2023 - 2026 Three Year Strategy

April 1, 2023 – March 31, 2026

2023 - 2024 Business and Operational Plan

April 1, 2023 – March 31, 2024

THE GREAT CANADIAN WILDERNESS
JUST NORTH OF TORONTO

Ontario

EXPLORERS EDGE

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Executive Summary

Established in 2010, Explorers' Edge (EE) is one of thirteen Regional Tourism Organizations (RTOs) funded by the Ontario Ministry of Tourism, Culture & Sport. Also known as RTO12, the company serves the geographic areas of Algonquin Park, the Almaguin Highlands, Loring-Restoule, Muskoka, Parry Sound and South Algonquin, Canada. The region is located on the traditional lands and waterways of the Anishinabek, Algonquin, Métis and Mohawk peoples, and is part of the Robinson Huron (1850) and Williams (1923) Treaties territories.

This Business & Operational Plan (BOP23-24) outlines EE's annual work; provides a status of the organization and the regional industry; and identifies specifies goals, activities, timelines, performance measures and budgets for the upcoming year. It was finalized by EE's Directors during a regular meeting of the Board that was held online on January 25, 2023.

This BOP continues work established in the Regenerative Tourism Strategy (see BOP21-22), which positioned EE as a destination development organization within the Canadian tourism industry. It also marks a post-pandemic return to establishing longer-term objectives. In the form of an internal process rather than a set strategy, and referred to internally as the **"T3Y Blueprint"**, this approach will guide the expanding EE team as they develop the organization and its programs over the period from 2023-2026. Annual BOPs for each fiscal year contained within that time frame will build upon the previous year's work. **"T3Y"** encompasses the umbrella goals of internal and industry "transformation over three years," and is intended to guide the EE team in its daily work.

Key areas for BOP23-24 include: social enterprise business model development for the new 'regenerative travel agency' and the catalyst housing project; launch of the Regional Data Hub online; continuing development of work-integrated training, micro-credentials and tech innovation; development of transportation projects (as per the 2018 Product Development Framework); and revisiting the consumer marketing plan in lieu of Porter Airlines ending service at the Muskoka Airport, due to their own logistics issues. (Learnings from the successful air service project are invaluable for future private/public/non-profit partnerships, the latter of which will likely be required for EE's more ambitious initiatives.) Significant work will be done to update HR practices, in lieu of labour market shifts coming out of the pandemic.

Workforce development will continue to be the priority for the foreseeable future, and the organization's own staff expansion will be important to ensure projects are completed.

As part of its "community-centric approach", EE recently introduced the "Explorers' Edge Co-Creation Lab" (CCL), a dynamic entity that will allow us to engage community members and to solicit the insights of technical experts from outside the industry to build programs. The CCL will help to ensure long term success of and buy-in for multiple projects, while acting as a function of a broader communications effort.

In 2023-2024, EE will continue toward its vision for a resilient and thriving regional tourism economy by keeping regenerative principles at the forefront of all its endeavours. With renewed verve and vigor for our work in post-pandemic world, we will focus all our efforts on the ***transformation of people and place.***

Governance

EE has maintained an open and transparent governance philosophy since its inception and has adopted an unwavering reliance on process to do so. Composition of the Board of Directors is developed using a nomination process, and representation on the Board pertains to geographic, sector, gender, skill set considerations. As priority membership is given to business owners or their key GMs/presidents, the EE Board of Directors has been composed of private sector tourism operator stakeholders since it was created. Ex-Officio members also sit at the table to lend expertise and input. The Board meets bi-monthly, with the Executive conferring weekly.

Board of Directors

The Directors as of January 2023 are as follows:

Hilary Chambers, Chair
Pine Grove Resort, Port Loring, ON

Angela Pollak, Vice Chair
Four Corners Algonquin Camping and Glamping, Whitney, ON

Darren Smith, Treasurer
Lake of Bays Brewing Company, Baysville, ON

Dave Anderson
30,000 Island Cruise Line Inc., Parry Sound, ON

Didier Dolivet
JW Marriott The Rosseau Resort & Spa, Minett, ON

Gabriela Hairabedian
Four Seasons Algonquin Cabins, Madawaska, ON

Jackie Leung
Fern Glenn Inn, Emsdale, ON

James Roberts
Ontario Learn to Kayak Inc. & Harmony Outdoor Inn, Parry Sound, ON

Michael Martyn
Festival of the Sound, Parry Sound, ON

Resource Member(s)

Laura Ross, Regional Development Advisor
Ministry of Tourism, Culture & Sport,
1350 High Falls Road, Bracebridge, ON
laura.ross@ontario.ca, (705) 641-8349

Explorers' Edge is governed by a nine (9) member Board of Directors representing each of the six sub-regions (Algonquin Park, Almaguin Highlands, Loring-Restoule, Muskoka, west Parry Sound district, and South Algonquin).

Three committees report to the Board:

Executive Committee
(works directly with the CEO on regular basis)

Governance Committee

Finance Committee

Ad Hoc Committees can be struck at the discretion of the CEO. Committee Terms of Reference are available on the administrative website, ExplorersEdge.ca. Committee updates are provided at each Board meeting.

In 2017 the Governance Committee reviewed bylaws, policies and procedures as well as the Terms of Reference for each Committee. In addition, Explorers' Edge undergoes annual financial audits as a requirement of its open and transparent philosophy. The organization is in sound financial standing.

In 2022, EE became an incorporated non-profit under the legal entity name of "Explorers' Edge." This is now the consumer-facing name and brand, as "RTO12" is less recognized or understood as an operating name. All governance, policies and programs can be found on the administrative website, ExplorersEdge.ca.

Staffing

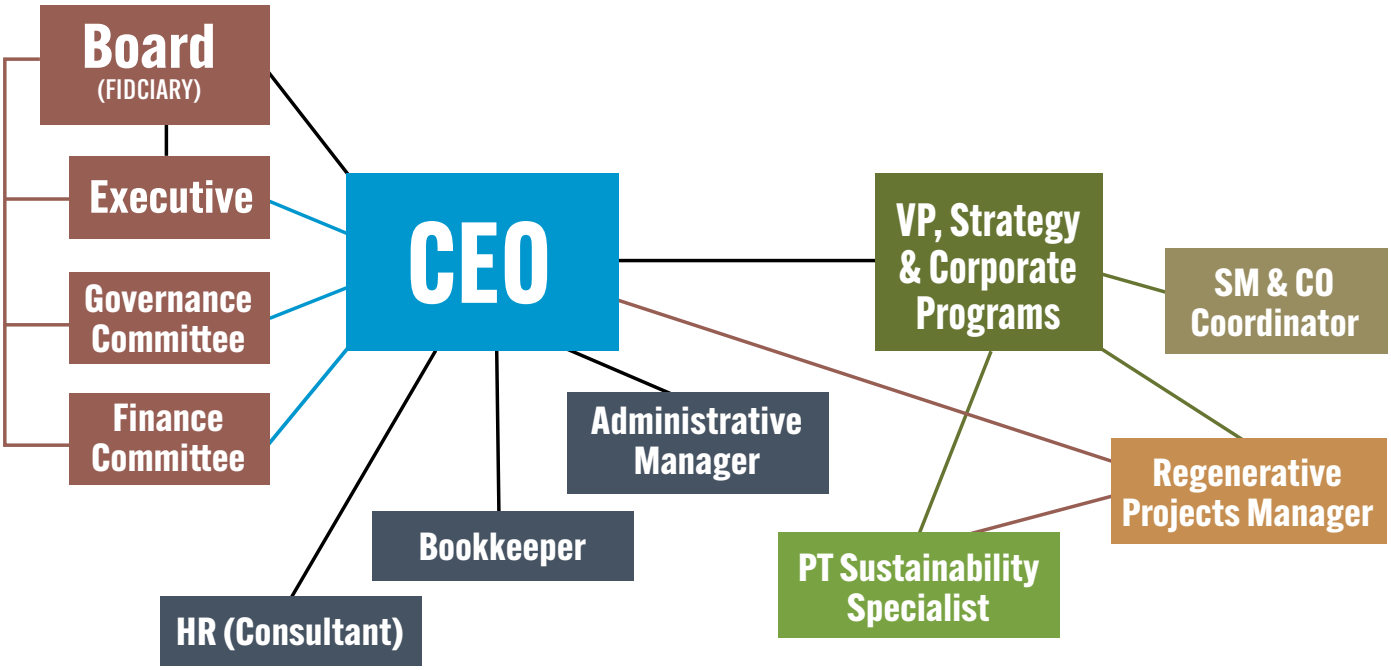
For the past two years, a permanent staff of three (3) has conducted the business of EE. It was a requirement of the foundational Boards that administrative costs pertaining to staff be kept as low as possible. However, with the development of significant regenerative programs over the past year, it is necessary that the roster of staff expands in order to meet ambitious deliverables. For BOP23-24, therefore, a shift towards investing in staff and associated administration costs is prudent and desirable. The Board will invest in the growth of the organization itself, in addition to the wider industry.

In Fiscal 2023-2024, an extensive Human Resources audit to determine scope of work and to make recommendations for optimal program delivery will be completed. The CEO will make adjustments where and if required to align EE with best practices in a changed world.

A new organizational chart, reflecting the anticipated staff growth but also the collaborative and non-linear nature of the organization's work (rather than the traditional hierarchical approach), has been developed. This depicts a more open exchange of ideas and output between teams, while defining the overall management structure. Staff currently use a proprietary, collaborative "Job Mapping" process to ensure each employee both understands the deliverables and has what they need to succeed.

Additionally, in 2022, the position of CEO was created (previously "Executive Director") in order to better reflect the newer social entrepreneurship and revenue generation objectives of the regional destination development organization, pertinent to the Regenerative Tourism Strategy (est. 2021).

Figure 1. 2023-2024 Organizational Chart



Current Staff

CEO: James Murphy

After completing a college diploma in Hotel & Resort Management, James did an undergraduate degree at the University of New Brunswick with a Bachelor of Applied Management in Hospitality & Tourism in 2004. In 2008 James received his Master of Arts, Recreation and Leisure Studies, Tourism Planning and Policy degree from the University of Waterloo. Post-graduation, James served as the general manager of Savour Muskoka, a culinary tourism initiative aimed at bridging the gap between supplier and restaurant chef while at the same time creating a culinary identity for the region of Muskoka and Parry Sound. During this time, he was involved in tourism initiatives on district and provincial levels, and was a Board member with Muskoka Tourism, the Ontario Culinary Tourism Association (OCTA) and the Muskoka Lakes Chamber of Commerce. James has also worked on projects with the Canadian Tourism Commission (now Destination Canada), Canadian Relais & Chateaux Association and Statistics Canada. James joined EE in 2011 as Executive Director, and was promoted to CEO in 2022. He is responsible for stewarding strong governance and administrative procedures, for procuring significant revenue and investment to support EE's Regenerative Tourism Strategy, and for establishing the incorporated non-profit as one of Canada's leading destination development organizations.

Vice President, Strategy & Corporate Programs: Kate Monk

Kate holds a Bachelor of Arts (Hons) from the University of Toronto. She also earned post-graduate certificates in public relations and media copywriting from Humber College in Etobicoke, Ontario. In 2021 she earned her Professional Certificate in Sustainable Tourism from the Global Sustainable Tourism Council, and in 2022, she completed sustainability micro-training at the University of Toronto's Rotman School of Management, and at Cambridge University's Institute for Sustainability Leadership. She also completed the Ready, Set, (Re)Build course from the Ontario Non-Profit Housing Association. Kate joined EE in 2011 and has been responsible for the creation of its innovative strategies and programs.

Administration Manager: Erin Smit

Erin holds a BA in sociology from Laurentian University and a diploma in Hotel & Resort Operations from Georgian College in Barrie. She joined EE under a one-year FedNor contract in 2012, and then joined the team permanently. She is the lead on project management for most undertakings at the company, and for operator outreach. Erin also acts as the organization's office administrator.

Bookkeeper: (TBD)

Regenerative Projects Manager: (TBD)

Social Media & Content Development Coordinato: (TBD)

Part-Time Sustainability Specialist: (TBD)

Explorers' Edge Vision, Mission and Mandate

The impact of Covid-19 on the global tourism industry meant the need to revisit and revise EE's **Vision, Mission and Mandate** statements in Fiscal 2021-2022. The following summarizes the new priorities for the organization from an administrative and governance perspective:

Vision: EE is a Destination Development Organization that leads the Canadian tourism industry in regenerative development, ensuring that the region's communities and tourism stakeholders are resilient and able to thrive long-term.

Mission: EE's mission is to steward the regional tourism industry's recovery, rebuild and renewal by developing innovative regenerative programs to ensure long-term sustainability and success for all stakeholders.

Mandate:

- Steward / Lead
- Research / Innovate
- Recover / Build
- Sustain
- Train
- Collaborate

Explorers' Edge Guiding Principles:

- Develop regenerative strategies, programs and products that are the result of "out of the box" thinking, innovation and strategic collaboration.
- Use strategy, process and "the business of tourism" as guiding beacons to ensure
  the sustainability of the organization, tourism stakeholders and connected communities.
- Prioritize industry, stakeholder and community communications.

Explorers' Edge Operating Principles

- Lead the recovery and rebuild as the regional Destination Development Organization
- Build programs and initiatives using the lens of regenerative business thinking.
- Leverage significant strategic partnerships.
- Engage various direct and indirect stakeholders to ensure wider sustainability and growth.
- Build revenue generation for the long-term sustainability of the organization and the regional industry.

Regional Overview:
March 2022 – December 2022

Provincial Travel Indicators

Prior to the pandemic, visitation and spend results from the Research Unit of the Ministry of Tourism, Culture & Sport showed that domestic travel to the RTO12 region remained strong up until the last year reported (2019):

RTO12 Estimated Visits:

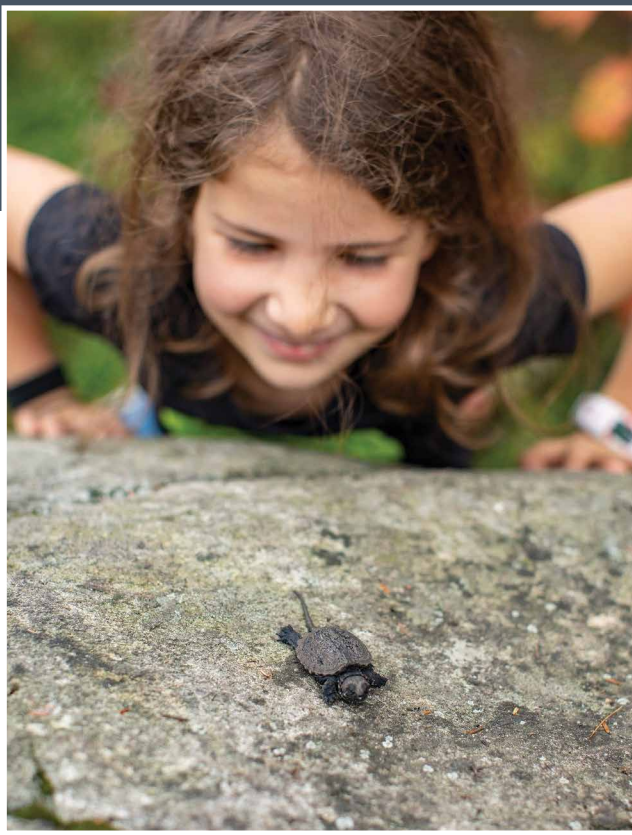
2008: 3.5 million visit
2010: 3.8 million visits
2011: 4.8 million visits
2012: 4.1 million visits
2013: 4.3 million visits
2014: 4.3 million visits
2015: 4.4 million visits
2016: 4.7 million visits
2017: 4.5 million visits
2018: 3.7 million visits
2019: 4.4 million visits

RTO12 Estimated Spending:

2008: $662 million in spending
2010: $513 million in spending
2011: $598 million in spending
2012: $596 million in spending
2013: $614 million in spending
2014: $589 million in spending
2015: $699 million in spending
2016: $778 million in spending
2017: $650 million in spending
2018: $884 million in spending
2019: $840 million in spending

RTO12 Businesses:

2008: 1,738 establishments
2010: 1,688 establishments
2011: 1,666 establishments
2012: 1,757 establishments
2013: 1,795 establishments
2014: 1,905 establishments
2015: 1,921 establishments
2016: 1,931 establishments
2017: 1,958 establishments
2018: 1,965 establishments
2019*: 841 Establishments



**2019 statics did not include "Retail" & "Other Services", which accounted for 1,101 establishments in 2018.*

RTO12 Occupancy Data

Occupancy data for regional accommodations for the twelve months ending in December 2022 showed that this region continued to have a strong performance despite a challenging socio-economic environment (persistent Covid infections, price of gas, cost of living, inflation, etc.).

Figure 2. CRBE Twelve Months Ended December 2022

TRENDS IN THE CANADIAN HOTEL INDUSTRY
National Market Report: A monthly professional publication

CBRE

Report of room operations for RTO 12 and the Province of Ontario

MONTH OF NOVEMBER 2022

	Occupancy Percentage			Average Daily Rate			Revenue Per Available Room		
Location	2022	2021	**Point Change	2022	2021	Variance	2022	2021	Variance
HUNTSVILLE	38.9%	38.1%	0.8	$131.73	$125.59	4.9%	$51.24	$47.84	7.15%
BRACEBRIDGE/GRAVENHURST	49.5%	50.7%	-1.2	$149.96	$134.59	11.4%	$74.18	$68.20	8.8%
RTO 12	38.6%	40.3%	-1.7	$158.21	$143.50	10.3%	$61.11	$57.82	5.7%
ONTARIO	65.5%	53.7%	11.7	$181.55	$136.76	32.7%	$118.83	$73.46	61.8%

**Please note that the variance between current and previous year occupancy is reported as a point change and not as a percentage variance.
SOURCE: CBRE Limited with reproductin and use of informaiton subject to CBRA Disclaimer and Restrictions as detailed at http://www.cbre.ca/en/services/invest-finance-and-value/valuation-and-advisory/hotels#disclaimer

TRENDS IN THE CANADIAN HOTEL INDUSTRY
National Market Report: A monthly professional publication

CBRE

Report of room operations for RTO 12 and the Province of Ontario

ELEVEN MONTHS ENDED NOVEMBER 2022

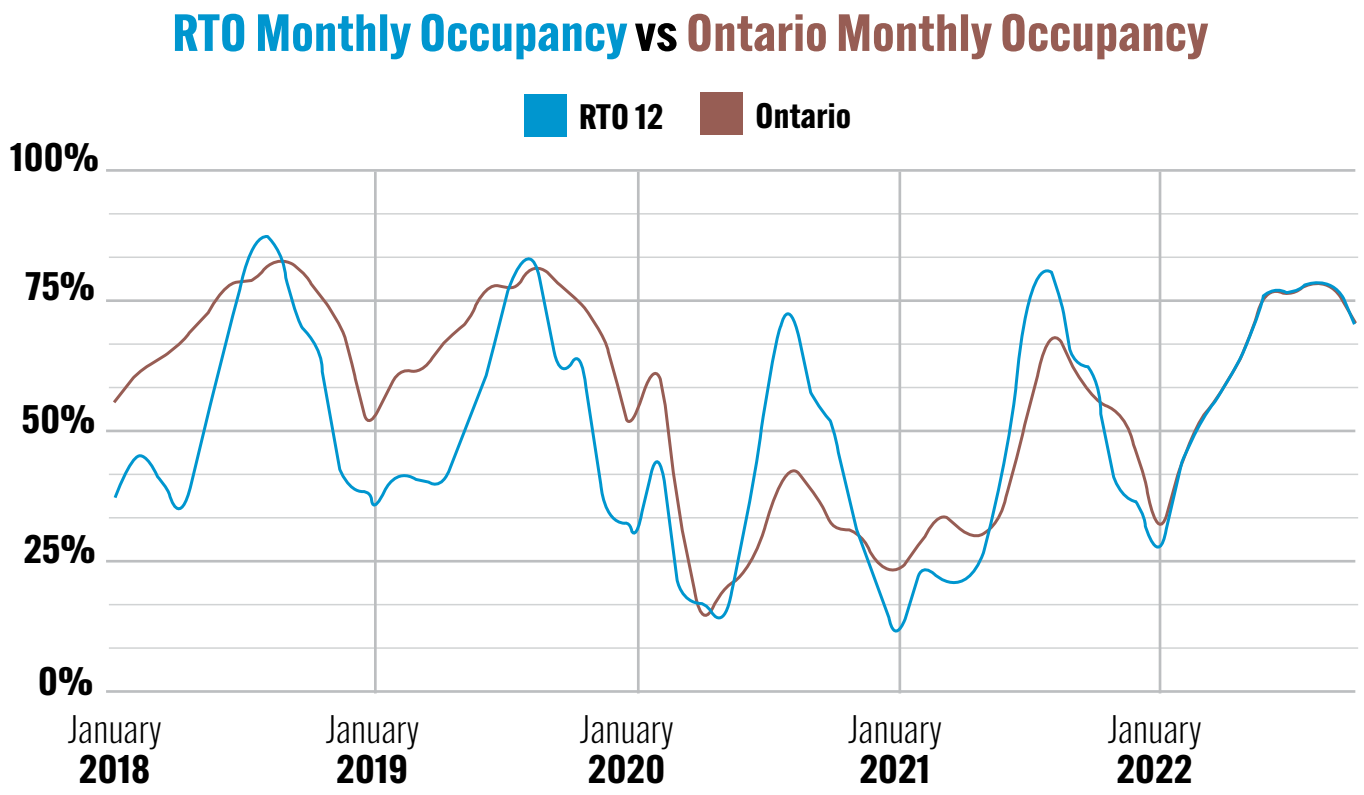
	Occupancy Percentage			Average Daily Rate			Revenue Per Available Room		
Location	2022	2021	**Point Change	2022	2021	Variance	2022	2021	Variance
HUNTSVILLE	58.7%	45.9%	12.8	$193.08	$190.04	1.6%	$113.43	$87.26	30.0%
BRACEBRIDGE/GRAVENHURST	61.7%	49.2%	12.5	$186.82	$175.97	6.2%	$115.28	$86.49	33.3%
RTO 12	55.6%	43.3%	12.3	$219.36	$221.88	-1.1%	$121.86	$96.06	26.9%
ONTARIO	63.7%	44.0%	19.7	$179.87	$128.11	40.4%	$114.56	$56.34	103.3%

**Please note that the variance between current and previous year occupancy is reported as a point change and not as a percentage variance.
SOURCE: CBRE Limited with reproductin and use of informaiton subject to CBRA Disclaimer and Restrictions as detailed at http://www.cbre.ca/en/services/invest-finance-and-value/valuation-and-advisory/hotels#disclaimer

Historical Occupancy Review: January 2018 to October 2022

Since 2018, the region has out-performed the rest of Ontario in July and August. The region under-performed in the shoulder seasons during that period, but that gap has narrowed over the past three years. Historically, EE has focused on building visitation and spend in the shoulder seasons, and this will continue in 2023-2024.

Figure 3. Comparative Monthly Occupancy



Regional Data Hub: Business Confidence Index

As part of bi-annual data collection for the Regional Data Hub (which acquires ongoing and timely intelligence on the overall health of the industry), in late Fall 2022 the 2nd wave of surveying regional tourism operators was completed in order to measure the Business Confidence Index (BCI). Of the 162 surveyed, most are positive about their prospects for the upcoming year, with 72% of respondents falling into our 'Mid and High Confidence' levels – bucking national trends.

A majority of respondents are optimistic that they will be able to meet their business objectives in the coming year (2023).

That said, a lower percentage in this wave expect sales to be higher next year (32% in Fall 2022 versus 54% in Spring 2022). Respondents indicated less concern with meeting staffing needs in the coming year: 27% of respondents said they are very pessimistic that they will be able to properly staff next year versus 45% in the 1st wave.

Inflation preoccupies the Canadian consumer right now, and business operators in the region are likewise attuned. Three quarters of 2nd wave BCI respondents said rising prices are a factor that could limit their ability to achieve their business objectives next year. Not only did a majority point to inflation as a limiting factor, but 87% of this majority said they have a very high level of concern about it.

Lack of employees, increasing labour costs, and inflation are the key concerns of business operators in the region.

Labour Gaps Analysis

As part of the 1st wave of surveying tourism operators in Spring 2022, a Labour Gaps Analysis was undertaken. Results suggest there were approximately 1300 full-time and 4600 part-time positions available across the region at that time.

Note: the 2nd wave of surveying tourism operators was incentivized and participation was significantly higher (162 respondents in Fall 2022 vs. 90 respondents in Spring 2022). Those who participated in the 2nd wave received a package of spending vouchers to distribute to their staff as a performance reward. It is recommended that the Business Confidence Index surveying continue to be incentivized moving forward to ensure healthy participation.

Regional Data Hub: Resident Sentiment

Resident Sentiment is a key measure for EE's Regenerative Tourism Strategy, and the first annual survey of locals was conducted in late Fall 2022. From the **455 residents who responded**, the following intelligence was gleaned:

92% of respondents said that overall tourism is good for their community

91% said local tourism promotion benefits their community economically

80% said the good outweighs the bad when it comes to tourism in the region

Sentiment measures relating to the tangible impact of tourism (overcrowding, noise) show the most pronounced polarity. While 54% of respondents said the region has become overcrowded thanks to tourism, a large percentage, 43% strongly disagreed. Similarly, while 40% of respondents said tourists cause too much noise, 55% strongly disagreed. 82% of respondents said tourism contributes to traffic and parking problems.

There was little variation in sentiment across the four major towns in the region (Huntsville, Gravenhurst, Bracebridge, Parry Sound) with one exception: Parry Sound respondents scored higher on "positive" sentiment measures, and they were more likely to score lower on "negative" sentiment measures

While all ages groups are generally very positive about tourism in the region, the youngest respondents (18-34) gave tourism its highest sentiment ratings.

Resident Sentiment will continue to be measured annually as part of the Regional Data Hub, to ensure one of the region's most important economic sectors retains the support of local communities.

Regional Data Hub: Employee Sentiment

The 1st Employee Sentiment survey was conducted in late Fall 2022. The objective was to gauge respondents' satisfaction in their roles and to identify potential areas of concern that might be addressed to overcome labour shortages. The survey sample included **95 current workers, 75 past workers and 165 potential workers,** and included the following insights:

72% of current workers said they are very satisfied with their job

54% of current workers said they earn a living wage

A majority of current workers (66%) would recommend their employer to others; however, only 46% of current workers would recommend a job in the tourism sector (mostly because they don't consider the sector to provide a living wage)

Good relations with co-workers, schedule flexibility and proximity of employment topped the list of things current and past workers liked MOST about their job. What current and past workers liked LEAST about their job pertained to finances: insufficient wages, the high cost of living, not earning a living wage and the lack of affordable housing.

Less than a quarter of potential worker respondents indicated that they would re-locate for a job in tourism. This particular insight suggests a greater need to *build the workforce from within in the region.* It also coincides with a tourism operator insight, which suggested a main challenge to attracting workers is that there simply "aren't enough people in the region to work in tourism".

It also confirms that, to attract more workers to the regional sector, additional value besides wages must be offered (e.g. housing).

Regional Data Hub: Climate Impact

As part of its Regenerative Tourism Strategy, in 2022 EE launched a pilot project to build the business case for sustainability among tourism operators. This work will continue in the upcoming years as more and more operators are engaged. It is hoped that a collective impact will be tracked as part of the Regional Data Hub, once a bulk of operators has participated and the business case has been finalized. In 2023, a part-time Sustainability Specialist will be hired to assist with the development of the business case, and to provide guidance, if requested, at individual properties.

A watch on year-over-year weather patterns suggests that winter operators in particular are increasingly facing challenges with having enough snowfall and ice formation to offer traditional winter products and experiences. For instance: the Ice Trail at Arrowhead, the first of its kind in Ontario, had its latest-ever opening due to weather in mid-January, 2023. Snowmobile trails remained closed in mid-January also, and snowmobiling as an offering has decreased in popularity because snow (and therefore trail openings) is unreliable in this part of Ontario. In winter, more lakes and rivers now have open water longer, and Georgian Bay's temperatures are rising annually.

A consistent change in winter weather patterns may mean the necessity of adapting offerings to non-weather-dependent products and experiences in order to build the shoulder seasons. (We predict "cold water swimming" will be big!)

Regenerative Review:
The Long-Term Strategy for a Resilient Region

Figure 4. Region-Centric Regenerative Tourism Approach, 2021

Within the circle are the community stakeholders.
Outside the circle are the intended outcomes of the region-centric regenerative approach.

In 2021, EE embarked on an ambitious "Region-Centric Regenerative Tourism Approach" to create innovative solutions for industry sustainability, wider community development, and organizational sustainability (see BOP21-22). The key pillars of this approach are:

1. Work to ensure the economic, social, cultural, and environmental resilience of the region through tourism development.
2. Consider and weigh the desires and needs of all community stakeholders – not just those involved directly in the tourism industry, nor only those in ownership positions.
3. Increase regional self-reliance to solve local challenges and increase revenue generation to stabilize and develop the tourism industry.
4. Seek and implement creative solutions, innovation, and strategic partnerships to solve community development and industry sustainability challenges. Develop timely research and attract digital and tech innovation for the industry.
5. Develop KPIs to reflect improvement of the tourism industry in relation to economic, social, cultural, and environmental objectives (a holistic measurement).
6. Concentrate on developing higher-yield visitation (spend more, stay longer in the region) rather than on mass tourism.
7. Build an extremely robust communications plan to promote the ongoing development of the regional tourism business ecosystem.
8. Position EE as a Destination Development Organization that champions 'the business of tourism as a catalyst for thriving communities.'

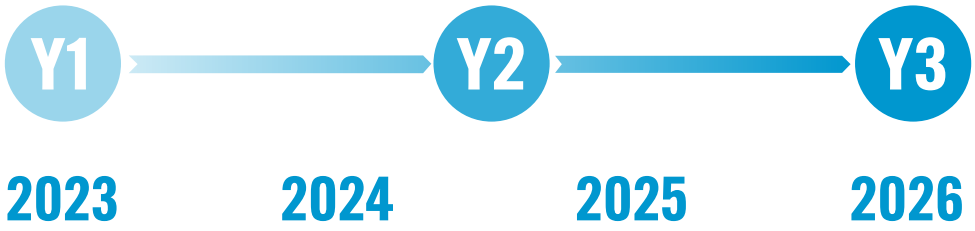
The T3Y Blueprint:
Year-Over-Year Transformation of the RTS

A big learning that came out of the Covid-19 pandemic for the tourism industry is that nothing innovative – or useful - is built in a silo. Likewise for EE's Regenerative Tourism Strategy (BOP21-22), projects that may appear to be stand-alone are more likely to have multiple touch points of intersection – necessary to ensure optimal value creation and positive impact of the whole. Many of the initiatives command singular and significant attention at specific times, but the connection between each requires ongoing regard as well.

In consideration of the upcoming expansion of EE staff, an internal process for moving all the parts forward has been developed to guide everyone for the next few years. Referred to as "Transformation Over 3 Years" – or "T3Y" – it involves setting longer-term goals for individual areas of work that will, collectively, result in the positive transformation of people (visitors, residents, employees), place (ecosystems, communities), and the local tourism economy to create a thriving, resilient, and regenerative destination.

Unlike our annual KPIs and measured objectives, the (internal) T3Y Blueprint highlights the direction every project is ultimately heading towards in order to achieve successful Regenerative Tourism Strategy outcomes. And unlike traditional 5 or 10-Year strategies, this approach also allows for some flexibility in the event that external factors (e.g. Covid restrictions, natural disasters) induce upturned annual plans, as they did in 2020 and 2021. Starting in 2023/2024 ("Y1") and progressing towards 2025/2026 ("Y3"), the T3Y Blueprint will also be used as a tool for employee Job Mapping. (High level goals will be included in this BOP, with more in-depth versions produced by EE staff for use.)

TY3



Priority Projects:
2023-2024

Regional Data Hub (RDH)

The first wave of surveying regional tourism operators took place in April 2022 to determine the:

- Business Confidence Index
- Regional Labour Shortages & Requirements
- The second wave of tourism operator surveying for the Business Confidence Index took place in November 2022.
- A first wave of surveying took place in November 2022 for the following stakeholders:
- Current, Past and Potential Employees
- Residents

Results were still being reviewed at the time of the BOP23-24 being finalized. Next steps involve summarizing the intel for regional stakeholder use (e.g. economic development officers), and then launching a third wave for the Business Confidence Index in Spring 2023. Development of the online dashboard can now begin as well. Ultimately, the RDH will also establish KPIs and track performance of EE's regenerative programs.

Y1

- Benchmark data collection
- Develop and launch online dashboard

Y2

- Ongoing data collection
- Development of KPI's pertinent to EE programs

Y3

- Ongoing data collection
- Impact of Explorers' Edge regenerative programs measured

Workforce Development

Regional Industry Job Board: Ongoing Enhancements

The EE Job Board (launched 2021) was successfully marketed once again, though massive traffic to the job listings did not result in high volumes of hirings for positions posted.

Figure 5. Job Board Analytics

Core	Spend	Impr	Post Engaments	Link Clicks	CPC (link)
RTO Traffic - Job Bank ads - Oct 2021	$5,000	791.9K	15,372	14,444	$0.35
RTO Traffic - Job Bank ads - Mar 2022	$5,000	929.7K	10,489	9,783	$0.51
RTO Traffic - Job Bank ads - May/June 2022	$2,500	446.8K	7,156	6,738	$0.37

EE will continue to promote the Job Board listings (dedicated budget), but will also commence content marketing for potential hires as well. This may involve highlighting individual properties in some cases, and improving the user experience so it is more engaging.

After a review of the Employee Survey that was completed in November 2022, it is likely that targeting will be reconsidered as well (with less than a quarter of people from outside the region indicating they would re-locate for a job in tourism). High school and college/university students will be a key target audience.

- Revise targeting
- Commence lead nurturing content program
- Enhance page to track user/path conversion

- Produce content to build database
- Use database to deploy annual Employee Survey
- Link training programs (micro-credentials

- Job Board is robust, dynamic tool used by the industry to attract and retain workers
- Content included employee authors

The Big Applause Awards:

Recognizing Employee Excellence

To honour current employees, particularly those who remained loyal and worked an extra mile over the course of pandemic restrictions, EE created and hosted the "Big Applause Awards" at the annual Regional Tourism Summit in September 2022.

The program was extremely popular, particularly among employees who are not always in the public view, and also among workers who were keen to nominate their colleagues.

The Big Applause Awards will be adopted as an annual event, with the intention of developing it into an associated program of the work-integrated learning objectives. Efforts will be made to increase regional high school participation as well.

Y1

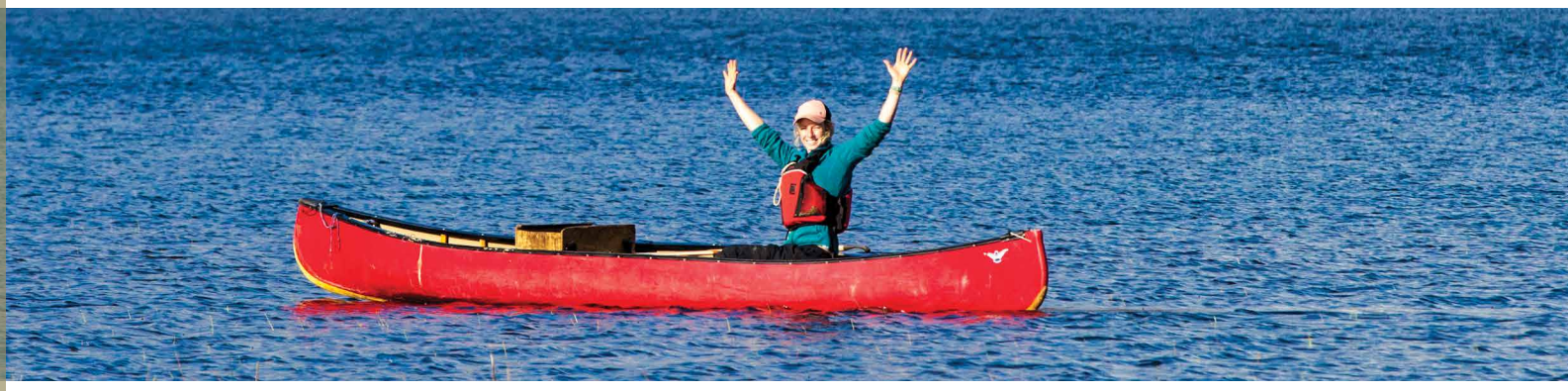
- Assign BAA to dedicated staff member
- 2nd Annual w/more organizing lead time
- Revised Categories
- Develop PR campaign to promote event for more engagement
- Change event timing (test)

Y2

- 3rd Annual
- Event moves around the region
- Develop industry sponsorships
- Develop industry engagement

Y3

- 4th Annual
- Planning for next 3 years
- PR campaign
- Increase industry sponsorships
- Increase federal and provincial govt participation
- Increase job satisfaction with/change negative perceptions of the industry



Micro-Credential Training:

The Rural Tourism Certificate for Job Recruitment

Launched in 2022, to date over 170 people have completed the Rural Tourism Certificate from Explorers' Edge.

It is now a requirement of educational institutes that want to partner with EE on work-integrated programs in the region that students/ attendees complete the micro-credential modules before arrival.

Regional industry-specific training is of the utmost importance for attracting and retaining workforce, and development of all curriculum pertaining to this will be one of two top priorities moving forward; the other being the associated project, catalyst housing.

Y1

- Review Employee Survey for insights into workforce gaps
- Determine segments to target for future training to fill Labour Gaps identified in 1st wave BCI
- Identify work-integrated learning partners (public/private)
- Determine gaps in the training landscape
- Co-Create curriculum with industry, users and training professionals
- Develop tech strategy for delivery and tracking
- Identify additional sectors who may benefit from the work-integrated learning model (e.g. PSWs)
- Develop KPIs

Y2

- Produce training content to align with objectives of the "catalyst housing" project
- Benchmark performance (KPIs)
- Launch training recruitment and program delivery (pilot)
- Develop tech for delivery and tracking
- Co-create with stakeholders

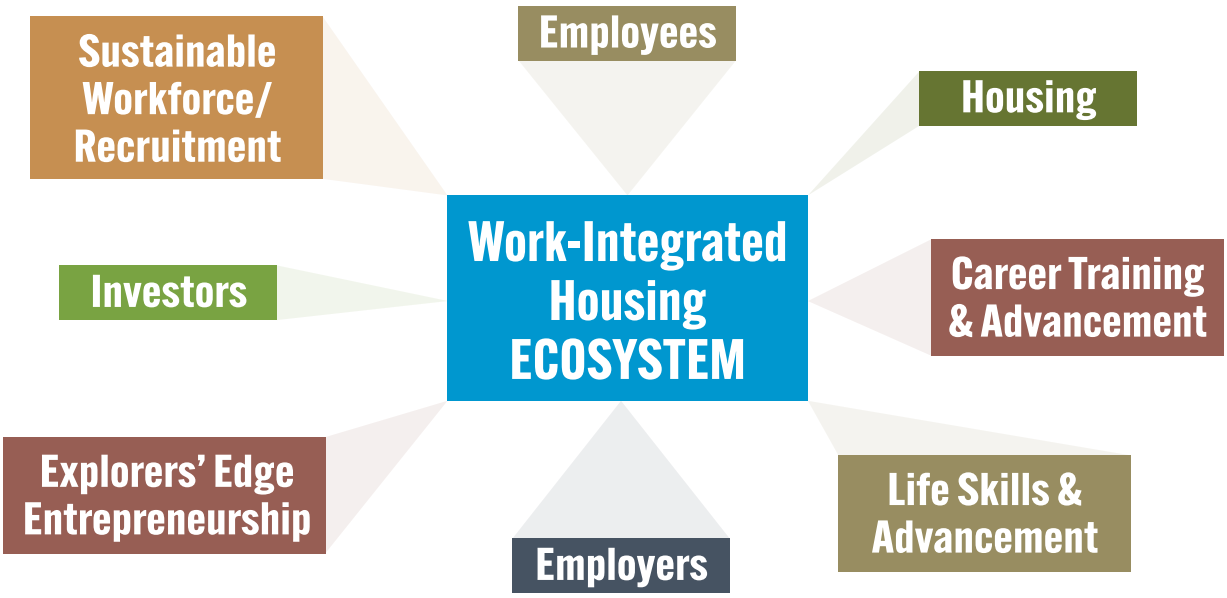
Y3

- Revise and renew training content based on user and employer feedback
- Measure KPIs
- Enhance curriculum for upcoming year
- Determine efficacy of tech for tracking and delivery
- Develop delivery partners
- Increase funding for programming
- Co-create with stakeholders
- Recruit more trainees for the catalyst housing project

Catalyst Housing:

Building for Sector & Community Sustainability

Figure 6. Catalyst Housing Project concept articulation – 2019



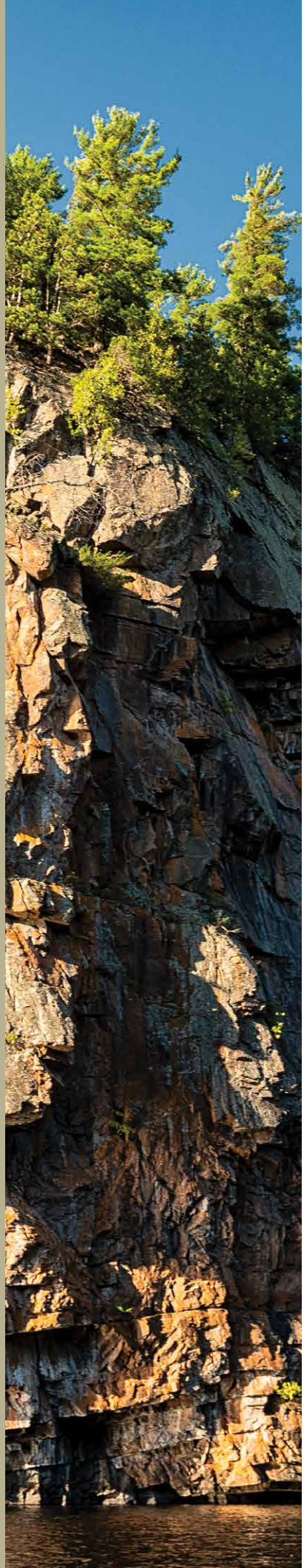
"Attract workers, develop proffesionals"

In 2018-2019, Explorers' Edge undertook an initial "Catalyst Housing Concept Research & Articulation" study to determine if a proposed solution – a new model developed and delivered by the Destination Development Organization – could address significant workforce challenges by attracting workers with a "work-integrated training and housing ecosystem."

Work on the Catalyst Housing project was somewhat stymied during the pandemic, as the industry's immediate survival took precedence. In Fall 2022, EE turned its attention once again to this innovative housing model. This project will be the biggest priority for 2023-2026.

The 1st wave Operator Survey in Spring 2022 allowed EE to estimate that, for the high seasons in particular, the regional industry was short 1,300 full-time and 4,600 part-time workers. Additionally, in the 1st wave Employee Survey (Fall 2022), the inability to make a living wage with a tourism career was identified as a detriment to working in the industry.

It is EE's position that industry housing and training are both needed to attract, develop and launch tourism professionals in our communities, particularly to fill the lower-paying positions.



Factors Affecting Attracting/Retaining Workers

- Overall loss of workers as a result of the pandemic – mass exodus the industry has not recovered from
- Negative perception of tourism as a viable career or for career development: considered precarious and low-paying work
- Shelter-to-Income Ratio (STIR) for entry level jobs is greater than 30% (therefore those incomes are not viable for housing affordability)
- The estimated **Living Wage for the region is $18.55/hour** with full time hours (which is not enough to make STIR) in a gentrified area
- Most entry level positions in tourism pay minimum wage (Spring 2022 Business Confidence Index: 20% pay less than $15/hour, 55% pay $15-20 hour)
- Market Basket Measure (MBM – a measurement to determine poverty levels) for populations in this area is $42,531 (see "The Extent & Cost of Poverty Report in Muskoka – District of Muskoka, August 2022) meaning "50% of people in Muskoka had a total income below the MBM"
- The Median Income for Muskoka is $40,800 (2020 Statistics Canada Census)
- The Median Income for Individuals in West Parry Sound (multiple municipalities average) is $40,032
- The Median Income for Individuals in the Almaguin Highlands (multiple municipalities average) is $34,800
- Population in the catchment skews older
- 55+ age group (make up big percentage of regional tourism workforce – see BCI Spring 2022) retiring or "aging out"
- Lack of youth development and retention (see **Simcoe Muskoka Workforce Development** reports)
- Improved DEI needed to welcome out-of-area workers, students and immigrants

Factors Affecting Lack of Housing Affordability

- The **median price of a non-waterfront home** in the catchment for September 2022 was $552K
- The benchmark price according to the Home Price Index for single family homes was $734,400 and for townhomes/row units it was $640,800
- For Q3 2022 (July to September) there were 2,500 active private home rentals on Airbnb, with 95% being entire home rentals
- Not enough units for current home owners to downsize and free up supply
- Lack of attainable (vs. affordable) housing
- Recently, the provincial government announced plans to aggressively build homes for the people of Ontario. Unfortunately, this will take time none-the-less, with no guarantee that there will be an influx of attainable builds in our region, or that new homes won't still be priced out of affordability by low-paid tourism industry workers.

Proposed Solution: Tourism Catalyst Housing

Explorers' Edge is proposing a new housing model to meet the staffing needs of our sector, to attract workers, to develop professionals, and to build industry and community resiliency. This model, known internally as the Work-Integrated Training & Housing Ecosystem, is currently under development.

Figure 7. Evolution of the Catalyst Housing Concept

As part of its regenerative approach, funding for the Catalyst Housing project will include a combination of public, private and impact investors. Key to success will be the development of a social enterprise business model, to ensure long-term viability of each housing project, and a ROI for investors. The model will be adaptable and scalable, depending on sub-regional needs (see Labour Gaps Analysis Spring 2022). It is anticipated that additional sectors will benefit from supporting the model in our communities, including the health care and building trades industries.

The business model for Catalyst Housing will be completed in Q2 of 2023, and a potential submission to the Canadian Mortgage & Housing Corporation's funding programs for housing innovation is being considered (due April 2023). EE is examining two streams of training for the program: 1) individual career growth and 2) business incubation and post-program business funding (introducing new businesses to our communities).

At the Ontario Tourism Summit in November 2022, EE staff was pleased to receive public support for this proposed model from the federal Minister of Tourism, the Honorable Randy Boissonnault.

Y1

- Business Model Developed
- Training assessment & curriculum development underway
- Pitch to potential investors developed/launched
- Pilot project articulated
- Potential municipal and private partners identified
- Additional sector partners engaged
- Housing Development Team created

Y2

- Test work-integrated learning curriculum with feedback from owners/trainees
- Pilot project(s) launched
- Test build and cohort launch
- Increased investor and government suport

Y3

- Catalyst Housing builds commence across the region

Product Development:

The Regenerative Travel Agency

EXPLORERS' EDGE
Transformative
TRAVEL

In 2023, EE anticipates attaining a Tourism Industry Council of Ontario (TICO) license to allow the organization to process commercial transactions for bookings. Operating as a social enterprise, the "regenerative travel agency" (internal moniker only) will serve a two-fold purpose, as detailed in the Regenerative Tourism Strategy:

1. attract higher yield visitors (stay long/spend more) and move them around the region using strategic itineraries and packages (particularly international visitors)
2. introduce a revenue stream to support sustainability programs within the region

The social enterprise model is currently in development. The proposed positioning aims to attract travellers who are seeking "transformational tourism" experiences (as part of the burgeoning "transformation economy"). Once the positioning and markets have been determined, new strategic itineraries will be developed and test experiences will be blocked for package sale.

Over the course of the commercial air service project, EE was successful in organizing the sale of almost 500 travel packages; this experience will serve us well as we launch the regenerative travel agency.

The overall package and itinerary development strategy requires a re-assessment of significant work-to-date: an "Itinerary & Package Development for International Markets Report" was completed in 2016, and additional research into international markets were conducted from 2016 to 2018 (including the Product Development Framework's Motivation Index). Staff will review this intel, and also identify any newer opportunities since the pandemic.

The project will also require the investment in a booking widget that has customized functionality. Launch is expected in Fall 2023 for selling the winter season. Consumer marketing budget should be allocated to support the launch and long-term growth of this innovative social enterprise, and particular emphasis for marketing activities should be placed on re-launching the successful lead nurturing program.

- TICO license finalized
- Social Enterprise Business Model developed
- Target markets identified
- Itinerary & package strategy and criteria established for limited/soft launch
- Branding/marketing developed
- Updates to consumer website
- Booking widget acquisition
- Launch Fall 2024 for sellinig winter season (estimated)
- Spring itineraries and packages developed for sale in winter 2024

- Itinerary & packages scaled
- Revenue model reviewed and revised
- Ongoing sales model considered
- Strategic profit dispersion to benefit local sustainability developed
- Pre-season sales underway 4-6 months out

- Itinerary & packages reviewed, scaled and enhanced
- Each sub-region represented in offerings

Product Development/Investment Attraction:

Transportation

The unexpected departure of Porter Airlines (due to the airline's own logistic and business decisions) has resulted in the ability of EE to significantly expand transportation product for the region. In Fiscal23-24, EE will consider projects pertaining to the following:

1. Commercial Air Service

Both the Muskoka Airport Board and Explorers' Edge consider the two seasons of commercial service to be enormous successes (with YOY increase in passengers from designated market areas). Though a similar investment in any new route is unlikely, we are none-the-less able to assist airport stakeholders in building a new business case to attract a new carrier(s). EE now has extensive marketing, on-site, development and partnership experience for continuing to build the service.

2. Cruise Development into Parry Sound Harbour

EE is a long-standing member of the Great Lakes Cruise Coalition and has, for many years, invested in a shuttle service during cruise season to disperse passengers into the downtown area. For Fiscal23-24, EE will work with the Town of Parry Sound economic development team in continuing efforts to ensure optimal spend during and optimal enjoyment of passengers' on-land experience. A test voucher package to disperse passengers more widely and to track economic value of a cruise tourist is being considered.

3. Passenger Rail Service

The provincial government and Ontario Northland continue to make progress towards the return of passenger service to Northern Ontario. EE will commence work to determine how tourism product and packages can be of benefit to attract visitors via this service, and to ensure the longevity of the service itself apropos revenue generated from high yield passengers.

4. Visitor and Workforce Transportation Infrastructure

The availability of transportation to work is a key consideration of employees (see Employee Survey, Fall 2022) considering a job in the regional tourism industry, and it is also essential for dispersing visitors to more remote locations within the region. More robust transportation options will be required as well, to fulfil the needs of customers of the regenerative travel agency. EE will undertake a preliminary study to determine what is already available, what can be enhanced, and what is still needed; all with an eye to potential investment and development.

- Airport/EE new business case developed for commercial air service
- Voucher program for passenger dispersion tested with cruises into PS
- Cruise shuttle audit and revised strategy
- Preliminary research into a business case for tourism rail packages on the Ontario Northland
- Research into regional transportation to benefit tourism workeres and visitors

- Toursim transportation product aligned with Regenerative Travel Agency offerings
- Passenger Rail tourism business case developed
- Cruise line dispersion strategies strengthened
- Assit with attracting cruise lines with overnight visitation or point of origin pitches

- Passenger Rail Service potential launch/marketing of associated packages

Product Development:

The Sustainable Tourism Pilot Project

In an effort to convince as many tourism businesses as possible to adopt sustainable practices on their properties, EE launched a pilot project with six tourism operators in 2022. Each undertook sustainability assessments of their property by GreenStep Solutions.

With the hiring of a part-time Sustainability Specialist, EE will work with these pilot project businesses to build a greater case for sustainability across the regional industry, and to determine KPIs for the sustainability index of the Regional Data Hub.

Y1

- Business Case developed
- Operator intelligence gathered
- Additional operators participate in certification
- On-site visits by EE Sustainability Specialist

Y2

- KPIs for Regional Data Hub established and tracked
- YOY operator assessment with original pilot project participants
- Group purchase efficiencies identified and coordinated

Y3

- Impact of sustainable tourism operations tracked and business case revised to achieve even wider regional industry participation

Systems Thinking:

The Explorers' Edge Co-Creation Lab

Finally, as part of its "community-centric approach", in 2022 EE introduced the "Explorers' Edge Co-Creation Lab" (CCL), a dynamic entity that will allow us to engage community members and to solicit the insights of technical experts from outside the industry to build programs. The CCL will help to ensure long term success of and buy-in for multiple projects, while acting as a function of a broader communications effort and as a design thinking tool.

EXPLORERS' EDGE
Tourism Co-Creation Lab

RTO12 2022-2023
GOVERNMENT PILLARS

The current mandated pillars by Ministry of Tourism, Sport & Culture for the RTO to work within include:

Product Development – to enhance visitor experience through well-designed tourism products that meet current and future visitor demand.

Investment Attraction/ Investor Relations – to increase investment in the tourism industry to enhance visitor experience.

Workforce Development and Training – facilitate and support the attraction, development and retention of a tourism workforce to enhance the visitor experience.

Marketing – to increase awareness of Ontario as a travel destination and increase conversion in target markets.

Partnership – to become a catalyst in building strategic alignment and promoting collaboration within the industry.

Additional – Industry Communication, Liaison and Accountability

High Level Goals for Each Pillar

Consumer Marketing - 303k

- "Re-boot" the consumer lead nurturing program for domestic, international and hyper-local markets, particularly with the aim of building leads for the Regenerative Travel Agency.
- Test new international markets (U.K.)
- Target hyperlocal audiences during lowest travel months (April, November) and use voucher programs to incentivize spend and promote operator liquidity
- Target domestically for 5 sub-regions that do not have a DMO (Algonquin Park, Almaguin Highlands, Loring-Restoule, Parry Sound, South Algonquin). Partner with Muskoka Tourism to delivery domestic marketing for that area (Partnership Fund)

Product Development - 101k

- Build relationships with existing Indigenous communities to determine interest in tourism product development or strategies
- Build and launch the social enterprise business model for the Regenerative Travel Agency
- Develop packages related to strategic itineraries, with the intention of converting higher-yield customers
- Develop branded travel packages such as "Fuel & Fun" or "Cottage Country Spirit Local Travel Package" to stimulate purchase when needed
- Build sustainability training programs for tourism operators/operations
- Conduct research into viability of multiple transportation sectors (air, rail, cruise, shuttles) and commence new/revised business cases

Investment Attraction - 5k

- Build community and impact investing for the catalyst housing/training program
- Build stakeholder and community membership contributions for "buffer" investing
- Continue to invest in Great Lakes cruise ship programs with the Town of Parry Sound, including shuttle service for day trip dispersion
- Continue Regional Data Hub to determine the state of the regional tourism industry in a timely manner

Workforce Development - 231k

- Develop the social enterprise business model for Catalyst Housing
- Continue micro-credential, curriculum and work-integrated learning development for the Catalyst Housing project
- Launch community sessions to pitch the Catalyst Housing project
- Conduct ongoing, timely and region-centric industry research (Regional Data Hub)
- Build targeted marketing program to attract and retain regional employees

Partnership - 166k

- Ensure regional partners understand the Region-Centric approach and have opportunities to align strategies
- Partner strategically to build the destination overall, and with a focus on regenerative initiatives
- Develop extra-industry partnerships to move projects forward (including expertise)

Industry Communication, Liaison and Accountability - 321k

- Conduct multiple sessions of the EE Co-Creation Lab, and ensure broad but deep participation
- Continue to strengthen outreach and communication with industry
- Develop outreach and communication to non-industry stakeholders
- Develop "regenerative tourism champions" across the region
- Ensure the industry is well informed on all tourism related topics (marketing, research, product development, training, investment etc.)
- Deliver and receive diversity, inclusion and equity training
- Engage with Indigenous communities as part of a Truth & Reconciliation commitment
- Determine regenerative tourism KPIs to track economic, social, cultural and environmental sustainability and growth of the regional industry and community stakeholders.

The following is a summary of the BOP23-24 implementation, as well as objectives, key activities, timelines, and performance measures for MHSTCI TPA requirements.

2022 - 2023 Business and Operational Plan Summary

Table 1. 2022-2023 Business and Operational Plan Summary

Governance 321K	Marketing 303K	Product Development 101K	Investment Attraction 5K	Workforce 231K
Govern EE through effective leadership; strong equitable industry representation; and execute optimal governance, strategies, and process. Hold annual AGM.	Promote the great Canadian wilderness brand.	Build regenerative travel agency for launch; develop high yield packages and itineraries for purchase.	Explore partnerships & investing that prioritizes regenerative tourism and workforce development.	Educate workers on the region as career destination via the Rural Tourism Certificate micro-credential.
Ensure organizational decisions meet the needs of both the tourism business community and the community as a whole to "float all boats" (including tourism SME's, employees, and residents).	Target hyper local, dom. & int'l markets, positioning "transformative experiences"	Support Town of Parry Sound cruise program.	Communicate to communities & impact investors re catalyst housing/training program opportunities.	Enhance Job Board performance and expand marketing tactics/investment for greater conversion.
Share tourism sustainability program outcomes, regenerative program development and destination development updates.	Publish exceptional content & launch promotion that is flexible, adaptable & scalable; introduce more platforms and tactics.	Continue sustainability training programs for tourism operators / operations (e.g., property stewardship guides) / hire part-time Sustainability Specialist.	Explore a tourism business case for passenger rail service.	Develop and launch 2nd annual Big Applause Awards.
Consult industry and community stakeholders; conduct regular outreach.	Sell product packages & itineraries (primary CTA) via TICO travel division.	Develop inland coast drive tour (Port Severn to Britt).	Continue as a member of the Great Lakes Cruise Coalition ensuring a robust cruise network; build dispersion of passengers into Parry Sound.	Build work-integrated learning and training curriculum for the catalyst housing project.
Expand team to meet objectives; introduce new HR policies and procedures.	Develop & promote incentivized travel packages to coincide with high yield travellers to the region.	Develop "VFR VIP" program.	Act as a resource to attract additional airline carriers to YQA.	Create development team for the catalyst housing project.
Launch Regional Data Hub online for state of the industry intel.	Develop hyper local, domestic and int'l lead nurturing to connect to regenerative travel agency launch and development.	Develop hyperlocal voucher programs for deeper shoulder season (April then November).	Conduct initial research for workforce transportation options (cross regional transport).	Build a "Neighbourhood Network" who will welcome new workers.
Launch T3Y strategy.	Leverage Destination Ontario partnership dollars for shoulder season development.			Conduct ongoing, timely and region-centric industry research (employers, employees).

2023 - 2024 BOP:
Objectives, Key Activities and Timelines, Performance Measures

Governance and Administration

Governance

Priority / Strategic Focus	Objectives	Key Activites / Tactics	Performance Indicator
Govern EE through effective leadership; strong equitable industry representation; and execute optimal governance, strategies and process. Ensure organizational decisions meet the needs of both the tourism business community and the community as a whole to "float all boats" (including tourism SME's, employees, and residents) Share tourism sustainability program outcomes, regenerative program development and destination development updates. Consult industry and community stakeholders; conduct regular outreach. Expand team to meet objectives; introduce new HR policies and procedures. Launch Regional Data Hub online for state of the industry intel Launch T3Y strategy	Introduce overarching 3-Year performance strategy Conduct ongoing Regional Data Hub intelligence gathering for the industry and residents Manage our assets and liabilities responsibly while delivering expected results on time.	Solicit community input / reaction on strategies and organizational approach (Region-Centric Regenerative Tourism Approach) via webinars and surveys reporting back on outcomes via follow-up communication. Continue governance training and diversity, inclusion, and equity training. Development of committee(s), when necessary, that is inclusive to the community. Board quarterly update, review, and input on annual BOP execution. Conduct board reviews via surveys of RTO plans and performance measures against stated objectives and targets; adjusting as required Complete a skills matrix to identify priority areas for board member recruitment. Regularly review activities, finances at board meetings.	Participation in community input sessions (target 600 participants) (target 12 webinars) (target 3 surveys). Effective board training participation (target 100% of board directors) (target – 70% of participation identify being satisfied / highly satisfied with training outcomes). Business plan participation, results of the financial audit and operational reporting (operating goals met, clean audit) Board satisfaction with governance updates and discussions at the board table regarding committee items(target – 70% of participation identify being satisfied / highly satisfied with governance outcomes).

Governance and Administration

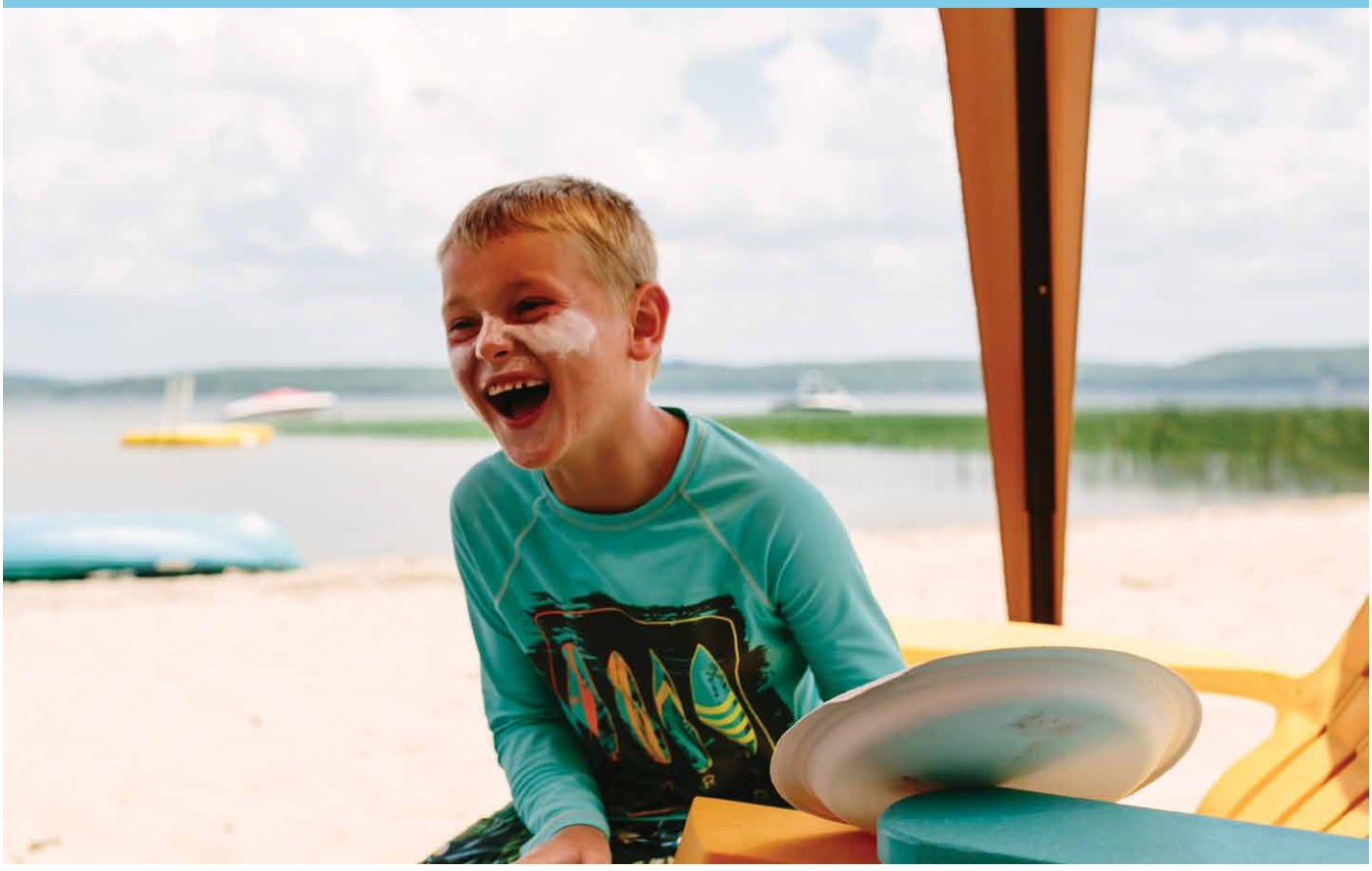
OPERATIONS

Priority / Strategic Focus	Objectives	Key Activites / Tactics	Performance Indicator
Continue with regenerative practices within the organization to benefit both internal and external stakeholders.	To steward the regional tourism recovery, rebuild and renewal. Continue to develop an investment strategy for future operational, organization and industry resiliency.	Revenue generation via membership, activities include the development, communication, and solicitation of an updated membership model. Development of investment strategy, activities include outreach, research, and input. Development of tourism award(s) with activities that include communication and participation. RTO will presentation of organizational operational updates / direction via webinar, Zoom, WebEx meetings, Microsoft Teams etc.	Membership (target – 150) Award Participants (target – 12 stakeholders) Number of stakeholders involved in the communication of organizational activities / updates (target – 1,400 stakeholders) RTO operational presentations (target – 6)

Governance and Administration

Industry Communication, Liaison and Accountability

Priority / Strategic Focus	Objectives	Key Activites / Tactics	Performance Indicator
Engage the regional tourism industry stakeholders and communities	Improve overall engagement in the community Ensure the industry is well informed on and supportive of the Regenerative Tourism Strategy.	Conduct industry webinars Engage stakeholders in different sessions of the Co-Creation Lab Strengthen communications with operators and ensure updates happen in a timely manner. Monitor Facebook business forum for feedback. Monitor Twitter for regional grievances, criticism, complaints etc. Run sub-regional town halls Host Regional Tourism Summit and AGM. Consider alternative delivery models for busy operators.	Participants on RTO webinar updates (35 per webinar). Run minimum of 4 Co-Creation labs per year (Participation target – 45 stakeholders) Number of new subscribers to organization Newsletter. (Target – 65) Identification of three stakeholder concerns to be communicated to the Board of Directors and levels of government (target – 6) Ensure over 100 stakeholders participate.



Marketing

Content Development

Priority / Strategic Focus	Objectives	Key Activites / Tactics	Performance Indicator
Create promotional content for the destination brand, sub-regions, products/ KTAs, commercial air service, and for package and itinerary sales.	Convert “discoverers” to travellers by moving them down the purchase funnel (“awareness” to package “purchase”). Capture consumer email addresses in the lead nurturing program to move registrants down the purchase funnel. Increase website analytics, sessions, users, page views, pages/ session & average session duration (via content).	Development of regional content via researching story ideas, interviewing stakeholders, alignment with research (includes interviews, photography/video development and regional outreach). Develop lead nurturing program to build for the RTA and for ongoing (quarterly) deployment Update consumer website with new content, events, pictures, listings, and packages by scanning regional and provincial partner sites and social accounts.	Regional Content developed (target – 10 sub-regional assets, 5 product assets, 10 itinerary assets) Consumer opt-in for the consumer e-mail database: (target – hyperlocal/500, domestic/1500, international/500 Website analytics including: visits (target – 150,000), page views (target – 200k), pages/session (target – 1.40) & average session duration (target – 1.20 minute)

Social Media Marketing

Priority / Strategic Focus	Objectives	Key Activites / Tactics	Performance Indicator
Introduce regional product to hyper local, domestic, and international audiences.	Create awareness of regional product and travel experiences consumers visiting on-line channels.	Traffic developed content over social media channels monitoring, updating, and responding to travel enquiries related to posted information. Update social media channels with information related to regional product and experiences. Respond and interact with travel enquiries across multiple social media platforms.	Social media analytics (MERGED) Facebook followers (target – 1,000 new) Launch branded TikTok campaign, - increase followers to 500 Launch YouTube campaign, increase followers to 500

Marketing

Transacting

Priority / Strategic Focus	Objectives	Key Activites / Tactics	Performance Indicator
Build shoulder season transacting programs with hyper local markets Support Cruise development in Parry Sound with test voucher program (potentially partnership program)	Bump spend in slowest two months with most local travellers (April, November) Disperse cruise passengers into downtown Parry Sound to spend more	Voucher Package program(s) development and deployment Communication of program, results, and outcomes.	Dispersion – continue traveller spending & dispersion in the region (target – voucher redemption in all sub regions) Redemption rate of vouchers (target – 70%) 40% voucher multiplier (sample size of reporting businesses – 20)

Package Development

Priority / Strategic Focus	Objectives	Key Activites / Tactics	Performance Indicator
The development of high yield packages to generate revenue filling an identified gap in the consumer purchase funnel	Development of high yield packages aligning with "transformative travel" positioning / regenerative travel agency model	Work with the Travel Industry Council of Ontario (TICO) to launch our inbound travel division. Outreach to tourism operators regarding criteria and scope of the high yield packages. Organization of travel packages that coincide with commercial air service. Communication of RTO specific travel packages (and criteria) Monitoring, follow-up and reporting on RTO packages.	During first year of TICO Licence benchmark revenue & expenses Targets associated with package development: 10 packages developed 5-10 stakeholders participating 50 packages sold

Product Development

Indigenous

Priority / Strategic Focus	Objectives	Key Activites / Tactics	Performance Indicator
Gain an understanding of challenges associated with Indigenous tourism operators.	Partner with a First Nations to build a tourism strategy	Continue outreach with Indigenous communities Continue Indignons dialogue and communication	Track Indigenous outcomes and exchanges communicating lessons learned One FN underway with tourism strategy by end of fiscal year

Sustainability

Priority / Strategic Focus	Objectives	Key Activites / Tactics	Performance Indicator
Position our region as a sustainable destination option.	Work towards fostering regional sustainability with tourism SMEs through out the region.	Present findings of first group of sustainable tourism SMEs at regional and provincial summits. Continue working with our accreditation consultant guiding SMEs through the process. Introduce site visits by the Sustainability Specialist.	Present findings of year one sustainable development program at three regional speaking engagements. Business Case for sustainability presented (2 presentations) 25 property visits to discuss sustainability (stewardship)

Industry Statistics

Priority / Strategic Focus	Objectives	Key Activites / Tactics	Performance Indicator
Track the health of regional tourism industry.	Ensure industry and non-industry stakeholders have access to relevant tourism statistics.	Launch Regional Data Hub online Deploy Business Confidence Index twice annually Conduct ongoing desktop research for socio, economic and ecological influences	Number of views / downloads of the online research findings (target - 125). Number of participants participating in the research dialogue via Regional Tourism Summit, quarterly stakeholder meetings and monthly webinars (target- 55) Number of research presentations (target - 2)

Investment Attraction

Communication

Priority / Strategic Focus	Objectives	Key Activites / Tactics	Performance Indicator
Make certain that Tourism is an investment priority across regional, provincial, and national networks.	Tourism investment bolsters the Workforce Thruster Strategy as it relates to the catalyst housing / training program.	Explore partnerships & investing that prioritizes workforce development. Additionally, conduct outreach, solicit feedback, and interview potential investment partners. Provide regional economic development partners with project outlines and applicable updates related to the progression of forthcoming investment projects in the region. Present and communicate the concept of impact investing and community bonds.	Involvement in investment seminars, meetings, and workshop(s) (target - 10) Regional outreach / update engagement sessions (target - 5)

Transportation

Priority / Strategic Focus	Objectives	Key Activites / Tactics	Performance Indicator
Build opportunities for increased dispersion via transportation opportunities	Increase accessibility via multiple modes of transport (air, bus, train, etc), as per the Product Development Framework gap analysis.	Examine the necessary foundational work for the development of a tourism business case for passenger rail service. Additionally, conduct rail passenger interviews with key national and international experts. Support the Great Lakes Cruising Coalition (GLCC) with membership and input as it related to their efforts during the travel ban. Support Town of Parry Sound economic development to attract cruise lines and to pitch overnight excursions. Continue dialogue with partners involved in the commercial air service program maintaining dialogue. Additionally, provide input into additional investment into the commercial air service program.	Passenger Rail Interviews (target - 6) Great Lakes Cruising Coalition Events (target – 6) Town of Parry Sound eco dev meetings (target - 4)

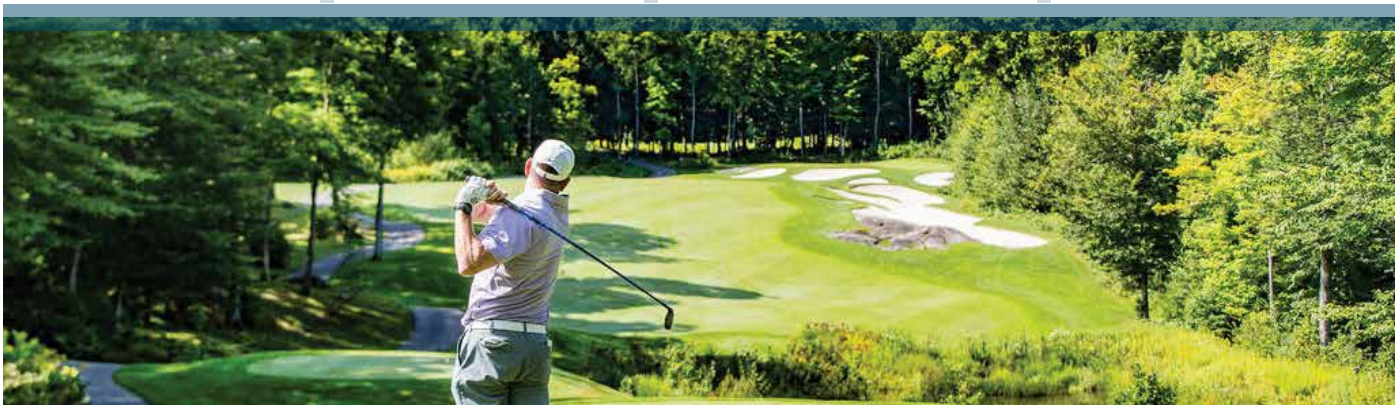
Workforce

Work Force Inspiration & Intelligence Gathering

Priority / Strategic Focus	Objectives	Key Activites / Tactics	Performance Indicator
Endorse tourism as a career.	Showcase tourism as a desirable and applicable career choice showcasing region as a premier tourism career destination.	Continue work with high schools, colleges, and universities to Inspire and gather intelligence related to student career sentiment towards tourism. Communication of career options via content, zoom recruitment and familiarization tours along with the circulation of the Rural Tourism Certificate Micro Credential. Work with existing organizations to coordinate workforce development, opportunities in the region.	Number of educational institutions working with the RTO (target – 5) Students that the RTO engages with (target – 250) Completion of Rural Tourism Certificate Micro Credential (target – 150)

Work Force Communication

Priority / Strategic Focus	Objectives	Key Activites / Tactics	Performance Indicator
Communicate the possibilities regional workforce opportunities	Involve youth, return-to-work, immigrant, international students, and 'she-covery" audiences via communication outreach.	Update communication plan for additional audiences related to research outcomes. Continue to capture contact information to continue dialogue while gauging feedback. Continue to create content positioning the region as a career option related to tourism.	Leads captured related to interested individuals and audiences (target – 50) # of pieces of content related to workforce development (target – 2) # of content views (target – 250)



Workforce

Work Force Recruitment & Welcome

Priority / Strategic Focus	Objectives	Key Activites / Tactics	Performance Indicator
Convert Urban graduates to rural employees.	Introduce graduates to rural tourism opportunities.	Continue “Neighbourhood Network” program that educates, welcomes, and converts urban graduates. Continue outreach to service clubs to ascertain involvement and support. Assemble regional ambassadors, on board and brief on program objectives. Additionally, link the ambassadors with Urban graduates.	Ambassador to graduate network / relationships (target – 40 matches)

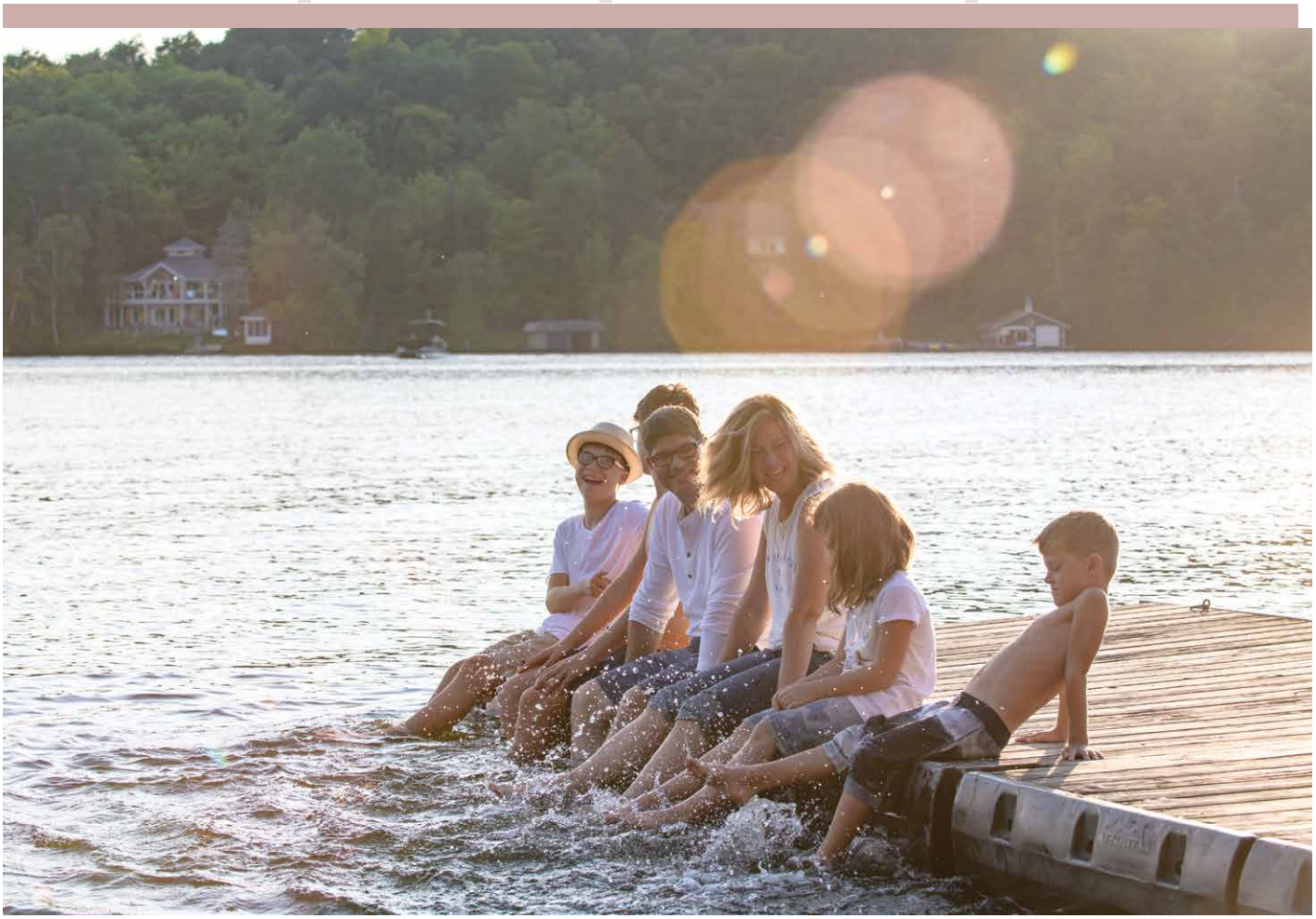
Work Force Research

Priority / Strategic Focus	Objectives	Key Activites / Tactics	Performance Indicator
Gain a comprehensive understanding of the current workforce landscape	Gain a thorough understanding of employment insights via residents who don’t work in the industry, those who currently work in the industry and those who have left the industry. Obtain information on labour shortages via tourism business owners in the region.	Development of surveys related to employment insights and labour shortages. Review and integrate research outcomes into upcoming strategies / operation plans Solicit feedback from community partners related to research objectives. Communicate research outcomes to regional partners, board of directors and stakeholders.	Research presentations to regional stakeholders (target – 3) # of downloads of research (target – 200) # of times research is used by stakeholders (other than the RTO) to support business plan development (target – 10)

Partnership Allocation

Marketing & Communication

Priority / Strategic Focus	Objectives	Key Activites / Tactics	Performance Indicator
Collaborate with partners that align communication and marketing with RTO priorities and objectives.	Work in partnership with stakeholders to ensure regional product, experiences, and programs that align with 2023 – 2024 RTO12 objectives.	Using staff resources communicate organizational operational plans, strategies, objectives, and outcomes. Circulate partnership criteria and process to regional stakeholders. Work with third party(s) to establish partnership work plans, key deliverables, and dates. Using staff resources communicate mid partnership progress and final report to board of directors and stakeholders.	# of communication and marketing partnerships (goal and target – 8)



Marketing Communications 2023-2024:

The announcement in early January 2023 by Porter Airlines that they would not be continuing with the third year of the 3-Year, tri-party commercial air service agreement required a pivot in marketing strategy by Explorers' Edge for the upcoming fiscal year. Funds that otherwise would have gone to support to continuous building of the service could now be re-directed. Strategically, over the course of the pandemic and in the previous fiscal year when operation restrictions were finally lifted, EE had already tweaked many of its marketing priorities based on significant learnings.

Therefore, the marketing for BOP23-24 now prioritizes the following:

- Targeting hyper-local, domestic and international markets, particularly in the shoulder seasons (winter especially)
- Leveraging local travel packages (voucher programs) to incentivize locals (only) to purchase during the slowest two months (April, November)
- Marketing 5 of the 6 sub-regions; supporting Muskoka Tourism to take the lead in Muskoka
- Leveraging partnership funds from Destination Ontario for shoulder season drive markets
- Cleaning and building the associated lists for hyperlocal, domestic and international audiences for significant re-launch of the successful lead nurturing program (suspended during the pandemic)
- Testing international markets besides U.S.
- Promoting "transformative experiences" as part of package and itinerary development for the Regenerative Travel Agency
- Branding and launching the Regenerative Travel Agency ("Explorers' Edge Transformative Travel")

Marketing Communications 2023-2024:

The Regenerative Travel Agency: A higher yield dispersion initiative

In 2023, all marketing will be positioned to build leads for the regenerative travel agency (RTA). Operating as a social enterprise, the RTA will serve a two-fold purpose, as detailed in the Regenerative Tourism Strategy (BOP2021-2022):

1. attract higher yield visitors (stay long/spend more) and move them around the region using strategic itineraries and packages (particularly international visitors)
2. introduce a revenue stream to support sustainability programs within the region

The (draft) positioning aims to attract travellers who are seeking "transformational tourism" experiences. Once the positioning and markets for the travel agency have been determined (Q2), new strategic itineraries will be developed and test experiences will be blocked for package sale (anticipated on sale Q3 for Q4 product).

The overall package and itinerary development strategy requires a re-assessment of significant work-to-date: an "Itinerary & Package Development for International Markets Report" was completed in 2016, and additional research into international markets were conducted from 2016 to 2018 (including the Product Development Framework's Motivation Index). Staff will review this intel, and also identify any newer opportunities since the pandemic.

The project will also require the investment in a booking widget that has customized functionality. Marketing budget and campaigns will be developed to launch and ensure the long-term growth of this innovative social enterprise, and particular emphasis for marketing activities should be placed on re-launching the lead nurturing program.

There are currently 10, 174 leads in the database, with approximately 700 leads being added annually without any significant CTA. The objective will to be to add 2,500 leads, and to introduce commercial conversion goals for the RTA (TBD when business model is complete).

Hyper Local Markets: Bumping Shoulder Season Spend

The pandemic saw the exponential rise of hyper local travel to sustain regional businesses. Marketing to 'backyard tourists' is now a staple strategy of any destination and will remain so for a long time to come. Explorers' Edge will continue to build this audience to promote intra-regional travel and make particular use of incentivized local travel packages to do so, particularly to bump spend in the slowest of the shoulder season months, April and November.

With efforts to attract more airlines and to build the case for passenger rail service being undertake in 2023-2024, a key learning from the experience with Porter Airlines is that outbound travellers are important for overall load factor success. To that end, engaging hyper local travellers to disperse and spend within the region will help to build a data base of leads to mobilize for two-way travel in the event these transportation initiatives come to fruition.

Marketing Communications 2023-2024:

Domestic Markets

Prior to the pandemic, EE had commenced focusing primarily on international audiences, in order to attract higher yield visitors. During the pandemic, however, and with the business objectives of the commercial air service taken into consideration, starting in 2020, domestic audiences were once again a priority in order to ensure the sustainability of the industry. Give the somewhat still unpredictable nature of global travel trends, EE considers it prudent to continue marketing to domestic markets, particularly the 10 million people in the GTA and Golden Horseshoe areas ("low lying fruit").

However, there is within the region a great deal of duplication by tourism promoters, agencies, economic development departments, HMATAs, Chambers of Commerce and micro-entities in marketing to domestic markets, particularly in Muskoka.

EE will therefore prioritizing promotional marketing of 5 of 6 sub-regions, which do not have a funded Destination Marketing Organization, like Muskoka does. (EE will support Muskoka Tourism in its efforts to market this sub-region via the partnership program, depending on program alignment and only on a project-by-project basis, not as flow through funding.) Because of the high occupancy rates in summer, paid promotion will focus on the shoulder seasons mainly.

The Return of International Visitors

The commercial air service project proved the long-standing case that EE can attract international audiences from designated marketing areas (DMAs) using direct-to-consumer (DTC) social content campaigns. YOY, visitors from American DMAs increased by 34%, the highest increase of targeted audiences for the service.

With the cessation of service, EE will now return to DTC campaigns that test additional international markets, particularly the U.K., in order to build leads for the RTA. (Traditionally, EE limits efforts to English-speaking audiences in order to not incur the significant cost of translation services.) EE will target fly & drive audiences associated with Pearson International Airport.

A recent report by the World Travel & Tourism Council noted the significant intent of travellers to visit international destinations in 2023, making this an important market for EE's higher yield strategy. Based on previous (and extensive) experience, EE will create self-determining content marketing initiatives to reach these audiences, rather than rely on federal or provincial marketing agencies to distinguish the region.

Great Lakes Cruising

In an effort to increase dispersion of cruises passengers from 33 ships arriving in Parry Sound this summer for greater economic impact, E will work with the economic department at the Town of Parry Sound to create dispersion strategies and campaigns. A test voucher program (partnership) will allow partners to track behaviours of these visitors when they are onshore.

Marketing Communications 2023-2024:

VIP VFR

A significant, untapped opportunity to target visiting friends and relatives to the region will be addressed in F2023-2024 with a campaign to get these travellers "off the dock and into town." Day excursions and overnight escapes will be marketed, with the potential development of the "VIP VFR" pass (offering discounts or incentives for multiple purchases). The latter may take multi-year development.

Coastal Tour Strategy

A test drive market will be developed for the itineraries and packages program of the RTA, featuring stops inland from and on Georgian Bay from Port Severn to Britt.

The South Algonquin Loop & The Loring-Restoule/Golden Valley Tour

Additional itineraries will be developed to specifically disperse visitors to more remote areas of the region.

New Segments in a Covid World

In the summer 2020, Explorers' Edge undertook a substantial region-centric consumer research study
(Click Here - Appendix 2) to determine macro and micro travel intentions in pandemic/post-pandemic times.

The results indicated that the regional brand – "The Great Canadian Wilderness Just North of Toronto" – will resonate extremely well with domestic and international travellers for years to come and act as a catalyst to book.

As a result of the study, which included factor analysis of the primary research, Explorers' Edge created four new traveller segments, two of which became the primary audiences for targeting in 2021-2022, and which will continue for 2023-24.

Marketing Communications 2023-2024:

Top Priority Segment 1:

Excellent alignment with brand, regional offerings, and KTAs

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Top Priority Segment 2:

Highest % of most-likely-to-travel/Millennials

Can this working file be supplied?

Test Segment: Transformative Traveller

A January 2023 report from the World Travel & Tourism Council found "a heightened appetite for sustainable tourism with 69% of travellers actively seeking sustainable travel options" (see "**WTTC and Trip.com Group global traveller report reveals shift towards sustainable travel**"). As part of the Regenerative Tourism Strategy, and closely aligned with EE's targeting tourists who want a sustainable experience, in 2023, EE will develop a segment based on the principles of "transformation travel" (see **https://skift.com/insight/skift-trends-report-the-rise-of-transformative-travel/**)

This burgeoning sector developed significantly out of the same pandemic-induce movements such as the mass workforce exodus/resignation, quiet quitting and an increased demand for work/life balance and WFH options. It is particularly popular with younger travellers, who find themselves prohibited from traditional markers of success, such as owning a home. Instead, they seek experiences that will help them become self-actualized, and which will result in a feeling of personal growth.

There is a significant increase in travellers who not only want sustainable experiences, but who also seek getaways that will be transformative in some way. Key for this type of travel are destinations where Nature is the main product offering, and the EE region is, therefore, ripe to tap into this segment. Additionally, unlike traditional segments that single out particular activities (e.g. fishing, hiking, paddling, etc.), the segment targets anyone who wants a transformative experience in Nature, with any number of activities available to them to produce this; income levels and interests may differ, but the key message is a transformative experience can be found in this particular place – the great Canadian wilderness north of Toronto – by everyone.

Itineraries and packages that are sustainable and transformative will be prioritized for the RTA to attract international visitors in particular. This will be a differentiation for EE in the marketplace as well.

Marketing F2023-2024

THE GREAT CANADIAN WILDERNESS
JUST NORTH OF TORONTO

Overall Goal:

Build hyper local, domestic, and international leads and convert them to higher yield* travel purchasers of vacations in the great Canadian wilderness just north of Toronto.

*Higher yield does not connote luxury travel segments only. Rather it is travellers who stay longer and spend more, regardless of their travel budget and intentions. The aim is to attract more of these visitors, instead of mass volumes of lower-yield visitors.

Tactics:

- Content Development, with a particular emphasis on increasing video production/use
- Facebook (promoted posts and ads)
- Instagram (brand building)
- Twitter (events only)
- TikTok (significant development)
- YouTube (significant development including advertising)
- Display Advertising (for package promotion)
- Potential Retargeting with Display
- Lead Nurturing (database and email marketing, which includes segmenting hyper local, domestic, and international leads for better quality interaction and better chance of conversion)
- Earned Media: develop robust hyper local, domestic, and international media databases to promote the RTA

Overall Strategy:

Use proven social content marketing program to promote itineraries and packages to attract and convert higher-yield travellers, whether originating from hyper local, domestic, or international markets, into purchasers (move them down the purchase funnel).

With this strategy, traditional KPIs such as impressions and reach will be considered less of a priority than tracking actual conversions from the "discovery" level at the top of the funnel, down to purchasing a package/itinerary from the Regenerative Travel Agency. Tracking of benchmark results, therefore, should be completed once the RTA is live, and it is anticipated that results in Y1 will be modest (see "T3Y" process) as development of the program begins.

Measurable Objectives:

- Increase hyper local, domestic and international leads to 2,500
- Produce and promote minimum 10 content assets to market 5 of 6 sub-regions (multiple channels)
- Product content assets for the VIP VFR, the Georgian Bay Coastal Tour, the South Algonquin Loop, and the Loring-Restoule Golden Valley Tour
- Brand and launch the Regenerative Travel Agency, including specific marketing plan and specific KPIs (in development)
- Sell minimum 50 multi-day itinerary packages in the test year for the RTA

Activity Timeline:

See BOP Activity Chart on page 44

Budget:

See BOP Budget on next page.

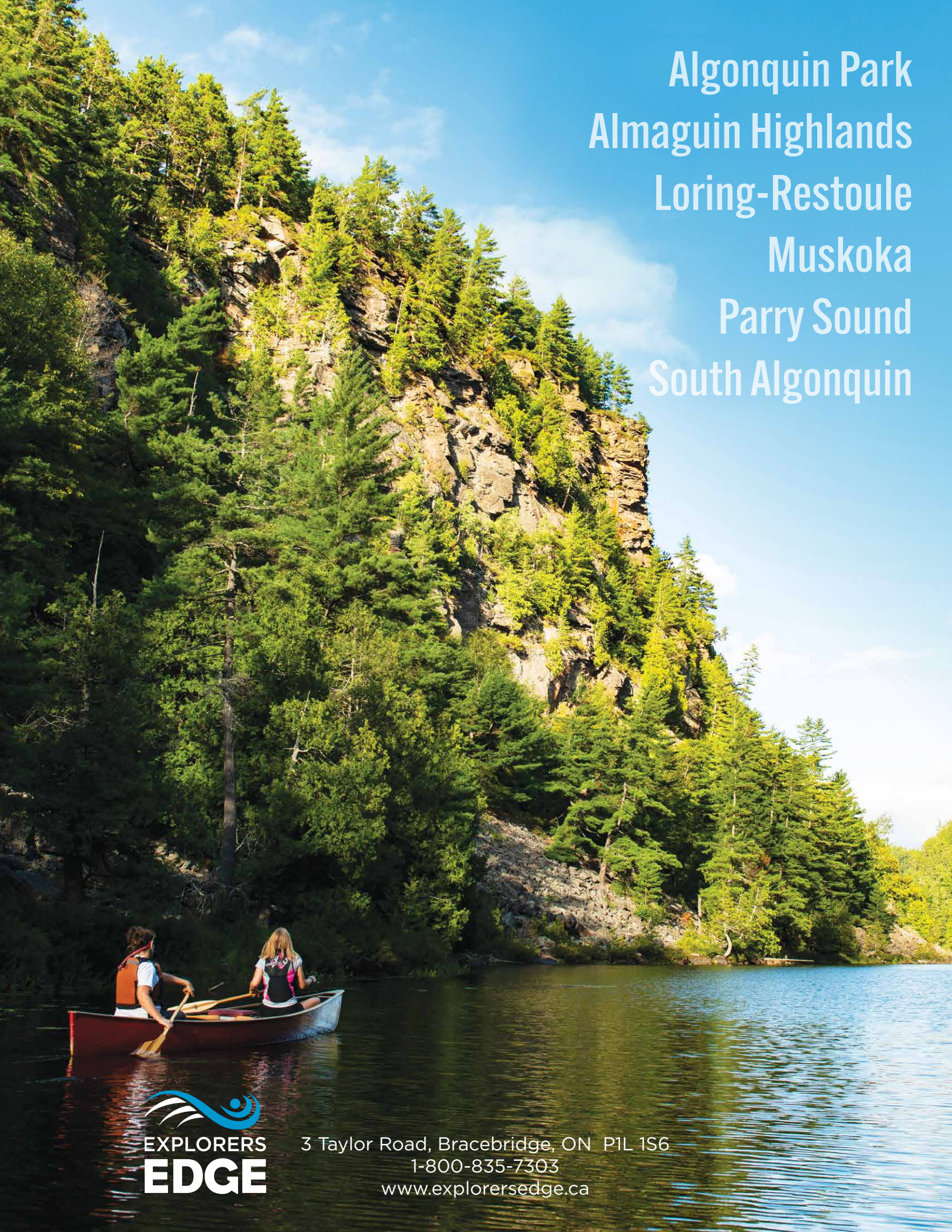
The Partnership Program

The Partnership Program will once again be an opportunity for industry and community partners to collaborate with Explorers' Edge on mutually beneficial and strategic initiatives. As part of its "Region-Centric Regenerative Tourism Approach," priority will be given to projects that help Explorers' Edge move towards its newly stated Destination Development 'goal posts.'

Staff will actively seek out significant, innovative, and strategic partnerships to further develop the organization's goals.

2023 - 2024 Budget

BUDGET ITEMS	Q1	Q2	Q3	Q4	TOTAL
Governance and Administration					
Salaries & Benefits	35,000	35,000	35,000	35,000	140,000
Governance	1,000	1,000	1,000	1,000	4,000
Overhead / Facilities	24,250	24,250	24,250	24,250	97,000
Finance and Administration (Accounting, Audit, Legal)	10,500	10,500	10,500	10,500	42,000
Travel	8,000	8,000	8,000	8,000	32,000
Industry Relations / Stakeholder Engagement	1,125	1,125	1,125	1,125	4,500
Information Technology	500	500	500	500	2,000
SUBTOTAL					**321,500**
Product Development					
Salaries & Benefits	5,000	5,000	5,000	5,000	20,000
Product Development Strategy Development (Indigenous, VFR, Coastal)	8,000	0	8,000	0	16,000
Research - Business Confidence Index	15,000	5,000	15,000	0	35,000
Research - Incentive, Analysis & Reporting	15,000	5,000	10,000	0	30,000
SUBTOTAL					**101,000**
Marketing and Promotion					
Salaries and Benefits	28,750	28,750	28,750	28,750	115,000
Domestic Marketing	25,000	25,000	0	25,000	75,000
International Marketing	0	0	20,000	10,000	30,000
Promotions/Contests/Incentives	0	0	1,500	1,000	2,500
Creative Development	1,250	1,250	1,250	1,250	5,000
Project Mgmt. Ad Trafficking	4,000	4,000	0	2,000	10,000
Strategist (Billable Hours)	7,500	0	0	7,500	15,000
TICO	0	0	0	3,000	3,000
Newsletter	750	750	750	750	3,000
Transacting / Dispersion / Tracking	0	45,000	0	0	45,000
SUBTOTAL					**303,500**
Investment Attraction					
Salaries & Benefits	1,250	1,250	1,250	1,250	5,000
SUBTOTAL					**5,000**
Workforce Development					
Salaries & Benefits	15,250	15,250	15,250	15,250	200,000
Workforce Job Communication	10,000	5,000	3,000	8,107	26,107
Workforce Big Applause Awards	40,000	20,000	20,000	15000	5,000
SUBTOTAL					**231,107**
Partnership					
Salaries & Benefits	5,000	5,000	5,000	5,000	20,000
Marketing & Communication	50,000	25,000	10,000	15,000	100,000
Workforce Initiatives	5,000	30,000	15,000	16,000	66,000
SUBTOTAL					**186,000**
TOTAL AGREEMENT COSTS					**1,148,107**



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