



MAPPING ONTARIO'S TOURISM FUTURE

A Five-Year Look Back at the
Ontario Tourism Competitiveness Study

November 2014

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1. Introduction

In February 2009, the Ontario government released the Tourism Competitiveness Study Report, *Discovering Ontario: A Report on the Future of Tourism* (the "Study" or the "Report") also referred to as the Sorbara Report. The Study was undertaken with a view to "set a future path for tourism in Ontario." The mandate was straight forward:

"To develop a plan — including specific steps for the public and private sectors — to support the growth and long-term viability of tourism in Ontario. The Study's ambition is to demonstrably strengthen Ontario's tourism sector over the next decade and beyond."

The Study process was designed to ensure input from across not only the tourism industry but also a broader cross-section of the Ontario economy through province-wide consultation sessions and written submissions.

In the Report four key strategies, supported by twenty recommendations, were proposed to increase tourism and economic activity and make Ontario a top tourism destination. The twenty recommendations outlined in the Report were provided as advice to government as opposed to a comprehensive strategic plan for Ontario tourism. Since 2009, the Ministry and industry partners have focused on implementing key recommendations from the Report. Achievements and progress to-date are a result of the combined efforts of the Ministry and tourism industry partners.

A. CONTEXT OF THE COMPETITIVENESS REPORT

The period leading up to the initiation of the competitiveness Report—from 2000 to 2008—was tumultuous. Ontario's tourism industry faced significant change given a host of unforeseen external factors that resulted in some positive, but mostly negative, impacts on business volumes and customer service. For example:

- SARS put Toronto on the map, in the worst of ways.
- Exchange rates provided a temptation for Canadian tourism businesses to incorporate a significant "discounting" marketing message.
- Increased cross-border security concerns (prompted by 9/11) resulted in a less porous Canada-U.S. border and, eventually, a requirement for all visitors to carry a passport.

Arguably, even more change occurred since the Report was completed:

- The Canadian Tourism Commission ("CTC"), facing budget constraints, diverted international marketing efforts to emerging source countries at the expense of the United States.
- At the same time as the CTC turned away from the U.S., Brand USA came online with a potential US\$200million/annum marketing budget. Canada was identified as a key market focus.
- The exchange rate differential reversed, with the Canadian dollar strengthening against most foreign currencies, notably the U.S. Dollar, British Pound and Euro, prompting even more outbound trips by Ontarians and Canadians.

- The number of city-pair flight offerings between Canada and the U.S. has increased substantially—given increased competitiveness and growth of start-up airlines such as Porter—but much of the usage has been Canadians travelling outbound.
- The number of Americans carrying passports (enabling foreign travel) has never been higher but Canada has not been a top-of-mind destination.

Change is inevitable. Therefore the Ontario tourism industry must not only address internal structural, budget, regulatory and policy challenges but also a host of external and largely uncontrollable factors. Flexibility, nimbleness and the ability to react quickly will separate winners from losers over the next decade and beyond, as tourism remains one of the most competitive international industries.

B. OBJECTIVES OF THE 2014 REVIEW

The five-year anniversary of the Report's completion was believed to be an appropriate time to re-engage the industry to:

- assess stakeholder perspective of the current status of Ontario's tourism industry;
- validate the relevance of the recommendations;
- collect information to support future planning; and,
- continue to build on the successes to date by continuing to work with industry partners to identify priorities that address current needs and advance the tourism sector.

As a result the Tourism Industry Association of Ontario ("TIAO"), working with HLT Advisory ("HLT"), was charged with the responsibility of leading a province-wide consultation process designed to:

- Engage tourism industry partners to identify priority recommendations, and to address the current needs and goals, in order to grow the tourism industry in Ontario over the next three to five years.
- Support recognition of the tourism industry for its contribution to Ontario's economy and workforce.

The following sections outline the findings from this process.

C. SCOPE OF WORK

The review undertaken by TIAO and HLT involved:

- Development of background documentation, schedules, a dedicated webpage, communication planning and initial contacts.
- Development of "straw man" priorities list based on input from the TIAO Board and broader membership. The intent of this exercise was to focus discussion and input on five priorities (drawn from among the Report's twenty recommendations) as a starting point, while remaining open to all other relevant input.

- Communication of the review process to ensure maximum input and participation including attendance at workshops and submissions of written statements/position papers.
- Conducting sixteen half-day workshops, one in each Regional Tourism Organization ("RTO") area (including each of RTO 13 A, B and C) as well as two in the greater Toronto area. A separate session was undertaken with representatives of the Ministry of Tourism, Culture and Sport ("MTCS"), other Ontario ministries and several tourism-related agencies.
- Conducting a post consultation session e-survey designed to gather additional insights through an anonymous and confidential process as well as to follow up on priorities.
- Monitoring, responding, tracking and logging all submissions received over a dedicated email: TIAOlistens@hlta.ca.
- Synthesizing all input and developing recommendations via an interactive process among the TIAO Board.
- Preparation of draft and final reports.
- Presentation of the findings at the Ontario Tourism Summit.

Details on the process are summarized in Appendix A.

D. THE PRIORITY AREAS

Consultation with individual TIAO Board members, the Board as a whole, and the TIAO membership at large identified five priority areas from among the twenty recommendations contained in the Report. The purpose of defining five priority areas was to focus discussion during the consultation sessions as well as for the written submissions. The priority areas were presented at the consultation sessions (and in materials soliciting written responses) without any ranking/ordering. Further, and finally, all participants (consultation sessions and those providing written submissions) were encouraged to identify any other areas of interest affecting Ontario tourism not addressed among the five priorities.

The five priority areas (and the associated recommendations from the Report) are summarized below:

- **Leadership:** For Ontario's tourism industry to fulfill its potential as a destination, and as a contributor to the economy, it needs a highly visible and sustained commitment from the Premier and Cabinet. (Recommendation 6).

Setting meaningful targets (Recommendation 1) is a function of leadership and should be incorporated into any future plan.
- **Investment:** The need for public- and private-sector capital investment in tourism crossed several Tourism Study recommendations including transportation infrastructure (Recommendation 10) and product development/enhancement (Recommendations 11 – 13, 15).

- **Marketing Strategically:** Ontario should market its destinations and experiences by focusing on our strongest existing international markets; prioritizing new and best-prospect markets like Mexico, Brazil, India and China; strengthening our appeal to French-speaking markets, especially Quebec; expanding our reach to new Canadians and their families; and continuing to focus on the strong domestic Ontario market. (Recommendation 17).
- **Product (Experience):** Ontario should focus on the unique product offerings of regions including natural experiences and our great water assets as well as niche tourism experiences such as sports, cultural, culinary, eco and agricultural tourism. (Recommendation 18).
- **Regional Structure:** Ontario should establish tourism regions to better coordinate tourism marketing and management across the province. Each region should work towards creating a unique brand and a stellar experience within a provincial brand. There should be one Destination Marketing and Management Organization for each region. (Recommendation 2).

A range of other topics and issues were discussed at each consultation session. As well, written responses were received that addressed several additional areas of concern and opportunity. During the consultation process an e-survey of attendees was commenced to permit additional thoughts, recommendations, concerns and challenges to be identified after individual consultation sessions.

Several additional recommendations from the Report were raised as priorities. The entire list of original recommendations is included in Appendix B. The results of the e-survey are included in Appendix C.

2. General Observations

The Study notes that "For far too long, tourism has been viewed as a sidebar in the overall makeup of the provincial economy. As a result, the industry has received less profile than is warranted and less public support than is its due. That needs to change. The contribution from a stronger, more dynamic sector could make tourism a fundamental building block of the next Ontario economy."

The Report goes on to note that "Ontarians need to understand the significant benefits of a stronger tourism industry. On average, an overseas visitor to Ontario spends over \$1,200 while in the province. That spending impacts positively on the entire economy. Tourism generates significant employment, especially for new entrants to our workforce. Nearly 200,000 people are directly employed in this industry. It is the number one employer of young people in the province. The tourism industry is primarily composed of thousands of small and medium-sized enterprises that are the foundation of our provincial economy. And most importantly, when we invest in and develop destinations and experiences that attract the interest of tourists, those same attractions and experiences enhance the quality of life for 13 million Ontarians."

In conclusion, the Report notes that "[the Study] is decidedly ambitious for a stronger tourism industry for Ontario. We have set out one overarching goal: Ontario will become one of the world's preferred places to visit. Ontario has the potential and all the necessary elements to be a leading tourism destination. To get there, Ontario will aim to double tourism receipts by 2020."

With this background and these objectives in mind, the five-year review of the Study sought to gain a current understanding of challenges and opportunities facing the industry. A number of general observations are noted below.

A. WHY IS GOVERNMENT IN THE TOURISM INDUSTRY?

Government's influence on tourism varies across jurisdictions but is always present to some degree given certain responsibilities. Often, these responsibilities exist primarily for the benefit of residents but also have a role in accommodating visitors, such as:

- Custodial role for art, culture and science via the operation of museums, art galleries and related attractions.
- Custodial role for recreation, parks and outdoor resources.
- Coordination and operational role in bidding for, hosting and/or staging events, festivals and significant celebrations.
- Promotional and operations roles for sports, sport facilities and sporting events (including bidding and hosting).
- Economic development including a cross-section of investment attraction and business promotion activities.
- Operation of transportation, interpretive and related infrastructure.

In addition to these roles, governments take on sales and marketing, product, workforce development and a host of support roles necessitated by the preponderance of small- and medium-sized enterprises that comprise tourism. The tourism "industry" in most Canadian (and many international) jurisdictions has come to expect active public-sector involvement as much out of need as desire.

Beyond the foundational level of support however, governments (in this case provincial governments) can play a significant role in affecting the strength, position and success of tourism by defining:

- What role tourism plays in the provincial economy?
- How tourism is viewed in the context of broader government decisions (i.e., what is the impact of tourism from a decision taken in finance or forestry or transportation)?
- The balance between intra-provincial tourism and inbound tourism together with clarity on the relative importance of each (and the degree to which each is supported financially).

In short, government is involved in tourism because it has to be. But the extent to which tourism is positioned as an economic activity is a choice.

B. HOW ARE TARGETS SET AND SUCCESSES MEASURED?

The Report's goal of doubling tourism receipts by 2020 sets direction but fails to lay out the detail necessary for implementation. In addition to an overall target, specifics are required that address:

- Visitation targets by source (i.e., within Ontario, elsewhere in Canada, United States, international).
- The value of in-province versus out-of-province visitation (i.e., is a dollar spent by an Ontarian travelling within the province viewed equally as a dollar spent by a non-Ontarian?).
- Return on investment thresholds linked to marketing or any other tourism-related investments (i.e., how should government tourism investment be allocated between in-province tourism and in-bound tourism initiatives?)
- How success will be measured, monitored and communicated.

Without targets (and clear communication of targets) the mandate and actions of MTCS, Ontario Tourism Marketing Partnership Corporation ("OTMPC"), RTOs, DMOs and sector associations cannot be aligned. For example, a target of doubling visitation from in-bound visitors to Ontario requires a completely different set of activities (e.g., a focus on a small number of high-potential, easily-accessed destinations such as Toronto, Niagara Falls and Ottawa) than a target focused on broad support of tourism as an economic development tool at the local level (e.g., funding support for local events/festivals). Setting targets means hard decisions on amount, place and type of investment.

C. HIGH IMPACT OR BROAD COVERAGE?

The lack of detailed targets, success measures and rewards has created an environment where decisions to deploy limited resources are too easily made on the basis of ensuring every region gets some benefit. Often political considerations enter the decision process notably in grant programs where criteria for obtaining project and event support is unclear.

This approach (like “spreading jam on toast”) may provide benefits at regional and local levels but may not create maximum industry growth at a provincial level. Without targets, resources cannot be appropriately directed to applicable destinations, products or experiences (and monitored for success).

D. ONTARIO IS NOT UNIQUE...BUT DOES HAVE CONSIDERABLE STRENGTHS

Much of the tourism product offered and promoted by Ontario (at the provincial, regional/destination and private-enterprise level) is not unique in a world of growing tourism competitiveness. Ontario’s waterways are shared with several other provinces and states. Commercial attractions, culinary offerings, casino gaming, hunting/fishing and the like are offered in numerous locations.

The challenge confronting the Ontario tourism industry is to identify exceptional primary and ancillary experiences and position these experiences for maximum market acceptance while recognizing that “uniqueness” will be perceived differently by different markets.

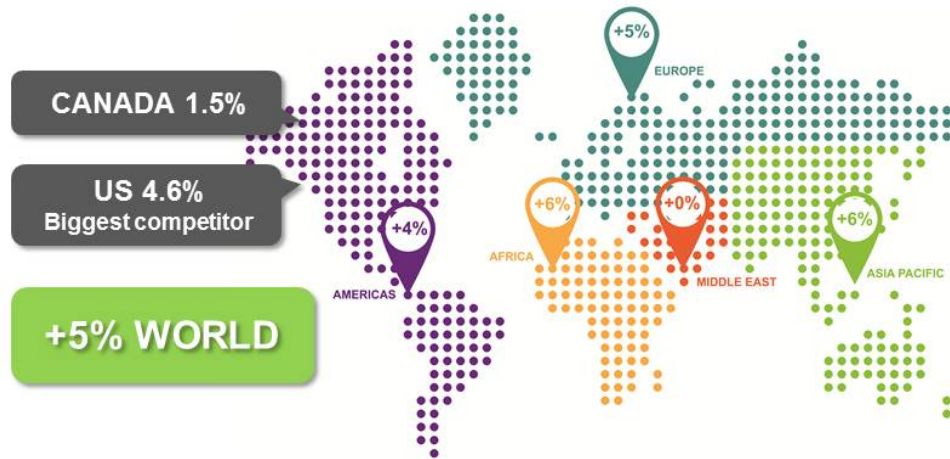
E. WANTING TO BE A TOURISM DESTINATION...DOESN'T MEAN YOU ARE (OR SHOULD BE) ONE

The market-readiness of tourism product is perceived differently by different consumers (i.e., an Ontario-based day visitor will have different expectations than an international overnight visitor). However, the democratization of tourism (a sense of entitlement where the widest imaginable range of communities, venues, and events self-identify as tourism product in order to obtain public-sector resources and support) has created a culture where tourism is believed to be a “right”. This culture has now been extended to a belief that if product doesn't exist it should be created through public sector largesse.

F. BENCHMARKS FOR ONTARIO TOURISM SUCCESS

It was generally agreed that Ontario’s tourism industry should be keeping pace with the global growth of tourism – currently at a rate of 5% per year. Maintaining the Ontario visitor base is important to keep the industry’s doors open, but real growth will only be realized by increasing the number of international visitors and associated visitor spending. In order to achieve this growth rate, the process produced 27 recommendations across the identified priority areas as well as several additional recommendations.

Global Visitor Arrivals Are Strong (% Increase)



UNWTO Arrivals 2013, Tourism Industry Association of Canada

Achieving growth of this magnitude will require modification of current practices.

3. The Five Priority Areas

Working with the TIAO Board and broader TIAO membership, five priority areas were identified from the twenty recommendations contained in the Competitiveness Study. The priority areas, which were selected to focus discussion at each of the sixteen consultation sessions, are:

- Leadership
- Investment
- Marketing strategically
- Product/Experience
- Regional Structure

The priority areas are listed in the order discussed at the consultation sessions and elaborated on below in the same order with no intention of ranking or ordering by importance.

Following the consultation sessions, HLT issued an e-survey to all participants to capture additional thoughts and input. The survey also asked participants to rank the priority areas in order of importance. Leadership (first priority overall of 38%; first and/or second place of 54%) and marketing strategically (46% first and/or second place) led as the top two priorities. The complete survey results are included in Appendix C.

Additional priorities/issues were identified at each session and through the written submissions. These are discussed in the following chapter.

A. LEADERSHIP

The Report notes that “leadership means two things to the tourism industry: acknowledgment of its contribution to the economy and a whole-of-government approach to tourism.” The Report also notes that effective leadership requires “sustained attention to progress” which is why targeting (the first recommendation in the Report) was added to this discussion.

Competitiveness Report Recommendation #6: Encourage Leadership

For Ontario's tourism industry to fulfill its potential as a destination, and as a contributor to the economy, it needs a highly-visible and sustained commitment from the Premier and Cabinet.

Competitiveness Report Goals:

- Tourism has a higher profile and Ontarians are more aware of its contribution to employment and economic development.
- Government resources are allocated in a more focused and effective way to support tourism industry growth.
- There is clear and measurable progress toward maximizing the competitiveness of the tourism industry.
- Investment and infrastructure funding decisions incorporate tourism priorities.

Related Competitiveness Report Recommendation #1: Set Targets

Ontario should set its sights on becoming one of the world's preferred destinations. It has the potential and all the necessary elements it needs to be a leading global destination. By 2020, Ontario will aim to increase the economic contribution of tourism by doubling tourism receipts.

Competitiveness Report Goals:

- All industry players and government will be united toward a common goal and committed to the measurement of success.

Context and Implementation:

What is leadership? A written submission received at TIAOlistens@hlta.ca spoke to several key attributes. Leaders need to be **visible**. To be seen as the focal point and rallying agent, regardless of the support networks and infrastructure required to actually deliver leadership. Leaders need to be **consistent**. Strategies and plans are developed, rolled out, monitored and tweaked (even discarded if necessary) but the follow through and dedication to delivery provides consistency. Leaders need to be **enabling**. The mark of a good leader is enabling the provision of necessary resources, eliminating obstacles and ensuring optimal conditions so that the team can deliver on the strategy. Finally, leadership needs to be **sustainable** over a period of time, regardless of interjecting events and with ordered transition to ensure the strategy is carried through.

The recommendation references leadership as an initiative/activity provided by "Premier and Cabinet." However, while the Premier attended the 2013 Ontario Tourism Summit (the first time a Premier has attended), since the Study was completed:

- The Ministry of Tourism (2008) became the Ministry of Tourism and Culture (2010), and finally the Ministry of Tourism, Culture and Sport (2011). In the past ten years (and under the same government), tourism has been the responsibility of five different Ministers and five different Deputy Ministers.
- Ontario's representatives at provincial-federal tourism meetings have most often been Deputy Ministers.
- The OTMPC operated for more than six months without a permanent Chair (an appointment responsibility of Cabinet).
- Government decisions are routinely made without considering the impact on tourism (oversights as opposed to intentional indifference) such as the four cent (over four years) tax increase on aviation fuel contained in the 2014 provincial budget, where neither the Ministry nor the industry appear to have been consulted.

In order for tourism to be successful, tourism's role within the Ontario economy needs to be defined—including targets, tied to a defined strategy—as do the roles and responsibilities of the main players.

Tourism's Role in the Ontario Economy

In Ontario, as with most Canadian and many international jurisdictions, government plays a more significant role in tourism than in most other industry sectors. This results, in part, from ownership of tourism infrastructure (e.g. museums, parks, sports/recreation facilities), the creation and near 100% funding support of most RTOs as well as the pan-provincial tourism marketing organization (OTMPC), leadership of major event bids (e.g., Pan AM Games) and control over many policy and regulatory issues that affect tourism. However while centrally involved, government has not clearly established the role of tourism in the Ontario economy, for example:

- How is tourism used (or how should it be used) to support broader economic direction? While tourism was identified in *Building Together: Jobs and Prosperity for Ontarians* as an economic pillar, job creator and revenue generator, how does tourism relate to other Ontario industries?
- What role does the Ontario government intend to play in tourism? Using the key attributes of leadership discussed above, to what extent is government prepared to be visible, consistent, enabling and sustainable within a tourism context.
- Does government have an overarching plan (across ministries and throughout government) to further tourism growth in Ontario? How was (or should) the plan be developed and by whom? How should the plan be communicated?

A lack of definition can lead to uncertainty and mixed messages as well as potentially fostering a degree of instability.

Lack of Defined Targets and Monitoring Process

In 2009, the target of doubling tourism receipts in Ontario by 2020 was recognized as being "ambitious". By 2014 such a target is simply not achievable not only due to uncontrollable factors ranging from economic conditions (including exchange rate differentials), security and border concerns, emergence of competitive destinations (some as close as the United States) and strategic decisions by the national tourism marketer but also the lack of specifics (and measurements) comprising the targets.

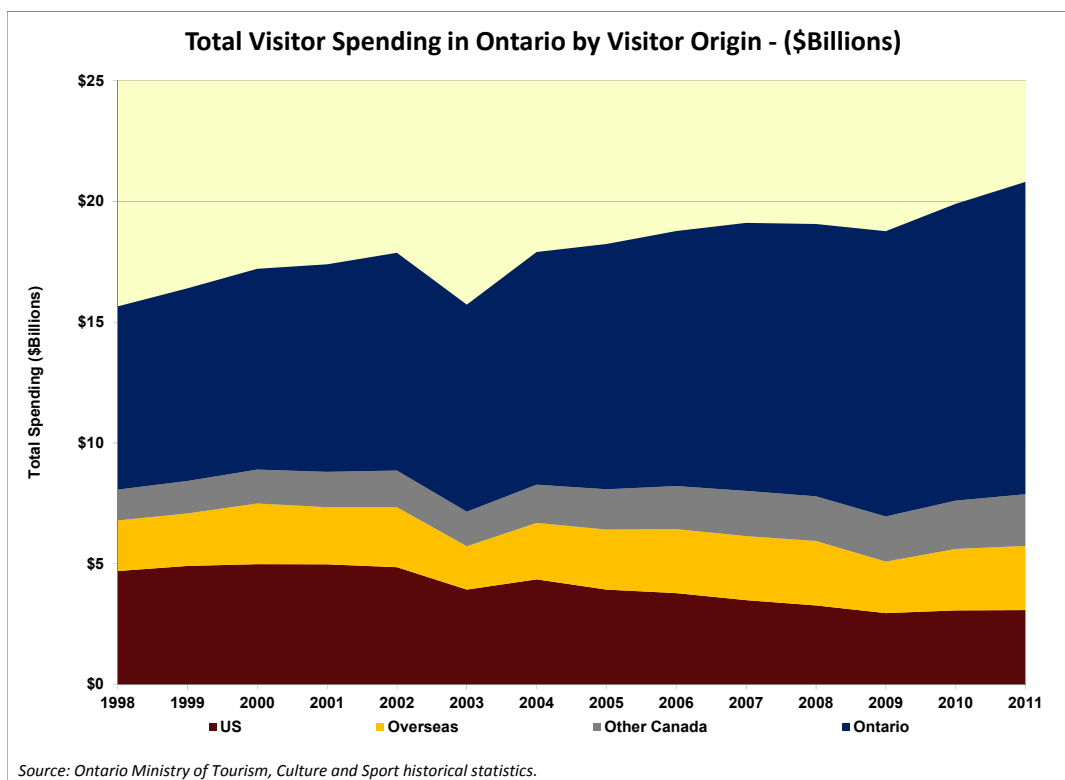
In those tourism jurisdictions where ambitious growth targets have been set and achieved, the target components are well communicated as are the associated measures.

| Country | Target | Measure |
|---------------|---|--|
| USA/Brand USA | To increase tourism receipts to \$250 billion and visitors to 100 million by 2021. | Continuation of funding tied to results and renewal of Travel Promotion Act. |
| Australia | Increase overnight tourism spend to \$140 billion (\$80.4 billion 2013) by 2020 | Continuation of funding tied to Tourism Australia Act and completion of deliverables contained within. |
| Ireland | To achieve EUR4.5 billion in revenue (EUR3.51 billion 2012) and 8.9 million visitors (7.3m 2012) by 2016. | Continuation of funding tied to annual government grants. |

| | | |
|------------------|---|---|
| Alberta | Grow tourism revenue to \$10.3 billion (\$7.8 billion 2012/13) by 2020. | Continuation of funding tied to allocation from Tourism Levy collected by hotels, lodges, and other accommodations in Alberta. |
| British Columbia | To grow tourism receipts to \$18 billion (\$13.5 billion 2012) by 2016/2017 | Continuation of funding contingent on approval of Destination BC's goals, objectives, performance measures, Service Plans and Service Plan reports. |

Source: HLT Advisory based on website and enabling documentation reviews.

Proper monitoring of targets requires a clear delineation of target composition. The Study set “doubling receipts” as a goal but didn’t specify, for example, the composition of visitation and spending from Ontarians traveling within Ontario versus visitors to Ontario. Further, the study used “tourism receipts” as a benchmark not “tourism spending”. “Receipts” includes monies paid to Canadian air carriers and travel agents for trips taken by Ontarians out of Ontario. Spending is a truer reflection of tourism activity within the province.



The domestic tourism market continues to grow, in aggregate as well as a proportion of total tourism spending. Domestic growth is welcomed, but the proportion of domestic spending to total spending is more a result of a decline in non-Ontario spending. As Canada’s most populous province, having the largest domestic tourism market in the country is expected. But from a competitiveness point-of-view, the intent of doubling

receipts presumes the focus is on bringing people to Ontario. The target of doubling receipts was never officially adopted by government.

Lack of Clarity Over Who Does What?

Confusion exists with respect to the roles and responsibilities of industry participants. Tourism is arguably better defined as a “system” as opposed to an industry given the myriad of participants and functions.

| Participants and Functions of the Tourism System | |
|---|---|
| Participants | Functions |
| <ul style="list-style-type: none"> • Tourism businesses • Ministry of Tourism, Culture and Sport (and other ministries) • Government agencies with direct support (e.g. OTMPC), product support (e.g., ROM, Science North), service support (e.g., OTEC) and infrastructure support (e.g. GO Transit) tourism interfaces • Other government ministries and departments (all levels) • Academia (e.g., hospitality programs at colleges) • Marketing/destination management organizations (RTOs, DMOs, OTMPC) • Chambers of Commerce • Advocacy organizations • Labour • Funding/granting agencies • Sector associations • Tourism Industry Association of Ontario | <ul style="list-style-type: none"> • Setting policy and regulation • Strategic planning • Establishing and monitoring targets, standards and benchmarks • Marketing • Operations • Communications • Workforce development • Research • Economic development (investment attraction) • Infrastructure needs (directly and indirectly affecting tourism) • Operations support for small- and medium-sized business |

A host of other businesses and government entities have various levels of activity in tourism.

What We Heard: Input from Consultation Sessions and Written Submissions

The leadership discussions at the consultation sessions, reinforced through written submissions, almost always identified one of two options for leadership of the Ontario tourism industry, either a:

- Top-down approach where:
 - The Premier, Cabinet and relevant Minister in charge of tourism play the key leadership roles, potentially augmented by senior (private-sector) industry representatives.

- Targets are set at the top together with performance measures.
- Functional entities either controlled by the Province (e.g., OTMPC) or that receive government funding (e.g., RTOs) are aligned with leadership targets and instructed “top-down” accordingly.
- Bottom-up approach where:
 - The industry at-large sets targets and goals through ongoing facilitation and input sessions.
 - A non-governmental entity that speaks for the industry (e.g., TIAO, a newly-created entity) coordinates input from individual operators, sector associations, regional and destination marketing organizations and then submits to government. Some concern was expressed that the creation of a new entity to undertake this task would delay the process and/or create confusion. The Premier, Cabinet and/or relevant minister in charge of tourism is positioned as an important “face” for tourism but more in a figurehead role.

Regardless of the approach, government (Premier, Cabinet, Minister and/or the bureaucracy) by virtue of its myriad roles and funding support across the industry has a, if not the, leadership role to play in tourism.

The industry also needs to take a leadership role. In fact, one of the recommendations in the 2009 Report was the establishment of a single tourism industry association. TIAO stepped up to take on that role and responsibility.

Success will come when government and industry work together to meet the goals of a shared plan. Jointly, industry and government need to support and facilitate a process designed to ensure alignment between:

- Provincially-funded marketing and tourism support entities including OTMPC and the RTOs.
- Provincial ministries with direct impact on tourism (Northern Development and Mines; Economic Development, Employment and Infrastructure; Transportation, etc.)

Going forward, working together, industry and government leadership can work to:

- Set and formally adopt a vision, targets and goals at a provincial level.
- Establish an annual reporting mechanism on the vision, targets and goals.
- Translate the vision, targets and goals to government agencies (notably OTMPC) and the RTOs (in order to align actions).
- Identify research needs (tied back to the targets and goals set out in provincial tourism strategy). This approach will also determine what trends, performance benchmarks and metrics need to be tracked, over what time period and how.
- Communicate within the industry. Lack of communication was repeatedly raised as a challenge and, interestingly, often from the very organizations expected to be facilitators of communication (e.g., RTOs). Ad hoc structures have been

created but mostly driven by individuals. Such structures are not sustainable or consistent over the long term.

Leadership by government needs to include a consistent whole-of-government approach to policy decisions that affect tourism (e.g., impact of airline fuel tax increases) and leadership by industry is needed to bind the private sector together.

Consultation session attendees raised several other issues without arriving at a consensus on either solutions or next steps:

- Position of tourism within government. Some view a stand-alone ministry of tourism as a preferred direction while others see linkages with business-oriented ministries (e.g., economic development) as more conducive to improving the standing of tourism. Similarly, some view the co-location of tourism with “operational” responsibilities such as culture and sport as both limiting and inward-focused (to Ontario residents as a service as opposed to visitors).
- Little optimism was evidenced about reaching the growth target for tourism receipts however the approach to revising the target was not established.
- Nature and type of key performance indicators needed to ensure growth.

Recommendations for Change

TIAO believes the following initiatives will support stronger, clearer and more effective leadership for Ontario’s tourism industry:

1. Communicate the Government of Ontario’s position that tourism is a key component of the provincial economy. Consistent with the emphasis on tourism set out in the *Building Together: Jobs and Prosperity for Ontarians* report, the Government of Ontario should:
 - Adopt a whole-of-government approach to tourism where key government decisions (e.g., transportation, taxation, regulation) are viewed through a tourism lens. Alignment of Ontario government and Ministry actions with the targets established in the strategic plan is a necessity.
 - Position the Premier and Minister of Tourism as the champions of tourism.
 - Align mandates of those entities with a direct (e.g. OTMPC, RTOs) and indirect (e.g., cultural, heritage, parks and recreation assets) impact on tourism with the five-year strategic plan including specific targets (see Recommendation #2).
 - Provide a multi-year outline of the Ontario government’s role (either directly or indirectly through agencies such as OTMPC) in supporting tourism, tied to the strategic plan.

The Government of Ontario should formally “sign off” on and accept the strategic plan once completed.

2. TIAO should lead the development of an overarching, rolling five-year strategic plan for Ontario tourism that will:
 - Contain five-year, as well as longer-term aspirational, targets for visitation including separate targets for intra-Ontario and inbound visitation to Ontario.
 - Identify key challenges and opportunities together with agreed upon strategies and responsibilities to address targets.
 - Identify the key entities involved in the development, operation, marketing and regulation of tourism in Ontario, clarify roles and responsibilities as well as establish accountability measures.
 - Be refreshed every year so that a five-year horizon (with renewed targets and metrics) is always in view.

The strategic plan should also identify the amount and source(s) of funds for key service delivery entities—specifically OTMPC, RTOs, DMOs and sector associations—for the entirety of the five-year plan (and successive one-year updates).

The ultimate responsibility for developing the strategic plan should rest with TIAO with the MTCS' full support and commitment to implement.

3. Create an Advisory Committee to monitor progress towards achieving strategic plan targets as well as to provide policy advice to Premier and Cabinet. The make-up of the Advisory Committee should be determined by TIAO—working in conjunction with the Premier and/or Minister—and shall include up to ten industry leaders who have significant investment in and/or unique insights into Ontario tourism. The existing network of advisory committees (e.g., OTMPC committees) should be drawn upon for input as necessary. The Advisory Committee should meet no less than twice per year and report annually on the status of the objectives and targets set out in the strategic plan.

B. INVESTMENT

Investing wisely is one of the four strategies identified in the Report and possibly the most challenging given the scope of need and constrained resources. "...with limited resources we can't do everything at once. To become internationally competitive, Ontario must focus on strategic tourism investments with maximum return. Infrastructure investment in transportation that helps travelers get from place to place is crucial to more enjoyable and longer visits. At the same time, we will need to be more helpful to private investors looking to grow their business in Ontario. Small and medium sized operators also need access to capital to help revitalize their product."

The need for public- and private-sector capital investment in tourism crossed several Study recommendations although transportation infrastructure investment was highlighted at almost every session.

Competitiveness Report Recommendation #10: Invest in Transportation Infrastructure

Invest in Transportation Infrastructure: Ontario should improve access to existing attractions focusing on the links that make it easier to get from one region to the next. Tourism transportation funding should focus on movement in and out of key gateways or high-draw areas.

Competitiveness Report Goals (Transportation):

- People will be able to get to and from Ontario's key destinations easily — particularly from the tourism gateways (Niagara, Toronto and Ottawa).
- A sophisticated transportation network will encourage visitors to stay longer and visit more parts of the province.
- Ontario will boast a network of high-quality, accessible, alternative (to auto) forms of transportation throughout the province (such as rail, ferries and bike trails).
- New transportation investments will consider the impact on tourists and the tourism industry.

The consultation process focused on transportation but also raised several of the other investment-oriented recommendations from the Report.

Related Competitiveness Report Recommendations:

- *Actively attract investment: The Ontario government should identify its high-potential destinations for investment. It should undertake a campaign to target investors, provide selective incentives and make it easier to work with governments. (#11)*
- *Help operators access capital: Ontario should help support loans and/or loan guarantees to small- and medium-sized tourism operators by working with existing lenders. (#12)*
- *Transform our attractions: Ontario should continue to invest in its own tourism and cultural attractions, provincial parks and trails to bring them up to leading global standards. (#13)*
- *Cultivate festivals and events: Ontario should strategically invest in major festivals and events with the highest potential for growth in terms of total tourist expenditures. This would help to raise the profile of Ontario and capitalize on the province's strong product offering and natural assets, culture and the arts, key economic clusters and sports infrastructure. (#15)*

Context and Implementation:

The Report's "invest wisely" strategy focused primarily on transportation and tourism product without further refining or differentiating the myriad components within this category. What comprises investment? At a minimum, the following should be considered as separate and distinct investment categories (with government involvement ranging from minimal to comprehensive):

- Transportation—including road, rail, airport and water/ferry services. Not all of these fall under provincial jurisdiction but all are essential to effectively and efficiently move visitors around the province.

- Public sector-owned/operated tourism product—including attractions servicing residents and visitors (e.g., Science North, Royal Ontario Museum, Art Gallery of Ontario, Ontario Place), convention infrastructure (e.g., Ottawa Convention Centre), parks and recreation (e.g. Algonquin Park, Niagara Parks Commission).
- Private sector-owned/operated product—a wide range of lodging, foodservice, attraction, transport, retail and related services. The owner/operators of these entities range substantially in size and sophistication as do their expectations of government financial support.
- Marketing and destination management functions—the OTMPC and RTOs along with special-purpose incentive programs (e.g. convention development fund, TEMPP, Celebrate) ideally funded in a manner that aligns with objectives contained in a provincial tourism strategy.
- Other tourism infrastructure (direct and indirect)—ranging from travel information centres/website to public transit.

Transportation was a key focus of the Study. Since completion of the Report:

- The Toronto Pearson Airport-Union Station rail link has been approved, but rail service has been lost between Toronto and the Niagara region and reduced to Southwestern Ontario (London, Windsor Sarnia) and to northern Ontario.
- Ontario played an active role in the provincial/territorial minister's request to the federal government for a review of competitiveness in the airline industry, yet the 2014 budget increased airline fuel tax without industry consultation.
- The 400-series highway service centres are now operational (although it was noted that the on-site tourism collateral material does not match the regions/products defined by the RTO structure).

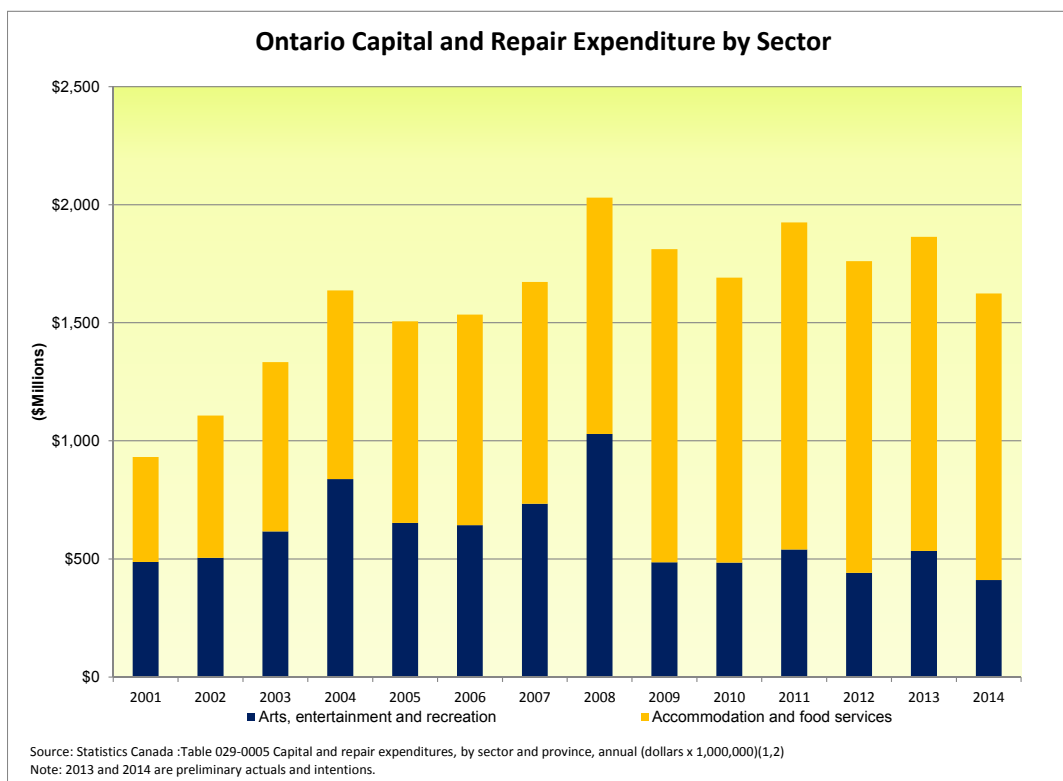
The non-transportation investment recommendations can be interpreted as focusing on three broad investment types:

- Self-sufficient, private-sector investment—recommendation #11 speaks to attracting investment to high-potential destinations. The Tourism Investment Attraction Strategy links MTCS with the Ministry of Economic Development, Employment and Infrastructure by identifying tourism as a priority sector in Ontario's investment attraction approach. However, while investments made via this program may attract incentives and related benefits, fundamentally this program speaks to self-sufficiency of the business involved. As a result, only a few areas of the province (notably large population centres such as greater Toronto, Ottawa and Niagara Falls) are likely to benefit as the resident population provides an equal, if not greater, consumer base for business operations (e.g., major attractions such as Canada's Wonderland and Ripley's Aquarium have equally strong appeal to residents as visitors).
- Support for small- and medium-sized tourism businesses—recommendation #12 addresses the challenges these businesses face in accessing capital from traditional sources, not only given size but also ingrained biases about tourism industry challenges (e.g., seasonality, sophistication of operator). Aside from dedicated funding/grating programs (Northern Ontario Heritage Fund and Eastern Ontario

Economic Development Fund) little headway has been made on this recommendation, especially in connection with existing lenders.

- Provincial-government owned attractions—recommendation #13 addresses the broad spectrum of convention, park/recreation, interpretive centre and arts/culture assets owned by the Province. Investments have been made in various attractions but the selection of attraction and amount of investment seems somewhat ad hoc. At a minimum, the investment decisions have not been tied to any sort of provincial strategy (e.g., how does development of the Discovery Centres at Fort Henry and Upper Canada Village relate to provincial visitor targets).

Statistics Canada produces annual summaries of capital investment in various industry sectors, using the North American Industrial Classification System (NAICS). The “arts, entertainment and recreation” and “accommodation and food services” sectors are used as a proxy for tourism. Capital and repair investment in Ontario in these two sectors has increased (or is forecasted to increase) from \$932 million in 2001 to \$1.624 billion in 2014. In only one year since the completion of the Study has the total capital investment surpassed the 2009 level¹.



A final area of focus is events (including leisure/entertainment/cultural events as well as business events). Celebrate Ontario (\$20 million in 2013/2014) and the Convention Development Fund (\$3.75 million to five cities between 2010 and 2013) are the two leading programs used to support event development and attraction. However, similar to the investments made at provincial attractions, these funds (more so Celebrate Ontario

¹Source: Statistics Canada. Table 029-0005 - Capital and repair expenditures, by sector and province, annual (dollars). Note: 2013 Statistics Canada data is preliminary actuals and intentions.

than the Convention Development Fund) have been awarded without any tie-back to a provincial strategy or targets. For example, are Celebrate Ontario funds used to support events that drive visitation to Ontario or to support local celebrations? Can a more formal approach to the planning and conduct of economic impact analyses of non-gated events be developed to ensure a degree of rigour and methodological comparability?

What we heard: Input from Consultation Sessions and Written Submissions The consultation sessions as well as the contents of the written submissions display an expectation of government investment that almost certainly surpasses both the financial capacity and willingness. Further, not only are transportation, product and marketing investments expected for proven tourism areas but some believe investments are warranted to create tourism product where none currently exists.

Most sessions raised the prospect of dedicated taxation for tourism investment either through a fixed percentage applied to commercial accommodation or via a fixed portion of the existing HST. Using only lodging revenue as the basis for such a formula is controversial, as it singles out one visitor expenditure (and an expenditure not always made on every trip such as a Visiting Friends and Relatives (“VFR”) trip). Therefore no consensus exists on the approach to raise funds, but that all dollars raised would be used solely for tourism marketing and investment. Such an approach would not only provide a consistent revenue stream but also create an incentive to increase visitation and visitor spending.

Transportation infrastructure continues to be a major focus area within the tourism industry at all levels and in every region. Toronto Pearson International Airport, and to a lesser extent the Ottawa and northern Ontario airports, are key fly-in gateways to the province. Connectivity with these airports (primarily via rail and road), enabling visitors to experience more of Ontario, was the main transportation need expressed. In addition, cycling, snowmobiling and hiking infrastructure were identified as needs.

With respect to public-sector involvement in new and/or upgraded privately-owned tourism product, suggestions included various combinations of:

- making active investments (loans not grants) possibly through a funding pool accessed based on project merit;
- setting up a pool of funds available to update/renovate existing product;
- rewarding investment through tax concessions (e.g., tax reductions or rebates tied to a pre-defined level of investment), loan guarantees and related incentives; and/or
- focusing on attracting new tourism investment only (emphasis on prospecting, enticing and supporting investors through an economic development role).

The absence of a comprehensive tourism strategy (with detailed targets) will pose challenges when making these investment decisions. A comprehensive strategy would provide guidance as to nature, location and desired results of such decisions. In the current situation, in the absence of specific targets, all options are valid. And all are chasing limited resources.

The Ontario government was encouraged to address investment needs in its own attractions, parks, recreation and related amenities. An alternative would see government considering permitting greater private sector involvement in upgrading, enhancing, repositioning and/or improving these assets provided the original purpose remains unchanged.

A range of creative and innovative investment approaches (generally on a smaller scale were discussed) including:

- Micro financing along the line of the “Vision in Steering Intelligent Tourism” program sponsored by Atlantic Canada Opportunities Agency. Smaller businesses and/or start-ups are sponsored and supported until maturity.
- Creation of tourism-focused incubators (a tourism version of Waterloo’s Communitech incubator).

General comments within the investment area include:

- Government red tape (regulatory, approvals, processing) hampers business investment and increases compliance costs whether a new business or expansion of existing businesses. Effort needs to be placed on facilitating not hampering investments.
- Government’s efforts to attract investment should look within Ontario and Canada as well as internationally.
- The process associated with grant and loan programs (e.g., forms, waiting periods) are too complex and not geared to the small- and medium-sized businesses they are intended to support. Further, qualifications and post-funding requirements are too onerous (e.g., requirement to operate 12 months/year to be eligible for a grant when the attraction is located in a seasonal tourist location).
- Provincial regulations (including new and reinterpreted TSSA and environmental regulations) are creating cost compliance issues for small resort and service operators. In many cases these regulations are believed intended for larger operations but are being applied to smaller operators with significantly negative financial implications (as well as limiting expansion potential).
- Consumer research (trip motivation, product preferences, and consumer trends) is not disseminated in a manner usable by the range of small- and medium-sized operators comprising the majority of Ontario’s tourism industry.
- Some concerns exist over how product can be diversified (e.g., replacing the economy surrounding the annual bear hunt with some less invasive activity).
- Government’s investment in tourism needs to relate directly to the tax revenue taken out of the industry.
- The investment community’s negative biases towards small- and medium-sized business as well as reluctance to invest in northern/more remote areas are problematic for both start-ups and business expansions.

One significant area that lacked consensus was the process to “choose winners.” In other words, how should government resources (including investment, product support, and

marketing) be directed on a project-by-project basis? If only so many marketing dollars exist should a handful of high-value products be highlighted (e.g., in national/international marketing campaigns to build visitation to Ontario) or should a much larger number be supported (albeit with a lesser scope)? Similarly, should “big win” investment and capital projects be sought or should smaller projects be identified with greater provincial coverage?

These decisions need to be informed through a comprehensive, province-wide tourism strategy.

Recommendations for Change

TIAO acknowledges that the desire for investment in transportation, tourism product, marketing initiatives and related tourism development initiatives far exceeds the availability of resources (public and private sector). However, TIAO believes the following recommendations are best suited to gain maximum value from existing means.

4. Ensure input into provincial transportation investment decisions that reflects the highest-value, highest-yielding tourism opportunities within both an urban and rural context. Not only should these investment decisions be made on the basis of enabling visitors to Ontario to move about the province—via road, including cycling, rail, air and water—but the transportation needs of tourism industry employees and employers should also be taken into account.
5. Explore opportunities to involve the financial community in funding new construction as well as expansions and upgrades to existing tourism infrastructure. The intent is to ensure business cases are reviewed with the rigour expected of a commercial lender but to explore opportunities for government to alleviate overarching tourism industry financing concerns (e.g., northern Ontario locations, seasonality).
6. Recognize that government has a role in facilitating significant tourism investment. As with other industries where significant capital investments are contemplated (e.g., auto manufacturing), governments should work to clear red tape, streamline approval processes and bring ministries (and municipalities) together to ensure investments are realized.
7. Redefine the objectives of existing (and any new) loan, grant and financial support programs to ensure alignment with the strategic plan. In particular:
 - Tying access to funds to one or more targets contained in the strategic plan as well as a test of the reasonableness of such targets (e.g., an amount provided to support a festival designed to achieve an X% increase in visitors from a targeted geographic market).
 - Clarifying the nature of the assistance (e.g., one-time to initiate/incubate an initiative versus ongoing support) and consistently applying the rules.
 - Eliminating any perceived politicization of these programs by reviewing metrics to determine if the target or objective was met.

8. Encourage the Ministry of Tourism, Culture and Sport to either reinvest in its own tourism assets or look for ways to involve third parties to better meet visitor demands.
9. Obtain a commitment from the Government of Ontario for continued annual funding of in-market activities including marketing, organization, product development and support. This funding commitment should be tied to the Jobs and Prosperity plan, consistent with tourism being identified as a leading export market opportunity. Reallocations may be required within the overall funding envelope as a result of introduction of the strategic plan. The overarching message is that Government of Ontario funding to support the strategic plan—whether direct or indirect via new funding mechanisms—needs to be clear, long-term, predictable and tied to success.

C. MARKET STRATEGICALLY

The Report noted that “For Ontario to be competitive, it needs to strategically pursue markets with the highest potential for growth while nurturing its current base. Although the global tourism market is growing, Ontario is competing with more destinations than ever before.”

The allocation of marketing dollars (e.g., towards geography, by channel/media type, seasonality, product/experience) is inevitably the most contentious and controversial responsibility for any destination manager. Rarely is there enough budget to accomplish everything deemed necessary. The Report focused primarily on defining the geographic markets that were believed to hold the greatest potential at the time and into the future.

Competitiveness Report Recommendation #17: Market Strategically

Ontario should market its destinations and experiences by focusing on our strongest existing international markets; prioritizing new and best prospect markets like Mexico, Brazil, India China; strengthening our appeal to French-speaking markets, especially Quebec; expanding our reach to new Canadians and their families; and continuing to focus on the strong Ontario domestic market.

Competitiveness Report Goals:

- Total tourist receipts will grow over the next decade.
- Visits from both traditional and best-prospect markets will increase.

Context and Implementation:

In the “next steps” of the Report’s Market Strategically section, several target markets were identified in order to focus investments on markets with the highest potential for growth, including the:

- United Kingdom (identified as Ontario’s largest overseas international source of tourism revenue for at least the next five to 10 years;
- emerging markets of Mexico and China (expected to overtake some of Ontario’s traditional international markets) as well monitoring markets such as Brazil and India;

- United States (i.e., repeat visitors from traditional markets such as Michigan, Northern Ohio and Western New York as well as high potential markets such as New York City and Chicago)
- mature francophone market in Quebec; and the
- domestic Ontario market (which was noted to be vital for the health of the Ontario tourism industry).

Since 2008, Ontario has experienced marginal growth from most emerging markets (with the exception of China) while U.S. visitation has fallen sharply (a continued trend line since 2001). Most of the U.S. decrease has come from same day visitors (i.e., decline of 1.2 million same day visitors versus a decline of 300,000 overnight visitors). Since 2009 combined U.S. same day and overnight visitation is largely unchanged.

| Visits to/within Ontario (000s) | | | | | | | % Change (08-13) |
|--|---------|---------|---------|---------|---------|---------|---------------------|
| 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | | |
| Core/Target Markets Identified in Report | | | | | | | |
| UK | 372 | 317 | 312 | 326 | 314 | 288 | -22.4% |
| India | 77 | 75 | 89 | 123 | 110 | 78 | 0.7% |
| China | 76 | 80 | 96 | 124 | 162 | 145 | 90.9% |
| Mexico | 115 | 69 | 41 | 46 | 52 | 51 | -55.2% |
| Brazil | 54 | 43 | 60 | 76 | 84 | 66 | 23.7% |
| Subtotal International | 694 | 583 | 598 | 695 | 721 | 629 | -9.3% |
| Unites States | | | | | | | |
| US - Overnight | 6,190 | 5,754 | 5,612 | 5,603 | 5,883 | n.a | n.a |
| US - Same Day | 6,974 | 5,823 | 5,519 | 5,873 | 5,808 | n.a | n.a |
| Subtotal US | 13,165 | 11,577 | 11,131 | 11,476 | 11,691 | 11,186 | -15.0% |
| Within Ontario | | | | | | | |
| ON - Overnight | 34,067 | 35,811 | 35,792 | 36,853 | 37,895 | n.a | n.a |
| ON - Same Day | 74,884 | 78,104 | 80,552 | 81,408 | 83,596 | n.a | n.a |
| Subtotal Ontario | 108,951 | 113,915 | 116,343 | 118,261 | 121,490 | n.a | n.a |
| Total to/within Ontario from all Sources | | | | | | | |
| Overnight | 46,220 | 47,289 | 47,297 | 48,883 | 49,751 | n.a | n.a |
| Same Day | 84,538 | 86,697 | 88,995 | 90,079 | 91,929 | n.a | n.a |
| Total Visits to/within Ontario | 130,758 | 133,986 | 136,292 | 138,962 | 141,680 | 142,000 | 8.6% |
| Source: Ontario Ministry of Tourism Culture and Sport historical statistics and OTMPC. | | | | | | | |
| *Total Visits includes other international visits and visits from other Canada. | | | | | | | |
| *n.a. = data not yet available. | | | | | | | |

OTMPC's mandate includes the following principles for the five-year period commencing in 2011:

- OTMPC is to lead the marketing of Ontario as a travel destination nationally and internationally;
- OTMPC and regional organizations are to work together to market travel within Ontario;
- OTMPC is to deliver marketing services that contribute to regional and economic development;

- OTMPC is to become a centre of excellence supporting provincial marketing; and
- OTMPC is to engage in partnerships to support the above objectives.

However, the lack of linkage to specific targets leaves far too much flexibility (and potential lack of continuity) to be meaningful.

OTMPC allocates up to one-third of its budget to marketing Ontario to Ontarians. A significant portion of the RTO combined budget is also allocated to marketing efforts within Ontario.

| Ontario Tourism Marketing Partnership Corporation: Marketing Budget Allocation by and Activity (\$000's) | | | | | | | | |
|---|---------|-----------|-------|--------|-------|----------|--------|--------|
| -----Direct Marketing Spend----- | | | | | | | | |
| | Ontario | Other Cda | U.S. | Int'l. | Other | Research | Admin | Total |
| 2012/13 | 10,112 | 1,272 | 6,744 | 5,793 | 9,405 | 2,444 | 10,767 | 46,537 |
| 2013/14 | 12,335 | 922 | 5,702 | 6,717 | 8,306 | 667 | 10,509 | 45,158 |
| 2014/15 | 7,418 | 416 | 8,608 | 6,515 | 9,030 | 800 | 10,680 | 43,467 |

Source: Ontario Tourism Marketing Partnership
Note: Other includes Ontario Tourism Information Centres (\$2.35 million in 2014/15, TCIS redevelopment project (\$4.2 million in 2014/15 and grants such as Celebrate (\$2.48 million in 2014/15.

What we heard: Input from Consultation Sessions and Written Submissions

Whether through written submissions or verbally at each of the sixteen consultation sessions the subject of marketing generated some of the strongest and potentially most irreconcilable opinions. The most fundamental difference of opinion is the degree to which the Ministry should be focused on growing domestic intra-Ontario travel as opposed to generating visits to Ontario. Some stakeholders believe the Ontario market should be the primary focus (notably those relying on major Ontario urban centres such as Toronto and Ottawa as primary origin markets) while others (typically the major urban centres) are focused farther afield. The key questions in this regard are:

- Should the Ontario government fund in-province marketing?
- If yes, who should be charged to undertake in-province marketing (OTMPC and/or RTOs) and how should potential overlapping marketing efforts be addressed (to reduce duplication)?
- Are such in-province marketing efforts designed to capture (or create) additional visits or affect a form of "import substitution" (e.g., enticing Ontarians to stay in province rather than travelling outside)? If the latter, a number of product readiness questions prevail.

For those stakeholders looking outside Ontario to generate visitation, a universal belief exists (across most if not all stakeholder sessions and written submissions) that:

- Ontario needs to focus on the largest and closest potential market: the United States.
- Marketing efforts directed to emerging markets are important but not if budget comes at the expense of U.S. marketing efforts.

- The OTMPC, RTOs and DMOs, as appropriate, need to synchronize efforts in sales and marketing including brand awareness, luring, selling and closing.
- Marketing funds should be determined via a formula linked to HST that would permit both continuity of funding (year-over-year and ability to plan well into the future) and a basis for sharing in success (as visitor spending increases so do the tourism marketing funds).

Other differences of opinion included:

- The value of the "Ontario" brand in external marketing. Some believe "Ontario" or "Yours to Discover" should lead in all cases. Others believe that opportunities exist for destinations (arguably with equal or greater awareness than "Ontario") such as Toronto or Niagara to be the focus. A third option is to lead with product (e.g., wine country, fishing, snowmobiling, urban nightlife) in a situation-specific focus.
- Responsibility for leading the charge into non-Ontario markets. Those RTOs with independent brand awareness—such as Niagara, Toronto and Ottawa—are more likely to see themselves in the lead role, supported by OTMPC. Smaller RTOs are looking for the OTMPC to lead.
- What organization "lures" (raises awareness and interest) versus closes the sale? The roles of OTMPC, RTOs and DMOs need to be clarified.
- Funding of special events and festivals (e.g., TEMP, Celebrate). Some see these funds as catalysts to initiate events/festivals with funding support gradually withdrawn as the event/festival matures while others believe the event/festival's success warrants ongoing financial support ad infinitum.

Other marketing comments raised numerous times included:

- A concern about too much duplication in travel publications—guide books, maps, events—some of which are supported by government through OTMPC and related programs.
- Creation of RTO brands (in some cases replacing better known tourism brands such as "Muskoka") has caused confusion and been an unproductive use of scarce funds.
- Lack of clarity over the mandate and operations practices of OTMPC, specifically:
 - not responsive to industry needs (communication issues);
 - lack of transparency in funding and other decisions;
 - partnership funding deadlines are driven by political not business/industry needs; and
 - the expression "partnerships for partnership's sake" was heard more than once.

At least part of the concern about OTMPC is caused by a lack of targets and clarity regarding in-Ontario versus external marketing efforts.

- Better, more timely, consistent data required to make marketing (and product) decisions. More regional data. More sector/product-specific data (RTO 13 has conducted its own research on hunting, motorcycle markets).
- Opportunity to target new Canadians (primarily located in major urban centres) and move them about the province to experience wider sense of "Ontario"
- Market "awesome" not "cheap".
- The day trip market is vital for a great many Ontario destinations whether accommodating U.S. and international visitors (e.g. Niagara Falls) or major Ontario urban centres (e.g., St. Jacobs).

A final comment tied to both marketing and the regional structure deals with numerous situations where regions are competing with each other (using provincial government resources) to attract the same (often Ontario-based) visitor.

Recommendations for Change

TIAO acknowledges the importance of intra-Ontario tourism as well as recognizing the relative importance of visitor spending in smaller communities. Further, TIAO acknowledges that despite a small impact on province-wide spending, tourism spending in smaller communities contributes a significant proportion of local economic activity. However, in order to maximize visitor spending potential within the province, TIAO believes a greater emphasis is required on attracting visitors to Ontario.

The strategic plan should acknowledge the importance of intra-Ontario travel in sustaining Ontario's tourism industry while focusing on visitors to Ontario as the primary means to achieve meaningful incremental growth.

10. Allocate marketing resources based on the targets set out in the strategic plan. Ensure appropriate metrics and benchmarks are in place to gauge effectiveness of marketing spend.
11. Focus OTMPC's efforts solely on bringing visitors to Ontario. OTMPC's in-province marketing efforts should be reduced to maintaining the common brand platform as well as marketing activities focused on export substitution opportunities (e.g., where an Ontarian could be expected to forego a trip outside the province for a product/experience within Ontario). Current OTMPC funding programs (e.g. TIPP program) should be re-evaluated and, if deemed valuable but no longer fit the changed OTMPC mandate, reassigned to MTCS.
12. Refocus international marketing efforts on the United States, Ontario's closest, deepest and strongest potential market.
13. Lead marketing efforts outside Ontario with the best-known most saleable destination, brand, product and/or experience. In some situations, this may involve using a destination brand (e.g., Niagara) together with the "Canada brand" but not the Ontario brand. The branding selection(s) made should be based on the greatest potential impact with the consumer.

14. Contain in-province marketing to those activities undertaken by the RTOs, DMOs and sector associations. Financial resources deployed to in-province marketing will either be obtained through funds allocated to the RTOs by the Province (or other funding mechanisms) or raised through actions of the RTOs, DMOs and/or sector associations.
15. Consolidate the research functions currently imbedded in each of the Ministry and OTMPC into a single unit. The goal should be an agreement on research needs including recurring (e.g., ongoing tracking and monitoring, benchmarking) and special research projects (e.g., consumer- focused, product-focused) together with associated timeframes. Research produced for Ontario should link to national research sources and outputs such as the Conference Board of Canada (or describe variances as relevant).

Research intelligence should be used to guide the five-year strategic plan. In particular, the plan should ensure that the product development and market elements of the strategy are built on the same research.

Ultimately, the research produced should be more timely, have greater application (e.g., tied to RTO/DMO needs) and be better disseminated to the industry. A centralized research function is more efficient, eliminates overlap and is the best approach to align objectives. Research should be used to inform and update decisions around market focus, consumer trends, product needs and policy (e.g., gap analyses at the product and regional level). Given the technical focus of research needs and application, the Strategic Plan may include a separate research advisory committee.

D. PRODUCT/EXPERIENCE

The Study did not identify product as a strategy in and of itself, although Recommendation 18 ("Focus on our Unique Products") was included in the broader marketing (Reach Out) strategy. The lack of focus on product as a core strategy, and a recommendation (and underlying goals) directed largely to packaging versus new development, implies satisfaction with the existing product offering; this view is not necessarily shared with industry.

Competitiveness Report Recommendation #18: Focus On Our Unique Products

Ontario should focus on the unique product offerings of regions including natural experiences and our great water assets as well as niche tourism experiences such as sports, cultural, culinary, eco and agricultural tourism. (Recommendation 18)

Competitiveness Report Goals:

- Ontario will have a diverse and innovative range of products and experiences that appeal to a broader demographic group.
- The industry will be innovative and creative in its response to niche opportunities and product development.

Context and Implementation:

A product/experience is an element that fulfills a need for a visitor in the form of, among other things, a physical attraction, infrastructure and/or a cultural benefit. A product/experience has an element of uniqueness or differentiation that attracts the interest of a visitor to a particular area. Successful products/experiences are accessible to a wide range of visitors from a transportation perspective, and shall have a certain scale to the offering in terms of availability to an appropriate volume of visitors.

The development and promotion of tourism product should be an outgrowth of consumer trends research, successful examples from other locations, and through the tracking of comments & reviews of prior users of the specific product/experience. Defining a marketable tourism product/experience is difficult as the relevancy and value attributed to such an offering lies in the 'eye of the beholder'. The product attracting a certain visitor to a region may vary widely in a potential travel consumer.

Some 30 experiences within Ontario have been identified as 'Signature Experiences' by the Canadian Tourism Commission. These experiences, ranging from the 'Extreme Canadian Icewine Experience' at the Inniskillin Winery in Niagara to the 'WildExodus Adventures Fur Trader's Life' in Fort William Historical Park, are an intent to define the vast opportunities available to a visitor to Ontario. OTMPC has recently initiated Ontario Signature Experiences (OSE) to expand the list of the province's tourism experiences deemed to be market-ready for tourists from around the globe.

Recognizing that the identification of the unique experiences by the CTC serves as a starting point for Ontario; there exists the need for a process that objectively rates and legitimizes the product experiences as the best that Ontario has to offer a visitor. Equally as important is the need to determine whether the province's product/experiences stand up to the scrutiny of a targeted visitor from the USA or an international source market. The focus on quality of the marketable experiences is paramount to achieving the kind of success required to gain interest from a potential global traveller who, in most cases, is contemplating Ontario for the first time.

What we heard: Input from Consultation Sessions and Written Submissions

The product priority area produced wide-ranging views at the consultation sessions and through written submissions, in part reflecting the diversity of Ontario tourism product and visitor base. Generally, consensus exists on the following:

- Some regions will have more export-ready product than others, while some have almost none.
- Some products are better-known locally (Niagara region wine and culinary) but need marketing/packaging assistance further afield (marketing Niagara wine/culinary to Chicago).
- Niche products identified in the Competitiveness Study (e.g., culinary) are now mainstream tourism products.
- The regions (RTOs, DMOs and operators) are best able to define core base of product (e.g., RTO 13 hunting/fishing/snowmobiling) from their region.
- More insights into consumer trends/needs is required. Research should be completed on both a provincial and regional level with an emphasis on timely communication and distribution of the results.

The lack of consensus tends to centre on government's role with respect to the product landscape:

- How (or if) to develop protocol to select "winners" (export-ready or "signature" experiences)?
- Should marketing activities outside Ontario focus on those few regions with significant export-ready product? Some believe that playing to Ontario's strengths by highlighting these products will entice visitors to Ontario...then opening up an opportunity for more active exploring across the Province.
- Should government be building/investing in tourism product—or encouraging others to build/invest—where none exists or is limited?
- Recognizing the overlap with the Investment section, in an environment of limited funds:
 - How can government best be involved in product/experience development?
 - Should government be building/supporting attractions in regions without broader tourism appeal?
 - How should government support and grow its own assets: museums, parks, broader infrastructure (transportation)...and eliminate political overlay in how these assets are managed?
- How can (or should) government help existing operators improve tourism product through either guidance/training or in some cases, financial support (loans not gifts)?
- How should product competition between RTOs (e.g., culinary) be eliminated?

Divergent views were also evident with respect to developing product inventories. In some regions (notably those with less export-ready product) a view persists that detailed inventory of all tourism product (essentially, anything a visitor might touch, need or experience on a visit) should be collected, inventoried and made available through listings or other means. On the other hand, the Premier Ranked Tourism Destination Framework documents (completed via numerous DMOs and related organizations across the Province some years ago) have already achieved such listings. In addition, true export-ready product is known and will not require the support of such listings.

Recommendations for Change

The consultation sessions (and written submissions) displayed a disquieting and far-reaching expectation that provision of tourism product (and experiences) is largely a public-sector obligation. While the public sector (at all levels) controls considerable tourism assets, the public sector has neither the capability nor financial capacity to take on such an obligation (as discussed in the Investment section). As a result, product/experience-recommendations are focused on more practical, non-capital-intensive areas.

16. Create a process to identify product/experience winners. Such a process will seek input from each RTO to identify a limited number of products and/or experiences from within each region. Presumably these products/experiences are currently being used at the RTO level to build in-province visitation (and used in any external marketing activities already undertaken by the RTO/applicable DMO). Once each region identifies core products/experiences, the process will select a reasonable number of key "Ontario" products/experiences to be featured through the majority of marketing activities directed at potential in-bound visitors. Development of such a process assumes:
 - The selected key Ontario products/experiences will be constantly reviewed to ensure market relevance.
 - Additional products/experiences may be identified on a situation-by-situation basis but always within a predetermined framework designed to ensure ongoing improvement and market readiness of Ontario products/experience.
 - Significant events (e.g. Pan American Games) and physical assets (e.g., new stadia/arenas, entertainment venues) not necessarily designed to be tourism attractors may be considered when selecting key Ontario products/experiences. The corporate support of these events and assets can be particularly advantageous.
 - Not all regions will be represented by the selected products/ experiences; some regions may feature multiple products/experiences.

This process should occur in tandem with initiatives tied to the Ontario and Canada Signature Experiences program as well as ensure alignment with product/experience objectives set out in the strategic plan.

17. Continue the recently-enabled, ten-year strategy to stimulate private investment in new tourism product. This strategy, conducted in conjunction with the Ministry of Economic Development, Employment and Infrastructure, should be formalized through a process that permits industry input into defining challenges and new opportunities as well as the regular reporting on successes.
18. Demonstrate interest in significant tourism investments by providing similar outreach initiatives as offered to other industry sectors. The process to facilitate new/expanded manufacturing plants was noted as an example of how a whole-of-government approach can be focused on a significant investment. Such a focus is warranted for significant tourism investment.

TIAO recognizes the need for ongoing development, rejuvenation and packaging of product in order to maintain top-of-mind awareness as a visitor destination, particularly in the current highly competitive environment.

E. REGIONAL STRUCTURE

The Study identified a case for “the creation of well-defined and well-managed tourism regions across the province. Our research and consultations suggest that tourism regions and strengthened [RTOs] within each region would be the best way to realize the potential of tourism throughout the province. The regional model would bring together stakeholders within a region to oversee the development of new products, and to identify and define unique experiences offered by the region.”

The Study further states that “In Ontario, there are a great number of organizations and businesses involved in tourism, but not a great deal of coordination. There is a great focus at the regional level on marketing but there is not a coordinated approach to other key issues such as product and workforce development.”

Comments regarding the implementation and success of the regional structure were mixed. Nevertheless, the regional structure is one of the few Report recommendations implemented in its entirety.

Competitiveness Report Recommendation #2: Establish Regions

Ontario should establish tourism regions to better coordinate tourism marketing and management across the Province. Each region should work towards creating a unique brand and a stellar experience within a provincial brand. There should be one [Regional Tourism Organization (“RTO”)] for each region.

Competitiveness Report Goals:

- Regions will be defined more clearly and coherently to prospective tourists.
- All [RTOs] will be stronger and have a greater ability to provide regional leadership, set priorities and collaborate between regions.
- A single point of contact for management of tourism will be provided for both the industry and government at the regional level.
- A unique brand and experience will be created (within a provincial strategy) by each region, increasing its competitive advantage.

Context and Implementation:

The Study suggested the geographic boundaries of eleven RTOs together with suggested names. During 2009, MTCS set up a process for the tourism industry—including private-sector tourism businesses, tourism marketing and management entities, municipal/regional governments—to create an organization and associated governance structure for each of these tourism regions. MTCS embarked on a widespread consultation process to assist in setting up the RTO structure.

While the Study recommended a regional tourism marketing and management structure, no commitment of funds was initially provided to support such a structure. As a result, much of the MTCS' 2009 consultation process focused on a related recommendation: "the 'regularization' of destination marketing fees to help support expanded regional tourism marketing and management efforts." The concept of a destination marketing fee (a process then already in place within a number of destination marketing organizations) was replaced with the "regional tourism levy" (a similar concept but with greater definition required around implementation). In 2012, the MTCS announced that it would not move forward with the implementation of the Regional Tourism Levy, instead allowing for destinations to choose to implement a Destination Marketing Program on a voluntary basis.

The 2010 Ontario Budget contained a funding commitment for the regional structure. This investment allowed the RTOs to be established and work undertaken across a broad range of marketing, packaging and general support services. This work is ongoing and evolving as the RTOs have grown into their role. The general consensus during the consultation sessions reinforced the belief that "one-size" does not "fit all" with respect to Ontario's RTOs. As highlighted in the following table, the ebb and flow of visitors to each of the regions is as varied as the regions themselves.

| RTO | RTO Funding (\$000's) (2013/2014) | 2012 Visitor Spending by Geographic Source (\$millions) | | | | |
|--------------|---|---|----------------|----------------|----------------|-------------------|
| | | Ontario | Other Canada | USA | Overseas | Total Spending |
| 1 | 2,014 | 1,282.7 | 82.8 | 310.3 | 53.1 | 1,728.9 |
| 2 | 4,179 | 1,045.0 | 102.9 | 506.7 | 126.9 | 1,781.5 |
| 3 | 1,370 | 559.6 | 17.9 | 58.7 | 42.7 | 679.0 |
| 4 | 1,515 | 798.9 | 84.0 | 140.0 | 49.8 | 1,072.8 |
| 5 | 9,905 | 2,394.9 | 1,055.3 | 1,284.6 | 2,014.4 | 6,749.1 |
| 6 | 2,773 | 691.7 | 37.6 | 93.5 | 78.1 | 901.0 |
| 7 | 2,515 | 1,253.9 | 32.8 | 48.6 | 42.8 | 1,378.0 |
| 8 | 1,184 | 487.6 | 6.2 | 50.1 | 41.7 | 585.6 |
| 9 | 1,814 | 745.8 | 70.0 | 115.9 | 41.3 | 973.0 |
| 10 | 3,560 | 880.1 | 502.7 | 164.7 | 225.4 | 1,772.9 |
| 11 | 1,000 | 511.7 | 32.7 | 47.4 | 13.9 | 605.7 |
| 12 | 1,498 | 524.8 | 7.6 | 44.7 | 18.7 | 595.8 |
| 13 | 5,128 | 1,012.7 | 125.3 | 389.0 | 14.6 | 1,541.6 |
| Other | 1,545 | 1,619.5 | 104.5 | 83.9 | 148.2 | 1,956.0 |
| Total | 40,000 | 13,808.8 | 2,262.4 | 3,338.3 | 2,911.6 | 22,321.0 |

Source: OTMPC and the Ministry of Tourism, Culture and Sport

*Note: Tourism Spending shows 2012 data and RTO Funding Allocation is 2013/2014.

The regional structure remains a priority area until a formal ongoing funding commitment is put in place. In addition, some three years after implementation of the regional structure, some issues remain:

- A significant disparity in existing tourism product and market potential between RTOs. In other words, while some RTOs are primarily marketing entities others provide more basic support such as product packaging.
- Considerable differences in the size, scale and level of sophistication of private-sector businesses within each RTO and, as a result, a disparity in readiness of tourism product “for sale” outside of Ontario.
- Some RTOs are essentially comprised of the former DMO (e.g., Toronto and Ottawa) while others seek to integrate and cooperate (with varying levels of success) with several pre-existing DMOs within the region. .

In addition to these issues, RTOs have set individual mandates and strategies as no provincial framework was established to synchronize strategic and tactical decisions. The RTO Performance Measurement Strategy Framework is intended to standardize RTO performance but some concern remains about the appropriateness of the performance measures (e.g. “increasing the percentage of RTO aided brand awareness”).

What we heard: Input from Consultation Sessions and Written Submissions

Opinions varied on the merits of creating RTOs, the degree of success achieved and the desired future state. Whether a supporter or detractor however, a consensus formed during the sessions that the regional structure was a solution to neither a problem that had been previously identified nor one that the industry even realized existed. Despite this consensus, leadership and focus within the RTO structure were acknowledged as moving in the right direction.

Participants identified several areas where RTOs have had a positive impact on Ontario’s tourism industry and others where improvements are necessary.

The positive impacts from creating the RTO structure include:

- Bringing together the broader tourism industry within the RTO boundary.
- Enabling “business to business” actions and provision of a greater depth in consulting/advisory services across the region.
- Proving better geographic input into OTMPC marketing and operational decisions.
- Some RTOs are almost exclusively focused on attracting Ontarians to their region while others are more active in attracting visitors to Ontario – a good example of “one-size does not fit all”.

In addition, recently-implemented benchmarking metrics are expected to align RTOs with OTMPC and other government initiatives.

The issues and challenges included:

- The boundaries established for the RTOs:
 - Don’t always match those of regional government, making alignment more difficult.

- Conflict with other regions/tourism zones (such as those used in other Ontario tourism publications).
- Break natural product marketing boundaries (e.g., several waterways run through multiple RTOs such as the Rideau Canal).
- DMOs traditionally provide a vital role not only for marketing, but also a host of visitor service, convention/event servicing and support functions within the community. In many regions a vacuum was created when DMFs were discontinued and/or the municipal government stopped/reduced funding of DMOs when provincially-funded RTOs came on stream.
- The varying quantity and quality of tourism product within each RTO was not reflected in the structure or mandate. Most RTOs saw marketing as their key mandate whether or not the product was market ready (or if existing DMOs were already addressing marketing needs). In some regions product development, skills training or assistance with financing requirements may have been more useful focus areas.
- The “coordination of marketing, product development and public-private interaction” identified in the original recommendation was a little challenging to start, but efforts on all sides have resulted in some progress and have lead to more collaborative working relationships with the private sector, including DMOs and sector associations.
- The role of the RTOs was never defined beyond the initial recommendation nor were performance measures initially put in place, resulting in creation of brands, competitive marketing, and duplication of investment. However, recent evidence suggests an improvement on this front.

These issues vary in applicability and severity between RTOs.

Recommendations for Change

One of the essential ingredients to growing Ontario’s tourism industry is alignment among the key players. To this end, the development of the strategic plan needs to ensure alignment among and between the individual RTO plans as well as formal linkages to the overall strategic plan. Differences among the RTOs, the regions they represent and related players (e.g., DMOs, sector associations) should be acknowledged but ultimately harnessed for the greater good of Ontario tourism.

19. The roles and responsibilities of the RTOs need to align with the goals outlined in the five-year strategic plan. In addition, the roles and responsibilities of existing tourism entities such as DMOs and sector associations should be aligned with the RTO structure.
20. Government support of the regional structure should be tailored to the roles defined in the strategic plan and aligned with RTO responsibilities. MTCS needs to support each RTO in their defined role and responsibility.
21. Fund the RTOs in accordance with the functional responsibilities contained in the strategic plan.

22. Coordinate RTO functions and resources for the benefit of the entire Ontario tourism industry. Unless funded solely by sources generated from within the region (i.e., not through the Province), RTOs should be required to share:
- Marketing and consumer research (possibly through OTMPC)
 - Workforce development initiatives, training applications and labour market support (possibly through the Ontario Tourism Education Corporation)
 - Small- and medium-sized business support materials (possibly through relevant Ontario support programs provided to other industries)

4. Other Areas of Interest

Several other recommendations with the Report were raised by workshop participants and through the written submission. The following three areas were raised most often and consistently.

A. WORKFORCE DEVELOPMENT

The Report noted that "In Ontario, six universities and all 24 colleges deliver programs in tourism, hospitality or culinary sectors. A number of apprenticeship trades are also directly and indirectly related to tourism, hospitality and culinary arts. The Ontario government supports education and training through programs and initiatives...We need to better coordinate our education offerings, both between institutions and with the industry."

Competitiveness Report Recommendation #9: Develop the Tourism Workforce

Ontario should work to become an international leader in tourism training and education.

Competitiveness Report Goals:

- Achieve recognition of Ontario as an international leader in tourism education by 2020.
- Ontario is a world leader in attracting, training and retaining a high-quality tourism workforce.
- Industry, government and academic institutions collaborate to strengthen our tourism workforce.
- More people find long-term careers in the tourism industry, and the industry can easily find the talented staff it needs.
- Ontario competes globally with high-quality tourist destinations.
- Strong training and lifelong learning are part of Ontario's culture

The Report also addressed the need for standards, a requirement linked to workforce development.

Related Competitiveness Report Recommendation #8: Establish Service and Quality Standards

To encourage a service culture in Ontario, the industry should adopt a service quality strategy to meet tourists' expectations for high service standards.

Competitiveness Report Goals:

- High customer satisfaction will be demonstrated through increased customer loyalty and repeat visits to facilities.
- Consistently high standards will be adopted by the industry through a disciplined quality management approach.

The tourism sector has an increased international reputation as a quality contender through Ontario's recognized quality brand.

In 2012, employment in Ontario's tourism industry exceeded 330,000 with an additional 210,000+ employed in tourism-related industries. TIAO estimates that by 2030, labour shortages are likely to exceed 88,000 full-year jobs. Elimination of the Temporary Foreign Worker program is likely to exacerbate this problem.

The Ontario Tourism Education Council's original submission to the Study identified a requirement for the development of quality standards and service levels in the Ontario tourism and hospitality industry. OTEC also identified potential labour shortages as an issue suggesting that an enhanced focus on career awareness and initiatives would be required to develop the labour market for the sector.

The Ontario Tourism Workforce Development Strategy 2012-2017 is viewed as a strong basis for addressing workforce needs but withdrawal of Sector Council funding for the Canadian Tourism Human Resource Council will likely result in a reduction in resources to provide skills training at the same time as an increase in demand for such labour and skills. OTEC further notes that a recent three-year study of Canadian hotels in six provinces, designed to assess workforce skills, revealed that 40% of front-line tourism employees lacked the essential skill levels (i.e., literacy, numeracy, document use, communication) deemed necessary for their occupational code. Furthermore, the skill levels in Ontario's hotels were the lowest of any of those in the six provinces that participated.

In parallel, but with a more targeted focus, the TIAO-developed "Promoting Tourism As a Career" Campaign has been designed to identify tourism as a career option particularly among underserved and underemployed segments of the Ontario population. The targets for this program are First Nations, new Canadians and youth/students.

The TIAO initiative focuses on key training and job placement problems, notably:

- Quality of training (specifically the difficulty in implementing CTHRC national standards).
- Relationships with the industry (lack of contact between operators and academia)
- Career development concerns (matching skills upgrading with lifelong learning opportunities).

The TIAO initiative is a five-year, multi-faceted program designed to alleviate these problems.

Recommendations for Change

Both TIAO and OTEC have established roles to play in Ontario tourism. Both organizations should be supported in the development and delivery of initiatives to improve workforce capability and standards.

23. Support the "Promoting Tourism As a Career" Campaign. This program is positioned as a 50:50 joint venture between private and public sectors. The provincial government should be encouraged to fund the 50% public-sector share, either through MTCS or through another ministry (e.g., Ministry of Education, Ministry of Training, Colleges and Universities).
24. Incorporate a workforce development and standards focus within the Strategic Plan. A range of educational stakeholders should be consulted for input in the preparation of the workforce development and standards aspects of the plan.

B. MODERNIZE REGULATIONS

Most of the regulatory issues identified in the Report focused on “labour, way-finding, marketing, liquor and land access regulations. They also raised concerns about the inconsistency of application, insufficient clarity and the lack of flexibility for seasonal and small and medium-sized businesses.” The Report recommended that “to help address these issues, there should be more collaboration across government. Regulations should be modernized and government processes should be streamlined. Government should regularly review best practices, and consider the unique needs of the tourism industry.”

Competitiveness Report Recommendation #7: Modernize Regulations

To encourage economic development, the Ministry of Tourism should work with industry to identify, reduce or eliminate key impediments.

Competitiveness Report Goals:

- There will be a modernized regulatory environment for tourism businesses to compete, invest and grow.
- Impact on tourism businesses is considered when ministries amend or develop new legislation or regulation.
- Tourism businesses understand their obligations and regulations are enforced consistently.

Both government and industry need to put more focus on modernizing regulations—labour, way-finding, marketing, liquor and land access regulations—identified in the Sorbara Report.

Comments drawn from the consultation sessions focused on:

- Environmental and land use policies that either prevent renovation/expansion due to onerous requirements or mandate expensive upgrades in services for small operators (e.g., sewer) that seem better suited for much larger operations.
- Onerous requirements in funding and grating programs.
- Minimum wage and previously proposed legislation to pool gratuities.

In July, the Ministry of Economic Development, Employment and Infrastructure set a target of “\$100 million in fewer headaches and hassles for businesses by 2016-17” through elimination or modification of rules and regulation. The pending legislation requires annual reporting on efforts made to eliminate unnecessary bureaucratic requirements.

Recommendations for Change

TIAO acknowledges a process has commenced to address the impact of outdated, mis-targeted or otherwise burdensome regulatory requirements. However, TIAO is concerned that the sheer number and variety of such requirements will impede progress. Therefore, TIAO wishes to ensure proper attention is devoted to regulatory burdens specific to the Ontario tourism industry by engaging the industry in this important work.

25. Ensure industry input to identify those bureaucratic and regulatory issues causing the greatest challenges and negative impacts on Ontario tourism. A starting point to identify such issues is the *Reducing Barriers to Tourism Business* research study that was prepared in consultation with the Study in 2009.

C. IMPROVE WAY-FINDING

The Report stated that "Participants at our public consultations were very clear about the challenges of way-finding in Ontario. Way-finding and directional signage is a common problem in many jurisdictions."

Competitiveness Report Recommendation #19: Improve Way-finding

To encourage economic development, the Ministry of Tourism should work with industry to identify, reduce or eliminate key impediments.

Competitiveness Report Goals:

- Visitors will easily find their way to a destination as well as feel welcome, safe and comfortable in unfamiliar surroundings.
- New visitors will be attracted to Ontario's tourist destinations.
- Visitors will be encouraged to do more while at their destination.
- Reduced barriers to travel in Ontario.

Way-finding remains a significant and emotional issue within the Ontario tourism industry. Way-finding issues seem more acute in rural areas than urban areas.

Comments received with respect to way-finding issues include:

- A general lack of clarity on the process, requirements and selection standards for signage.
- Inconsistency in application of the process, requirements and selection standards.
- Prohibitive costs.
- Lack of responsiveness of Tourism-Oriented Directional Signing ("TODS") program representatives.

MTCS is planning to share the results of the TODS program review with the industry during the fall of 2014. Several RTOs have looked at way-finding initiatives within their region. The result of these reviews should be pooled for the benefit of the provincial tourism industry and reviewed in conjunction with the TODS review underway.

Recommendations for Change

The results from a comprehensive review of TODS will be communicated shortly.

26. Monitor the outcome of the TODS review and respond accordingly.
27. Set a process in place that brings together those way-finding initiatives already undertaken by individual RTOs. RTOs should be encouraged to work together to propose province-wide way-finding solutions based on work already undertaken and a grassroots-level awareness of issues.

TIAO may share further recommendations when the review is complete.

5. Summary of Recommendations, Responsibility and Timelines

The following table summarizes TIAO's recommendations together with responsibility and target completion dates (by year and quarter, based on calendar—year ended December 31st—versus government year).

| Priority Area Recommendations | Responsibility | Completion |
|---|----------------|------------|
| Leadership | | |
| 1. Communicate the Government of Ontario's position that tourism is a key component of the provincial economy. | MTCS | Q4/2014 |
| 2. TIAO should lead the development of an overarching, rolling five-year strategic plan for Ontario tourism. | TIAO/MTCS | Q2/2015 |
| 3. Create an Advisory Committee to monitor progress towards achieving strategic plan targets as well as to provide policy advice to Premier and Cabinet. | TIAO | Q1/2015 |
| Investment | | |
| 4. Ensure input into provincial transportation investment decisions that reflects the highest-value, highest-yielding tourism opportunities within both an urban and rural context. | TIAO | Q1/2015 |
| 5. Explore opportunities to involve the financial community in funding new construction as well as expansions and upgrades to existing tourism infrastructure. | TIAO/MTCS | TBD |
| 6. Recognize that government has a role in facilitating significant tourism investment. | MTCS | Q1/2015 |
| 7. Redefine the objectives of existing (and any new) loan, grant, and financial support programs to ensure alignment with the strategic plan. | MTCS/OTMPC | TBD |
| 8. Encourage the Ministry of Tourism, Culture and Sport to either reinvest in its own tourism assets or look for ways to involve third parties to better meet visitor demands. | MTCS | TBD |

| | | |
|--|------------------------|----------|
| 9. Obtain a commitment from the Government of Ontario for continued annual funding of in-market activities including marketing, organization, product development and support. | MTCS | Q2/2015 |
| Market Strategically | | |
| 10. Allocate marketing resources based on the targets set out in the strategic plan. | MTCS | Q1/2015 |
| 11. Focus OTMPC's efforts solely on bringing visitors to Ontario. | OTMPC | Q2/2015 |
| 12. Refocus international marketing efforts on the United States. | OTMPC/selected RTOs | Q2/2015 |
| 13. Lead marketing efforts outside Ontario with the best-known, most saleable destination, brand, product and/or experience. | OTMPC | Q2/2015 |
| 14. Contain in-province marketing to those activities undertaken by the RTOs, DMOs and sector associations. | MTCS/RTOs | Q2/2015 |
| 15. Consolidate the research functions currently imbedded in each of the Ministry and OTMPC into a single unit. | MTCS | Q2/2015 |
| Product/Experience | | |
| 16. Create a process to identify product/experience winners. | TIAO/MTCS | Q3/2015 |
| 17. Continue the recently-enabled, ten-year strategy to stimulate private investment in new tourism product | MTCS/MEDEI | Ongoing |
| 18. Demonstrate interest in significant tourism investments by providing similar outreach initiatives as offered to other industry sectors. | MTCS/MEDEI | TBD/2015 |
| Regional Structure | | |
| 19. The roles and responsibilities of the RTOs need to align with the goals outlined in the five-year strategic plan. | TIAO/MTCS/ Industry | Q4/2014 |
| 20. Government support of the regional structure should be tailored to the roles defined in the strategic plan and aligned with RTO responsibilities. | Transition Committee | Q2/2015 |

| | | |
|---|--------------------------------------|---------|
| 21. Fund the RTOs in accordance with the functional responsibilities contained in the strategic plan. | MTCS | Q2/2015 |
| 22. Coordinate RTO functions and resources for the benefit of the entire Ontario tourism industry. | MTCS/RTOs, Sector Associations | Q3/2015 |

| Other Areas of Interest Recommendations | Responsibility | Completion |
|---|-----------------------|-------------------|
| Workforce Development | | |
| 23. Support the Ontario Tourism As a Career Campaign. | MTCS | Q3/2014 |
| 24. Incorporate a workforce development and standards focus within the Strategic Plan. | MTCS/TIAO | Q4/2014 |
| Modernize Regulations | | |
| 25. Ensure industry input to identify those bureaucratic and regulatory issues causing the greatest challenges and negative impacts on Ontario tourism. | TIAO | Ongoing |
| Improve Way-finding | | |
| 26. Monitor the outcome of the TODS review and respond accordingly. | MTCS/MTO/RTOs | Q4/2014 |
| 27. Set a process in place that brings together those way-finding initiatives already undertaken by individual RTOs. | RTOs | Q1/2015 |

GLOSSARY

A number of acronyms are used throughout this document, including:

| | |
|--------|--|
| CDF: | Convention Development Fund |
| CTC: | Canadian Tourism Commission |
| DMO: | Destination Marketing Organization |
| HLT: | HLT Advisory Inc. |
| MEDEI: | Ministry of Economic Development, Employment and Infrastructure |
| MTCS: | Ministry of Tourism, Culture and Sport |
| OTEC: | Ontario Tourism Education Council |
| OTMPC: | Ontario Tourism Marketing Partnership Corporation |
| RTO: | Regional Tourism Organization (referred to as Destination Management and Marketing Organizations [DMMOs] in the Study) |
| TEMP: | Tourism Event Marketing Program |
| TIAO: | Tourism Industry Association of Ontario |
| TIPP: | Tourism Industry Partners Program |
| TODS: | Tourism-Oriented Directional Signing |
| VFR: | Visiting Friends & Relatives |

APPENDIX A

CONSULTATION PROCESS DETAILS

APPENDIX A—WORK SCHEDULE: APRIL – SEPTEMBER 2014

| | |
|-------------|--|
| April | <ul style="list-style-type: none"> • Interview TIAO Board members • TIAO Board workshop to discuss priority areas • TIAO member workshop to discuss priority areas • Prepare backgrounder • Prepare website content • Prepare consultation session materials • Design communication strategy for consultation |
| May | <ul style="list-style-type: none"> • Background meetings with Ministry and OTMPC • Conduct initial 11 consultation sessions |
| June | <ul style="list-style-type: none"> • Conduct final 5 consultation sessions • Receive, log, respond to (as necessary) written submissions |
| July/August | <ul style="list-style-type: none"> • Meet with provincial government and agency representatives • Meet with OTMPC representatives • Meet with TIAO representatives to review initial draft report • Refine draft report • Plan Board workshop to review drafts |
| September | <ul style="list-style-type: none"> • Meet with TIAO Board • Follow-up research and report edits as necessary • Finalize draft report • Finalize presentation material for Ontario Tourism Summit |

APPENDIX B
TOURISM COMPETITIVENESS REPORT RECOMMENDATIONS

APPENDIX B— RECOMMENDATIONS FROM DISCOVERING ONTARIO: A REPORT ON THE FUTURE OF TOURISM

The 2009 recommendations are listed, verbatim, below.

I: Change how government and industry work together to develop tourism and foster economic growth.

1. **Set targets:** Ontario should set its sights on becoming one of the world's preferred destinations. It has the potential and all the necessary elements it needs to be a leading global destination. By 2020, Ontario will aim to increase the economic contribution of the sector by doubling tourism receipts.
2. **Establish regions:** Ontario should establish tourism regions to better coordinate tourism marketing and management across the province. Each region should work towards creating a unique brand and a stellar experience within a provincial brand. There should be one Destination Marketing and Management Organization for each region.
3. **Regularize destination marketing fees:** To help support expanded regional tourism marketing and management efforts, Ontario should standardize Destination Marketing Fees (a fee on the room portion of a guest bill) across the province.
4. **Encourage a single tourism industry association:** The tourism industry should establish one effective and adequately resourced umbrella association to represent the needs of the entire industry. It should reflect the diversity of the industry across the province.
5. **Open our doors:** Ontario should advocate for the federal government to improve access to international markets, reduce barriers for entry into the province and overall, make it easier for tourists to get here.

II: Set new standards for success to become more internationally competitive.

6. **Encourage leadership:** For Ontario's tourism industry to fulfill its potential as a destination, and as a contributor to the economy, it needs a highly visible and sustained commitment from the Premier and Cabinet.
7. **Modernize regulations:** To encourage economic development, the ministry should work with industry to identify, reduce or eliminate key impediments.
8. **Establish service and quality standards:** In order to encourage a service culture in Ontario, the industry should adopt a service quality strategy to meet tourists' expectations for high service standards.

9. **Develop the tourism workforce:** Ontario should work to become an international leader in tourism training and education.

III: Maximize the impact of private and public tourism investments on new and revitalized product across Ontario.

10. **Invest in transportation infrastructure:** Ontario should improve access to existing attractions focusing on the links that make it easier to get from one region to the next. Tourism transportation funding should focus on movement in and out of key gateways or high-draw areas.
11. **Actively attract investment:** The Ontario government should identify its high-potential destinations for investment. It should undertake a campaign to target investors, provide selective incentives and make it easier to work with governments.
12. **Help operators access capital:** Ontario should help support loans and/or loan guarantees to small- and medium-sized tourism operators by working with existing lenders.
13. **Transform our attractions:** Ontario should continue to invest in its own tourism and cultural attractions, provincial parks and trails to bring them up to leading global standards.
14. **Revitalize Ontario Place:** Ontario should revitalize Ontario Place as the flagship of a new era in Ontario tourism by opening it all year, developing a master plan that includes the surrounding area and investing in local infrastructure.
15. **Cultivate festivals and events:** Ontario should strategically invest in major festivals and events with the highest potential for growth in terms of total tourist expenditures. This would help to raise the profile of Ontario and capitalize on the province's strong product offering and natural assets, culture and the arts, key economic clusters and sports infrastructure.

IV: Welcome consumers before they arrive, when they get here and during their visit in Ontario.

16. **Redesign marketing role:** Recast Ontario's approach to tourism marketing so that one agency becomes the provincial marketing lead for promoting the provincial tourism brand in partnership with the new tourism regions.
17. **Market strategically:** Ontario should market its destinations and experiences by focusing on our strongest existing international markets; prioritizing new and best-prospect markets like Mexico, Brazil, India and China; strengthening our appeal to French-speaking markets, especially Quebec; expanding our reach to

new Canadians and their families; and continuing to focus on the strong domestic Ontario market.

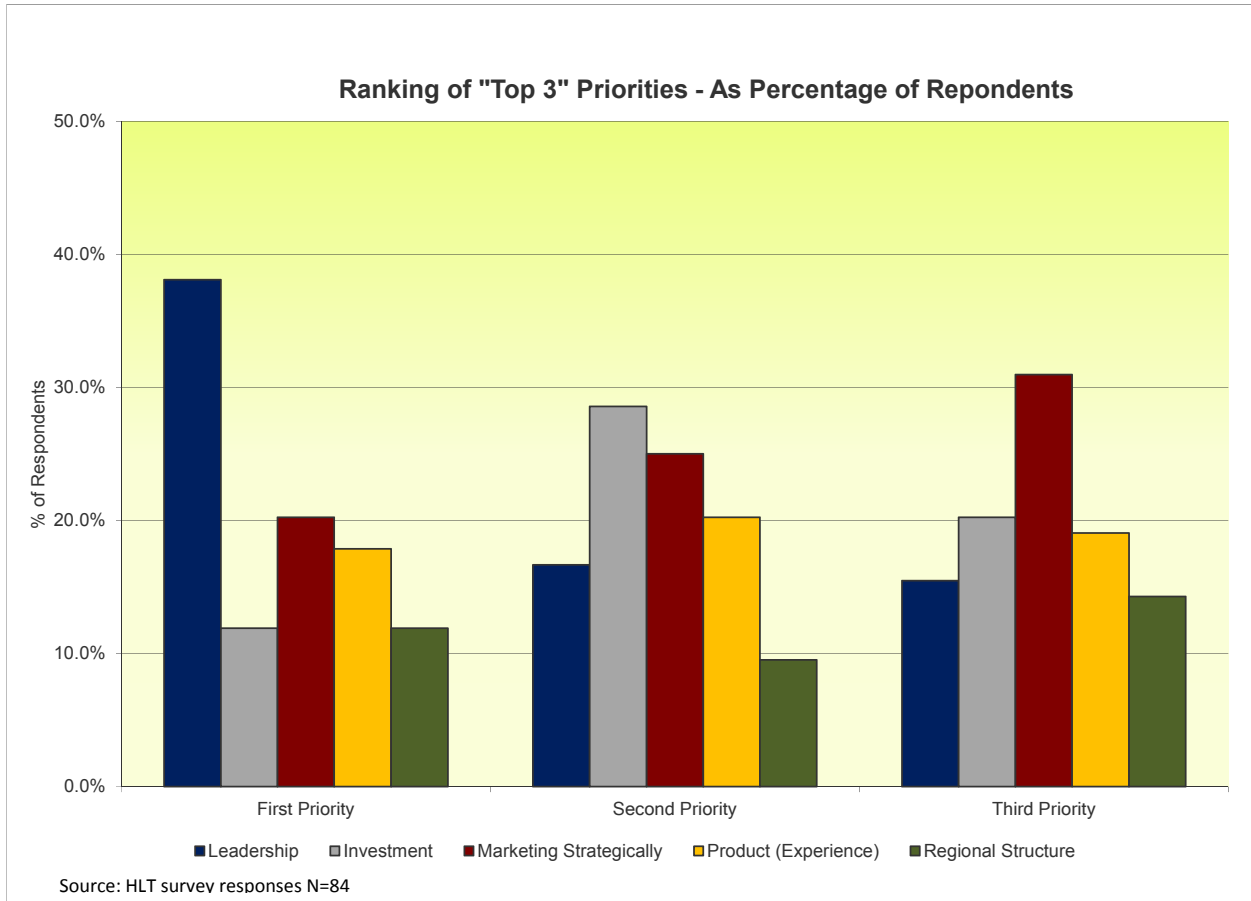
18. **Focus on our unique products:** Ontario should focus on the unique product offerings of regions including natural experiences and our great water assets as well as niche tourism experiences such as sports, cultural, culinary, eco and agricultural tourism.
19. **Improve way-finding:** Ontario needs better signage to help make the province more welcoming, safe and comfortable.
20. **Increase e-marketing and online booking:** The industry should increase internet marketing and online booking capabilities. Through its marketing agency, the Ontario government should work with industry to make it easier for consumers to book accommodations and visit attractions.

APPENDIX C

RESULTS FROM ATTENDEE E-SURVEY

(Note: Minor spelling, grammatical and typographical changes were made to the Attendee E-Survey comments. The meaning of the comments remains unaltered.)

Q.1: In each session we discussed five priority areas (in no particular order) specifically: Leadership, Investment, Marketing Strategically, Product (Experience) and Regional Structure. Please choose and rank your top three priorities over the short-term (next three years).



Q.2: Are there specific issues/strategies/focus areas within one or more of the five priority areas that you see as "must dos" over the short term (next 3 years)? Please share your comments on at least one priority area.

Leadership (reprinted verbatim)

- Get behind Discovering Ontario Report, action recommendations, measure performance, and lead industry to do better.
- Identify team of local stakeholder activists.
- The Premier and Ministers w/tourism-related portfolios must be seen, heard and clearly understood to embrace tourism as a Tier One industry through policies that serve to both underpin and continuously improve and expand Ontario's ability to generate jobs and revenue through visitor attraction - and thus be seen, heard and clearly understood by the Ontario government at large ... by municipal government political leaders ... by municipal economic development and tourism department

- officials ... and by Ontario's private sector - in particular the financial services and investment communities - as a Tier One employment and revenue generator.
- Needs to be a restructuring of DMO's staff operating these organizations as they do not have the skill sets to make the necessary changes.
 - TIAO is a clear Industry Leader and would love to see this organization continue to spearhead changes necessary for our industry.
 - Must work to position tourism as a priority industry with government.
 - Government moves further away from support of the industry while our neighbours bombard our TV with advertising taking our market south.
 - Make the leadership more hands-on with "boots on the ground."
 - Tourism by its nature has a short-term focus. Longer term, strategic leadership is needed in the industry.
 - Confirm long term support for Tourism.
 - Clear leadership with all RTOs with the goal of increasing Ontario tourism as a whole.
 - All levels of Government need to provide leadership in order to reach goals and objectives for tourism.
 - Strong government support.
 - We need leaders who want the best for all stakeholders and guests. Develop relationships with grass roots stakeholders as well as larger investors. Leadership with a "guest first" and true regional approach.
 - RTO's need to cause "alignment" in the industry that understands small business challenges that can pull a team together. Guidance from government does need to take the lead but they need to get out of our way, support us through policies and investment.
 - Tourism minded people
 - MTCS - needs to engage in a PR campaign to tout the successes of the RTOs, DMOs and individual operators in the tourism industry. The effect of this touting is that other ministries/organizations will start to take notice that tourism is a serious business. This recognition will cascade throughout the province and improve the perception of the industry, an improved perception could mean improved workforce recruiting (higher skilled and better educated), access to capital (confidence by the banks), improved way-finding (MTO would be more flexible).
 - Direction, support, consistency
 - Create advisory council for RTO's.
 - Address issues around TSSA standards in rural Ontario (e.g., marinas, water, etc.)
 - Advocacy
 - Have a plan and execute it.
 - Continue to promote workforce development, economic value of sector, work with senior levels of government.
 - Empower the regional structure to be the tourism leader
 - Create a single (private) entity responsible for marketing Ontario domestically and internationally.
 - We need a "visionary" CEO over tourism in Ontario. A figurehead who can play the political game and yet have the leadership skills to work with all the tourism organisations.

- Tourism industry related training for our operators.
- Make one person or organization in charge to make decisions and ensure all RTOs are working cohesively.
- For clarity, please create a flow chart to show what roles exist and contact information for who fills these positions.
- Tourism needs to be a stand-alone ministry.
- Provide resources (internet site), partnerships in marketing.
- Real, current statistics
- There must be a system in place to lead the process
- Create incentives
- Leadership in sharing info and getting regions to work together.
- Capture the attention of the Premier and Cabinet for a whole-of-government approach to growing tourism.
- Take politics out of tourism.
- The province needs to promote/restore the Ontario brand.
- Get the right leader in place to create the right marketing for the specific area.
- All levels of government have to take tourism seriously. The northern experience especially on the top of Lake Superior is equivalent to the Newfoundland experience for soft adventure and should be marketed as such. The leaders in charge have to understand that the product in their own backyard is as good as anywhere in the country.
- Communication strategy needs to be established.
- Strong leadership is essential for achieving progress on all of the other suggested priorities. I hope to see TIAO further develop its role in this area. We need a strong voice at both the provincial and federal tables.
- Business/Communications Plan for each year.
- Better communication from the Ministry.

Investment

- Once we know how we need to enhance/further develop existing and new tourism products need to find a way to pay for it.
- Basic support from municipality - experienced staff / hard copy & social media promotion / grants to help develop & expand current sites/events/services.
- Investment extent/timing relies on the financial services and investment communities seeing:
 - Ontario actively embrace/support tourism as a Tier One employment and revenue generator.
 - Municipal leaders and economic development/tourism officials acting on this understanding.
 - Evidence the Ontario government is committed to high-level tourism industry marketing and management support ... province-wide ... regionally ... and locally via its Regional Structure.
 - Highly-targeted, cost-sustainable, multimedia marketing plans measurably attracting visitors.

- Evidence of sustainable growth in visitor attraction, visitor stays, visitor spend, visitor return
- Private sector co-op marketing fund, road side rests, 4 lane trans provincial highway.
- We live in such a beautiful province... funding for so many organizations trying to showcase and bring together communities is crucial.
- Funding for adequate leadership.
- Again government has been exiting areas of need to our industry and province.
- There needs to be a continuity of funding opportunities without the program criteria, eligibility and dates changing each year.
- Although not identified above as a priority, investment goes hand-in-hand with product development.
- Destination marketing fees should be a discussion topic.
- Attract private investors for attractions.
- Help new attractions get started. The big money making attractions usually have the budget to help themselves.
- Develop programs that allow tourism businesses to revitalize tired facilities that do not require immediate hiring of new employees.
- Funnel dollars down so small organizations can leverage local funding to maximize opportunities.
- Roads and signage, rest stops.
- It would help to focus investment decisions if we had an Ontario waterways strategy - We are blessed with incredible waterways but we don't currently capitalize on the potential (i.e.: small cruise ships, luxury paddling).
- give the full 3% in HST back to the RTOs that was taken 3-4 years ago
- Invest in new product.
- Investment and leveraging is easier when we get buy in from all. Not just financial investment but work together.
- This area is nascent and ill-defined at a provincial, regional and local level. There is a lot of talk about investment development but no cohesive strategy as of yet.
- Provide access to upgrade loans for existing small businesses.
- We need jobs and economic growth to build a stronger Ontario and tourism is one strong way to do it.
- Long term commitment
- Without question we are not able to compete nationally or provincially with marketing budgets well below any relevant competition. Current formula is not logical or sustainable in the marketplace. Further, it does not balance with the value created by our industry.
- Access to capital (loan guarantees too) - this cannot be stressed enough and has been for years, why is it still not happening - wait much longer and there will not be product to invest in.
- Why is Ontario Place a priority?
- In rural Ontario some communities survive based on one or two tourism operators and if they are unsuccessful a village can close up. Mining towns are not the only ones that face this dilemma.
- Transit infrastructure is very important.

- Cut the red tape.
- Positioning for private sector investment/support.
- Allow access to operators allowing them to reinvent themselves.
- Province wide DMF
- Focus less on big, urban attractions and more on tourism infrastructure/connectors (i.e. connectivity of trails/bikes/trains).
- More investment in tourism in northern Ontario
- Create a provincial governmental tourism levy that will provide stable and secure Tourism funding.
- Transportation; expansion of Go Transit to Peterborough, 115, and regional air transit.
- Everybody wants money, funding, government grants...but receiving updates on what is going on across the province would be great. Might overburden current staff, but knowing where energy and commitments have been placed would be great.
- Help with loan guarantee to develop attractions.
- Invest in courses that build capacity and identify opportunities. work with regional structures using the GMIST example of western NFLD
- Create tax breaks
- Invest in better infrastructure to make it easy for consumers to get to and around their destinations.
- Bridge the gap between province and municipalities, making it easier for potential investors to actually put a shovel in the ground.
- More investment is required to drive individuals to areas.
- Money from government needs to increase.
- We have to figure out a way to stabilize regional funding so the RTO can survive. If not they will disappear like everything else. I am a big advocate of hotel taxes
- Small business investment.

Marketing Strategically

- Cannot market strategically until we have a marketable product that is best in the world.
- Solidify current visitors - expand outward. Who is interested in what is here already? Tell them we can offer them something in their area of interest.
- Align resources and messaging for major impact.
- There needs to be more coordination between the province and the RTOs - everyone is targeting the same domestic geographic markets.
- Farm out marketing plan to private interests and quadruple the ad budget.
- All regional organizations to promote their "tourism assets" within their respective regions and the province to promote "higher profile and/or unique" attractions and events to neighbouring provinces and states!
- Allowing everyone to work towards same goals.
- Marketing greatly influences the regions success, branding is important.
- More natural attractions and less artificial. Several ads, not one trying to demonstrate all.

- More co-op marketing opportunities at a realistic price point.
- Assistance and collaboration with grass roots is a must.
- OMTPC should take more leadership well in advance.
- RTOs should be working together and not against each other. Marketing to the upper USA as they can drive into Canada taking advantage of all experiences. Not so much to the international market as we don't have proper transit in place to really travel anywhere.
- Marketing to the US is vital to the success of tourism in all areas of the province.
- This needs to have governments align with industry to be effective. The relative position of Canada and Ontario must be obvious...we need to be competitive consistently at a world leading standard.
- Experiences geographically designed.
- A marketing vision for all to buy into. Marketing with guest in mind increases length of stay.
- RTO's need to champion the fact that a huge % of all tourism marketing is ineffective. The only way to do this is to establish measurement systems to prove efficacy (or lack thereof).
- Invest in the US.
- Need one person or company behind this to build a consistent message and align all the difference regions so people hear and see our message over and over again until they don't forget it!
- Clear vision and opportunities
- Marketing - There is confusion on roles & responsibilities. OTMPC has the opportunity to be the leader in this but with cut backs has had to make decisions that removes them from the grass roots. OTMPC can be a leader in providing direction, education and ultimately marketing support in the international market. RTOs and DMOs outside of the big three are limited on their effectiveness in the international market. OTMPC is trying to do too much with limited budgets and always seem to be trying to sell instead of lead - have them concentrate on international marketing where they have the expertise and move away from promoting within province.
- Requires adaptability, nimbleness
- Branding of Ontario tourism and related outreach.
- Bigger buy allowing DMOs to afford to be where they couldn't on their own.
- A unified message that leads consumers to more information they are looking for would be very valuable.
- DMOs should market to Ontario; the province should deal with external markets
- Identification of medium/long term major events strategy (and how the entire tourism industry can be engaged in the process).
- Continue to market the region to Canadians and North Americans and ensure that brand messaging is consistent.
- Align OTMPC efforts outside province with local/regional efforts.
- The province needs to look at its target markets.
- Let the RTOs handle marketing.
- Create a funding formula that would provide stable marketing funds for the province and for tourism regions.

- Continue to focus on our key markets especially the US.
- Focus on nature and unique tourism experiences.
- Redundant advertising is costly. There are so many guide books and pamphlets; it would be nice to have an annual review of who produces the highest quality and most informative guide books.
- Let the region that has the knowledge do it.
- Look at niche markets, fish where the fish are.
- Strategies to attract Canadians to see their own country are lacking.
- Everyone must work together to use the dollars appropriately.
- Market the natural product already in existence, vistas, canyons, nature hikes, ice climbing etc...
- Invest in attracting international visitors which brings foreign dollars into the economy (more impactful than moving domestic dollars around the province).
- OTMP has lost focus of whom and what they are and how they should be spreading the word about Ontario - their role should be to get the message out to the markets: "Ontario is an amazing place to visit." then let the rest of us who do this for a living close the deal.
- Can't be top down. OTMPC should be telling the story of each of the regions to the segments who best represent the experiences of those regions
- Needs to be targeted and co-ordinated. Number of American visitors needs to be increased.
- Collaborate between regions.
- Identify the best products for the various regions that can be packaged and then marketed to create distinct destinations.
- Roles and functions should be outlined.
- Getting the word out about all of the products and experiences available in Ontario is key.
- Consistent strategy/campaign.
- OTMPC has no strategy and the left hand does not know what the right is doing.

Product (Experience)

- Significant product gap...need tourism product development in a big way.
- Facilitate multi-layered experiences (related sites of interest with special food options with overnight facilities).
- Look at geo-bundling as well as sectoral (experiential) bundling.
- A decision should be made as to the experiences that are to be marketed.
- Support networks and funding of independent tourism businesses! These companies are the backbone to any tourist experience.
- What does the province have to offer and how do the owners of tourist properties see what they themselves are aware of.
- Way-finding to connect areas.
- Assistance and collaboration with grass roots a must.
- Develop more products outside of Toronto, Ottawa.
- Provide support (guidance) to tourism businesses that will encourage them to look at and invest in additional tourism products.

- The province needs new, big, anchor attractions.
- We are not taking advantage of or leveraging all the potential we have with Ontario's only UNESCO World Heritage Site - The Rideau Canal.
- Product can take many forms, from built infrastructure to electronic tools (locator apps, itinerary tools, virtual exploration...) but as well includes areas of destination development such as trails of all types and the necessary infrastructure with it such as specialized paddle docks, way-finding signs, cycle racks, parking at trailheads and so on. All of these types of product fit the needs of the areas/regions in which they are proposed, and should be assessed with the locale in mind and not what a ministry deems important in their minds for that area. Level the playing field for product development through ample funding and investment.
- A true "regional" product experience that showcases the complete image of the region to increase length of stay and contribute to a real guest experience.
- If the RTO's don't drive this development then who will?
- Educational sessions and long-term funding to support the operators is necessary for this to happen. Too often it is a one- or two-year commitment and then the operator is on their own. Develop products that have a market demand not just a supply demand and ensure there is a sustainability plan in place.
- Share resources
- Modernizing and finding capital for product development.
- Bundling like experiences.
- Helping erode geographic boundaries.
- Let DMOs develop the product.
- Working with First Nation tourism partners.
- Aid RTO's in funding for product development.
- Allocate a % of revenues for private/public partnerships in order to create world class tourism products.
- Attractions and unique and competitive product development.
- Insure/improve product offer in Ontario in order to attract tourism interest.
- Ontario's natural resources and tourism attractions are some of the best in the world. We are actually doing a great job collectively (Parks Canada, St. Lawrence Parks Commission). How about letting the public know that they are missing out on the domestic tourist activities that already exist?
- Developing a new attraction to act as a demand generator.
- Continue to attract new meetings, conferences and sport tournaments
- Help frame the product to appeal to the market.
- During the presentation we spoke about "we need new products." But how do we know what products are needed?
- Innovative and value added products are required.
- Work with partners to build/create that product. partners could be communities and or individual operational businesses.
- Analyze the OTMPC/RTO consumer research to develop a provincial and individual RTO product development strategy to help identify product gaps and focus areas for development and marketing.
- Starts from the bottom up. More time spent with operators to create destinations and experiences. Right now most don't even know they are in the tourism industry

- Developed by independent entrepreneurs with consistent rules to access the funding.
- We have the product; just need the right leader and marketing to make it work.
- Focus on the uniqueness of the area.
- This needs more investment and coordination in the development of the tourism sector especially incentives for improved roofed accommodations and marketing.
- Enable tourist operators to develop the products successfully. Whether it be financially, or through education or expertise.
- Lead with top experiences.

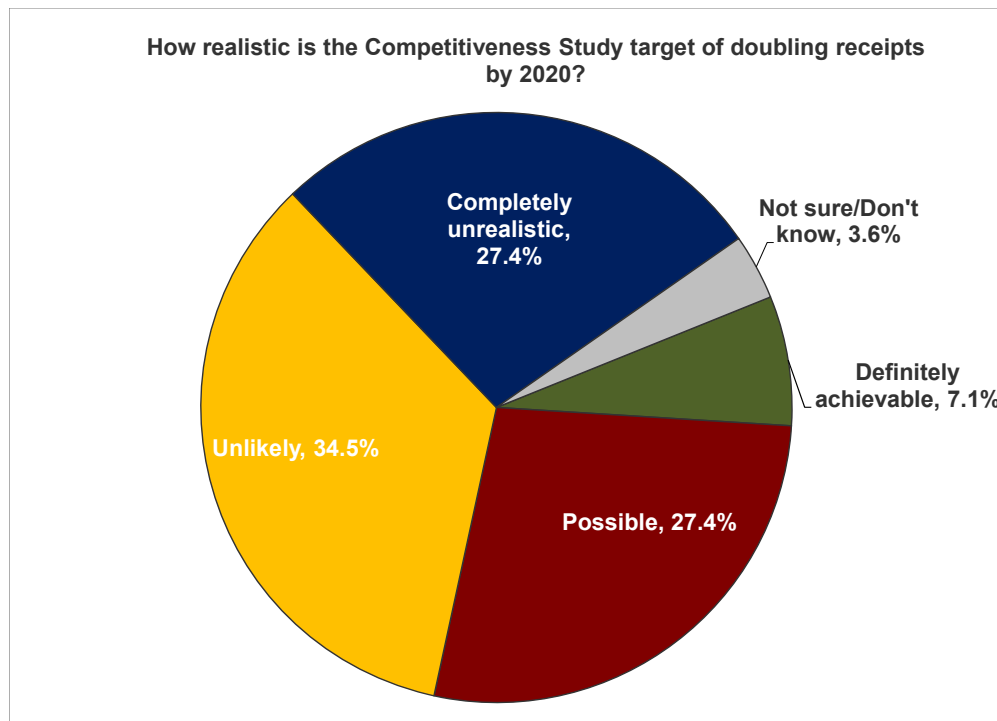
Regional Structure

- Regional structure is working for most part. Need roles and responsibilities defined province wide.
- Needs to be collaborative - working stakeholders at head supported by municipal staff and elected officials.
- ALL Regions need to focus on product development - buyable experiences.
- Agree tourism regions can best coordinate tourism marketing and management province-wide.
- Agree each region should strive to create a unique brand identity within the provincial brand, thus oppose "de-emphasis on need for unique brands at both the provincial and RTO levels."
- Agree it is "important to bring 'experiences' to the forefront," as ranked above, but the relativity of importance vis-à-vis other branding/positioning/marketing considerations is open to debate.
- Revamp RTO model which is ineffective and inequitable.
- Tap into organizations and associations who are experts within their respective industry to assist with tourism strategies, such as OCTA, FEO, TIAO, OTEC, fairs, wine growers, camping, agriculture, Attractions Ontario...
- Redirect some money to DMO to support MCIT and sport attraction.
- Please do not play with the provincial tourism regions again. Make it work. The province made the decision...they must take on the responsibility to make them work.
- Review regional structure particularly relative to the Rideau Canal and the Trent Severn waterway.
- Needs to be a value-for-money assessment of the RTO structure. How will the regional structure be sustained if/when government funding is gone?
- Much more coordination with DMO's.
- Commit to long term support for the RTO structure. All RTO's need to prove that the work they do is improving and supporting tourism of all sectors.
- Do away with it. Confusing to visitors.
- The Rideau Canal falls within 3 RTOs which creates additional administrative pressures.
- Development of regional structure for all levels of government and private investment (time & money). Many resources are not being accessed and being left behind and therefore information is not complete.

- If the RTL is off the table and DMO's are here to stay then alignment both from a resource perspective and a marketing perspective must be achieved and the RTO's need to drive this (no other group has or is doing so).
- Maintain and grow RTO's.
- Provide clearer mandates for region structure emphasising product development, collaboration not duplication and skills training.
- What's done is done.
- Greater consultation and listening to industry and DMOs.
- Leadership support from MTCS, agencies and sector groups & associations is required. The regional structure provides an opportunity for incremental support; instead many municipalities have considered it a replacement for their current tourism programs. This is an opportunity to increase the support for tourism not replace it.
- Knock down the silos.
- Financial assistance, representation Ontario in marketplace not totally RTO/DMO driven.
- Increased cooperation between the DMOs, RTO, etc.
- Make them sustainable.
- Region could coordinate but should largely be pass through funding where there is no brand to speak of.
- Lessen regional "brand confusion" by focusing RTO activities on workforce and not marketing.
- Long term financial commitment to the regional structures to allow for long term planning.
- Does today work? How do we make it work? How do we communicate?
- Better communication between organizations.
- Let it be as is.
- Communication
- Review a nodal type of regional structure, communities and or regions with similarities.
- Create a sustainable and predictable funding model e.g. % of HST to fund RTOs.
- Tourism starts with the operator and needs to be supported/promoted at the municipal, DMO, RTO, provincial and federal levels. You can't have too many people focused on supporting and promoting tourism. RTO's play a key role in working at the operator, municipal and DMO levels, keeping tourism on the map and assisting with the development of experiences and destinations that will motivate travel and are ready to be supported and promoted at the provincial and federal levels.
- Loosely knit RTO structure needs to build.
- Needs to be fixed ASAP.
- Work together, common goals.
- The regional structure especially in the northwest needs to be changed to be more reflective of the needs of the distinct areas. RTO13 is ridiculously big and does not make any sense.

- This is working and should be further supported. OTMPC should have to promote all regions equally just like France promotes Alsace, Cote d'Azur, Paris, Provence, etc. Help build branded areas of Ontario.

Q.3: How realistic is the Competitiveness Study target of doubling receipts by 2020 (to \$44 billion given the current 2012 total of \$28 billion)?



Comments

- If we had all got behind the Report in the beginning and raised yield by 7% a year that alone would do it...add in product development, new markets etc. definitely doable...don't listen to nay sayers!
- Possible - if resources are pooled and target markets are hit consistently, with effective messages.
- It is only possible if governments at three levels are made more cognizant and actively supportive of tourism as a Tier 1 employment and revenue generator, thus paving the way for the private sector - in particular the financial services and investment communities - to come to share that view, and be willing to finance and/or invest in tourism product opportunities.
- A lot of DMOs are finding that traditional media purchases are not achieving measurable results. This spending culture has to change before these results can be obtained.
- Where is the capacity to double this coming from? Unless twice as many attractions and amenities open up this isn't plausible. Perhaps if everyone doubles their rates, but that's not a good idea either.

- It easy to sit in Toronto and make statements that cannot be attained with what they have been attempting to accomplish with their own efforts. Keep reducing the investment from our government is the greatest restriction on the growth that they hope to attain. Big projects such as Ontario Place will look good for Toronto but how do these projects help the north.
- The target was originally set with no grounding in reality.
- Competing against ourselves for same domestic dollars.
- I think that some of the funding for tourism should be used to help new tourism ideas. I'm thinking a tourism business incubator, directed to new tourism ideas. Each RTO could have the responsibility to help new business ideas get off the ground or the expansion of a business into a different market. I'm sure there are many ways to go about this but I think it could work.
- We still need these goals in order to focus efforts and to measure our successes.
- Based on information gleaned during our session - including airline tickets that take tourists outside the country do not increase tourism in our country - therefore stats are suspect; can't trust the numbers.
- Requires substantial industry collaboration and government buy-in and investment. Operators must also improve service levels and ensure a top quality customer experience to be recognized as a world leader.
- Until the Government looks at tourism as a crucial component of the economy, it isn't likely to get the support it needs.
- This is not just about marketing approaches. New factors contribute every day to the difficulties of increasing revenues from tourism. Global competition #1. Prices of gas, fuel, product and cultural experiences around the world.
- Goal - Strategy - Measurement, the last two components are works in progress with some leadership being shown but as long as we simply use Stats Can data to interpret growth we will not be tying the work of any agency provincial regional or local directly to the goal. Tourism has to grow up and start implementing its own systems for targeting and measuring growth across the board.
- Past statistics and trends don't show that big of growth over any length of period. We need a more realistic growth strategy that can be accomplished and bench marked.
- Budgets and marketing strategies from federal to provincial levels do not make this possible.
- The math doesn't work. To outperform the provincial growth indexes by 3-6 times in an industry that was and in many cases on its heels is unrealistic.
- Economy, competitive set. Relying on RTO's individually, DMO's who are struggling with funding - these receipts do not make sense, unless change in basic definition of "tourist."
- Canada is losing market share in the global context, so it is difficult to imagine this type of growth.
- Need more investment and transparency.
- I don't think tourism receipts is the best measure. Better to focus on other measurables (i.e. visitor spending, workforce stats) of Ontario travel.
- With Stats Canada lumping in amounts spent by Canadians leaving the country in tourism gives a VERY unrealistic view of domestic tourism dollars.

- Without additional funding, we will most likely see our share of international tourism receipts remain stagnant.
- Whatever the number we need a goal.
- It's possible with the right investments to support the required actions.
- Canada continues to lose market share.
- This is something I'm not currently able to address with any certainty.
- Without increased government investment in the industry to improve/develop product growth on this scale will not happen.
- The wage increases and pension payroll tax will hold back small operators from expansion.
- Total political nonsense.
- I cannot see doubling receipts within 6 years. If perhaps we had a world fair in 2020 we could achieve for that one year. But without doing something extraordinary, I could see 5% to 10% a year. If we do 50 % increase within 6 years, it would be reasonable.
- Has this ever been done before? if yes- how?
- 2/3 of Ontario is not marketed and yet many of our European visitors are looking for that natural wild experience. Yet the GTA is strongly marketed. Diversify our provincial campaign!
- If the targets and measurement metrics were well understood and communicated maybe there would be a better buy in. The industry is not really working together. Maybe a few are but there need to more a provincial team effort.
- Need to get structure and analysis in place first. Suggest 10 year target of doubling tourist receipts after this is in place. Challenge the government to create provincial strategy with timelines and measurement not just for RTOs).
- In all of my years of being involved with OTMP I have seen a huge disconnect on their part from understanding their role as an agency to increase awareness of what Ontario has to offer to the travelling public. They stepped away from the US, our largest non-domestic market years ago and you do not increase your receipts as a province by spreading Ontario money around Ontario. And now with their lack of market focus and promoting price-point marketing, they stand little chance of ever reaching their goal.
- We haven't moved the needle that much yet. Having a hard ceiling on tourism receipts doesn't make any sense. What we should be striving for is matching and exceeding the average North American tourism growth rate. It's at 4% and Ontario is at 0.6%. Over the next five years, the goal should be to move the needle to 4% yearly growth.
- It is achievable if the investment and marketing required are put in place.
- This will only occur if funding in the industry for both marketing and product development increases. Use the Newfoundland example for one. We have a huge market in Ontario and most people from Ontario don't even realize what is in their own back yard. Let's create a sense of wonder for our own province.
- A renewed push to attract the US market with its repeat visit multiplier is far more likely help us achieve the target than the development of the BRIC markets.

Q.4: What is the best method to improve communication to/within the Ontario tourism industry? Share your thoughts on responsibilities, communication channels, content or any other input.

- I don't think it's the communication that needs to be improved - it's the listening that needs improvement.
- Everyone complains about communication however a provincial tourism communication strategy outlining who does what...right now a medley of interests all vying for operator attention.
- If we knew this, we would be magic.
- We want government agencies to lead in a timely manner, well ahead of deadlines, with targeted, effective messaging that ultimately benefits all of us.
- Members of sectoral associations feed sector associations - trends, metrics, and forecasts. Sector Associations feed TIAO. RTOs feed Ministry - metrics. OTMPC work closely with Sector Associations and RTOs to streamline tactics and collective investment.
- I think the industry does a good job of communicating within the industry. The importance of the industry is well established within the industry. The industry has to do a better job of communicating its importance to key stakeholders outside the industry, e.g., three levels of government and the financial services and investment communities.
- Revamp RTO model.
- Email communication to all tourism destinations. Large or small is the best communication. Tourism departments should have a person designated as the Communications Officer.
- Through the RTO system.
- All representatives need to be at the same table.
- Important responsibility to communicate with all of Ontario.
- Right now the Province uses RTO to be conduit to industry. DMO's need support and to play a role.
- An open discussion forum. Transparent actions through the use of public information systems.
- Improved communication to both RTO and DMO. Ongoing important role for TIAO to provide leadership and liaison with government relations and industry.
- Let's consider the associations that are the voice of its members. Groups such as NOTO and Resorts Ontario. Find ways to use and support these associations to bring the government the voices of the tourism members.
- Keep it simple!
- Regular email updates on issues impacting the industry. Also need a two-way mechanism so tourism businesses and organizations can provide input and feedback on issues.
- The use of social media is a good communication channel.
- Clarify roles of all players so industry partners are not inundated with information.
- Free membership to updates and newsletters so everyone is involved.
- TIAO, sector organizations, regional organizations are all good vehicles to increase communications from government, and other tourism organizations to the private businesses that are the backbone of our industry. It is important to have

government regulation changes channeled through these organizations so that changes affecting tourism businesses can be explained in plain English. It is also important for small business owners to know what initiatives are going on around them in order to engage them and keep them poised for growth. It is all of our responsibility to ensure that our tourism businesses are kept up to date on issues, initiatives, training opportunities, funding opportunities and anything else that impacts tourism whether it is positive or negative.

- Digital newsletters / blogs / Facebook.
- Email and conferences.
- Sessions like these should be held regularly.
- Have these traveling focus groups so the operators don't have to travel to Southern Ontario.
- RTOs must recognize the significant roles that the DMOs play and have played for many years.
- Regular meeting with the Deputy and monthly newsletters.
- Empower the regional offices to make decisions and direct investment at these local levels. At present, the chain of command is top heavy, with a built-in slow response time because of that.
- Get new people on provincial boards. This cannot be a popularity contest. We need the view of many. "Surround yourself with people who do not think like you" General R.J. Hillier. Audit each RTO's mandate to confirm all components are being met such as product development.
- Amplify this mandate with the RTOs.
- I think TIAO is the key to link all aspects of tourism communication.
- Difficult question - use existing channels such as DMO and sector organizations.
- Email updates.
- One central organization being the face and body of Tourism in Ontario. Then we all know who to go to and who is responsible if we succeed or fail!
- There needs to be a consistent message from all levels CTC, OTMPC, RTO, DMO.
- Marketing coordination meetings federally, provincially regionally on an annual basis to coordinate spend targets and messaging.
- Return on investment; economic benefits; credible incremental results separate from those of the industry best practices;
- TRUST. Improved trust will improve communication. There exists an "us/them" mentality within this industry. Often by groups trying to achieve the same thing. An improved level of trust will pave the way for open dialogue, at this point it is guarded conversation. There is a suspicion of back-room deals, alternative agendas, priority stakeholders, why them not me... This needs to end then the communication starts. How to create a level of trust?
- More face-to-face opportunities to share and consult.
- Provide a reason to listen, communication must be relevant, some prospect of shared vision.
- More engaged OTMPC, TIAO with RTO'S. Create a council or Board???
- The newsletters are effective but panel based webcasts on particular topics might assist those outside of the GTA in accessing discussions that impact a larger audience.

- Frequent, timely, topical provide sound bites to DMOs helping support that fact we are a tourism driver and job creator.
- Meetings, teleconferences, etc.
- DMOs should do the communicating on behalf of all levels of the tourism industry to avoid confusion over programming and responsibilities.
- Staying on top of social media trends as they related to the B2B space (i.e. newsfeeds, podcasts, etc.).
- Social Media, Newsletters, Webinars.
- This is difficult. Strong website and regular e-news communication is key.
- RTOs -DMOs and then to local organizations. Actually listen to small business tourist operators about concerns and challenges.
- MTCS to OTMPC and RTOs to industry partners.
- Create a tourism body where there is one cohesive voice speaking and lobbying on behalf of tourism - today it is simply too fragmented (TAIO, OTMP, DMO's, Regions, etc.).
- Comes from the top, forget paper, all email and web based... stop sending huge brochures, even though they are very nice!!
- Ontario Tourism/TIAO LinkedIn space to share best practices, ideas, trends, etc. Encourage your tourism "champions" to develop content in this space and ensure that the space has a continuous flow of information.
- Lobbying federal and provincial governments
- Have one organization to which all tourism related businesses belong (without fees) so that communication is widespread. Revenue required to run the organization can be earned through "opt-in" programs. Otherwise, a basic member gets communication via emails.
- In addition to having an AGM, why not try to practice our social media and webinar abilities. Are we capable of coordinating an annual online conference? I think the technology is there. Any suggestions on how to do an online conference?
- One-on-one meeting with org. and inform municipal councils how important tourism is to the economy
- TIAO must continue to establish itself as the sole contact between the industry and government.
- RTOs need to be more accessible to tourism partners and involve them in decision making.
- Monthly newsletter to DMF, DMO, RTO.
- In depth statistical analysis on actual Ontario sales for inbound tourism only.
- This kind of survey is a good start to take the pulse of the industry.
- Collect input about accomplishments and challenges more frequently than currently is done to keep abreast of the state of the industry.
- We need a strategic plan with leadership defined then communication will come naturally as people will know what their responsibilities are and work toward a common goal.
- Face to face communication with hands-on employees in the industry.
- If a regional structure is in place with representatives from each of the communities integrated within that structure, the message/communications will be shared.

- Regional meetings
- Regular communications on what is happening in the industry. Committees that exist now don't share their information with the province. DMOs that are working in market aren't aware of some of the existing good products, so no new product is being cultivated to bring to market. The Province has to keep offering reasons for clients to come back.
- TIAO's annual summit, newsletter, town halls in regions.
- We have a very effective RTO in our region and they do an excellent job of communicating to the industry. Unfortunately even though the Province created these new regional organizations, though the industry did not ask for them, we have them now and ours works. The government needs to just let them and us do what we know how to do and flow the money through the RTOs without all the increasing levels of bureaucracy that only impedes success.
- First, make sure operators understand the importance of the tourism industry to their bottom line. Then they may start to read the stuff that is already coming across their desks.
- Lack of knowledge didn't appear to be an issue at this session or other settings. Roles and responsibilities needs to be clearly established.
- Better leadership for each area.
- Communications is always a challenge and will only work if you have good communicators in the right places. Trying to find an easy fix or structure rarely works without the right people doing the communicating.
- Ministry newsletters to interested stakeholders. Pushing communications through field advisors is great. Webinars might also be a great strategy for new projects, strategic direction and other important announcements. There needs to be communications between ministries as well. Tourism needs to put our agenda on the agenda of others.
- A challenge to be sure. However, I don't believe that it is possible to get the many diverse players in a room for constant face-to-face meetings. Development of and use of today's technologies to facilitate communication is vital.
- The RTOs are a great channel to communicate through. But there needs to be someone communicating to them, what to communicate to tourist operators. There isn't enough consistency among the different RTOs.
- Private & public partnerships including media.
- RTOs should be fully open and transparent and should not have to collaborate with any stakeholder (Chamber DMO etc.) that isn't also fully transparent.

Q.5: How do we create a culture of ground-up leadership with more grassroots involvement (i.e., tourism operators) in setting goals and holding key players accountable?

- Find the leaders...not the complainers. Lead with the best...reward/acknowledge those who do well...culture of change/quality needed.
- Municipal staff needs to acknowledge that there is knowledge and commitment in the field and support what is being done by the grassroots people instead of acting as if municipal staff "know it all."

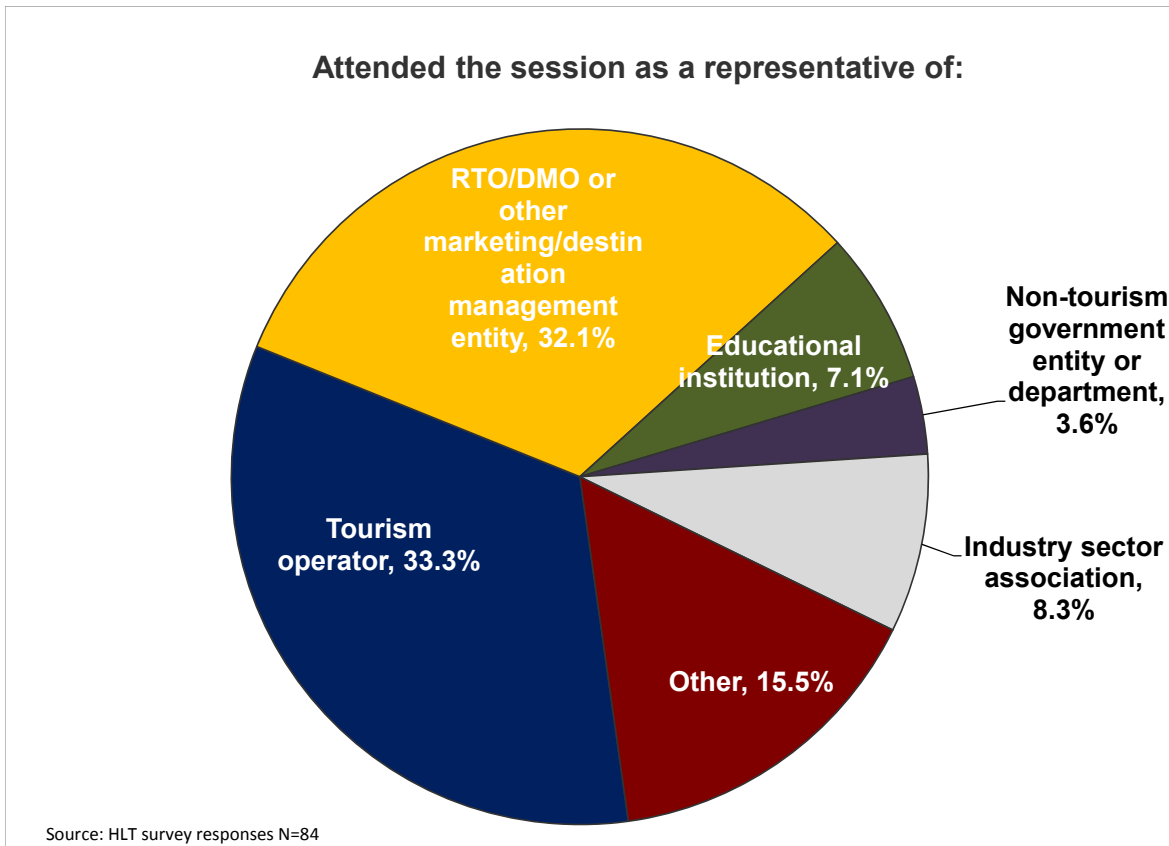
- I don't want ground up leadership. I want smart, effective, strategic leaders consulting with the industry and then executing well thought out, effective campaigns that benefit all of us.
- Engage grassroots through established sector associations.
- Grassroots leadership begins with grassroots understanding of tourism's importance and potential, and that begins with grassroots populations understanding of tourism's importance and potential, and that begins - seriously - in Junior Kindergarten, Senior Kindergarten and grades 1 to 5.
- Invite private sector to participate individually.
- Develop DMOs with private sector operators input as directors.
- Continue to bring together all industry partners—as you done with this consultation—perhaps a bi-annual meeting of the minds, so to speak...
- All representatives need to be at the same table and improve the communication.
- Financial support regarding regional collaboration and partnerships.
- Involve all players not just RTO.
- Get more funding to the smaller towns and areas to allow for tourism management. Many places that could have ground up development don't know how to and need people in place who have both time and knowledge to assist.
- Education and communication is key; adding more voice to industry encouraging more operator membership/involvement with their DMOs and even TIAO.
- By using tourist association big and small to deliver encourage, positive, opportunities available to them. Get out of Toronto and participate in the grassroots of the industry.
- The tourism operators are mostly small business owners and have little time to devote to leadership - most unfortunate! It is very difficult to recruit tourism operators to take on these roles, with the result that municipal staff and/or agency staff often are more involved than tourism operators.
- Implement the two-way mechanism noted above. Need to engage tourism businesses on issues they see directly impacting their business.
- Have more outreach and forums to discuss with grass roots
- They need to see some tangible results before they will buy in.
- Operators could be involved in the direction that each RTO is moving in marketing and spending. Annual or quarterly updates could be sent out prior to a meeting where operators are able to make comments or suggestions.
- NOTO has recently begun a strategy to re-engage with our members and industry by forming a number of task forces on specific issues to encourage more participation from industry. Finding volunteers is difficult so we continue to ask for input from the industry on a regular basis on issues facing our industry. We are finding that leaders are emerging from our grassroots which is a step in the right direction.
- Provide project funding at the ground level and let those in the business leverage local funding for marketing and product development. Mentorship can help small operators improve skills/knowledge at ground level and "grant" review teams can monitor/assess spending.
- Involvement in actual programs and packages with others that achieve market readiness standards.

- Less red tape. The first 1 to 2 years of the regions were great, and then they became just another layer of bureaucracy. Look at how many less actual operators are on the Boards now compared to 3 years ago.
- Have the government take tourism seriously. A Minister that will see the potential for growth and lead us
- RTOs must recognize the significant roles that the DMOs play and have played for many years.
- Stop trying to dictate down and remove political agenda from the Ministry.
- Apply a 'sustainability' filter to all goals, products, development and investment - everything should be judged in view of its impact and value on society, culture, environment and equitable economy. This would necessitate communication across sectors, and mean actual community engagement.
- Good question. We are doing this but not recognized by the local RTO. The door is closed.
- RTO's plain and simple.
- Listen to the stakeholders who have travelled, who have been tourists. These are the people who view the delivery of tourism in other parts of the world with a subjective eye. There are models of community engagement where tourism is important enough to have buy in from the person who delivers gas to the hotel operator. Secondly the Government of the Province of Ontario has to take tourism seriously and appoint a minister who is qualified AND who will be in office for more than a few years.
- Challenge is small tourism operators are investing all of their time and energy into running their business. They need to be involved in meaningful meetings in off peak season. A stronger need to go to them verses having them come to us.
- Yearly attendable meetings.
- Empower us! If you want us to succeed, help us communicate the policies and regulations we need or need changed!
- Ensuring there are associations in the regions such as attractions councils and hotel associations. And work closely with existing organized governances such as BIA's and chamber of commerce groups.
- RTOs should serve as the medium for this.
- In our region, there is token industry consultation; no consultative sessions to build business plan from the ground up with non-iconic, small operators and communities; regular updates | newsletters to let industry know how and where they are spending the provinces funds; provide information on the incremental economic benefits they have achieved
- Unfortunately the strongest operators and most successful are too busy or fed up with the 'system' to get and stay involved. The benefit of the affiliation to any group is not seen as rewarding enough to commit time, energy and good will. The loudest voice often wins. Leaders who are operators need to be rewarded provided with tax incentives or other incentives that are based on the success of their involvement - success of a particular program, increased sales, and increased retention. At this time the volunteers can walk away and their loss is time and energy - if they were walking away from monetary rewards they may think twice and work harder to encourage success.

- Regional working groups that include operators to guide decisions, consultations, etc.
- Provincial involvement - activity - As was in 80's.
- Private sector operators are extremely busy running their businesses. To create on-line forums, discussion on specific topics might be a good way on getting input.
- Enlist the DMOs who work with the stakeholders day-in / day-out.
- More meetings throughout different areas, advisory councils.
- Stop changing things every 2 or 3 years without any clear idea of why you are doing what you are doing. Develop a much more interesting concept of the Ontario brand and communicate it--Pure Michigan, Newfoundland seem to tell a compelling and emotive story.
- Learn from the RTO growth process to spark the grassroots initiatives through greater involvement from tourism partners with larger related initiatives (i.e. Local BIAs, government ties, etc).
- Annual meetings, brainstorming of priority sessions in August of each year, for the following year.
- Engage operators/businesses in program development, committees, and networking... ensure that there are sessions relevant to operators at the Summit, training webinars, etc.
- Have goals and actions. Tourism operators will become involved if there is a benefit to their business.
- Listen to the tourist operator and act on their concerns. Make the RTO board only business operators who have "skin in the game" and not people collecting a paycheck to be at meetings.
- Through RTO leadership.
- Firstly you have to have an up / down organisation with a vision, purpose and drive. People on the ground want to see where they are going and recognise their successes.
- Include objectives and analytics that are more rural-specific (small/medium businesses), which would increase interest from smaller players, making them feel more involved in future development and analysis.
- The general public must understand the revenue generated by tourism.
- Free membership to get communication going and motivation to get those who want to contribute, to do so.
- Although it is a generalization, the primary interest of most people is self-interest. Tourism operators want to make money. Working with tourism operators, hotel and restaurant owners can be difficult, but allowing them time to plan by providing a calendar of events early in the year is helpful. If there is a way for businessmen to plan the purchasing of their inventory (based on themes) at an early date is helpful. Make no sense to sell cowboy costumes if you are planning to host a pirate festival.
- 4 round tables a year.
- TIAO needs to continue its outreach to the industry on an ongoing basis.
- Rotate meeting locations for wider understanding of operator's needs.
- Email surveys, on different questions like the FIB.
- With real measurements.

- Everyone needs to work towards a common goal. Without that there is nowhere to start.
- Adding more regional responsibilities, holding regional staff accountable for the industries supplies/operators.
- Regional structure that identifies the wins of promoting that specific region that will also assist in common issues in product development.
- Get rid of the 'cronyism' that exists within the RTO.
- Identify roles for governments (all levels), RTOs, DMOs, and operators. Encourage each partner to live up to their role.
- That's the role of the RTO's working directly with operators, municipalities, BIA's, Chambers, Regions and DMO's. At the end of the day, tourism is only as strong as the experiences and destinations are compelling. Who's accountable? RTO's et al listed above are accountable to ensuring operators understand the importance of tourism, are supported as they develop experiences and destinations and tell the story of the created experiences and destinations to a wider market. The operators themselves are accountable for delivering the experiences. If they choose not to invest the time and effort, there is no story.
- Incent people to become involved and hand pick or groom successful individuals for specific functions.
- Give each region the ability to market the area since each area requires different marketing. One size does not fit all.
- Need a commitment from ground up to leadership and the right people in place.
- The structure on the ground has got to work for the businesses first and government second. If it works for business then government will benefit. In order for it to work on the ground, the regional structure has to make sense and it has to be funded in order to keep the energy going. Businesses only have so much time and energy and the government has got to stop expecting them to drive everything on the ground to get things done. There are many great regional ideas but someone has to do the work and business people volunteering their time only goes so far and in the end always fail. Regional development and coordination has to come from long-term sustainable funds with the direction of the development driven by the private sector.
- Work with DMOs to find out who the leaders in their areas are and engage them with specific projects or areas that are relevant to them.
- This requires the communication suggested in question 4. Increased opportunity to share and suggest at all levels will help.
- Advertise success stories. Tell other what works and what doesn't maybe in a news letter to all tourist operators. Nothing inspires someone more than seeing their competition succeeding.
- Recognition programs - signature experiences pre-requisites.
- Tourism operators want ROI - must show ROI.

Q.6: Did you attend the session as a representative of a:



Other

- Cultural / heritage advocate
- Tourism operator and industry sector association
- Consultant (2)
- Tourism operator and Chair of a DMO
- Non-profit, non-government organization that works across the four pillars of sustainability for community development.
- I am a tourism operator as well as a chair of a DMO
- Hotel GM... What I realised was how little I know about TIAO, and other tourism organisations, I know it is a two way street, I need to be more involved. TIAO listens, haven't heard it speak? CTC sends me a weekly newsletter update. etc.
- Destination Marketing Hotel Group
- Community
-
- Parks Canada (2)