

Reconnecting Ontarians: Re-emerging as a Global Leader



An action plan
for economic
and social recovery
through Ontario's
Heritage, Sport, Tourism
and Culture Industries



Table of Contents

- 3 A MESSAGE FROM THE HONOURABLE LISA MACLEOD**
Minister of Heritage, Sport, Tourism and Culture Industries
- 7 WHAT WE DO**
The role of the Ministry of Heritage, Sport, Tourism and Culture Industries
- 10 WHERE WE WERE**
Delivering a spectacular double bottom line for the benefit of all Ontarians
- 15 WHERE WE ARE**
The COVID-19 triple threat and its devastating impact on the sectors
- 22 WHERE WE ARE GOING**
Resiliency and recovery
- 32 RECONNECTING ONTARIANS**
Re-emerging as a global leader
- 36 A PATH TO ACTION**
- 43 A CALL TO ACTION**
Share your ideas with us
- 46 APPENDIX 1**
- 53 APPENDIX 2**



A Message from the
Honourable Lisa MacLeod
Minister of Heritage, Sport, Tourism
and Culture Industries

The world is now in the midst of a generational crisis and Ontario is not immune.

COVID-19 is a novel threat, one easily transmitted and not impeded by our bodies' natural defenses. In addition to being easily spread, the impact of the virus can seem unequal and unfair. For some, the virus's symptoms are relatively mild. For others, the symptoms are severe enough to require hospitalization. Tragically, for more than 3,800 people in our province, the virus has proven to be fatal.

COVID-19 is more than a disease. It is also the agent of a global economic calamity that has tightened borders, shuttered businesses and driven millions of people out of work. And as with the disease itself, this economic hardship is unfairly distributed – certain sectors and businesses are much more vulnerable to the risk of collapse than others.

Nowhere is this risk more evident than in the heritage, sport, tourism and culture industries overseen by my Ministry. For these sectors, and for the people who work in them, COVID-19 has emerged as a truly existential threat. When the COVID-19 outbreak began, Ontario's heritage, sport, tourism and culture industries were among the first and hardest hit. They're expected to take the longest to recover.

These are "high-touch" sectors that depend on gatherings of people.

Live musicians and theatre companies, arts and cultural festivals, all depend on audiences and the participation of large crowds.

Sport leagues and organizations need spectators and require close contact between competitors.

Tourism operations require visitors from beyond our borders.

Airlines and boat tours need to fill the majority of their seats, bringing passengers in close proximity for prolonged periods of time.

Customers of hotel, meeting and event venues or restaurants and heritage sites need to feel confident that they can safely gather in a common location.

All these sectors were built on a mutual understanding that our society works best when we can come together and share experiences in a way that enriches our economy, our society and the lives of every one of us. They are uniquely impacted by the spread of a disease that requires social distancing if we are to defeat it.

Beyond illness and economic hardship, this pandemic has robbed all of us of the ability to share experiences and make memories within and between our diverse communities. It is a true triple threat – a public health, economic and social crisis rolled into one.

Ontario's Action Plan: Protect, Support, Recover sets out \$45 billion in support over three years to continue protecting people's health and to support individuals, families and job creators impacted by the virus, while building the groundwork for long-term economic recovery.

Strategic and targeted investments in tourism, music, arts, film and television, book and magazine publishing, museums and galleries, and sport and recreation activities will continue to protect and support our sectors as they rebuild, transform and invest in opportunities in their local communities, leading to long-term recovery.

Supporting opportunities in local communities will lead to economic and social recovery for all of Ontario, ensuring we safely emerge post-pandemic as a global destination of choice.

Under the leadership of Premier Doug Ford, our government has remained focused on three priorities throughout the pandemic:

Protect: We must do whatever it takes to save lives and protect the health and safety of Ontarians throughout this crisis. This has often required us to make difficult and painful decisions, ones that have resulted in temporary restrictions on economic activity in many of the sectors that fall under my Ministry. We did not make these decisions lightly; we acted when we were convinced that a failure to do so would put lives at risk.

Support: We must continue to do everything we can to support the businesses, communities and jobs that have been hit the hardest. We have done this by taking steps to ensure businesses and organizations have the support they need to survive and adapt to a new way of life and a new way of doing business during the pandemic. At every step of the way, the Premier and I have remained steadfast in our commitment to using the full resources of the Government of Ontario to help sustain the jobs, businesses and community organizations that have been impacted by the measures taken.

I am particularly grateful for the consistent advice and counsel of those who live and work in the sectors my Ministry oversees. In the earliest days of the pandemic, we moved quickly to create 14 Ministerial Advisory Councils (MACs) representing

a wide scope of sectors to plot a shared response to the economic challenges of this pandemic. I want to thank the members of these MACs for their leadership and selfless service to our province. I also want to thank the tens of thousands of people from across Ontario who took part in the 12 tele-town hall updates I have hosted since the crisis began.

Recover: This White Paper will inform a five-year plan with the view of ensuring the medium- and long-term recovery of the heritage, sport, tourism and culture industries.

Any plan to rescue and support these sectors must consider our new social reality – and not only our recovery from the immediate crisis. For those who depend on our heritage, sport, tourism and culture sectors for their livelihoods, the long-term economic damage from the COVID-19 pandemic will extend far beyond any short-term measures we take to combat it. This is because the virus is already changing our individual behaviors in significant, long-lasting ways.

The pandemic is changing us.

We have become anxious about congregating in small crowds and less confident about engaging in experiences outside our immediate local comfort zones. Some of these anxieties are well-founded and based on solid public health guidance; others are rooted in more generalized fears. No matter how substantiated, these behavioural changes are very real and could endure, affecting our personal and social habits until a vaccine has been widely distributed, and perhaps longer.

We must plan for long-term renewal driven by the industry and supported by the government, designed to restore confidence in these sectors and in the businesses, organizations and people who work in them. It is my hope that this document will help prompt the kind of conversations needed – both inside and outside of government – to get this long-term renewal underway.

The economic recovery and renewal in the industries my Ministry oversees will only occur through collaboration and innovation. To the owners of every restaurant who quickly pivoted to delivery service, to every musician who moved their concerts online, to every museum and tourism operator who found ways to provide more digital experiences: thank you. We are all grateful to the festivals and community events that harnessed new social and digital networking tools to keep people connected, the filmmakers and content creators who found ways to keep us entertained during the long weeks we were largely stranded at home, and to everyone who used their talents and experiences to keep us connected, uplifted, optimistic and proud, no matter how dark the news of the day had been.

The true strength of Ontario lies in our people; our resiliency, our creativity, our generosity and our community spirit are stronger than any virus. This was true before the pandemic, it is true today, and it will be true long after COVID-19 is

relegated to the history books. My job, the job of the hardworking public servants in my Ministry, and the job of our entire government, is to do everything we can to help these remarkable people not only survive but succeed, no matter what challenges and changes may stand in their way.

Before the start of this pandemic, I liked to refer to the spectacular “double bottom line” that our heritage, sport, tourism and culture industries provided the province. There is both a financial bottom line through which the people who work in these sectors generate hundreds of thousands of jobs and billions of dollars in economic activity, and a social bottom line in which all these sectors enrich Ontario as a vibrant, dynamic, diverse and inclusive place to live. They allow all of us to experience Ontario as the world in one province and I am determined to keep it this way.

I view this White Paper as more than a plan to support and strengthen a set of sectors. This is a plan to support and strengthen our entire province as a place to live, to work, to visit, to explore – as a place all of us can be proud to call home. No matter where you live in our province, this is the Ontario we all want to see. It is an Ontario that remains as strong as the people who work in sectors that remain vibrant despite the current hardships. No matter the challenges ahead, I remain confident that the future is very bright – for these sectors – and for the province.



The Honourable Lisa MacLeod
Minister of Heritage, Sport, Tourism and Culture Industries

What we do

The role of the Ministry of Heritage, Sport, Tourism and Culture Industries

Ontario's Ministry of Heritage, Sport, Tourism and Culture Industries is responsible for overseeing the social, economic and cultural activities across sectors that are key to Ontario's success. It operates with a clear mandate to *improve quality of life and promote economic growth by supporting and delivering tourism and cultural experiences, supporting the arts and cultural industries and championing participation in sport and recreation activities across Ontario.*

The Ministry oversees and is accountable for some of the province's best-known cultural institutions that together attract millions of visitors every year, including the Art Gallery of Ontario, the Royal Ontario Museum, and the McMichael Canadian Art Collection. The Ministry also promotes the preservation of the province's natural beauty through the Royal Botanical Gardens, the Niagara Parks Commission and the St. Lawrence Parks Commission. Through the Ontario Heritage Trust and iconic sites like Ontario Place, Fort William Historical Park, Sainte-Marie among the Hurons, and Discovery Harbour, we preserve Ontario's heritage for generations to come. We teach Ontario's children about science at our world-class facilities, the Ontario Science Centre and Science North. Finally, we help bring the world to Ontario at the Metro Toronto Convention Centre and the Ottawa Convention Centre.

In every corner of the province, the Ministry partners with local communities to support cultural festivals and events, promote the arts and creative economy, realize economic opportunities from tourism and champion active lifestyles, sport and recreation.

In 2020, the Ministry supported more than 250 festivals, 176 heritage organizations, 375 public libraries, 166 community museums, 13 regional tourism organizations, and the province's Indigenous sport and wellness programs.

With support from the Ministry's agencies – Ontario Creates, the Ontario Arts Council, Ontario Trillium Foundation, and Destination Ontario – our programs support the best Ontario has to offer. Our musicians top charts. Our athletes top podiums. Our film and television productions top ratings, and our top tourism destinations are recognized across the globe.

All together these sectors represent the largest volunteer force in the country that work to support the ultimate small business sector, while building some of the most recognizable brands on the planet.

Heritage

We provide grants to organizations working to preserve Ontario's rich history for generations to come. As well, together with our agency, the Ontario Heritage Trust, the Ministry is encouraging more Ontarians than ever to engage with our province's heritage through signature programs and activities. These supports include grants and programs like Provincial Heritage Organization Grants, and the Heritage Organization Development Grants. The Ontario Heritage Trust also helps Ontarians learn about our province's rich history through its over 90 heritage properties and the Ontario Heritage Act Register and iconic events like Doors Open Ontario.

Sport

Our Ministry offers unparalleled support for sport and recreation, sport hosting, and our professional and amateur athletes. In addition to supporting 66 Provincial Sport partners through the Ontario Amateur Sport Fund, we are investing in Ontario athletes from playground to podium. Quest for Gold, Games Ontario, and the Ontario Sport Hosting Program support Ontario athletes competing at the highest levels. We also encourage sport and recreation in Indigenous communities through the Sport Pathway for Ontario Native Wellness, Youth Cultural Camps and the Community Aboriginal Recreation Activator Program. Through programs like these, sport and recreation will continue to be at the heart of Ontario's communities.

Tourism

The Ministry supports Ontario's tourism industry through our agency, Destination Ontario, and as the primary funder of Ontario's 13 Regional Tourism Organizations. Tourism is a vital part of Ontario's economy, and it will be a vital part of our recovery. Funds like the Tourism Economic Development and Recovery Fund and the Reconnect Festival and Event Program are helping the sector begin its path to recovery. Our support extends through a variety of programs and grants, including Celebrate Ontario and the Ontario Signature Experiences Program.

Culture

Our Ministry supports Ontario's vibrant culture through its agencies, including the Ontario Arts Council, Ontario Creates, and the Ontario Trillium Foundation. The Ministry funds cultural attractions and major events, as well as a wide variety of grants that support arts and cultural industries in communities across the province. Supporting cultural programming is a central part of our mandate, from public libraries across Ontario to community museums, and we do that through programs like the Ontario Cultural Attractions Fund and Community Museum Operating Grants. We support public libraries through a number of grants, including the Public Library Operating, Pay Equity and the First Nations Salary Supplement Grants.

Additionally, the Ontario Trillium Foundation through an annual allocation in excess of \$100 million supports communities across Ontario through Seed, Grow and Capital Grants, the new Resilient Communities Fund, and the Youth Opportunities Fund to support thousands of non-profit organizations working to improve our communities across the province. Through our \$60 million annual support for the Ontario Arts Council, our Ministry continues to invest in the province's social fabric that our artists and creators work to strengthen each and every day.

The Ministry also supports our creative sectors through a suite of five cultural media tax credits administered through our agency, Ontario Creates. Through numerous granting programs and tax credits, Ontario Creates works with the Ministry to grow capacity in Ontario's film and television, book and magazine publishing, interactive digital media and music production sectors to create jobs for thousands of above and below the line talent across the province.

Where we were

Delivering a spectacular double bottom line for the benefit of all Ontarians

An economic bottom line: *Contributing \$75 billion in economic activity and hundreds of thousands of jobs across the province.*

A social bottom line: *Contributing to our quality of life, our diversity and our sense of unity and community spirit.*

Before the onset of the COVID-19 pandemic in March 2020, the businesses, workers and community organizations behind Ontario's heritage, sport, tourism and culture industries were a source of immense economic strength and cultural pride for the people of our province.

These industries helped position Ontario as "The World in One Province" with diverse experiences that made Ontario an attractive destination for visitors from abroad, while offering an unparalleled quality of life for the people who live here.

As a result of the creativity, ingenuity and hard work of countless individuals, businesses and organizations, the sectors overseen by the Ministry have delivered a spectacular double bottom line to Ontario.

How Much is \$75 Billion?

Ontario's heritage, sport, tourism and culture sectors generated \$75 billion in economic activity before the onset of the COVID-19 pandemic. To put this into context, this is:

- Larger than the GDP of Manitoba
- Larger than the economic impact of Ontario's mining, forestry and agriculture sectors combined
- Larger than the GDPs of small countries such as Luxembourg, Ghana and Panama

The Economic Bottom Line ... in our own words

“In 2019, the Ontario government gave Pride Toronto a \$250,000 grant, and in turn Pride Toronto generated \$61.5 million in provincial taxes alone. That is a return of over 24,600%. Warren Buffett would kill for something like that. And our economic effects go far beyond taxes: Visitors to Pride last year spent over \$72 million on restaurants, hotels and transportation; three sectors that have been hardest hit by the COVID pandemic, and tourism has played a big part in that.”

– Ande Clumpus, Treasurer, Pride Toronto

“The Ontario Government and Minister Lisa MacLeod’s continued budgetary support of Ontario’s film and television tax credits is a critical accompaniment to our sector’s strong recovery and continued growth. While producers globally marvel at our skilled labour, diverse locations and leading infrastructure, now they can see quite plainly Ontario’s leading role in partnering with industry to protect and enhance the explosive economic and jobs impact that we bring to the table.”

*– Jim Mirkopoulos, Vice President,
Cinespace Studios, Toronto*

“When the minister asked the CFC to host meetings with experts last September to identify the challenges of our industry, COVID-19 was not one of them. Film and television production were at record levels: over 340 productions, 44,500 jobs, \$2.16 billion in spending and 40% of that on domestic production. The Doug Ford government was stepping up investments in studios and projects, with a vision to boost annual production spending above \$5 billion. That lofty goal seems more in the distance now.”

– Slawko Klymkiw, CEO, Canadian Film Centre

The **tourism** sector has become a driving force of economic activity across the province. In 2017, tourism receipts in Ontario reached \$36.1 billion, supporting more than 401,000 jobs across the province.

The **cultural** sector not only celebrates Ontario's rich heritage and diverse communities, but it also has become a lasting source of economic strength. The sector contributed \$26.8 billion to Ontario's GDP and supported over 277,430 jobs.

The **sport, recreation and leisure** sector – which spans everybody from the 2019 NBA World Champions, the Toronto Raptors, all the way to local community youth recreational soccer associations – also drove billions in economic activity. The sector contributed \$12.6 billion to Ontario's GDP and supported almost 40,000 jobs.

Perhaps most importantly, the economic benefits generated by these sectors were broadly dispersed across the province. In every region and virtually every municipality, local businesses, community organizations, workers and jobs depended on tourism, cultural and sport activities.

The social bottom line: making Ontario the best place to live, work, visit and play

As impressive as the economic bottom line of these sectors has been, it has been exceeded by the contributions that our heritage, sport, tourism and culture industries make to the quality of life for all Ontarians.

In every corner of Ontario – rural and urban, north and south – we saw this social bottom line play out through the tireless efforts of local volunteers, community organizations, workers and businesses coming together to make our province a better place to live, work, play and raise a family.

Ontario's heritage sector brought Ontario's storied past to all of us through historic sites and experiences like Sainte-Marie among the Hurons, Uncle Tom's Cabin Historic Site, Upper Canada Village, Fort William Historical Park, and more. It tells stories of the First Peoples through thousands of archaeological and heritage sites. The sector salutes our heroes with monuments like the new Memorial to Honour Canadian Heroes of the War in Afghanistan. It honours our storied past through community museums proudly showcasing our history such as the War of 1812 and the founding of basketball through the James Naismith Museum in Almonte, Ontario. It represents the many wetlands, woodlands, grasslands and geological land formations that create our invaluable natural heritage.

Ontario's arts sector was a source of creative inspiration that made our communities more lively and dynamic places to live, by celebrating the 100th Anniversary of the Group of Seven at the McMichael Gallery, diving into Indigenous music and culture at the Wake the Giant Music Festival, enjoying a Toronto Symphony Orchestra performance, taking in Yayoi Kusama's Infinity Mirrors at the Art Gallery of Ontario, and more. Programs such as Port Hope's Critical Mass: A Centre for Contemporary Art or Festival Players of Prince Edward County help bring our communities to life and enrich our experience, cultivating a pride of people and place.

Ontario's cultural sector helped bring the world to one province and across cultural events. The Toronto International Film Festival, the Wiikwemkoong Annual Cultural Festival, the TD Ottawa Jazz Festival and Thunder Bay's Franco-Festival were some of the thousands of festivals and events that helped us connect with our communities, while Ontario's film and television sector brings our imagination to life through award-winning productions such as Schitt's Creek, The Umbrella Academy, and The Handmaid's Tale. Ontario's culture sector helped connect us to one another while celebrating Ontario as one of the world's most diverse and inclusive places to live. Ontario's public libraries kept us connected to our communities and the world, providing access to information and technology, supporting newcomers and job seekers, and serving as community hubs with programs for children and families.

Ontario's volunteer sector is the largest in the country. Through sport, festivals and events and our volunteer and not for profit initiatives, volunteers are a vital part of our social fabric. Volunteers give to our communities day in and day out, providing comfort to the sick, companionship to the elderly, and coaching and mentoring for youth, and their efforts shape our communities across the province and our country. Our government is honoured to recognize the efforts of these great citizens and neighbours in many ways through the Volunteer Service Awards.

Ontario's sport and recreation sector helped bring communities together and foster local pride through historic achievements by our professional sport teams, and players like Ontario's own Bianca Andreescu, the first-ever Canadian to win a Grand Slam singles title at the 2019 U.S. Open. Supporting athletes from playground to podium is an important part of making Ontario one of the best places to train, compete and play sports. Athletes such as Olympic medalists Penny Oleksiak, Andre De Grasse, or men's wheelchair basketball player Patrick Anderson inspire us all to strive for success while encouraging all of us to live healthy lifestyles, goals we support through Ontario's After School Program and the Ontario Games.

Ontario's tourism sector exemplified that Ontario is the world in one province. The tourism industry celebrated Ontario's diversity of experiences, history, traditions and natural beauty. It attracted international visitors from across the globe and instilled

pride of place for Ontarians. Tourism enhanced communities and brought Ontarians and visitors together through a shared appreciation of our unique and diverse people and tourism offerings. From our beautiful beaches to our welcoming towns to our bustling cities, Ontario was well positioned as a destination of choice to attract visitors from around the globe.

The Social Bottom Line ... in our own words

“Book and magazine publishers are a vital part of our literary lifeblood and the continuing support from funders like the Ontario government is crucial to ensure our cultural ecology of writers, publishers, bookstores and festivals survives, and begins to thrive again.”

*– Roland Gulliver, Director,
Toronto International Festival of Authors*

“The organization I am representing today has received annual Celebrate grants and has been awarded three Blockbuster grants for pan-provincial events that we’ve produced. Without the support of Celebrate Ontario, these events, specifically the pan-provincial events, would never have happened.”

*– Lea Parrell, Co-Producer,
Water’s Edge Festivals and Events*

Together, the people who work in these sectors built a made-in-Ontario success story, one that supported our pride of place and encouraged our immense diversity, all while helping the broader economy grow.

Where we are

The COVID-19 triple threat and its devastating impact on the sectors

On March 12, 2020, Minister MacLeod was expected to join Beth Potter, President and CEO of the Tourism Industry Association of Ontario, to announce the tourism industry had grown to \$36 billion across the province. Unfortunately, the growing global COVID-19 pandemic made that announcement impossible.

Recognizing the urgent crisis presented by the outbreak of the novel coronavirus, Premier Ford acted on public health advice, ordering the shutdown of the province's schools, making Ontario the first province in Canada to do so. The federal government, provinces and local municipalities imposed broad restrictions on mobility and economic activity that included sharp restrictions on domestic and international travel, as well as the closure of the Canada-U.S. border in response to COVID-19.

The impact of COVID-19 on the heritage, sport, tourism and culture industries was further exacerbated by a rapid deterioration in public confidence as more people pulled back from routine activities out of fear of contracting the virus.

Destination Canada public opinion research suggests Ontarians continue to feel hesitant about the safety of travelling to cities and towns outside of their region.

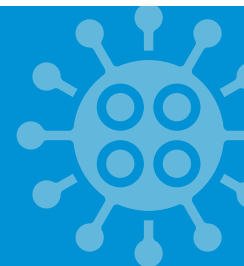
Willingness to welcome visitors travelling to their community is also low.

The December 1, 2020, Leger's North American Tracker suggests 73% of Ontarians are changing their holiday plans to adapt to COVID-19 with 63% of Ontarians suggesting they support a total ban on holiday gatherings with anyone outside of our own household.

Additionally, 64% of Ontarians say they are afraid of contracting the virus while 34% believe the worst days of the pandemic are still ahead. Only 9% of Ontarians believe that the worst is behind us.

These feelings of fear and anxiety around the virus, which began almost immediately in March 2020, continue to worsen the economic and social crisis in Ontario.

Where we were: Ontario's comfort and our sectors



SNAPSHOT: MAY 2020

During May 2020, a number of organizations surveyed the Canadian public to gauge their sentiments on a variety of behaviours that had been affected by the COVID-19 pandemic. Organizations and individuals were also surveyed to learn about how the pandemic has affected their financial status.

ONTARIANS WERE RELUCTANT TO TRAVEL

25% of Canadians
felt safe staying
in a hotel



20% of Canadians
felt comfortable
taking a flight



1/3 of arts, recreation
and culture sector
organizations temporarily
or permanently ceased
operations

OUR SECTORS WERE HIT HARDEST

ONTARIANS WERE RELUCTANT TO DINE OUT

24% of Canadians
felt safe eating
at a restaurant

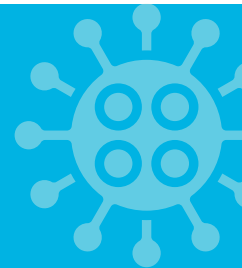


14% of Canadians
felt comfortable
attending
in-person events

ONTARIANS WERE RELUCTANT TO GATHER

Sourcing: 1) Deloitte. (2020, May 30). Deloitte State of the Consumer Tracker. Retrieved December 15, 2020, from <https://www2.deloitte.com/us/en/insights/industry/retail-distribution/consumer-behavior-trends-state-of-the-consumer-tracker.html>
2) Government of Canada, Statistics Canada. (2020, May). Canadian Economic Dashboard and COVID-19. Retrieved December 15, 2020, from <https://www150.statcan.gc.ca/n1/pub/71-607-x/71-607-x2020009-eng.htm?HPA=1>
3) Government of Canada, S. (2020, May). Canadian Survey on Business Conditions: Impact of COVID-19 on businesses in Canada. Retrieved December 15, 2020, from <https://www150.statcan.gc.ca/n1/daily-quotidien/200429/dq200429a-eng.htm>

Where we are: Ontario's comfort and our sectors



SNAPSHOT: NOVEMBER 2020

During November 2020, a number of organizations surveyed the Canadian public to gauge their sentiments on a variety of behaviours that had been affected by the COVID-19 pandemic. Organizations and individuals were also surveyed to learn about how the pandemic has affected their financial status.

ONTARIANS ARE STILL RELUCTANT TO TRAVEL

31%

of Canadians feel safe staying in a hotel overnight



19%

of Canadians feel safe taking a flight



79.1%

of Ontario charities are concerned or somewhat concerned about closing due to a lack of donations

OUR SECTORS WILL TAKE THE LONGEST TO RECOVER

ONTARIANS ARE STILL RELUCTANT TO DINE OUT

32%

of Canadians felt safe eating at a restaurant



12%

of Canadians feel comfortable attending in-person events

ONTARIANS ARE STILL RELUCTANT TO GATHER

Sourcing: 1) Deloitte. (2020, November 4). Deloitte State of the Consumer Tracker. Retrieved December 15, 2020, from <https://www2.deloitte.com/us/en/insights/industry/retail-distribution/consumer-behavior-trends-state-of-the-consumer-tracker.html>
2) Nanos, N. (2020, December 12). Data Dive with Nik Nanos: How the pandemic could devastate the charitable sector. Retrieved December 15, 2020, from <https://www.theglobeandmail.com/opinion/article-data-dive-with-nik-nanos-how-the-pandemic-could-devastate-the/>

The cumulative impact of these measures was pronounced. Across a wide range of industries within the sectors the Ministry oversees, we have seen staggering declines that continued after the province began a staged economic re-opening during the summer.

- International border crossings to Ontario declined 95% in September 2020 compared to September 2019 and were down 82% for the period January to September 2020 compared to the same period in 2019.¹
- In October 2020, Tourism Economics estimated that international travel spending will fall by 90% in both Toronto and Ottawa-Gatineau in 2020.²
- According to a Tourism Industry Association of Ontario survey conducted in May 2020, more than 65% of tourism businesses were temporarily closed.
- For the nine months ending September 2020, the average hotel occupancy rate in Ontario was 36.7%, down from 70.2% in the first three quarters of 2019. Among the hardest hit areas this year are downtown Toronto and Niagara Falls, where the average hotel occupancy rate for the first three quarters of 2020 was 26.2% and 29.1%, respectively.³
- For March to October 2020 compared to the same period in 2019, the proportion of job loss in Ontario's tourism-related industries was greater (-27%) than in all industries in Ontario (-7%).⁴
- In March 2020, Indigenous Tourism Ontario projected the following losses in Ontario (at a minimum): \$330 million in lost revenue, with the closure of 140 Indigenous tourism businesses and the loss of 4,000 jobs in Indigenous tourism.
- The total lost revenue for agencies and attractions was over \$265 million for 2020-21.⁵
- Sales in Ontario's food services and drinking places subsector declined 24% in September 2020 compared to September 2019, with Ontario experiencing the largest year-over-year sales decline in dollar and percentage terms of all the provinces and territories.⁶
- There were 18% fewer active businesses operating in the accommodation and food services sector and 20% fewer active businesses operating in the arts, entertainment and recreation sector in Ontario in August 2020 compared to August 2019.
- In April, 94% of stakeholder organizations surveyed by the Ontario Arts Council say they had cancelled or postponed events.⁷
- Eight of Toronto's largest arts and culture organizations estimated they will collectively lose \$90 million in revenue in 2020.⁸

- Interactive digital media companies reported an average decline of 38% in revenue as compared to the national average decrease in revenue (29%).⁹
- Film and TV has seen at least \$713 million in direct production spending lost for the year. An average of 45,000 workers employed directly or indirectly were out of work each month while productions were shut down in the spring.¹⁰
- Almost half of music artists had lost more than 75% of their income.¹¹ In March 2020, companies in the music industry expected to lay off 75-100% of their employees.¹²
- Magazine publishing revenues are expected to be down in 2020-21 by 30% or more, and many companies have laid off as much as 30% of their staff.¹³
- Ontario's domestically owned book publishers are expected to incur \$6 million in lost revenue in the first six months of the pandemic. 27% of full time or contract staff employed at Ontario publishing houses have been laid off.¹⁴
- According to an Ontario Museum Association survey, museums lost approximately 75% of their revenue on average between March and July 2020 when compared with 2019. During this same period, over 400 museum workers were laid off and only 42% of laid off workers have been recalled.¹⁵
- The Ministry estimates that the 166 museums funded by its operating programs lost approximately \$8.1 million in revenue from March to June 2020.¹⁶ Museums across the province lost an estimated \$48.3 million in revenue in that same period.¹⁷
- The Canadian Parks and Recreation Association estimates that every month that recreation facilities remain shuttered costs Canadian municipalities a combined \$221 million.¹⁸
- Lost revenues to the professional sports industry in Ontario in 2020 are estimated to include more than \$500 million in direct losses, with total direct and indirect impacts on the economy exceeding \$1.2 billion.¹⁹
- Most of Ontario's Provincial Sport Organizations and Multi-Sport Organizations anticipate revenue losses of between 20–60%.²⁰

While the province was able to enter a staged re-opening throughout the summer of 2020, several industries overseen by the Ministry continued to struggle to rebuild consumer confidence while remaining compliant with new public health guidelines and accounting for changes in social behaviour. In addition, some industries were not permitted to open yet or still had restrictions (e.g., amusement and waterparks, meeting and event spaces).

These challenges became more pronounced in fall 2020 when a renewed second wave of COVID-19 cases required the re-introduction of economic restrictions that were previously relaxed. Heritage, sport, tourism and culture industries faced additional restrictions in some of the most populous regions of the province. Toronto, Ottawa and Peel were each subjected to modified stage two restrictions. Since then, Ottawa has seen an easing of restrictions, however Toronto, Peel, Windsor-Essex and York Region are now in Lockdown as of December 14, 2020. This new wave of COVID-19 has driven health, social and economic anxiety among consumers in Ontario threatening the halting steps to economic recovery already in place.

The Impact of COVID – in our Own Words^{21 22}

“Over 300,000 hospitality employees are laid off or not working any hours. Some 50% of Ontario’s hotels have been closed, and those staying open operate with a skeleton staff largely accommodating essential service needs. We are seeing 94% year-on-year revenue declines. Nearly half of all single-unit restaurants are temporarily closed. Ontario’s food service industry is on track to lose around \$7 billion in sales just this second quarter.”

*— Tony Elenis, President and CEO,
Ontario Restaurant Hotel and Motel Association*

“In 2019, the [Shaw Centre] hosted 455 events, generated 1,795 jobs, generated taxes in the amount of \$60 million ... and injected \$150 million in total spending into the community. As a convention centre, we employ more than 300 employees, of which 95% have now received temporary lay-off notices. As of March 24, all events have been cancelled through to October, and we’re now fielding cancellations for the end of the calendar year. Our building has been mothballed ... It is anticipated that the meetings and convention business will take three to four years to fully rebound. 2020 has devastated us as an industry, and waiting it out just to get to better times is financially challenging.”

*— Nina Kressler, CEO,
Shaw Centre (Ottawa)*

“The September festival—the largest revenue driver for the Toronto International Film Festival—was precariously positioned in a difficult economic environment. We face a COVID-19-induced revenue shortfall of \$21 million for 2020 alone . . . almost half of our operating budget ... TIFF's future is at risk ... and it's not just TIFF. There are real impacts for our festival suppliers as well, which has a ripple effect across the economy. Suppliers will be renting less AV equipment, fewer tents for the street events, fewer bookings in restaurants and hotels, and so on.”

*— Cameron Bailey, Artistic Director and Co-Head,
and Joana Vicente, Executive Director and
Co-Head, Toronto International Film Festival*

“There's no sugar-coating it. COVID-19 has been nothing short of devastating to the aviation sector. Nearly half of Canada's aviation industry is based in Ontario, and as a result of COVID, the industry has grounded most of its aircraft and shuttered terminal facilities, and tens of thousands have been laid off. Airport revenue is expected to drop by more than \$2 billion nationally in 2020.”

*— Lorrie McKee, Director, Public Affairs and
Stakeholders, Greater Toronto Airport Authority*

“The Chelsea Hotel is Canada's largest hotel by room count. We're just 10 rooms shy of 1,600 rooms, coming in at 1,590. We have 615 terrific hospitality professionals who work with us here at the Chelsea. In 2019, the hotel ran 78%, but perhaps in terms that make more sense, 452,573 occupied rooms had a revenue of \$96 million. Now, if we take a look to this year, we are running, right this month, an occupancy of 8%. We'll finish the month with about 3,800 occupied rooms. Compared to last year, we ran 91.3% in the month of June: 43,554 rooms. So we're about 40,000 rooms off. Most importantly, 93% of my team — that's 577 employees —are currently laid off with no work and no immediate frame as to when they might be able to come back.”

— Robert Housez, General Manager, Chelsea Hotel

“Prior to the COVID-19 pandemic, the combined annual economic impact of these 12 agencies and attractions was slightly more than \$1.5 billion annually. The COVID-19 pandemic has deeply affected our revenues, attendance and staff. Our combined pre-COVID-19 annual revenues were close to half a billion dollars, and since mid-March, as I mentioned, all of us have gone to zero in terms of earned revenue. We project approximately \$98 million in loss for the first quarter of the year and more than \$200 million of loss over the entire fiscal year, assuming that all of us can reopen as the ROM is, and that will be permanently lost revenue.”

*— Josh Basseches, Director and CEO,
Royal Ontario Museum*

Where we are going

Resiliency and recovery

The people of Ontario are nothing if not resilient. Nowhere was this more evident than in how workers, businesses and community organizations mobilized to adapt, persevere and survive in the face of this unprecedented challenge.

In the **Tourism** sector, operators showed remarkable ingenuity in responding to a near 100% reduction in international visitors.

- **FlyGTA's** CEO started his business with one airplane offering scenic tours over Toronto with the aim to operate ultra-short haul flights around the GTA. Today, the company has 12 airplanes and has built a successful business providing both aerial tours and scheduled flights from Toronto to Niagara, Waterloo and Muskoka to inbound tourists and business travellers.

The impacts of border closings and limitations on global travel suddenly restricted FlyGTA's business, and the company accelerated its plans to expand offerings inside Ontario.

FlyGTA reached out to Kingston, a key travel destination, and worked with local community and tourism groups to build domestic tourism packages linking jurisdictions in Ontario. They developed a licensed, in-house travel agency and partnerships with key Kingston tourism attractions to provide customized tour packages, weekend getaways and "daycation" options through southern Ontario.

The Kingston example has been welcomed by the city and its tourism businesses. The company plans to use this as a template for existing destinations throughout southern Ontario and new opportunities in the north.

- **Temagami Marine**, a marina an hour north of North Bay, saw business revenues immediately drop by 86% when COVID hit due to international travel restrictions for typical clients from the U.S. and Europe. The owners thought the year was lost.

The operator immediately pivoted to the domestic market, first-time boaters, and their business took off – 15% over the previous year. They hired additional staff to

help provide groceries, supplies and fuel to neighbouring cottagers who would stay in their boats and approach the dock for the goods and services exchange. The increase in new business from the GTA also helped local grocery stores and restaurants. Fishing on the water is safe and relaxing and that's what helped this business thrive in a pandemic.

- In 2020, Rideau Canal boat tour operator, **Le Boat**, lost 100% of their U.S. and international visitor base, which typically makes up 80% of their customers. The federal decision to delay opening the Rideau Canal also caused an unanticipated loss of revenue.

The Ontario government announcement allowing social bubbles of up to 10 was a huge help to their business in driving domestic travel interest. In June 2020, they pivoted all marketing activities to domestic travellers with a focus on safe staycations to explore Ontario's rural communities. They were able to increase the number of departures from their Smiths Falls location by nearly 30% with all Canadian visitation.

- **The Summer Solstice Indigenous Festival** in Ottawa received \$42,225 in support through Celebrate Ontario 2020 to shift its programming entirely online. Funding support enabled event organizers to sell more products from local artisans and businesses online than ever before, increase ticket sales for cooking classes and see participation for events reach over 527,000 participants with an audience of 50,000 in previous years. The festival helps Canadians of all walks of life recognize the enormous contributions that Inuit, First Nations and Métis peoples have made to Canada.
- **Lights On Stratford** is presenting a new, innovative three-month luminous art and interactive light festival in response to COVID-19 restrictions. Funding support from the new Reconnect Festival and Event Program is helping organizers stage the free, accessible and safe event with light sculptures, displays and projections in Stratford's downtown core and along the banks of the Avon River.

In the **arts and cultural sectors**, business and community leaders quickly came together to support one another in a world where new social distancing requirements prevent the kinds of large congregate audiences and crowds upon which these sectors traditionally relied.

- **The Ontario Trillium Foundation** launched the \$83-million Resilient Communities Fund to support the non-profit sector with grants of up to \$150,000 to help eligible non-profit organizations rebuild and recover from the impacts of COVID-19 so they can effectively meet the needs of communities across Ontario.

- **Factory Theatre** in Toronto kicked off its 2020-21 season with a new commissioned work created specifically to be livestreamed. The rest of Factory's all-digital season features five more world premieres and one reimaged Canadian classic that “embrace and reimagine how theatre is performed in the COVID-19 era.”
- The **Section 21 Film and Television Health and Safety Advisory Committee** of the Ontario Ministry of Labour, Training and Skills Development worked quickly to develop a guidance document for productions to help identify and mitigate potential workplace risks related to COVID-19. Productions have significantly restructured their processes and procedures in order to operate safely.
- **MusicTogether** provided a collaborative platform for online performances by Ontario musicians whose access to performing income had halted, providing them with direct funding, opportunities to reach new audiences, and e-commerce tools for selling recordings and merchandise. Supported by the Ministry, the initiative was run by volunteers from the music, broadcasting and interactive media sectors, and passed on 100% of the \$300,000 raised to artists.
- The **Royal Ontario Museum**, the **Ontario Science Centre** and **Science North** have worked with the Ministry of Education to deliver online learning and virtual education resources for teachers. Further, Science North has distributed thousands of STEM (science, technology, engineering and math) kits to youth and students in rural and remote northern Ontario communities.
- The **McMichael Canadian Art Collection**, the **Art Gallery of Ontario** and **Royal Botanical Gardens** have increased their digital offerings to include educational programs, virtual classes, interactive videos, activities, virtual tours, and performances.
- **Ontario Heritage Trust** is using digital and social media platforms to amplify the reach of its heritage programming, including a predominantly digital Doors Open Ontario.
- **Public libraries** across the province have shifted their operations to focus on digital and remote services, implementing online library card registration, ordering more e-books and online resources, and offering virtual story times, book clubs, and phone check-in services. A number of Toronto Public Library branches have re-focused their operations to support local food banks, packing food hampers to help those in need.

In the **sport and recreation sector**, coaches, administrators and volunteers also worked to sustain their sport and help provide both entertainment, healthy living options and opportunities for families and children across Ontario to stay active.

- Ontario has flowed funding from the **Federal Emergency Support Fund** to provide temporary relief to 67 provincial sport partners.
- Ontario has redesigned its **After School Program** with special 2020-21 guidelines to allow flexibility for its 112 program partners to deliver programming in alternate ways, based on the changing needs in their communities due to COVID-19.
- Activators from the **Community Aboriginal Recreation Activator** program were redeployed to help their community members: the CARA Activator at Moose Cree First Nation was redeployed to help with hunting to feed community members; the Activator at Alderville First Nation helped set up an outreach program for community seniors to ensure they have food and supplies; the Activator at Batchewana First Nation of Ojibways prepared care packages for the community's children and Elders (over 200 Elders received care packages); the Activator at Oneida Nation of the Thames developed an activity booklet for delivery to each household that gave people ideas about physical activities they could do in their homes.

Stories of Resilience – Working to help sector partners innovate, thrive and contribute to our spectacular double bottom line

“COVID-19 continues to have a disproportionate impact on live entertainment and local culture, creating ongoing challenges for the artists that bring our communities to life. It is critical that we continue to innovate, finding and funding new ways of engaging and supporting Ontario's arts and culture sectors. At MusicTogether.ca, we welcome the Minister's announcement of new funding for festivals and events.”²⁴

*— Raj Khanna, CEO and Co-Founder, Dark Slope,
Founding Team Member of MusicTogether.ca*

“We are thrilled to invite our community back to The Parks for them to participate in this drive-in experience and are eager to help our neighbours enjoy creating new memories as we navigate these challenging times.”²⁵

*— Karen Sparks, Executive Director,
Wesley Clover Parks*

“Acclaim Health is grateful to MPP Crawford and the Ontario Trillium Foundation for supporting our virtual programming for people living with dementia. The pandemic has been extremely isolating and exhausting for families coping with dementia. The funding for laptops will allow us to engage and connect people living with dementia through targeted virtual programming – bringing a little bit of joy, relief and companionship over the winter months.”

— Acclaim Health, Oakville

“Over the years, Ontario Trillium Foundation has provided their ongoing support and partnership to allow Yee Hong Centre to fulfil our mission of enabling seniors to live their lives to the fullest. With the Resilient Communities Fund, Yee Hong will be able to continue our high quality of support to seniors and their family caregivers in the community during these challenging times.”

*— Yee Hong Centre for Geriatric Care,
Scarborough*

Even with these immense efforts, it remains clear that the survival and work towards recovery of thousands of businesses and jobs will require a deeper partnership between the sector and all levels of government.

From the earliest days of the pandemic, the Ontario Government acted quickly to support the individuals and businesses hit hardest by the crisis, including:

- Increasing the Employer Health Tax Exemption to \$1 million, meaning nearly 90% of Ontario businesses won't have to pay the tax this year.
- A five-month interest and penalty-free grace period for businesses to file select provincially administered taxes.
- \$1.9 billion in relief to employers by allowing them to defer WSIB payments for six months.
- Deferring property tax payments to school boards by 90 days and challenging municipalities to do likewise.
- Introducing a 10% refundable Regional Opportunities Investment Tax Credit which will encourage businesses to invest in every region of Ontario.

- A \$1.5-billion expanded energy subsidy designed to provide direct relief to every family and business in Ontario.
- Expanding eligibility in the Low-Income Energy Assistance Program and ensuring that electricity and natural gas services are not disconnected for nonpayment during the outbreak.
- Setting electricity prices at off-peak rates for residential, small business and farm customers, 24 hours a day for 45 days in order to support their increased daytime electricity usage.

The provincial government further co-operated with the federal government as it provided emergency supports for Canadians, including the:

- Canada Emergency Response Benefit (CERB)
- Canada Emergency Wage Subsidy (CEWS)
- Canada Emergency Business Account (CEBA)
- Improving the Business Credit Availability Program (BCAP)
- Emergency Support Fund for Cultural, Heritage and Sport Organizations

Recognizing the specific risks faced by workers, community organizations and businesses within the heritage, sport, tourism and culture industries in the province, the Ministry further pushed through a targeted series of relief measures aimed at helping those who were hit the hardest:

- Implementing a Domestic Recovery Marketing Support Program through Destination Ontario by working with \$7 million in provincial funding while leveraging \$6 million from Destination Canada to support locally led marketing programs encouraging Ontarians to stay local.
- For 2020-21, the Ontario Trillium Foundation launched an \$83-million Resilient Communities Fund to help rebuild and re-position the non-profit sector.
- The Ontario Arts Council launched a \$1.6-million Arts Response Initiative to help rebuild the arts sector.
- Ontario Creates, an agency of the Ministry, streamlined the cultural media tax credit application process and worked to reduce processing times for these tax credits.

- Retooling the \$7-million Ontario Music Investment Fund to process applications as quickly as possible.
- Providing \$150,000 in matching funds and working with the music industry to create musictogether.ca, an online site facilitating live concert streams by at least 300 Ontario-based artists, each of whom will receive a one-time performance fee of \$1,000.
- Continuing to flow funds through agencies and programs of the Ministry, including the Ontario Arts Council, the Ontario Cultural Attractions Fund, and the Ontario Trillium Foundation.
- Tripling the Tourism Economic Development and Recovery Fund from \$500,000 to \$1.5 million.
- Allowing licensed restaurants to sell and deliver unopened alcohol.
- Introducing legislation that provides liability protection to individuals, organizations and businesses who make an honest effort to follow public health guidance and laws relating to COVID-19 so they can continue providing the services Ontarians need.
- Negotiating nearly \$5 million in supplemental emergency support funding from the federal government, to more fairly support Ontario's sport and recreation sector.
- Launching Ontario.Live, a digital hub through which people can learn about and support local artists, tourism operators and attractions throughout the province.
- Launching the 2020-21 Public Library Operating, Pay Equity and First Nation Salary Supplement Grants early to support public libraries and services across the province.
- Investing \$9.75 million to more than 250 festivals and events through Celebrate Ontario 2020, including support for Blockbuster events.
- Investing \$9 million through the new Reconnect Festival and Event Program to support municipalities and event organizers during the COVID-19 pandemic. This funding will be used to maintain public safety requirements and allow people to reconnect with their communities through online, drive-through and other innovative experiences.

These initiatives were accompanied by a robust provincial consultation led by Minister Lisa MacLeod, who:

- Reviewed the SARS recovery model in January, including consultation with former tourism and culture ministers from the SARS crisis.
- Assembled informal tables with stakeholders in February to assess data coming in from international partners.
- Initiated telephone town halls with over 1,000 stakeholders and tourism leaders, and held virtual town halls with Regional Tourism Organizations.
- Appointed Norm Miller, Member of Provincial Parliament for Parry-Sound Muskoka and Parliamentary Assistant to Premier Ford (Intergovernmental Affairs), to undertake a consultation throughout the province.
- Created 14 Ministerial Advisory Councils (MACs) encompassing the entire suite of economic sectors overseen by the Ministry in order to provide guidance on emergency response and long-term recovery efforts.
- Expedited payments to recipients of the Community Museum Operating Grant (CMOG) program and Provincial Heritage Organization Operating Grant (PHO) to help manage cash flow pressures and streamlining applications to make applying for funds as simple and fast as possible.

Faced with the worst public health and economic crisis in living memory, workers, businesses, community leaders and governments at all levels have worked closely to limit the damage and safely help our hardest hit and most vulnerable people weather this storm.

Even so, there is an emerging recognition that short-term support measures are not enough. Too many businesses and too many jobs remain in limbo, requiring constant government support to succeed. Too many others have already failed.

With the Budget 2020 – *Ontario's Action Plan: Protect, Support, Recover*, Ontario set out the next phase of a comprehensive action plan to respond to the serious health and economic impacts of COVID-19, with a total of \$45 billion in support over three years to make available the necessary health resources to continue protecting people, deliver critical programs and tax measures to support individuals, families and job creators impacted by the virus, and lay the groundwork for a robust long-term economic recovery for the province.

- The government is providing one-time emergency funding of \$25 million for Ontario's arts institutions to help cover operating losses incurred as a result of COVID-19. This funding will help these organizations remain solvent and prepare for a time when they can fully re-open their facilities, resume full programming and welcome back their visitors and audiences.
- Ontario is exploring ways to provide Ontario residents with support of up to 20% for eligible Ontario tourism expenses to encourage them to discover Ontario in 2021, the year of the Ontario staycation, when public health experts advise it is safe to do so. The government is setting aside \$150 million for this initiative and will be consulting with stakeholders about the details.
- Ontario has committed \$100 million over two years for the Community Building Fund, administered by the Ontario Trillium Foundation, to support community tourism, cultural and sport organizations that are experiencing significant financial pressures due to the pandemic.
- To help companies maintain their tax credit eligibility and to help provide some stability in uncertain times, the 2020 Budget proposed to temporarily extend some timelines and amend some requirements for the cultural media tax credits.
- Ontario is connecting workers in the tourism and hospitality sector and others most affected by the pandemic to training and jobs with an investment of \$180.5 million over three years.

Other projects, programs and policies with other ministries that could support the Ministry's sectors include:

- \$1.8 billion in support for a people and jobs fund to respond to emerging needs.
- \$60 million for one-time costs for PPE for small business.
- \$1 billion in broadband expansion to support rural communities.
- \$600 million in relief to support eligible businesses required to close or significantly restrict services due to enhanced public health measures, doubling the government's initial commitment of \$300 million made in the 2020 Budget.
- \$60 million for a black youth action plan.
- \$57 million for a digital Main Street.
- \$10 million for Indigenous-owned business.
- \$6 million to electrify Ontario's campsites.

- \$5 million to support agriculture and horticulture societies.
- Support for Francophone businesses.
- Cancelling the wine tax increase and freezing beer tax rates.
- Establishing a market for iGaming.

A long-term plan for Ontario's heritage, sport, tourism and culture industries needs to build on *Ontario's Action Plan* and look past the crisis in front of us. It needs to take necessary steps today to help those who work in these industries rebuild as renewed, strong thriving sectors that will help restore consumer confidence and allow us to once again contribute to Ontario's double bottom line.

Reconnecting Ontarians

Re-emerging as a global leader

The Ontario we all want to see is an Ontario that combines a growing economy with a diverse, dynamic and vibrant culture that enriches our quality of life.

Like all other parts of our society, the sectors overseen by the Ministry of Heritage, Sport, Tourism and Culture Industries were already grappling with wide-ranging social and technological changes. These changes, which challenged traditional business models and assumptions upon which these sectors operated, were well underway before the onset of the COVID-19 pandemic and will likely continue long after we overcome this current moment of crisis.

The pandemic has led to a short-term shutdown of many businesses and lost jobs across these sectors while fundamentally changing customer behaviors and further accelerating sectoral changes that were already underway.

The Ontario government operates on the understanding that the best ideas for sustainable economic growth cannot and will not originate from inside of government but must be driven by the experiences, anxieties, frustrations and aspirations of the people and businesses who work in these sectors every day.

In March 2020, with this goal in mind, Minister Lisa MacLeod convened 14 Ministerial Advisory Councils (MACs) comprised of those who have the most at stake in seeing these sectors not only survive the current crisis but emerge in the best possible position for long-term growth and success.

Ministerial Advisory Councils – Recommendations and Actions Taken

The Ontario government values the expertise of members of Ministerial Advisory Councils whose contributions help ensure their industries are well-positioned to re-emerge faster and recover successfully from the effects of the outbreak, to stabilize Ontario's economy and prepare for the road ahead. Ontario is delivering on recommendations from each of the Ministerial Advisory Council reports:

Airlines and Airports Council

- *Advocating on behalf of the airlines and airports to shape policy and initiatives emerging from the Federal Government which largely regulates the industry.*
- *Developing a travel incentive program to encourage Ontarian's to engage in travel and tourism.*

Amateur Sport and Recreation Council

- *Establishing a Community Building Fund to work with organizations in supporting infrastructure upgrades as recommended to promote growth of sport and recreation in Ontario.*
- *Providing flexibility to funded organizations that deliver community-level programming (i.e. After School Program and Indigenous programs) to continue to serve their communities, contributing to essential services and activities that are helping Ontarians deal with the health, social and economic challenges of the COVID-19 pandemic.*
- *Committing to annual funding levels for sport and recreation sector organizations to ensure no loss of funding.*
- *Entering into a renewed bilateral agreement with the Federal Government that includes emergency COVID funding support to PSOs, including advocating for Ontario's fair share.*
- *Committing funding to system supports, including OHPSI and OASF as well as direct to athletes through the QFG program and for events through Sport Hosting.*

Arts and Culture “Toronto Big 8” Council

- *Providing clear timelines and guidelines for reopening.*

Festivals, Events and Local Community Attractions Council

- *Implementing measures to allow tourism businesses to expand alcohol licensed areas, retail sales channels and revenue-generating opportunities, such as allowing licensed boats to provide alcohol services while docked and permitting the addition of a physical extension to their boats for the duration of 2020.*
- *Coordinating tourism dollars to initiatives that promote collaboration within the industry between RTOs, DMOs, sector associations, and operators, such as a \$13 million funding partnership between Destination Ontario and Destination Canada to support locally-driven marketing initiatives to incentivize Ontarians to explore and promote local communities.*

Film and Television Council

- *Expediting processing of tax credit certification to reduce tax credit wait times.*
- *Working with Ministry of Labour, Training and Skills Development (MLSTD) to improve film and television training opportunities for workers.*

Hoteliers and Hospitality Council

- *Removing restrictions/barriers that impede industry, introducing innovative thinking to outdoor dining spaces serving food and alcoholic beverages.*
- *Proposing a cap on third-party delivery platforms.*

Interactive Digital Media Council

- *Expediting processing of OIDMTC certification to reduce tax credit wait times.*
- *Temporarily extending the 37-month claim period for eligible expenditures for the OIDMTC (included in Budget 2020).*

Ministry Attractions and Agencies Council

- *Implementing new, online digital service offerings and programs.*
- *Leveraging opportunities to deepen collaboration on key initiatives and projects.*
- *Providing targeted funding to help agencies and attractions navigate the pandemic and continue to keep visitors safe.*

Music Council

- *Advocating with the federal government for continued relief and support to the live music industry.*

Professional Sport Council

- *Convening a working group with team representatives from five of Ontario's professional sport leagues and teams to support the safe reopening of professional sport.*

Tourism Leaders Council

- *Providing support to businesses and operators to help mitigate the additional costs of health and safety items.*
- *Improving access to broadband in order to provide digital/virtual services.*

See Appendix 1 for a full list of Ministerial Advisory Council members

A path to action

From the earliest days of the pandemic, these councils met directly with the Minister and senior officials in the Ministry to share their ideas and perspectives for what a true recovery and re-emergence looks like. These perspectives along with the ideas heard throughout the Minister's extensive consultations, have informed a broad-based recovery strategy centered around multi-year planning that includes 15 proposals.

Action Item # 1

The Redevelopment of Ontario Place as a World-Class, Year-Round Destination

As Ontario Place marks its 50th anniversary, it will be central to the recovery of heritage, culture, recreation and tourism for all Ontarians post pandemic – both as a tourism destination but also as a display of our strong cultural identity in Ontario.

Through the ongoing Call for Development process, the government received submissions from around the world to help achieve this vision and bring the site back to life. The development of Ontario Place will encourage investment while ensuring that this unique site on Toronto's waterfront will once again become the crown jewel of the province.

The government is transforming Ontario Place into a world-class, year-round destination that will attract local, provincial and international visitors – and could include exciting sport and entertainment landmarks, public spaces and parks, recreational facilities and retail.

As we modernize the grounds, key heritage and recreational features will remain, such as the Cinesphere, the pods, Trillium Park and the William G. Davis Trail.

Action Item # 2

Building Back Stronger in our Communities

Ontario's heritage, sport, tourism and culture industries are in every community across the province and our museums, galleries, not-for-profits, and sport organizations all need help which is why our recovery will be focused on community building. The government will reinforce the work of the Ontario Trillium Foundation's annual \$103 million budget with an additional \$100 million investment over the

next two years to best support not for profits who deliver important results in our neighbourhoods.

The Community Building Fund will invest \$100 million over two years to support community tourism, cultural, sport and recreation organizations that are experiencing significant financial pressures due to the pandemic. The fund will be administered by the Ontario Trillium Foundation (OTF) with two streams:

- Supports for local community tourism, heritage and culture not-for-profits, such as community museums, local theatres, fairs and cultural institutions, to help sustain their operations in the short term and create new attractions, experiences and events
- Funding for municipalities, Indigenous communities, charitable and non-profit sport and recreation organizations to make investments in infrastructure rehabilitation and renovation in order to operate sport and recreation facilities and meet public health protocols and local community needs.

Action Item # 3

Recognizing the Contributions of Ontarians

Each year, the Ministry recognizes thousands of Ontarians who have selflessly contributed their time and expertise to the advancement of their fellow Ontarians. Given the current and likely future challenges with respect to social gatherings, we will be streamlining, modernizing and expanding how we recognize volunteer contributions across Ontario through our volunteer service awards.

The Ontario Volunteer Service Awards recognize individuals for continuous years of volunteer service at a single organization, such as hospitals, seniors centres and community associations. Volunteers contribute to a wide range of services in Ontario, including supporting seniors and adults through Meals on Wheels, building up communities through local Lions Clubs, and much more. The June Callwood Outstanding Achievement Award for Voluntarism, in memory of the late June Callwood, recognizes the outstanding volunteer contributions of individuals and groups who make Ontario communities a better place to live and work.

Action Item # 4

Broaden Ontario's Volunteer Base

Ontario's heritage, sport, tourism and culture sectors mobilize Canada's largest volunteer base. To best support Premier Doug Ford's vision for increased volunteerism in Ontario, the Ministry will work in a whole-of-government approach.

As announced in the 2020 Ontario Budget, the government intends to develop a new organization to oversee a Provincial Emergency Volunteer Unit. This organization will develop and oversee a pool of volunteers who pre-register to help during an emergency. It will be tasked with recruiting volunteers from diverse backgrounds, including age, geography and skillset. The organization will primarily focus on large-scale emergencies such as natural disasters or health crises but will be tasked with investigating how it can support the broader volunteer sector and sustain the culture of volunteerism demonstrated by the Ontario Spirit this year.

The government will consult with the volunteer sector this winter and outline a plan to launch this organization in the spring budget.

Action Item # 5

Promote Safety and Excellence in Sport

In sport, we will strengthen the relationship between the Ministry and our provincial sport partners. Our overall goal will be to help the sport sector recover post pandemic, to instill confidence in parents that it is safe to play, to inspire children and youth to be active and to best equip our high-performance athletes for competitions around the world. The mental and physical well being of our athletes will be top of mind and we will build on the successful Rowan's Law approach for concussions as part of achieving this goal.

In working with our amateur sport partners we identified a number of key opportunities and we will work together to achieve them.

Action Item # 6

Restore Confidence and Strengthen Inclusivity in Sport, Culture, Volunteerism and Tourism

We will leverage our relationships with our professional sport organizations and our key arts and cultural institutions to rebuild confidence in sport and culture after a prolonged pandemic. We will rely on our tourism operators and businesses to implement best practices and ensure training for staff to deliver safe and quality experiences.

Ontario will highlight unique, authentic tourism experiences across the province, including Francophone and Indigenous tourism. Key to restoring confidence with resuming these activities safely will be a commitment to equity and accessibility for all Ontarians.

Action Item # 7

Compete for Global Festivals, Events and Conferences

Ontario will be positioned to host prominent festivals, events and conferences, including international sport competitions such as the 2026 FIFA Men's World Cup while enhancing programming in our communities. We will rebuild our capacity for sport hosting to increase the number of opportunities and scale of events that Ontario attracts and, ultimately, establish the province as the destination of choice for marquee amateur sport events. This will require centralizing and increasing our funding streams for programs like Celebrate Ontario and Ontario Sport Hosting.

This strengthened and redesigned festival, event, and sport hosting program will respond to evolving industry requirements. Pre-COVID, every \$1 of Celebrate Ontario funding resulted in almost \$21 of visitor spending. Post-COVID, our festivals, celebrations, and sport hosting events will be key to our economic and social recovery, and therefore will receive strategic investment and thoughtful consideration.

Action Item # 8

Strengthen Ontario's Commitment to the Creative Industries

The Ministry will continue to work with its Film and TV Advisory Council to ensure we invest in Canadian content, increase our film-friendly locations, and support the development of crews and talent.

The Ministry will maintain the stability of the province's five cultural media tax credits.

- Ontario Book Publishing Tax Credit
- Ontario Film and Television Tax Credit
- Ontario Production Services Tax Credit
- Ontario Computer Animation and Special Effects Tax Credit
- Ontario Interactive Digital Media Tax Credit

Tax credits encourage production in the film, television, interactive digital media and book publishing industries. They play an important role in increasing economic activity and job creation in Ontario while also enhancing the province's cultural profile.

During COVID-19, Ontario is ensuring cultural media tax credits and other program supports remain stable while working to streamline the time it takes to process them.

Action Item # 9

Create Regional Equity in Film and Television Production

Eastern and southwestern Ontario are presently underrepresented in film production. The Ministry will work with the sector to develop a strategy to identify film-friendly locations, build incentives for production and develop talent.

Creating enhanced opportunities for regional production will support a greater diversity of stories and creative talent and help create film and television industry jobs and investment in these regions. It would also facilitate the creation of new Ontario-made content that can be exported for audiences to enjoy worldwide, further building up Ontario companies and accruing economic and cultural benefits for the province.

Action Item # 10

Skills Development / Redevelopment in Creative, Tourism and Hospitality Industries

The Ministry will continue to work with the ministries of Labour, Training and Skills Development and Colleges and Universities to support their investment in reskilling those whose tourism jobs have changed or shuttered while also creating training opportunities for growth potential in our creative industries.

The government's additional investment of \$180.5 million in employment services and training programs, including apprenticeships, micro-credentials, and second-career programs will benefit businesses and workers in the tourism, hospitality and cultural industries, including the film and television, interactive digital media, and music industries as they adapt to changes in their sectors, ensuring that the workforce has the skills needed for success.

Action Item # 11

Capitalize on Emerging Creative Industries Markets

In interactive digital media and video gaming, the Ministry will continue to pursue opportunities to work with the Ministry's other partners – particularly in tourism and culture industries – to re-emerge from the pandemic. The interactive digital media and video game sector can be engaged to help stakeholders and sectors served by the Ministry expand and enhance their capacity to provide state-of-the-art online experiences to audiences and customers. Examples include:

- Virtual reality tours of Ontario attractions and communities, featuring immersive experiences to provide "online tourists" with memorable experiences, linked to revenue opportunities such as merchandise and gift card sales.

- Helping Ontario's film, television, music and publishing companies create virtual marketplaces and VR-driven performances that profile their products to global buyers and fans.

The Ministry will also maximize opportunities from the development of an iGaming strategy in Ontario to support this emerging market.

Action Item # 12

Protect Ontario's Core Cultural Institutions

Through the Ontario Arts Council, the Ministry will deliver \$25 million in one-time emergency support to Ontario's core arts organizations to help them cover operating losses incurred as a result of COVID-19 and prepare for a time when they can fully re-open their facilities, resume full programming and welcome back visitors and audiences.

A further investment for the Ministry's attractions and agencies will be made to support Ontario's iconic institutions, such as the Royal Ontario Museum, Niagara and St. Lawrence Parks Commissions, Ontario Science Centre and Science North.

Action Item # 13

Reconnect Ontarians

A travel incentive will be offered in 2021 to encourage hyperlocal tourism that reconnects Ontarians with each other and to their communities when it is safe to do so.

Through Ontario's Action Plan: Protect, Support, Recover, Ontario is committing to provide Ontario residents with support of up to 20% for eligible Ontario tourism expenses to encourage them to safely discover Ontario in 2021, the year of the Ontario staycation. The government is setting aside \$150 million for this initiative and will be consulting with stakeholders about the details.

Providing a travel incentive will help encourage Ontarians to choose travel within Ontario and explore their own backyard. This will be an important part of supporting business sustainability and keeping Ontario competitive within the industry.

Action Item # 14

Develop a Year-Round, Globally Competitive Suite of Products

To kick start tourism in Ontario, Destination Ontario in partnership with the RTOs and other tourism organizations will develop a plan to attract tourists to the province through our gateway cities – Ottawa and Toronto – and to Ontario's unique rural and remote tourism offerings. They will also be tasked with helping operators build a competitive and ambitious 365-day, year-round suite of products to ensure tourism opportunities in every Ontario season.

To remain globally competitive, we will create tourism trails to profile Indigenous, LGBTQ+ and Francophone tourism, enhance craft and culinary experiences, develop film and television, music, playhouse, and festival and event experiences. The Ministry invites all partners in all sectors of the Ministry to participate in this exciting opportunity.

Action Item # 15

Open Ontario up for Business and Visitors

We will work with the Ministry's agencies, including the Metro Toronto Convention Centre and Ottawa's Shaw Centre, to bring business travel and conventions back to our national and provincial capitals in a post-COVID environment. We will continue to stabilize their operations with an eye to compete for global events and conventions when it is safe to do so.

We will modernize the Ontario Travel Information Centres (OTICs) to amplify our pride of people, pride of place and pride of local products. Destination Ontario operates 11 OTICs – nine year-round and two seasonal – across the province. The Ministry will identify options and opportunities to modernize visitor services offered through the OTICs, including evolving the traditional model to deliver information services in a new, modern and customer-focused way that promotes tourism and Ontario-made products.

A call to action

Share your ideas with us

Compared to where we were at the start of this pandemic, we know a lot more about COVID-19, how it spreads, and who is most at risk.

Ontario is ready to receive and deliver the COVID-19 vaccine in an ethical, timely and effective manner. Since there will be limited doses available at first, the province will be rolling out the vaccine in three phases, informed by medical experts and the COVID-19 Vaccine Distribution Task Force. This approach will ensure vaccines get to our most vulnerable first, followed by immunization across Ontario for all people who want to get the vaccine. Up-to-date information can be found on [Ontario.ca/covidvaccine](https://ontario.ca/covidvaccine). Having a vaccine is hopeful news, but don't forget to wear a mask and keep your distance so that you and your families can stay safe and healthy. No matter how long the pandemic lasts, the decisions we make today will shape the way our economy and our society look when we return to the new normal. The steps we take now will help safeguard our double bottom line, protecting businesses and jobs while also ensuring Ontario remains one of the most dynamic and diverse places to live in the entire world.

So, the question for all of us remains: what does your Ontario look like?

As Minister of Ontario's Heritage, Sport, Tourism and Culture Industries, here's my answer:

My Ontario has film and TV production, the ballet and all the other performing arts.

It has recording studios and live music, the Toronto Symphony and the Canadian Opera Company.

My Ontario has OHL hockey and figure skating, skiing and canoeing.

My Ontario has libraries, museums and art galleries.

My Ontario has festivals and fairs, culinary tours and bike routes.

In five years, my Ontario will still embrace the sectors my Ministry supports, and the people of Ontario will still stand behind those who work in these sectors and the businesses that depend on them.

My Ontario will champion all the qualities that make our communities not only livable, but worth celebrating ... the things that make Ontario a magnet for immigrants from around the globe.

Now is the right time for everyone – from both inside and outside of government – who agrees this is an Ontario worth saving to come together on an end-to-end plan to help these sectors survive this pandemic and emerge stronger and with more confidence.

I invite you to share with us what you want your Ontario to look like. Tell us how you wish to see yourself, your business, and your community reflected in these proposals. I am seeking your input on the proposals to re-emerge as a global leader.

Together, we can continue to ensure Ontario remains the world in one province, a place whose quality of life rivals any other jurisdiction in the world.

I know all stakeholders in the vital sectors my Ministry oversees are united in a common goal – to recover, rebuild and re-emerge in a post-pandemic environment.

My Ministry will engage in long-term planning, defining short-, medium- and long-term renewal strategies as we work to help these industries compete on a global scale once again.

We will build this plan out over the next 18 months, three years and five years, measuring the success of all initiatives contained in this White Paper against the framework outlined in Budget 2020 – Ontario's Action Plan: Protect, Support, Recover.

I expect these initiatives to conform to clear standards of performance and justify continued investment by demonstrating observable progress against clearly defined objectives:

1. Meeting the double bottom line: each program we offer will be expected to foster a cultural output and meet financial accountability objectives.
2. Being attainable for all Ontarians, regardless of income or where they live.
3. Aiming for equity, particularly for vulnerable populations.
4. Aligning with a whole-of-government approach: ensuring correspondence with funding streams and initiatives within the Ministry and the government as a whole and aiming at growth and better integration in all sectors.

We have big challenges in front of us, but I hope this White Paper and the initiatives it puts forward will help start a conversation about arriving at some equally big solutions. I invite you to be part of that conversation.

Together we can build the kind of Ontario we all want to see.



The Honourable Lisa MacLeod
Minister of Heritage, Sport, Tourism and Culture Industries

Appendix 1

Ontario's Ministerial Advisory Councils

Arts and Culture “Toronto Big 8” Council

Chair

- Cameron Bailey, Artistic Director and Co-Head, Toronto International Film Festival

Members

- Alexander Neef, General Director, Canadian Opera Company
- Barry Hughson, Executive Director, National Ballet of Canada
- Carolyn Vesely, Chief Executive Officer, Ontario Arts Council
- Emma Stenning, Executive Director, Soulpepper Theatre
- Joana Vicente, Executive Director and Co-Head, Toronto International Film Festival
- Josh Basseches, Director and CEO, Royal Ontario Museum
- Marah Braye, CEO, Harbourfront Centre
- Matthew Loden, CEO, Toronto Symphony Orchestra
- Roberta Smith, Vice-President and Chief of Staff, Toronto Symphony Orchestra
- Stephan Jost, Director and CEO, Art Gallery of Ontario
- Weyni Mengesha, Artistic Director, Soulpepper Theatre

Airlines and Airports Council

Co-Chairs

- Jeffrey Brown, Executive VP and COO, Porter Airlines
- Lorrie McKee, Director, Public Affairs and Stakeholder Relations, Greater Toronto Airports Authority

Members

- Andrew Gibbons, President and Chief Executive Officer, WestJet
- Beth Potter, President and CEO, Tourism Industry Association of Ontario
- Deborah Flint, President and CEO, Greater Toronto Airports Authority
- Gene Cabral, Executive Vice-President, Billy Bishop Airport
- George Petsikas, Senior Director, Government and Industry Affairs, Air Transat
- Julian Low, President, Porter Airlines
- Krista Kealey, Vice-President, Communications and Public Affairs, Ottawa International Airport Authority
- Mark Williams, Senior Director, Government and Industry Affairs, Sunwing

Ex Officio

- Kaleed Rasheed, Member of Provincial Parliament, Legislative Assembly of Ontario
- Steven Crawford, Member of Provincial Parliament, Legislative Assembly of Ontario

Amateur Sport and Recreation Council

Co-Chairs

- Cyril Leeder, Sport and Tourism Professional
- Debbie Low, Chief Executive Officer, Canadian Sports Institute of Ontario

Members

- Archie Allison, Director, Access and Awareness, Variety Village
- David Shoemaker, Chief Executive Officer, Canadian Olympic Committee
- Fran Rider, President, Ontario Women's Hockey Association
- Glenn MacDonell, President and CEO, Special Olympics Ontario
- Jeremy Cross, Executive Director, Coaches Association of Ontario
- Marc Laliberte, President, Indigenous Sport and Wellness Ontario
- Philip McKee, Executive Director, Ontario Hockey Federation
- Ted Baker, Vice-President, Ontario Hockey League

Ex Officio

- Andrea Khanjin, Member of Provincial Parliament, Legislative Assembly of Ontario
- David Smith, Member of Provincial Parliament, Legislative Assembly of Ontario

Book and Magazine Publishing Council

Chair

- Michael Levine, Chairman, Westwood Creative Artists, Generic Productions Inc.

Members

- Alana Wilcox, Senior Editor, Coach House Books
- Dan Wells, Publisher, Biblioasis
- Holly Kent, Executive Director, Ontario Book Publishers Organization
- John Yates, CEO, University of Toronto Press
- Karen Brochu, Vice-President of Sales and Marketing, House of Anansi Press/
Groundwood Books
- Melanie Rutledge, Executive Director, Magazines Canada
- Scott Jamieson, COO, Annex Business Media

Festival, Events, and Local Community Attractions Council

Co-Chairs

- Marie Lalonde, Executive Director, Ontario Museums Association
- Troy Young, Chief Executive Officer, Attractions Ontario

Members

- Beth Potter, President and CEO, Tourism Industry Association of Ontario
- Carole Anne Piccinin, Executive Director, Ottawa Festivals
- Dave MacNeil, Chief Executive Officer, Festivals and Events Ontario
- Kevin Eshkawkogan, President and Chief Executive Officer, Indigenous Tourism Ontario
- Marlaine Koehler, Executive Director, Great Lakes Waterfront Trail
- Patrick Connor, Executive Director, Ontario Trails Council
- Rebecca MacKenzie, President and Chief Executive Officer, Culinary Tourism Alliance
- Richard Linley, President and Chief Executive Officer, Wine Council of Ontario
- Rick Layzell, President and Chief Executive Officer, Boating Ontario
- Scott Simmons, President, Ontario Craft Brewers
- Shelagh Paterson, Executive Director, Ontario Library Association

Ex Officio

- Belinda Karahalios, Member of Provincial Parliament, Legislative Assembly of Ontario
- Toby Barrett, Member of Provincial Parliament, Legislative Assembly of Ontario

Film and Television Council

Co-Chairs

- Christina Jennings, Chairman and CEO, Shaftsbury
- Jim Mirkopolous, Vice-President, Cinespace Film Studios

Members

- Brian O'Leary, Tax Counsel, NBC Universal
- Bruce Harvey, Ottawa Film Commissioner, Ottawa Film Office
- Carol Ann Pilon, Directrice générale, Alliance des Producteurs Francophones du Canada
- Corrie Coe, Senior Vice President, Original Programming, Bell Media
- Cynthia Lynch, Managing Director and Counsel, Film Ontario
- David Carter, Executive Vice President, Entertainment Partners
- Jayson Mosek, Business Agent, NABET 700-M UNIFOR
- John Weber, President and CEO, Take 5 Productions

- Marcia Douglas, Director, Business Affairs and Digital Initiatives, Canadian Media Producers Association
- Monty Montgomerie, Business Agent, IATSE 873
- Neishaw Ali, Co-President, Computer Animation Studios of Ontario (CASO)
- Peter Apostolopoulos, President, TriBro Studios
- Rama Rau, Filmmaker / Producer, Trinetra Productions
- Slawko Klymkiw, CEO, Canadian Film Centre
- Sue Milling, Executive Director, ACTRA Ontario
- Wendy Noss, Executive Director, Motion Picture Association – Canada (MPA-C)

Ex Officio

- Christine Hogarth, Member of Provincial Parliament, Legislative Assembly of Ontario
- Donna Skelly, Member of Provincial Parliament, Legislative Assembly of Ontario

Hoteliers and Hospitality Council

Co-Chairs

- Colin Morrison, Managing Partner, Ottawa Embassy Hotels and Suites
- Terry Mundell, President and CEO, Greater Toronto Hotel Association

Members

- Andreas Antoniou, Restaurateur, Assembly Chef's Hall, El Caballito, Los Colibris, Estia VOLOS, Little Anthonys
- Andy Loges, Area General Manager Canada East, Hilton Toronto
- Beth Potter, President and CEO, Tourism Industry Association of Ontario
- Douglas Birrell, CEO, Niagara Falls Canada Hotel Association
- Edwin Frizzell, Regional Vice-President, Accor Hotels Central Canada and General Manager Fairmont Royal York
- Hani Roustom, Managing Director, The Hazelton Hotel
- Robert Housez, General Manager (Chair of Tourism Toronto), Chelsea Hotel Toronto
- Stephen Bectka, Restaurateur, Beckta, Play Food and Wine, Gezellig Dining
- Tim Reardon, General Manager (Marriott Hotel), Sheraton Centre Toronto
- Tony A. Elenis, President and CEO, Ontario Restaurant Hotel and Motel Association

Ex Officio

- David Piccini, Member of Provincial Parliament, Legislative Assembly of Ontario
- Deepak Anand, Member of Provincial Parliament, Legislative Assembly of Ontario

Interactive Digital Media Council

Co-Chairs

- Francis Baillet, Vice-President of Corporate Affairs, Ubisoft
- Lucie Lalumière, President and CEO, Interactive Ontario
- Mary Sorrenti, Vice-President, Game Pill

Members

- Don Fernando, Tax Professional, Ganz Studios Inc.
- Graham Smith, Co-Founder and Producer, Drinkbox Studios
- Jean-Sylvain Sormany, Studio Head, Snowed In Studios
- Jeff Evans, Owner and CEO, Tiny Titan Studio
- Joel Burgess, Studio Director, Copybara Games
- Jonathan Stanton-Humphries, CEO, Hit Grab
- Mike Schmalz, President, Digital Extremes
- Vanessa Chia, Producer, Art Director, Game Designer, Cococucumber
- Vikas Gupta, CEO, Avara Media

Ministry Attractions and Agencies Council

Co-Chairs

- Josh Basseches, Director and CEO, Royal Ontario Museum
- Lorenz Hassenstein, President and CEO, Metro Toronto Convention Centre

Members

- Beth Hanna, CEO, Ontario Heritage Trust
- David Adames, CEO, Niagara Parks Commission
- Guy Labine, CEO, Science North
- Hollee Kew, General Manager and CEO, St. Lawrence Parks Commission
- Ian Dejardin, Executive Director, McMichael Canadian Art Collection
- Mark Runciman, CEO, Royal Botanical Gardens
- Nancy Rowland, GM, OPC, Ontario Place
- Nina Kressler, President and CEO, Ottawa Convention Centre (Shaw Centre)
- Paul Kortenaar, CEO, Ontario Science Centre
- Stephan Jost, Director and CEO, Art Gallery of Ontario

Music Council

Co-Chairs

- Allan Reid, President and CEO, JUNO Awards
- Erin Benjamin, President and CEO, Canadian Live Music Association

Members

- Erik Hoffman, President, Live Nation Canada
- Patrick Rogers, Interim Co-CEO, Music Canada
- Margaret McGuffin, Executive Director, Music Publishers Canada
- Stuart Johnston, President, CIMA: Canadian Independent Music Association
- Helen Britton, Six Shooter Records/Music Managers Forum
- Miranda Mulholland, artist
- Shoshona Kish, artist

Ex Officio

- Rick Nicholls, Member of Provincial Parliament, Legislative Assembly of Ontario

Ontario Live Council

Chair

- Barry Avrich, Partner, BT/A Advertising

Members

- Clark Rabbior, Shopify
- Corrie Coe, Senior Vice-President, Original Programming, Bell Media
- David Tarrant, Vice-President, National Strategic Communications, Enterprise Canada
- Jeffrey Remedios, President, Universal
- Jennifer Dettman, CBC
- Katie Boothby, Shopify
- Marc Gertner, Vice-President, Business and Legal Affairs, Live Nation
- Raja Khanna, Music Together

Professional Sport Council

Co-Chairs

- Cyril Leeder, Sport and Tourism Professional
- Randy Ambrosie, Commissioner, CFL

Members

- Anthony LeBlanc, President of Business Operations, Ottawa Senators
- Bryan Blew, Senior Vice-President, Facilities and Business Operations, Toronto Blue Jays
- David Branch, Commissioner, OHL
- David Clanachan, Chairman and Commissioner, Canadian Premier League
- Eric Perez, Co-Founder, Ottawa Aces and Toronto Wolfpack
- Mark Goudie, President and Chief Executive Officer, OSEG

- Michael Bartlett, Vice-President, Community Affairs, MLSE
- Mike Morreale, Commissioner, Canadian Elite Basketball League
- Scott Mitchell, Chief Executive Officer, Ticats

Ex Officio

- Michael Harris, Member of Provincial Parliament, Legislative Assembly of Ontario

Tourism Leaders (RTOs) Council

Co-Chairs

- Anthony Annunziata, President, Tourism Partnership of Niagara
- Scott Beck, President and CEO, Tourism Toronto

Members

- Andrea Gardi, Executive Director, Regional Tourism Organization 4 Inc.
- Beth Potter, President and CEO, Tourism Industry Association of Ontario
- Bill Sullivan, Chief Executive Officer, Bruce Grey Simcoe
- Bonnie Ruddock, Executive Director, South Eastern Ontario
- Brenda Wood, Executive Director, Kawarthas Northumberland
- Chuck Thibeault, Executive Director, Central Counties Tourism
- David MacLachlan, Executive Director, Tourism Northern Ontario
- James Murphy, Executive Director, Explorers' Edge
- Jim Hudson, Executive Director, Southwest Ontario Tourism Corporation
- Maria Fortunato, Executive Director, Hamilton Halton Brant Regional Tourism Association
- Michael Crockatt, President and CEO, Ottawa Tourism
- Nicole Whiting, Executive Director, Ontario's Highlands Tourism Organization

Ex Officio

- Bob Bailey, Member of Provincial Parliament, Legislative Assembly of Ontario

Appendix 2

Minister MacLeod's Speeches

Legislative Assembly of Ontario, The Honourable Lisa MacLeod, Minister of Heritage, Sport, Tourism and Culture Industries, Presents to the Standing Committee on Estimates, November 18, 2020: <https://www.ola.org/en/legislative-business/committees/estimates/parliament-42/transcripts>

The Empire Club of Canada, The Honourable Lisa MacLeod, Minister of Heritage, Sport, Tourism and Culture Industries, Presents a Long-Term Strategy for Sectoral Resilience and Renewal, Oct. 30, 2020: <https://www.empireclubofcanada.com/pastspeakersarchive/4c0993bf-c68d-487e-92be-68b956a24da3>

Legislative Assembly of Ontario, The Honourable Lisa MacLeod, Minister of Heritage, Sport, Tourism and Culture Industries, Presents to the Standing Committee on Finance and Economic Affairs:

- June 25, 2020: <https://www.ola.org/en/legislative-business/committees/finance-economic-affairs/parliament-42/transcripts/committee-transcript-2020-jun-25>
- June 4, 2020: <https://www.ola.org/en/legislative-business/committees/finance-economic-affairs/parliament-42/transcripts/committee-transcript-2020-jun-04-vol-a>
- Video - https://www.youtube.com/watch?v=KWA2xSn_bsw

Economic Club of Canada, The Honourable Lisa MacLeod, Minister of Heritage, Sport, Tourism and Culture Industries, Presents The World in One Province, October 31, 2019: https://www.facebook.com/watch/live/?v=409142153109629&oref=watch_permalink

Notes

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3. CBRE Hotels' Trends in the Hotel Industry National Market/Operations Report with reproduction and use of information subject to CBRE Limited Disclaimer/Terms of Use as detailed at: <https://www.cbre.ca/en/real-estate-services/business-lines/valuation-and-advisory-services/hotels-valuation-and-advisory-services/disclaimer>
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6. Statistics Canada Table 21-10-0019-01 (Monthly Survey of Food Services and Drinking Places).
7. Source: "Early COVID-19 Impacts on OAC-Funded Arts Organizations", Survey Findings April 2020, Ontario Arts Council
8. Source: Report from the Arts and Culture (Toronto "Big 8") Ministerial Advisory Council, June 2020
9. Source: Minister's COVID-19 Interactive Digital Media Advisory Council, June 2020. Note: Figures are based on data collected in April 2020.
10. Source: Report of the Minister's COVID-19 Film and Television Advisory Council, June 2020.
11. Music Canada, Music Artist Impact Survey, April 2020.
12. Canadian Independent Music Association, Music Industry Impact Survey, March 17, 2020.
13. Book and Magazine Ministerial Advisory Council, Panel Report.
14. Book and Magazine Ministerial Advisory Council, Panel Report.
15. Ontario Museum Association, 2nd COVID-19 Impact Survey, October 2020.
16. Modeling based on Ministry's internal analysis of CMOG 2019 program intake's 2018 financial reports.
17. Data from the Government of Canada Survey of Heritage Institutions: 2019 Report.
18. Canadian Parks and Recreation Association. Recovery Response for Community Recreation, Parks and Sport Facility Closures and Program Interruption Caused by COVID-19. 2020/
19. Ministerial Advisory Council on Professional Sport. Report to the Minister of Heritage, Sport, Tourism and Culture Industries. June 2020.
20. Ministerial Advisory Council on Amateur Sport and Recreation. Survey of Amateur Sport and Recreation Organizations. May 2020.
21. Standing Committee on Finance and Economic Affairs, Second Interim Report: Economic Impact of COVID-19 on Tourism, p. 5, https://www.ola.org/sites/default/files/node-files/committee/report/pdf/2020/2020-08/42_1_FE_SecondInterim_02072020
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23. <https://www.ipsos.com/en-ca/As-COVID-19-Cases-Grow-Three-Quarters-Support-Shutting-Down-Most-Businesses>
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