



Ontario Tourism Marketing Partnership Corporation Business Plan 2016-17

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OTMPC STRATEGIC PLAN

With the 2016-17 Business Plan, OTMPC remains on course and aligned to the 2014-17 Strategic Plan:

Vision

To position Ontario as a preferred global destination.

Mission

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

Strategic Priorities:

Build and Deliver the Case for Investment

- Champion the economic value and impact of tourism industry sectors
- Create and support inter-ministerial synergies
- Generate an effective communications strategy that celebrates the tangible benefits of investing in building the Ontario tourism brand
- Enhance links to and relationships with business industry leaders (e.g. Chambers of Commerce)

Build a Powerful Brand that Drives Results

- Create and effectively execute the big brand idea – an emotional campaign to drive tourism visits and spend aligned to the brand strategy
- Focus on key target markets and their audiences using OTMPC marketing insights
- Encourage tourism industry to develop content/packages to attract the international market – ‘Ontario Signature Experiences’
- Identify and measure against key performance indicators

Develop and Execute an Effective Partnership Strategy

- Maximize stakeholder investment in OTMPC marketing programs
- Champion the Ontario brand to partners to adopt into their campaigns
- Secure new external and private sector partners to participate in OTMPC programs
- Measure and track brand alignment and partner investments

Embrace Organizational Innovation and Effectiveness

Board

- Actively participate to strengthen strategic relationships that champion and promote tourism’s value and economic impact

Committees

- Inform and advise on tourism’s value to the economy

OTMPC

- Foster a culture of leadership, passion and accountability
- Encourage and reward fact-based decision making
- Operate with an investment mindset
- Be forward looking and find new and innovative products

EXECUTIVE SUMMARY

Ontario visits are forecast to grow an average of 1.6% per year from 2013 to 2018 while visitor spending is forecast to grow an average of 7.2% per year. By 2018, total visits are forecast to reach 154 million with a visitor spend of \$30 billion supporting about 360,000 jobs.

Projections reflect that Canada's economy was hard hit by the decline in oil prices. However, Ontario's economy is expected to grow at a rate of 2.5% in 2016¹. As in the United States, consumption in the Eurozone is fueling growth, however that growth is uneven. Growth rates have slowed in China. Economic growth in China is forecast at 6.6%, while many of the emerging markets are weak.

Safety and security remains a concern, and the Fall 2015 terrorist attacks will likely lead to increased security measures, especially at airports. Despite this uncertain economic environment, global travel is continuing to grow.

The travel forecast to 2018 from the Ministry of Tourism, Culture and Sport (MTCS) indicates² an average annual visitation growth rate of almost 1.4% from within Ontario, 8.6% from overseas countries – and 1.5% growth from the U.S. Still, Ontario's key traditional source markets, including Ontario, the U.S. and the United Kingdom, along with China, will continue to account for the largest volume of inbound visits and visitor expenditures in absolute terms.

The 2016-17 Business Plan marks year three of the Ontario Tourism Marketing Partnership Corporation's (OTMPC's) Strategic Plan 2014-17. The Business Plan is designed to grow visitation and visitor expenditures, aligned to the Strategic Plan's four strategic priorities. Ongoing analysis of performance in conjunction with market and visitation forecasts will inform any necessary course correction throughout the year. This information will also

inform development of the Business Plan for year four, 2017-18.

With regards to *Building a Powerful Brand That Drives Results*, OTMPC will focus on promotional campaigns designed to position Ontario as a preferred global destination, in part through the development of a major brand video piece destined for television and digital distribution. This follows on the success of two commercials, 'Invade' and 'Get Ready', created as part of the Epic Is ON campaign for the 2015 Pan Am / Parapan Am Games. OTMPC's "Invade" commercial a number of prestigious awards including New York's CLIO for Film Technique and two ADCC - The Advertising & Design Club of Canada awards, one for Cinematography - Single, the other for Direction – Single; five top Bessies Awards. OTMPC's International Marketing division will implement new levels of investment in the three-tiered marketing approach based on the Destination Canada (DC) evidence-driven model designed to optimize return on investment

In 2016, with regards to *Developing and Executing an Effective Partnership Strategy*, OTMPC will continue to focus on leveraging collaborations and co-investing with accommodation, airlines, and other transportation partners and developing missions in international countries that expand awareness of Ontario tourism assets beyond Toronto, Ottawa and Niagara Falls. In 2015, OTMPC's Industry Relations met to discuss existing and future partnerships with the Ontario Hotel Association, Porter Airlines, Westjet Airlines, Air Canada, NHL, Oxford Properties and a wide variety of tourism operators, 11 of the 13 RTOs, and 10 government tourism agencies including Art Gallery of Ontario, Ontario Science Centre, Ontario Heritage Trust, Royal Botanical Gardens, Royal Ontario Museum, Huronia Historical Parks, Fort William Historical Park, Niagara Parks Commission, St. Lawrence Parks Commission, and Ontario Parks, as well as a number of tourism operators. OTMPC will also prioritize collaborations with Ontario's francophone community through marketing the Circuit Champlain, with indigenous peoples by supporting the Aboriginal Tourism 2020

¹ RBC Provincial Outlook, September 2015

² MTCS, Ontario Tourism Outlook, May 2015

strategy developed by Great Spirit Circle Trail in consultation with 130 communities across Ontario, and with Northern Ontario Tourism and Ontario visual arts galleries by supporting international awareness of the Group of Seven.

Embracing Organizational Innovation and Effectiveness, OTMPC will focus on ongoing training for staff in leadership, communications and product knowledge. In 2015 OTMPC achieved Excellence Canada Level 2 for continuous improvement and completed a five-module training course provided to management leaders and 22 'informal leaders'. OTMPC will engage in implementation of the learnings from this course to enhance organizational culture, continuing the move away from a hierarchical approach, to a clan and adhocracy or creative innovation approach, following the 2014 staff assessment based on Cameron and Quinn's Diagnosing and Changing Organizational Culture.

Mandate Review

The Government of Ontario undertakes periodic reviews of government agencies. OTMPC's review is planned to take place in Q4 of 2015-16 with results available for the government's consideration in the summer of 2016. These reviews analyze the agency role, structure and efficacy of the delivery of mandated programs and services.

ENVIRONMENTAL SCAN

Global Economic Environment

According to Oxford Economics, the global economy is facing substantial risks and headwinds with a recovery of developed economies contrasting a slowdown in developing and emerging markets.

The U.S. has been going through its slowest post-recession recovery since 1975, with just over 2% GDP growth rate for the past two years. A tightening labour market resulting in wage increases, high consumer confidence, low inflation and low gas prices are expected

to contribute to consumer spending leading a somewhat stronger economic growth (2.5%).³

Canada's economy was hard hit by the decline in oil prices. However, Ontario's economy is expected to pick up pace. After recent disruptions in the province's auto sector, stronger U.S. growth, lower oil prices and a more competitively valued Canadian dollar could support stronger growth⁴ with an anticipated growth rate of 2.5% in 2016.⁵

In the Eurozone, GDP growth is projected to rise to almost 2 per cent in 2016 and 2017. Economic activity will continue to be supported by sustained monetary stimulus and lower oil prices⁶. Growth in the Eurozone is uneven, with the strength in Germany offset by contracting or stagnant activity in several other countries.

Growth rates have slowed in China. A sharp decline in housing prices, contraction in investment and industrial production, and an 11% price competitiveness loss due to exchange rates all point to risks to economic growth not only for China but the global economy. However, China has the resources and liquidity to counter these risks with policy measures and temper the effects of a downturn. China's projected growth of 6.6%⁷ remains higher than many G20 countries. China has now surpassed all other countries to become the number one source of outbound tourism in the world, and the third-largest inbound market for Ontario after the U.S. and U.K. in terms of visitation.

Economic growth in India (7.5%) has overtaken China, however many of the

³ Oxford Economics Global Economic Outlook, October 2015

⁴ 2015 Ontario Budget, Ontario's Economic Outlook and Fiscal Plan

⁵ RBC Provincial Outlook, December 2015

⁶ OECD Economic Forecast, November 2015

⁷ Oxford Economics, Outlook Forum presentation, October, 2015

emerging markets are weak. As a result, global growth has shifted to developed countries.⁸

Safety and security remains a concern, and the Fall 2015 terrorist attacks will likely lead to increased security measures especially at airports.

Despite this uncertain economic environment, global travel is continuing to grow. According to the United Nations World Tourism Organization (UNWTO), international arrivals of overnight visitors grew by 4% in the first half of 2015.⁹

Competitive Environment

Ontario's tourism industry is operating in an increasingly competitive environment. More and more destinations recognize the potential of tourism as an economic driver and its importance in job creation. Many nations are increasing investments in tourism product development and marketing. Travel consumers have also broadened their horizons, leading to the emergence of new travel destinations. With increased choice, mature destinations like Ontario must invest to build new tourism products or refresh its existing tourism products, and invest more in tourism marketing.

Brand USA now provides the U.S. with a robustly-funded strategic marketing organization. One of its primary target markets is Canada, with emphasis on Ontario. Brand USA's international marketing investments also generate significant competition for our marketing efforts overseas.

Cheaper and more convenient flights have resulted in increased air travel, though airfare to and from Canada remains expensive. It is expected that less Canadians will fly from U.S. airports as the exchange rate makes U.S. tickets more expensive than they were before. Seat capacity from China and Japan to Ontario continues to grow with more flights opening from Shanghai, Beijing, Tokyo and Delhi. New

⁸ Oxford Economics, Outlook Forum presentation, October, 2015

⁹ UNWTO World Tourism Barometer, August 2015

routes to Canada are needed to optimize competitive advantage.

Though the Canada brand remains strong, ranked at second-strongest in the world, Canada ranks 16th in terms of tourism visitation.

Travel Behaviour and Expenditure

While consumers remain committed to travel, indications are that, as was the case in recent years, they are planning on taking fewer or shorter trips, travelling to nearby destinations and cutting back on accommodation, restaurant and recreational spending. Nonetheless, today's value-conscious travellers appear to be willing to pay for unique, authentic experiences.

Travel within Ontario carried the provincial tourism industry over the last couple of years in the face of a major decline in visits from the U.S. A relatively sharp appreciation of the U.S. dollar is expected to reverse this trend, with border crossing into Ontario from the U.S. already showing a growth of 8.9% in the first eleven months of 2015.¹⁰ At the same time, the low Canadian dollar will likely also result in more staycations.

Despite limited direct advertising in the U.S. near markets (border state or short-haul flight), Ontario's standing as a short-trip destination has been stable in the last few years, though at a lower level than previously. In US mid-markets (short-haul flight or one day's drive), Ontario continues to have a low profile as a potential destination; there is limited consumer knowledge about what Ontario has to offer.¹¹

By 2018, American travelers will account for 8% of visitation to Ontario and 16% of visitor expenditures in Ontario.

In 2015 the re-branded Destination Canada (DC), formerly Canadian Tourism Commission

¹⁰ Statistics Canada, International Border Crossings, November 2015.

¹¹ OTMPC continues to explore ways to increase awareness of Ontario as a destination for all priority markets including the U.S.

(CTC), has re-entered the US market and has committed to \$10-million/year for three years for this effort, beginning in 2016. Its digital re-targeting campaign strategy assumes substantial co-investment on the part of provincial partners and the private sector. DC's plan presents a significant opportunity for OTMPC to capitalize on a strong national presence in the U.S. market, but also challenges from a budgetary standpoint as well as partnerships (as DC is looking for external partners to engage directly in its campaigns).

Within Canada, Quebec remains Ontario's largest source market. Quebeckers perceive Ontario as appealing and safe, particularly South Eastern Ontario, Toronto and Niagara Falls. However, Quebeckers find Ontario generally indistinguishable from their own tourism offerings, with which they are more comfortable.

By 2018, overseas source markets will continue to represent a small proportion (2%) of visitation to Ontario, however a more robust 20% of visitor spending, as travelers from these countries stay longer and try to see and do as much as they can during their stay (see charts page 7).

With the growth of the new middle class in emerging markets, there is greater potential for increased visitation. Tapping into new source markets and providing competitive customer service will require enhanced understanding of the different needs and interests of international travellers. OTMPC recognizes the need to establish and promote a strong emotional connection with the "Ontario, Canada" tourism brand.

Social and Cultural Environment

Global and provincial demographic changes also impact travel to Ontario. Within the province, Ontario's population is getting older. Although the empty-nester baby boomer generation has more money and time to travel than previous generations, its net worth has eroded in recent years and many plan on working longer. Younger generations are

emerging with spending power and a high propensity to travel.

Many of Canada's new immigrants are settling across the Greater Toronto Area (GTA). While integrating into an English-speaking culture, many maintain their mother tongue, demonstrated in part by media consumption. Although newcomers tend to travel to their homeland, a desire to know their new surroundings and share them with visiting friends and relatives provides an ongoing opportunity for Ontario tourism. To better serve Ontario's diversity from within the province and a widening array of international markets, future tourism offerings need to be more tailored to different cultural backgrounds, culinary preferences and travel interests.

Technology

Advances in technology and rapid consumer adoption rates offer both an opportunity and a challenge. Easier digital access for consumers to obtain information and plan travel is imperative in a highly competitive marketing environment. Digital "channels" also play an inspirational role through the sharing of consumers' travel experiences during and after their trips.

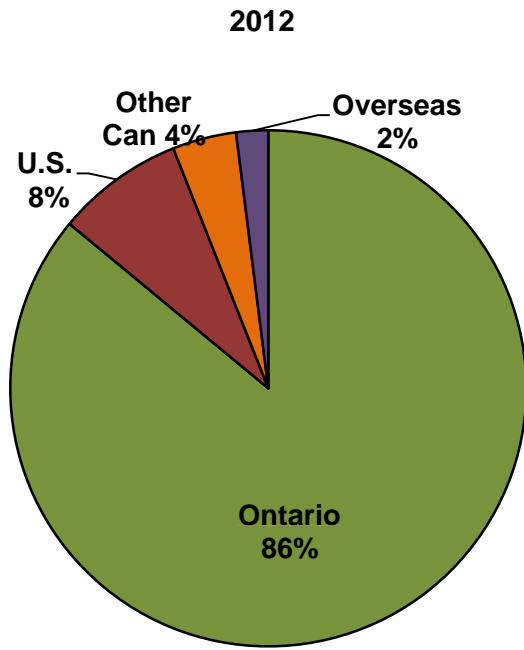
New and emerging consumer communications are changing the digital landscape, including mobile advertising, user-generated content, full-length professional videos, location-based communications, virtual and augmented reality applications. Travel consumers have an ever increasing number of travel planning tools available to them at their fingertips, including Google's recently launched Trip Planning search display. This and similar tools underscore the importance of appropriate level of investment in search engine optimization (SEO).

Marketing approaches are shifting rapidly to content marketing and consumer engagement. OTMPC continues to work with government partners and its information technology (IT) supplier to manage threat risk assessments and privacy risk assessments as part of any changes to existing or new IT builds.

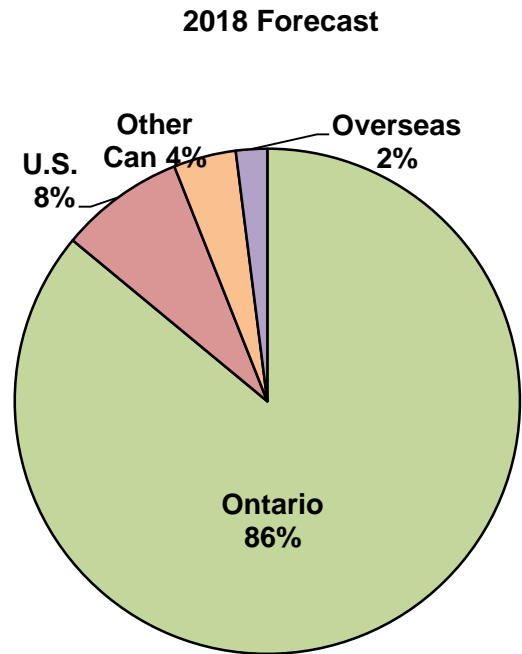
2012 Actual and 2018 Forecast Expenditures

Market	2012	2018F	Growth 2018 - 2012	% Change 2018/2012
	(Millions Dollars)			
Ontario	\$13,809	\$16,516	\$2,707	20%
Other Canada	\$2,262	\$2,933	\$671	30%
US Border	\$1,848	\$2,675	\$828	45%
Other U.S.	\$1,491	\$2,108	\$617	41%
Total Overseas	\$2,912	\$6,224	\$3,312	114%
UK	\$423	\$696	\$273	65%
China	\$354	\$1,324	\$970	274%
Germany	\$175	\$316	\$141	80%
Japan	\$181	\$348	\$167	93%
Brazil	\$165	\$235	\$70	43%
France	\$104	\$191	\$87	83%
India	\$87	\$105	\$18	20%
Mexico	\$73	\$120	\$47	65%
South Korea	\$49	\$162	\$113	233%
Other Overseas	\$1,301	\$2,726	\$1,426	110%
TOTAL	\$22,321	\$30,455	\$8,134	36%

Visits to Ontario

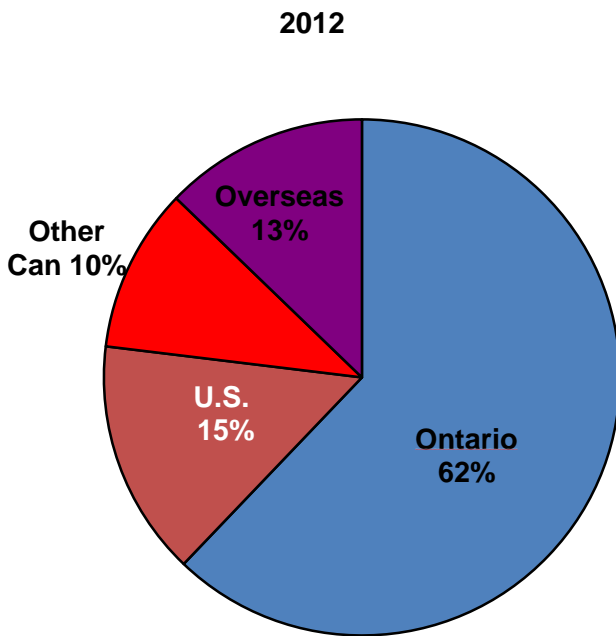


Total Visits
142 million

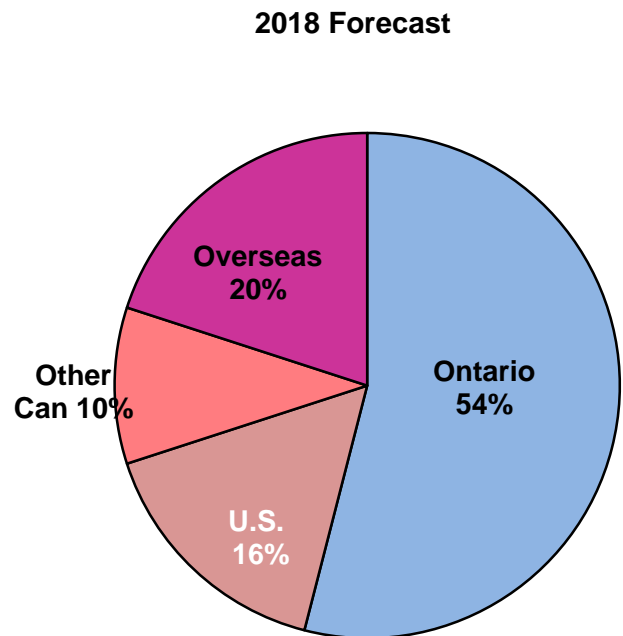


Forecast Visits
154 million

Visitor Expenditures



Visitor Expenditures by Origin
\$22.3 billion



Forecast Visitor Expenditures by Origin
\$30 billion

Source: Statistics Canada, Travel Survey of the Residents of Canada 2012, International Travel Survey 2012, Ontario Ministry of Tourism, Culture and Sport, Ontario Tourism Outlook June 2015

MOVING FORWARD: 2016-17 OTMPC BUSINESS PLAN

The 2016-17 Business Plan marks year three of OTMPC's Strategic Plan 2014-17. The Business Plan is designed to grow visitation and visitor expenditures, aligned to the Strategic Plan's four strategic priorities. Analysis of performance in years one and two in conjunction with market and visitation forecasts will inform any necessary course corrections throughout the year. This information will also inform development of the Business Plan for year four, 2017-18.

RESOURCES NEEDED TO MEET GOALS AND OBJECTIVES

OTMPC augments its government allocation with revenue generated through sales and partnerships (cash, leverage and in-kind) to extend the reach of marketing activities. It's Agency of Record for media buying services balances audience reach against the media buy budget and intended target audience. Traditional media "channels" are mixed with more responsive and cost-effective digital marketing to maximize reach within the projected budget (see enclosed: 2016-17 budget).

With regard to Human Resources, OTMPC continues to improve workplace practices and performance through training. All staff are expected to complete skills training as appropriate. Director level staff have undergone a leadership skills course while employee engagement is measured (bi-annually) and Ontario Public Service Survey results are communicated to program areas. In 2015-16 OTMPC received Excellence Canada level 2 (operating best practices) certification (see below: 4.0 - 4.4)

1. BUILD AND DELIVER THE CASE FOR INVESTMENT

In 2016, with regards to *Building and Delivering the case for Investment*, OTMPC will engage in increased outreach to the Ontario tourism industry, continuing to work with Regional Tourism Organizations (RTOs), Sector Associations, Destination Marketing

Organizations (DMOs), provincial travel information centres, and the tourism industry generally, with increased emphasis on working with tourism operators, particularly receptive/inbound tourism professionals.

1.1 Champion the economic value and impact of tourism industry sectors

OTMPC will continue to actively participate in raising awareness about the economic contribution of tourism visitation and expenditures to Ontario, championing the value and impact of tourism. Key messages will emphasize in-province tourism, as well as visitation and expenditures emanating from the U.S. and European, Asian and South America markets. OTMPC will underscore the collaborative role that the tourism industry plays through partnerships designed to position the provincial brand as a preferred global destination.

1.2 Create and support inter-ministerial synergies

OTMPC will partner and collaborate with other ministries to align tourism to economic priorities, including international investments, transportation, ONroute highway service centres, post-secondary education student recruitment, and aboriginal tourism development. OTMPC will also collaborate within MTCS to support major tourism agency and attraction colleagues such as the Niagara Parks Commission, St. Lawrence Parks Commission, Fort William Historical Park, Ste.-Marie among the Hurons and Discovery Harbour as well as the Ministry of Economic Development, Employment and Infrastructure, the Ministry of Citizenship, Immigration and International Trade and the federal government in delivering marketing and trade activity in key overseas markets.

1.3 Generate an effective communications strategy that celebrates the tangible benefits of investing in building the Ontario tourism brand

OTMPC will develop a comprehensive corporate and continuous communications approach that celebrates the value and impact of tourism to government, industry partners and other stakeholders. Key messages will

include: tourism's current and projected economic impact, OTMPC's marketing and research excellence and the benefits of partnerships. The OTMPC Marketing Strategy, the revitalized Tourism Consumer Information System (TCIS), the tourism partners website and the bi-monthly Passport newsletter will be aligned to broadcast key messages.

1.4 Enhance links to and relationships with business industry leaders (e.g., Chamber of Commerce)

OTMPC will actively engage with the greater Ontario business community to link tourism to the greater Ontario community, including accommodation (hotels, motels and resorts), transportation (airlines, rail and commuter), retail (shopping being a number one activity for tourists), and food and beverage (restaurants, wineries). As well, the Ontario Travel Information Centres (OTICs) will grow links to customer service-oriented tourism welcome centres across the province in part through the 4th Annual OTIC Conference to which travel centres across Ontario and Canada will be invited. OTMPC will partner with Ontario Chambers of Commerce, Festivals and Events Ontario, Attractions Ontario, Resorts Ontario, RTOs, DMOs and tourism industry professionals to optimize mutually-beneficial opportunities.

2. BUILD A POWERFUL BRAND THAT DRIVES RESULTS

In 2016, with regards to *Building a Powerful Brand that Drives Results*, OTMPC will focus on promotional campaigns designed to position Ontario as a preferred global destination, in part through the development of a major brand video piece destined for television and digital distribution. OTMPC's International Marketing division will implement new levels of investment in the three-tiered marketing approach based on the DC evidence-driven model designed to optimize return on investment.

2.1 Create and effectively execute the big brand idea – an emotional campaign to drive tourism visits and spend aligned to the brand strategy

OTMPC invested in international brand research that revealed travellers in the 11

countries in which OTMPC actively markets are generally aware of Niagara Falls and Toronto as icons driving visitation to inform its business-to-business (B2B) and business-to-consumer (B2C) strategies and tactics. The research revealed that international tourists conceive the ideal Ontario vacation as both exciting and relaxing. In 2016-17, OTMPC will continue to focus on bringing the brand essence of "surprising contrast" to life, in order to position Ontario, Canada strongly in the global marketplace. Partners will continue to be encouraged to use the brand toolkit refreshed in the Fall of 2015.

Business-to-Consumer:

To position Ontario as a preferred destination, OTMPC will deploy compelling visuals and powerful language and lead with experiences that resonate with consumers by target market. To serve consumer digital preferences, OTMPC will continue to invest in social media and the revitalized website. Travel content aligned to consumer preferences along the purchase cycle will accelerate decision-making, grow awareness and stimulate greater levels of conversion. The brand campaign builds awareness of Ontario as a tourism destination.

OTMPC will continue to build the Ontario brand with "themed campaigns". Free standing inserts (FSIs), along with digital and social components and a strong media relations/ social influencer push, will be implemented in Ontario and key markets in the U.S. With a focus on continuity planning, these campaigns are designed to support a *continuous presence* in market throughout the year. This multi-channel integrated approach provides an opportunity for industry, sector associations and RTOs to co-invest through advertising partnerships.

With the internet and social media now central to global travel planning and booking across all age and income groups, OTMPC will continue to revitalize TCIS to support the new global brand. Over 80% of Canadian travellers cite websites as their usual travel shopping method, according to PhoCusWright's *Canadian Online Travel Overview*. To meet current and future consumer travel research

and booking preferences, the new TCIS will include trip planning tools, interactive maps, a mobile responsive website and more. Future planned enhancements include: Image Ontario, integrated online magazines and guides to replace tablet apps and flipbooks, a dedicated connection to the Salesforce database, and e-commerce on the partners site with integrated Industry listings from RTO's/DMO's to ontariotravel.net.

OTMPC will continue to focus its digital social media strategy to drive consumer engagement through primary social media channels as guided by the following principle: growing conversations in all OTMPC key markets through the use of a centralized brand voice; assisting with industry alignment for all partnerships (RTOs, DMOs, attractions and others) while focusing on emotional appeal; and use of and alignment of consumer-generated content as the travel inspiration tool and for partner product promotion.

OTMPC's OTICs will actively reinforce the brand strategy through effective personal customer service.

Business-to-Business:

OTMPC's International and Canadian media relations will align with the overall brand strategy to generate positive editorial coverage of Ontario's tourism product in priority markets. Media relations will ultimately provide a consumer-facing, credible third-party endorsement to inform and inspire consumer travel plans. Key opinion leaders in priority markets provincially, nationally and internationally will be engaged, with particular emphasis on the higher-yield markets (tourists with higher average spend per vacation).

OTMPC will continue to work with international and Canadian industry partners to support media and trade through familiarization tours: creating itineraries and arranging for in-kind services by industry partners in a number of sectors - accommodation, transportation, culinary, attractions and others.

OTMPC will continue to focus its digital social media strategy to drive consumer engagement through primary social media channels as

guided by the following principle: growing conversations in all OTMPC key markets through the use of a centralized brand voice; assisting with industry alignment for all partnerships (RTOs, Sector Associations, DMOs, attractions and others) while focusing on emotional appeal; and use and alignment of consumer-generated content as the travel inspiration tool and for partner product promotion.

2.2 Focus on key target markets and their audiences using OTMPC marketing insights

In 2016-17, OTMPC will continue to use its three-tier market prioritization strategy. As part of its planning, OTMPC deployed (along with other variables) DC's Market Investment and Return on Investment Models to formulate market investment levels. The DC model incorporates:

- Market Portfolio Analysis (MPA): Ranks markets against their market potential
- Market Investment Model (MIM): Allocates optimal resource investments by market based on current & future market conditions
- Return on Investment Model (RIM) (extension of the MIM): Re-allocates investment among selected market to maximize returns at a risk tolerance level over a given time horizon

In consideration of the size and value of the U.S. market to Ontario, OTMPC has adjusted the RIM, MIM investment recommendation of 47% U.S. and 53% overseas to 53% U.S. and 47% overseas. (See: OTMPC Proposed Investment 2016-17, page 9)

Investments in Tier 1 markets will focus on brand advertising, DC, travel trade and media relations and include Ontario, Quebec, the U.S. (New York City and Detroit) the U.K. and China. Investments in Tier 2 markets will focus on DC partnerships, travel trade and media relations and include Germany, France, Japan, Brazil and South Korea. Investments in Tier 3 markets will focus on media relations and include India, Mexico and the rest of Canada.

A keen eye will be kept on markets in each category to ensure that adequate energies are being applied to maximize consumer, media and trade activity. In the event that markets show significant positive or negative potential, their tier assignment may change as appropriate, such as Mexico with the potential visa changes.

OTMPC's International and Canada marketing strategies will continue with an integrated paid, owned and earned approach to maximise integration and efficiency. They will also drive leads to the industry through website and social influencers.

One of the objectives going forward will be integrating social media into all activity to optimize marketing efforts, leverage social communication to generate awareness and at the same time to drive consumers and influencers to the website.

International and Canada media relations will strategically generate exposure for Ontario as a travel destination by integrating social and traditional media activities. OTMPC will work with targeted travel and lifestyle media influencers to share Ontario tourism stories, strengthen social engagement with media influencers to grow advocacy, amplify OTMPC's marketing campaigns, share Ontario travel news with media influencers, and leverage media marketplaces and in-market media events to strengthen influencer relationships, and support qualified broadcast, print and online outlets on assignment.

The focus on travel trade activity will be to persuade international trade to expand their business by giving them compelling reasons to choose Ontario; develop new packages and support the marketing of new product to differentiate Ontario; and provide Ontario suppliers with new and more opportunities to extend their marketing efforts globally.

OTMPC will partner strategically with all RTOs, Sector Associations, DMOs and the industry as appropriate to increase visitor spend from international and Canada markets, with international partnership emphasis on RTO2 Niagara, RTO5 Toronto and RTO10 Ottawa,

which are positioned to collaboratively invest. Following the success of Rendez-Vous Canada 2015 in Niagara Falls, OTMPC will leverage the improved branded presence at the trade show for OTMPC and the Ontario suppliers, while working with RTO13 to involve more northern businesses with international trade.

DC will continue to execute its new global content strategy as it evolves into a media organization. It will create and curate compelling content and distribute it through popular digital, mobile and social channels. With U.S. outbound travel at an all-time high, DC's re-entry in the U.S. market with the Connecting America campaign and a Team Canada approach will spend \$22.5M a year (including industry partnerships) with a focus on delivering highly personalized content to a younger audience of 19 million in 13 potential cities. OTMPC hopes to partner with DC in the U.S. but must first resolve privacy issues.

OTMPC will continue to provide opportunities for Ontario travel trade to take their product to market at trade shows and sales missions. The focus will remain product that is export market-ready. Through OTMPC's contacts with industry, RTOs, Sector Associations, and individual operators, OTMPC will continue to educate and provide overseas travel trade and media relations support to close the sale through media and product buyer familiarization trips, and provide advice to Ontario businesses about market readiness.

Business-to-Consumer:

In 2012-13, OTMPC and the provincial RTOs invested in a Consumer Insight Research study, resulting in over 69,000 responses from Ontario, Quebec, Manitoba and 21 states in the northeastern U.S. The research identified 12 distinguishable tourism consumer segments, prioritized specific segments as primary targets for each provincial tourism region, and identified the segments with the most potential for the province as a whole. The detailed segment profiles continue to empower the development of effective and targeted marketing strategies.

In 2016-17, OTMPC will continue to focus North American branding and marketing endeavours to entice four to five priority consumer segments with the greatest promise of increasing visitation and expenditures, in particular, “Knowledge Seekers”, “Up & Coming Explorers”, “Connected Explorers” and “Family Memory Builders”.

Northern Programs:

OTMPC’s 2016-17 campaigns will build upon the updated Northern Ontario Marketing strategy led by OTMPC in collaboration with Tourism Northern Ontario (RTO 13) and Explorers Edge (RTO 12). In partnership, specifically with RTOs 12 and 13, OTMPC will work with regions and communities in the north to promote the North as both a destination and gateway to outdoor, culture and heritage experiences. OTMPC Northern Partnerships team will continue to invest and support Ontario’s tourism industries of fishing, hunting, powersports touring and outdoor adventures.

OTMPC’s 2016-17 northern campaign will maintain a focus on key U.S. and domestic markets while reaching for new consumers in international markets including the U.K., Germany and France. Campaigns will provide consumers with engaging content delivered through digital and social channels as envisioned by the new strategy.

To position Northern Ontario as a unique destination, OTMPC will continue to work in collaboration to develop the iconic Group of Seven cultural tourism experience in Northern Ontario. OTMPC will partner with RTO12 and 13, the National Art Gallery, McMichael Canadian Art Collection, Art Gallery of Ontario, and Agawa Canyon Tour Train, among others.

LGBTQ

OTMPC will continue to use legacy marketing assets targeting the Lesbian, Gay, Bisexual, Transgendered and Queer (LGBTQ) communities attending major LGBTQ conferences and trade fairs.

2.3 Encourage tourism industry to develop content/packages to attract the

international market – ‘Ontario Signature Experiences’

OTMPC will continue to support the Ontario Signature Experiences program, launched in 2015, to foster mutually-beneficial business-to-business (B2B) relations and promotion of iconic tourism experiences that drive visitation. Staff will monitor Signature Experience partners to track that quality is maintained.

2.4 Identify and measure against key performance indicators

OTMPC will measure the success of its endeavours by focusing on a number of specific performance measures: destination awareness and ranking of Ontario as a destination by consumers, advertising return on investment (ROI), and conversion metrics for consumers choosing travel to or within Ontario.

3. DEVELOP AND EXECUTE AN EFFECTIVE PARTNERSHIP STRATEGY

In 2016, with regards to *Developing and Executing an Effective Partnership Strategy*, OTMPC will continue to focus on leveraging collaborations and co-investing with accommodation, airlines, and other transportation partners and developing missions in international countries that expand awareness of Ontario tourism assets beyond Toronto, Ottawa and Niagara Falls. OTMPC will also prioritize collaborations with Ontario’s francophone community through marketing the Circuit Champlain with indigenous peoples, by supporting the Aboriginal Tourism 2020 strategy developed by Great Spirit Circle Trail in consultation with 130 communities across Ontario, with Northern Ontario Tourism and Ontario visual arts galleries, and by supporting international awareness of the Group of Seven.

3.1 Maximize stakeholder investment in OTMPC marketing programs

OTMPC will continue to implement enhanced partnerships with corporate partners, DC, RTOs, DMOs, provincial industry sectors, and tourism operators with an emphasis on expanding private-sector partnerships. OTMPC’s primary goal is to optimize mutually-beneficial participation in provincial, national and international marketing efforts. With a leverage or co-investment approach, OTMPC

continues to engage stakeholders to collaborate in the generation of packages, products and experiences. OTMPC will partner through joint marketing programs with industry and collaborate to generate innovative opportunities for industry engagement. OTMPC will position the agency as a true collaborator, open to ideas that industry believes will further market development, industry economic development, and prosperity.

3.2 Champion the Ontario brand to partners to adopt into their campaigns

OTMPC works with all its stakeholder partners to position Ontario Canada as a preferred local and global tourism destination. To encourage marketing alignment and co-investment, OTMPC will lead international missions that celebrate tourism assets under an Ontario Canada umbrella, and will encourage development and marketing of enticing packages, products and tourism experiences to attract new customers.

The Tourism Industry Partners Program (TIPP) will continue to invest up to 40% of an applicant's out-of-province media buy (to a maximum of \$200,000). Program staff will proactively engage tourism stakeholders to implement marketing campaigns that support OTMPC's priority experiences on ontariotravel.net

The Tourism Event Marketing Program (TEMP) merged with the Celebrate Ontario program in 2015 to streamline the application process for 2016-17 festivals and events. New and existing events may now apply for marketing funding through the Celebrate Ontario 2016 program. The newly combined program will be administered by MTCS and will continue to strengthen Ontario's tourism offerings through closely aligned and focused programming and marketing support. OTMPC will lend support to MTCS as needed.

3.3 Secure new external and private sector partners to participate in OTMPC programs

In 2016-17, OTMPC will expand awareness of beneficial marketing opportunities in order to

increase stakeholder participation in effective partnerships. A proactive approach will be implemented that communicates the benefits of partner engagement and enhances the reputation of OTMPC as a high-performing tourism marketer. OTMPC will endeavour to work with new corporate prospects with emphasis on the accommodation, sports, and transportation sectors in order to:

- Maximize stakeholder investment in OTMPC's marketing programs
- Champion the Ontario brand to partners to adopt into their marketing campaigns
- Secure new external and private-sector partners to participate in OTMPC's programs
- Leverage the reputation of the Ontario Canada brand.

OTMPC will also develop new tourism marketing partnerships aligned to themed campaigns, extend market reach and generate revenues. OTMPC partnership staff will collaborate with RTOs, sector associations, DMOs and industry colleagues to build and grow ongoing partnerships that are mutually beneficial.

The province's 11 OTICs are key players in the development of ongoing partnerships with both tourism consumers and industry stakeholders. Travel centres create a positive first impression for visitors and provide an essential link between the consumer and the tourism industry. In August 2014, OTMPC relocated its Toronto OTIC from Atrium on Bay to the revitalized Union Station. The Union Station location puts travel information services within reach of 30 million travellers a year. The OTICs will continue to partner with Ontario Parks. The OTICs will continue partnerships with RTOs to sell tourism experiences and offer onsite advertising opportunities to stakeholders. The centres will continue to provide customized in-person information and advice on where to go and what to see and do with a view to extending visitor stay. OTMPC will continue to work in partnership with the Ministry of Transportation (MTO) to improve travel information services as part of the reconstruction of 400-series highway

ONroute service centres, providing content for electronic travel information kiosks.

2016 will be the third year that the OTIC Conference will extend invitations to municipal regional and provincial travel information delegates with the goal to continue to grow the conference and align tourism product knowledge, and discuss trends and best practices.

3.4 Measure and track brand alignment and partner investments

OTMPC will continue to encourage partnerships that provide direct co-investment and/or leverage in-kind investment from industry, and will work to optimize public/private-sector resources to effectively and efficiently market Ontario as a year-round destination. OTMPC will ensure its partnering opportunities and offers reflect the needs of industry stakeholders and target consumer segments.

OTMPC will continue to report performance results at a program level as well as rolled up for quarterly review at OTMPC Board of Directors meetings, recognizing that revenues from digital partnership sales are expected to be lower than print sales.

4. EMBRACE ORGANIZATIONAL INNOVATION AND EFFECTIVENESS

In 2016, with regards to *Embracing Organizational Innovation and Effectiveness*, OTMPC will focus on ongoing training for staff in leadership, communications and product knowledge. Following a five-module training course provided to management leaders and 22 'informal leaders', OTMPC will engage in implementation of the learnings from this course to enhance organizational culture, continuing the move away from a hierarchical approach to a clan and adhocracy or creative innovation approach, following the 2014 staff assessment based on Cameron and Quinn's *Diagnosing and Changing Organizational Culture*.

4.1 Actively participate to strengthen strategic relationships that champion and

promote tourism's value and economic impact

BOARD:

The OTMPC Board of Directors meets four times a year to provide advice, strategic direction and oversight related to agency activities. The Board will also endeavour to be represented at various industry events to demonstrate member support for the Ontario tourism industry, and engage in championing tourism's importance to the Ontario economy. As well, OTMPC's Senior Management Team and staff will continue to build government and industry links and develop partnerships to strengthen relationships.

The Board of Directors will meet once a year outside of Toronto and where possible will use this as an industry connection activity. In Niagara Falls in May 2015, the Board of Directors met during the Rendez-vous Canada conference to enable Board members to meet industry leaders and attend information sessions. In 2016, one Board meeting will be held in Kingston with a focus on partnership engagement.

COMMITTEES - Inform and advise on tourism's value to the economy

2016 will see a number of new committee members specifically for the Sector Advisory Committee, as exiting appointments expire and new members are recruited. OTMPC will engage its RTO Advisory Committee, Sector Advisory Committee, Marketing Metrics Advisory Committee and Northern Tourism Marketing Committee to ensure the agency receives timely input designed to optimize outputs and outcomes from OTMPC investments. OTMPC will engage its committees to share information as well to provide advice related to effective implementation of the agency's vision and mission, and to disseminate communications messages about the importance of tourism to the Ontario economy.

HR STRATEGY

4.2 OTMPC - Foster a culture of leadership, passion and accountability

Throughout 2015, the OTMPC President's Counsel on Innovation and Creativity advised and worked with the management team and external experts on the implementation of four organizational culture priorities (leadership, team development, learning and training, and product development knowledge) and two creativity and innovation priorities (communications and integrated / streamlined / improved systems). Organization-wide learning and development sessions were held to address these priority areas.

Regular team meetings, including a Directors' Table, Leadership Committee, regular All Staff meetings, and ongoing team meetings, continued and strong progress was made towards intra- and inter-team collaboration and information sharing, particularly on partnership outreach and new marketing opportunities

In 2015, OTMPC successfully completed the supplementary requirements for Level 2 certification in the Excellence Canada Quality Program by developing five process maps on procurement and contract management, trade joint marketing agreements, familiarization tours, TEMP/TIPP applications and approvals, and sales solicitation and partnership contracts. Moving forward, OTMPC will complete process maps on other key activities such as financial processes.

In 2014 and early 2015, two assurance audits of the OTMPC's internal control frameworks and compliance with relevant government operating directives and policies (procurement and contract management and travel, meal and hospitality expenses) were completed by the Ontario Internal Audit Division of Treasury Board Secretariat. In response to the auditors' recommendations, OTMPC initiated a number of policy and process improvements and reported on progress to OIAD through "Recommendations Trackers" in June and October 2015. In 2016, OTMPC will continue to implement and reinforce improvement initiatives.

In September 2015, OTMPC increased its FTE (Full Time Equivalent) count by one with the transfer of one FTE (Senior Management

Group (SMG) 2 level) employee from the Pan and Parapan American Games Secretariat. OTMPC re-aligned the organizational structure to support OTMPC's ability to meet its strategic priorities and key deliverables in the face of broader trends within the tourism industry including significant growth in digital marketing, greater emphasis on growing the economy through international visitor expenditures and emerging opportunities to enhance northern tourism assets. The Senior Management Team now includes the President & Chief Executive Officer; Vice President & Chief Marketing Officer; Vice President, Industry Relations and International Marketing; Vice President, Visitor Engagement and Northern Partnerships; and Director, Corporate Services.

OTMPC's commitment to staff learning continued in 2015. Group training and learning initiatives were held on mental health wellness, process mapping, presentation skills, procurement and contract management, performance and talent management, innovation and creativity, and leadership development. Training will continue in 2016 on priority areas including Leadership, Communication, Managing and Mediating Conflict, industry knowledge and on needs identified in Performance Management and Learning Development Plans - first aid training, computer software, systems thinking, language courses, marketing and partnership development skills. In 2016, efforts will continue to support organizational succession planning and preparing employees for advancement within the organization.

4.3 Encourage and reward fact-based decision making

OTMPC will continue to establish and measure key operational and strategic targets using performance measures, market intelligence on domestic and international markets, and market forecasts to ensure its marketing endeavours generate results. Tracking will include brand strength, ad tracking and return on investment, travel trade trained, ad value equivalency, and lead generation among others.

**4.4 Operate with an investment mindset
- be forward looking and find new and
innovative products**

OTMPC will invest its resources and measure its effectiveness continuously within a context of generating increased tourism visitation and expenditure. OTMPC will research national and international tourism agency competitors to discover best practices, and will engage collaboratively with stakeholders to market Ontario, Canada to the world.

PERFORMANCE MEASURES

	2014-15 Actual	2015-16 Goal	2016-17 Goal	2017-18 Goal
Brand Health				
Unaided Destination Awareness - Short Trip				
Ontario	54%	50%	55%	60%
Montreal	26%	n/a	n/a	n/a
US - Near markets	16%	17%	20%	20%
US - Mid market (NYC)	1%	2%	2%	2%
Overall rating of Ontario as a destination (Average Rating)*				
Ontario	8.0	7.9	8.0	8.0
Montreal	6.8	n/a	n/a	n/a
US - Near markets	7.3	7.5	7.5	7.5
US - Mid-market (NYC)	7.2	7.2	7.2	7.2
*Scale 1 to 10				
Marketing Campaign Return on Investment (ROI)				
Ontario	\$18.9:1	\$12.0:1	\$12.0:1	\$12.0:1
US - Near markets	\$4.13:1	\$10.0:1	\$10.0:1	\$10.0:1
TCIS				
Website traffic - # of visits	2,795,706	3.2M	3.2M	3.2M
Lead generation - # of clicks off ontariotravel.net and all verticals to industry plus clicks from direct emails and mobile app	450,270	800K	800K	800K
Call Centre - # of calls	68,286	70K	70K	70K
Live Chat - # of chats	10,382	12K	12K	12K
Mobile				
Discover Ontario mobile app - # of downloads	29,479	32K	32K	32K
Discover Ontario mobile app - # of event views (incl. Events, attractions, lodging, dining & OTICs)	211,916	250K	250K	250K

	2014-15 Actual	2015-16 Goal	2016-17 Goal	2017-18 Goal
Social Media - Consumer Engagement				
Viewership (Clicks & Views)	6,033,634	6.1M	6.1M	6.1M
Community Size (New Fans)	91,213	118K	118K	118K
Community Engagement (Applause, Amplification, Conversion)	656,261	700K	700K	700K
Reach (Impressions)	18,230,730	20M	20M	20M
Media Relations				
Earned Media/Ad Equivalency - North America and Overseas	\$85.2M	\$68.0M	\$60.0M	\$60.0M
Leisure Trade				
# of Leisure Trade trained - North America and Overseas	5,332	2,500	2,500	2,500

Industry Partnerships				
	2014-15 Actual	2015-16 Goal	2016-17 Goal	2017-18 Goal
Cash	\$3.0M	\$2.4M	\$2.4M	\$2.4M
Leverage	\$11.0M	\$8.0M	\$8.0M	\$8.0M
Leverage in-kind	\$2.2M	\$1.0M	\$1.0M	\$1.0M
# of Visitors - OTICs	960K	1.0M	1.0M	1.0M

Operations / Organizational Effectiveness				
	2014-15 Actual	2015-16 Actual	2016-17 Goal	2017-18 Goal
Industry satisfaction with OTMPC programs and services (* measured every 2 years)	*	7.2	*	7.2
Measure degree to which employees feel engaged (* measured every 2 years)	73.2%	*	73.2%	*

DEFINITIONS:

Brand Health

Unaided Destination Awareness – Short Trip (From the Brand and Advertising Tracking Study: When you think of taking a short getaway trip of one to three nights away from home, which destination first comes to mind? Where is this destination located? What other destinations, if any, come to mind for a short getaway trip of one to three nights away from home?)

Destination rating (From the Brand and Advertising Tracking Study: On a scale from 1 to 10, where 10 is excellent and 1 is poor, *how would you rate each of the following places as a pleasure travel destination?*)

Marketing Campaign ROI

ROI Summary (From the Brand and Advertising Tracking Study - Return to Sample: $\text{Converted Revenue} / \text{Total Campaign Expenditure} = \text{ROI}$)

TCIS

Website Traffic includes: # of visits to main consumer site + verticals + overseas on ontariotravel.net plus external (U.K., Japan and China)

Lead Generation: # of clicks from website to industry partners from main website, verticals, overseas, direct emails and mobile app

Mobile

Discover Ontario downloads: total combined app downloads to iPhone, iPad, Android and BlackBerry devices via the three corresponding app stores

Discover Ontario event view: total overview page views that include event overviews, dining overviews, lodging overviews and OTIC overviews

Social Media

Consumer engagement is measured by Applause (likes), Amplification (shares), Conversation (comments)

Media Relations

Media relations is measured by ad equivalence at a 1:1 ratio

Leisure Travel Trade

of Trade Trained: # of tour operators and travel sales agents trained by OTMPC either alone or in conjunction with CTC Specialist Training programs

New Product developed: new additional overnight in Ontario, new itinerary / Fly-Drive or new product is developed

Industry Partnerships

Cash – dollar amount received by OTMPC from a partner for participation in OTMPC delivered programs and advertising sales and revenue sales generated at OTICs

Leverage – dollar amount that OTMPC's investment in a partner's program (private and public) triggers in additional investment

Leverage in-kind – the dollar amount that OTMPC partners contributed to partnerships

CORPORATE PROFILE

MANDATE, ORGANIZATION & OPERATING ENVIRONMENT

Overview

OTMPC was established on November 30, 1998 as set out in Ontario Regulation 618/98 under the *Development Corporations Act*. The regulation was amended by O. Reg. 12/04 on February 9, 2004 and by O. Reg. 271/04 on August 27, 2004. OTMPC is classified as a board-governed provincial agency (Operational Service) under the government's Agencies and Appointments Directive.

In Q4 of 2015-16, OTMPC is undergoing a mandatory mandate review. This is part of a review process being undertaken by the government of all board-governed provincial agencies over a seven-year period beginning in 2014-15. OTMPC's review report and any ensuing recommendations to government will be available in Q1 of 2016-17.

Mandate

OTMPC's mandate, as provided for in the regulation, is:

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

The following principles, as stated in the Memorandum of Understanding (MOU) between the Minister and Chair, support the mandate:

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

(d) OTMPC is to become a centre of excellence supporting provincial marketing; and

(e) OTMPC is to engage in partnerships to support the above objectives.

OTMPC's mandate to lead tourism marketing directly supports MTCS's ability to deliver on its mandate to build a strong economy and vibrant communities, attract tourists and contribute to job creation.

Vision

To position Ontario as a preferred global destination.

Mission

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

Governance

OTMPC is governed by a Board of Directors comprised of business leaders who are appointed by the Lieutenant Governor in Council, based on recommendations from the Minister of Tourism, Culture and Sport. The Minister receives advice on Board membership through OTMPC's Governance and Nominations Committee and other interested parties. In 2011-12, through implementation of the recommendations of an organizational assessment, the Board adopted four distinct Board Committees:

Executive Committee

Sets priorities and recommends objectives and strategies to the Board with the assistance of the Human Resources Sub-Committee.

Audit, Finance and Risk Committee

Reviews financial performance and ensures that effective financial reporting processes and internal controls are in place.

Governance and Nominations Committee

Undertakes assessment of Board Directors' skills, succession planning and recruitment for Board and advisory committees.

Committees

The Board relies on input from industry committees reporting through committee chairs. In 2012-13, the OTMPC Board restructured the advisory committees to include:

- an **RTO Advisory Committee** (up to 16 members) that supports the coordination, collaboration and alignment of RTO and OTMPC marketing programs and brand;
- a **Sector Advisory Committee** (up to 19 members) that focuses on tourism experiences as well as brand, core and emerging markets;
- a **Marketing Metrics Advisory Committee** (up to eight members) to ensure appropriate performance measures are in place and reported; and
- a renewed **Northern Tourism Marketing Committee** (up to 17 members) that develops and monitors marketing strategies, tactics and programs for key Northern Ontario markets.

Accountability Relationship

OTMPC is accountable to the Minister, through its Board of Directors and through MTCS's Tourism Agencies Branch, for the execution of its mandate.

The Minister is accountable to the Legislature and Treasury Board/Management Board of Cabinet for OTMPC's fulfilment of its mandate, compliance with government policies and reporting to the Legislature on OTMPC's affairs.

The Board is accountable to the Minister for the performance of OTMPC in fulfilling its mandate and for carrying out the roles and responsibilities assigned to the Board by the regulation, Management Board directives, and the MOU with the Minister.

The President & CEO is accountable to the Board and Deputy Minister for the management of OTMPC and the supervision of staff while fulfilling the roles and responsibilities assigned by the Board, Management Board directives, the regulation and the MOU.

Staff of OTMPC is accountable to the CEO for carrying out their individual roles and responsibilities as assigned through the CEO.

Management of OTMPC is led by Chair Jim Marchbank and President and CEO Ronald Holgerson.

Operating Environment

As an operational service agency of the Province of Ontario, OTMPC operates in accordance with the government's operating directives and broad policy directions and is required to operate in accordance with management principles of the Government of Ontario. These principles include ethical behaviour, accountability, excellence in management, wise and prudent use of public funds, high-quality service to the public, fairness in the marketplace, and transparent and competitive procurement. Additionally, as part of its mandate, OTMPC supports government-wide and MTCS priorities as established by the Government of Ontario. It also supports collaboration and information sharing between the private and public sectors.

Organizational Structure

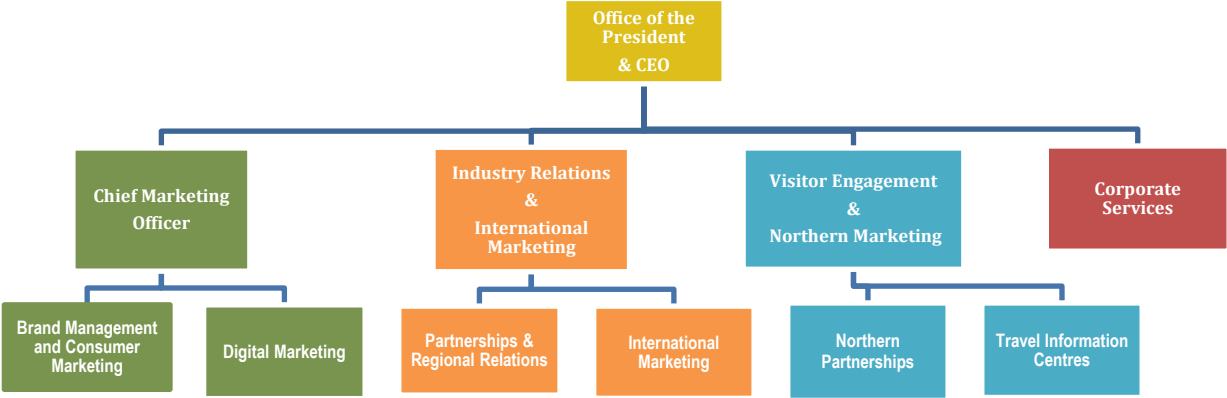
OTMPC employs a total of 89 staff. During the summer months, the OTICs employ 69 students and one seasonal staff. Approximately 12% of the staff is represented by the Association of Management, Administrative and Professional Crown Employees of Ontario (AMAPCEO) and 72% by the Ontario Public Service Employees Union (OPSEU). The remaining 16% of staff is management.

Staffing

Department FTEs	2015-16 Actual	2016-17 Forecast	2017-18 Forecast	2018-19 Forecast
Office of President & CEO	4	4	4	4
Marketing	21	21	21	21
Industry Relations and International Marketing	19	19	19	19
Visitor Engagement and Northern Marketing (including Travel Centres)	38	38	38	38
Corporate Services	7	7	7	7
Total	89	89	89	89

*Note: above FTEs do not include one seasonal staff and approximately 69 students employed at the OTICs. PPAGS Visitor Engagement Team was temporary and disbanded in December 2015.

OTMPC Organizational Chart



Links to the Ministry's Priorities

OTMPC will continue to work with MTCS to help implement key initiatives identified in the current mandate letter from the Premier to the Minister:

Ontario 150 Celebrations

OTMPC will work with the Ministry of Citizenship, Immigration and International Trade (MCIIT) and MTCS to support the Ontario 150 Celebrations where appropriate.

Creating a Healthier Ontario through Sport and Active Recreation

Avid and Outdoor Programs

OTMPC will continue to promote nature and outdoor sports, angling, power sports and other activities which foster active healthy living, and physical activity throughout the year in Ontario.

Building a Dynamic Business Climate RTOs

OTMPC will continue to work with the tourism industry and RTOs to support the sector's economic growth and encourage collaboration among tourism industry partners.

Partnering with other Ministries

OTMPC will continue to partner with other ministries to promote Ontario's global competitiveness and attract international investment (e.g. MTO – ONroute service centres / OTICs, Ministry of Economic Development, Employment and Infrastructure – Northern and Outdoors programs and Partnerships, MCIIT – OTMPC overseas market representatives in key international markets (Germany, U.K., Japan, China and others).

Live Music Strategy

OTMPC will work together with music industry partners, the Ontario Media Development Corporation and the Ontario Arts Council. Strengthening Ontario's live music scene is part of the Ontario government's plan to boost the economy and create jobs. OTMPC will continue to showcase local music talent in campaigns to create a competitive and

productive sector and to showcase Ontario's talent and expertise.

Culture and Tourism Strategies

OTMPC will support, as needed, Ministry staff as the Culture and Tourism divisions develop ministry strategies for the Culture and Tourism sectors.

Promoting Culture, Heritage, and Tourism Agencies and Attractions

Tourism Agencies and Attractions

OTMPC will work with the Government of Ontario's tourism and cultural agencies and attractions to ensure Ontario's cultural and tourism assets are included, where possible, in OTMPC's marketing campaigns to raise their awareness and generate visitation.

Supporting Community Partnerships and Engagement

Aboriginal Communities

OTMPC will continue to build partnerships and engage regions, communities across the province, including Aboriginal communities and Aboriginal organizations to identify new and existing Aboriginal products and promote best in class Aboriginal tourism experiences.

Aboriginal Tourism Ontario (ATO) 2020 Strategy

OTMPC will support, where appropriate, the ATO vision to develop, market and grow Ontario's indigenous tourism industry.

Involvement in Government-Wide Programs

Accessibility Standards for Customer Service

The Accessibility Standards for Customer Service came into effect on January 1, 2008. OTMPC continues to be in compliance with outlined service standards. Going forward, OTMPC will revise documents as its programs and services change.

French Language Services

OTMPC is committed to communicating in both official languages and ensure that marketing

and communications materials are available in both English and French.

OTMPC will employ adaptation or translation of materials for Francophone audiences as appropriate.

Ontario Service Directive

OTMPC will support the Ontario Public Service's (OPS's) commitment to improve the quality of customer service it provides to clients.

Financial Partnerships

OTMPC was established on the principle of working in partnership with the public and private sectors to market Ontario as a travel destination. Through partnerships with industry, OTMPC is able to extend the reach and duration of marketing programs for the benefit of both the industry and the province.

OTMPC partners with industry in the following three ways:

1. OTMPC-Led Marketing Campaigns (cash) Revenue is generated by OTMPC from industry partners for participation in OTMPC-led and delivered programs. Examples include advertising sold in print and digital campaigns. The partnership team will continue to ensure full participation in available paid opportunities and to pursue mid-year revenue generating opportunities. The OTMPC marketing plan has evolved to a partnership model of more digital and social offerings than print

offerings. This shift was in response to current market trends and the interest of OTMPC stakeholders as made clear during partner consultations. While there are as many partnerable opportunities to promote as in previous years, the revenue opportunity is less for social and digital offerings, thus negatively impacting the revenue opportunity from sales overall.

2. Industry-Led Marketing Campaigns (leverage)

OTMPC invests in industry-led projects in which OTMPC provides funding that is instrumental in the initiation of the project or in which OTMPC provides funding into an existing program and benefits from the joint marketing campaign. In 2015-16, OTMPC provided marketing assistance to 13 consortia for their own industry-led campaigns from TIPP, while assisting over 140 festivals and events through TEMP (transferred in 2015 to Celebrate Ontario).

3. Industry Contributions (in-kind)

Industry partners donate their goods and services in the participation of OTMPC-led and delivered programs. For example, OTMPC works with industry partners to support media familiarization tours. Industry provides in-kind services such as accommodations, transportation, meals and attractions admission to visiting media. OTMPC also partners or co-invests with industry on travel trade missions.

CORPORATE COMMUNICATIONS PLAN

Objectives

- To demonstrate OTMPC's role in positioning Ontario as a preferred global destination.
- To communicate OTMPC's marketing and partnership strategies and generate interest in opportunities of collaboration.
- To raise awareness of the value and impact of OTMPC's activities and achievements to industry stakeholders, media and the general public.

Strategic Approach

- A proactive, multimedia communications strategy targeted at internal and external stakeholders that communicates benefits of partner engagement in building the Ontario tourism brand, and enhances the reputation of OTMPC as a leader and effective tourism marketer.

Audiences

Internal

- OTMPC staff, MTCS, other relevant government ministries, etc.
- OTMPC Board of Directors and advisory committee members

External

- Industry partners/individual operators
- RTOs
- DMOs
- Sector associations (i.e., Resorts of Ontario, Attractions Ontario, Festivals & Events Ontario, etc.)
- Tourism Industry Association of Ontario (TIAO)
- Tourism Industry Association of Canada (TIAC)
- DC
- Travel and trade media (i.e., Canadian Travel Press, Marketing Magazine, etc.)
- General media

Key Messages

Build and Deliver the Case for Investment

- By 2017, total visits are forecast to reach 156 million with visitor spend of \$30 billion and generating 360,000 jobs.
- OTMPC works with its partners, including the TIAO, RTOs, DMOs and sector associations to demonstrate the economic value and impact of the tourism industry.
- OTMPC works with government ministries and other government-supported organizations to share in marketing efforts for driving tourism to Ontario. For example, the 2017 Sesquicentennial (Ontario 150) represents an opportunity for multiple areas of collaboration.

Build a Powerful Brand that Drives Results

- Ontario's provincial brand will be positioned as a preferred global destination by aligning efforts with tourism partners and demonstrating a strong presence in the marketplace.
- Ontario will showcase a strong international tourism brand in leading key markets, working with national partner DC, to increase visitation and spend.
- Ontario's tourism industry must successfully compete for the attention of the traveller in a globally-competitive market.
- OTMPC will drive marketing campaigns where key performance indicators are identified and measured.

Develop and Execute an Effective Partnership Strategy

- Partnerships are core to OTMPC's mandate and to supporting its relationships with the tourism industry in order to increase tourist visitation and expenditures in Ontario.
- OTMPC has implemented enhancements to its partnership programs that align with its marketing mandate and strategic priorities.
- OTMPC will consult with industry and develop a partnership strategy with a goal to increase partnership participation in OTMPC programs by traditional and non-traditional partners.

- OTMPC will work with new corporate prospects to develop partnerships with an emphasis on the accommodation, sports, and transportation sectors.

Embrace Organizational Innovation and Effectiveness

- OTMPC establishes clear goals and communicates its results through ongoing news and communications.
- OTMPC provides high-quality service to stakeholders while delivering efficient and effective programs.
- OTMPC embraces market research and continually works to improve the quality of its marketing programs and services.
- OTMPC encourages its Board and Committee members to utilize their role by strengthening relationships with industry, building awareness of OTMPC programs and activities and sharing the value of the tourism economy.

- OTMPC cultivates a strong team through a culture of teamwork, engagement and learning.

Anticipated Outcomes

- Achieve growth and increase prosperity for Ontarians.
- Realize visitor expenditure growth.
- OTMPC demonstrates a leadership role in the areas of brand, marketing activities and programs, and consumer and partner information services.
- Industry supports OTMPC's goals through support of and partnership investment in OTMPC activities.
- OTMPC is recognized by tourism industry partners and other stakeholders as a strong tourism marketer for Ontario provincially, nationally and internationally.

Communications Tactics and Timeline

Activity	Q1 (Apr-June 2016)	Q2 (July-Sept 2016)	Q3 (Oct-Dec 2016)	Q4 (Jan-Mar 2017)
Reports				
Annual Report		X		
Marketing Plan				X
Electronic Communications				
www.tourismpartners.com	X (via Passport) (images database within partners site) (improvements to partner site)			
Ontario Passport e-newsletter	X	X	X	X
E-mail information blasts	As required	As required	As required	As required
Linkedin (posting of Passport, job postings, other relevant information)	X	X	X	X
Events/Meetings				
OTMPC presentations at industry events	X (as required)	X (as required)	X (as required, Ontario Tourism Summit)	X (as required)
OTMPC Events	X (Tourism Week/Ontario Tourism Day, Rendez-vous Canada, OTMPC booths at trade shows)	X (OTMPC booths at trade shows)	X (Travel Services Conference, OTMPC booths at trade shows)	X (OTMPC booths at trade shows)
Media Relations				
News Releases	X (as required, e.g., Tourism Week, TIPP announcements, summer campaign)	X (as required, e.g., fall campaign)	X (as required, e.g., Tourism Marketing Awards, winter campaign)	X (as required, e.g., spring campaign)
Media Inquiries	X (as required)	X (as required)	X (as required)	X (as required)
Award Submissions				
	X Marketing Magazine Awards	X Canadian Tourism Awards, MTCS Applause Awards, Canadian Marketing Awards	X Amethyst Awards (additional as determined)	X (as determined)

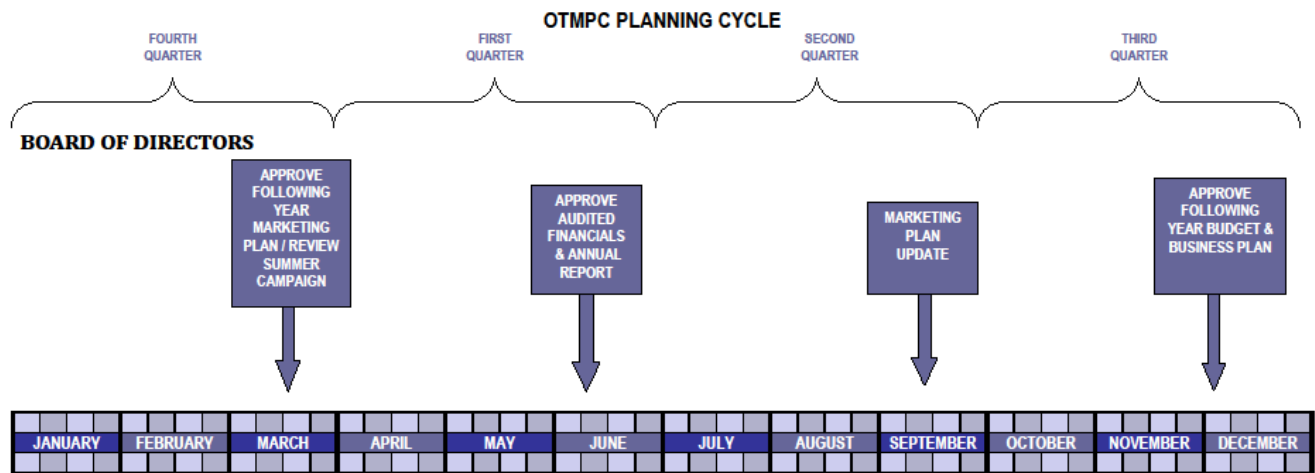
Risk Management 2016-17				
Risk Category	Risk	Mitigation	LIKELIHOOD	IMPACT
1. Financial Risk	<p>Risk: Funding gap to execute effective campaigns due to constrained annual allocation.</p> <p>Risk: Higher media buying and production costs in traditional media channels such as TV is too expensive and Ontario's tourism profile is reduced.</p> <p>Risk: Marketing undertaken under direction of Cabinet Office is not reimbursed.</p>	<p>Mitigation: OTMPC management works to OTMPC works with PHD (its Agency of Record for media buying services) to balance audience reach with scale of media buy budget.</p> <p>Mitigation: OTMPC continues to shift its marketing from traditional media "channels" to more responsive and cost-effective digital marketing. OTMPC is using existing assets where possible.</p> <p>Mitigation: OTMPC works with Cabinet Office to confirm appropriate expenditures. OTMPC seeks reimbursement as early as possible in the fiscal year.</p>	3	3
2. Operational Risk	<p>Risk: The Agency fails to deliver on its mandated programs and services.</p> <p>Risk: Not completing projects to high standards and on time. (e.g. TCIS)</p> <p>Risk: In the event of a prolonged labour disruption or emergency, marketing and partnership activities could be delayed and fewer services will be available to the public.</p>	<p>Mitigation: The Government of Ontario undertakes periodic reviews of government agencies. These reviews analyze the agency role, structure and efficacy of the delivery of mandated programs and services. In 2016, OTMPC will undergo a mandate review.</p> <p>Mitigation: Developed critical paths with partners on all initiatives. Regular meetings with ministry on key initiatives. Project management discipline and executive oversight governance are being applied to the multi-year redevelopment of OTMPC's websites, call centre and databases. TCIS is both on budget and schedule. The final phased release of the redevelopment project is anticipated in Q1 of 2016-17.</p> <p>Mitigation: Business continuity plans for maintaining service have been updated.</p>	3	4

<p>3. Human Resources Risk</p>	<p>Risk: Changing demographics and aging work force. Inability to attract and retain the best-qualified staff if positions (including senior management) are unfilled or contracted temporarily. May result in lower confidence by staff and board.</p>	<p>Mitigation: The Centre for Organizational Excellence (COE) of <i>HROntario</i> provides enterprise support that ensures the Ontario Public Service (OPS) has the right people, in the right place, at the right time to achieve government priorities and ministry business results. Support is achieved through modern management frameworks, methodologies, tools, learning and consulting services to build capacity across the OPS.</p> <p>OTMPC Senior Management Team positions have been filled. Position descriptions have been completed. Improved workplace practices and performance through successful Excellence Canada level 2 (operating best practices) certification. All staff are expected to complete skills training as appropriate. Director level staff have undergone a leadership skills course. Employee engagement measured (bi-annual process). The Ontario Public Service Survey conducted and results have been communicated to program areas.</p>	<p>3</p>	<p>3</p>
<p>4. Information Risk</p>	<p>Risk: Ineffective or inappropriate performance measures can negatively impact program management and results.</p>	<p>Mitigation: Balanced scorecard adopted by the board with targets set for 2015-16 as part of business planning. Advisory committees, including a marketing metrics committee, meet regularly to share information and gauge the effectiveness of campaigns. Staff conduct stakeholder surveys, monitor comments and OTIC consumers are surveyed and responses analyzed throughout the year.</p>	<p>1</p>	<p>1</p>
<p>5. Strategic Risk</p>	<p>Risk: Failure to address the well-funded Brand USA marketing initiative could contribute to the erosion of Ontario as a desirable tourism destination. Failing to meet the expectations of stakeholders will negatively impact OTMPC's reputation and could reduce tourism receipts.</p>	<p>Mitigation: Investments are being made in OTMPC's digital technology, project is on time and on budget, a Toronto OTIC opened in high-traffic Union Station and a new emotionally-appealing Ontario tourism brand has been developed. Discussing potential future joint investment strategies with federal, provincial and territorial partners, specific to the U.S. market.</p>	<p>3</p>	<p>3</p>

<p>6. Stakeholder / Public Opinion Risk</p>	<p>Risk: Falling stakeholder satisfaction and failure to meet the expectations of the public, other governments, ministries, or tourism industry stakeholders will negatively impact government's and OTMPC's reputation.</p>	<p>Mitigation: Stakeholder advisory committees have been implemented to share and align market intelligence. Industry surveyed annually and responses analyzed to address identified issues through OTMPC programming and/or communications activities. Stakeholders notified of changes to operations or programs.</p>	<p>1</p>	<p>3</p>
<p>7. Legal / Compliance Risk</p>	<p>Risk: Unfavourable legal outcomes could result in negative media coverage or monetary obligations. Outstanding legal issues include: creative stock and agency/website name change.</p> <p>Risk: Non-compliance with established policies and directives may result in issues for financial accounting, employee relations, accountability requirements, and may attract negative media attention.</p>	<p>Mitigation: Legal Services Branch has been engaged. Potential financial implications are nominal.</p> <p>Mitigation: On the advice of the Board of Directors, staff engaged OIAD to conduct supplemental audits of policies and procedures to identify potential gaps and propose new procedures/processes where appropriate related to Hospitality, process and contract management. Identified gaps have been addressed.</p>	<p>1</p>	<p>1</p>
<p>8. Technology Risk</p>	<p>Risk: Overreliance on digital marketing to reach consumers and assist with trip planning and closing the sale.</p> <p>Risk: Social media presence exposes OTMPC to negative external comments or inadvertent misuse by staff leading to public embarrassment.</p> <p>Risk: OTMPC's web presence exposes it to cyber-attack and external privacy breach.</p>	<p>Mitigation: Investments are being made in various marketing channels (digital technology, new or refreshed OTICs and a research-based Ontario tourism brand for use in various traditional media channels). Digital marketing is more responsive and cost-effective than traditional media.</p> <p>Mitigation: OTMPC works with MTCS Communications Branch when potential public issues are identified to proactively address developing or potential issues. Clear guidelines are posted for public and staff and social media is monitored on a regular basis and posts that do not meet the guidelines are removed.</p> <p>Mitigation: Any new technology developed is reviewed by provincial government privacy impact specialists; revisions are made based on their recommendation.</p>	<p>3</p>	<p>1</p>

9. Governance Risk	<p>Risk: Failure to meet deadlines and requirements could contravene regulations and directives.</p> <p>Risk: Failure to address the recommendations of external reviews could draw negative attention from stakeholders.</p>	<p>Mitigation: OTMPC works with the ministry to meet timelines and reporting criteria.</p> <p>Mitigation: Mandate Review (2010) recommendations have been implemented/addressed. Committee structure, a balanced scorecard and marketing metrics advisory committee helps evaluate operating effectiveness. Agency management will work with the Ministry to address recommendations coming out of the 2016 Mandate review.</p>	1	3
10. Capital Risk	<p>Risk: Capital upgrades are not undertaken because premises are leased or capital funding is unavailable.</p>	<p>Mitigation: Head office location is new as of 2008. MTO provided two new OTIC locations in 2011. Seven OTICs were closed in 2012. MTCS provided capital in 2013 through 2015 to update OTICs. New Toronto OTIC in Union Station in 2014.</p>	1	2

Likelihood		Impact	
5	Almost certain	5	High - Consequences would threaten the survival or continued effective operation of the activity, or attract adverse media attention, and require top-level management or ministerial intervention.
2	Moderately likely	2	Medium - Consequences would not threaten the activity (i.e. a process, program, project, or initiative) but would mean that the activity could be subject to significant review or changes.
3		3	
4		4	
1	Rare	1	Low - Consequences would threaten the efficiency or effectiveness of some aspect of the program or function but could be dealt with internally.



ADVISORY COMMITTEES

