

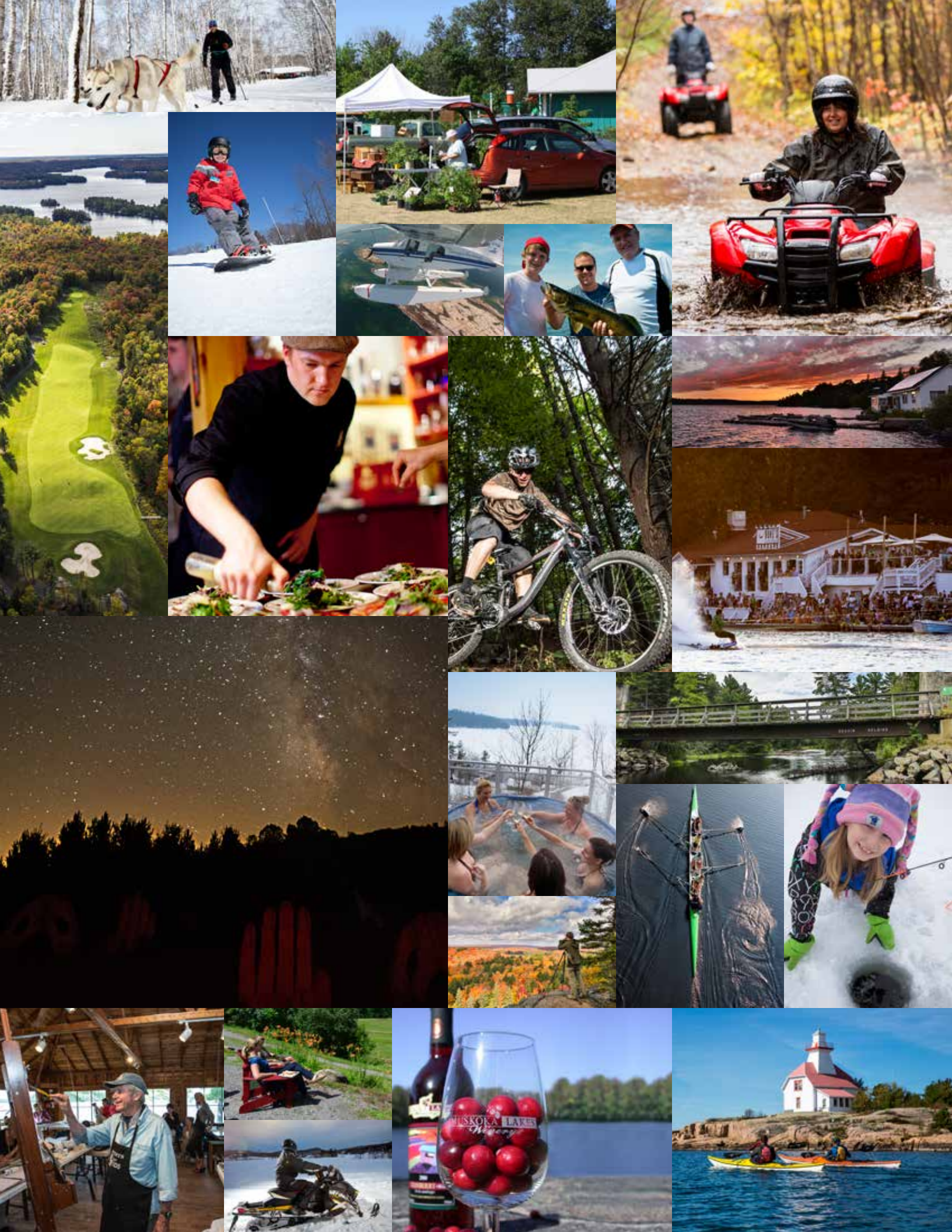


Naturally Adventurous

RTO 12 DESTINATION DEVELOPMENT PLAN

April 1 2014 - March 31 2017





CONTENTS

Executive Summary..... 3

1. Introduction and Background..... 7

2. Tourism Context - Explorers' Edge and Ontario Tourism, 2011..... 8

3. EE Governance..... 10

4. Major Accomplishments: Last 3 Years..... 11

5. Key Learnings: Last 3 Years..... 11

6. EE - Program and Campaign Results 13

7. EE - New Strategic Direction 14

8. EE - Vision, Mission and Mandate 15

9. EE Goals - DDP 2014-2017 16

10. EE Markets - 2011 Visitor Snapshot 18

11. EE Priorities - Next 3 Years..... 20

12. Going Forward - Strategic Recommendations for 2014-2017 23

13. References..... 25

List of Figures and Tables

Figure 1: EE Strategic Approach Going Forward 2014-2017..... 14

Figure 2: Previous Approach - 2011-2013..... 14

Table 1: Explorers' Edge and Ontario Tourism Snapshot, 2010 8

Table 2: Geographic Markets (2011) 18

Table 3: Age..... 18

Table 4: Gender..... 18

Table 5: Quarter Trip Started 18

Table 6: Accommodation Type Used..... 19

Table 7: Activities Participated In 19

Appendix

A. Explorers' Edge Board of Directors..... 27

B. Ontario Tourism: Precise Plans for Growth..... 28

C. Status of 2011-14 Destination Development Plan (DDP) Elements..... 29



EXECUTIVE SUMMARY

Explorers' Edge – RTO 12 DESTINATION DEVELOPMENT PLAN (2014-2017)

Introduction and Background

Explorers' Edge is the Regional Tourism Organization (RTO 12) serving the broad geographic area of Algonquin Park, the Almaguin Highlands, Loring-Restoule, Muskoka and Parry Sound. This **RTO 12 Destination Development Plan (DDP)** highlights the Explorers' Edge strategy for the next three years (2014-2017). The organization has been in start-up mode for the past three years and grown at a phenomenal rate, developing an effective Board structure, operating systems and successful tourism programs. This can only happen with a dedicated Board and staff.

The current DDP 2014-17 builds on the previous *DDP (2011)* which provided a tourism SWOT analysis of the region and incorporated an extensive review of materials, interviews, workshops and focus groups. The current plan was developed from a strategy session with the Board, review of activities over the past three years and examination of existing documentation.

Explorers' Edge has been in start-up mode for the past three years. A private sector Board of Directors and strong staff have placed the organization at the forefront of social marketing, unique and successful marketing program and tracking/measurement of results and ROI. Explorers' Edge is now entering the next phase of its evolution, with a focus on strategic collaborations and leveraging significant partnerships.

Tourism Context

In 2011, Explorers Edge had 4.7 million visits with \$598 in tourism spending. Markets were up slightly over 2010, as were accommodations. Domestic visits are expected to grow at a rate of 2.4% to 2015, with both US and Overseas visits also expected to grow.

Organizational Structure

EE has made great strides in governance during the past three years. Governed by a 15-member private sector Board of Directors representing each of five sub-regions. Seven committees oversee the work of the organization:

1. Executive,
2. Governance,
3. Marketing,
4. Tourism Operator Relations,
5. Community Relations,
6. Transacting, and
7. Research, Tracking Measurement, along with two ad hoc committees: Partnership and Nominating.

In 2013 the Governance Committee reviewed bylaws, policies and procedures as well as the terms of reference for each Committee. In addition, EE underwent a financial audit. The organization is in sound financial health.

Major Accomplishments and Key Learning: Last 3 Years

EE has had several accomplishments during the past three years including: establishing a regional identity (*Explorers' Edge*), successful marketing campaigns (*Fall Blue*, *Winter Turns up the Fun*) and signature programs (*Fun and Fuel*, *Explore the Edge*). In addition, social marketing expertise and programs augment all marketing efforts with contests, stories, coupons – at October 2013 Facebook had 43,000 fans. The website has branded content to capitalize on Search Engine optimization and a 600-member database (Tourism Operator Forum) serves operators. In addition, several marketing tools have been developed, including an image/video bank and downloadable I-Phone App.

EE has also developed a *Tourism Indicator Framework* which will provide a dashboard of brand health, program metrics, visitor exit survey and business index, with first data expected in early 2014. A partnership program provides funds to various operations based on applications and a submitted business plan and a pilot-project Tourism Product Development Fund (established prior to the Partnership Fund) assisted 14 stakeholders develop tourism product.

Key learnings in the last 3 years have helped shape a new strategic direction going forward for EE. These learnings are:

1. Collaboration is key,
2. In-house control is optimal for campaigns (marketing, program delivery),
3. Expert support is required for strategy, media buys, research and training, and
4. The best work considers the visitor first, and
5. Strategy and process are guiding beacons to success.

New Strategic Direction

Based on these key learnings, EE has adopted a “new” strategic direction, that of moving beyond an industry-centric approach to a consumer-centric approach where the consumer is key. At the strategic planning session in October 2013, the Board revised the organization’s Vision, Mission and Mandate based on this new direction. In addition, guiding principles were adopted for moving forward: to leverage strategic collaboration to develop strategies, programs, products and communications that significantly increase the volume of visitors to the Explorers’ Edge region. Branded *Explorers’ Edge* in 2011, the Region’s brand positioning is:

Explorers’ Edge offers “a quintessentially Canadian wilderness experience just 2 hours from the City.”

Goals

Consistent with the new direction, several goals were mapped out under the Ontario Ministry of Tourism, Culture and Sport’s (OMTCS) “five pillars that guide the strategy:

1. Marketing and Promotion Strategy,
2. Product Development and Innovation Strategy,
3. Investment Attraction Strategy,
4. Workforce Development and Training Strategy, and
5. Industry Communication, Liaison and Accountability Strategy.

EE Markets – 2011

Visitation to the region was 4.7 million in 2011, with estimated spending of \$598 million. Of these visits, 96% are from Ontario, with 25% from the Greater Toronto Area (GTA). The average party size is 3 and 3 nights as the average number of overnight visits. About 25% are over 55 and half come during July-September.

EE Strategic Priorities – Next 3 Years

Stemming from the five Pillars specified by the OMTCS and following from the previous plan, this DDP 2014-17 identifies 35 strategic priorities identified as *High*, *Medium* or *Low* by the Board of Directors. The DDP serves as the guiding document for the accompanying *Business and Operational Plan 2014-15* which further elaborates on these priorities and identifies associated tactics, timeframes, responsibilities and measurement considerations.

Broadly, priorities for the next three years include:

1. **Marketing and Promotion Strategy:** continuing to target the GTA and beyond, including niche markets available through strategic collaboration, continuing an active web-based, social media presence, continued tracking, research and establishing a transacting website.
2. **Product Development and Innovation Strategy:** encouraging packaging of weekend or longer events as well as product development workshops. Educating operators regarding Eco-designations within their respective sectors is also identified. Encouraging sports tourism and events in all four seasons and continuing the Partnership Fund are also priorities.
3. **Investment Attraction Strategy:** collaborating to make use of the Northern Ontario incentive grant/loan program and working closely with existing economic development agencies and OMTCS.
4. **Workforce Development and Training Strategy:** working with other agencies to help identify industry needs to encourage and deliver relevant training, continuing to deliver we-based marketing seminars/presentations (e.g. social media).
5. **Industry Communication, Liaison and Accountability Strategy:** moving forward with the Tourism Indicator Framework designed specifically for RTO 12 and industry liaison activities begun in the last two years as well as strengthening communications with industry and developing educational materials informing industry of market research. Engaging operators both through the newly developed Tourism Operator Forum (600 members), newsletters and direct mail was also cited. Collaborating with other RTOs and advocacy are also identified. Determining future membership and funding models are also priorities.



1. Introduction and Background

Established in 2010, Explorers' Edge (EE) is one of 13 Ontario Regional Tourism Organizations (RTO 12) and represents the geographic areas of Algonquin Park, the Almaguin Highlands, Loring-Restoule, Muskoka and Parry Sound. This *Destination Development Plan* (DDP) outlines the strategic approach for EE for the next three years (2014-2017). The Plan provides a brief background and specifies the goals, and strategic activities for the organization, concluding with considerations for moving forward.

Stemming from the five Pillars specified by the Ontario Ministry of Tourism, Culture and Sport (OMTCS) and following from the previous plan, this DDP 2014-17 identifies 35 strategic priorities identified as *High*, *Medium* or *Low* by the Board of Directors. The DDP serves as the guiding document for the accompanying *Business and Operational Plan 2014-15* which further elaborates on these priorities and identifies associated tactics, timeframes, responsibilities and measurement considerations.

DDP priorities were mapped out by the Board of Directors during an Strategy Session held on October 7-8, 2013 at Hidden Valley Resort in Huntsville, Ontario.

EE has been in “start-up” mode for the past three years, with staff for 2.5 years and has set up an effective structure and programs since then. With a forward-thinking, private sector Board of Directors and strong staff, the organization has been at the forefront of social marketing and tourism partnerships. EE is focused on developing marketing programs that produce optimal ROI and measuring their results.

EE is now entering the “next phase” of its evolution, with a focus on strategic collaboration and leveraging significant partnerships.

Several documents were reviewed to: a) set the stage for both the renewed *DDP 2014-17* and the *2014-15 Business and Operational Plan* and, b) gather information on previous activities. Major references for the Plan are noted in the **References** section.

2. Tourism Context

Explorers' Edge and Ontario Tourism, 2010 & 2011

The RTO landscape and a snapshot of RTO 12's position in relation to other Ontario RTOs is shown in **Table 1**. 2010 is the most recent comparative data available at time of press.

Table 1: Explorers' Edge and Ontario Tourism Snapshot, 2010¹

Region	Visits (millions)	Visitor Spending (\$ billions)
RTO All Ontario	103.7	\$17.1 bil.
RTO 1	13.1%	7.5%
RTO 2	9.7%	9.1%
RTO 3	7.1%	3.2%
RTO 4	8.5%	4.8%
RTO 5	18.2%	30.0%
RTO 6	7.3%	3.5%
RTO 7	9.2%	6.8%
RTO 8	4.5%	2.7%
RTO 9	6.2%	4.4%
RTO 10	6.7%	7.7%
RTO 11	4.0%	2.4%
RTO 12	3.7%	3.0%
RTO 13	6.1%	7.3%

The following visitation and spending estimates have been reported for RTO 12:²

Visits and Spending:

2008:	3.5 million visits;	\$662 million spending
2010:	3.8 M	\$513 M
2011:	4.7 M	\$598 M

Businesses:

2008:	1,738 establishments
2010:	1,688 establishments
2011:	Unavailable at time of press

¹ 2010 Data Sources: Statistics Canada, Travel Survey of the Residents of Canada, 2010, International Travel Survey 2010, Ontario Ministry of Tourism, Culture and Sport (Tourism Research Unit). Released Fall 2012.

² Note: 2010 data and 2011 data cannot be directly compared due to changes in survey methodology. 2010 data Sources: as in Footnote #1; 2011 data Sources: analysis based on Statistics Canada micro data which contain anonymous data collected in the Travel Survey of Residents of Canada and the International Travel Survey. Computations prepared by the Ontario Ministry of Tourism and Culture. Released 2013.

2. Tourism Context

Explorers' Edge and Ontario Tourism, 2010 & 2011 (con't)

2011 should be considered as the "base year" from which to calculate the effectiveness of marketing efforts due to changes in data collection methods from 2010 to 2011.

Many observers agree that a goal set by the Ministry Tourism, Culture and Sport (MTCS) of doubling of tourism receipts by 2020 is lofty in this economic climate.

Ontario Tourism Picture and Outlook

- Ontario accommodation occupancy remained flat (60.8%) from Jan-July 2013, up 6% over 2012.³
- International markets were up slightly between Jan-July 2013 (1.9%); USA up, UK up, Germany slightly up.
- The potential for US visitors in the next two years is up 10% (ratio of past 2 years visitation to next 2 years).⁴
- Unprompted awareness of Northern Ontario shows it as a place for: nature and the outdoors (6%), fishing and hunting (4%); most people are unaware of what it has to offer (85%).⁴
- Domestic visits will experience positive growth to 2015 with an average annual growth rate of 2.4%.
- US visits are expected to grow 2013-2015. (Only about 4% of Americans cite familiarity with the EE region (Slide 28).³
- Overseas visits are expected to grow each year, with an average growth rate of 4.7%.

Precise plans for Ontario tourism growth have been outlined by the Ministry and are shown in **Appendix B**.

³ Tourism Snapshot, Canadian Tourism Commission, July 2013.

⁴ Ontario Travel Intentions Survey Presentation, Wave 17, TNS Global, Slides 32 & 43, April 12, 2013.



3. Organizational Structure and EE Governance

The organization has made great strides in governance during the past three years. EE is governed by a 15-member Board of Directors representing each of the five sub-regions.

The Board is unique in that – in early 2011 – a decision was made to limit directorship to private sector tourism operators and the Board is committed to this make-up. Ex-officio members also sit at the table to lend expertise and input. The Board meets monthly and Executive every two weeks. A list of the Board of Directors at October 2013 is provided in **Appendix A**. A lean staff of four (4) conducts the ongoing work of EE.

Seven (7) committees oversee the work of the organization and at October 2013 are as follows:

1. Executive
 2. Governance
 3. Marketing
 4. Tourism Operator Relations
 5. Community Relations
 6. Transacting
 7. Research, Tracking Measurement
- Ad hoc: Partnership and Nominating

Committee responsibilities are briefly noted in **Appendix B**. Committees' Terms of Reference are available on the rto12.ca website. Committee updates are provided at each Board meeting.

In 2013, the Governance Committee reviewed bylaws, policies and procedures as well as the terms of reference for each committee.

4. Major Accomplishments: Last 3 Years

Key accomplishments for Explorers' Edge during the past three years are presented in below.

Key EE Accomplishments/Programs 2011-2013

- **Regional Identity:** Established a branded region "Explorers' Edge", as per the recommendation in the Sorbara Report (2009).
- **Marketing Campaigns:** (2012-Ongoing) *Fall Blue, Winter Turns up the Fun.*
- **Signature Programs:** (2012-Ongoing): *Fun and Fuel, Explore the Edge* (transacting programs).
- **Social Marketing Expertise & Programs:** (2011-Ongoing) supplement marketing – contests, stories, coupons; Facebook (43,000 fans at October 2013); Website (special offers, branded content for improved Search Engine Optimization (SEO), operator database).
- **Tourism Research Indicator Framework:** framework built; initial research being collected. (First results: 2014) Dashboard of brand health; program metrics, visitor exit survey, business index.
- **Partnership Program:** (2012-Ongoing) Funds provided to various operations based on submitted business plan. Must align with strategy: build shoulder season, aim to change perceptions, engage multiple operators, create new audiences. 10 awarded to date.
- **Tourism Product Development Fund** (Pilot Project 2012-13, extended to 2013-14): Established prior to creation of Partnership Fund by MTCS with aim of developing tourism product. 14 awarded.
- **Governance Development & Review:** During 2013, the Governance Committee led a review of bylaws, policies and procedures and committee review.
- **Tourism Operator Engagement:** On-line Tourism Operator Forum: Searchable database with 600 members.
- **Development of Marketing Tools:** Image/Video Bank; Downloadable I-Phone App.

5. Key Learnings: Last 3 Years

Programs, Products, Marketing

1. **Collaboration is Key:** eg. Operator buy-in; OTMPC: \$60k investment, Fall Blue FedNor: \$45k investment, Port Loring Northern OTMPC: Amalguin Highlands, Ride the Edge partnership, Sweater Weather Tour, Stone Skipping Contest.
2. **In-house Control Optimal for Campaigns:** marketing, program delivery.
3. **Expert Support:** Strategy, Media Buys, Research, Training.
4. **Best Work – Consider the Visitor:** Best work produced when the visitor is considered first and foremost. Ask: What will make it easier for the visitor to choose our destination?
5. **Strategy & Process are guiding beacons to ensure the success of the organization.**



6. Program and Campaign Results

EE has seen substantial success in marketing programs (e.g. Fuel and Fun), social marketing and website traffic since its formation. Specific examples of program success are shown below....

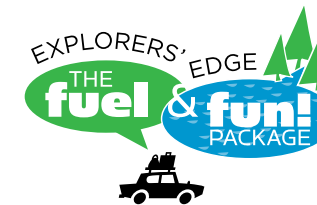
Facebook Fans Year-End 2013: 44,000
Impressions Generated: ?????



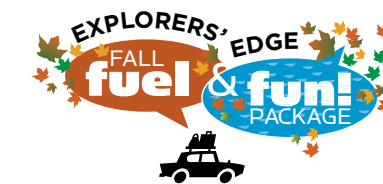
Twitter Followers Year-End 2013: ,2000
Website Visits Year-End 2013: 270K+



Fuel & Fun Spring 2013: 240 registrants



Fuel & Fun Fall 2013: 418 registrants



Explore the Edge
1500 Packages Claimed (5 x \$10):
48% Redemption Rate



Fall Blue Campaign 2013
75K visits to Explorersedge.ca in 6 weeks
???



Winter Turns Up the Fun 2013
????



7. EE – New Strategic Direction

Move beyond an industry-centric approach to **Consumer Centric Approach** where the consumer is Key.

Figure 1: EE Strategic Approach Going Forward – 2014-2017

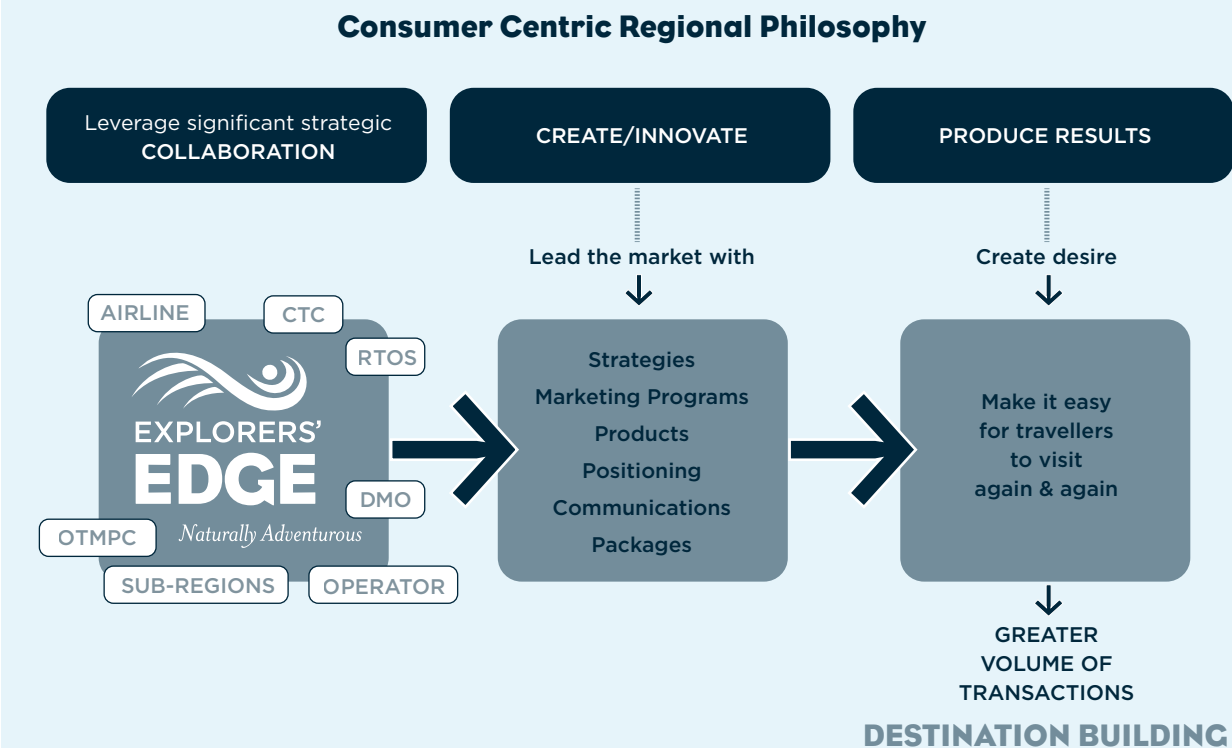
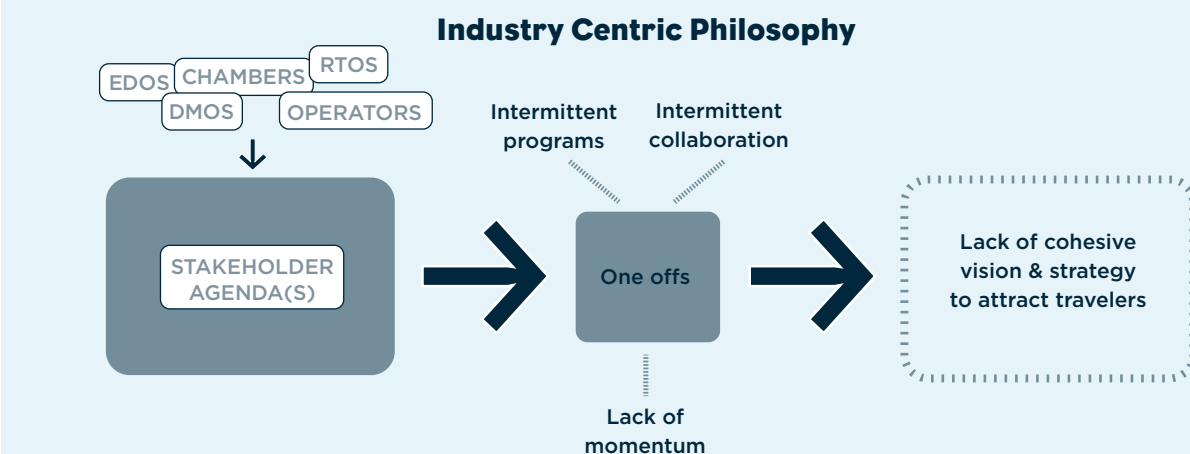


Figure 2: Previous Approach – 2011-2013



8. EE – Vision, Mission and Mandate

The vision, mission and mandate of Explorers' Edge guide the organization. Based on the new strategic direction – a consumer-centric approach, the Board agreed upon a revised Vision, Mission and Mandate during the October 7-8, 2013 Strategy Session.

Explorers' Edge VISION

In three years (2017), EE will be the most popular tourism destination in Ontario.

The associated MISSION

Explorers' Edge is an operator-driven organization whose mission is to develop a profitable and thriving tourism industry in the Region.

Explorers' Edge MANDATE

The Explorers' Edge mandate is to *TIIC*:

- Train
- Innovate
- Ignite, and
- Collaborate with...

... industry stakeholders to help consumers choose our tourism destination and products.



9. EE Guiding Principles and Goals – DDP 2014-2017

Going forward, the Board adopted a guiding principle for the organizations priorities and activities for 2014-17. Operating principles remain the same, with one exception – a focus on four seasons, a shift from the previous emphasis on shoulder seasons.

Guiding Principles – 2014-2017 Strategy

- Leverage strategic collaborations to develop strategies, programs, products and communications that significantly increase the volume of visitors to the Explorers' Edge Region.
- Use strategy and process as guiding beacons to ensure the success of the organization and its initiatives.

Operating Principles

- Change perceptions
- Build new audiences
- Increase four season business
- Leverage significant strategic partnerships
- Engage multiple operators

Overall Goal set by Ministry: **Double tourism revenues by 2020.**



9. EE Guiding Principles and Goals – DDP 2014-2017

The following goals drive the strategic focus for Explorers' Edge for 2014-2017.

1. Marketing and Promotion

- Markets:**
 - Attract international travellers already coming to the GTA/Ontario.
 - Broaden our target markets beyond the GTA.
 - Identify and respond to markets that have the best pay-off (yield), including Niche Markets.
 - Explore competitive “tipping point” programs.
 - Utilize OTMPC Segmentation Research in planning.
- Four-Season Destination:** Focus on developing four-season visits to the Region through strategic marketing initiatives that differentiate each season.
- Technology:** Continue to grow existing and potential market segments using technology.
- Transacting On-line:** Explore on-line transaction capability (ability to reserve, sell and purchase on-line).
- Media Relations:** Establish and implement a media relations strategy and plan.

2. Product Development and Innovation

- Lead the RTOs with innovative product development for measurable results and strategic differentiation.
- Continue to offer product-development workshops.
- Collaborate to assist in development of web-based routes and trails (e.g. boating).

3. Investment Attraction

- Continue to develop and strengthen economic development links.
- Explore strategy for attracting unique investment that will differentiate the region within the province.

4. Workforce Development and Training

- Explore an incentive program to entice workers to work in RTO 12.
- Operator Education:** Continue to assess tourism workforce needs and resources and partner to develop and deliver programs if feasible e.g. social media workshops).

5. Industry Communication, Liaison and Accountability

- Operator Engagement:** Continue to strengthen ties and communication with Industry.
- Engage multiple operators when possible.
- Continue to conduct relevant consumer, market and product development research and measure established programs.
- Continue to develop and strengthen industry and organizational performance measures.
- Build official sub-regional communications strategy and tactics to attract travellers to each sub-region and to make it easy for consumers to choose to visit the sub-regions.

10. EE Markets – 2011 Visitor Snapshot⁵

The key, broad markets for Explorers' Edge are domestic, largely the Greater Toronto Area (GTA) and rest of Ontario. Tables 2-7 provide a snapshot of visitors to EE.

	Visits	% of Total Visits
All Visits	4,769,890	
Canada	4,603,896	96.5%
Ontario	4,565,254	95.7%
Greater Toronto Area	1,172,187	24.6%
York, Durham, Hills of Headwaters	1,145,619	24.0%
Bruce Peninsula, Southern Georgian Bay, Lake Simcoe	510,374	10.7%
Muskoka, Parry Sound, Algonquin Park	424,588	8.9%
USA	103,779	2.2%
Total Overseas (1. Germany, 2. UK, 3. India)	62,216	1.3%

	Person Visits
Under 15 years	8,153
15 - 24 years old	589,159
25 - 34 years old	795,022
35 - 44 years old	957,230
45 - 54 years old	843,618
55 - 64 years old	1,238,084
65+ years old	332,699
Age not stated	5,923

	Person Visits
Male	2,984,941
Female	1,779,026

	Visits	% of Total Visits
Q1 (Jan - Mar)	351,748	7.4%
Q2 (Apr - Jun)	1,246,444	26.1%
Q3 (Jul - Sep)	2,400,432	50.3%
Q4 (Oct - Dec)	771,266	16.2%

		Visits and Spending:	
Average party size	3	2008: 3.5 million visits;	\$662 million spending
Avg # nights of total visits	2	2010: 3.8 M	\$513 M
Avg # nights of overnight visits	3	2011: 4.7 M	\$598 M

⁵ 2011 analysis based on Statistics Canada micro data which contain data collected in the *Travel Survey of Residents of Canada* and the *International Travel Survey*. All computations on these micro data were prepared by the Ontario Ministry of Tourism and Culture. Released 2013.

10. EE Markets – 2011 Visitor Snapshot (con't)

	Visits	% of Total Visits
Roofed commercial	503,056	10.5%
Hotels	203,369	4.3%
Motels	51,421	1.1%
Commercial cottage/cabins	161,295	3.4%
Other roofed commercial	90,097	1.9%
Camping/RV facilities	348,568	7.3%
Private homes/cottages	1,845,990	38.7%
Private homes	603,215	12.6%
Private cottages	1,270,793	26.6%
Other accommodation type	123,115	2.6%
Total	4,697,861	

	Visits	% of Total Visits
Any Outdoor/Sports Activity	2,426,910	66.6%
Boating	1,683,973	46.2%
Fishing	716,899	19.7%
Golfing	282,870	7.8%
Hunting	43,363	1.2%
Downhill Skiing/ Snowboarding	30,347	0.8%
National/Provincial Nature Parks	426,315	11.7%
Festivals/Fairs	207,072	5.7%
Museums/Art Galleries	179,147	4.9%
Cultural Performances	141,921	3.9%
Historic Sites	137,671	3.8%
Sports Events	44,677	1.2%
Casinos	41,003	1.1%
Zoos/Aquariums/Botanical Gardens	23,571	0.6%
Theme Parks	14,185	0.4%
Total	3,642,471	

In addition to the above visitor snapshot, EE conducted brand awareness and brand health research during 2012⁶ and 2013,⁷ respectively. The 2012 research revealed that a solid awareness base was developed in the first year of branding, "Ontario Explorers" have the highest potential for visits and that the regional website plays a key role in vacation planning. The 2013 research showed progress in brand awareness with most metrics unchanged from 2012, not surprising given the brand investment in 2012.

EE also keeps abreast of current Ontario Tourism Marketing Partnership Corporation (OTMPC) research including regional reports⁸ and segmentation research.⁹ "Nature lovers", "up & coming explorers", "pampered relaxers" and "sports lovers" represent the key market segments. The region projects a solid, favourable image of "outdoors and nature" offered year round with satisfaction levels among visitors, value for dollar and likelihood of return are all high. Water-based/beach activities are high on the list for Ontario and GTA visitors and the EE region is viewed as having impressive scenery and landscapes.

⁶ Cloud AdAgents, *Consumer Research*, Sept 25, 2012.

⁷ Cloud Adagents, *Explorers Edge Brand Health Study*, 2013.

⁸ OTMPC *Regional Report - RTO 12*, September 12, 2012.

⁹ OTMPC *RTO 12 Segmentation Presentation*, Feb 4, 2013.

11. EE Strategic Priorities – Next 3 Years

Lead – Collaborate – Innovate – Produce Results

Brand Positioning:

Explorers' Edge offers "a quintessentially Canadian wilderness experience just 2 hours from the City."

Ongoing business priorities are shown in **Table 8**. Strategic priorities for each of the five pillars are shown in **Table 9**.

Table 8: Ongoing Business

Ongoing Business	Strategic Initiatives – April 1 2014-Mar 31 2017
Situation Analysis, Strategic Directions, Critical path	Update annually in Business and Operational Plan
Market/Brand Awareness and Assessment	Continue to use and monitor brand
Competitive Analysis	Continue to monitor competition, trends
Governance	Review succession plan
Collaboration	Leverage significant and strategic collaboration to build significant traveler volume
Consumer Insight	Gather current consumer insight and segmentation research
Administrative Activities, Reporting	Fulfill and communicate performance metrics/measurables as outlined in the MTC Transfer Payment Agreement



11. EE Strategic Priorities – Next 3 Years (con't)

Table 9: EE Strategic Priorities (2014-2017)

Strategic Pillar	Strategies, Initiatives & Actions – April 1 2014-Mar 31 2017	Board Priority (H=High; M=Medium; L=Low)
1. Marketing & Promotion Strategy		
	1. Incorporate the EE brand in all marketing programs and social media programs.	H
	2. Explore: i. markets beyond the GTA, ii. niche markets available through strategic collaboration (e.g. corporate, international, activity-based, incentive travel) .	H
	3. Continue to ensure that campaigns & campaign wraps – are edgy & creative.	H
	4. Continued to develop marketing campaigns (broadcast & some print) aimed at GTA market and beyond; experienced-based campaigns	H
	5. Continue an active web-based, social media presence.	H
	6. Continue brand advertising; track awareness; monitor quarterly reports	H
	7. Continue to undertake region-wide market research.	M
	8. Establish feasibility of a transacting website	M
	9. Participate in selected travel trade and media trade shows.	M
	10. Explore signage options at gateways (and perhaps across Region)	M
	11. Explore opportunities for revenue generation (e.g. logos on advertising).	L
	12. Explore EE Coupon and/or Gift Certificate Program; revisit Air Miles Redemption.	L
2. Product Development & Innovation		
	13. Continue to encourage greater packaging of weekend (or longer events)	H
	14. Encourage operators to take advantage of 'product development workshops' (e.g. social media, experiential)	M
	15. Educate operators how to take advantage of Eco-designations within their respective sectors	L
	16. Develop and promote routes and trails (e.g. culinary, art, cycling, hiking, snowmobiling)	M
	17. Encourage events in all seasons	H
	18. Encourage sports tourism (e.g. triathlons, Winter Games)	M
	19. Continue the Partnership Fund.	H
3. Investment Attraction		
	20. Collaborate to optimize use of the Northern Ontario incentive grant/loan program.	H
	21. Continue to respond to investment overtures as required (working closely with economic development organizations in the RTO area)	M
	22. Continue to liaise closely with existing economic development agencies and Ministry.	M
4. Workforce Development & Training		
	23. Work with other agencies to help identify industry needs and collaborate to encourage and deliver relevant training.	H
	24. Continue with Web-based Marketing Seminars/presentations (e.g. social media)	H
	25. Continue to promote availability and desirability of careers in tourism industry throughout RTO 12. (M)	L
5. Industry Communication, Liaison and Accountability		
	26. Tourism Indicator Framework: continue to develop detailed accountability system using performance measurement metrics specifically tailored to RTO 12.	H
	27. Continue all industry liaison activities begun in Years 2 & 3	H
	28. Develop educational materials informing industry of market research findings.	L
	29. Continued to strengthen communications with industry throughout RTO 12.	H
	30. Continue to engage operators: direct mail campaign, operator forum on RTO12.com	H
	31. Continue to refine operator database.	M
	32. Collaborate with other RTOs (joint marketing; joint product development, other initiatives)	H
	33. Advocacy: continue to represent member concerns to province and other levels of government	L
	34. Determine future membership model for the organization	M
	35. Determine future funding model for Explorers' Edge	L



12. Going Forward – Recommendations for 2014-2017

In addition to the priorities and actions identified by the Board, strategic recommendations for moving are:

1. Partnership and Product Development Funds

Continue with Partnership fund; discontinue Product Development Fund (which was a pilot project) and associated Committee – and amalgamate the two committees.

2. Workforce Development

Move forward with examining incentives to draw employees to the Region. Strongly consider a collaborative strategy with the Province (and perhaps the Canadian Tourism Human Resource Council) to solve the ongoing shortage of employees for many large operators.

3. In-house Development

Develop strategic products and the associated promotional strategy in-house for optimal efficiency and effectiveness.

4. Collaborate to Streamline Messaging and Programs

Determine OTMPC's strategy for promoting the RTOs and how both government agencies can streamline messaging and programs for optimal impact and ROI.

5. Sub-Regional Capacity Building

Have greater involvement in sub-regional capacity building when needed to produce optimal travel to those regions.



13. References

- Cloud AdAgents, Consumer Research, Sept 25, 2012.
- Cloud Adagents, Explorers Edge Brand Health Study, 2013.
- DDP (2011). *RTO 12 Destination Development Plan – Final Report*. TCI Management Consultants, Millier Dickinson Blais, GGA Management Consultants (August).
- Explorers' Edge Business and Operational Plans (2012-13 and 2013-14)*. Tourism Synergy Ltd.
- Explorers Edge Board Minutes, (2012, 2013) www.rto12.ca.
- Explorers Edge Websites (2013). www/explorersedge.ca and rto12.ca.
- Explorers' Edge Quarterly Newsletters*, 2012, 2013.
- EE Brand Health Study 2013*: Cloud (follow-up study conducted online in winter of 2012).
- EE Brand/Awareness Study*, 2012.
- EE Committee Reports*, 2012, 2013. Correspondence.
- EE 2012 Summer Campaign Wrap*.
- EE Executive Summary Year 2 – TPA June 1, 2012, Year 3 – TPA June 1, 2013*.
- FCA Analytics, August 2012.
- EE Executive Director Updates and Presentations – 2012, 2013.
- MTCS Tourism Statistics RTO 12*, 2010, 2011.
- OTMPC Regional Report – RTO 12*, Algonquin Park, Muskoka, Parry Sound and the Almaguin Highlands, Sept 2012.
- OTMPC – Consumer Insight Research – RTO 12 – ExplorersEdge*, Presentation, February 5, 2013.
- Ontario Travel Intentions Survey* Presentation, Wave 17, TNS Global, April 12, 2013.
- Operational Plan*, 2011. Lockhart, Erik, *RTO 12: Operational Planning Session Highlights*, January 5.
- RTO 12 (2010-2011). *Business and Operational Plan*. RTO 12 Post Incorporation Plan, Created October 25, 2010; Updated January 24, 2011.
- Sorbara, Greg (Chair) (2009), *Discovering Ontario: A Report on the Future of Tourism*, Queens Printer for Ontario: The Ontario Competitiveness Study.
- TNS (2011). *Tourism Research 5 Year Synopsis: RTO 12*.
- Tourism Snapshot, Canadian Tourism Commission, July 2013.
- TPA Final Reports, June 2013, June 2012*.
- Tourism Snapshot*, Canadian Tourism Commission, July 2013.



Appendix A

Explorers Edge Board of Directors, Committee Structure and Roles (at October 2013)

Board of Directors

1. **Don MacKay**, Chair, Muskoka Highlands, Bracebridge
2. **Tony Armstrong**, Vice Chair, Back Country Paint Ball, Bracebridge
3. **Andrew Vitch**, Secretary and Treasurer, Sunny Point Resorts, Cottages & Inn, Seguin
4. **Jerry Feltis**, Mill on Main, Rocky Crest Resort, Mactair
5. **Jackie Leung**, Fern Glenn Inn B&B, Emsdale.
6. **Michelle Berry**, Parry Sound KOA Campground, Parry Sound
7. **Andrew Ryeland**, Bear Claw Tours, Seguin
8. **Ken Turner**, Woodland Echoes, Magnetawan
9. **Diane Wiber**, Winding Fences Farm, Utterson
10. **Nicole Saulnier**, Georgian Bay Airways, Parry Sound
11. **John Miller**, Muskoka Steamship & Historical Society, Gravenhurst
12. **Anthony Rizzo**, Doe Lake Campground Rizzort, Katrine
13. **Hillary Chambers**, Sun Dog Gallery, Port Loring

Resource Members

Jim Murphy, Algonquin Park

Laura Hernando, Tourism Industry Advisor, Ministry Tourism, Culture and Sport

Committee Structure and Roles

The priority EE activities are overseen the Executive and by 7 committees as follows:

1. **Governance Committee:** ensures that Board fulfills its responsibilities: policy development, Board nomination process; Board member evaluation; reviews committee structure.
2. **Marketing and Promotion Committee:** solicits input, recommendations, feedback on marketing initiatives; oversee social media, brand awareness, seasonal campaigns.
3. **Tourism Operator Relations Committee:** helps bring together tourism operators to maximize impact of Explorers' Edge programs. Tourism Operators Engagement Strategy, training seminars, operator database, Partnership funds.
4. **Transacting Committee:** solicits input, recommendations, feedback on initiatives implemented to track transactions between consumers and operators (e.g. "tipping point programs" i.e. Fuel and Fun) and website transacting tools.
5. **Research Tracking and Measurement Committee:** advises the Board on research & measurement strategies, initiatives and innovation relevant to Explorers' Edge; oversight of research for the organization and establishment of the tourism indicator framework.
6. **Community Relations Committee:** brings together community tourism stakeholders to share information and provide input and recommendations on Explorers' Edge activities.
7. **Partnership:** vets applications and makes recommendations to the Board on the Partnership Fund.

Appendix B

Ontario Tourism: Precise Plans for Growth¹⁰

- Adopt a more granular targeted marketing approach in terms of both geography and consumer types to achieve more control and better return on investment.
- Invest in the regional brands since they are the manifestations of the range of unique bundled experiences that can be directed to specific consumer segments.
- Then focus on geographic source markets where targeted consumer segments are most likely to be found.
- For Ontario, The Explorer segments, Nature Lovers and Knowledge Seekers should be prioritized as should Sports Lovers and Aces selectively.
- From an OTMPC perspective, consider the regions collectively rather than individually.
- The combination offering the most impact and reach should be the main targets for marketing investment.
- This may mean giving less attention to the immediate promotion of others.
- Ensure = unique/different has a central role in engagement of domestic travellers.
- Here too, leverage the regions as tangible proof points of the diversity of unique bundled experiences.
- Communicate tangible and specific experiential proof points to anchor all regions, Toronto included. Do not assume that the brand conveys the necessary detail.
- Secure commitment and ensure better conversion of interest by:
 - Offering early booking incentives.
 - Using online assets to complete the transaction from discovery through to booking.
- Encourage development and promotion of culinary experiences (especially as an enticement to premium segments and potential US visitors).
- Also consider development of new product offering easy access to unique natural environments.

¹⁰ Ontario *Travel Intentions Survey* Presentation, Wave 17, TNS Global, Slide, 5, April 12, 2013.

Appendix C

Status of 2011-2014 Destination Development Plan Elements

DDP 2011-14 Recommendation	Priority	Status at November 2013
I. Marketing and Promotion Strategy		
1. Creation of a regional identity that is supportive of for RTO 12 businesses	H	Done
2. Undertake region-wide market research, specific to region	M	Done (Brand, Consumer); started Tourism Indicator Framework - posted on website & provided webinars, presentations, web blasts with partners etc.
3. Develop active web-based, social media presence	H	Done and ongoing
4. Investigate desirability of central reservation system (CRS) for RTO 12 businesses	M	Deferred; reexamining in 2014 but not simply a CRS
5. Asset inventory & mapping key attractions and experiences	M	Completed a program of building a data base tourism related business's (assets). Inventory of key attractions and experiences included in sub-regional inventories
6. Photo bank of images (supporting regional identity)	L	Done and ongoing
7. Develop experience-based promotional campaigns	H	Done: Winter, Summer, Fall, 2012; Year-round, 2013; ongoing
8. Broadcast marketing campaign aimed at GTA market	H	Done: Winter, Summer, Fall, 2012; Year-round, 2013; ongoing
9. Participate in selected travel trade promotions	M	FAMS and publicity initiated; ongoing
10. Develop educational materials informing industry of market research findings	L	Operator links and resources on website, RTO.ca
11. Develop attractive and consistent signage across region	H	Not done, exploring links to revised TODS and other options in 2014
12. Ensure that Travel Information Centres promote RTO 12 primarily	M	Done & Ongoing - 2012 completed a promotional program with Ontario Travel Information Centres across the province that also highlighted the RTO specific region
II. Product Development & Innovation Strategy		
13. Encourage greater packaging of weekend (or longer events)	H	Done& ongoing - Workshop and Fuel and Fun (Fall 2012, 2013; Spring 2013)
14. Encourage mentoring throughout region/ 'product development workshops'	L	Done & Ongoing
15. Encourage environmentally responsible operations ('Green Eco' designation)	H	No; encouraging operators to participate in Green/Eco programs in their respective sectors
16. Develop and promote routes and trails (e.g. culinary, art, cycling, hiking, snowmobiling)	H	Done & Ongoing - promotion through I-phone app, newsletter, social media. Developed trails with Park2Park project through Tourism Product Development Fund 2013
17. Encourage events in shoulder seasons	H	Social media around shoulder events
18. Encourage more sports tourism	M	Working with Tri Muskoka and work with the 2014 Ontario Winter Games, also encouraging sports tourism through marketing and social media; ongoing
19. Encourage expansion and upgrading of existing product	L	15 product development programs were supported/funded that encouraged expansion and upgrading - Arrowhead Provincial Park Ice Trail as an example
20. Promote products made in RTO 12 to markets outside the region to help create positive image	M	Done, winter, summer, fall campaigns; ongoing
21. Celebrate operators who are already expanding and developing their product	M	Highlight in newsletters
III. Investment Attraction Strategy		
22. Liaise closely with existing economic development agencies	H	Ongoing - Regular Community Relations Committee Meetings; presentations to various agencies
23. Continue to improve broadband access throughout region	M	No
24. Advocate for improved transportation structure throughout region	H	Written letters
25. Optimize use of northern Ontario incentive grant/loan program	H	Have started the partnership; Applied to FedNor internship; Loring-Restoule capacity building project
26. Examine ways & means to streamline the regulatory process for tourism development	L	OTMPC Advisory Committee, Monthly calls with Regional Tourism Unit, bi-monthly meetings with Provincial Partners
IV. Workforce Development and Training Strategy		
27. Develop workforce training program for (primarily) summer students in industry to ensure common base of knowledge	L	Being worked on - workforce development board of Muskoka Tourism
28. Hold workshops in cultural sensitivity training	M	In progress - collaboration with Gravenhurst Chamber Chinese & LGTB
29. Develop appreciation/awards program to incent workers in industry	L	No
30. Promote availability and desirability of careers in tourism industry throughout RTO 12	M	Yes - Presentations to Georgian College and University of Waterloo, Position on the Georgian College Campus Advisory Committee
31. Develop internship program	M	No
V. Industry Communication, Liaison and Accountability Strategy		
32. Performance management and accountability	H	Yes, have a TPA process Incorporating in projects; Ministry accountability good; Tourism Indicator Framework developed and data being collected 2013-14
33. Communications with industry throughout RTO 12	H	Ten quarterly newsletters (78% open rate)
34. Liaison with other RTOs (joint marketing; joint product development, etc.)	H	Monthly conference call with other RTOs; partnership with RTO 13
35. Advocacy: representing members concerns to province and other levels of government	M	Aware of industry and TIAO issues; Support Letters have been circulated on various issues

