
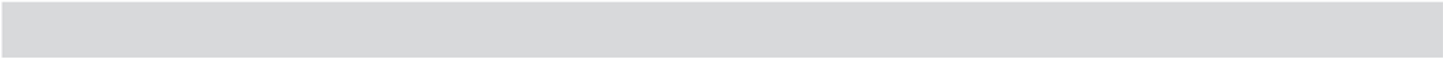


GROWING TOURISM TOGETHER



Strategic Framework
for Tourism in Ontario





Cover Photos (from left to right):
Indigenous Experience in Ottawa; Snapping
a photo at Yonge Dundas Square in Toronto;
and Snowshoeing in Thunder Bay.

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Fishing in Buckhorn Lake, Peterborough

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Minister's Message



From urban cities to rural and northern communities, Ontario is proud to share our province's culture, diversity and rich natural landscapes with millions of visitors each year.

Reflecting our history and growth as a province, Ontario's Indigenous, Francophone and multicultural communities form an integral part of our province's stories and experiences. From unique downtown neighbourhoods to vivid natural landscapes, Ontario has much to offer and explore. Whether you are an adventurer, sports fan, arts lover or foodie, everyone can find something to discover and enjoy in Ontario.

Our government understands the important role the tourism industry plays in building a strong economy and the positive impact it has on the lives of everyday Ontarians. Together with the culture and sport sectors, tourism generates good jobs for people, brings in billions of dollars in revenue and strengthens communities across the province.

All of us can be proud of the work we have done to produce this Strategic Framework. Beginning in the fall of 2015 and continuing through this past spring, we engaged people from across the tourism sector to exchange ideas, identify barriers and find opportunities for innovation. The many ideas we heard, including ways to support youth, the largest demographic employed in the sector, have been invaluable.

The Framework is a shift in the way government and industry work together, by encouraging more collaborative and innovative approaches to tourism that focus on outcomes. The five-year Framework builds on the work started through *Ontario's Tourism Action Plan*, released this past summer, and complements the work already underway through our government's *Culture Strategy* and sport plan, *Game ON*.

I would like to thank my colleague, the Honourable Michael Coteau, former Minister of Tourism, Culture and Sport, for his leadership throughout the engagement process and the development of *Ontario's Tourism Action Plan*. Both Minister Coteau and I are grateful to the hundreds of tourism stakeholders who shared their advice and valuable insights.

We all have the same goal; we want Ontario to stand out as a destination of choice for travellers. The Framework is an important step in realizing this goal.

I am excited to launch our Strategic Framework for Tourism in Ontario. I look forward to continuing our work to grow tourism in Ontario.

A handwritten signature in black ink, appearing to read 'Eleanor McMahon'.

Eleanor McMahon

Minister of Tourism, Culture and Sport

Message From The Tourism Industry Association of Ontario



Since 2007, the Tourism Industry Association of Ontario (TIAO) has been working with the Government of Ontario to position the tourism industry for growth. Together, industry and government have realized many accomplishments. But there is still room to grow.

In the fall of 2014, we released our report, *Mapping Ontario's Tourism Future*, which provided recommendations to government to grow the tourism sector, including the need for a five-year strategic plan for Ontario tourism.

Last fall, the ministry took on that recommendation and a lead role in developing this Strategic Framework for Tourism in Ontario. Through the process, the ministry committed to working collaboratively with the industry to ensure success. Many took the opportunity to participate and provide input during the consultations. From business owners to tourism organizations, from all parts of the province, it was great to see industry leaders and champions contribute their ideas. Reading this report, you will hear so many of our voices reflected in the identified priorities.

This is a beginning. Now is the time to roll up our collective sleeves and get to work. Industry and government have significant roles to play in maximizing the growth of



Canoeing in Tobermory

Ontario's tourism sector. At TIAO, we acknowledge the opportunities for industry to take a stronger role in addressing the challenges facing our industry, including work and labour force development and reducing the regulatory burden.

The Strategic Framework for Tourism is a guide for industry and government as we work together to achieve our share of the global market. Through collaboration and strong partnerships, we will meet our vision and mission for Ontario tourism and strengthen our industry.

Congratulations to all who helped to shape this Framework.

A handwritten signature in dark ink, reading 'Beth'.

Beth Potter

President and CEO, Tourism Industry Association of Ontario

Executive Summary

With the release of the Strategic Framework, the government is responding to the industry's call for a more collaborative and outcome-focused approach. Through a unified vision that aims to position Ontario as a preferred global tourism destination, our intention is to work with industry to attract more visitors to Ontario, and meet or exceed global tourism growth over a five-year period.

Ontario's tourism industry contributes to the province's economy and quality of life by creating jobs, promoting pride of place and celebrating the diversity of communities across the province. The Ontario government understands that in order to capture its share of visitors and ensure the tourism industry continues to grow, the sector must continue to adapt to changing global conditions and traveller needs.

Starting with the release of the 2009 report, *Discovering Ontario*, the government has continued to develop tools and industry capacity to drive change. Since then, the government has worked with its industry partners to put a more strategic lens on tourism investment attraction, new products and marketing, and the enhancement and alignment of our culture, sport, and tourism sectors.

The Tourism Industry Association of Ontario (TIAO)'s report, *Mapping Ontario's Tourism Future*, released in fall 2014, outlined progress made from the 2009 Discovering Ontario recommendations and provided insight into

many themes and current issues facing the tourism sector in the province.

The release of Ontario's sport plan, *Game ON*, and the *Ontario Culture Strategy* over the past year have strengthened the foundation for collaboration and integration between the culture, sport and tourism sectors, creating tools we need to encourage growth.

“In order to capture its share of visitors and ensure the tourism industry continues to grow, the sector must continue to adapt to changing global conditions and traveller needs.”

Last June, following broad engagement with industry stakeholders to review progress and look for more areas of improvement, the government released *Ontario's Tourism Action Plan*. It demonstrated the government's leadership and ongoing commitment to support the tourism industry by taking action in key priority areas, while paving the way for the implementation of this broader five-year Strategic Framework.

Industry has a significant role to play in maximizing the growth of Ontario's tourism sector by collaborating and building

Executive Summary *continued*

relationships with key partners. The government is encouraged by the leadership that industry is already taking. Recently, the Ontario Chamber of Commerce released a forward-looking report on how the sector can collaborate to improve avenues for success. The report provides an examination of provincial tourism industry trends and presents recommendations for government and industry to work together to boost long-term competitiveness and generate sustainable demand for Ontario tourism. As well, TIAO is leading discussions on how to identify and remove regulatory burdens, and how to improve workforce development, including recruitment, retention, training and

leadership designed to address tourism labour gaps.

Building on the successful relationships and tools already in place, government will work with industry by aligning marketing efforts, leveraging the regional tourism approach, developing the workforce and improving the business climate for tourism throughout Ontario.

The Strategic Framework is the next step to support future growth and success. It will help guide the tourism industry and government to work together in an increasingly dynamic global market.



Enjoying the sunset at Lake Superior Provincial Park

Tourism And The Economy

Tourism is a pillar of Ontario's economy; it supports healthy and prosperous communities, and is fundamental to our quality of life. It is therefore necessary for government and industry to support the tourism sector's continued growth in the province by attracting a greater share of a growing number of global travellers, and encouraging longer visits and greater expenditures.

International tourist arrivals to all global destinations reached 1.18 billion in 2015—an increase of 4.6 per cent since 2014. This increased travel supported a 4.4 per cent increase in tourism receipts.¹

Looking at those figures competitively, it should be noted that international tourist arrivals to emerging economies are projected to grow at double the rate of those to advanced economies.²

Over this period, Ontario has enjoyed an increase in the number of international tourist arrivals, with close to 13 million visitors arriving in 2014, representing a 1.3% increase from 2013, and the value of Ontario's

international tourism receipts has increased by 15.4% from 2013 to \$5.5 billion. The future continues to look positive with growth in visitors coming from South Korea, Mexico, and in particular from China, where visitors to Canada are on track to triple between 2010 and 2018. Projections suggest that by 2019, the largest volume of international visitor expenditures will be invested in Ontario by travellers from the United States, China and the United Kingdom, while all visitations from source markets will grow.

Attracting international visitors from the United States, Europe, Asia, and South America is an intensive endeavour, impacted by evolving conditions and expectations that determine where tourists travel and how much they spend.

Economic volatility, fluctuating currencies, safety and security, shifting demographics, innovations in technology, and demands for new experiences all have a significant impact on who travels and to where, as do the events, attractions and experiences that are offered to travellers.

Global Tourism Growth

Increase of 4.4% of international tourism arrivals globally in 2014, with an additional increase of 4.6% in 2015



Increase of 3.6% of international tourism receipts globally in 2014, with an additional increase of 4.4% in 2015

¹ UNWTO tourism highlights 2016

² Ibid.

Tourism And The Economy *continued*

Ontario's Tourism Performance 2014



Over \$29.8 billion in tourism receipts (+4.5% since 2013)



140 million in total visits (-1.0%) and \$23.9 (+5.1%) billion in visitor spending



Tourism contributes \$26.6 billion to Ontario's GDP



Tourism contributes \$5.1 billion (+4.4%) to provincial tax revenues



Tourism contributes \$1.4 billion to municipal tax revenues



180,000 tourism-related businesses



372,000 tourism-related jobs, accounting for 5.3% of Ontario's total employment (+2.7% since 2013)



23% of the total employees in Ontario aged 15-24 years in 2012 were employed in tourism



13 million International Tourist Arrivals in Ontario (+1.3% since 2013) (7.6 million in overnight (+4.0% since 2013))



\$5.5 billion generated in International Tourism Receipts (+15.4% since 2013)

More and more countries are expanding their tourism offerings to entice international tourists. Many jurisdictions, like the United States, are competing for traveller's attention by investing in new tourism marketing and products. The United States continues to be the top earner of international tourism receipts at \$146 billion (USD) in 2014, achieving a higher per-capita of receipts when compared to Canada at \$13 billion (USD) and Ontario at \$5 billion (USD).

Despite intense competition, Ontario's domestic market continues to be strong, and there is an opportunity to target international visitors more effectively to

capitalize on the growth in global tourism. To be sustainable, it is not enough to rely on strong global economies and favourable exchange rates. Ontario's tourism industry must adapt to global trends, experience expectations, and evolving traveller needs. Together, government and industry will need to build on the strengths the tourism sector can control, such as visitor offerings, marketing, workforce development and improvements to Ontario's business climate.

The Government of Ontario is committed to working with the tourism industry to meet this challenge by creating a supportive and stable environment for businesses to adapt and thrive.

Driving the Impact of Cultural and Sport Tourism

Ontario's culture and sport sectors are key components of the tourism industry, contributing to the overall visitor experience and economic impact through cultural agencies and attractions, festivals, heritage buildings and locations, live performances and sporting events. All of these experiences constitute 'trip enhancers' and in the case of major sport events, 'trip motivators,' both of which are essential to the tourism offer.

Tourism, culture and sport each contribute significantly to Ontario's economy. About 14 percent of total visitors that come to Ontario participate in cultural or sporting activities. Specifically, the live music sector generates \$455 million in revenues and contributes \$252 million annually to the Canadian economy. Also, the 2015 Pan Am and Parapan Am Games in Toronto, the largest multi-sport games in Canadian history, created an estimated 26,000 jobs and boosted Ontario's real GDP by up to \$3.7 billion between 2009 and 2017.

With support from the province through a variety of initiatives and programs such as the Ontario Music Fund, Sport Hosting Program, Ontario Cultural Attractions Fund and Celebrate Ontario Program, Ontario's destinations are developing new ways to attract visitors and investing in new tourism assets in Ontario communities.

A Shared Goal for Sport Tourism

The Regional Sport Tourism Office is a unique partnership between Regional Tourism Organization 4 Inc. (RTO4) and the cities of Kitchener, Waterloo, Cambridge and Guelph. The Office leverages sport infrastructure assets in each city and presents them as a unified product for potential sporting events in the region.

The Office was created by RTO4 in 2013 to align and leverage the significant asset base that pre-exists in the region and, to date, has garnered co-investment on both an ongoing and project basis with the City of Kitchener, the City of Waterloo, the City of Cambridge, the City of Guelph, the University of Guelph, Wilfrid Laurier University, the University of Waterloo as well as Visit Guelph, Waterloo Regional Tourism, RIM Park and a host of regional stakeholders including accommodation and hospitality partners.

The Regional Sport Tourism Office identifies the needs of potential stakeholders and provides industry knowledge, resources, and expertise for successful sport tourism events. Past successful events include the Ontario Volleyball Championships, ISC World Men's Fastball Championships, Manulife Financial LPGA Classic, Provincial 'A' Ringette Championships, and the Triathlon Ontario Club Championships, bringing great economic impact to Ontario.

Tourism And The Economy *continued*

Through the Ontario Music Fund (OMF), the government invests \$15 million each year to increase music production activity, strengthen Ontario's music industry and create opportunities for emerging artists and music businesses. With the permanent OMF as a foundation, we will continue to build Ontario as a leading North American centre for music production and performance, as well as spur music tourism by setting a vision and directions to further the development of the Ontario Live Music Strategy. The province is investing in the Ontario Cultural Attractions Fund to support cultural and heritage events in 2014-15 and announced an investment of \$6 million over three years, from 2015-16 to 2017-18.

The government has also invested over \$11 million in 62 sporting events since 2013 through the Sport Hosting Program. Additionally, the government is providing more than \$23 million to support multi-sport events across the province, including the 2017 North American Indigenous Games, 2017 Invictus Games and 2021 Canada Summer Games. Collectively, these investments position Ontario as a key destination for sport and increase economic activity through job creation and promote community growth by encouraging the development of high-performance sport infrastructure and cultural opportunities.

Ontario's first-ever ***Culture Strategy***, released in 2016, commits the government

Culture

In 2014, 12.2 million visitors participated in cultural activities in Ontario and spent \$6.5 billion on their trip to the province.



Sport

In 2014, 8.1 million visitors participated in sports in Ontario, either as a spectator or a player, and spent \$2.3 billion on their trip to the province.³



³ Derived by the Ministry of Tourism, Culture and Sport from Statistics Canada's Travel Survey of Residents of Canada and the International Travel Survey, 2014



Appreciating artwork at the McMichael Art Collection in Kleinburg

Tourism And The Economy *continued*

to “collaborate with other government partners and the tourism industry to identify opportunities to grow cultural tourism in Ontario, including Francophone tourism and Indigenous-led tourism, and offer authentic and compelling visitor experiences.” In 2015, the government released its sport plan, **Game ON**, which commits the government to “seek out sport hosting opportunities that will utilize the new infrastructure built for the Pan and Parapan Am Games.”

Delivering on these commitments provides an excellent opportunity for government and the tourism industry to collaborate with culture and sport stakeholders and assets, to create unique tourism experiences. This could include engaging with interactive developers to create virtual reality experiences, packaging and promoting performing arts and sport offerings, expanding awareness of cultural and sport infrastructure in local communities, and working with Indigenous and Francophone communities to bring their stories to life in a way that engages and inspires visitors.

The tourism, culture, and sport sectors are each a major economic driver on their own, but together they are a powerhouse. This Framework is an opportunity to align efforts across these three important sectors. By linking tourism to the **Culture Strategy** and the sport plan, **Game ON**, the government is working to create the right conditions to support industry growth and promote an identifiable Ontario brand.

Growing Partnerships in Cultural Tourism

The 2015 Juno Awards presented an incredible opportunity for Cultural Tourism in Ontario, and Hamilton Halton Brant Regional Tourism Association worked with partners to leverage their resources and expertise to assist in delivering an exciting event.

The Association partnered with Hamilton's JUNO Host Committee and presented Turn It On Pop Up, a tour for music fans to hear some of Canada's impressive musicians and to get Ontario ready for the 2015 JUNO Awards. Pop-Ups were held in the Greater Toronto, Guelph, Kitchener-Waterloo and Hamilton Area and fans were admitted for free on a first come basis to these all-ages shows.

The collaborative approach by all partners made the Juno event a success, resulting in 15,000 visitors, 5,500 hotel rooms booked and \$11 million dollars in economic activity.

“The tourism, culture, and sport sectors are each a major economic driver on their own, but together they are a powerhouse.”

Building On A Strong Foundation

Tourism's impressive contribution to Ontario's economy and quality of life is due in large part to the productive working relationship between government, its agencies and industry partners. The government greatly values the contributions of provincial sector associations, Regional Tourism Organizations, Destination Marketing Organizations, operators, agencies and so many others.

Over the past decade, government and industry have worked together to ensure the right fundamentals are in place for success. A number of significant initiatives have been undertaken to reflect the changing needs of Ontario's tourism sector.

Ontario Agencies Supporting the Tourism Industry

Ontario's tourism and culture agencies and attractions promote economic growth and job creation by offering a range of recreational, cultural and entertainment programs for residents and visitors.

Agencies and attractions showcase and support Ontario's cultural diversity and creativity, as well as its history and cultural heritage, through opportunities and experiences in venues that have economic, social and historical value to communities throughout the province. These well-known and important icons include heritage sites, museums, art galleries, science centres, convention centres, historical parks and attractions.

In addition to enriching Ontario's quality of life, enhancing community pride, and protecting Ontario's heritage, provincial agencies are supporting job creation in diverse areas and contributing to economic growth. For example, in 2015-16 alone, the Ottawa Convention Centre and the Metro Convention Centre generated more than \$400 million in combined economic impact.

Ontario's Tourism and Culture Agencies and Attractions

- *Art Gallery of Ontario*
- *Fort William Historical Park*
- *Huronian Historical Park*
- *McMichael Canadian Art Collection*
- *Metro Toronto Convention Centre*
- *Niagara Parks Commission*
- *Ontario Arts Council*
- *Ontario Heritage Trust*
- *Ontario Library Service – North*
- *Ontario Media Development Corporation*
- *Ontario Place Corporation*
- *Ontario Science Centre*
- *Ontario Tourism Marketing Partnership Corporation*
- *Ontario Trillium Foundation*
- *Ottawa Convention Centre (Shaw Centre)*
- *Royal Botanical Gardens*
- *Royal Ontario Museum*
- *Science North*
- *Southern Ontario Library Service*
- *St. Lawrence Parks Commission*



Learning to cook in the Niagara Region

Ontario's agencies and attractions also help raise the international profile of the province. Among its many marketing initiatives, the Ontario Tourism Marketing Partnership Corporation operates 11 Ontario Travel Information Centres that welcome over 1 million visitors each year. The travel centres operate at high-traffic locations near borders and in Toronto.

The Regional Approach

The 2009 Discovering Ontario Report focused the government on the development of tools and industry capacity to drive change. This led to the creation of 13 tourism regions, each led by a Regional

Tourism Organization (RTO) to help improve collaboration, harmonization and communication across the industry. Since their inception, RTOs have provided leadership and worked with industry partners to spur tourism growth through strategic planning, research, product development, workforce development, investment attraction, and marketing.

Taken together, RTO-led activities have resulted in the creation or enhancement of over 470 tourism products, over 27 million website visits, over \$163 million in earned media, providing customer service training to over 9,500 participants, and over \$13 million in leveraged partnership dollars from 650 sector partners.

Investing in Ontario's Tourism Industry

Over the past decade, the ministry's Investment and Development Office has raised the profile of Ontario as an ideal destination for tourism industry investors, and has supported major investment projects in the province with a one-window business advisory approach.

“Over the past decade, government and industry have worked together to ensure the right fundamentals are in place for success.”

Building On A Strong Foundation *continued*

Building on these efforts, the government launched the Tourism Investment Attraction Strategy in 2012, which outlines how government and industry can work together to attract more foreign investment and refresh Ontario's product and experience offerings. The ministry has facilitated familiarization tours for international investors, led international investment outreach programs, and helped to secure key investments, including Ripley's Aquarium of Canada in Toronto, LEGOLAND Discovery Centre in Vaughan, Aquatarium at Tall Ships Landing in Brockville and iFLY indoor skydiving in Oakville.

The Investment Development Office also works with municipalities across the province as well as municipal associations, including the Economic Developers Council of Ontario, to promote the economic value of tourism and identify market-ready investment land sites to attract new investment.

Since its inception, the ministry has provided over \$10 million in assistance to 214 Tourism Development Fund projects supporting new product development, investment attraction and industry capacity building. The ministry has also supported more than 1,900 festivals and events with over \$155 million through the Celebrate Ontario program since 2003. Funding through these programs helps to improve the business climate and create a stronger tourism industry that is attractive to investors.

From 2009 to 2014, Celebrate Ontario recipients reported a 27 per cent increase in visitors (or an additional 8.5 million) and a 24 per cent increase in visitor spending (or an additional \$1.7 billion) due to Celebrate Ontario support. Visitor spending triggered by Celebrate Ontario funding is estimated to have generated \$282 million in provincial tax revenue and supported 22,000 jobs.

Collaborating with Federal, Provincial and Territorial Partners

The ministry has also been working with federal, provincial, and territorial (FPT) partners to develop strategies to increase the competitiveness of the tourism sector in Ontario and Canada. These efforts include improving data collection and sharing among FPT partners; better aligning marketing efforts between national, provincial, and territorial programs; and exploring other areas of interest to grow tourism through active participation in FPT committees and meetings.



Cycling in Niagara-on-the-Lake

Working With Our Partners

Beginning in the fall of 2015, the government launched an extensive dialogue with tourism stakeholders to help inform and develop the Strategic Framework for Tourism in Ontario.

Through this engagement process, stakeholders provided the government with invaluable advice on how the sector could be more successful. A number of key themes and priorities emerged that have provided the foundation for the development of the Strategic Framework. These include:

- Increased communication, coordination and partnerships between government, the tourism industry and non-traditional partners;
- A visitor-first approach to delivering tourism;
- A greater focus on clear outcomes;
- An Ontario brand and strategy to market the regionally unique, iconic and diverse experiences of Ontario;
- Increasing and promoting the province's multicultural, Indigenous and Francophone tourism offerings, which represent our rich culture and heritage; and
- Sharing tourism data and research that is timely and relevant.

As an important step towards creating the right environment to support growth and facilitate collaboration across the tourism sector, the government released *Ontario's Tourism Action Plan* containing 12 immediate actions in five priority areas:

- Product and Experience Development
- Tourism Workforce Development
- Marketing Strategically
- Advancing the Tourism Sector
- Making Evidence Based Decisions

Please see Appendix A for a full list of the Action Items.



Camping in Killarney Provincial Park

A Shared Vision For Ontario Tourism

The Strategic Framework for Tourism in Ontario is the next step in the government's commitment to ensuring the industry is best positioned for success in the global market.

Over the next five years, the Framework will serve as a tool to help guide the industry and government in adapting to an increasingly dynamic global tourism environment. It will raise the profile of Ontario's tourism sector and result in a more integrated tourism industry.

The government recognizes that international tourist arrivals around the world are expected to continue to grow by 3.3 per cent per year until 2030.⁴ The Strategic Framework will guide our focus towards future market demand and help Ontario remain competitive.

The vision and mission are a shared approach for government and industry that builds on our collective strengths. The recent growth in tourism confirms that Ontario can be successful globally, attracting new international visitors, while promoting alternatives for Ontarians looking for tourist experiences closer to home.

By working together, government and industry will create a strong and sustainable market position, develop unique visitor experiences and remove barriers to increasing visitation.

Our Vision

To position Ontario as a preferred global tourism destination of choice, renowned for the diversity of its tourism experiences, creating economic prosperity for Ontario.

Our Mission

To meet or exceed global tourism growth over a five-year period, by working across the sector to drive demand for Ontario's tourism experiences.



Walking the Edgewalk in Toronto

⁴ UNWTO. 2011. *Tourism Towards 2030: global overview*.
<http://www.e-unwto.org/doi/book/10.18111/9789284414024>

A New Way Forward

Shifting our Focus

The Strategic Framework engagement process reinforced a need for collaboration and a shift to an outcome-based approach, but also highlighted the distinct roles for both government and industry in supporting a stronger tourism sector.

The sessions highlighted areas where the government could take a leadership role to better facilitate coordination between all levels of government, industry and non-traditional partners, while industry could strive to improve communication, collaboration and partnerships within and across the tourism sector.

In order to succeed, government and industry partners must work collaboratively towards common outcomes and objectives to bring together the collective knowledge and expertise of our tourism industry.

A greater focus must be given to targeting the needs of the traveller, from the moment they plan their visit, to their arrival and until their return home. Such collaboration will inform, set and support priorities to drive visitation, create future market demand and remove barriers to our success.

Moving forward, four key shared outcomes will guide how government and industry work together to encourage the sharing of expertise and resources, while driving visitation and tourism spending.



Dogsledding in Algonquin Park

1. Leverage our Resources

Government and industry must ensure that their collective efforts are working towards making the tourism sector globally competitive. Adopting the shared vision and mission, establishing roles and responsibilities, utilizing and sharing existing expertise and resources will enable industry partners to work more collaboratively and effectively throughout the entire tourism cycle.

Building Capacity for Market Demand

Tourism Northern Ontario and Explorers' Edge came together with the Governments of Ontario and Canada to develop Tourism Excellence North (TEN), a tourism development program for Northern Ontario.

TEN is a suite of self-assessment tools, group learning workshops and personalized coaching opportunities designed to strengthen the ability of tourism operators, communities and destinations to enhance and develop new experiences, adapt to changes in the marketplace, and ensure that their product is at the level of current customer expectations.

By using TEN, tourism operators, communities and destinations improve the quality of their products and enhance visitor experience, resulting in increased revenues. Participants have noted immediate improvement in their business, and expect further success in the future.

2. Convert the Market

All strategic marketing efforts must lead to measurable market conversions. This can mean 'heads in beds' for accommodations, the sale of admissions for attractions, the sale of transportation tickets, and so much more. Focus must be directed towards aligning marketing strategies and tactics that create a sense of urgency that compels the consumer to take action and visit Ontario.

3. Generate Future Market Demand

Product and experience development must be focused on anticipating the needs of the visitor. Each tourism region in Ontario has its own unique characteristics, participants and key considerations that determine the markets they should target. Government and industry will work together to increase the industry's skills capacity to ensure strong business planning in all aspects of industry growth. Using research and business intelligence will help ensure priorities and investments receive the greatest return.

4. Define and Reduce Barriers to Economic Prosperity

Together, we must clearly identify the critical barriers in each region of the province such as visitor access, labour issues, business obstacles and costs that impede the growth of the industry. There is a need to work collaboratively to set priorities and remove these barriers. Collectively, government and industry must ensure the economic value of tourism is understood and tourism activities are supported at the local, regional, provincial and national level.

Leading Future Growth Together

Through collaboration and consideration, a new approach, vision, mission and shared outcomes have been identified to ensure that Ontario's tourism sector takes advantage of opportunities for growth.

The government has taken a strong leadership role in developing the Strategic Framework, outlining how government and industry will work together, and applying the lens of the Framework to *Ontario's Tourism Action Plan*.

The Strategic Framework advances four priority areas, identified through the industry engagement process. These priorities will increase collaboration and communication with the industry by aligning marketing efforts, leveraging the regional tourism approach, developing the tourism workforce and improving the business climate in Ontario. Industry partners are encouraged to demonstrate leadership within their region or in the province by applying the lens of the Strategic Framework to their activities, and developing partnerships with other industry members and municipalities.

Marketing Strategically

Ontario tourism products and experiences are rich and diverse – from iconic destinations, to vibrant urban centres, to unique hidden gems. While Ontario tourism is being promoted by many marketing entities at different levels, the government heard there is a need to align marketing efforts to maximize the investment.

“Through collaboration and consideration, a new approach, vision, mission and shared outcomes have been identified to ensure that Ontario's tourism sector takes advantage of opportunities for growth.”

Driving Target Markets Together

Seeing an opportunity to drive overnight U.S. visitor traffic by air travel, Air Canada, Tourism Toronto, the Ontario Tourism Marketing Partnership Corporation, and Toronto Pearson International Airport developed the successful US Toronto Escapes Partnership Program.

The initiative is a fully integrated, online promotional program that encourages travel to Toronto from identified major markets in the United States. The partnership program features several avenues to attract U.S. customers to the Toronto Escapes website where they can search for available Air Canada flights and available Toronto region accommodations and attractions.

The project was an overwhelming success, resulting in increased visitation.

Leading Future Growth Together *continued*

The ministry has been engaging across government and with industry partners to assess the current operating environment and potential areas for improvement. Several key themes emerged that point towards the ministry and industry moving forward together:

- Building more alignment and efficiencies in Ontario's tourism marketing system;
- Promoting a meaningful Ontario brand with consistent messaging;
- Ensuring quality tourism products are offered to the right markets at the right time; and
- Providing common, realistic and meaningful performance metrics.

Building more alignment and efficiencies in Ontario's tourism marketing system

Currently, the Ontario Tourism Marketing Partnership Corporation (OTMPC) is mandated to lead the marketing of Ontario as a travel destination, nationally and internationally. OTMPC partners its efforts with stakeholders at the federal, provincial, regional, municipal, and industry level to deliver direct consumer campaigns, digital strategies and strategic partnership initiatives that drive visitation. OTMPC has worked closely to develop trade and media relationships in priority countries, including the United Kingdom, France and Germany

Supporting Market Ready Products and Experiences

The Ontario Tourism Marketing Partnership Corporation (OTMPC) has recently launched two programs to assist with identifying tourism products and improving the list of experiences available for international markets.

Ontario Signature Experiences Program

Launched in 2013, the program is designed to help regions and operators develop iconic, world-class tourism products that could qualify for priority promotional support in international markets from Destination Canada's Signature Experience Collection. There are currently 59 signature experiences in Ontario being promoted by Destination Canada and OTMPC.

Export Readiness Webinars

This program helps prepare Ontario tourism stakeholders to meet the needs of international travelers when they arrive in Ontario; and to be "export ready" and successfully sell their experiences to international markets.

in Europe; Brazil, Mexico and the United States in the Americas; and China, Japan, South Korea and India in Asia.

In addition, since the establishment of the RTOs, the industry has been encouraged to improve collaboration and harmonize

Leading Future Growth Together *continued*

efforts at the regional level. Ontario's self-managed regions have a strong understanding of local and regional tourism products and are best positioned to identify their unique selling proposals and participate in provincial marketing efforts, especially in domestic and internationally focused campaigns.

The government and industry must work to leverage resources and optimize investments. The ministry, government agencies, government funded partners, and industry must collaborate to clearly define and communicate roles and responsibilities, encourage integrated decision-making, and build new partnerships in developing and implementing marketing strategies.

Building on successful sector committees, OTMPC will be encouraged to continue to develop and enhance marketing strategies for each of their key geographic source markets in a coordinated way, focusing discussions with Ontario, and other provincial and national partners that share an interest in that market. OTMPC is encouraged to seek out opportunities to align with other provincial and national partners and initiatives, like Destination Canada's NorthStar 22, which aims to develop a multi-year collaborative plan for tourism in Canada.

Promoting a meaningful Ontario brand with consistent messaging

To increase domestic and international tourists and tourism expenditures, OTMPC

has taken a research-based approach to develop the Ontario brand, "One Discovery Leads to Another." Recognizing that every provincial region is characterized by its own unique style and range of experiences, the Ontario brand brings together the diverse and dynamic tourism offerings across the province and the fun and ease by which tourists can explore it.

OTMPC's logo "Yours to Discover" and the recently developed "Where Am I?" brand platform are extensions of the Ontario brand.

However, during the engagement sessions, the government heard that Ontario needs to improve brand consistency, and reduce brand clutter to be more effective in today's globally competitive industry.

Creating Tools to Support an Ontario Brand

The Ontario Tourism Marketing Partnership Corporation has recently launched Image Ontario - the official image and video gallery for Tourism in Ontario for the purposes of sharing materials that promote travel to and within Ontario.

High resolution images and HD videos are available for free use in promotional materials. The new Image Ontario includes enhanced search capabilities, increased download options, and a preview for quick sample layout.

Leading Future Growth Together *continued*

The government will work with industry to explore opportunities to leverage the Ontario brand and OTMPC's current "Where Am I?" brand platform.

Ensuring quality tourism products are offered to the right markets at the right time

Success in the competitive global tourism marketplace requires a shared understanding of Ontario's key regions and markets, brand positioning, and a product-ready approach that drives consumer demand.

As noted in the Tourism Action Plan, the government has made many commitments to better promote Ontario's diverse experiences and attract more travellers. This includes developing new lead generation strategies and a targeted outreach approach, strategically targeting new investment, and working with economic development partners to build local capacity for tourism.

As committed to in the Tourism Action Plan, the ministry is continuing to work with

"The ministry heard that Ontario needs to improve brand consistency, and reduce brand clutter to be more effective in today's globally competitive tourism industry."



Taking pictures along the St. Lawrence River in Rockport, 1000 Islands

Creating Products that Generate Demand

St. Lawrence Parks Commission's Pumpkinferno, an outdoor exhibit of carved pumpkins, continues to attract visitors to Upper Canada Village in Morrisburg. Pumpkinferno is a unique blend of artistry, imagination and ingenuity featuring 30 exhibits created from 7,000 intricately hand-crafted artificial pumpkins lit against the night sky and backdrop of Upper Canada Village. Highlights of new exhibits in 2016 included: Dragon's Lantern Lair, Jailhouse Rock featuring 1950s pop icons including Elvis and Marilyn Monroe; and Upper Canada Village People.

The event earned the "Best New Event in Ontario" designation by Festival and Events Ontario, "Tourism Event of the Year" by the Tourism Industry Association of Ontario and "New Company of the Year" by Ottawa Tourism.

Leading Future Growth Together *continued*

Indigenous and Francophone leaders to enhance the development of tourism experiences reflecting the historical and current contributions to Ontario's culture. Since the launch of the Action Plan, the ministry and OTMPC provided support for the development and marketing of Indigenous and Franco-Ontarian tourism assets for domestic and international visitors, including the Champlain Scenic Route. The ministry has also identified opportunities to advance multicultural tourism, and will continue to work with industry partners to make those products market-ready. Ontario's cultural diversity enhances the experience visitors have when exploring the province.

The ministry will work with OTMPC and tourism industry partners to determine Ontario's priority tourism markets and key research tools for consumer market segmentation, and better align funding programs to help reach and attract new visitors from those targeted markets. Government research efforts (e.g. Destination Canada's Explorer Quotient (EQ) Segments, OTMPC's consumer segment research, Destination Canada's Global Watch Reports) will contribute to the strategy development, planning and shared actions.

Based on market intelligence, the ministry will collaborate across government and with industry to identify market-ready products and experiences that showcase Ontario's recent investments and unique selling propositions. The ministry will also work with industry partners to find opportunities for

Enhancing the Tourism Experience

In July 2016, the Niagara Parks Commission and WildPlay Niagara Falls officially opened the WildPlay's MistRider Zipline to the public.

Designed to enhance the overall tourism offerings of Niagara and of Niagara Parks, WildPlay's MistRider Zipline to the Falls consists of four parallel lines that take guests on a 670-metre (2,200 foot) long scenic ride from Niagara Parks Grand View Marketplace to the historic Ontario Power Company building located within the Niagara Gorge.

This exciting new tourism product is enhancing the tourist experience in Niagara and helping to attract more and more visitors to the region.

even greater alignment and efficiencies in Ontario's tourism marketing system.

The government, OTMPC and other government agencies, RTOs, Destination Marketing Organizations (DMOs), sector associations, and industry partners all have a role to play to align resources, ensure consistency and increase awareness of compelling visitor experiences and iconic assets across Ontario. To support this approach, government and industry investment should be strategic and drawn from objective product and research analysis, market trends and competitive analysis that presents the most compelling experiences to targeted consumers.

Leading Future Growth Together *continued*

Market-Focused Approach

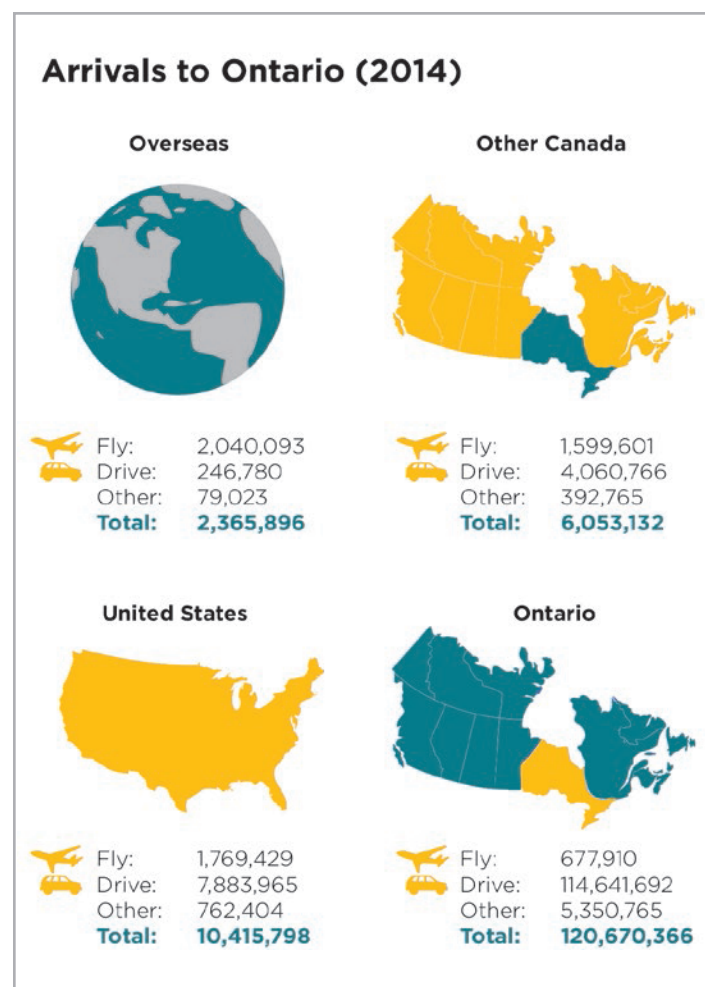
Industry members are encouraged to approach marketing and product development in a coordinated way. As a starting point, discussions can be directed towards key focus areas and should include industry members who share that focus. For example, key markets include:

- International and overseas markets;
- North American long haul market (i.e. United States and Canada non-border states and provinces);
- North American short haul market (i.e. United States and Canada border states and provinces); and the
- Ontario market.

In addition, the industry is encouraged to work with their regional and local partners to further define where shared responsibility and co-investment are the most productive, where overlap exists, and how to explore and develop new opportunities. Tourism business and industry partners should continue to work within and across regional boundaries to develop and improve experiences and make them available to key target markets.

Providing common, realistic and meaningful performance metrics

The government, OTMPC, RTOs and DMOs will review current marketing performance metrics to adopt standardized, effective, measurable and meaningful metrics with established industry benchmarks. This will complement a similar national endeavour now being undertaken by Destination Canada with all of Canada's provincial and territorial marketing organizations.



Leveraging the Regional Tourism Approach

Strong partnerships and a coordinated approach are vital to the future long-term growth of tourism across the province. RTOs currently engage with all tourism partners including sector associations, municipalities, government agencies, DMOs, operators and other organizations on matters of mutual interest. Given their leadership role in the industry, RTOs can be seen as enablers and focal points for change in tourism throughout the province.

Stakeholder feedback indicated that partnerships between RTOs and the industry

have been positive and helped advance tourism in Ontario. But more work can be done.

The ministry will work with the RTOs and other partners to maximize the return on investment by improving alignment of shared or common activities. To achieve this, the ministry will ensure that RTOs have access to tools that will enable more partnerships and collaboration with industry, while at the same time respecting the important contribution and role that each partner has within the industry.

The ministry will explore changes to the mandates of the RTOs and program policies to support a holistic approach to tourism in each region to further solidify their leadership role in the regions.

Review the Regional Tourism Organization Funding Formula

RTOs have regularly expressed the need to update the funding formula with more recent data and to include additional data points that better reflect their region's performance. The ministry will work with the RTOs to determine which metrics could be better used to obtain a more recent, relevant, and complete image of a region's performance. A blended formula that uses a variety of data points would take into account the uniqueness of each RTO, and demonstrate an equitable distribution of funds.

Leveraging Resources for Success

There are few sweet treats more quintessentially Canadian than a butter tart, and Ontario has some of the best tarts in the country. But how do you show visitors all the award-winning bakeries in your region? Kawarthas Northumberland had the answer.

Working with local bakeries across the region, Kawarthas Northumberland has developed a self-guided tour for visitors to travel from Port Hope to Brighton and Kirkland to Apsley to sample butter tart after butter tart. An interactive website includes a trip planner and maps for visits to over 50 bakeries. Every year more bakeries join the regional tour, demonstrating unique partnerships and the importance of leveraging existing resources to create a memorable experience.

Leading Future Growth Together *continued*

These metrics are currently being analysed by the ministry to determine what changes, if any, should be implemented regarding the funding formula. Several factors are taken into account when developing and implementing such changes, including flexibility, equity, and sector stability. The ministry will also consider other program changes to increase the efficiency and effectiveness of RTO operations.

A Holistic Approach to Tourism

Currently, the RTOs focus a significant portion of their activities on marketing. While marketing is integral to attracting visitors to the regions, it is also important to ensure future growth by placing additional emphasis on developing product, attracting new investment, and having a world-class workforce.

There is an opportunity to optimize the current investment in marketing activities across the province by employing an integrated approach and enhancing alignment of efforts among the RTOs, DMOs, sector associations, and OTMPC. This will build upon the strong relationships that already exist among these entities.

Collaborative decision-making and the leveraging of available resources will allow for better alignment and focus on other important areas. Better alignment of marketing activities would allow RTOs more flexibility to invest further in product development, workforce development, and investment attraction.



Paddling at the Madawaska Kanu Centre in Barry's Bay

Build more partnership opportunities to encourage tourism development

To encourage strategic partnerships, RTOs are provided with dedicated funding for the Regional Tourism Organization Partnership Program. Under this program, RTOs provide matching funding for eligible partners at a

Leading Future Growth Together *continued*

1:1 ratio for initiatives that contribute to increasing tourism in the region.

Stakeholder engagement sessions clearly indicated that while partnership projects are inventive, strategic, and beneficial to the regions, certain program restrictions could be a burden, limiting partnership opportunities.

The ministry will explore program changes to allow greater flexibility for the RTOs to expand their partnerships. Program changes could include allowing partners to co-lead the management of projects and procurement based on their capacity and expertise.

To ensure future growth in the sector, the ministry will consider incentivizing the Partnership Program to encourage more focus and investment in product development, workforce development and investment attraction projects.

Increase opportunities for collaboration to enhance tourism products

Stakeholders noted that there is a lack of resources and opportunities for small operators to partner with the RTOs to ensure tourism products are market ready and meet visitor expectations. The ministry will explore opportunities to work with the RTOs to design and implement a pilot program with dedicated funding aimed at enhancing tourism products to ensure market readiness.

These types of concrete changes would help the RTOs strengthen their leadership role in the regions to enhance the economic

impact of tourism on local economies. It would also allow the RTOs to continue their commitment to a collaborative approach to tourism in Ontario, and ensure that all industry partners are working together while striving for the same goals.

Measure progress through outcome-focused and meaningful performance metrics

RTOs are responsible for tracking their progress using a series of performance indicators. These have been instrumental in measuring progress. Moving forward, the ministry will work with the RTOs to review and develop performance measures that are outcome-focussed, meaningful and measurable. The performance measures will be research-based and aligned with established industry standards.

Improving the Tourism Workforce

In Ontario, 180,000 or 13 per cent of businesses are involved in tourism, and over 90 per cent of these are small businesses with fewer than 20 employees.

The tourism industry in Ontario touches all communities and offers excellent full-time, life long career opportunities in a wide variety of skilled and technical sectors. A tourism career spans the employment spectrum offering management opportunities from finance to business administration. This includes a wide variety of skilled management positions in food and beverage, retail, arts and culture, sports and recreation, and heritage to name a few.

Leading Future Growth Together *continued*

In addition, tourism is the largest employer of youth in the province. With over a third of its employees aged 15-24, Ontario is building the foundation and shaping the work ethics of the future tourism workforce. Compared to other industries, the tourism industry employs a higher-than-average proportion of females and young people. Tourism also employs a significant number of newcomers to Ontario with 8 per cent of all landed immigrants employed in the tourism industry in 2012. Many people who launch their tourism careers in travel information centres or industries that serve tourism, eventually grow into the leaders that define and expand the industry.

Still, the ministry recognizes that many employers are facing significant labour shortages for entry-level or seasonal positions, while others are struggling to retain employees in high-skilled and management positions. Stakeholders highlighted the need to coordinate with other ministries and the tourism industry to identify and address workforce gaps and needs.

Through the Action Plan, the ministry initiated discussions with other ministries and industry partners on an inventory of workforce development activities across Ontario. The ministry will continue to identify opportunities to address the unique workforce needs of the sector, and work collaboratively with industry to share its findings.

The government also recognizes the valuable work that Ontario's colleges and universities

are undertaking to prepare young professionals for the tourism workforce and meet the long-term labour needs of the sector.



Snowmobiling in Sault Ste. Marie

In 2014-15, student enrolment in the hospitality, culinary and tourism programs in Ontario colleges remained constant at around 7,500 students. However, the number of programs offered from 2012-13 to 2014-15 increased by 17.5 per cent from 88 to 103. At the same time, graduates who work for cultural and sport organizations are also indirectly connecting to the tourism labour force.

The ministry is encouraged by the potential to better connect colleges to opportunities in the industry and will continue working with its partners to address barriers to attracting more tourism-focused career seekers.

Leading Future Growth Together *continued*

As outlined in the Tourism Action Plan, the ministry will work with TIAO to support the next phase of the ***Promoting Tourism as a Career*** campaign to encourage greater enrolment in tourism-focused training and courses.

The ministry welcomes and encourages leadership by the industry in the area of workforce development. Industry partners are encouraged to focus industry-wide consultations on workforce development, including recruitment, retention, training and leadership to address tourism labour gaps.

Improving the Business Climate

The Tourism Action Plan also outlined the ministry's commitment to improve the business climate for tourism operators through collaboration with multiple ministries and industry partners. This work will identify business challenges facing the sector and find solutions. During the engagement sessions, stakeholders emphasized the need to modernize regulatory requirements through transparency of government planning and processes, and streamlining administrative processes within the ministry and across government to enable an efficient business environment.

Since June, this collaboration has proven successful with the inclusion of tourism as a newly added sector to the Red Tape Challenge as part of the government's Business Growth Initiative. The initiative is an



Taking a ride on the Whirlpool Aero Car across Great Gorge along the Niagara River

economic strategy working across government over the next five years to leverage Ontario's workforce, remove regulatory burdens and strengthen the province's global competitiveness. The Red Tape Challenge is a multi-year public engagement exercise to help identify business regulations that need to be updated, improved or eliminated. Adding tourism to the Red Tape Challenge demonstrates the government, industry and the province as a whole recognize the economic importance of the tourism sector.

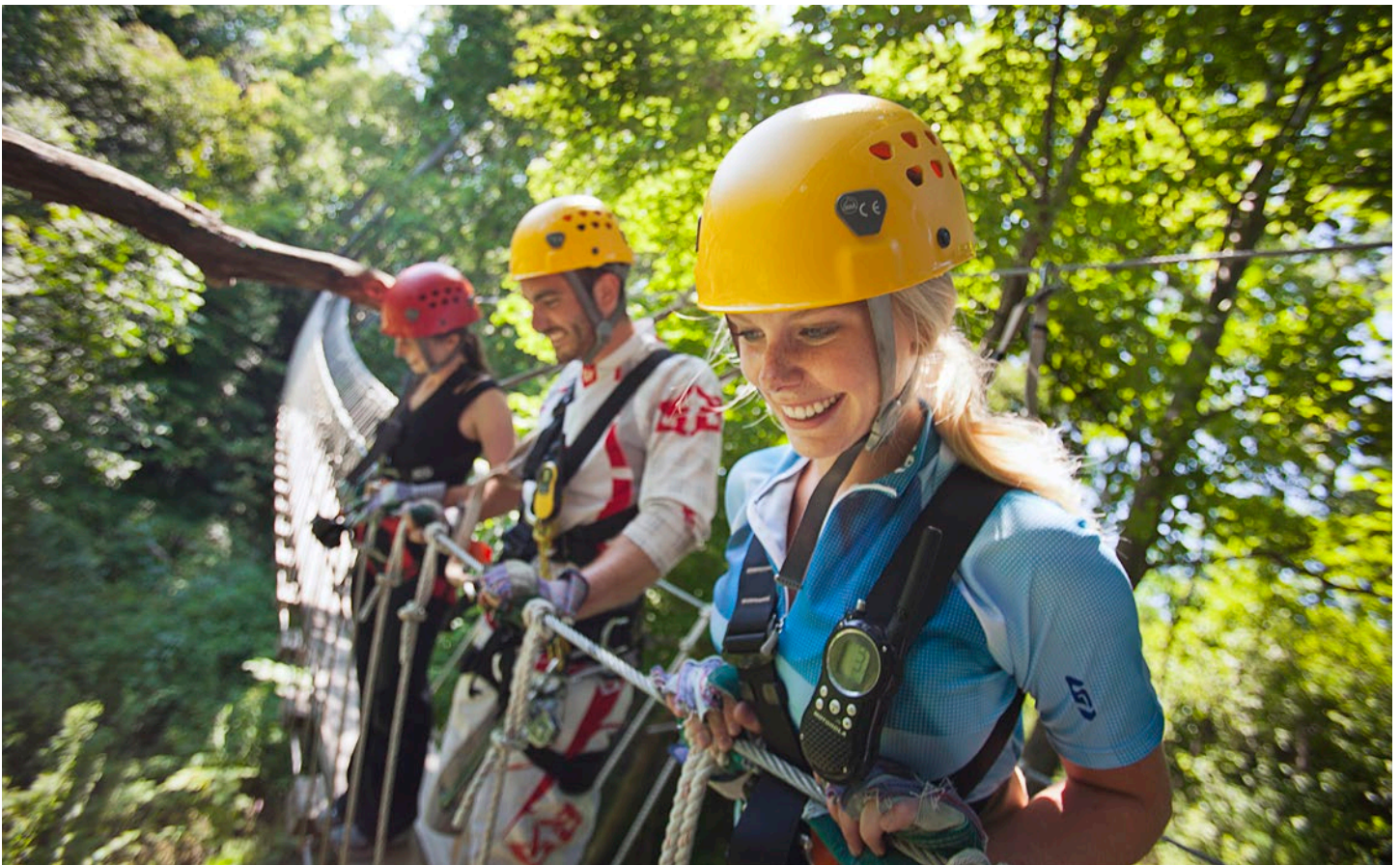
The government encourages TIAO to continue leading the work in this area, including convening working group meetings with industry representatives

Leading Future Growth Together *continued*

and identifying specific regulatory burdens in the tourism sector to support the Red Tape Challenge.

The ministry will also explore opportunities to review existing legislation, like the *Innkeepers Act* and the *Hotel Registration of Guests Act*, which no longer reflects the modern day tourism industry. These acts have not been amended since the early-to-mid twentieth century. In recent years, stakeholders have referenced both Acts in various reports, and questioned their usefulness in the modern tourism context.

Travel behaviour continues to change and the ministry recognizes that home sharing has the potential to address the changing needs of consumers and the experiences they are seeking. While there is a potential to increase tourism and benefit local economies, to better understand the implications of home sharing, the government will continue to consult with municipalities, industry stakeholders and the public on the development of an integrated strategy for the sharing economy and home sharing in Ontario.



Ziplining in Norfolk County

Measuring Success

The ministry will strive to collectively achieve our mission – to meet or exceed global industry growth over a five-year period, which the World Tourism Organization estimates will grow by an average of 3.3 percent per year until 2030.

The tourism industry must ensure that it captures its share of that growth and focuses on bringing international visitors to Ontario. The ministry recognizes that Ontario's domestic market continues to be strong, and we will continue to monitor and build on growth from domestic travellers. However, there is an opportunity to target international visitors in order to capture more of the global tourism growth being experienced around the world. International

visitors from further source markets stay longer, spend more, and become great ambassadors for Ontario and Canada.

The Ministry of Tourism, Culture and Sport recognizes the importance of making sound business decisions that are informed by timely and accurate research and data. Data allows governments and the industry to understand the economic impact of the tourism sector and measure the success of their contributions to the sector.

To ensure there is progress towards achieving our mission and objectives, we will continue to monitor and evaluate our efforts and make necessary adjustments. As the tourism industry begins to shift its approach to one of improved collaboration and outcomes, it will enable the sector to more effectively evaluate our efforts and adapt to global change.

With the release of the current 2014 tourism data and the expected release of 2015 data in 2017, the ministry is providing updated information that is more relevant for industry to better measure their efforts. The creation of a Tourism Research Community of Practice will help to share best practices, new tourism data and offer advice on key performance indicators and targets to ensure they too are keeping pace with global growth. The ministry is also working with OTMPC, Destination Canada and Statistics Canada to improve the collection and dissemination of relevant data that will enhance tourism business decisions.



Taking in the sights at Blue Mountain Village in Collingwood

Looking Ahead

The Strategic Framework is the next step to support the future growth and success of Ontario's tourism sector. It will improve the competitiveness of the industry and position Ontario as a destination of choice for both visitors and investors.

Taken together, the activities within *Ontario's Tourism Action Plan* and the vision of the Strategic Framework for Tourism Ontario will position Ontario's tourism industry for success. Over the next five years, we will continue to monitor our efforts and

make adjustments to our strategies and programs to ensure that the sector is making progress and staying in step with global trends. The integration of sport and cultural product more deliberately into the overall tourism product will further enhance the visitor experience.

The ministry will continue to work with its tourism industry partners to seek opportunities for increased growth and ensure the full potential of Ontario's vibrant tourism industry can be realized.



Celebrating Canada Day at Parliament Hill in Ottawa

Appendix A - *Tourism Action Plan*

In the Tourism Action Plan released on June 9, 2016, the ministry committed to the following actions.

Product Development and Experience

In response to industry feedback on a need to develop authentic, market-ready products and experiences that incorporate a 'visitor first' philosophy, the ministry committed to:

1. Working across government and with partners to develop new lead-generation strategies and a targeted global outreach approach the Ontario's Investment Strategy to sell Ontario as a place to invest in tourism;
2. Using results from the recently completed Attraction Study to strengthen Ontario's value proposition and strategically target new investment; and
3. Working with the economic development community and across government to explore a business retention and expansion service for the tourism industry.

Tourism Workforce Development

In response to industry feedback that stressed the importance of maximizing the career potential of the tourism industry and facilitating entry of under-represented groups, the ministry committed to:

4. Working with the Tourism Industry Association of Ontario (TIAO) to support the next phase of the Promoting Tourism as a Career campaign; and encouraging the Tourism Industry Association and other stakeholders to continue working together to implement industry recommendations from the Ontario Workforce Development Strategy.

Marketing Strategically

In response to industry feedback on a need to develop authentic, market-ready products and experiences that incorporate a 'visitor first' philosophy, the ministry committed to:

5. Continued engagement with stakeholders to encourage marketing decisions are made in a collaborative manner to enhance consistency of branding and messaging, and help avoid duplication; and continuing to support the work of Destination Canada in the Connecting America campaign, to maximize the reach of the Ontario brand.

Appendix A - *Tourism Action Plan* continued

Advancing the Tourism Sector

In response to feedback underlining the importance for all levels of government, including local communities, to recognize tourism as an economic driver, the ministry committed to promoting awareness of the economic and social benefits of tourism and encouraging a whole-of-government approach to advancing the tourism sector through the following actions:

6. Hosting an annual Minister's Forum, in different regions of the province, that will include tourism industry leaders, operators, and stakeholders representing a range of subsectors in the industry, as well as the province's diverse regions.
7. Undertaking a review of current ministry funding programs (including, Celebrate Ontario - Festival and Event program, the Tourism Development Fund and the Regional Tourism Organization program) with a goal of streamlining applications, focusing on results, and improving alignment to better support communities across Ontario.
8. Collaborating across government and with industry partners to identify opportunities to advance multicultural, Francophone and Indigenous-led tourism in Ontario; and evaluating options that assess market readiness, capacity building and an authentic promotion of both past and current cultural connections, including development on the Route Champlain and supporting the next phase of the Aboriginal Tourism 2020 strategy.
9. Working across government to improve the regulatory environment for the tourism sector. To support this work, the ministry committed to convening focused discussions with industry partners to prioritize business challenges facing the sector. It also committed to working across government to improve the business climate for the tourism industry. This includes working with the Ministry of Economic Development and Growth's Open for Business Team to look for opportunities to address the industry's regulatory burdens.

Making Evidence Based-Decisions

In response to Industry feedback that emphasized the importance of receiving timely and relevant data in order to make better informed business decisions, the ministry committed to:

10. Partnering with government departments across Canada to encourage the sharing of tools and information relating to tourism data collection, evaluation and modelling; and partnering with provinces, territories and Destination Canada to pilot a new survey to collect data from international travellers entering Canada through landports and smaller airports;
11. Facilitating a tourism research community of practice to increase access to and understanding of tourism related data; and
12. Updating the Tourism Regional Economic Impact Model (TREIM) platform to enhance the user experience and enable a more efficient process for updating information.