I  Market Readiness

II  Key Initiatives + Platforms

III  Connected + Engaged

Marketing
Sales+Service
Community Engagement
Market Readiness

Key Initiatives + Platforms

Connected + Engaged

Marketing
Sales+Service
Community Engagement
This document provides a summary of market signals and leading indicators assessing the readiness of key source markets for Toronto’s visitor economy. This assessment—and the underlying data that powers it—enables informed decisions on the timing and approach to reactivate sales and marketing in key markets.

**3 READINESS LEVELS**

**HOLD AND MONITOR:**
Closed, unavailable, low demand

**PLAN AND PREPARE:**
Clear shift, increased demand for reengagement

**ACTIVE SALES AND MARKETING:**
Meaningful demand, imminently open and fully open

**HYPER-LOCAL (Toronto + GTA)**
Level of comfort with key hospitality activities continues to increase as capacity limits and mask mandates removed

- Virus control
- Destination readiness
- Access readiness
- Partner readiness
- Customer readiness

- Restaurants, attractions and most meetings permitted to operate at full capacity.
- General masking requirements is lifted; however, masking is required in certain indoor settings.
- 75% comfortable dining in a restaurant (+8% from previous); 71% comfortable shopping at malls (+4%)

**INTER-PROVINCIAL (Rest of Canada)**
Domestic search interest for travel to Toronto surpasses 2019 level

- Virus control
- Destination readiness
- Access readiness
- Partner readiness
- Customer readiness

- No travel restrictions or isolation periods required for domestic travelers entering Ontario.
- Domestic air capacity has recovery to 70% of 2019 levels.
- Search interest for travel to Toronto surpasses 2019 level by 14%

**REGIONAL DRIVE (2-hour drive)**
Feelings of safety largely steady towards near regional travel and key activities

- Virus control
- Destination readiness
- Access readiness
- Partner readiness
- Customer readiness

- Level of welcome toward regional travelers steady at 73%
- 86% comfortable with travel communities near them (+6%)
- 72% comfortable dining in a restaurant (-5%); 80% comfortable shopping at malls (-5%)

**UNITED STATES**
Removal of further travel barriers, improved openness to international travel set conditions for return of travel demand

- Virus control
- Destination readiness
- Access readiness
- Partner readiness
- Customer readiness

- Pre-entry tests no longer required for fully vaccinated travellers entering Canada.
- Avoidance of international travel at its lowest point of the pandemic (54.7%)
- Level of comfort flying on an airplane at 53% (+7%)

**INTERNATIONAL**
International search interest for travel to Toronto close to 2019 level, supported by removing pre-entry tests.

- Virus control
- Destination readiness
- Access readiness
- Partner readiness
- Customer readiness

- Pre-entry tests no longer required for fully vaccinated travellers entering Canada.
- Air capacity is 59% of 2019 levels following adjustments due to the impact of Omicron.
- International search interest for travel to Toronto is 92% of 2019 level (+13%)
Canadians more comfortable with travel activities

- Eating at a restaurant
- Shopping at the mall
Canadians searching for Toronto more than in 2019
Americans avoiding international travel . . .

. . . But less than before
Americans searching for Toronto again
Interest by trip type

City  Town  Beach  Countryside

Feb 2021  Jul 2021  Nov 2021  Feb 2022
Hotel Occupancy Trend

- **January**: 200,000
- **February**: 200,000
- **March**: 200,000
- **April**: 200,000
- **May**: 200,000
- **June**: 200,000
- **July**: 200,000
- **August**: 200,000
- **September**: 200,000
- **October**: 200,000
- **November**: 200,000
- **December**: 200,000

**Note**: The data is compared across years 2019, 2021, and 2022.
Future meetings - Confirmed room nights

- 2022
- 2023
- 2024
- 2025
- 2026
- 2027
- 2028
<table>
<thead>
<tr>
<th>DATE</th>
<th>ACCOUNT NAME</th>
<th>PROJECTED ATTENDANCE</th>
<th>ECONOMIC IMPACT</th>
</tr>
</thead>
<tbody>
<tr>
<td>Feb 24 - 28</td>
<td>Shoppers Drug Mart</td>
<td>2,400</td>
<td>$4,129,242</td>
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<tr>
<td>Apr 4 – 10</td>
<td>Ontario Public Service Employees Union</td>
<td>2,500</td>
<td>$5,362,500</td>
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<tr>
<td>May 3 – 7</td>
<td>Ontario Dental Association</td>
<td>12,000</td>
<td>$25,740,000</td>
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<tr>
<td>May 9 – 14</td>
<td>Ontario Association of Architects</td>
<td>1,500</td>
<td>$3,217,500</td>
</tr>
<tr>
<td>May 31 - June 5</td>
<td>Overactive Media Group</td>
<td>2,500</td>
<td>$5,688,663</td>
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<tr>
<td>June 13-15</td>
<td>Prospectors &amp; Developers Association of Canada</td>
<td>10,000</td>
<td>$65,572,992</td>
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<tr>
<td>Jun 20 – 24</td>
<td>Connected Intelligence Limited</td>
<td>25,000</td>
<td>$81,510,000</td>
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<tr>
<td>Aug 6 – 12</td>
<td>Unifor</td>
<td>3,000</td>
<td>$6,435,000</td>
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<tr>
<td>Aug 14 – 26</td>
<td>Yamaha Watercraft</td>
<td>1,700</td>
<td>$3,646,500</td>
</tr>
<tr>
<td>Sep 9 – 16</td>
<td>PCI Security Standards Council, LLC</td>
<td>1,800</td>
<td>$3,861,000</td>
</tr>
<tr>
<td>Sep 17 – 23</td>
<td>International Association for the Study of Pain</td>
<td>6,500</td>
<td>$13,942,500</td>
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<td>Sept 22 - 25</td>
<td>Home Hardware Stores Limited</td>
<td>8,000</td>
<td>$22,638,762</td>
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<tr>
<td>Sep 30 - Oct 2</td>
<td>Assn of Condominium Managers of Ontario</td>
<td>1,500</td>
<td>$3,217,500</td>
</tr>
<tr>
<td>Oct 15 – 23</td>
<td>Amer. Academy Of Child &amp; Adolescent Psychiatry</td>
<td>4,000</td>
<td>$8,580,000</td>
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<tr>
<td>Nov 8 - 12</td>
<td>College of Family Physicians of Canada</td>
<td>3000</td>
<td>$8,773,428</td>
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<td></td>
<td><strong>TOTAL</strong></td>
<td></td>
<td><strong>$295,589,656</strong></td>
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</table>
Forecast: Conference Board of Canada CTRI
Forecast: Conference Board of Canada CTRI
100 = pre-pandemic levels of travel performance

Source: Skift Travel Health Index. Data as of February 2022.
Market Readiness

Key Initiatives + Platforms

Staying Connected

Marketing
Sales+Service
Community Engagement
Marketing platforms

ALWAYS ON

Campaigms & Catalysts
ALWAYS ON

DestinationToronto.com
NowPlayingToronto / T.E.D.
Social channels
Search
eNewsletters
Media Relations
In-market campaigns
Amplify big stories
Business Events Networks
Content Themes: Consumer Segment

- Local Scenes & Epic Events
- Globally Inspired Food & Nightlife
- Canada - at our doorstep
Content Themes: Business Events Segment

Vibrant Hub
Progressive Culture
Team Toronto
Canada - at our doorstep
Always On Content Strategy

- Annual editorial calendar
- Collaborations with local creators and publishers
- Prioritize video content
- Data and leads through eNews program
- Expand Business Events thought leadership content
Always On Content

ACTION: Share your stories

Use these hashtags:
#SeeTorontoNow
#MeetinToronto

Share your stories:
content@destinationtoronto.com
Destination Toronto

Welcome to the Destination Toronto Media Hub! Use this site to search for and download photos and videos from Canada’s largest city.

HOW TO USE THE MEDIA HUB:
SEARCH: Type keywords into the search bar, and Crowdriff’s image recognition and intelligent search capabilities will find the perfect visuals in seconds.

ALBUMS: Assets are sorted into albums based on the content. To search for a specific image or video, simply type the keyword into the search bar, or browse the assets in each album.

DESTINATION TORONTO PARTNERS: If you wish to contribute high-resolution, rights-free photo and/or video content to be featured on our Media Hub platform, please submit your content HERE.
T.E.D. & Now Playing Toronto

TORONTO EVENTS DATABASE (T.E.D.)
- Comprehensive database of events
- Free to list, one stop
- Network of data feeds

NOW PLAYING TORONTO
- Aimed at locals
- Encourage discovery of things to do across the entire destination
T.E.D. & Now Playing Toronto

**ACTION:**

*List your events*
Pass TO Savings

- Drive deeper exploration
- Downloadable pass
- Consumers, meeting delegates
- Formerly “MyTorontoPass”
Pass TO Savings

**ACTION:**
Participate with offer - watch for callout
Media Relations

ACTION:
Share your stories
Respond to media opportunities

ALWAYS ON
Maximize DestinationToronto.com

- Target visitors searching for destination information
- Opportunity to elevate your message
- Run-of-site opportunity
Business Events Platform
Domestic Drive Market Campaign

- Reinvigorate *Never Have I Ever* platform
- Highly interactive and engaging
- Late Spring - early Summer

Ontario, Quebec
Never Have I Ever, TO

ACTION: Connect your content
U.S Drive Market Campaign

- Partner with Destination Ontario’s digital campaign
- Leverage *Never Have I Ever* platform
- Late Spring/early Summer

New York State, Michigan
U.S. Fly Market Campaign

- Markets with strong flight capacity, priority for Business Events
- Drive destination awareness + conversion
- Early June - mid-summer

NYC / San Francisco & San Jose / Chicago, Washington, DC
2022 Sales Results (March 31)

DEFINITENET Room Nights

LEAD Room Nights

PROSPECTING Activities

SALES & SERVICE
Rebuild Pipeline

- Align deployment to key market segments
- Lead generation and business development
- Focus on citywide business
- U.S. + international + Canada
6ix Stack

- Support meeting planners to drive attendance
- Suite of digital tools
- Key differentiator for Toronto
Re-engage Travel Trade

- Collaboration with Destination Ontario + Destination Canada
- Joint marketing programs
- Group and FIT business, student+youth
Sales + Service

ACTION:
Sign up to join sales initiatives
COMMUNITY ENGAGEMENT
May
*Digital Readiness:*
Why video marketing is more important than ever

June
*Audience Development:*
Going Beyond the Land Acknowledgment

July
*Audience Development:*
Exploring Accessibility in the Tourism Landscape

August
*Digital Readiness:*
Maximizing search through SEO and SEM

Sept
*Audience Development:*
Travel Trade for Tomorrow

October
*Digital Readiness:*
Digital Checklist for Small Businesses

November
*Sustainability:*
Creating a tourism sustainability action plan
Annual General Meeting
Thursday, June 9

Business Outlook Forum
November
The Terminal

Industry hub for:
- Insights
- Data
- Events
- Resources
Market Performance Dashboard

Access this publicly-available Market Performance Dashboard to tap into insights about Toronto’s visitor economy including a breakdown of visitors and visitor spending; hotel occupancy and room demand; and the impact of meetings, conferences and events in the city.
I

Market Readiness

II

Key Initiatives + Platforms

III

Connected + Engaged

Marketing
Sales+Service
Community Engagement
- List your events on the Toronto Events Database
- **Submit content** for consideration aligned to content themes
- Upload **digital assets**
- Advertise on DestinationToronto.com
- Participate in the **Pass TO Savings** program
- Engage with Campaigns (**Never Have I Ever**)
- Leverage Content Platforms Hashtags **#SeeTorontoNow**, **#MeetinToronto**

**ACTION:**

LEVERAGE MARKETING PLATFORMS
Use Destination Toronto’s Digital Assets
 Bookmark *The Terminal*
 Use Business Intelligence data and analytics
 Participate in Education Events
- Respond to service requests and leads
- Participate in press trips for priority markets when asked
- Update your listings on DestinationToronto.com
- Subscribe to the Terminal2 newsletter
- Share your news
- Update your contact information
- Engage in Membership - coming soon

ACTION:
STAY CONNECTED
I  II  III

Market Readiness  Key Initiatives + Platforms  Connected + Engaged

Marketing Sales+Service Community Engagement