

DESTINATION
TORONTO

SPRING BRIEFING

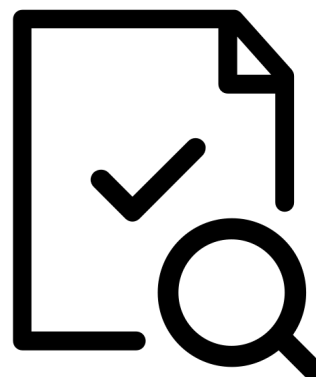


I



Market Readiness

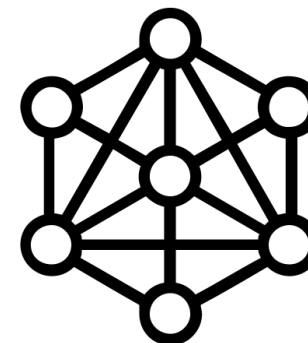
II



**Key Initiatives +
Platforms**

**Marketing
Sales+Service
Community Engagement**

III



**Connected +
Engaged**

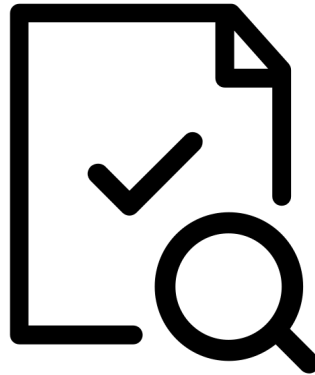


I



Market Readiness

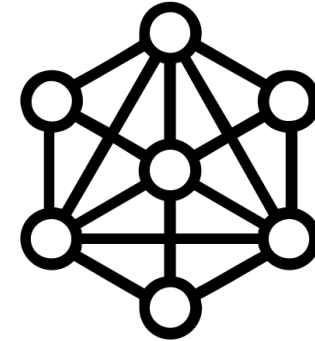
II



**Key Initiatives +
Platforms**

**Marketing
Sales+Service
Community Engagement**

III



**Connected +
Engaged**

MARKET READINESS INDEX APRIL 2022

(*DATA AS OF MARCH 25, 2022)

DESTINATION
TORONTO

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.

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%)

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

INTRA-PROVINCIAL (Rest of Ontario)

Confidence in key travel activities remain stable; welcomeness toward travelers down slightly



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

- Level of welcomeness toward domestic travelers now at 70% (-3%)
- 83% are comfortable in travel within home region (+3%)
- 74% comfortable dining in a restaurant (-2%); 79% comfortable shopping at malls (+4%)

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

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 travellers entering Ontario
- Domestic air capacity has recovery to 70% of 2019 levels
- Search interest for travel to Toronto surpasses 2019 level by 14%

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

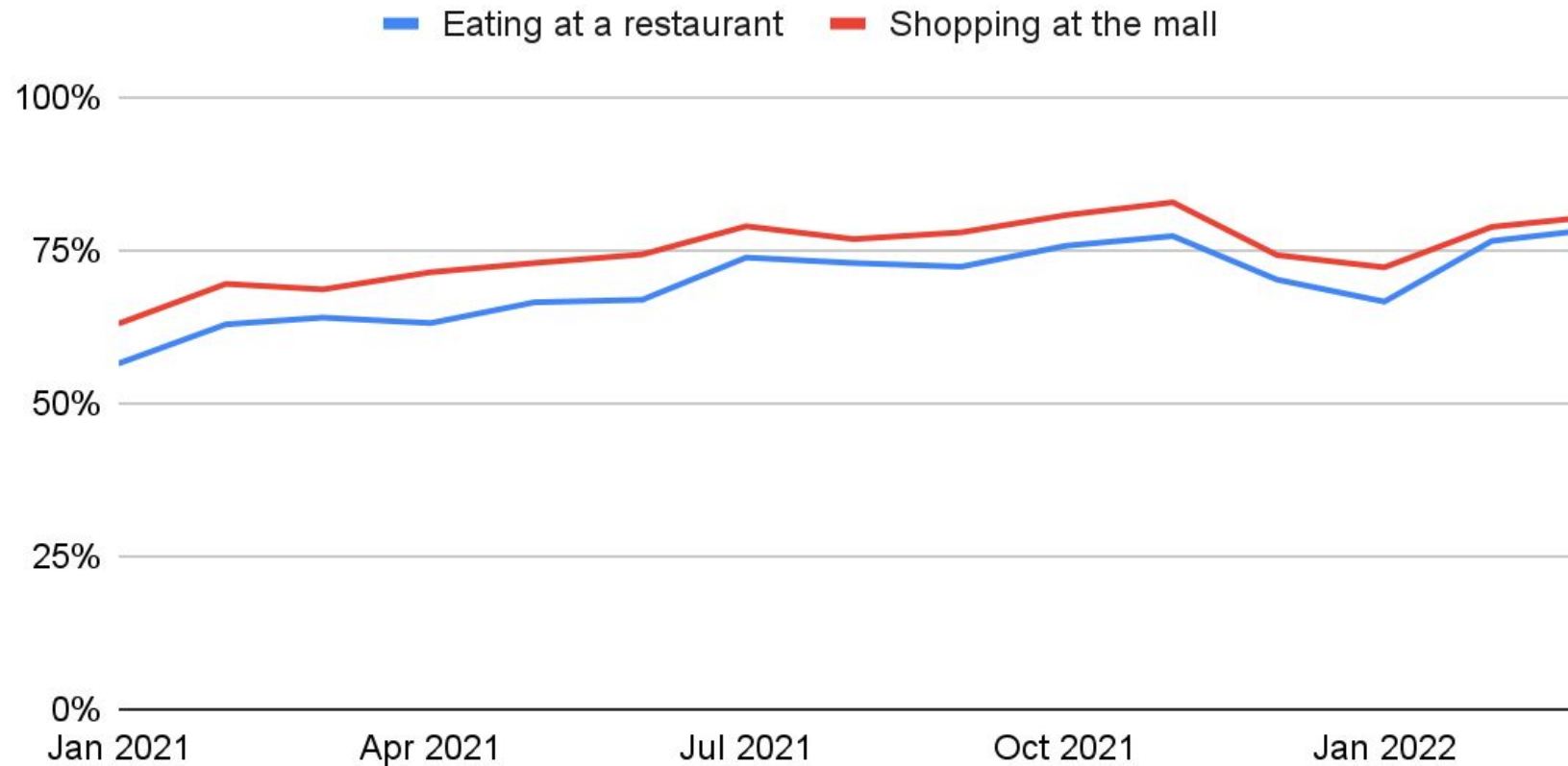
International search interest for travel to Toronto close to 2019 level, supported by removing pre-entry tests.



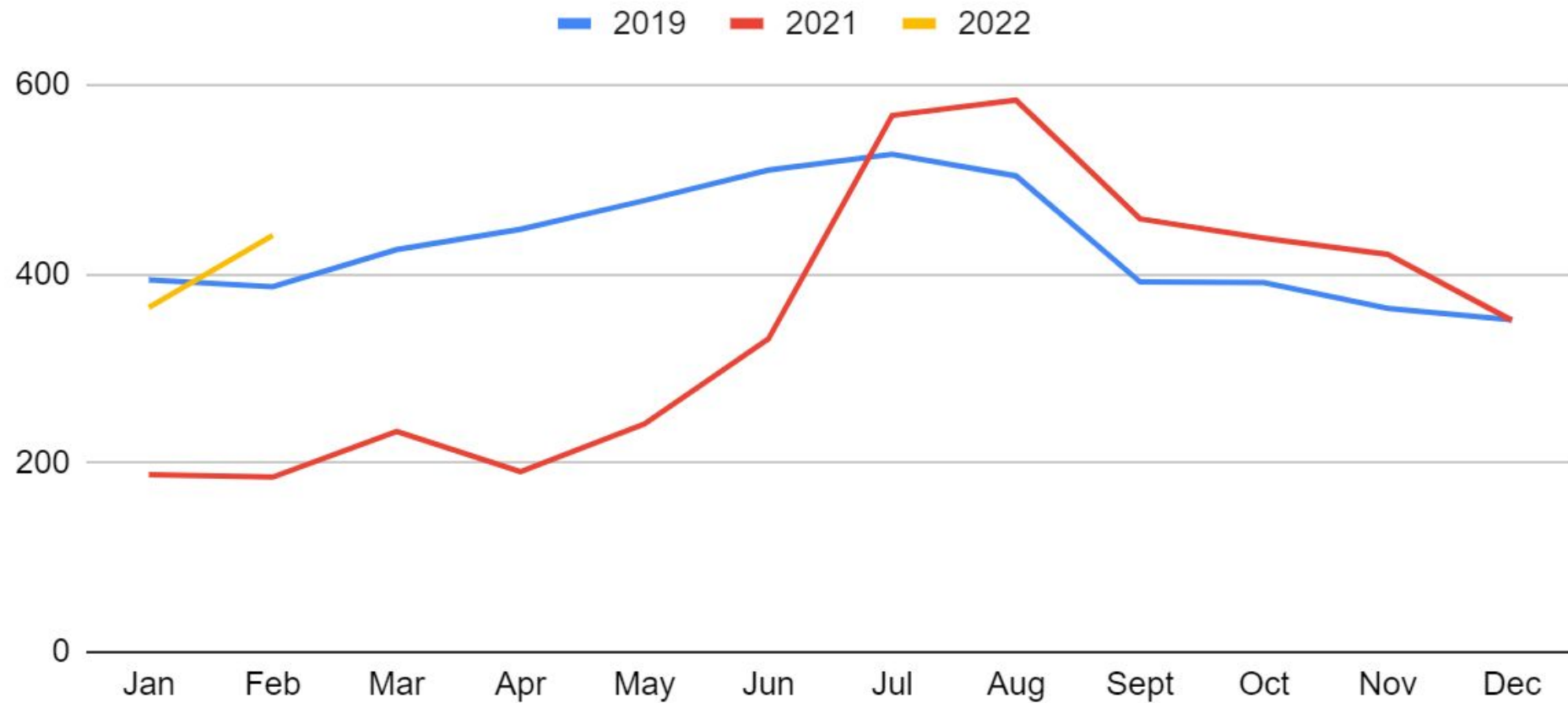
- Virus control
- Destination readiness
- Access readiness
- Partner readiness
- Customer readiness

- 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 (+14%)

Canadians more comfortable with travel activities

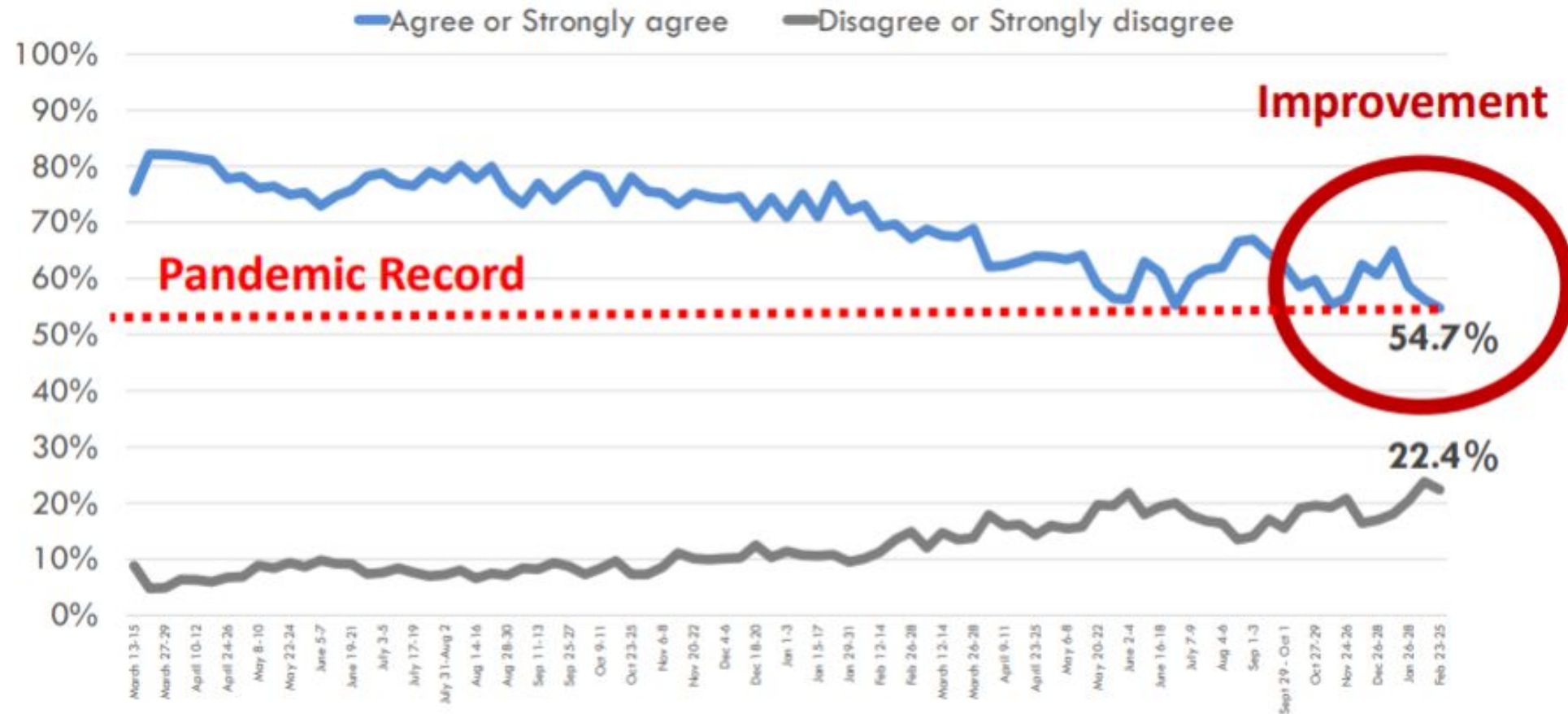


Canadians searching for Toronto more than in 2019

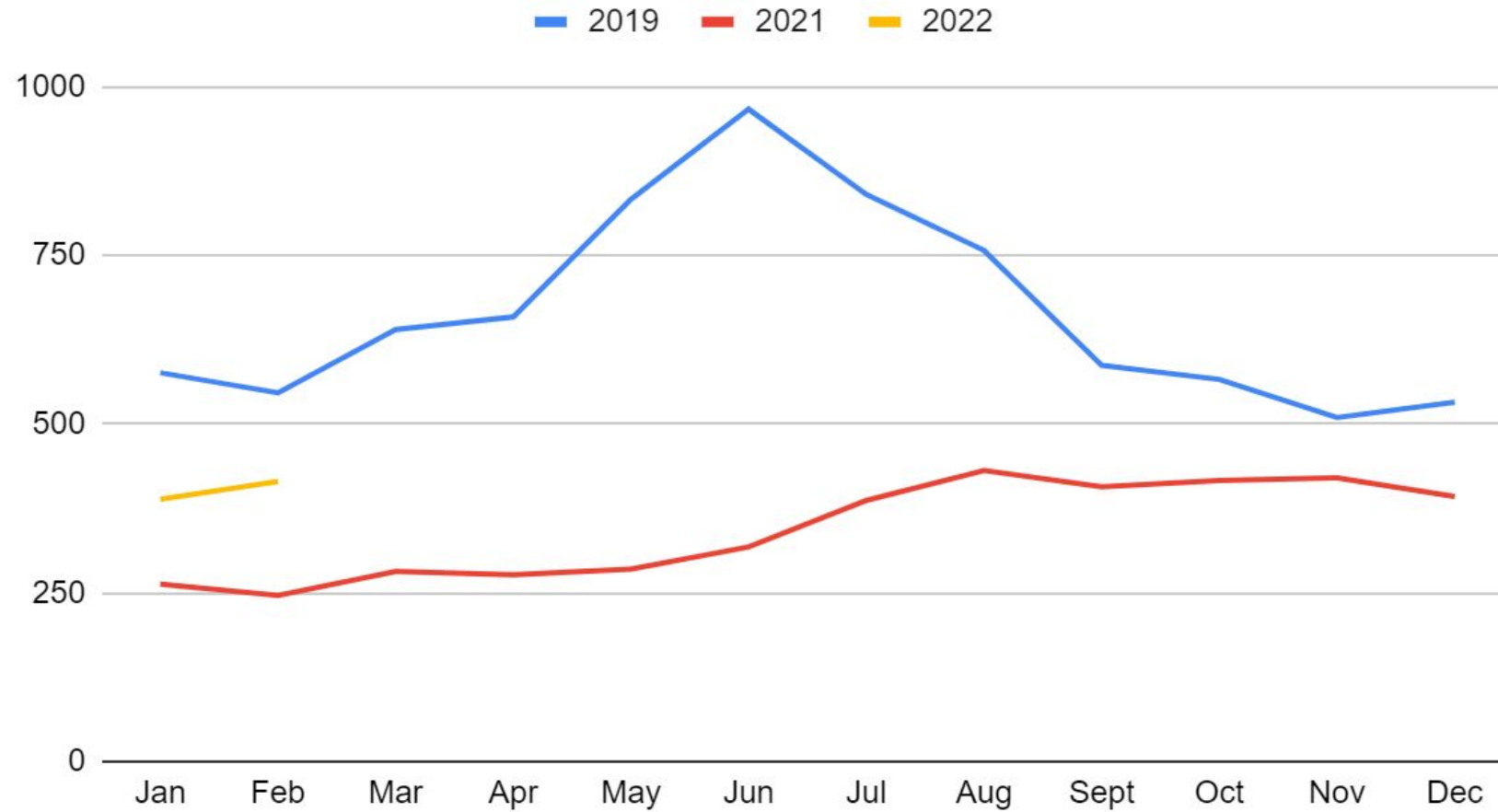


Americans avoiding international travel . . .

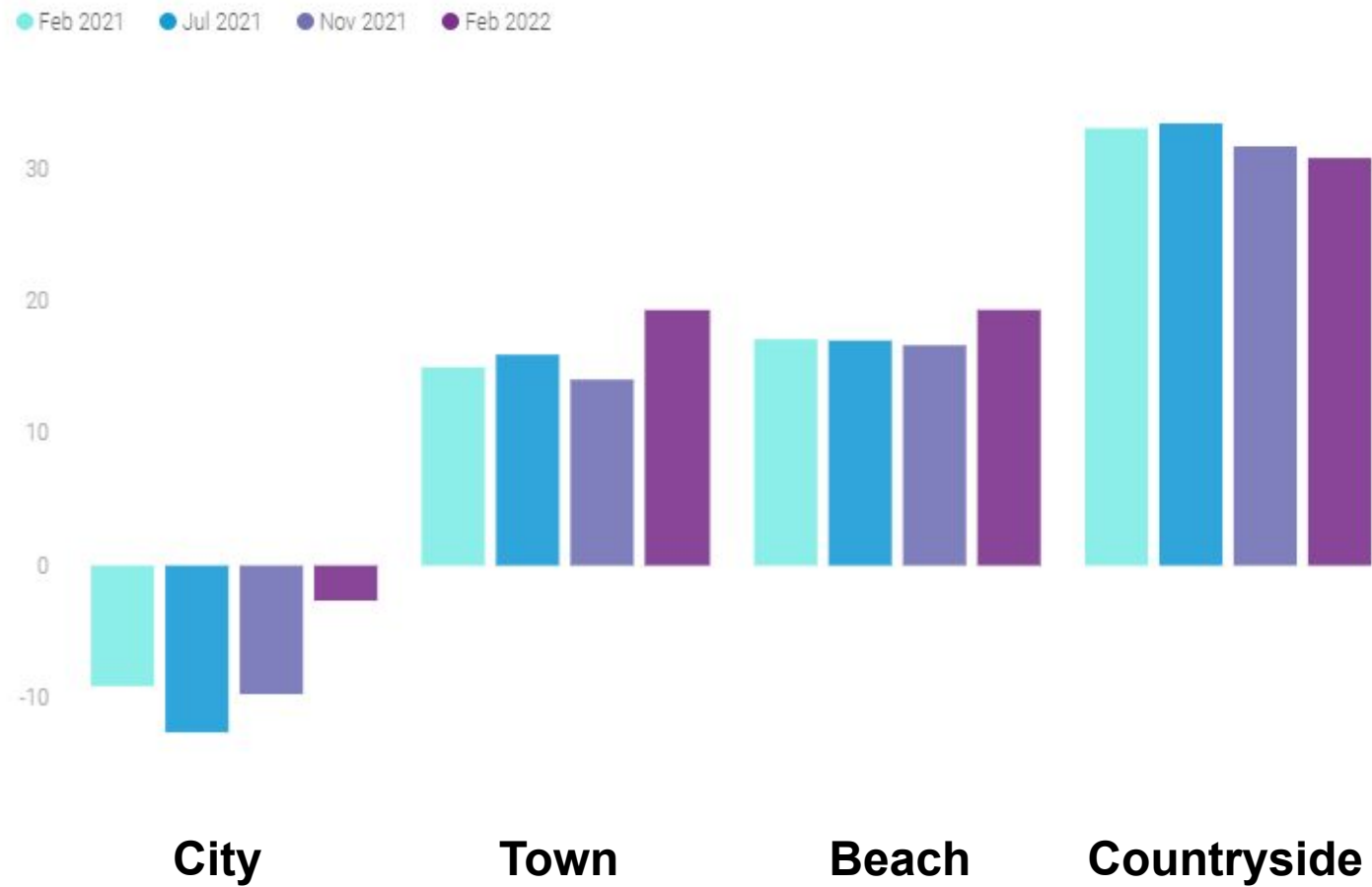
. . . But less than before



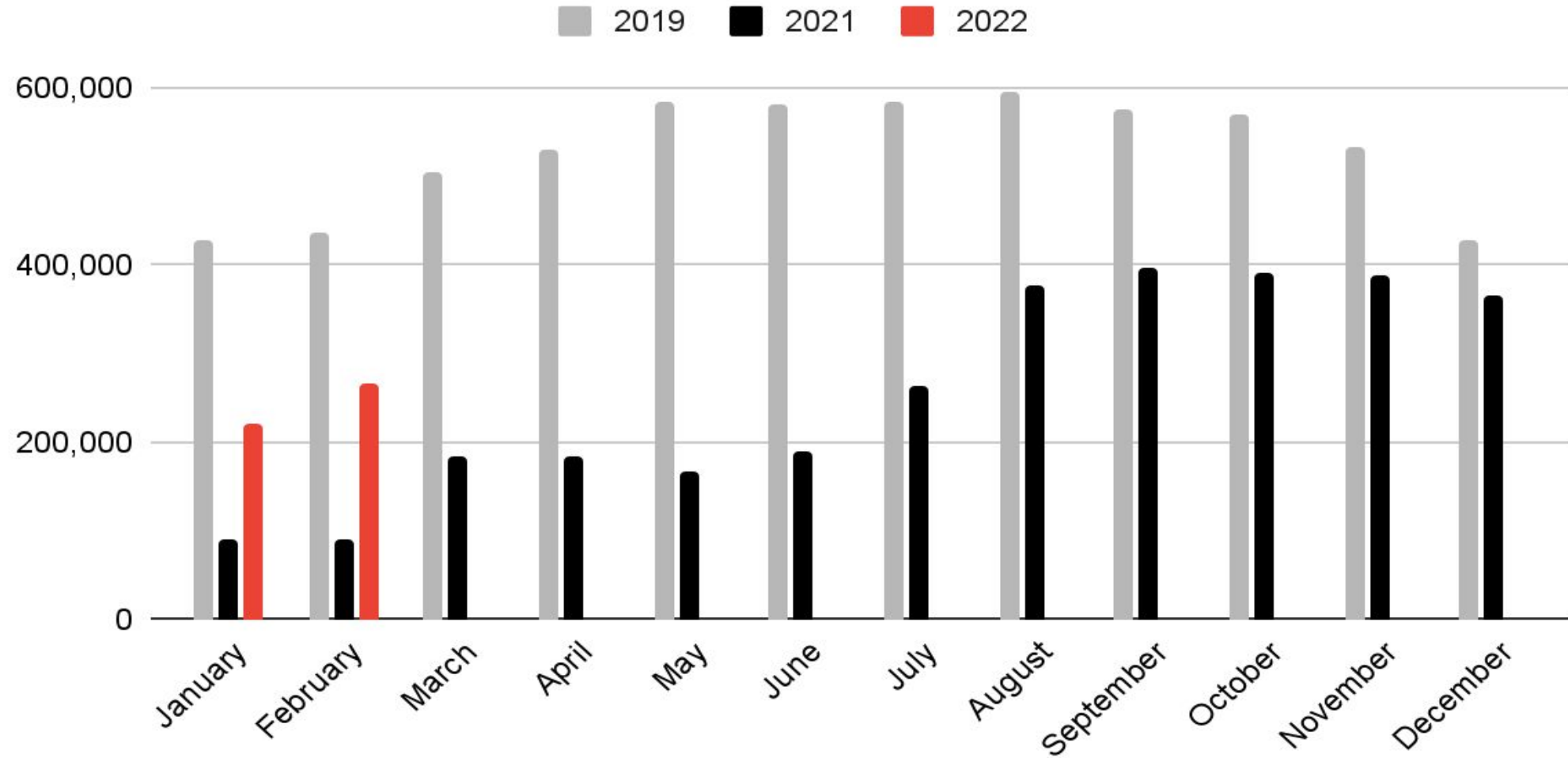
Americans searching for Toronto again



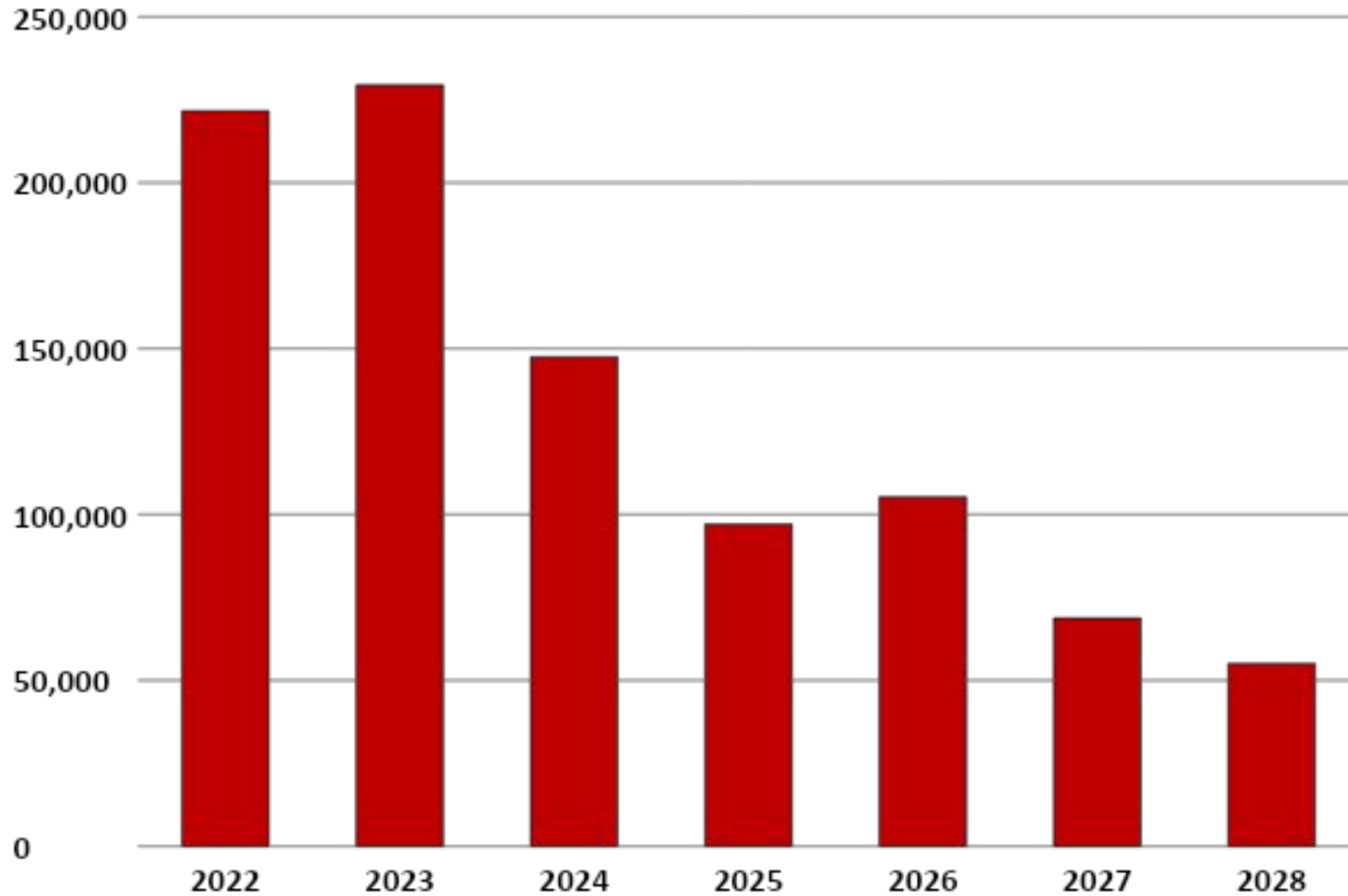
Interest by trip type



Hotel Occupancy Trend



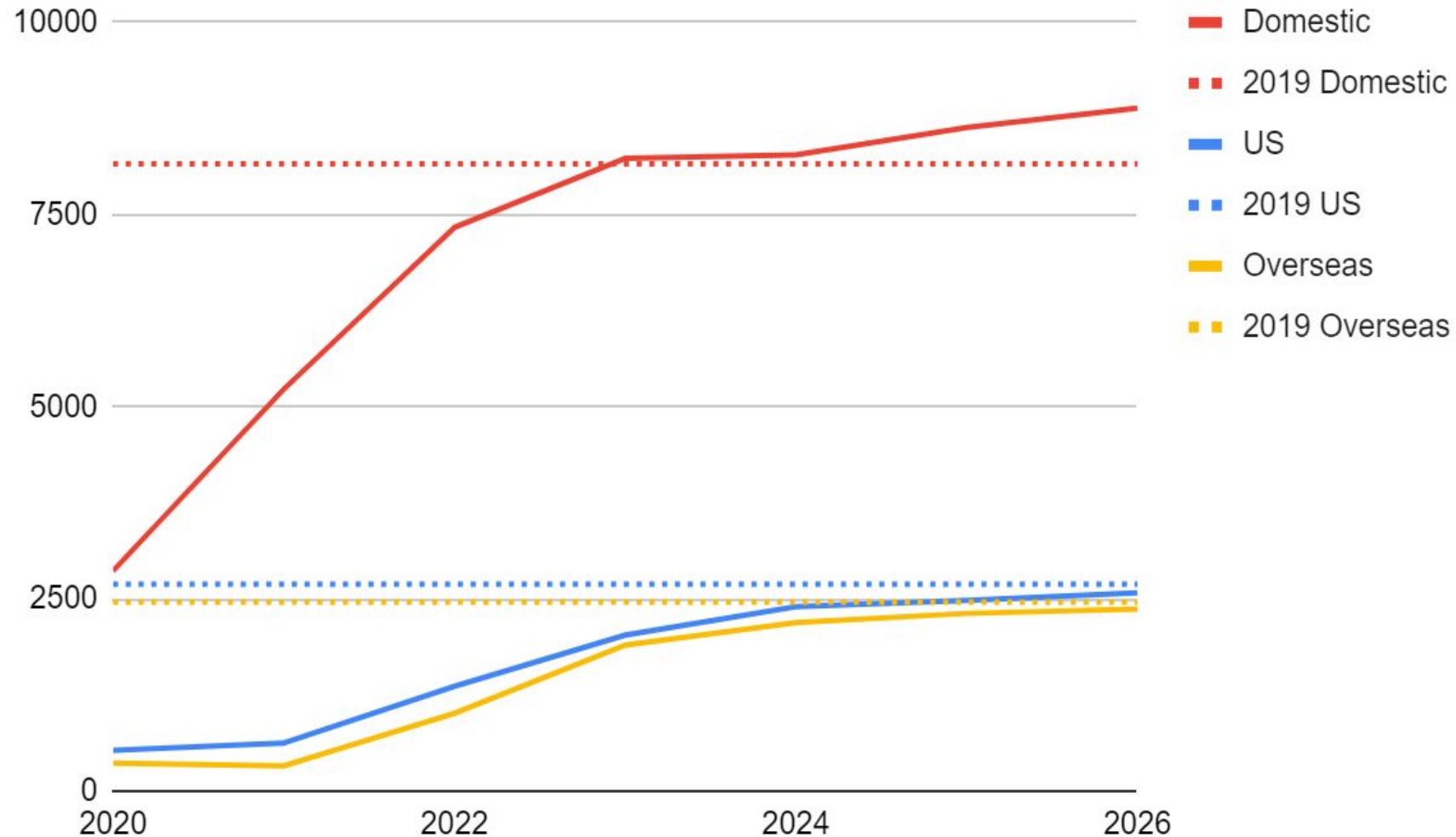
Future meetings - Confirmed room nights



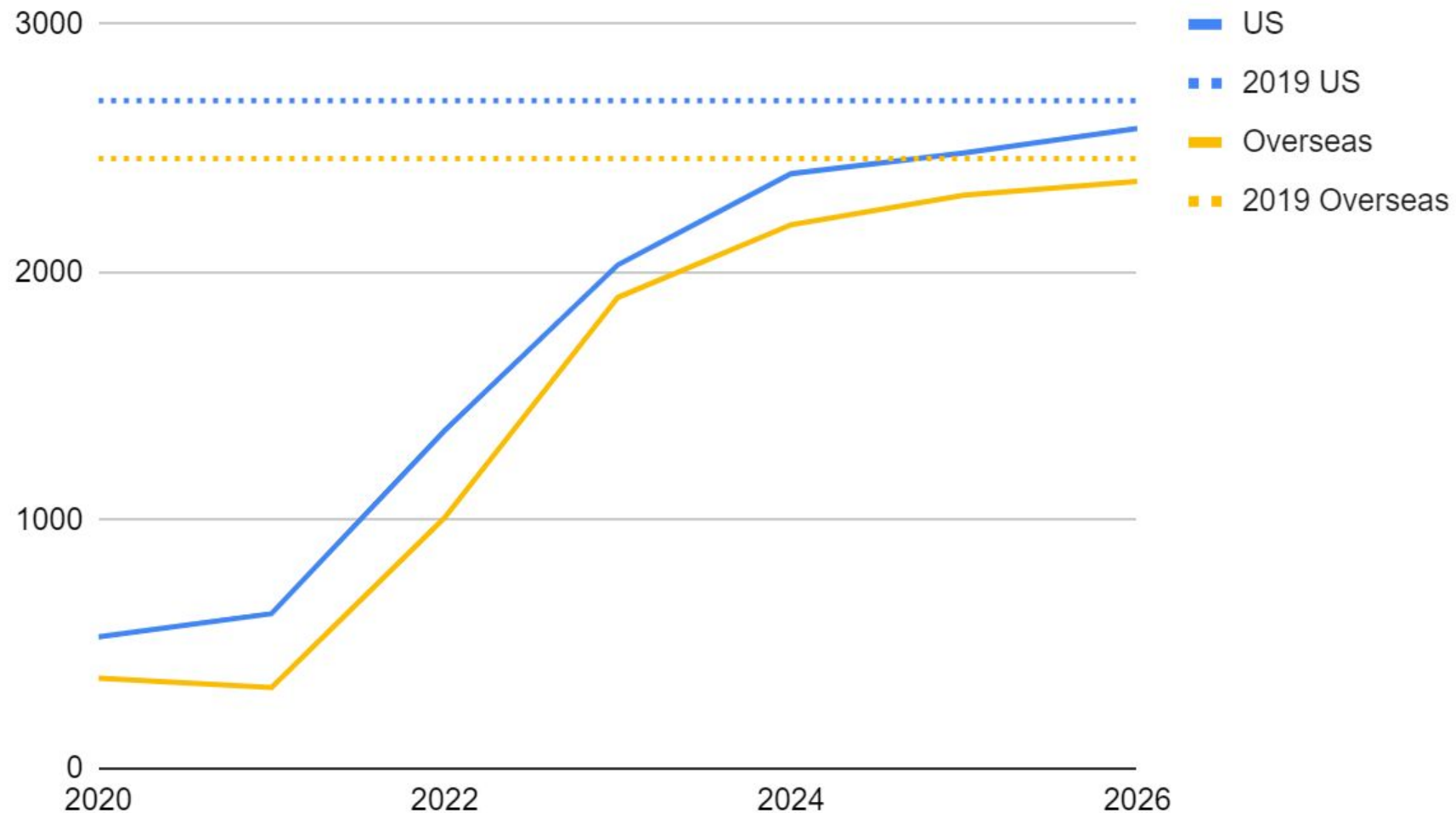
2022 Citywide Events in Toronto

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

Forecast: Conference Board of Canada CTRI



Forecast: Conference Board of Canada CTRI



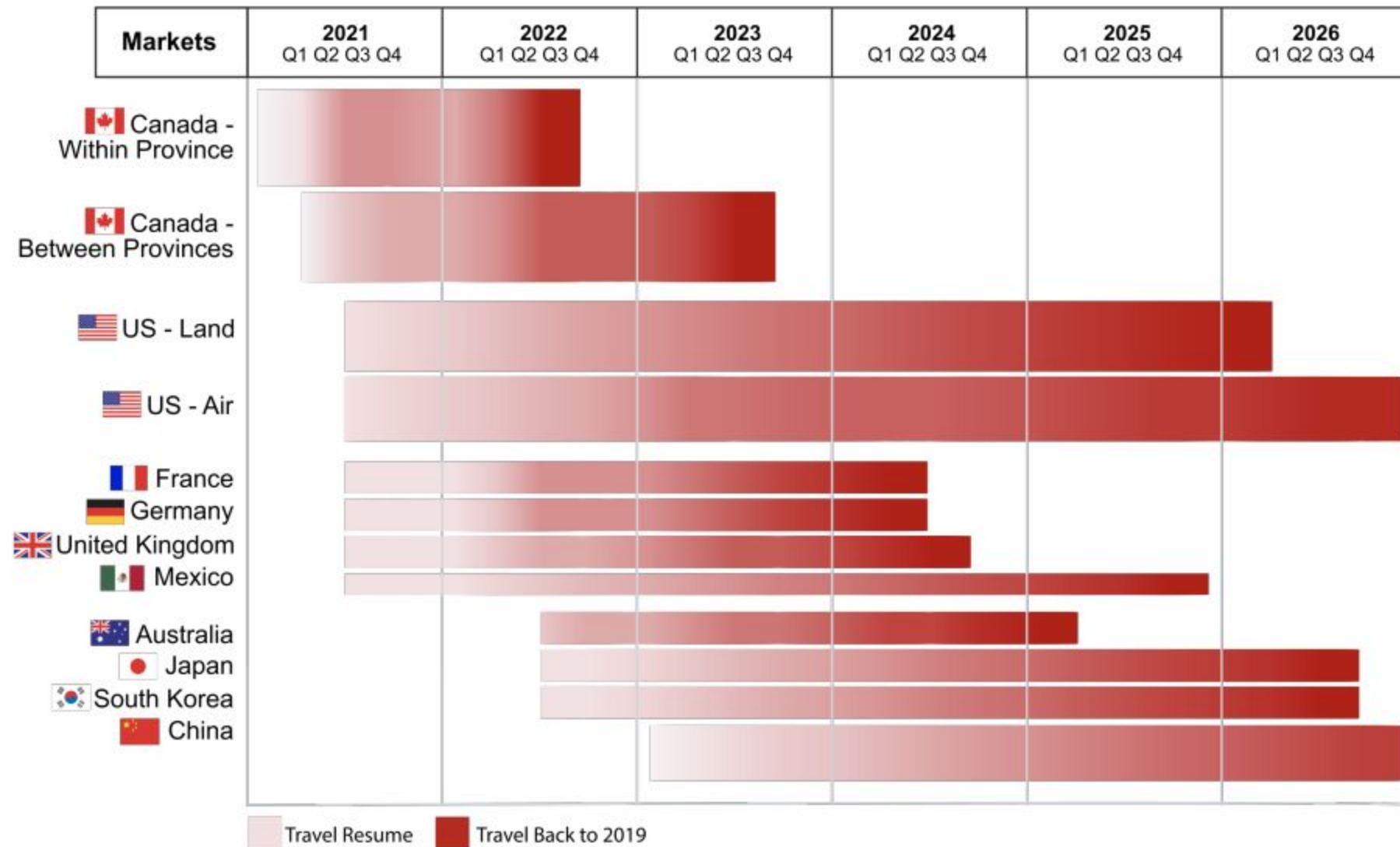


MORE DOMESTIC

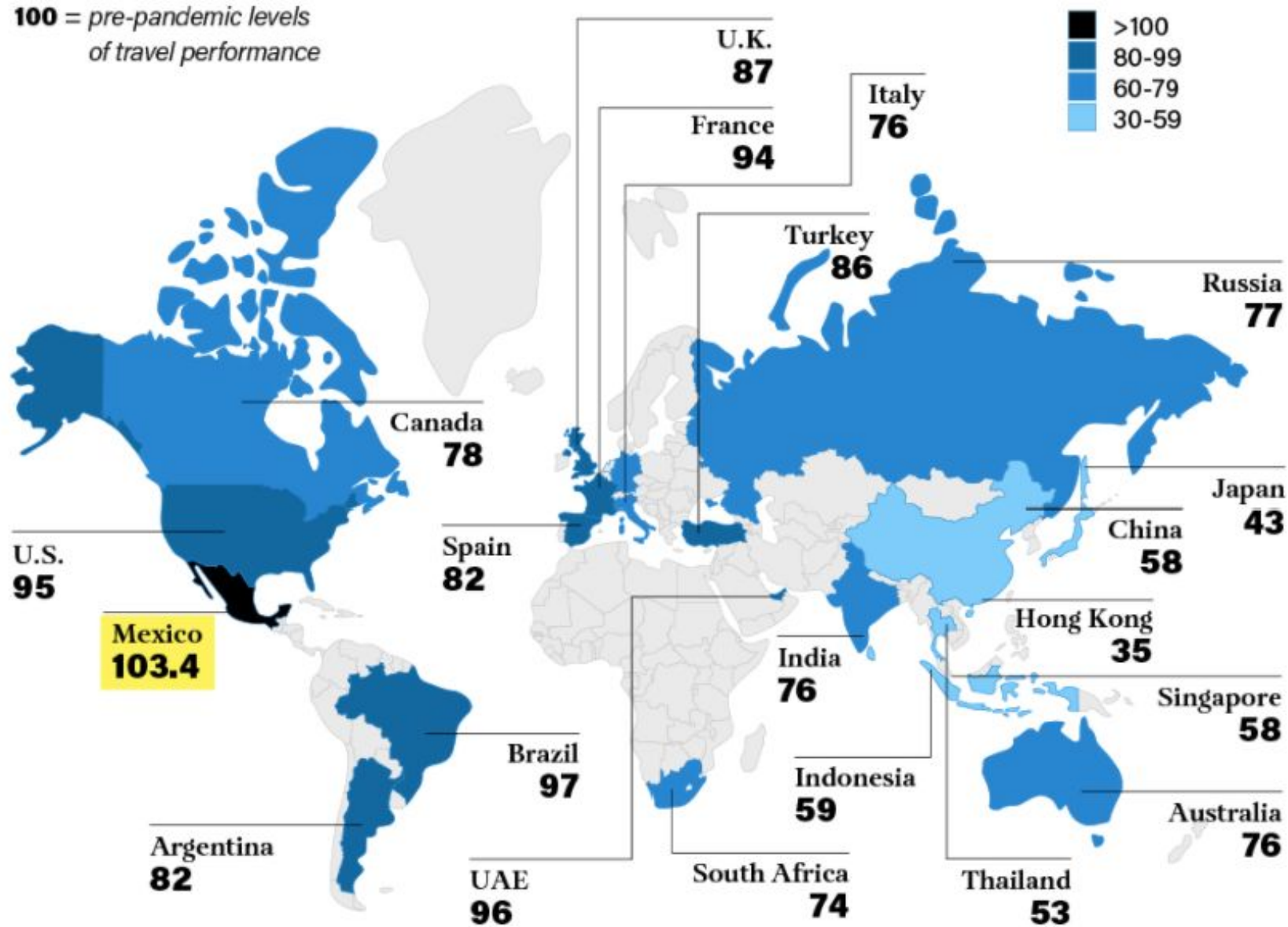


TARGET DOMESTIC
AUDIENCE IN THE
SHORT TERM

FORECAST



100 = pre-pandemic levels
of travel performance



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

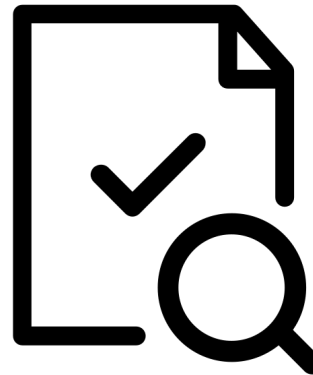


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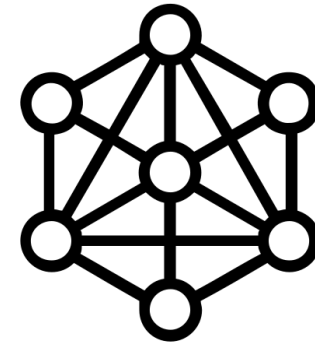
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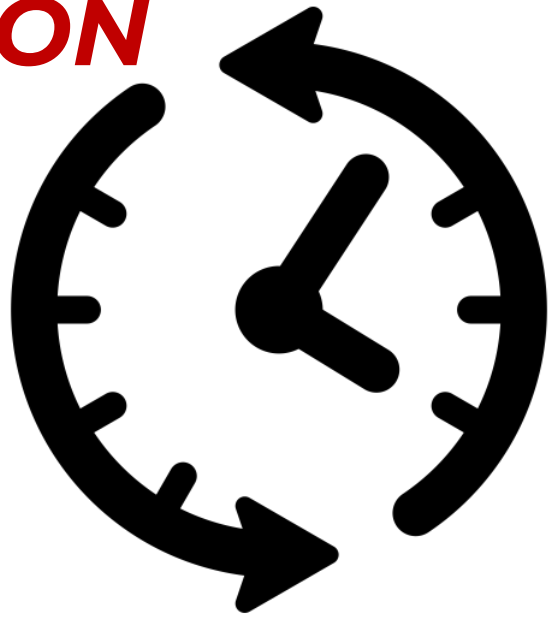


Staying Connected

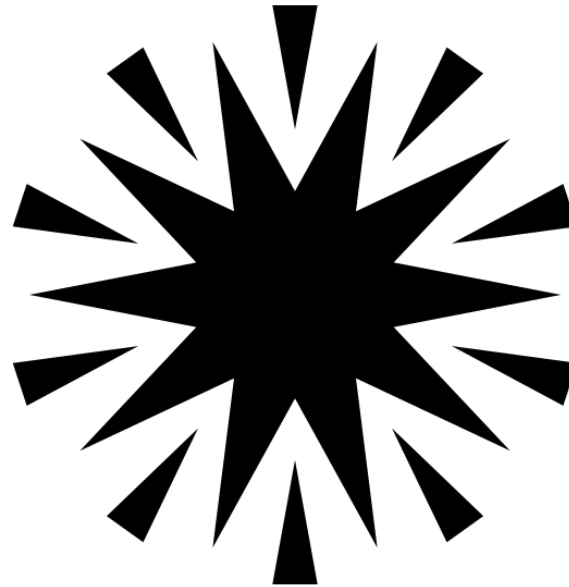


Marketing platforms

***ALWAYS
ON***

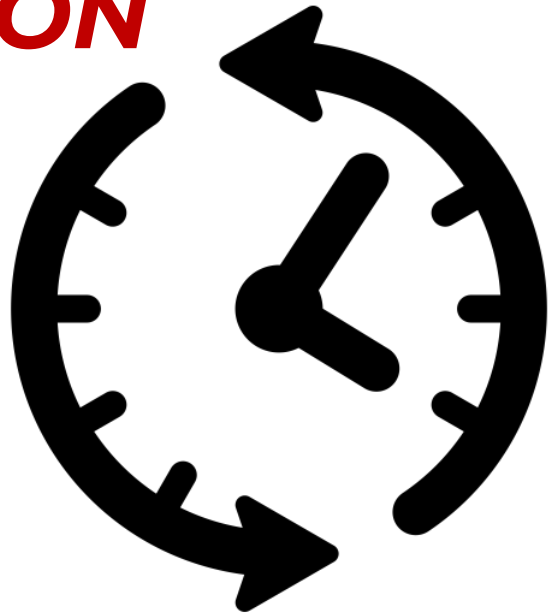


+



***CAMPAIGNS &
CATALYSTS***

***ALWAYS
ON***



DestinationToronto.com

NowPlayingToronto / T.E.D.

Social channels

Search

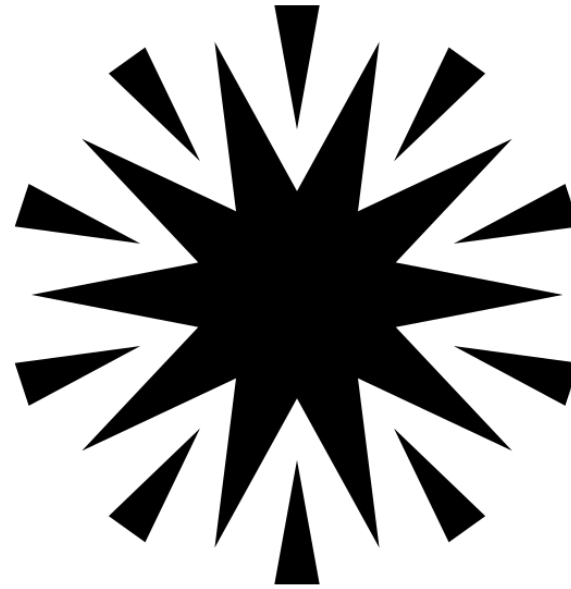
eNewsletters

Media Relations

In-market campaigns

Amplify big stories

Business Events Networks



***CAMPAIGNS &
CATALYSTS***

Content Themes: *Consumer Segment*

ALWAYS
ON



**Local Scenes &
Epic Events**

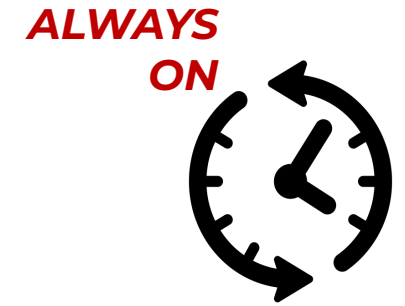


**Globally Inspired
Food & Nightlife**



**Canada - at our
doorstep**

Content Themes: *Business Events Segment*



Vibrant Hub



**Progressive
Culture**

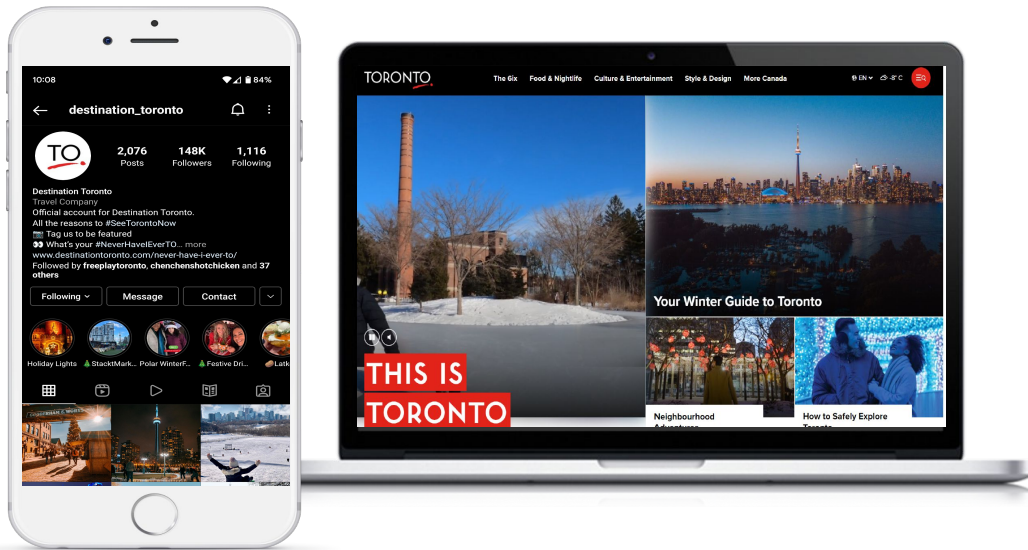
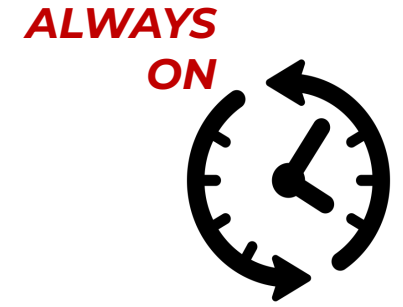


Team Toronto



**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



ACTION:

**Upload your
digital assets**



[View All Assets](#)

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:

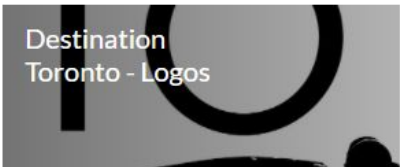
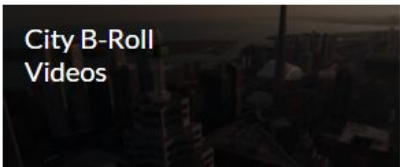
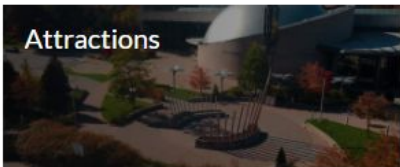
SEARCH: Type keywords into the search bar, and CrowdRiff's image recognition and intelligent search capabilities will find the perfect visuals in seconds.


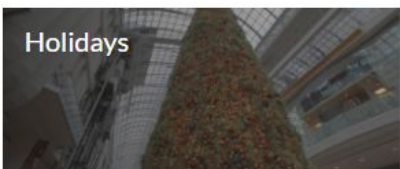

ALBUMS: Assets are sorted into Albums, based on the content within. To search for a specific image or video, simply type the keyword into the search bar, or browse the assets in each album.




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](#).




Albums



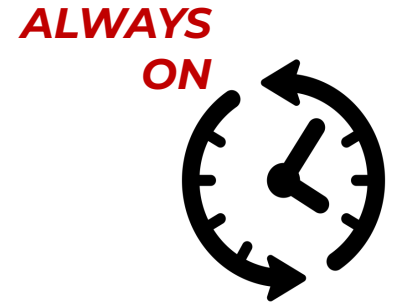








T.E.D. & Now Playing Toronto



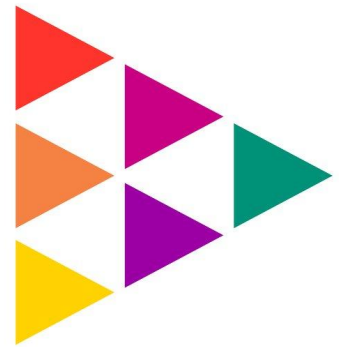
TORONTO EVENTS DATABASE (T.E.D.)

- Comprehensive database of events
- Free to list, one stop
- Network of data feeds

NOW PLAYING TORONTO

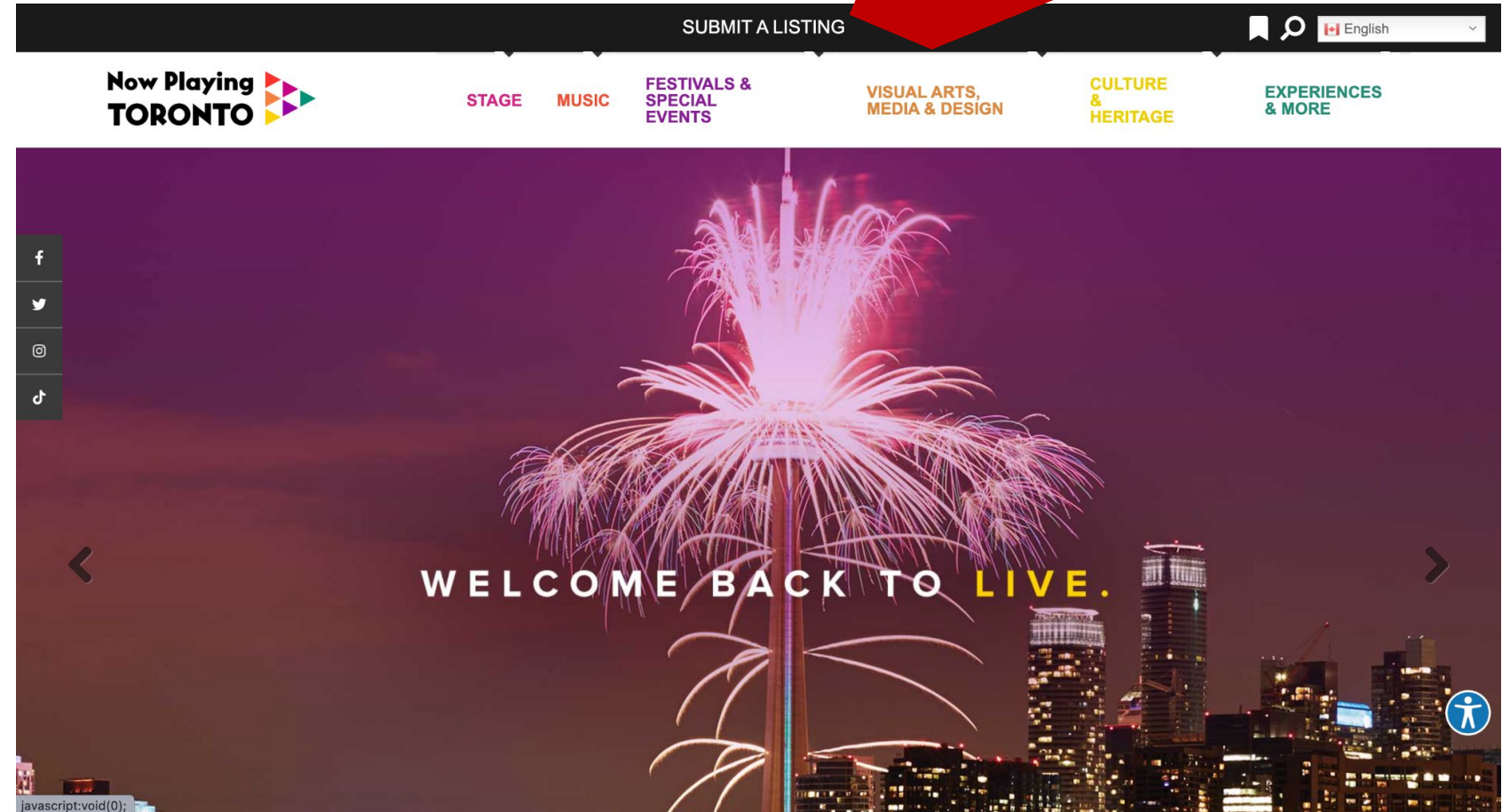
- Aimed at locals
- Encourage discovery of things to do across the entire destination

Now Playing TORONTO



T.E.D. & Now Playing Toronto

ALWAYS
ON

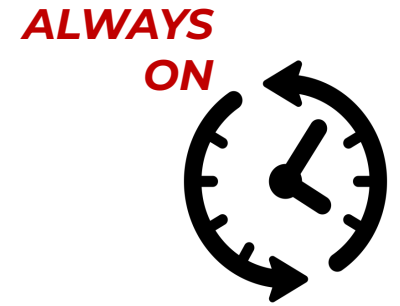
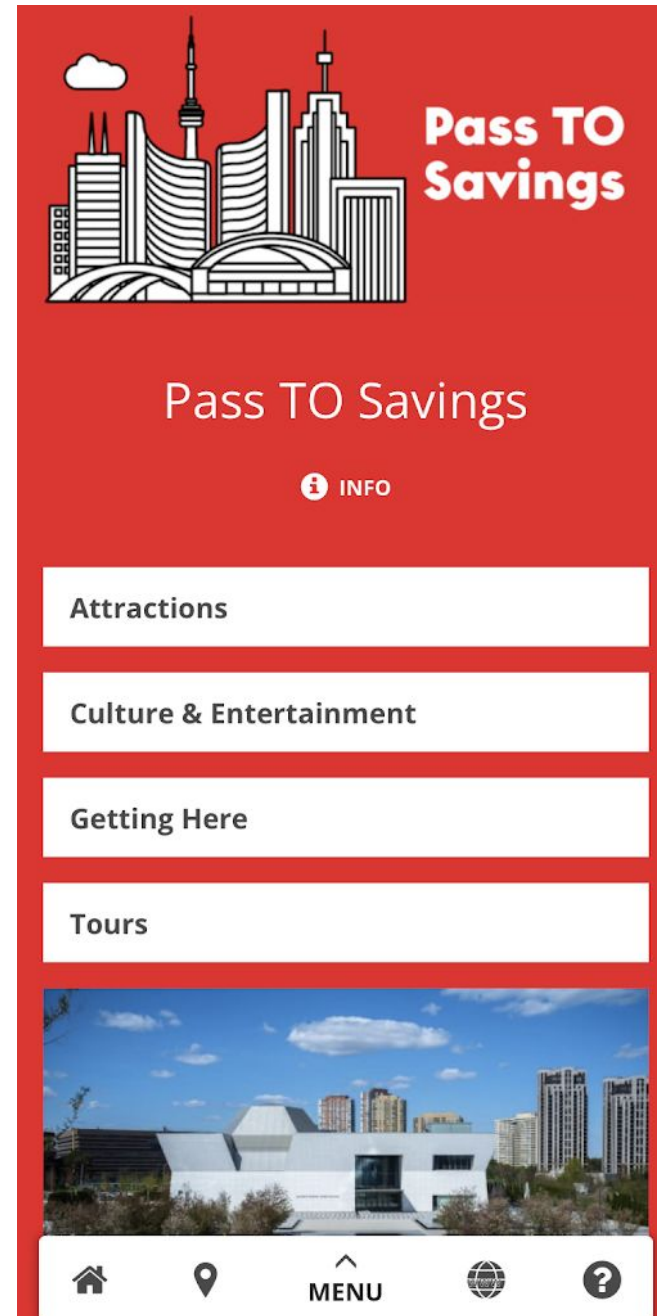


ACTION:

List your events

Pass TO Savings

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

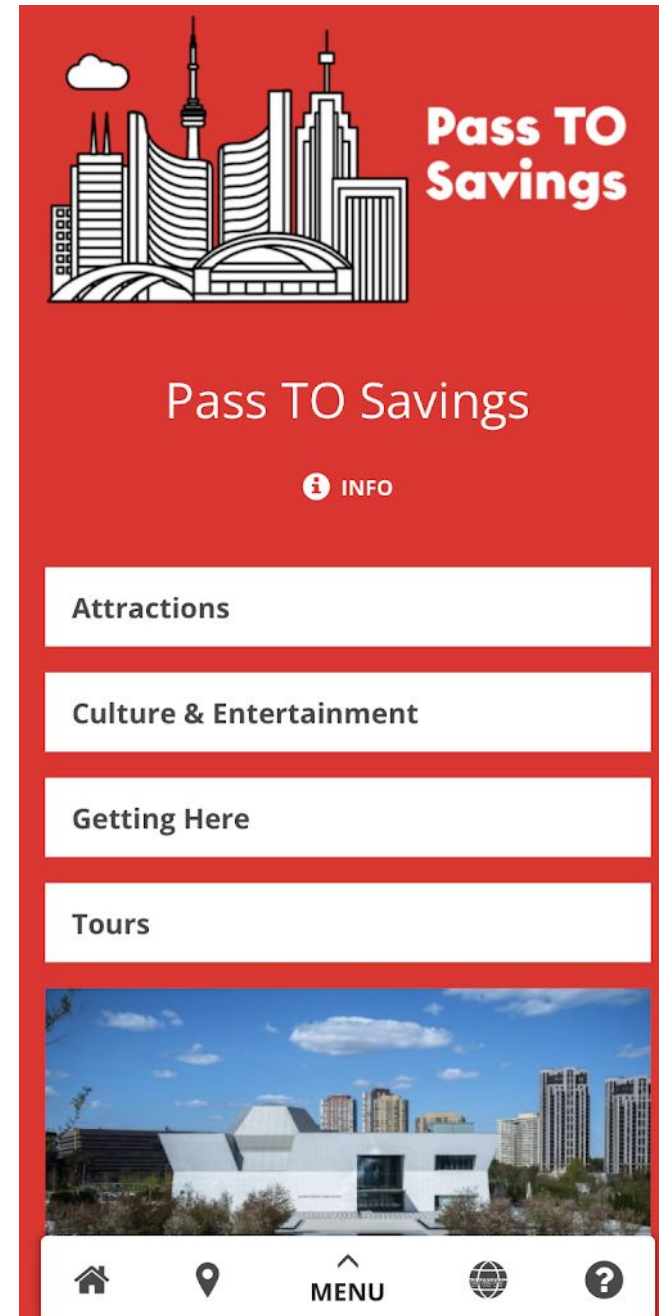


Pass TO Savings



ACTION:

***Participate with
offer - watch for
callout***



**ALWAYS
ON**



Media Relations

ALWAYS
ON



ACTION:

Share your stories

***Respond to media
opportunities***

Maximize DestinationToronto.com

ALWAYS
ON



- Target visitors searching for destination information
- Opportunity to elevate your message
- Run-of-site opportunity



A DIVISION OF SIMPLEVIEW

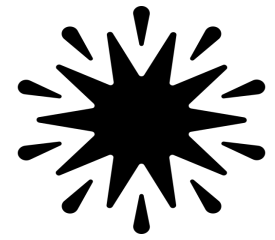


Business Events Platform

ALWAYS
ON



Domestic Drive Market Campaign



**CAMPAIGNS &
CATALYSTS**



Ontario, Quebec

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

Never Have I Ever, TO



ACTION:

***Connect your
content***



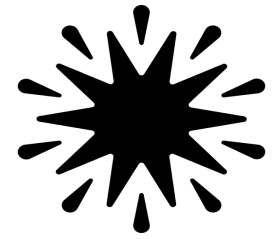
**Never
Have
I Ever TO**

CAMPAIGN PLAYBOOK:
TOURISM RECOVERY CAMPAIGN

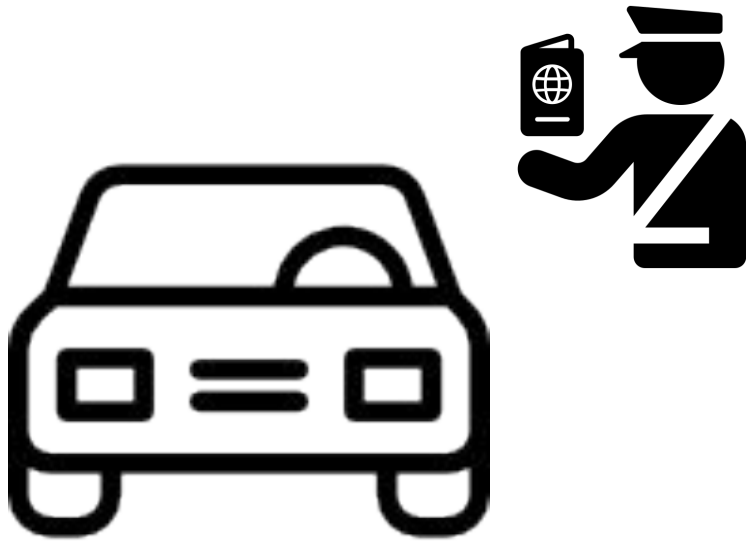
DESTINATION
TORONTO

#NeverHaveIEverTO

U.S Drive Market Campaign



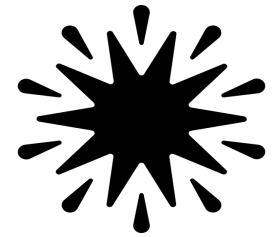
**CAMPAIGNS &
CATALYSTS**



New York State, Michigan

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

U.S. Fly Market Campaign



**CAMPAIGNS &
CATALYSTS**



**NYC / San Francisco & San Jose /
Chicago, Washington, DC**

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

***SALES &
SERVICE***

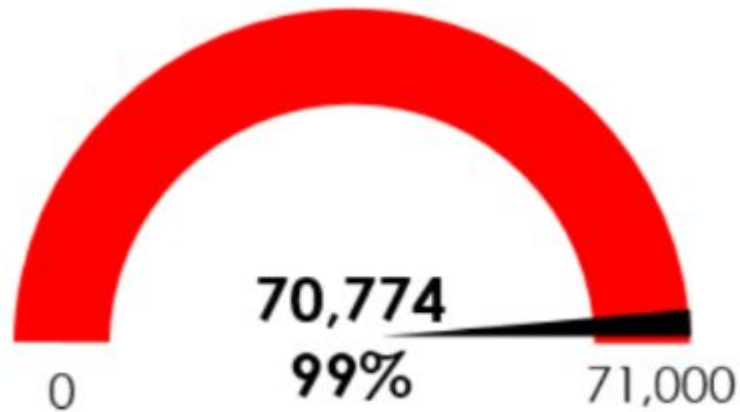


2022 Sales Results (March 31)

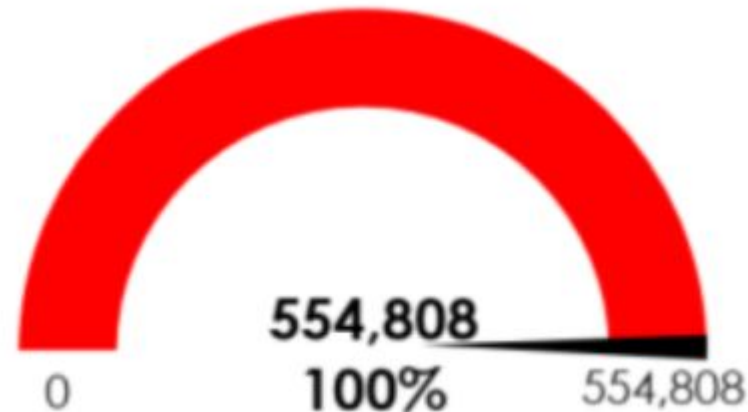
**SALES &
SERVICE**



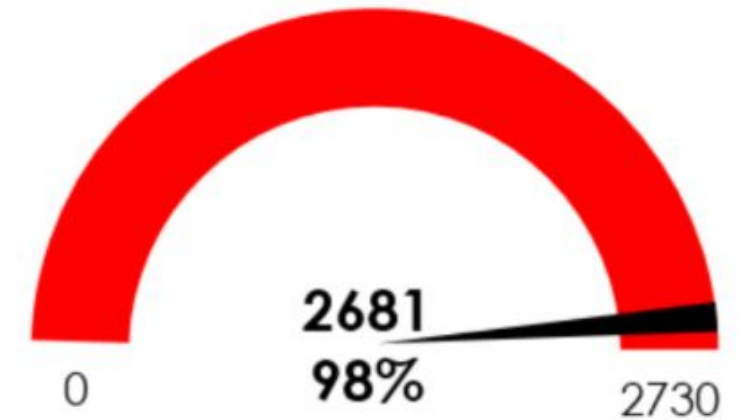
**DEFINITE
Room Nights**



**LEAD
Room Nights**



**PROSPECTING
Activities**



Rebuild Pipeline

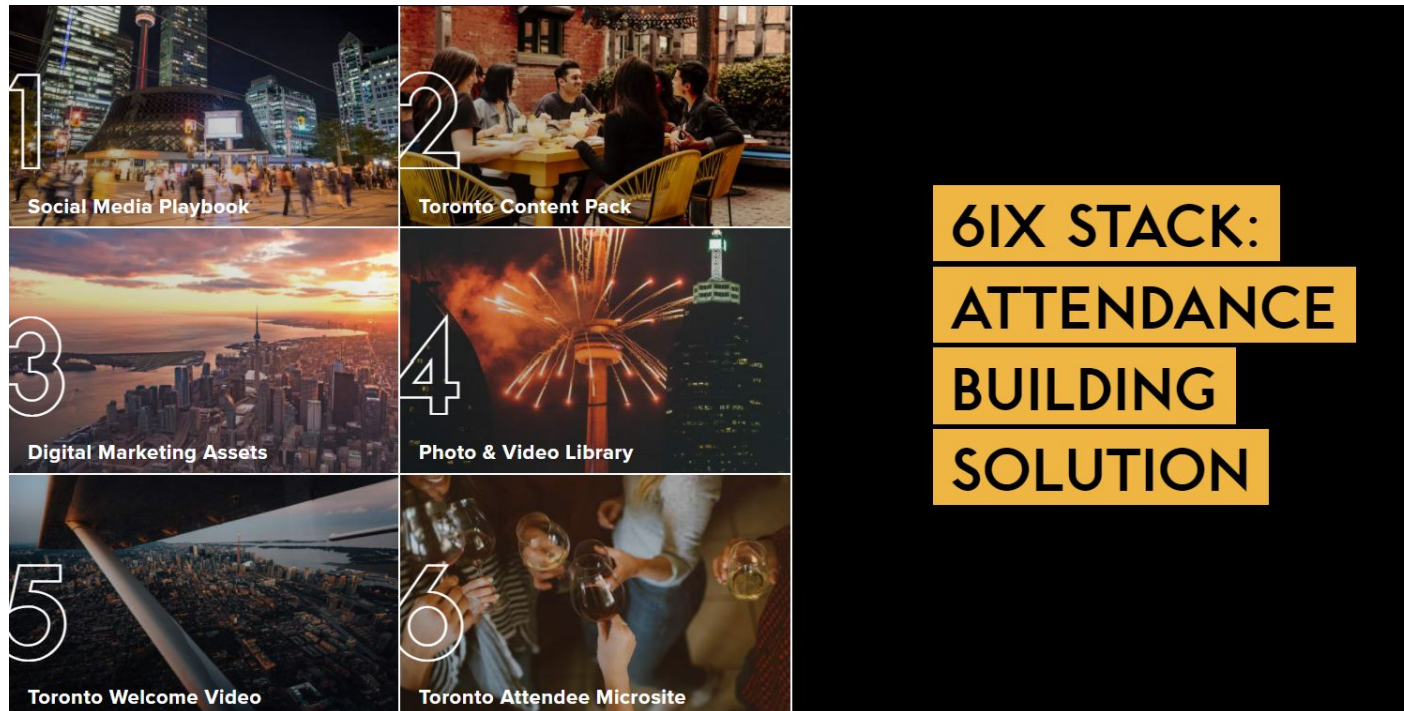
**SALES &
SERVICE**



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

6ix Stack

**SALES &
SERVICE**



- Support meeting planners to drive attendance
- Suite of digital tools
- Key differentiator for Toronto

Re-engage Travel Trade

**SALES &
SERVICE**



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

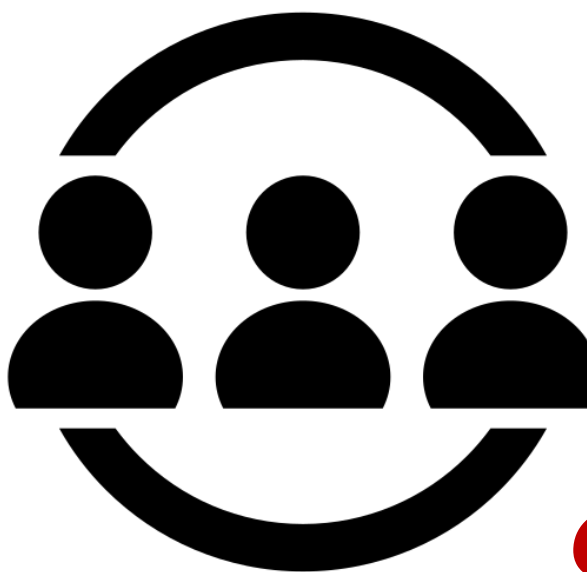
Sales + Service



ACTION:

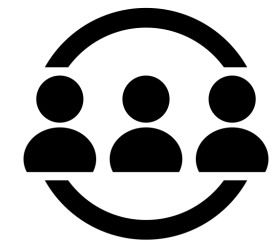
Sign up to join sales initiatives





***COMMUNITY
ENGAGEMENT***

EDGE EVENT SERIES



**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

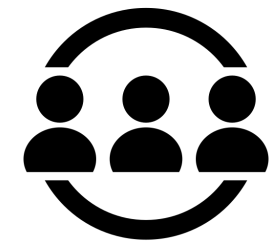
Digital Readiness:

Digital Checklist for Small Businesses

November

Sustainability:

Creating a tourism sustainability action plan



**COMMUNITY
ENGAGEMENT**



Annual General Meeting

Thursday, June 9

Business Outlook Forum

November

The Terminal

A screenshot of the Toronto Business Intelligence website. The header includes the "TORONTO" logo and navigation links for "Business Intelligence", "Education & Events", "Reports & Resources", and "Contact Us". It also shows a language selector for "EN" and a weather icon for "2° C". The main content area features a large yellow banner with the text "RESEARCH & INSIGHTS TERMINAL". Below this, there are two article thumbnails: "Global Lessons for the Future of Destinations" and "Tourism Recovery Programs You Need To Know About For 2022". At the bottom, there is a black banner with the text "INDUSTRY INSIGHTS" and a yellow button labeled "SEE MORE".

TORONTO Business Intelligence Education & Events Reports & Resources Contact Us EN 2° C

RESEARCH & INSIGHTS TERMINAL

DESTINATION TORONTO

Global Lessons for the Future of Destinations

Tourism Recovery Programs You Need To Know About For 2022

INDUSTRY INSIGHTS

SEE MORE

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.

Arrivals and Spend

Accommodations

Business Events

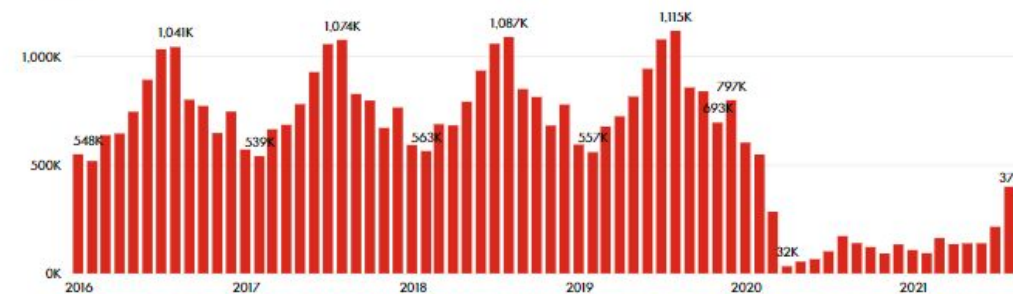
Yearly

Monthly

Country

All

Arrivals



Visitor Spending (\$M)



DESTINATION
TORONTO.

SALES PRODUCTION REPORT

Business Events Sales
First Quarter 2022



1

DESTINATION
TORONTO.

MARKETING INSIGHTS

Business Events Sales
First Quarter 2022



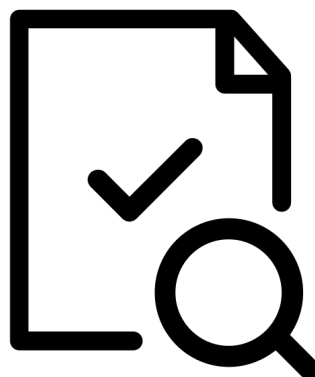
3

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Market Readiness

II

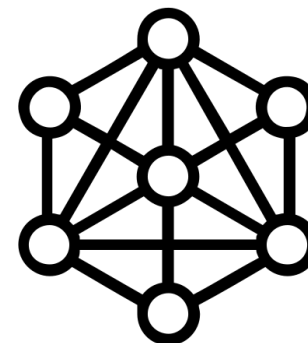


**Key Initiatives +
Platforms**

**Marketing
Sales+Service
Community Engagement**



III



**Connected +
Engaged**

- ❑ 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**



ACTION:
LEVERAGE
BUSINESS
READINESS
TOOLS

- ❑ **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:

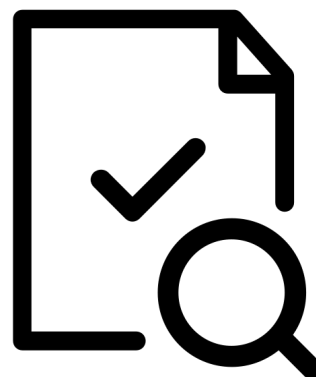
***STAY
CONNECTED***

I



Market Readiness

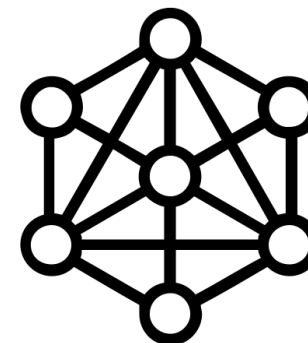
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