

DESTINATION ONTARIO

An Agency of the Government of Ontario

BUSINESS **PLAN** *2026-2027*

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TABLE OF CONTENTS	PAGE
Executive Summary	3
Corporate Overview	
• Mandate	4
• Strategic Plan	4
• Response to Ministerial/Agency Direction	5
• Organizational Governance and Structure	6
Tourism Outlook	11
Implementation Plans	13
• Domestic Marketing	14
• Ontario Marketing	14
• Canada Marketing	14
• U.S. Marketing	15
• Northern Marketing	16
• International Marketing	16
Consumer Engagement	19
Industry Engagement	21
Performance Measures	25
Workforce Planning & Budget	28
• Human Resources Strategy	28
• Financial Budget	31
Operational Considerations	33
• Artificial Intelligence (AI) & Digital Transformation	36
• Risk Identification, Assessment and Mitigation Strategies	37

EXECUTIVE SUMMARY

Destination Ontario's 2026-27 Business Plan builds on the momentum of Ontario's tourism sector rebound and positions the province for sustained, long-term growth in an increasingly competitive global environment. Despite continued global geopolitical volatility, rising tariffs, and persistent inflationary pressures, tourism demand in Ontario remains resilient and consumer interest in domestic travel continues to trend favourably. Ontario is well positioned to capture both domestic and international tourism growth aligned to government priorities.

Destination Ontario will continue to focus on delivering value for money and strong return on investment through evidence-based marketing, targeted market prioritization, and strategic partnerships. Guided by the 2024-27 Strategic Playbook, Destination Ontario will execute high-impact marketing activities across key domestic, U.S. drive markets, and priority international markets that offer the strongest potential return to the province.

In 2026, the FIFA World Cup represents a once-in-a-generation opportunity to elevate global attention on Ontario. Destination Ontario will continue to work closely with the Ministry of Tourism, Culture and Gaming (MTCG), the Ministry of Sport, Destination Toronto and FIFA Canada to leverage this major moment to drive increased visitation and visitor spending. Destination Ontario will invite the world to experience Ontario as a place to visit, explore and return to through the Ontario Campus at FIFA Fan Fest.

This plan also recognizes that bold marketing initiatives rooted in Ontario's unique storytelling deliver results. The We Stand campaign was a significant success and demonstrated the power of unifying narrative platforms that resonate emotionally, culturally and commercially. Where aligned and appropriate, Destination Ontario will continue to collaborate with the Ministry to identify opportunities to deliver similar campaigns that elevate Ontario's voice, strengthen partnerships, and grow the tourism economy.

Throughout 2026-27, Destination Ontario will remain committed to financial accountability, data-driven decision making, responsible management of public resources, and advancing modernization through digital service improvements. The agency will continue to execute in alignment with the 2026-27 Minister's Letter of Direction and ensure transparency through ongoing performance reporting, strong governance practices, and active risk management.

By leveraging partnership alignment, strategic prioritization, and adaptive marketing approaches, Destination Ontario will contribute to increase visitation, incremental tourism spending, and strengthened industry competitiveness - supporting a thriving tourism sector that drives economic prosperity for the Province of Ontario.

MANDATE

Destination Ontario is governed by Ontario Regulation 618/98 made under the *Development Corporations Act*. Its mandate, as provided for in the regulation, is:

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

Vision

To position Ontario as a preferred global destination.

Mission

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

STRATEGIC PLAN

Destination Ontario's 2024-2027 strategic plan, also known as the Strategic Playbook, provides a three-year roadmap for the organization. The Playbook is aligned with the 2026-27 Letter of Direction by the Minister and adheres to the Government Priorities for Provincial Board-Governed Agencies 2026-27.

The strategic plan encompasses the following key pillars and priorities:

1) Making Strategic Investments

Evidence-based marketing decisions that drive return on investment and contribute to the vitality of the Ontario tourism economy.

2) Aligning Outcomes Through Strategic Partnerships

Driving value and alignment through partnership programs with industry, private sector and government partners to achieve common business outcomes.

3) Advancing Corporate Leadership

Building our presence in the Ontario tourism industry through active engagement and communications that offer learnings, best practices, and expertise to support our collective modernization and growth.

4) Levelling Up

Continuously improving our own organizational capacity to be an effective marketer, trusted partner, and public resource.

2026-27 Letter of Direction:

The government has set out the following priorities specific to Destination Ontario, via the 2026-27 Letter of Direction:

1. Continue to support government priorities related to growing domestic and international tourism across Ontario in response to the current geopolitical climate with emphasis in the Niagara region.
2. Continue to collaborate with industry stakeholders to promote Ontario as a preferred travel destination, focusing on markets that generate a strong return on investment.
3. Continue to grow and generate positive media engagement and coverage that highlights the province's tourism and attraction appeal.
4. Continue to work with the ministry to implement outstanding recommendations of the 2023 Value-For-Money Audit: Tourism Support Programs, conducted by the Auditor General of Ontario.

RESPONSE TO MINISTERIAL/AGENCY DIRECTION

Destination Ontario is fully committed to aligning its strategic objectives, operations, and initiatives with the priorities and expectations outlined in the government's 2026-27 Letter of Direction. We will ensure that our efforts are focused on protecting Ontario, delivering better services, and driving innovation & Value for Money for the people of Ontario and adhere to government policies and directives.

Our business plan reflects how Destination Ontario will meet government priorities by:

- Aligning Destination Ontario's goals, objectives, and strategic direction with government priorities, with progress reported through the annual report and communicated to the ministry in a transparent and accountable manner.
- Supporting the **Protect Ontario** commitment by strengthening domestic partnerships, prioritizing Ontario and Canadian procurement, and promoting economic resilience during ongoing economic uncertainty.
- Delivering better, user-centred services by simplifying interactions, improving client satisfaction, and expanding and optimizing digital service offerings.
- Driving innovation, efficiency, and cost savings through the use of AI, advanced technologies, and lean operational approaches to reduce red tape and bureaucracy.
- Ensuring strong stewardship of public resources by operating within approved financial allocations, supported by accurate financial reporting, internal controls, and proactive fraud management.

Destination Ontario will continue to implement the recommendations of the 2023 Value-For-Money Audit, collaborate with stakeholders to promote Ontario as a premier travel destination, and support initiatives to grow international tourism, particularly in high-return markets like the Niagara region.

By aligning with these priorities, Destination Ontario aims to fulfill its mandate while contributing to the broader goals of the Government of Ontario. Destination Ontario will regularly monitor progress and achievements and report on same through robust, transparent and accountable quarterly and annual reporting

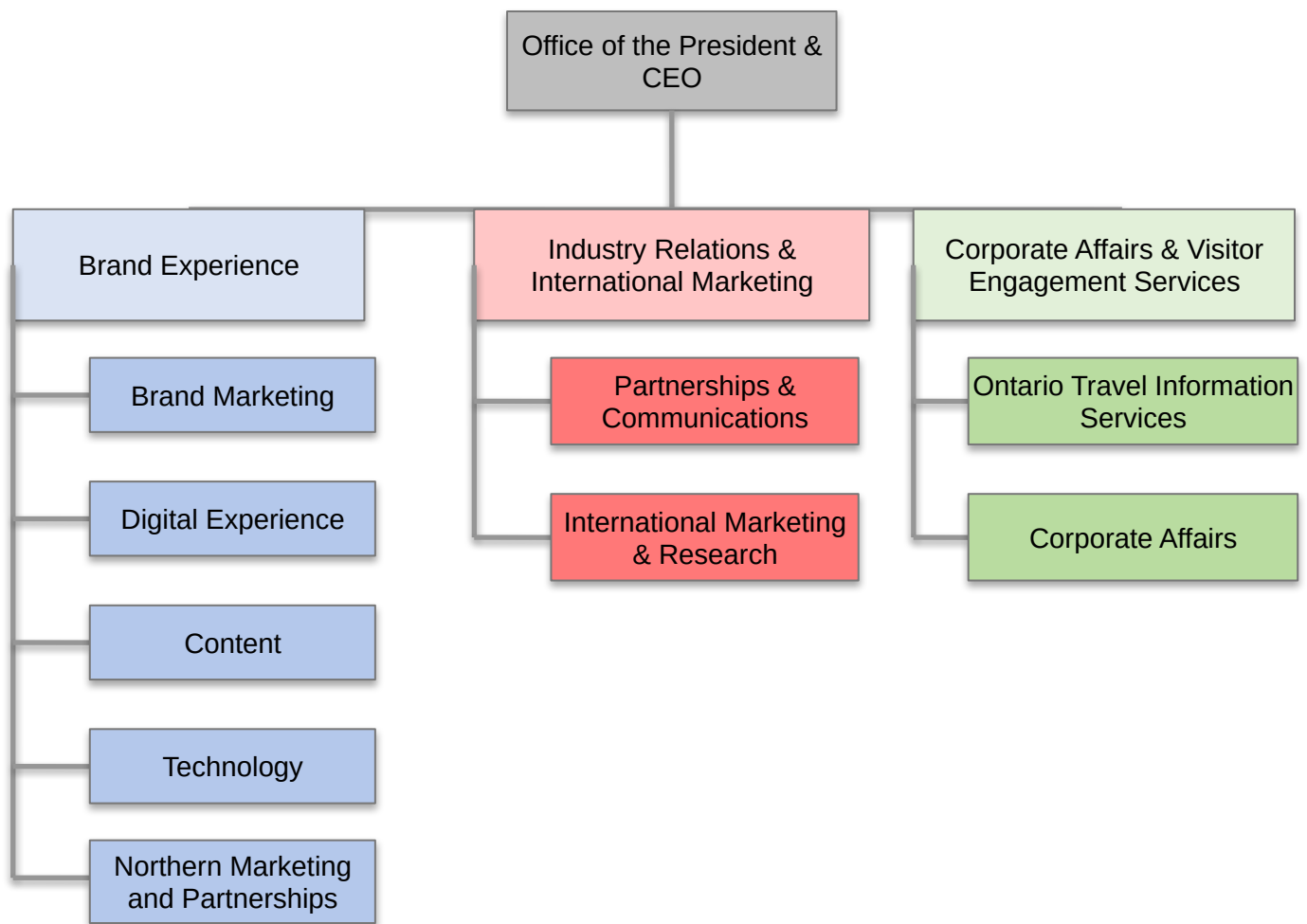
ORGANIZATIONAL GOVERNANCE AND STRUCTURE

As an agency of the Government of Ontario, Destination Ontario is governed by a board of directors comprised of business leaders and based on recommendations from the Minister of Tourism, Culture and Gaming. Board members are public appointments by the Ontario Lieutenant Governor in Council. Destination Ontario staff will continue to work closely with the board to ensure they have the necessary briefing materials and information to help them provide informed strategic guidance and direction on key decisions.

Destination Ontario is a dynamic organization that collaborates across all areas of the organization to deliver on its mandate of positioning Ontario as a renowned tourism destination while fostering economic growth for tourism businesses. In 2025-26, Destination Ontario re-organized and re-named key business areas to reflect a revised structure and better align with our mission, mandate and business activities. Our structure includes the following key areas: Office of the President & CEO; Brand Experience; Industry Relations and International Marketing; and Corporate Affairs & Visitor Engagement Services. By leveraging the collective resources and expertise of these areas, Destination Ontario optimizes the impact of our activities and programs.

Destination Ontario, as the leading force in provincial tourism marketing, will continue to strengthen its collaborations with key tourism stakeholders, building on the momentum of its 2024-27 Strategic Playbook. In response to growing global competition, Destination Ontario will work closely with Regional Tourism Organizations (RTOs), Destination Marketing Organizations (DMOs), sector associations, and the private sector to explore revenue opportunities, drive efficiencies, and ensure program sustainability through innovation.

As an agency of the Government of Ontario, Destination Ontario works closely with the Ministry to align agency goals, objectives, and strategic direction with government priorities and direction, including those outlined in the 2026-27 Letter of Direction.



Office of the President & CEO

The Office of the President & CEO delivers executive support to the President and CEO in guiding operational strategy, overseeing management, and executing the agency's key initiatives. This includes close coordination with the Board and industry committees. As an agency under MTCG, Destination Ontario maintains regular engagement with the Ministry, ensuring seamless collaboration across ministerial portfolios. The President's office is committed to aligning Destination Ontario's strategic objectives with government priorities, fostering partnerships, and enhancing communications to support the growth and resilience of the tourism and culture industries.

Corporate Affairs & Visitor Engagement Services

The Corporate Affairs team oversees administration operations in the areas of strategic and operational planning, controllership, financial management, accounts payable, human resources, procurement, facilities and asset management, and general administration services for Destination Ontario. This program area is also responsible for business continuity planning in the event of an emergency. The team provides strategic direction and leadership in the planning, delivery and evaluation of all corporate service strategies, systems and controls to support the ongoing business operations of Destination Ontario, including financial planning and reporting, and executing agreements efficiently and effectively to support industry partners. Corporate Affairs provides solutions-focused advice on agency matters, ensuring the financial,

reputational and policy interests of the ministry and government are considered and compliant with Ontario Public Service (OPS) policies and directives.

Ontario Travel Information Services

Ontario Travel Information Services (OTIS) create trip plans and drive bookings of Ontario tourism products and experiences and influence consumer travel purchasing decisions by providing travel advice and inspiration to visitors across multiple visitor service channels, resulting in incremental spend. Destination Ontario's expert travel counsellors offer personalized trip planning in person: at festivals, events and busy tourist locations as well as at the Ontario Travel Information Centres (OTICs), and digitally: by email, phone, chat and video conference/chat to help visitors to discover the variety of tourism products and experiences available in Ontario.

Destination Ontario continues to evolve OTIS through strategic modernization initiatives and a 'Visitor Care' approach to enhance the delivery of tourism information services to visitors beyond the traditional bricks-and-mortar model through modern digital and in person channels and support the industry to ensure strategic investments and partnerships.

Brand Experience

The Brand Experience team manages an extensive portfolio that covers all stages of campaign development, from planning and execution to monitoring performance across various marketing channels. This critical role enhances Ontario's presence across digital, social, and traditional media, ensuring a cohesive and impactful message that attracts visitors to the province.

The team's main functions include:

1. **Planning and Executing Omni-Channel Marketing Campaigns:** The Marketing team develops and oversees marketing campaigns across a range of channels to maximize reach and engagement. They are responsible for integrating messaging across digital, print, broadcast, and other media channels to create seamless experiences that connect with diverse audiences. Additionally, they track and report on campaign performance, providing insights that help optimize future initiatives.
2. **Owned Social Media Strategy and Management:** Managing all Destination Ontario-owned social media channels, this function includes developing and executing content strategies that reflect Ontario's tourism brand. The Social team creates, schedules, and manages social content, engaging audiences and fostering community across platforms like Instagram, Facebook, Twitter, and others. They also monitor social media metrics to continually refine their approach and boost engagement.
3. **Creative Fulfillment for Organizational Needs:** The Creative Services team fulfills all creative needs across the organization, from concept development to final production of visual assets. This includes designing campaign visuals, producing video, promotional materials, branding, and ensuring a consistent visual identity across all platforms.

4. **Complete Operational Management of DestinationOntario.com:** The Web & Content team is responsible for the overall management, content creation, and user experience of DestinationOntario.com. This includes updating and maintaining the website to ensure it is a reliable and appealing resource for visitors. They focus on search engine optimization (SEO), content strategy, and ensuring the site offers relevant and timely information that showcases Ontario's tourism offerings effectively.

Northern Marketing and Partnerships

Destination Ontario has a specific team focused on increasing visitation to Northern Ontario. Destination Ontario works with northern tourism partners to market the North's unique product, Indigenous experiences and natural landscapes. While the North as a destination is promoted and integrated across all the agency's work, there is also a specific concentration on avid consumers with a focus on powersports and touring, angling and hunting, and outdoor adventure.

Destination Ontario's northern marketing efforts are supported and undertaken in collaboration with strong northern partners, including RTOs 13 and 12, DMOs, sector associations and individual tourism operators.

A significant segment of Northern Ontario's tourism industry relies heavily on the U.S. traveller. As part of supporting the North, Destination Ontario's northern marketing programs and activities will continue to focus on both avid and leisure American travellers, while continuing efforts in Ontario and other source Canadian markets. Collaboration with northern partners will be critical to leverage marketing plans to target consumers to return to Ontario and to welcome new visitors.

Industry Relations and International Marketing

Partnerships and Communications

The Partnerships and Communications team includes three key areas for the organization: Partnerships, Corporate Communications, and the Broadcast Program.

Partnerships

The Partnerships team strengthens Ontario's tourism ecosystem by building collaborative relationships with RTOs, DMOs, sector associations, Indigenous partners, provincial agencies, and private operators. Destination Ontario provides partners with access to research, insights, and marketing tools that amplify their efforts, expand market reach, and position Ontario as a premier global destination. Active engagement at industry events and conferences, both in-person and virtual, supports knowledge exchange, fosters networking, and reinforces the agency's leadership role.

Together, these efforts showcase Ontario's tourism assets, drive visitation and spending, and deliver lasting economic benefits. Partnerships remain a cornerstone of Destination Ontario's strategy, ensuring the industry is well-positioned for growth, resilience, and global recognition.

Corporate Communications

Destination Ontario will continue to strengthen its corporate communications strategy to deepen engagement with tourism stakeholders and reinforce its reputation as a trusted industry leader. Corporate communications ensure the organization delivers clear, consistent, and timely information to stakeholders, partners, government, media, and the public -- supporting transparency, building trust, and highlighting the value of Destination Ontario's work.

Broadcast Program

The Broadcast Program is unique to Destination Ontario. The only program of its kind across all provincial marketing organizations, it supports Destination Ontario's mandate to market Ontario as a preferred tourism destination by bringing the province's products, experiences, attractions, and local tourism businesses to life on radio and television.

International Marketing

The international traveller is an important contributor to Ontario's tourism economy, as they typically stay longer and spend more than domestic visitors. In 2023, overseas visitors accounted for just 2% of total tourist visits to Ontario yet represented 16% of total visitor spending.

The International Marketing team at Destination Ontario positions Ontario as a preferred global destination, with the goal of attracting more international visitors and increasing visitor spending from key markets. The team focuses on raising awareness of Ontario and providing travellers with compelling reasons to choose the province.

As international leisure travel continues to recover in phases, competition for global travellers remains intense. Destination Ontario employs an integrated marketing approach to ensure Ontario stands out among competing destinations. The International Marketing program is guided by research and insights to support strategic decision-making across three key areas:

- **Business Development** – Collaborating with travel companies (including tour operators, wholesalers, and travel agents) to increase awareness of Ontario and drive sales of market-ready tourism products and experiences.
- **Media and Public Relations** – Working with journalists, editors, and influencers to secure positive third-party editorial coverage that raises awareness and inspires travel to Ontario.
- **Consumer Marketing** – Promoting Ontario directly to consumers through digital and social media campaigns to strengthen awareness, consideration, and travel intent.

Destination Ontario works collaboratively with Destination Canada, Regional Tourism Organizations (RTOs), Destination Marketing Organizations (DMOs), sector

associations, ministry partner agencies, the private sector, and in-market representatives to promote Ontario internationally.

TOURISM OUTLOOK

Tourism is a major economic driver for Ontario. In 2023, there were 129.3 million tourist visits in Ontario, with visitors spending an impressive \$34.8 billion.

This strong momentum continued in 2024. Ontario reached a major post-pandemic milestone: total tourist visits in Ontario surpassed the 2019 level, reaching 132.7 million visits.

The Ontario market has been the engine of Ontario's post-pandemic recovery. With over 3 million more Ontario tourist visits within the province, tourist visits from Ontario were 3% higher in 2024 than in 2019.

There was year-over-year growth from all major markets in 2024 – Ontario, Other Canada, the U.S., and overseas - proving the resilience and appeal of the province. The strongest year-over-year growth in 2024 was delivered by the U.S. and overseas markets, a clear signal of Ontario's growing international appeal.¹

The outlook for tourism in Ontario is highly favourable, and Ontario is positioned to achieve growth in visits and visitor spending despite global economic uncertainty and geopolitical turmoil.

Domestic tourism in Ontario remains strong in 2025. Figures show intraprovincial and interprovincial visits and visitor spending are up, confirming the stability of the market.

Interest in travelling in Ontario is high among Ontario residents. Ontario continues to be highly regarded as a destination for leisure travel, with most travellers in Ontario and other Canadian provinces expressing a positive view. There is a clear preference for planning trips to Ontario well in advance (7 to 12 months out) in Ontario and other Canadian markets, which is important for future stability. Most travellers in Ontario and other Canadian provinces feel travel is a worthwhile investment, even in the current economic climate, but financial pressures remain a concern.

Overall, economic and sentiment factors for domestic travellers position Ontario favourably. Multiple influences, including the unfavourable Canadian/U.S. exchange rate, are disincentivizing outbound domestic travel to the U.S. – a trend that is expected to continue. Domestic tourism in Ontario is poised for continued growth. Projections (2026-2029) forecast average year-over-year growth of 0.7% in intraprovincial overnight visits in the province and 1.2% in interprovincial overnight visits.²

¹ Source: Statistics Canada (National Travel Survey, Visitor Travel Survey).

² Sources: The Conference Board of Canada; Statistics Canada.

The United States remains Ontario's largest international tourism market. Ontario continues to be highly rated as a top leisure travel destination in U.S. Drive and Fly markets, and is perceived as friendly and inclusive, providing good value for money. While travel intent data suggest that some U.S. travellers are starting to feel the strain of rising costs and broader economic uncertainty, Ontario's favourable exchange rate provides an advantage, helping offset rising travel costs and allowing Americans to enjoy more for less.

Despite a slight decline in U.S. visits to Ontario in 2025, the overall outlook for U.S. tourism to Ontario is positive. Overnight visits from the U.S. to Ontario are projected to see sustained growth between 2026 and 2029.³

Overseas, global geopolitical shifts are driving a competitive advantage in Ontario's favour. Ontario's overseas markets are performing well. Research into Ontario's key European markets found Canada is highly appealing, distinct from the U.S., and Ontario holds strong promise for capturing traveller attention in an increasingly competitive global market. The U.K., France, and Germany are leading overseas recovery in Ontario, with the U.K. market nearly recovered to its 2019 level, followed closely by France and Germany. Overnight visits to Canada from the U.K. are forecast to surpass the 2019 level in 2026.⁴

A critical new opportunity is the resumption of group tours for Chinese citizens to Canada, which is expected to provide a boost to high-volume, high-value visitation. Ontario's largest source markets among its priority overseas markets are the U.K., Mexico, and China.

For 2026, trends suggest that travellers are seeking unique restored hotels, and that many want to book multiple hotels within a single destination. Farm stays are increasing in popularity. Travellers are interested in taking a trip centered around reading, relaxation, and quality time with loved ones, and, as in previous years, movies and TV shows are influencing travel decisions, with many travellers seeking out destinations featured in their favourite media. Sports travel is on the rise, and the FIFA 2026 World Cup is expected to be a catalyst for travel. In Ontario's U.S. and European markets, two in five U.S. travellers say they are likely to visit Toronto because it is hosting the FIFA 2026 World Cup,⁵ and about one-third of European travellers are likely to visit Toronto because of it.⁶

Destination Ontario continues to closely monitor the changing travel landscape, including developments in U.S.-Canada relations, to proactively assess any potential impact on tourism. To gain deeper insights into the factors influencing travel to Ontario and inform marketing initiatives, Destination Ontario is conducting regular, ongoing

³ Sources: The Conference Board of Canada; Statistics Canada.

⁴ Source: Destination Canada Tourism Outlook 2025-2030; Tourism Economics.

⁵ Source: CRG, Ontario Travel & Tourism Monthly (September 2025).

⁶ Source: CRG, European Traveller Pulse Study (May 2025).

research to understand travel intentions and perceptions of Ontario among domestic, U.S., and overseas travellers in the current economic and political environment.

IMPLEMENTATION PLANS

In 2026–27, Destination Ontario (DO) will advance its core mandate to promote Ontario as a premier travel destination, driving increased visitation, tourism spending, and industry resilience across the province. Guided by government priorities and the Strategic Playbook principles, DO will execute integrated market plans that deliver measurable results for Ontario's tourism economy.

The year ahead is characterized by purposeful evolution: strengthening our marketing effectiveness through **data-driven insights**, expanding our reach through **modernized digital and experiential channels**, and deepening **collaboration with partners** to ensure shared value and alignment. Our implementation plans translate this strategy into action across the domestic, northern, U.S., and international markets, as well as Ontario Travel Information Services (OTIS), each tailored to specific audiences, conditions, and opportunities while advancing a unified brand story for Ontario.

Across all plans, DO's focus is to:

- Deliver marketing and visitor services that drive economic and regional development.
- Serve as a centre of excellence for provincial destination marketing.
- Lead the promotion of Ontario nationally and internationally through compelling campaigns and partnerships.
- Collaborate with regional, sectoral, and community organizations to market travel within Ontario and beyond.

Each implementation plan details the market dynamics, insights, and tactics that shape our approach for the year. Collectively, they reflect a cohesive framework designed to **maximize value for money, leverage innovation, and maintain marketing agility** in an evolving global tourism landscape.

Performance will be tracked through robust KPIs and impact metrics, including incremental visitation, tourism expenditures, partner leads, and earned media value. In aggregate, DO aims to generate:

- **1,816,350 incremental visits** and **\$414M in incremental expenditures**;
- **15.5M industry leads** across all marketing channels; and
- **\$47.2M in Advertising Value Equivalency (AVE)** from earned media and public relations and broadcasts.

Together, these implementation plans represent a coordinated roadmap for delivering on Destination Ontario's strategic priorities—showcasing Ontario to the world, inspiring travel across all seasons and regions, and ensuring tourism continues to be a powerful driver of economic growth and community vitality.

DOMESTIC MARKETING

The domestic market remains the foundation of Ontario's tourism economy, driving consistent visitation, regional dispersal, and year-round travel. In 2026–27, Destination Ontario will deepen engagement with Ontario and near-province travelers through data-driven, multi-season campaigns that inspire exploration close to home. Efforts will focus on reinforcing travel confidence, strengthening partner collaboration, and building a sustainable culture of repeat visitation that supports local economies across all regions.

Ontario Marketing

With continued strong interest from Ontario-based partners, Destination Ontario will pull back on 'awareness media' but maintain and optimize the partnership system to support seasonal dispersal. This system is focused on driving shoulder season (fall & winter) travel to high-value destinations across the province while integrating Ontario's role into a larger national narrative. Destination Ontario will continue to support the Ontario market through its earned media relations program, targeting broadcast media outlets (radio and television), as well as short- and long-lead print and digital publications. Activities will remain flexible and continue to highlight all areas of Ontario while aligning with Destination Ontario's marketing campaign messaging and partner programs.

Outcomes

- Generate **700K** in incremental visitation and **\$100M** in incremental spend
- Generate **5M** leads to industry from all Ontario marketing activities
- Contribute to the overall \$47.2M AVE goal of earned media across all of Destination Ontario's priority markets, domestic and international

Canada Marketing

Destination Ontario will significantly scale up its domestic market strategy, expanding beyond Ontario and Quebec to include Manitoba, the West Coast, and the Maritimes. Driven by partner interest and geopolitical opportunity, this shift positions Ontario as a national leader in domestic tourism. Efforts will be anchored by a strengthened partner marketing system and strategic partnerships with major transportation, attraction, and sectoral partners.

Destination Ontario will broaden its collaborative partner model to work with Quebec, Manitoba, the West Coast, and the Maritimes, in addition to national-level partnerships. Strategic partnerships with major transportation, attraction, and sectoral partners will further extend reach and solidify Ontario's position as a must-visit destination on the national stage.

- Destination Ontario will continue to support the Canadian markets through its earned media program, targeting broadcast media outlets (radio and television),

as well as short- and long-lead print and digital publications. Activities will remain flexible and continue to highlight all areas of Ontario while aligning with Destination Ontario's marketing campaign messaging and partner programs

Outcomes

- Generate **600K** in incremental visitation and **\$90M** in incremental spend
- Generate **5M** leads to industry from all Ontario marketing activities
- Contribute to the overall \$47.2M AVE goal of earned media across all of Destination Ontario's priority markets, domestic and international

U.S. Marketing

The U.S. remains Ontario's most important international market and a key driver of future growth. In 2026–27, Destination Ontario will strengthen its position by focusing on four strategic shifts.

First, we will build on our successful partnership approach, expanding a collaborative campaign model that aligns destination partners around shared objectives, unified messaging, and coordinated investment. This model has proven effective in creating a stronger, more coherent presence in the market, and will continue to be the foundation of how we market Ontario in the U.S.

Second, we will concentrate efforts on the near-border drive market, where accessibility, value, and conversion potential are highest. This includes a deliberate pullback from short-haul fly markets, ensuring resources are directed where they can deliver the greatest impact.

Third, we will refresh our creative platform to directly address the most pressing barrier identified in consumer insight work: the perception among some U.S. travellers that they may not feel welcome in Canada. The new platform will focus on warmth, hospitality, and the diverse people and experiences that define Ontario—positioning the province as an open, inviting place to explore.

Finally, we will remain adaptive to a shifting geopolitical and economic environment. Market conditions, currency fluctuations, and cross-border dynamics continue to evolve, and our approach will stay responsive to ensure Ontario remains competitive and relevant.

Outcomes

- Generate **450K** in incremental visitation and **\$200M** in incremental spend
- Generate **2M** leads to industry from U.S. marketing activities
- Contribute to the overall \$47.2M AVE goal of earned media across all of Destination Ontario's priority markets, domestic and international

Northern Marketing

Ontario's North continues to represent both a growth opportunity and a vital component of the province's tourism identity. The 2026–27 Northern Market Plan focuses on showcasing the region's authentic, nature-rich experiences while addressing access and awareness challenges. Through collaborative storytelling with regional partners and Indigenous tourism operators, Destination Ontario will position Northern Ontario as a must-visit destination for adventure, culture, and connection to nature, supporting economic diversification and community resilience.

Destination Ontario has a dedicated team and budget focused on promoting Northern Ontario. The team works in close collaboration with Destination Marketing Organizations and other key tourism partners across the region. Its mission is to drive increased visitation and visitor spending in Northern Ontario through effective, collaborative marketing programs and partnerships.

The marketing approach is anchored in key avid travel experiences connected to the region's major travel corridors and gateways to the North. Recognizing that not all travelers to the region are focused on activity-based travel, planning will also accommodate more diverse visitor segments.

Products Areas of Focus

- **Angling & Hunting:** focuses on gear and fly anglers, target markets include the U.S., Manitoba and Ontario
- **Powersports & Touring:** focuses on motorcycle, snowmobile, ATV, RV and boating activities; target market focus in the US, Ontario and Quebec markets
- **Outdoor Adventure:** focuses on outfitted, adventure outdoor experiences including cycling, paddling and avid activities like backcountry camping and rock climbing; target market focus in U.S. and Ontario

In addition to these key avid product areas, Destination Ontario's Northern marketing team undertakes strategic conversations with partners in the region to ensure additional tourism product and experiences are represented (Pan-Northern).

Outcomes

- Build upon 2025-26 baseline travel intention rate to Northern Ontario across key avid product
- Generate **3.5M** leads to industry from northern marketing activities

International Marketing

The International Marketing Program's overall objective is to drive Ontario's destination awareness and grow visitation and revenue. All integrated areas are focused on the following areas:

Awareness Growth

- Increase awareness and consideration of Ontario as a destination, while highlighting what makes Ontario stand out from other global competitors.

Visitation Growth

- A focus on driving growth during the peak seasons of summer and fall, while also building more momentum in the off-peak months of spring and winter.

Revenue Growth

- Attracting more highly engaged international visitors—guests who spend more, return often, show resilience to market shifts, and share values of responsible travel. A secondary focus is on VFR (visiting friends and relatives) travellers.
- Working to extend visitor stays by encouraging travellers to explore more destinations within Ontario and build longer itineraries.

Destination Ontario's priority international markets include the UK, Germany, France, China, Japan, South Korea, Mexico and Australia.

The International Marketing program has three core pillars for executing its work: Business Development, Media Relations and Public Relations, and Consumer Marketing.

Business Development

Objective: To promote Ontario to travel companies and leverage this powerful distribution network to increase awareness and convert interest into bookings for Ontario.

Outputs:

Promote market-ready destinations and experiences

- Educate and train travel agents and tour operators
- Execute trade partnerships with tour operators
- Participate in and support key marketplaces, such as Rendez-vous Canada (RVC). *2026 will have a spotlight on Ontario with RVC being held in Toronto in May.*
- Host trade familiarization (fam) tours
- Lead in-market business-to-business sales programs
- Leverage trade partnership opportunities with Destination Canada
- Build and maintain relationships with key accounts
- Train at least 3,000 travel agents on Ontario's travel products

Outcomes:

- Deliver 25,350 incremental visits and \$23.8M incremental expenditures through International Trade Partnership Programs
- Improved travel trade sales effectiveness for Ontario

Media Relations and Public Relations

Objective: To achieve positive, third-party media coverage for Ontario to drive awareness and inspire visitation.

Outputs:

- Pitch stories to generate awareness
- Build, nurture and maintain relationships with key accounts
- Provide resources such as information and visual assets
- Collaborate with key partners
- Attend key media marketplaces and in-market media events
- Execute media and public relations activities to generate interest
- Host press tours that highlight Ontario's iconic and best-in-class experiences, including key festivals and events
- Leverage media partnership opportunities with Destination Canada

Outcomes:

- Generate **\$47.2M** AVE in earned media across all of Destination Ontario's priority markets, domestic and international

Consumer Marketing

In 2026–27, Destination Ontario will launch a multi-year international campaign to build global awareness and consideration of Ontario as a top travel destination. The campaign showcases Ontario's welcoming, multicultural appeal with a playful, warm tone rooted in Canadian humour.

Creative Platform: “We’d Never Brag, But You Can.”

International travellers enthusiastically “translate” Canadians’ modest descriptions of Ontario, creating an engaging and aspirational storytelling style.

The campaign targets highly engaged guests across priority markets, using a unified creative approach - adapted to local market nuances - to highlight Ontario's attractions, culture, diversity, and experiences. Extensive testing confirmed strong resonance, supporting its use across consumer, media, and travel trade channels to drive interest and visitation.

Outputs:

- Differentiate Ontario through Destination Ontario-led consumer campaigns in key markets
- Maintain and refine curated market-specific landing experiences on DestinationOntario.com
- Leverage Destination Canada's opportunities, investment and reach, as well as the Canada brand
- Collaborate on airline, corporate, content partnerships
- Awareness strategy targets will be set for each market to measure performance against key metrics, including visits and visitor spending.
- Establish benchmark for brand awareness in select markets

Outcomes:

- Pre-post campaign message lift
- Web sessions/page views
- Contribute to the overall organizational goals of incremental visits and incremental expenditures from advertising and leads to partners

- Audience Growth 5% and Content Advocacy of 10%
- Improved ability to measure brand performance

CONSUMER ENGAGEMENT

Consumer Website

Starting in spring 2025, Destination Ontario is conducting an extensive user experience overhaul on its consumer website, destinationontario.com. This includes visual identity improvements, interface validation and accessibility review with a goal of offering a visitor-first and user-focused experience for consumers and tourism stakeholders.

The technology team will continue to implement improvements to align with the data gathered from performance audits. Destination Ontario will continuously optimize the content to best position the site to positively affect traveler's purchasing decisions to build Destination Ontario's authority, knowledge, position, and positive relationship with its audience. Content will build on product and seasonally relevant content, as well as 'Know Before You Go' content. All articles will undergo ongoing generative AI and SEO updates for relevance and accuracy.

Social Media

Objective: To inspire travel to Ontario by growing diverse, engaged communities and encouraging advocacy through accessible, compelling content across key markets.

- **Creating Digestible Social Content**
Using destinationontario.com itineraries and the CrowdRiff Creators Program, our social team showcases Ontario's regions and experiences. Combined with user-generated content, this approach delivers mobile-friendly, bite-sized storytelling that highlights experiences at scale.
- **Connecting with American, Canadian & International Travellers**
We partner with YouTube creators with strong U.S., Canadian, and international followings to inspire travellers through long-form storytelling and detailed itineraries. This approach builds awareness, guides planning, and strengthens trust by delivering relevant content on platforms audiences already use.
- **Building Destination Ontario's YouTube Presence**
Destination Ontario is expanding its YouTube presence with a calendar of shorts to boost reach and engagement. Paid promotion and curated playlists featuring trusted creators amplify visibility and showcase diverse stories from across the province.

Ontario Travel Information Services (OTIS)

The OTIS team will continue to deliver first class visitor information services across several channels to influence travel purchasing decisions and increase the perceived value of Ontario tourism products and experiences by developing bespoke,

personalized trip plans. This activity drives bookings of tourism activities, experiences and accommodations, and results in increased incremental spend that contributes to tourism receipts for the province.

OTIS will deliver trip planning and visitor information services across multiple touchpoints and channels to connect with consumers “where they are” both in-person and in digital spaces:

- In person roaming at key festivals, events and high traffic tourism locations
- In person at travel information centres
- By phone (1-800-ONTARIO toll free phone line)
- By email
- Virtually by video conference (advance booking)
- By web-based chat
- By live video chat (instant)
- Other digital channels and spaces such as SMS, WhatsApp and travel forums

OTIS’ activity in 2026-27 will be driven by the OTIS Modernization Plan in alignment with the four pillars of Destination Ontario’s Strategic Playbook. OTIS’ strategy to achieve a broader reach and to maximize the impact of this activity will be centred around a multi-channel approach to the delivery of visitor information services and will continue to be informed by the Office of the Auditor General of Ontario (OAGO) Value for Money report, the Minister’s Letter of Direction, as well as research (jurisdictional, service audits, consumer surveys, partner surveys)

The closure of 6 OTICs in 2025 will allow OTIS to continue to leverage staffing and operating resources to expand and grow existing digital and in person channels to achieve a higher return on investment.

As OTIS continues to modernize, there will be four main areas of focus:

- o **Modernization:** focuses on shifting visitor services from traditional bricks and mortar visitor centres and grow and expand innovative digital and in-person channels
- o **Digitization:** focuses on growing and expanding digital service delivery channels to expand reach and on distributing digital information, partner materials and developing digital trip planning resources
- o **Engagement:** focuses on innovative ways to connect with and engage consumers both digitally (i.e. social channels) and in-person while roaming (i.e. immersive 2D virtual reality)

Core tactics that will drive OTIS activity for 2026-27 include:

Roaming Activity

- Increase roaming partnerships with key DMOs, MTCG agencies, attractions and festival and event organizers for more pan-provincial presence and shift from bricks and mortar locations

Digital Service Delivery Channels

- Grow and expand existing digital channels based on consumer feedback, preferences and trends

- Pilot and implement new digital channels in partnership with Destination Ontario data and insights team and in alignment with new digital platform

Social Presence

- Work with Destination Ontario social and marketing teams to grow OTIS presence on social channels and support trending approach of one-to-one visitor engagement to one-to-many

Outputs:

- Deliver first class trip planning and visitor information services
- Engage with consumers across multiple channels, both in-person and digital
- Convert consumer engagements into bespoke, personalized trip plans
- Pan-provincial presence delivered at priority festivals and events across Ontario
- Pan-provincial partner agreements with tourism organizations and businesses
- Initiatives delivered to drive bookings of activities and accommodations throughout Ontario

Outcomes:

- Maintain Visitor Health Score (VHS) of 90 or more
- Generate 41,000+ Trip Plans
- Generate 30+ roaming partnerships
- Achieve partnership satisfaction score of 85 or greater (score contributes to Destination Ontario's overall partner satisfaction score)
- Improved high-quality visitor experiences and improved satisfaction through a modernized and fully integrated omni-channel service model
- Incremental tourism spending generated from increased bookings of activities and accommodations
- Increased visibility and awareness of Ontario's tourism offerings among visitors through consistent province-wide presence
- Generate additional overnight stays
- Generate additional spend on tourism activities
- Repeat visitor engagement
- Increase staff knowledge of Ontario tourism products and experiences
- Strengthen province-wide collaboration and market reach through formalized partnerships with tourism organizations and businesses across Ontario

INDUSTRY ENGAGEMENT

Partnerships

The Partnerships team strengthens Ontario's tourism ecosystem by building collaborative relationships with Regional Tourism Organizations (RTOs), Destination Marketing Organizations (DMOs), sector associations, Indigenous partners, corporate partners, provincial agencies, and private operators. Destination Ontario provides partners with access to research, insights, and marketing tools that amplify their efforts, expand market reach, and position Ontario as a premier global destination. Active engagement at industry events and conferences – both in person and virtual – supports knowledge exchange, fosters collaboration, and reinforces the organization's leadership role.

In 2026–27, the Partnerships team will continue to serve as a connector and convener across Ontario's tourism network – facilitating collaboration, aligning resources, and ensuring shared initiatives deliver collective value. Destination Ontario will modernize its partnership approach, aligning outcomes with the Strategic Playbook (2024–27) and ministry direction while introducing clear performance measures that reflect corporate priorities and shared accountability.

In the next fiscal year, Destination Ontario will advance inclusive and sustainable tourism by deepening engagement with equity-deserving groups and strengthening collaboration with public partners. Key priorities include developing a 2SLGBTQIA+ Tourism Partnerships Strategy, continuing accessible tourism initiatives in partnership with AccessNow, and supporting the Black Tourism Working Group in elevating Black tourism entrepreneurs and leaders. Renewed collaboration with Indigenous Tourism Ontario (ITO) and Six Nations Tourism will further support Indigenous operators through coordinated marketing efforts and mentorship opportunities.

Partnerships in research will continue to grow, including the GTA South Asian Travel Market Study with Destination Toronto, Visit Mississauga, Vaughan Tourism, Brampton Tourism, and Destination Markham, and new studies focused on 2SLGBTQIA+ travellers and their experiences in Ontario. These insights will inform marketing, communications, and partnership priorities.

Sustainability remains a key focus. Following Gold GreenStep Sustainable Tourism certification (October 2025), Destination Ontario will implement its Sustainability Leadership Circle 2026 Action Plan, working with Agritourism Ontario, Farmers' Markets Ontario, and Ontario Creates/Ontario Green Screen. Partnerships with Bike Share Toronto, FlixBus, Metrolinx, Ontario by Bike, Ontario Northland, and VIA Rail will promote sustainable and low-impact travel. Destination Ontario will continue to highlight its sustainability journey and share best practices that encourage industry partners to pursue similar commitments to responsible and sustainable tourism.

Corporate partnerships will expand Ontario's tourism reach through collaborations with Ontario Lottery and Gaming, Ontario Power Generation, Air Canada, WestJet, Air Transat, Greater Toronto Airports Authority, the Toronto Blue Jays, and the Canadian Songwriters Hall of Fame. Sport tourism will also remain a growth priority, aligning with professional leagues, major events, and community organizations to strengthen Ontario's position as a premier sport and event destination.

Partnership coordination will remain strong through bi-monthly meetings with Destination Toronto, Ottawa Tourism, and Niagara Falls Tourism / RTO 2, and quarterly sessions with Ontario Parks and the Niagara Parks Commission.

Collaboration with Destination Canada, Destination Toronto, and the City of Toronto has advanced exploratory work to expand the MICHELIN Guide Toronto and Region across the province (TBC), with the goal of elevating Ontario's culinary reputation in international markets.

Together, these efforts strengthen Ontario's tourism ecosystem, drive visitation and spending, and deliver lasting economic benefits. Partnerships remain central to Destination Ontario's strategy for 2026–27— positioning the industry for growth, resilience, and global recognition.

Corporate Communications

Destination Ontario will continue to strengthen its corporate communications strategy to deepen engagement with tourism stakeholders and reinforce its reputation as a trusted industry leader. The agency's communications activities are grounded in transparency, collaboration, and continuous improvement, ensuring partners across Ontario's tourism ecosystem remain informed, aligned, and inspired by Destination Ontario's leadership and results.

In 2026–2027, corporate communications will build on the momentum of its growing communications platforms, which have significantly expanded the agency's reach and impact. The *Destination Digest* newsletter has grown to more than 1,500 subscribers, with rising engagement rates that reflect strong industry interest in timely, relevant updates and insights. The agency's LinkedIn presence continues to expand as an important channel for sharing partner stories, thought leadership, and sector achievements, while the corporate website (destinationontario.com/corporate) provides stakeholders with access to strategic resources, corporate updates and partnership opportunities.

Destination Ontario will also continue proactive media outreach to earn media coverage that informs Ontario consumers about the agency's initiatives, partnerships, and leadership in tourism marketing. Corporate communications will continue to highlight Destination Ontario's leadership, partnerships, and contributions to Ontario's tourism economy through consistent, proactive storytelling.

In 2026–2027, this includes supporting communications around Ontario's role in hosting FIFA World Cup 26™, ensuring partners are informed and ready to leverage this once-in-a-generation opportunity. Destination Ontario will also continue to contribute to national collaboration by supporting the communications working group for Rendez-Vous Canada, providing alignment and communications support where needed to strengthen Canada's collective tourism voice.

Aligned with Destination Ontario's *2024–2027 Strategic Playbook*, corporate communications contributes to all four strategic pillars. It supports Making Strategic Investments by maximizing the efficiency and reach of communications tools and channels; Aligning Outcomes Through Strategic Partnerships by amplifying partner achievements and encouraging collaboration; Advancing Corporate Leadership by positioning Destination Ontario and its leaders as trusted sources of insight, innovation, and industry best practices; and Levelling Up through continuous performance measurement and demonstration of value for money and return on investment.

Planned outputs for 2026–2027 include the ongoing publication of *Destination Digest*, expanded engagement across digital channels, increased visibility for Destination

Ontario's programs and partnerships, earned media coverage of key initiatives, and enhanced collaboration through industry communications networks.

Expected outcomes include improved stakeholder awareness of Destination Ontario's leadership and priorities, stronger alignment with tourism partners across the province, broader consumer awareness of Ontario's tourism offerings and leadership, and greater confidence in the agency's ability to deliver measurable results that drive collective growth for Ontario's tourism industry.

Through these efforts, Destination Ontario's corporate communications program will continue to inform, connect, and inspire – ensuring Ontario's tourism story is shared with clarity, credibility, and pride.

Market Research and Data Intelligence

Destination Ontario's research and data analysis function is essential for generating critical market intelligence and understanding evolving consumer behaviour. This evidence-based approach empowers the agency and its tourism partners to make informed strategic decisions, adapt effectively to changing market dynamics, and ultimately achieve positive outcomes for Ontario's tourism sector. To enhance efficiency and ensure a unified approach to data and insights, Destination Ontario now operates with a centralized research and data analysis function.

Destination Ontario's research activities cover a broad spectrum, including: market analysis and profiling; understanding consumer preferences and travel intentions; pre-campaign performance testing and campaign performance measurement; strategic and corporate performance monitoring and strategy development; tracking timely target market sentiment through large-scale studies; marketing ROI forecasting; surveying for partner feedback and program evaluation; and, providing current tourism industry intelligence.

Destination Ontario is committed to providing industry partners with the insights they need to understand today's travellers and make informed decisions. In partnership with Context Research Group, Destination Ontario's new insights portal marks an important step toward delivering more timely, relevant, and actionable tourism intelligence. The Destination Ontario Insights Portal (DO-IP) is live – and free – giving partners one convenient place to access tourism data and research to make informed, evidence-based decisions. With interactive tools and easy-to-use reports, the portal helps uncover insights, identify opportunities, and build stronger, data-driven strategies. The DO-IP includes access to the new Ontario Travel & Tourism Monthly (OTTM) which provides timely insights into traveller sentiment, behaviour, and emerging trends from key domestic and international markets. OTTM delivers data unique to Ontario, helping partners anticipate shifts and make informed marketing decisions.

Visitor Information Services Network

Destination Ontario will continue to be a leader in the visitor information services space both on the provincial and national levels. In alignment with the Strategic Playbook, the Visitor Information Services (VIS) network supports the pillar of Advancing Corporate Leadership. Destination Ontario leads the VIS network with members representing more than 200 local and regional visitor information centres and service providers across the province. The VIS network connects RTOs, DMOs and local economic development offices to build a stronger network and foster the sharing of best practices and resources, providing a platform for members to collaborate, grow and learn from each other.

Destination Ontario will expand the network to include VIS colleagues from various provinces and territories across Canada and establish an online community forum for national VIS network.

Outputs:

- Quarterly email updates to share best practices, links to research and training
- Quarterly webinars featuring fireside chats with members, research study results, presentations from other jurisdictions and groups
- Weekly posts on the online community forum including articles, case studies, polls, and member spotlights
- Annual network survey to inform VIS strategy

Outcomes:

- Stronger network resulting in improved customer experience across province
- Leveraging of resources, learnings and best practices across network
- Building stronger regional ties between VIS members in Ontario
Developing stronger ties with provincial VIS colleagues

PERFORMANCE MEASURES

Business Plan performance measures are complemented by comprehensive metrics for each activity area that are monitored and reported on a quarterly basis through an output and outcome-based lens.

PERFORMANCE MEASURES / BUSINESS PLAN

		2024-25 Actual	2025-26 GOAL	2026-27 GOAL	2027-28 GOAL	2028-29 GOAL
1	Incremental Visits and Expenditures as a result of Advertisement)					
	Incremental Visits	1,011,060	1,500,000	1,816,350	1,700,000	1,700,000
	Incremental Spend	\$328,069,319	\$557,500,000	\$414,200,000	\$608,500,000	\$608,500,000
2	Total Leads to Partners	18,422,514	14,000,000	15,500,000	12,000,000	12,000,000
3	Advertising Value Equivalency ¹	\$93,701,866	\$40,000,000	\$47,200,000	\$55,696,000	\$123,635,285
4	Incremental Visits & Expenditures as a Result of Trade Partnerships					
	Incremental Visits ²	16,282	19,500	25,350	32,955	22,169
	Incremental Expenditures ²	\$36,171,701	\$18,900,000	\$23,814,000	\$30,005,640	\$34,586,502
5	Website Excellence					
	Site Health Score *SEMRush	92%	77%>	77%>	77%>	77%>
	Authority Score *SEMRush	53%	50%>	50%>	50%>	50%>
6	Social Engagement					
	Social Audience Growth	5%	5%	5%	5%	5%
	Content Advocacy	6%	8%	10%	13%	13%
7	Travel Services Visitor Health Score	92%	90%>	90%>	90%>	90%>
8	Travel Services Trip Created	32,638	41,250	41,250	45,478	45,478
	TO UNDERTAKE JOINT MARKETING INITIATIVES WITH THE TOURISM INDUSTRY (Aligning Strategic Objectives) - by Campaign/Program End Quarter					
9	Total Number of Invested Partners - Buy In	76	70	70	70	70
10	Total partner investment into DO-led Industry programs - Buy In	\$2,183,500	\$2,000,000	\$2,000,000	\$2,000,000	\$2,000,000
11	Partnership Satisfaction Score - Buy In Programs	96	80	85	85	85
	TO SUPPORT AND ASSIST THE MARKETING EFFORTS OF THE TOURISM INDUSTRY (Advancing corporate leadership)					
12	Corporate Leadership Score	N/A		84%	84%	84%
13	Education Series Usefulness Score					
	OTIS - Visitor Information Services Network webinars	89	75	77	80	80

PERFORMANCE MEASURES / BUSINESS PLAN

		2024-25 Actual	2025-26 GOAL	2026-27 GOAL	2027-28 GOAL	2028-29 GOAL
14	Education Series Attendance Score					
	OTIS - Visitor Information Services Network webinars	96	75	77	80	80
	WORK IN COOPERATION WITH THE TOURISM INDUSTRY, GOVERNMENT OF ONTARIO, OTHER GOVERNMENTS AND AGENCIES TO PROMOTE ONTARIO (Aligning Strategic Objectives)					
15	Ontario Stakeholders Participating in DO-Led Programs - In Kind	905	1200	1200	1200	1200
16	Number of Programs - In Kind	134	150	150	150	150
17	Partner Satisfaction Score - In Kind	96	97	97	97	97

Notes:

1. Targets for 2026-27 and 2027-28 were determined by applying the average historical YoY growth rate in AVE from 2021-22 to 2023-24, adjusted by the projected YoY growth rate for 2024-25 over 2023-24 (i.e., 18%). The target for 2028-29 was determined by applying the average historical YoY growth rate in AVE from 2021-22 to 2024-25 (32%) to the 2025-26 actual AVE result.
2. Targets for 2025-26, 2026-27 and 2027-28 were determined by applying the average historical YoY growth rate from 2017-18 to 2018-19 (pre-COVID) and 2022-23 to 2023-24 to the published targets for 2024-25 (i.e., 30% for incremental visits and 26% for incremental expenditures). These growth rates were affected by the pandemic. To establish more accurate long-term targets using new actual data, which showed declines in 24-25, the target for incremental visits in 2028-29 was determined by applying the average YoY growth rate from 2023-24 to 2024-25 to the actual 24-25 figure and then compounding this rate annually through 2028-29 (8%). The target for incremental expenditures in 2028-29 was determined by applying the average historical YoY growth rate from 2018-19 to 2024-25 (15%) to the 2027-28 target.

Definitions:

Key Performance Indicator (KPI)

Incremental Visits (Advertising)

Definition

The additional number of visits to Ontario that can be attributed to advertising campaigns by Destination Ontario, as estimated using established survey methodologies.

Incremental Expenditures

The additional tourist spending in Ontario generated by advertising campaigns, as estimated by established survey methodologies.

Key Performance Indicator (KPI) – Ontario and U.S.	Definition
Incremental Visitor Spending – North America and Overseas (via trade channel)	An estimate of the visitor spending generated by the incremental visits resulting from International Trade Partnership Programs (ITPPs).
Earned Media Relations (i.e., Advertising Value Equivalency or AVE)	A monetary measure that quantifies the value of earned media coverage based on what it would cost to achieve the same reach through paid advertisements.
Social Audience Growth	The percentage growth in Destination Ontario's followers or subscribers across social media platforms.
Social Content Advocacy	Engagement in the form of sharing, saving, likes, applauses or amplifications of Destination Ontario social channels content by individuals on their owned social channels. Calculated as total shares, saves, likes, applauses and amplifications divided by total audience size.
Trips Planned (OTIS)	The number of trips to/in Ontario planned through the Ontario Travel Information Services (OTIS) system reflecting intent driven by marketing efforts.
Visitor Health Score (OTIS)	The quality of service that visitors receive when engaging in one of Destination Ontario's Ontario Travel Information Services (OTIS) channels for trip planning. VHS incorporates Net Promoter Score, service level and customer satisfaction ratings.
Total numbers of invested partnerships - Buy-in	The total count of partnerships where stakeholders invest directly in marketing programs led by Destination Ontario under a buy-in model.
Total partner investment into DO-Led Paid Programs - Buy-in	The cumulative financial contributions from partners towards Destination Ontario's paid marketing programs under the buy-in model.
Corporate Leadership Score	In alignment with the commitment in DO's Strategic Playbook 2024-2027 to advance corporate leadership within the Ontario tourism industry, the corporate leadership score is proposed to measure DO's perceived leadership impact within the Ontario tourism industry annually, as assessed by key industry partners.

Key Performance Indicator (KPI)	Definition
Education Usefulness Score	The degree to which stakeholders find Destination Ontario's educational resources and sessions useful for achieving their goals. Based on feedback surveys.
Education Series Attendance Score	This score measures the likelihood of future participation in Destination Ontario education events among session attendees. (Not a measure of attendance at a particular session.)
Total Leads to Industry Partners	Number of inbound consumers driven to destination partners, sector associations or individual business digital properties.
Ontario Stakeholders Participating in Destination Ontario-Led Programs (#)	The total number of stakeholders involved in Destination Ontario's programs, including familiarization tours, campaigns, and promotional initiatives.

WORKFORCE PLANNING & BUDGET

Human Resources Strategy

Destination Ontario's Corporate Services will continue to enhance people and culture practices and performance through the implementation of identified efficiencies, training, strategic advisement, and other supports. This includes:

- Continuing to support Destination Ontario program areas as they evolve in response to agency letters of direction and Destination Ontario strategic planning and modernization initiatives. This will be done with the support of the ministry's human resources (HR) Strategic Business Unit and other human resources and labour relations partners, as required.
- Ensuring OPS policies, directives and programs on HR matters continue to be followed in a consistent and responsible manner. This includes matters around recruitment and inclusive hiring practices, full-time equivalent (FTE) management, talent/performance management, labour relations, and employee engagement.
- Destination Ontario is dedicated to fostering a workplace culture rooted in equity, diversity, inclusion and respect. To support this commitment, Destination Ontario has developed a Diversity, Equity and Inclusion (DEI) framework for our people leaders intended to build capacity, promote collaboration and ensure a respectful workplace where each employee feels valued and experiences a strong sense of belonging.

- Continuing to support the current OPS return to office guidance by providing direction and policy to the Destination Ontario team about the return to the five days in-office standard.

Performance plans for the 2026-27 performance year will be based on the following priorities:

- A collaborative approach within the organization and across the industry to support Destination Ontario's strategic priorities:
 - Making Strategic Investments - Evidence-based marketing decisions that drive return on investment and contribute to the vitality of the Ontario tourism economy;
 - Advancing Corporate Leadership - Build our presence in the Ontario tourism industry through active engagement and communications that offer learnings, best practices, and expertise to support our collective modernization and growth.
 - Aligning Outcomes through Strategic Partnerships - Drive value and alignment through partnership programs with industry, private sector, and government partners to achieve common business outcomes; and
 - Levelling Up - Continuously improve our own organizational capacity to be an effective marketer, trusted partner, and public resource.
- Establish clear data governance for the agency and build data analytics capacity to measure impact of our services. Destination Ontario will have modern marketing campaigns informed by data and consumer insights. Emerging technology and marketing trends will inform the mediums that Destination Ontario markets in and activities the agency undertakes.
- Continue to lead and collaborate with industry partners toward mutual success, strong return on investment and provide value to industry stakeholders. Build alignment and collaborate across the Ministry portfolio including other provincial agencies.
- Continue to develop a holistic research approach and improve how data is mined to incorporate insights into strategic planning and in all marketing activities across the organization. Establish clear data governance for the agency and build data analytics capacity to measure impact of our services. Destination Ontario will strengthen advertising impact tracking and investigate and adopt new, innovative measurement tools.
- Identify transformational opportunities that enhance program delivery, policies and/or legislation within the ministry and enterprise-wide outside the ministry.
- Demonstrate sound management practices, including effective fiscal risk and expenditure management through available controls and measures while ensuring efficiency and long-term sustainability.

- Provide solutions-focused advice on matters related to agency strategic priorities, initiatives and issues – ensuring the financial, reputational and policy interests of the ministry and government are considered.
- Foster a community that embraces accountability by supporting and challenging each other to achieve common goals, drive a collaborative decision-making process and effectively utilize resources to manage strategic priorities. Create transparent reporting systems and regular review cycles to monitor progress and make informed decisions, ensuring resources are used efficiently

Staffing

Destination Ontario is comprised of 82 full-time equivalent (FTE) positions, including roles represented by the Association of Management, Administrative and Professional Crown Employees of Ontario (AMAPCEO), the Ontario Public Services Employee Union (OPSEU), and management positions.

Breakdown of FTEs, as at Jan 2026:

	Full Time	Part Time
Executives	4	
Management/Excluded	14	
OPSEU	49.03	3
AMAPCEO	12	
Total	79.03	3

Compensation is negotiated centrally by the provincial government through collective bargaining and management compensation policies.

*Note: Number of FTEs does not include seasonal staff and students employed by OTIS.

Financial Budget

DESTINATION ONTARIO

2026-27 THREE YEAR PROPOSED
BUDGET

(\$ 000's)

PROGRAM	CURRENT BUDGET 2025-26	PROJECTE D ACTUALS 2025-26	PROPOSED BUDGET 2026-27	PROPOSED BUDGET 2027-28	PROPOSED BUDGET 2028-29
Revenue:					
Province of Ontario Grant	33,063	40,937 ¹	33,851	33,846	33,846
Advertising Sales	2,257	2,217	2,500	2,500	2,500
Travel Information Centres - Sales and rentals	100	240	50 ²	50	50

DESTINATION ONTARIO

2026-27 THREE YEAR PROPOSED BUDGET

(\$ 000's)

PROGRAM	CURRENT BUDGET 2025-26	PROJECTE D ACTUALS 2025-26	PROPOSED BUDGET 2026-27	PROPOSED BUDGET 2027-28	PROPOSED BUDGET 2028-29
Interest Income	200	330	160	150	150
	35,620	43,724	36,561	36,546	36,546
Expenses:					
Advertising and Marketing	19,802 ³	28,856 ³	20,261 ³	19,915 ³	19,638
Salaries and Benefits	10,658	10,797	10,805	11,021	11,242
Travel Information Services	2,305	2,291	2,205	2,238	2,272
Technology Operations	1,042	630	672	685	699
Marketing Intelligence & Business Strategy	597	588	547	600	600
Partnerships	791	883	641	641	641
Amortization of Capital Assets	152	38	35	50	63
Facilities	875	740	890 ⁴	890 ⁴	900
Supplies & Equipment	513	510	485	500	500
Board and Committee Expenses	20	20	20	20	20
Audit	35	35	35	35	35
	36,790	45,388	36,596	36,596	36,609
Net Revenue	(1,170)	(1,664)	(35)	(50)	(63)
Carryover Funds	528	1,626	-	-	-
Addback Non-Cash Items:					
Amortization of Capital Assets	152	38	35	50	63
	(490)	-	-	-	-
Projected FTE Count	86.03	86.03 ⁶	84.03 ⁶	82.03	82.03

¹ DO will also receive \$7M in funding for the planning, production, and launch of the domestic pride campaign, to be paid for by the Treasury Board Secretariat in FY2026 Q3.

² Modernization of Ontario Travel Information Centres will result in permanent closure of 6 out of 9 travel information centres to pivot to delivering travel counselling services through alternate channels.

³ 1) Ontario; 2) U.S. short-haul/rubber tire [California, Illinois, Michigan, Minnesota, Wisconsin, Ohio, New York, Pennsylvania, Massachusetts, and District of Columbia]; 3) Manitoba; 4) Quebec; 5) United Kingdom; 6) Germany; 7) France; 8) China; 9) Japan; 10) South Korea; 11) Mexico; 12) Australia as planned currently, but subject to change.

⁴ Ministry of Infrastructure negotiated head office lease extension for three years from June 2025 to May 2028. DO received four months free base rent as part of lease negotiations.

⁵ Budget pressure will be risk-managed through ongoing evaluation of campaign performance and the reallocation or cancellation of initiatives as necessary.

⁶ DO received 4 temporary FTES from the ministry pool, expiring March 31, 2026. FTE count will be reduced by 2 temporary FTEs to 84.03 for the 2026-27 fiscal year, and return to DO's permanent FTE complement as of April 1, 2027.

OPERATIONAL CONSIDERATIONS

Capital Planning

Destination Ontario collaborates with the Ministry to manage asset capital planning across its portfolio. Destination Ontario works with Infrastructure Ontario (IO), a crown agency of the Government of Ontario, for the head office lease and the management of Ontario Travel Information Centres. The agency will continue partnering with IO and the Ministry to complete Threat Risk Assessments at all offices and special-purpose buildings, ensuring high-risk health and safety requirements are identified and addressed.

Operating Budget

Budget line items have been strategically aligned to support program delivery that meets our shared business objectives and industry expectations. Destination Ontario remains agile and may implement in-year adjustments to continue responding to the

evolving needs of the tourism sector. We operate within our allocated budget to maximize marketing return on investment, while retaining the flexibility to support Ministry priorities when incremental government funding is provided in advance.

IT AND ELECTRONIC SERVICE DELIVERY PLAN

Destination Ontario is supported by the OPS Information & Information Technology (I&IT) service, in line with our sponsoring ministry, Ministry of Tourism, Culture and Gaming. I&IT provides a comprehensive inventory of operational I&IT services including the provision of computing hardware and software, email services, mobile IT devices and services, and network infrastructure and access.

Destination Ontario established a comprehensive plan to maintain operational stability and ensure the timely recovery of critical functions during and after a cyber attack on the agency. Staff have completed cybersecurity training to develop good cyber hygiene practices to reduce the ministries vulnerability to cyber threats, and the agency has participated in the OPS corporate phishing campaigns offered through the Education and Centre of Excellence Unit. Destination Ontario has enrolled in targeted phishing campaigns and tabletop exercises to simulate cybersecurity incidents using specific and customized emails to target areas/teams based on the work they do. The simulation tested people/team processes for areas of improvement all within a safe environment so staff could learn to recognize threats and protect critical assets. Corporate Services staff also attend the OPS-wide cybersecurity community of practice (COP).

In collaboration with the OPS Cyber Security Division, Destination Ontario has catalogued all critical hardware, software and data assets and identified key personnel responsible for each asset and ensure they are protected by security safeguards appropriate to the sensitivity of the information.

The Agency's corporate website, DestinationOntario.com is consumer facing, providing travel resources on Ontario's tourism regions and suggested itineraries. The content on the website is kept up to date by staff. Maintenance and technical support of the website is carried out by internal staff and enhancements implemented according to the business needs of the Agency.

Ontario Travel Information Services (OTIS) Digital Service Delivery

OTIS delivers custom, personalized trip planning and visitor information services across multiple digital including phone, email, web chat, and virtual (video) and are available to consumers in both English and French, 7 days a week from 9am to 5pm ET.

DO has been gradually introducing digital service delivery channels to consumers for more than four years both to modernize and make trip planning more accessible. Starting in 2021, the 1-800-ONTARIO toll-free tourism phone service was brought in house (from third party vendor), and Virtual Travel Counselling (VTC) was piloted as a service delivery channel later the same year.

The transfer of consumer response email channel to the OTIS team followed the next year and after a successful pilot, VTC was implemented as a permanent channel. Last year, web-based chat was soft launched as a new digital channel.

Digital Service Delivery

As part of its modernization strategy, OTIS is continuing to expand and optimize its digital visitor service delivery channels. This transformation will continue to result in improved consumer satisfaction and a more consumer-centered experience through increased access across multiple channels, as well as the realization of process efficiencies and support sustainability efforts.

OTIS' digital services are human-powered and supported by digital tools and platforms such as Travefy, Zoom, Picktime, Deepl, Zendesk etc. AI tools such as MS Co-pilot and ChatGPT are also used for research and to assist with itinerary building.

OTIS has a digital knowledge library of more than 600 itineraries covering all Regional Tourism Organizations (RTOs) and themed by experience (i.e. family activities, food and drink, hiking, couples' getaways etc.) in addition to thousands of digital brochures and guides.

OTIS also offers consumers digital immersive video experience at roaming activations (i.e. festivals, events, attractions) through use of virtual reality goggles with 2D reels of Ontario themed tourism products and experiences.

Digital Channels

Virtual:

- Ontario is the first province to offer virtual video trip planning services (other provinces are now in the planning stages)
- Allows expanded reach and engagement with consumers in more international markets while they are still in the trip planning phase resulting in greater ability to influence itineraries and increase future incremental spend
- Accessible, personalized, digital channel that mirrors "in person" one-on-one experience

Web Chat:

- Allows real time engagement and on-the-spot trip planning for consumers who prefer in written communication in real time
- Previous research (Focus Research Group, 2019) shows that consumers are open to ideas to "fill in" their itineraries when travelling in market
- Recent OTIS service audit revealed that web chat and text were highly desired methods of receiving trip planning advice

Phone:

- Consumers can reach a live Travel Counsellor by calling 1-800-ONTARIO toll-free (North America wide) or clicking the widget at the bottom of the consumer website landing page (destinationontario.com)
- Phone calls are managed on the Zendesk platform which includes full reporting functionality on caller demographics, tracking for KPIs and dashboards
- Callers are connected to a live Travel Counsellor (no Interactive Voice Response (IVR) routing) on average in less than 60 seconds

Email

- Email trip planning is managed on Zendesk and average response time is less than 2.5 hours which far exceeds OPS Service Standard of 48 hours
- Transforms consumer fulfillment from paper to digital (digital itineraries, pdfs, etc.), providing consumers with direct links to tourism products and partner sites

2026-27 DIGITAL SERVICE DELIVERY PLANS

- Additional digital channels are being explored and piloted based on consumer research, behaviours and preferences as well as inter jurisdictional scans
- As OTIS migrates its digital platform from Zendesk to Amazon Connect in 2026 (in partnership with MPBSD), additional channels such as instant chat and text messaging will be explored
- Do will continue to build on transformational activity such as moving from appointment-based video chat to instant chat
- Improved digital platform will also allow measurement of consumer sentiment, smart routing of enquiries and ability to provide service in almost any language, supported by AI
- Improved user/customer experience and more seamless consumer journey through ability to move between channels and one “front-door” to all digital channels

ARTIFICIAL INTELLIGENCE (AI) & DIGITAL TRANSFORMATION

INVENTORY OF THE AGENCY’S ARTIFICIAL INTELLIGENCE USE CASES

Destination Ontario has limited use of AI technologies as it is leveraging AI in OTIS to enhance consumer trip planning through travel counseling and trip planning research. However, we recognize the transformative potential of AI in enhancing business efficiencies, data analysis, customer engagement, and decision-making processes.

Teams across the organization may explore its adoption in 2026-27 to enhance various functions, including:

- Create travel guides, itineraries, or blog posts that are more tailored to local and international audiences.
- Translate and adapt content to resonate culturally with audiences in different countries.

- Analyze competing destinations' marketing strategies by summarizing their social media, websites, or advertising campaigns.
- Assist with responding to emails or online inquiries from partners and tourists in their language.
- Generate content calendar suggestions with themes, hashtags, and timelines.
- Draft professional yet friendly responses to potential visitors' inquiries.
- Generate SEO-friendly keywords for travelers in different languages.
- Write compelling ad headlines and descriptions for Google Ads, Facebook, or Instagram.

As part of our forward-looking strategy, we are actively exploring opportunities to integrate AI into business processes. This includes identifying high-impact use cases where AI can deliver measurable value, such as personalized marketing, predictive analytics, and operational automation.

Destination Ontario undertakes a thorough assessment of AI applications relevant to our business needs, ensuring alignment with our organizational goals and compliance with all ethical and regulatory standards, including the Responsible Use of AI Directive.

RISK IDENTIFICATION, ASSESSMENT AND MITIGATION STRATEGIES

Likelihood Definitions:

Assessment	Level	Description
Rare	1	This event is very unlikely to occur (less than 5% chance).
Unlikely	2	This event is unlikely to occur (5% to 20% chance).
Possibly	3	This event is unlikely, but possible to occur (21% to 50% chance).
Likely	4	This event is very likely to occur (51% to 89% chance).
Almost Certain	5	This event is almost certain to occur (90% or greater chance).

Impact Definitions:

Assessment	Level	Description
Insignificant	1	• The impact can be absorbed through normal oversight activity with no senior management effort needed. • The achievement of objectives will not be impaired. • No impact on continuity of operations. • No impact on reputation.
Minor	2	• The impact can be absorbed with minor senior management effort in order to achieve objectives. • Minimal impact on continuity of operations. • Minimal impact on reputation.
Moderate	3	• The impact can be endured with active senior management effort in order to achieve the objectives. • Continuity of operations is somewhat affected. • Reputation is somewhat impacted.
High	4	• The impact can be endured with active and ongoing senior management effort and may impair the ability to meet objectives. • Continuity of operations is visibly affected. • Reputation is visibly impacted.
Very High	5	• The impact, even with senior management effort, will most likely lead to long-term or permanent damage to the ability of meeting objectives. • Continuity of operations is significantly impaired. • Reputation is significantly impacted.

Risk Rating = Likelihood x Impact

Level	Score	Description
High	20+	Significant management attention required.
Medium – High	11-19	Ongoing management review and discussion is necessary.
Medium	7-10	Limited management review required.
Low	1-6	Risk can be managed through existing oversight/routine procedures.

2026-27 ENTERPRISE RISK AND MITIGATION

	Objective	Risk Statement	Risk Category	Existing Controls	Likelihood	Impact	Risk Rating	Mitigation Strategies
1	Maximize return on investment of marketing activities and reach consumers who can travel to Ontario	External/ environmental factors and global and geo-political events (e.g., pandemic, inflation, economic downturn, changes in policies, elections), may have a negative impact on global travel patterns.	Delivery / Operational -	Destination Ontario employs a balanced portfolio approach to international marketing, focusing on priority markets of greatest opportunity for return on investment. This spreads risk across source markets.	Likely - 4	High - 4	Medium - High	Destination Ontario has some program flexibility to shift strategy to address environmental factors. Depending on the factors identified, there would still be an impact to results due to change (e.g., reduction of investment, market reach) to destination marketing. DO operates within its allocated budget to maximize marketing ROI and can be nimble to address Ministry priorities where incremental government funding is provided in advance, ensuring that planned investments in DO's focus markets are not impacted.

Objective		Risk Statement	Risk Category	Existing Controls	Likelihood	Impact	Risk Rating	Mitigation Strategies
2	Ensure the safety of electronic data for all Destination Ontario corporate staff and external website users	Modern business is conducted largely using web-based tools. Web based tools are subject to phishing, hacking and other cyber-attacks that expose Destination Ontario to external security/privacy breach.	Delivery / Operational - Technology	All data is encrypted. Monitoring and logging is in place to allow for visibility into the solutions security and access posture. Permissions are assigned using the least privileged principle. Application components and packages are routinely scanned for vulnerabilities. Staff are reminded of cyber risk associated with communication tools and web behaviour. Staff have tools available to draw attention to suspicious email activity through easy one-click reporting to central I&IT (Information & Information Technology). All endpoints are accessed through HTTPS.	Possibly - 3	Moderate - 3	Medium	Any new technology developed is reviewed by Provincial Government Privacy Impact Specialists; revisions are made based on their recommendation. Applications are designed and deployed within tier architecture for a logical separation of web and app data components for better security control. DO management and staff work with the OPS (Ontario Public Service) Cyber Security Operations Centre (CSOC) to identify network intrusion detection-prevention systems, and to detect and analyze threats to information security, such as worms, viruses, intrusion attempts, denial of service attacks, misuse, and security vulnerabilities. Targeted phishing simulation campaigns have been conducted to improve Destination Ontario's organizational resilience to cyber attack through staff awareness and training with the management team and all-staff. A Continuity of Operations Plan (COOP) has been updated to include actions for cyber security should a threat be detected. Implementation of the revised COOP was completed in October 2024.

Objective		Risk Statement	Risk Category	Existing Controls	Likelihood	Impact	Risk Rating	Mitigation Strategies
3	Measure and monitor Key Performance Indicators (KPIs) that are specific, measurable, achievable, realistic, and timely, to inform and improve program delivery and results	Ineffective or inappropriate performance measures can negatively impact program management and results. Investment and funding levels may impact the organizations' goals.	Delivery / Operational - Information	A dedicated marketing team reviews and provides direction on performance measurement, setting targets and reporting tools. Destination Ontario conducts stakeholder surveys, monitors, and responds to comments throughout the year. Campaign analysis and reporting is completed for campaigns.	Possibly - 3	Moderate - 3	Medium	Destination Ontario Management works with its marketing and analyst teams to assess marketing for effectiveness and efficiency. KPIs are reviewed regularly for currency and effectiveness. Where appropriate, new measures are added while fewer effective measures are discontinued.

Objective		Risk Statement	Risk Category	Existing Controls	Likelihood	Impact	Risk Rating	Mitigation Strategies
4	Deliver impactful marketing that maximizes performance results and value for money.	Increased annual cost year over year and inflation can result in decreased marketing impact in real terms over time which jeopardizes ability to maintain robust performance results for corporate Key Performance Indicators (KPIs).	Delivery / Operational - Environment	Destination Ontario works with its media Agency of Record in the design and delivery of large-scale omni-channel marketing campaigns that deliver on DO's overall market plans. This collaboration allows DO to leverage external industry experts and media insights to ensure best-in-class, informed, impactful marketing campaigns. Destination Ontario has secured an Agency of Record for two years with option to extend for two additional terms of up to one year each for a total of four years to an expiry date of June 3, 2028. Destination Ontario uses a collaborative approach with the Ministry and industry as a whole: Management works with internal and external clients to best deliver on ministry direction and its corporate mandate.	Possibly - 3	Moderate - 3	Medium	DO has invested significant time up-skilling internal Marketing team to continuously monitor and optimize digital campaigns. The emphasis on "real time" dashboarding and reporting allows for nimble optimization for all campaign work, ensuring cost-effective performance delivering on DO's KPIs. In consultation with DO's media agency of record, DO continuously evaluates and makes strategic updates to campaign planning, ensuring media plans deliver on DO's and partners' core objectives. To better understand the mindset of the consumer and to inform marketing recovery strategies, DO consults on various on-going proprietary tracking studies on consumer attitude and behaviour. Destination Ontario works with Advertising and Communications Services Procurement Branch (ACSPB) that is responsible for managing the Advertising and Marketing Communications Services Vendor of Record procurement to proactively request timely Treasury Board of Cabinet approval to procure these services per the agency's current Delegation of Financial Management Authority.

Objective		Risk Statement	Risk Category	Existing Controls	Likelihood	Impact	Risk Rating	Mitigation Strategies
5	Deliver effective marketing activities while complying with OPS I&IT standards	Inability to function effectively due to strict OPS I&IT standards created for protecting government and personal information.	Delivery / Operational - Technology	Destination Ontario seeks supplementary I&IT approval and exemption where appropriate to use applications restricted to the OPS to optimize marketing or business activities.	Possibly - 3	Minor - 2	Low	Where barriers are identified, Destination Ontario works with Ministry and broader OPS colleagues to enhance permissions for digital applications and data collection.
6	Effectively procure and enter into agreements with vendors/suppliers to support delivery of Destination Ontario mandate	Inability to enter into agreements for purposes of planning, measuring, analyzing, and purchasing online advertising space on digital and social media platforms due to contract clauses that increase Destination Ontario's contingent liabilities.	Policy - Policy Direction	The value related to the contingent liabilities cannot be quantified or estimated at this time; however, the overall risk of any liability materializing as a result is low.	Unlikely - 2	Minor - 2	Low	Destination Ontario has secured a Section 28 approval under the Financial Administration Act ("FAA"). This ensures continued compliance with the FAA while entering contracts that include clauses with contingent liabilities for instances where the vendor has declined to remove the clause.
7	Evolve and modernize Destination Ontario marketing activities to utilize the most up to date technological advances	Reluctance or delayed acceptance from industry stakeholders and partners as DO changes and evolves to using innovative marketing technologies.	Delivery / Operational - Technology	Destination Ontario has regular communication with key stakeholders like RTOs (Regional Tourism Organizations), DMOs (Destination Marketing Organizations) and sector associations.	Unlikely - 2	Minor - 2	Low	Destination Ontario provides support and guidance by means of education and licencing tools to support and enhance digital growth to its industry partners.

Objective		Risk Statement	Risk Category	Existing Controls	Likelihood	Impact	Risk Rating	Mitigation Strategies
8	Attract and retain best-qualified staff to effectively deliver Destination Ontario's mandate	Due to Bargaining Unit, salary caps, fixed headcounts FTEs (Full-Time Equivalents), Return to the Office (RTO) and Ontario Public Service hiring restraints, challenges exist in creating an organization that is structured to meet evolving needs of a marketing organization which includes attracting and retaining the best-qualified staff in a dynamic marketing and media environment. This may result in lower staff morale and less confidence from stakeholders.	Delivery / Operational - Human Resources	Destination Ontario Corporate Services has in-house human resource services and liaises with key Ministry partners to ensure agency needs are met in a timely manner, in addition to providing direct staff support and counseling.	Possibly - 3	Moderate - 3	Medium	Ontario Shared Services, Human Resources (HR) Advisory Services and Labour Relations provides enterprise-wide HR advice and services that enable the achievement of government priorities and business objectives by promoting strategies and practices for building an engaged and productive workforce. The Ministry's dedicated Strategic Business Unit (SBU) provides Destination Ontario senior executives with advice and services to support attraction and retention of diverse talent, build capacity to sustain a world class organization and engage employees to achieve results.

Objective		Risk Statement	Risk Category	Existing Controls	Likelihood	Impact	Risk Rating	Mitigation Strategies
9	Maximize value for money and return on investment of marketing activities within allocated budget	Agency's marketing investment for domestic and international markets outmatched by competing jurisdictions with large marketing budgets.	Financial - Forecast	Destination Ontario management works with a media planning and buying service to balance audience reach with scale of media buy budget. Performance targets are based on available budget.	Likely - 4	Major - 4	Medium - High	Destination Ontario undertakes a value for money assessment of all business lines as part of annual operational planning. Potential marketing investment reduction in some or all markets. (other jurisdictions have increased their budget) Destination Ontario reviews all the results of internal control assessments (including, where applicable, those related to outsourced services, reports from their internal audit function, the management letter of recommendations from its external auditor and any reports by the Auditor General) for identified deficiencies and takes appropriate actions to address identified deficiencies.
10	Strategically balance types of media buys to maximize highest return on investment	Higher media buying and production costs in traditional, yet effective media channels such as TV.	Financial - Market	Destination Ontario management works with its media planning and buying service provider to balance audience reach with scale of media budget, however, Ontario's tourism profile is reduced.	Likely - 4	Moderate - 3	Medium - High	Destination Ontario strategically targets markets of highest return, allowing for a focused approach.
11	Work with internal and external clients and deliver on Ministry direction and corporate mandate.	The risk of direction change for Destination Ontario due to reframing of the Ministry's tourism priorities.	Policy - Policy direction	Collaborative approach with the Ministry and tourism industry as a whole: Management works with internal and external clients to best deliver on Ministry direction and its corporate mandate.	Likely - 4	Moderate - 3	Medium - High	Destination Ontario continues to work with the Ministry to ensure that marketing initiatives are adjusted and aligned.

Objective		Risk Statement	Risk Category	Existing Controls	Likelihood	Impact	Risk Rating	Mitigation Strategies
12	Maintain positive public perception and maintain stakeholder satisfaction.	Regional representation on the Board of Directors. Change to physical location of operations may result in negative stakeholder/partner reaction.	Public Perception / Stakeholder - Reputation	Destination Ontario has regular communication with Ministry appointments staff on the desire to ensure balanced regional (and particularly northern Ontario) representation on its board. DO management works with the Ministry and Infrastructure Ontario on realty location decisions to plan for and to ameliorate potential stakeholder concerns.	Possibly - 3	High - 4	Medium - High	DO has created a Northern Marketing Committee for regional representation. Collaborative approach: DO management and staff regularly interact with Ministry appointments staff to communicate desire to have balanced regional representation on its Board. DO management works with the Ministry and Infrastructure Ontario on realty options and decisions.
13	Maintain positive social media presence.	Social media presence exposes Destination Ontario to negative external comments or inadvertent misuse by staff leading to public embarrassment.	Public Perception / Stakeholder - Reputation	Clear guidelines are posted for public and staff and social media is monitored on a regular basis and posts that do not meet the guidelines are removed.	Possibly - 3	Moderate - 3	Medium	Destination Ontario works with the Ministry's Communications team when potential public issues are identified to proactively address potential issues.
14	Understand public attitudes and behaviours in Canada and other countries to inform strategic and tactical planning	The global pandemic has resulted in significant negative economic impact causing noticeable changes in public behaviour and consumers are worried about their finances, job prospects, and are delaying major purchases including travel.	Public Perception / Stakeholder - Performance	Destination Ontario is using proprietary market research tracking to understand public attitudes and behaviours in Canada and other countries to inform strategic and tactical planning.	Likely - 4	Moderate - 3	Medium - High	Destination Ontario has program flexibility to shift strategy and adjust marketing tactics to address environmental conditions.

Objective		Risk Statement	Risk Category	Existing Controls	Likelihood	Impact	Risk Rating	Mitigation Strategies
15	Provide timely reporting to the Ministry	Failure to meet deadlines and requirements could contravene regulations and directives.	Governance / Accountability - Controllershship / Compliance	Collaborative approach with the Ministry on meeting accountability requirements.	Unlikely - 2	High - 4	Medium	Destination Ontario works with the Ministry to meet timelines and reporting criteria.
16	Comply with OPS policies and directives	Non-compliance with established OPS policies and directives may result in issues for: financial accounting, employee relations, accountability requirements, and reflect negatively on the organization.	Governance / Accountability - Controllershship / Compliance	Management reviews risk during quarterly management reports and year-end and in-year audits. The Audit Finance and Risk Committee of the Board of Directors reviews the Management Report on a quarterly basis to assure itself that appropriate processes are functioning effectively, monitor enterprise risks to which the organization is exposed, and that internal control is effective in managing risks to an acceptable level.	Unlikely - 2	Moderate - 3	Low	Corporate Services continues to regularly educate all Destination Ontario staff by means of 1:1 training, attending regular division level meetings, mandatory workshops on financial processes and business processes, etc. The Corporate Services team and as required OPS Legal, review all new agreements to minimize risk and ensure maximum accountability. Destination Ontario reviews all the results of internal control assessments (including, where applicable, those related to outsourced services, reports from their internal audit function, the management letter of recommendations from its external auditor and any reports by the Auditor General) for identified deficiencies and takes appropriate actions to address identified deficiencies.

Objective		Risk Statement	Risk Category	Existing Controls	Likelihood	Impact	Risk Rating	Mitigation Strategies
17	Address and implement recommendation on governance	Negative attention from stakeholders due to failure to address the recommendations of external reviews (e.g., mandate reviews).	Governance / Accountability - Controllershship / Compliance	Mandate review recommendations are implemented as and when appropriate. The Public Appointments Secretariate requires Board appointees to undertake Board Appointee training on governance and accountability. Board appointees receive Public Appointments Secretariat training on governance and accountability for public boards. Board and staff expenses are carefully reviewed for proper documentation and compliance with directives and Destination Ontario expense claim policy. Training is regularly provided to staff and board as needed.	Unlikely - 2	Moderate - 3	Medium	Destination Ontario works with Ministry colleagues to address any recommendations coming out of reviews. Destination Ontario takes a proactive approach in addressing and documenting Board and staff accountability requirements.

Objective		Risk Statement	Risk Category	Existing Controls	Likelihood	Impact	Risk Rating	Mitigation Strategies
18	Secure funding for capital needs	Historically, capital needs have been limited due to premises being leased and limited capital funding has been provided.	Delivery / Operational - Infrastructure	All Destination Ontario property arrangements continue to be managed by Infrastructure Ontario. Where substantial capital needs are identified, Destination Ontario works with the Ministry to apply for incremental funding through the Treasury Board.	Likely - 4	Moderate - 3	Medium - High	Threat Risk Assessments (TRAs) are undertaken with the guidance of Infrastructure Ontario. Identified threat risks are mitigated as appropriate through capital repairs and/or adjustments to premises. Capital funding for leasehold improvements will continue to depend on availability of funds from the Ministry. Due to the limited availability of funding, the Ministry prioritizes capital investments in projects that are considered currently critical (health and safety), that address code and legislation compliance, and that are considered at risk of imminent breakdown.

					Likelihood	Impact	Risk Rating	
Objective	Risk Statement	Risk Category	Existing Controls					Mitigation Strategies
19	Address the ongoing ACTRA issue	ACTRA and ICA have failed to renegotiate a National Commercial Agreement (NCA). This has resulted in a labour dispute that has been going on since 2022. Mediation between the opposing groups has been taking place since October 2022, but broke down in fall 2023. May 14, 2024 – ACTRA posted a news release stating, “The Hon. David Piccini, the Minister of Labour, Immigration, Training and Skills Development of Ontario, recognized that government agencies like “Destination Ontario, Metrolinx and OLG, do seek advertising services” and committed to “calling after Question Period the heads of all three agencies” to have a “conversation with them because I recognize that	Governance / Accountability - Controllershship / Compliance	Many Agencies, including Destination Ontario, use the Agency of Record (AOR) from the Ontario government's Creative Agency Vendor of Record (VOR). The government's master agreement does not mandate creative agencies to be ACTRA signatories.	Likely - 4	Moderate - 3	Medium - High	While a resolution between ICA and ACTRA is being negotiated, Destination Ontario must fulfill their mandate to market Ontario as a global tourism destination and therefore must allow their vendors to seek out ACTRA alternatives to casting. Destination Ontario will continue to pay any hired non-union talent at ACTRA rates in good faith. As soon as ACTRA talent is available, DO will work with its creative agency to use ACTRA talent in broadcast and radio productions.

Objective		Risk Statement	Risk Category	Existing Controls	Likelihood	Impact	Risk Rating	Mitigation Strategies
20	Ontario Travel Information Services (OTIS) Modernization Strategy	If the OTIS Modernization Strategy is not further advanced the Ontario Travel Information Centres (OTICs) will continue to fall into disrepair and require capital funding to maintain operations and the public will continue to have a negative perception of the province and issue complaints to the Minister/Ministry.	Delivery / Operational - Infrastructure Public Perception / Stakeholder - Reputation	DO consistently collaborates with Infrastructure Ontario (IO) and its sub contractors (BGIS) to repair and rehabilitate the most basic structural needs at the OTICs to be able to operate in a safe and secure environment for both the public and staff.	Likely - 4	High - 4	Medium - High	Continue to work with Ministry to further advance the Modernization Strategy that aligns with the OAGO recommendation and Minister's Letter of Direction. Continue to explore and implement the best options for modernization and service delivery alternatives such as roaming ambassadors, 1-800-ONTARIO phone line, email inquiries and virtual travel counselling services.
21	Artificial Intelligence (AI) - Conflicting policies with third-party vendors.	As the Government of Ontario's travel marketing agency, DO relies heavily on third-party vendors and partners, such as Google, who extensively use AI in their products and services. There is a risk that DO's internal AI policies may conflict with those of our vendors, which could lead to difficulties in carrying out operational needs and meeting DO's marketing objectives.	Delivery / Operational and Public Perception / stakeholder	DO has ongoing communication with third-party vendors and will continue to engage to clearly understand AI policies. DO regularly reviews agreements with vendors to ensure they align with DO and OPS policies and that they comply with relevant laws and regulations. DO will align internal policies with key vendors where possible, to minimize the risk of conflicts. DO will continue to provide training to staff to raise awareness of relevant policies and directives.	Unlikely-2	Minor-2	Low	Destination Ontario will continue to liaise with MTCG (including Legal Services when necessary) to understand the risks and implications of AI. DO will continue to ensure that the agency's operations are in accordance with formal OPS guidance on AI (outlined in the directive on the Responsible Use of AI). DO will continue to report on AI use cases to MTCG as requested, in alignment with the requirements as set out in the Agencies and Appointments Directive and Memorandum of Understanding (MOU)

Objective		Risk Statement	Risk Category	Existing Controls	Likelihood	Impact	Risk Rating	Mitigation Strategies
22	Use of Artificial Intelligence (AI) when travel counselling consumers and researching trip planning content	When utilizing AI to support consumer trip planning, there is a risk that outdated information or false information is provided to consumers looking for travel information. This could result in DO or the Ministry receiving complaints. The tourism industry is quickly adopting AI technology to support customer service and trip planning. Limits on Destination's Ontario's availability to access specialists and technology in this space may result in reputational challenges with stakeholders who are looking to us for thought leadership.	Delivery / Operational - Information	AI training is continuously provided to Travel Counsellors on a regular basis including the responsibility on staff to check fact and websites to ensure consumers are provided with the most up to date information for their travel plans.	Unlikely - 2	Minor - 2	Low	Continue to review and adhere to Ministry and OPS AI policies and continue to ensure updated training is provided to all travel counsellors on a regular basis. Develop a Destination Ontario specific policy as it relates to the tools used by the industry and the organization to add additional levels of compliance and transparency. Provide comprehensive training to staff regarding the appropriate use of AI.

Objective		Risk Statement	Risk Category	Existing Controls	Likelihood	Impact	Risk Rating	Mitigation Strategies
23	Maintain high profile and reputation as the Provincial Marketing Organization for Ontario.	When high profile opportunities, such as the FIFA 2026 World Cup or Rendez-vous Canada arise to promote tourism, resulting in increased expenditures and economic revenue for the province, there is a risk that without timely buy-in, Destination Ontario could not take action and lose the opportunity to increase tourism and tourism spending.	Public Perception / Stakeholder Reputation	DO monitors budgets and available funds through quarterly reforecasting for accuracy. While DO remains as nimble as possible within the available budget to reallocate funds to priority initiatives, proper advance notice is required to allow sufficient time for adjustments and approvals.	Likely - 4	Moderate - 3	Medium - High	DO carefully explores options related to these opportunities using available budget, including amplifying messaging and promotion through social media channels and maximizing partnerships, in the case that additional funds are not granted. DO continues to liaise closely with the Ministry to explore all options of support to capitalize on large-scale tourism opportunities.