenue in 2020-21 will be offset by surplus funds resulting from deferred and/or cancelled marketing activities in late 2019-20 due to COVID-19.

Staffing

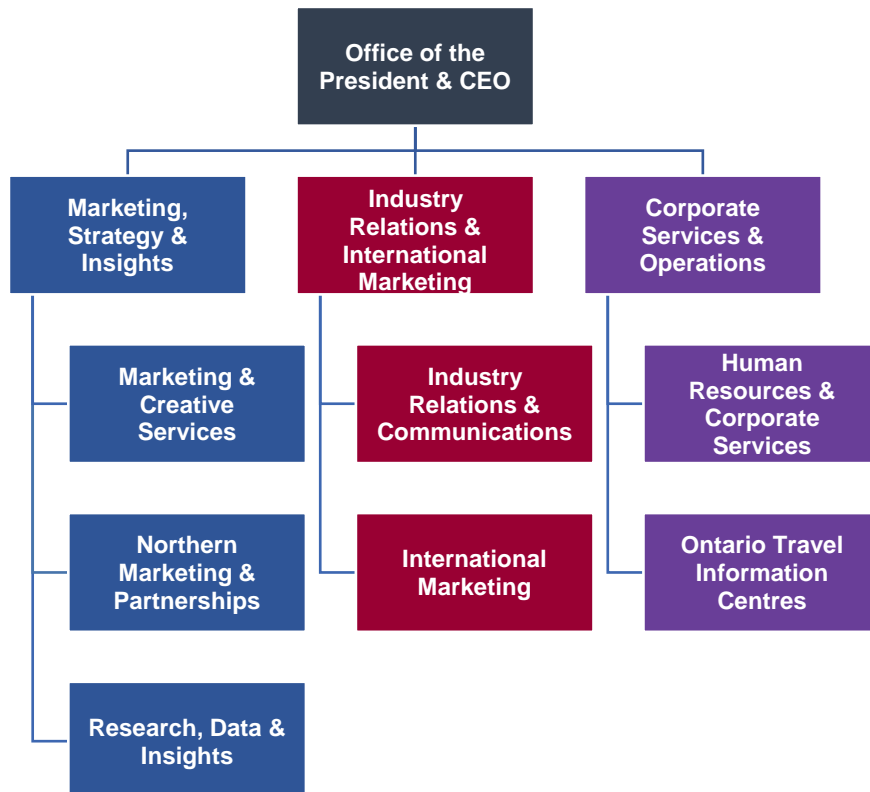
Destination Ontario is comprised of 84 Full-Time Equivalents (FTEs) composed of Association of Management, Administrative and Professional Crown Employees (AMAPCEO)-represented positions, Ontario Public Services Employee Union (OPSEU)-represented positions and management positions.

In 2019-20, Destination Ontario exercised its option to use the OPS-wide Transition Exit Initiative and Voluntary Exit Program. Staff who opted for this program exited the OPS by December 31, 2019 and Destination Ontario used this opportunity to review the organization's structure and implement changes to flatten the organization and find further efficiencies.

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

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

ORGANIZATIONAL CHART



EXPECTED GOVERNMENT APPROVALS

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

RESPONSE TO THE EXPECTATIONS SET OUT IN THE AGENCY MANDATE LETTER

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

Destination Ontario will continue to develop world-class marketing and through programs and activities inspire visitors to travel within Ontario, as well as attract visitors from around the globe when the time is right.

Destination Ontario will deliver a strong Ontario brand that showcases experiences to Ontarians and visitors from around the world and integrates the positive impact of heritage, sport, tourism and culture together. This will be achieved by continuing to build partnerships and collaborating with RTOs, DMOs, sector associations, Destination Canada and other partners.

Destination Ontario will work with the Ministry, other agencies of the Ministry, and all industry sectors of the Ministry, to further drive tourism visitation and economic impact to all areas of the province. The agency will also work closely with the Ministry to align activities to government priorities, including the new Ontario tourism plan, once launched.

The agency will continue to exercise good governance and effective oversight and make improvements wherever possible. Destination Ontario will also work with the Ministry to deliver upon recommendations from the Agency Review Task Force.

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 organization will help to further grow the potential of the industry in order to increase economic impact and job creation.

RISK IDENTIFICATION, ASSESSMENT AND MITIGATION STRATEGIES

Likelihood Definitions:

Low - unlikely the risk will happen

Medium - likely the risk will happen

High - very likely the risk will happen or already happening

Impact Definitions:

Low - minor impact to strategic priority in relation to cost, quality, time and other impacts

Medium - moderate impact to strategic priority in relation to cost, quality, time and other impacts

High - significant impact to strategic priority in relation to cost, quality, time and other impacts

Risk Category	Risk	Likelihood	Impact	Mitigation Strategies
Delivering on Mandate	Insufficient budget to execute effective campaigns due to constrained annual allocation.	High	High	<p>Destination Ontario management works with PHD (its Agency of Record for media buying services) to balance audience reach with scale of media buy budget. There would still be an impact on results and would be relative to budget shortfall.</p> <p>Destination Ontario undertakes a value for money assessment of all business lines as part of annual operational planning.</p> <p>Potential reduction in markets.</p>
Delivering on Mandate	Higher media buying and production costs in traditional, yet effective, media channels such as TV.	High	Medium	<p>Destination Ontario management works with PHD (its Agency of Record for media buying services) to balance audience reach with scale of media buy budget, however, Ontario's tourism profile is reduced.</p> <p>Destination Ontario strategically targets markets of highest return, allowing for a focused approach.</p>

Delivering on Mandate	External/environmental factors and global events (i.e., protests) may have a negative impact on global travel patterns.	Medium	Medium	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. In addition, Destination Ontario has some program flexibility to shift strategy according to current conditions. Depending on the issue/event, there would still be an impact to results.
Delivery / Operational	Delays in programming approvals, may result in a negative impact on stakeholder relations.	Medium	Medium	<p>All projects have developed critical paths that partners are consulted on as much as possible. Regular communications exist with Ministry on key initiatives. Project management discipline is applied to project deliverables.</p> <p>Where issues are identified, stakeholder management strategies are engaged so that partners are up to date on government direction.</p> <p>Despite best efforts in terms of communication and outreach, some stakeholders will remain dissatisfied if projects are discontinued, and direction does not align with business needs/business planning timelines.</p>

<p>Delivery / Operational</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 continued economic insecurity and fear of contracting COVID-19.</p>	<p>Medium</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 FCB (its Advertising Review Board procured Agency of Record for marketing and creative services) to develop research insights informed impactful marketing campaigns.</p> <p>Destination Ontario works with PHD (its Agency of Record for media buying services) to balance audience reach with scale of media buy budget, however, Ontario's tourism profile is being reduced.</p> <p>Destination Ontario uses a collaborative approach with the Ministry and tourism industry as a whole by working with internal and external clients to best deliver on Ministry direction and Destination Ontario's corporate mandate.</p>
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<p>Delivery / Operational</p>	<p>There is difficulty in determining the right timing for undertaking tourism and travel related marketing, which is dependent on traveler's behaviour data (when people will feel safe and confident with travelling domestically and/or internationally). Destination Ontario is dependent upon broader government direction on timing.</p>	<p>Medium</p>	<p>Medium</p>	<p>Destination Ontario will follow closely the direction of health authorities, all levels of government, industry partners and leading research organizations, to get the most current and expert data related to how COVID-19 is impacting travel and the tourism industry not only in Ontario but worldwide.</p>
<p>People / Human Resources</p>	<p>Due to Bargaining Unit (Union), salary caps, fixed headcounts (FTEs) and OPS hiring restraints, challenges exist in creating an organization that is structured to meet evolving needs of a marketing organization which includes attracting and retaining the best-qualified staff in a dynamic marketing and media environment. This may result in lower staff morale and less confidence from stakeholders.</p>	<p>Medium</p>	<p>Medium</p>	<p>Destination Ontario has a dedicated HR Manager who liaises with key Ministry partners to ensure in-house needs are met in a timely manner, in addition to providing direct staff support and counseling.</p> <p>Ontario Shared Services, HR Advisory Services and Labour Relations provide 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>Dedicated Strategic Business Units (SBUs) provide Destination Ontario senior executives with advice, plan and broker services to support attraction and retention of diverse talent, build capacity to sustain a world class organization and engage employees to achieve results.</p>

<p>Delivery/Operational - Information Risk</p>	<p>Ineffective or inappropriate performance measures can negatively impact program management and results.</p>	<p>Medium</p>	<p>Medium</p>	<p>A dedicated marketing metrics committee of the Board reviews and provides direction on performance measurement, setting targets and reporting tools.</p> <p>Destination Ontario Management has reviewed and revamped the Corporate Scorecard to align with Strategic Pillar #3 – Strong Research, Strong Outcomes, in order to better measure success.</p> <p>Without the appropriate investment and funding, the organizations’ Key Performance Indicators (KPI’s) are at risk.</p> <p>Destination Ontario conducts stakeholder surveys, monitors and responds to comments throughout the year. A performance dashboard is completed for all campaigns.</p>
<p>Strategic / Policy</p>	<p>The risk of mandate/direction change for Destination Ontario due to delay in the release of the Ministry’s new tourism plan.</p>	<p>High</p>	<p>Medium</p>	<p>Destination Ontario uses a collaborative approach with the Ministry and tourism industry as a whole by working with internal and external clients to best deliver on Ministry direction and Destination Ontario’s corporate mandate.</p> <p>Destination Ontario continues to await instruction and direction with respect to the Ministry’s development of a plan to ensure that marketing initiatives are correctly aligned.</p>
<p>Strategic / Policy</p>	<p>Uncertainty of the outcomes of government responses to COVID-19 and the impact on tourism.</p>	<p>Medium</p>	<p>High</p>	<p>Destination Ontario’s recovery activities will be designed with maximum flexibility to appropriately adapt and complement other government initiatives that are being delivered in parallel.</p>

<p>Stakeholder Satisfaction / Public Perception</p>	<p>Falling stakeholder satisfaction and failure to meet the expectations of the public, other governments, ministries, or tourism industry stakeholders will negatively impact government's and Destination Ontario's reputation.</p>	<p>Medium</p>	<p>High</p>	<p>Collaborative approach: Destination Ontario undertook extensive consultations with industry and partners in the development of its three-year <i>Strategic Playbook</i>. Engaged stakeholder advisory committees to share industry intelligence. Industry surveyed annually, and responses analyzed to address identified issues through Destination Ontario programming and/or communications activities. Stakeholders are notified of changes to operations or programs.</p> <p>Due to budgetary reductions, Destination Ontario has streamlined financial contributions to various partner programs.</p>
<p>Stakeholder Satisfaction/Public Perception</p>	<p>Social media presence exposes Destination Ontario to negative external comments or inadvertent misuse by staff leading to public embarrassment.</p>	<p>Medium</p>	<p>Medium</p>	<p>Destination Ontario works with the Ministry's Communications team when potential public issues are identified to proactively address potential issues. 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.</p>
<p>Stakeholder Satisfaction / Public Perception</p>	<p>COVID-19 has seen a significant negative economic impact causing noticeable changes in public behaviour and Canadians are worried about their finances, job prospects, and are delaying major purchases including travel.</p> <p>Community sentiment towards tourism may continue to be low.</p>	<p>High</p>	<p>Medium</p>	<p>Destination Ontario is using proprietary market research tracking to understand public attitudes and behaviours in Canada and other countries to inform strategic and tactical planning.</p>

Stakeholder Satisfaction / Public Perception	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.	Medium	Medium	Destination Ontario assists and advises tourism stakeholders on how to minimize risk when buying programmatic ads.
Technology	COVID-19 crisis is putting a strain on technology (e.g. internet, social media) and there is a potential for negatively impacting project development and implementation.	Low	High	Destination Ontario has successfully transitioned to having staff working remotely in response to COVID-19. Destination Ontario’s project will employ a variety of delivery strategies that will consider the use of technology and how it may impede implementation.
Technology	Destination Ontario's web presence exposes it to cyber-attack and external privacy breach.	Medium	Medium	Any new technology developed is reviewed by Provincial Government Privacy Impact Specialists; and revisions are made based on their recommendation.
Technology	Inability to function effectively due to strict OPS I&IT standards created for protecting government and personal information.	Medium	Low	Where barriers are identified, Destination Ontario works with Ministry colleagues to enhance permissions for digital marketing and data collection. Destination Ontario seeks supplementary I&IT approval and exemption for access to OPS restricted applications in order to proceed with required marketing business activities.
Technology	Reluctance from industry stakeholders and partners as we change and evolve to using new marketing technologies.	Low	Low	Destination Ontario provides support and guidance by means of education and licencing tools to support and enhance digital growth to its industry partners.

Governance/ Organizational Risk	Failure to meet deadlines and requirements could contravene regulations and directives.	Low	High	Destination Ontario works with the Ministry to meet timelines and reporting criteria.
Governance/ Organizational Risk	Non-compliance with established policies and directives may result in issues for: financial accounting, employee relations, accountability requirements, and reflect negatively on the organization.	Low	Medium	<p>Corporate Services continues to educate all Destination Ontario staff by means of 1:1 training, regular unit meeting and mandatory workshops on financial processes and business processes. The Board's Audit Finance and Risk Committee reviews risk, quarterly management report and year-end and in-year audits.</p> <p>Contract Management and OPS Legal review all new and existing agreements in order to minimize risks and ensure maximum accountability.</p>
Governance/ Organizational Risk	Failure to address the recommendations of external reviews could draw negative attention from stakeholders.	Low	Medium	Destination Ontario works with Ministry colleagues to address any recommendations coming out of audits or reviews. Board appointees receive Public Appointments Secretariat training on governance and accountability for public boards. Where additional documentation or due diligence can be implemented, Destination Ontario takes a proactive approach in addressing and documenting where appropriate (i.e., travel expense claim documentation).

<p>All Other Risks</p>	<p>Capital upgrades are not undertaken because premises are leased. Capital needs have been limited and no capital funding has traditionally been provided to Destination Ontario.</p>	<p>High</p>	<p>Medium</p>	<p>All Destination Ontario property arrangements continue to be managed by Infrastructure Ontario.</p> <p>Third-party private lease at the 10 Dundas St. East head office expires June 30, 2023. Toronto and Sarnia OTICs are also under third-party private leases managed by Infrastructure Ontario. DO will continue to review and manage its realty needs within its budget and in alignment with OPS-wide direction.</p> <p>Threat Risk Assessments (TRAs) are currently underway for OTIC locations under the guidance of Infrastructure Ontario. Depending on the outcome, there may be the need to make repairs or adjustments.</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 (e.g., health and safety), that address code and legislation compliance, and that are considered at risk of imminent breakdown.</p>
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