# DESTINATION ONTARIO

## An Agency of the Government of Ontario

## ANNUAL REPORT 2022-23

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## MESSAGE FROM THE CHAIR

It was another eventful year as Destination Ontario navigated through changing circumstances and focused on revitalizing the tourism sector. As Board Chair, I am proud to collaborate with my colleagues on the Board and the dedicated team at Destination Ontario to promote Ontario's natural beauty and captivating experiences.

Despite the challenges posed by the pandemic, Destination Ontario remained committed to achieving its strategic goals. While Destination Ontario had to adapt its marketing strategies and explore alternative approaches to support the industry during these uncertain times, the Destination Ontario team worked diligently to provide inspiration for future travel. Destination Ontario is optimistic about fully implementing its plans within the Roadmap to Recovery.

I would like to express our sincere appreciation to the Ministry of Tourism, Culture and Sport for their support in assisting Destination Ontario's endeavours. Furthermore, I extend my gratitude to my fellow Board members, some of whom joined Destination Ontario recently, for their continuous commitment and contribution. I also want to acknowledge Lisa LaVecchia, President and CEO, and her team of devoted staff at Destination Ontario. Their dedication is instrumental in our collective efforts to promote the wonders of Ontario.

Looking ahead, Destination Ontario eagerly anticipates collaborating with all stakeholders to further showcase Ontario. Together, Destination Ontario will continue to strengthen the tourism sector, inviting visitors from near and far to experience the enchantment of our province.

**Todd Halpern**
Chair, Destination Ontario

## MESSAGE FROM THE PRESIDENT & CEO

I am delighted to present the 2022-23 Annual Report as the President & CEO of Destination Ontario, a dedicated marketing organization committed to promoting Ontario's treasures within Canada and across the globe. Despite the challenges brought about by the COVID-19 pandemic, Destination Ontario made significant strides toward achieving its targets as outlined in Destination Ontario’s 2022-23 Business Plan.

While the pandemic has profoundly impacted the tourism industry, and its recovery may be a prolonged journey, Destination Ontario remained steadfast in its commitment to supporting Ontario's tourism industry. Our team showcased resilience and adaptability by exploring new avenues to promote travel experiences, especially during periods when it was safe to do so. Destination Ontario celebrated the rich cultural diversity and the remarkable attractions Ontario has to offer through festivals, events, and promoting the unique tourism experiences found within the beautiful regions of our province.

Although our promotional activities had to pause and restart in accordance with government health guidelines, our focus on driving economic impact and delivering tangible results for the tourism industry remained unwavering. As the leading provincial tourism marketing organization, Destination Ontario collaborated closely with tourism stakeholders, aligning our efforts with the agency's Roadmap to Recovery. Destination Ontario successfully positioned Ontario as a safe and enchanting travel destination to key markets in Canada, the United States (U.S.), and internationally.

I extend my heartfelt gratitude to Todd Halpern, our Board Chair, and the dedicated members of our Board of Directors for their strategic guidance throughout the year. Their leadership has been instrumental in shaping our initiatives and driving our organization forward. I also want to recognize the support Destination Ontario received from our colleagues within the Ministry of Tourism, Culture and Sport. Our collaboration has been invaluable in navigating the challenges posed by the pandemic and charting a path toward recovery.

Looking ahead, Destination Ontario remains committed to supporting and revitalizing this vital industry. Destination Ontario will continue to work tirelessly, leveraging our expertise and resources to showcase Ontario's wonders and drive tourism growth in the days and months to come. Together with our partners and stakeholders, Destination Ontario will help to shape a bright and prosperous future for Ontario's tourism industry.

**Lisa LaVecchia**
President & CEO, Destination Ontario

## CORPORATE OVERVIEW

### Vision
To position Ontario as a preferred global destination.

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

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

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

The following principles support the mandate:

(a) Destination Ontario is to lead the marketing of Ontario as a travel destination nationally and internationally;
(b) Destination Ontario and regional organizations are to work together to market travel within Ontario;
(c) Destination Ontario is to deliver marketing services that contribute to regional and economic development;
(d) Destination Ontario is to become a centre of excellence supporting provincial marketing; and
(e) Destination Ontario is to engage in partnerships to support the above objectives.

Destination Ontario is the organization’s corporate operating name; the Ontario Tourism Marketing Partnership Corporation (OTMPC) will continue to be the official legal name of the organization as per Ontario Regulation 618/98 under the *Development Corporations Act*.

## ORGANIZATIONAL OVERVIEW
Destination Ontario is a dynamic organization that collaborates across all areas of the organization to deliver on its mandate of positioning Ontario as a renowned tourism destination while fostering economic growth for tourism businesses. Our structure includes the following key areas: President's Office; Marketing, Strategy and Insights; Industry Relations, Media Relations and International Marketing; and, Corporate Services and Operations. By leveraging the collective resources and expertise of these areas, Destination Ontario strives to optimize the impact of our activities and programs.

In a typical marketing year, Destination Ontario engages in a wide range of day-to-day organizational activities to promote Ontario's tourism offerings. However, the year 2022-23 continued to present unique challenges due to the ongoing presence of COVID-19 and its profound effects on Ontario's tourism industry. Consequently, Destination Ontario's activities adjusted to focus on providing the best possible support to the industry during these unprecedented times.

### President's Office

The President's Office provides executive support to the President and CEO in operational planning, management, and implementation of the agency's initiatives, including corporate communications and management of the Board and industry committees. Additionally, as an agency of the Ministry of Tourism, Culture and Sport (MTCS), Destination Ontario regularly liaises with the Ministry and collaborates across Ministerial portfolios where applicable.

### Marketing, Strategy and Insights

### Marketing and Creative Services

Destination Ontario's primary mandate, as the lead provincial tourism marketing organization, is to market Ontario as a preferred tourism destination. Destination Ontario builds integrated marketing campaigns to position Ontario as a desirable travel destination and increases overnight travel intention within Ontario, across Canada and in priority U.S. and international markets. Destination Ontario leverages media and content strategies to connect with potential travellers through channels like connected TV, radio, sponsored content, digital and social media.

The organization's consumer website (DestinationOntario.com) uses a data-centric approach to deliver qualified travel leads to Ontario tourism partners and operators by making the website discoverable, engaging and conversion efficient, ensuring the user experience is as frictionless as possible. The corporate website (DestinationOntario.com/corporate) provides the tourism industry with research highlights, marketing opportunities and information on Destination Ontario's plans, programs, partnership opportunities and the ability to submit content and story ideas.

The Destination Ontario Creative Services team manages in-house creative work, including creating video content, photography, graphic design and campaign asset development. The team also manages the Destination Ontario Media Hub (DestinationOntario.com/image) and provides assistance to stakeholders interested in using rights-managed Ontario visual assets for promotional purposes.

### Northern Marketing and Partnerships

Destination Ontario has a specific focus on increasing visitation to Northern Ontario and works with Northern tourism partners (Regional Tourism Organizations (RTOs) 13 and 12, Destination Marketing Organizations (DMOs), sector associations and individual tourism operators) to market the North's unique experiences and natural landscapes. While the North as a destination is promoted and integrated across all the agency's

work, avid experiences such as powersports and touring, angling and hunting, and outdoor adventure are of particular importance and focus.

**Technology, Data and Insights**
Destination Ontario conducts tourism research that provides market intelligence and consumer behaviour analysis to enable the agency and tourism operators to make informed business decisions, be flexible to changing landscapes and deliver results for tourism businesses. Mobile, AI and digital tools continue to impact how travellers find, research, and plan their travel. It is important that Destination Ontario continues to take a leadership role in piloting new tools and performing in-market media asset and content tests to deliver contextually relevant content.

Destination Ontario tracks the success of marketing campaigns to ensure a sound return on investment and learnings for future campaigns with a view of maximizing value for money. Consumer travel intention and motivators studies and product research core insights are used to inform Destination Ontario plans and campaigns.

To develop effective marketing, Destination Ontario must measure results, and understand where the organization has succeeded and where it must improve and bring more value to the sector. The team uses measurement, campaign performance and insights to inform marketing strategies. This team is also responsible for designing in-market tests, agile marketing initiatives and evaluation of campaign effectiveness. Learning is further enhanced by consumer insights like brand health research to further refine strategies to meaningfully connect with consumers while maximizing value for money.

Destination Ontario's in-house technology team is a newer function of the organization dedicated to building, optimizing and maintaining Destination Ontario web properties and marketing technology stacks. The opportunity to bring this talent and ability in-house grows the capacity to be a modern marketing agency, learning, adapting and optimizing in real-time effectively and efficiently.

**Industry Relations, International Marketing and Media Relations**

**Industry Relations**
As the lead provincial tourism marketing organization, Destination Ontario is uniquely positioned to offer industry stakeholders the opportunity to leverage the agency's programs and activities to market their experiences and products. The agency partners with RTOs, DMOs, sector associations, Ministry sister agencies, Destination Canada and private stakeholders to increase tourism visitation and spend across the province.

In its role as the lead provincial marketing organization, Destination Ontario takes a collaborative approach to supporting partners, with a focus on driving direct results to local tourism businesses. Destination Ontario lends expertise directly to partners by sharing insights, research, communications tools, and marketing support to help the industry grow business and bolster economic activity.

**International Marketing**
Destination Ontario promotes Ontario as a travel destination in key international markets and works closely with Destination Canada and travel companies (tour operators, wholesalers, and travel agents) to increase awareness of the province and drive sales of Ontario's market-ready tourism products and experiences through both direct-to-consumer activities (e.g., campaigns, web, social, search) and business development tactics (e.g., sales missions, training, marketplaces, events).

Priority markets for this team include the United Kingdom (U.K.), Germany, France, China, Japan, South Korea, Mexico and Australia. An integral team of in-market representatives in the U.K., Germany, China and Japan, supports Destination Ontario through market intelligence, developing strategies, maintaining relationships with travel companies, and executing tactics. Keeping Ontario top-of-mind in an extremely competitive travel trade is crucial. Leveraging the in-market team to maximize Ontario's voice through these channels will be key to Destination Ontario's recovery efforts.

**International Media and Public Relations**
Destination Ontario generates positive third-party media coverage of Ontario as a must-see destination by working closely with editors, journalists, influencers and broadcast media partners. Travel to Ontario is promoted through customized media tours; targeted media pitching; storytelling; sharing of creative assets and content; radio and television broadcasts; livestreams; content partnerships; consumer activations; and participation in trade shows, media marketplaces and events.

Key markets for this team include Canada, U.S., U.K., Germany, France, China, Japan, South Korea and Mexico. Destination Ontario's media relations team also leverages the work of Destination Canada and in-market representatives to ensure a collaborative approach to recovery. Authentic, third-party earned media coverage provides a high return on investment, generating consumer interest and inspiration that ultimately delivers travel results.

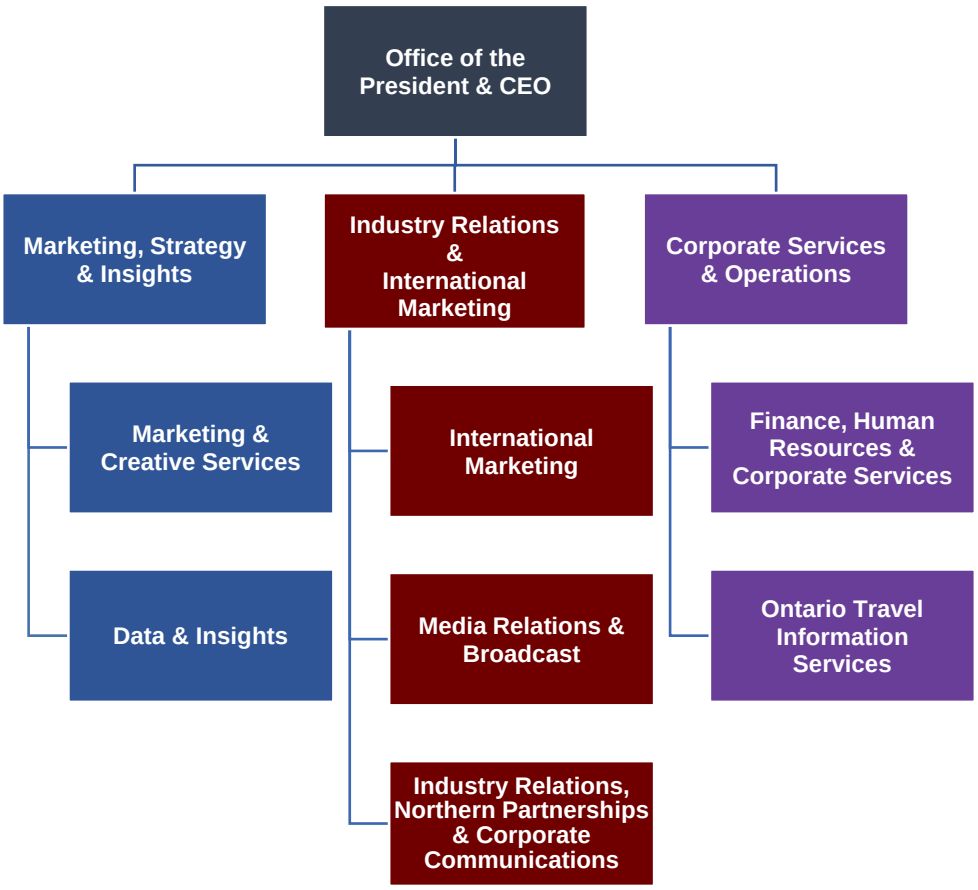
**Corporate Services and Operations**

**Finance and Corporate Services**
The Finance and Corporate Services team oversees business operations, financial controllership and administration, procurement and contract management, human resources, facilities and administrative services, and information technology services management. The team provides strategic direction and leadership in the planning, delivery and evaluation of all corporate service strategies, systems and controls to support the ongoing business operations of Destination Ontario, including financial planning and reporting, and executing agreements efficiently and effectively to support industry partners. This program area is also responsible for business continuity planning in the event of an emergency.
**Ontario Travel Information Services**

Ontario Travel Information Services (OTIS) provide a warm welcome to visitors, whether in-person, on the phone, by email or virtually. Destination Ontario's experienced and knowledgeable travel counsellors offer visitors valuable information on travel ideas in Ontario to enhance their trip planning process and help them discover the variety of experiences available in Ontario. Operations of the Ontario Travel Information Centres (OTICs) continue to be guided by government health protocols and safety measures.

Destination Ontario continues to evolve its modernization initiatives through a 'Visitor Care' approach to enhance the delivery of tourism information services to visitors and industry beyond the traditional bricks-and-mortar model, meet changing consumer expectations, and support recovery through modernized services.

## ORGANIZATION STRUCTURE




## CORPORATE GOVERNANCE

### Board of Directors

Destination Ontario is governed by a Board of Directors comprised of business leaders who are appointed by the Lieutenant Governor in Council, based on recommendations from the Minister of Tourism, Culture and Sport. The Minister receives advice on Board membership from the Chair and other interested parties. The volunteer Board of Directors do not receive remuneration, though they are eligible to claim allowable expenses under Ontario's Travel, Meal and Hospitality Expenses Directive.

**Board of Directors** (for fiscal year April 1, 2022 – March 31, 2023)

**Todd Halpern, Chair**
President
Halpern Enterprises
Toronto, ON
Oct 1, 2020-Sep 30, 2023

**Sumeeta Kohli**
Owner
GLocal Marketing
Mississauga, ON
Apr 16, 2020-April 15, 2026

**Jesse Hamilton**
Port Carling, ON
May 21, 2020-May 20, 2026

**Cathy Kirkpatrick**
Partner
Alphabet
Ottawa, ON
May 21, 2020-May 20, 2023

**Andrew Dowie**
Professional Engineer
City of Windsor
Tecumseh, ON
May 28, 2020-Jun 5, 2022

**Jasveen Rattan**
Consultant
Mississauga, ON
June 11, 2020-June, 10, 2023

**Lauren McDonald**
Director, Digital + Campaign Strategy
Creative Currency
Toronto, ON
Jan 21, 2021-Jan 20, 2024

**Dennis Matthews**
Vice President
Enterprise Canada
Toronto, ON
Mar 11, 2021-Mar 10, 2024

**Danielle Chretien**
Owner/Manager
Lake on the Mountain Resort
Prince Edward County, ON
Apr 29, 2021-Apr 28, 2024

**Robert Taylor**
Director of Policy and Government Relations, Wine Growers Canada
Toronto, ON
June 10, 2021-June 09, 2024

**Benjamin Purkiss**
Owner Ben Purkiss Design
Creative Director
Grimsby, ON
Oct 07, 2021-Oct 6, 2024

**Nelly Morgado**
Director
Canadian Cancer Society
Toronto, ON
Mar 04, 2022-Mar 03, 2025

**Jerry Pribil**
President
Marienbad Hospitality
London, Ontario
Jan 19, 2023-Jan 18, 2026

**Maud Murray**
Deputy Minister
Ministry of Red Tape Reduction
Brampton, ON
17-Nov-2022 - 16-Nov-2023

## STRATEGIC DIRECTIONS

Destination Ontario relied on its strategic playbook, while working on developing a new three-year strategic plan, using its corporate priorities as the backbone to focus on key areas, including Collaboration, Modernization, Research, and Growth, to guide the agency's marketing strategies to support increased visitation and generate expenditures. Destination Ontario recognizes that pre-COVID-19 visitation and spending levels may take some time to rebuild. Therefore, Destination Ontario's new three-year strategic plan will refresh and validate the organization's direction in this environment.

In 2018, Destination Ontario released its *Strategic Playbook 2018-2021*, a three-year strategic plan for the organization. Key objectives of the plan include to:

- Grow visitor volume and expenditures from Ontario's priority markets
- Work across the industry through content and partnerships
- Build a strong Ontario brand and regularly measure its impact
- Provide content that visitors want and need

Four strategic priorities are identified:

**Visitor First Marketing** focused on anchoring marketing campaigns in consumer insights, search interest data and product segmentation information to help reduce friction and provide value to potential travellers; inspiring consumers through passions and interests to travel to and around Ontario while focusing investment on highest return markets.

**Re-defining Partnerships** focused on leading collaboration with industry partners for mutual success, and strong return on investment. In the international markets, Destination Ontario to leverage the Canada brand and Destination Canada's work to place Ontario top of mind in key, high potential markets and measure results driving increased visitation and spend across Ontario.

**Strong Research, Strong Outcomes** focused on a holistic research approach to improve how data are mined to incorporate insights into strategic planning and marketing activities across the agency. And, to further enhance understanding of the consumers' path to purchase.

**Dynamic Organization** focused on connecting, leading and inspiring through a team approach within the organization and across the industry. To nurture a nimble culture of ongoing program evaluation and personal and program performance.

## ACTIVITIES AND ACHIEVEMENTS

Despite the lifting of most COVID-19 restrictions in 2022-23, the tourism industry still faced challenges in returning to pre-pandemic levels. Border crossings and hotel occupancy rates were not yet back to normal. Destination Ontario, for the fiscal year April 1, 2022, to March 31, 2023, continued its focus on supporting the tourism industry through another difficult year with COVID-19. The impact of the pandemic on the tourism and travel industry remained significant.

While in regular years, Destination Ontario would concentrate on growing tourism visitation and increasing expenditures, the limitations on non-essential travel hindered these efforts. As a result, the organization had to pause many of its regular program activities. This included targeted marketing campaigns, media relations, broadcast programs, travel trade activities, joint marketing opportunities, partnerships, consumer information services, and in-person visitor services.

However, despite the pause on traditional programs, Destination Ontario leveraged its expertise and resources to support the industry whenever possible. The organization actively worked to keep Ontario top-of-mind for future travel and supported tourism initiatives that could be safely carried out. This involved promoting virtual content, the 1-800-ONTARIO toll-free tourism line, the Destination Ontario website, piloting virtual travel counseling (VTC) services, roaming ambassadors and mobile visitor information centers (VICs), and providing support for local and hyperlocal activities. Through these efforts, Destination Ontario maintained awareness of Ontario's tourism industry and helped sustain its relevance.

## PRESIDENT'S OFFICE

### President's Office

The President's Office worked closely with the Board of Directors, Destination Ontario's senior management team, and the Ministry to help Destination Ontario support the tourism industry through the COVID-19 pandemic. With the appointment of several new Board members, the President's Office assisted in on-boarding new members and provided support to the President and CEO in a variety of stakeholder events, including meetings, presentations, and roundtables.

### Board of Directors

Destination Ontario's Board of Directors met four times throughout the year to provide advice, strategic direction and oversight related to agency activities.

## MARKETING, STRATEGY AND INSIGHTS

Destination Ontario's annual goals for all markets were to generate 606K in incremental visitation and $171.4M in incremental spend along with 9.04M leads to industry.

Destination Ontario achieved over 392K total incremental visits and $180M in incremental expenditures, including 12M leads to partners and industry – exceeding the target by 30% (Ontario, Canada, U.S., International markets of focus). While the incremental visitation numbers came under the target, the incremental spend paced over the target. This shift is likely due to higher cost of travel, inflation, pent-up savings, a focus on overnight visitation and targeting of higher value travellers and markets. Additionally, Destination Ontario's partnered marketing systems are getting more effective and efficient in reaching target audiences in each market of focus as more campaigns are delivered, data is analyzed, and performance is optimized.

**Roadmap to Recovery**

Destination Ontario continued to implement the final year of the Board approved phased Roadmap to Recovery strategic plan to help support the tourism industry during and post the COVID-19 pandemic. Destination Ontario's Roadmap to Recovery was developed in alignment with the Government of Ontario's *Framework for Reopening our Province* and execution of the phases of the Roadmap to Recovery was guided by the Ministry and all government health protocols and in lockstep with government direction.

The Roadmap to Recovery is fueled by market plans informed by the best possible market intelligence available to make timely and responsible decisions while remaining flexible. Destination Ontario developed its marketing activities based on strong strategies, effective media planning and impactful creative ideas to generate incremental visitation and incremental expenditure. Destination Ontario will support the industry by driving consumer leads to tourism businesses through impactful partnership campaigns.

The final phases of the Roadmap to Recovery are:

1. Ontario Market – encouraging Ontarians to travel in Ontario and invest back into the province with the help of a travel incentive.
2. Canada Market – encouraging Canadians to stay in Canada and choose Ontario for short and long-haul travel.
3. United States Market – inviting back the U.S. traveller to Ontario through drive and fly market plans.
4. International Markets – business development, media relations and consumer marketing activities followed a flexible, phased, market-by-market approach to international recovery, guided by market readiness and public health guidelines in Ontario. The three stages unique to international marketing were implemented throughout the Roadmap to Recovery: 1) Prepare and remind, 2) Inspire for future, 3) Welcome back.

**Ontario Market Plan**

The annual plan for the Ontario market focuses on seasonality and product experiences to encourage Ontarians to plan a getaway in Ontario. This cautiously optimistic plan aligned with the Ontario government health and safety guidelines while being flexible in responding to changing conditions. It was anchored by a collaborative, partnerable

marketing system that leveraged partner content and connected consumers with trip ideas and tourism business operators.

Destination Ontario delivered three partnered seasonal campaigns and a holiday support local campaign in 2022-23, as outlined in the business plan. The seasonal Ontario marketing plans for fall and winter with a collective media investment of $1.9M delivered 167.3K in incremental visits and $40.5M in incremental expenditures. Based on the revenue modelling, this campaign generated a Return on Investment (ROI) of $1: $21.32. Overall, the Ontario fall and winter campaigns were successful investments in generating incremental expenditure in Ontario.

A key driver for Destination Ontario's Ontario market advertising is driving qualified leads to partners. The Ontario market plan had a target of 2M leads to industry, and Destination Ontario achieved 5.8M leads from all Ontario marketing activities. The significant performance is due to a strong indicator of interest, signals of recovery from domestic travellers in Ontario and the strong performance, effectiveness and relevance of creative, media and content strategies.

Campaigns for the year:

1. Ontario Market – Spring/Summer Campaign
2. Ontario Market – Fall campaign
3. Holiday Campaign
4. Ontario Market – Winter campaign

The marketing objectives for the Ontario Market Plan are to:

- Encourage Ontarians to plan at least one domestic overnight trip in Ontario
- Activate a Destination Ontario-led marketing system with industry partners that leverages and aligns Destination Ontario and partner sites and connects qualified consumers directly with tourism business operators
- Engage travellers with value-driven content that includes planning and social content and broadcast and media relations coverage to further drive consideration of Ontario travel experiences

**ONTARIO MARKET PLAN – SPRING/SUMMER CAMPAIGN**

Destination Ontario launched a spring campaign to encourage domestic overnight travel. This plan focuses on Ontario-wide seasonal content and tourism product experiences to encourage Ontarians to plan a getaway. It is anchored by a collaborative, partnerable marketing system that levers partner content and connects consumers with trip ideas and operators while highlighting the Ontario Staycation Tax Credit.

The media strategy had two primary strategic media pillars. The first is destination awareness which focused on high reach media channels to keep domestic travel top of mind for Ontarians. The second is prospecting leads to Ontario tourism partners and operators through a marketing system supporting seasonally relevant industry and operator content focused on the following product categories, Food & Drink, Outdoor

Adventures, Family Attractions, and Arts & Culture. This system was successfully piloted in 2021-22. For this campaign, there were 12 partners participating. Partners contributed $240K to the campaign media spend.

The campaign targeted adult Ontarians aged 21 – 64, through Connected TV, digital video, sponsored content and social ads from April 25 – June 5, 2022. With a media investment of $950K, Destination Ontario was able to generate 1.3M completed video views on digital channels, 175K web visits to Destination Ontario website planning content and 955K leads to partners and operators from campaign and Destination Ontario planning content. Additionally, 75% of all respondents think of Ontario when asked about a destination for short getaways – up from 71% in the fall 2021. Further, 51% of aided responses recalled that Ontario is offering a vacation tax credit – up from 44% pre campaign.

**ONTARIO MARKET PLAN – FALL CAMPAIGN**

The fall campaign continued the annual strategy for the Ontario market, encouraging overnight stays and highlighting the Ontario Staycation Tax Credit. The campaign showcased the product spotlights of Outdoors, Food and Drink and Arts and Culture. This campaign leveraged partner content and operators to encourage trip planning in Ontario this fall. Ten partners participated in the fall campaign. Partners contributed $200K to the campaign media spend.

The campaign targeted adult Ontarians aged 21 – 64, through radio, sponsored content with the Globe and Mail, Destination Ontario planning content traffic drivers and social and discovery digital ads running from August 29 – October 8, 2022. With a media investment of $1.95M, Destination Ontario was able to generate 98.4K incremental trips and $24.3M in incremental expenditures with a campaign ROI of $1: $29.15. The campaign drove 1.29M leads to partners and operators from the campaign and Destination Ontario planning content – exceeding our leads target. Additionally, over 183K web visits to Destination Ontario website planning content. The ad tracking study found that 85% of all respondents are planning to make an overnight pleasure trip in Ontario over the next three months – an 8% lift post campaign. Among those aware of the tax credit, 42% said that it influenced them to book a getaway or vacation within Ontario in 2022-23.

**HOLIDAY CAMPAIGN**

This campaign was designed to encourage Ontarians to support local during the holiday season. The campaign had a modest budget of $100K. The campaign’s focus was to help encourage revenue for local businesses and experiences during the holiday season by buying local experiences, packages and gift cards for future use. Additionally, the campaign also encouraged Ontarians to experience local holiday festive experiences and events.

The campaign targeted adult Ontarians aged 21 – 64, through social and digital planning content from November to December. With a media investment of $100K,

Destination Ontario was able to generate over 300K to dedicated content about local businesses leading up to the holiday season.

**ONTARIO MARKET PLAN - WINTER CAMPAIGN**

The winter campaign continued to build on the annual strategy for the Ontario market, encouraging overnight stays and supporting partners and operators through a marketing system. The campaign showcased the product spotlights of Outdoors Adventures, Food and Drink and Spa and Wellness Experiences. This campaign leverages partner content and operators to encourage trip planning in Ontario this fall. Twelve partners participated in the winter campaign. Partners contributed $240K to the campaign media spend.

The campaign targeted adult Ontarians aged 21 – 64, through radio, sponsored content with the Globe and Mail, Destination Ontario planning content traffic drivers and social and discovery digital ads running from January 9 – February 19, 2023. With a media investment of $1.78M, Destination Ontario was able to generate 68.9K incremental trips and $16.2M in incremental expenditures with a campaign ROI of $1: $15.21. The campaign drove 1.73M leads to partners and operators from the campaign and Destination Ontario.com planning content – exceeding our 1.6M leads target. Additionally, over 325K web visits to Destination Ontario website planning content. The ad tracking study found 88% of all respondents are planning to make an overnight pleasure trip in Ontario over the next twelve months – a 9% lift post campaign. Further, 33% of all respondents searched for information on Ontario travel in past month – a 6% lift post campaign

**CANADA MARKET**

Destination Ontario had limited work in the Canada market in 2022-23 due to budget constraints. However, travel intention research and search data indicate an opportunity with the Canadian market, particularly Atlantic Canada.

To better connect and learn about the Atlantic audience, Destination Ontario launched a digital campaign to test image, copy and content options to learn what performs best to encourage action. The goal was to connect Atlantic Canada consumers with Ontario planning content with a strong time spent with articles.

With an investment of $50K in media pilot, search marketing strategies and content, Destination Ontario generated 188.4K content views and 314 leads to partners from Canadian markets. Atlantic Canada specifically is interested in trip ideas in Toronto and Ottawa, engaging on average 3-minute time spent per article.

**U.S. MARKET**

After more than two years of being absent from the US market, Destination Ontario and its gateway city partners looked to return together to this important market. With cautious optimism and a competitive landscape, Team Ontario had the opportunity to welcome back American road trippers while recognizing the difficult task of encouraging travellers to make Ontario their destination of choice.

The goals of the campaign were to:

- Build a positive impression of Ontario as a desirable destination
- Prospect high value and interest travellers to partner content

**US MARKET PLAN – SPRING DRIVE CAMPAIGN**

Destination Ontario launched a spring drive campaign to encourage high value travellers from border states of Michigan, Ohio and New York State. This plan is anchored by gateway city partners' destination content.

The media strategy had two primary media pillars. The first is destination awareness which focused on high reach media channels to help build a positive impression of Ontario as a desirable travel destination. The second is prospecting high value travellers to partner destination content. For this campaign, there were four partners participating. Partners contributed $800K to the campaign media spend.

The campaign targeted high value travellers, adults aged 25 – 55 geo-fenced around key cities and high value postal codes. The media tactics were Connected TV, digital video, social, display and Destination Ontario planning content running from May 9 – July 17, 2022. With a media investment of $3M, Destination Ontario was able to generate 160.7K incremental visitors and $102.5M in incremental expenditures resulting in an ROI of $1: $30.84. Additionally, the campaign generated 25.7M completed video views and 2.2M leads to partners. The ad tracking study showed that 14% of all respondents think of Ontario when asked about destinations for short getaways (unaided awareness), 62% of all respondents said the campaign influenced their decision to take a trip to Ontario, 75% of the respondents said the campaign gave them a reason to travel in Ontario and 31% of respondents said they would be extremely/very likely to visit or return to Ontario.

**US MARKET PLAN – FALL DRIVE CAMPAIGN**

Destination Ontario extended the campaign into the fall with the support and encouragement of participating partners. The campaign focused on a fall drive campaign to encourage high value travellers from border states of Michigan, Ohio and New York State. This plan was also anchored by gateway city partners' destination content.

The media strategy remained consistent with the spring campaign with a focus on applying the spring media and creative learnings. For this campaign, there were four partners participating. Partners contributed $150,000 to the campaign media spend.

The campaign targeted high value travellers; adults aged 25 – 55, geo-fenced around key cities. The media tactics were digital video, social, content creators and Destination Ontario planning content running from August 15 – September 25, 2022. With a media investment of $1.15M, Destination Ontario was able to generate 64.8K incremental visitors and $37.2M in incremental expenditures resulting in an ROI of $1: $24.46. Additionally, the campaign generated 1.2M leads to partners. The ad tracking study

showed that 49% of all respondents are planning to make any trip (overnight or day) to Ontario in the next 12 months – a 4% lift post campaign, 27% of all respondents recalled seeing any of the campaign ads, 29% of all respondents searched for information on Ontario travel in the past month – a 10% lift in search post campaign and 76% of respondents who made overnight trips to Ontario said the campaign significantly or somewhat influenced their decision to travel.

## SOCIAL STRATEGY

Throughout 2021-22, Destination Ontario worked to inspire travellers with content aligned with public health guidelines and support and amplify industry priorities.

Social media is an essential tool of Destination Ontario's integrated marketing strategy. Social platforms connect the agency with customers, increase awareness about the brand, and boost leads to partners or trip-planning content.

A key performance measure for Destination Ontario's social strategy is the impact on audience growth and engagement. In 2022-23, Destination Ontario was able to grow its audience by 87.4K followers or 7.7%. Almost 500K consumers shared, saved, liked or amplified Destination Ontario's social channel content. Destination Ontario continues to engage with consumers as part of the customer care model, answering questions and providing travel advice through social channels with over 32K inbound messages to Destination Ontario's social accounts.

The content creator program was back in action in 2022-23, with Destination Ontario working with 12 creators over summer, fall and winter in both Ontario and the U.S. The creators developed approximately 60 custom pieces of content telling the story of product-focused Ontario experiences aligned with the Ontario Market Plan. Destination Ontario saw a year-end total of 1.2M video views (paid + organic) and 600K thru-plays. The sentiment on all posts 22-23 creator campaign posts was overwhelmingly positive, with above benchmark shares (8K total paid + organic) of the video units - typical shares for Instagram post are 25-100 shares. From a key outcome perspective, Destination Ontario's fan base grew while whitelisted content was live on creator channels with a 119% increase in growth on Instagram as compared to the fan growth two weeks prior to being in market.

Destination Ontario's social channels are also an important opportunity to extend and amplify partner content and priorities. In 2022-23, Destination Ontario's shared or created almost 1,000 posts featuring partner content. These posts generated 27K leads to partners generated by organic and in-house paid partner posts.

## NORTHERN MARKETING AND PARTNERSHIPS

Destination Ontario has a specific focus on increasing visitation to Northern Ontario and works with Northern tourism partners (RTOs 13 and 12, DMOs, sector associations and individual tourism operators) to market the North's unique experiences and natural landscapes. While the North as a destination is promoted and integrated across all the

agency's work, avid experiences such as powersports and touring, angling and hunting, and outdoor adventure are of particular importance and focus.

## ANGLING AND HUNTING PROGRAM

### Avid Angling and Hunting Media Program

Destination Ontario's Angling and Hunting program leveraged leading angling and hunting influencers in Ontario and the U.S. to ensure Ontario was kept top-of-mind for future avid travel. The program generated 40 television shows featuring 63 lodge and resort properties. Tracking is ongoing with the first 14 lodges reporting $415K in business, additional reporting of revenue should be complete by mid-2023; each show will be aired a minimum of twice before going into a re-run format and then posted online. The remaining shows and second airings will continue to generate further sales into the new year.

For the third year, Destination Ontario incorporated all the television media reporting on social media traffic based on posts driving to Ontario operators, to DestinationOntario.com and to the partner-collaborated dedicated northern content website – NorthernOntario.travel. This program resulted in 487 Instagram posts with 2.6M impressions and 79K engagements and 958 Facebook posts with 10M impressions and 2M engagements.

On NorthernOntario.travel, 54 new angling articles were posted which resulted in 231K sessions, 251K page views and 26K leads to partners. The hunting portal had four new stories developed and uploaded 64K sessions, 71K page views and 10K outbound links. Overall, numbers were down for both the angling and hunting sub-portal likely due to the increase in domestic interest during the time that Ontarians stayed closer to home during the pandemic. However, the leads to partners are up for both sub-portals which is an important key performance indicator.

Destination Ontario continued supporting the GoFish and GoHunt Facebook pages. The fishing page had 601 posts, 1.2M in reach, 10K in leads to partners. For the hunting page, there were 263 posts, a reach of 139K, engagement of 2K – up 47% and 2K in leads. Although Facebook numbers dipped in some areas, numbers have readjusted to pre-pandemic traditional traffic. Lead numbers remained strong particularly for angling.

### Family Fishing Spring Campaign

As traditional avid anglers are slowly aging out of the sport, Destination Ontario has implemented a new marketing program to help contribute to ensuring the sustainability of the angling industry in Ontario. The new program is focused on promoting family travel activities anchored at fishing lodges and resorts. Destination Ontario partnered with Destination Northern Ontario (DNO) to run the campaign. DNO contributed $20K into the media investment. Key results for this program included 45M impressions, a cost per click of $.17 and 734K in leads to partners.

### Avid Angling Campaign

Destination Ontario continued to build on the success of this program from the last two years. In 2022-23, Destination Ontario secured financial partnerships with Sunset Country, Superior Country, Northeastern Ontario Tourism and Destination Northern Ontario (RTO13) which increased the overall budget of the program significantly. The marketing program drove directly to the sub-regional partner websites which showcased lodges and operators in respective catchment areas. This campaign targeted the avid gear angler in Southern Ontario, Michigan, Ohio, Minnesota, Illinois and Wisconsin. The targeted demographic was adults 35-65 with an affinity for angling and hunting. The media buy included video, discovery ads, social video and traffic driving ads from January to mid-April 2023.

The campaign's $318,000 media investment resulted in 80M impressions, a cost-per-click of $0.17, and 1.7M leads to our partner website – overdelivering on the target by 59%. This program had four partners contributing $85K in media investment.

**Fly Fishing Campaign:**
Fly fishing is a niche angling product that saw a surge of interest during COVID-19. This sport is heavily skills-based, and the anglers tend to be much younger than the traditional avid gear angler. Destination Ontario targeted fly anglers to travel North during the fall shoulder season – the ideal time of year for fish to be feeding at the surface to the water. Target markets included Southern Ontario, targeting 35 – 64-year-olds in both French and English. Destination Ontario prioritized urban centres with active fly fishing clubs.

This program was in-market from mid-August, leveraging 15-second video, social and digital ads driving to Destination Ontario's content and direct to partners. Results for this program included 26M impressions, 3.3M completed videos views, an 87% video completion rate and 117K leads to partners.

**POWERSPORTS AND TOURING PROGRAM**
**Snowmobile Campaign**
Destination Ontario and the Ontario Federation of Snowmobile Clubs collaborated on a campaign to encourage snowmobilers to book a snowmobile vacation during the winter 2022-23. Data shows a large influx of new riders purchasing snowmobiles over the last few years, but with a limited ability to ride beyond their local community. With more than 30,000 km of snowmobile trails across Ontario and over 30 snow tours available to ride, it was an opportunity to get riders touring Ontario Trails.

Marketing objectives focussed on Ontario and border U.S. snowmobilers to plan a trip away from home this winter. The campaign encouraged riders to book a trip in Northern Ontario using digital video, digital and social traffic driving ads, and digital display and ran from mid-October to February 2023. With a media investment of $332K, Destination Ontario was able to generate over 78M impressions, 1.26M pageviews to the content landing pages and 44K leads directly to the snowmobile permit purchase page driving.

**Avid Powersports and Touring Display Ad Campaign**
Destination Ontario works with a few niche online media outlets to target powersports avid enthusiasts (snowmobiling, motorcycling, RVing, boating and ATVing). The display and content partnership generated 14 new powersports stories on these highly read media sites, 7.2M impressions, 56,000 pageviews with a click-through rate of 0.16% and an additional 11.8K clicks to Destination Ontario content.

**Avid Powersports and Touring Content Acquisition and Distribution**
Destination Ontario's Powersports Touring program represents motorcycle, snowmobile, all-terrain vehicles (ATV), boating and recreational vehicle (RV) touring. This program has successfully focused on the development of online content and social engagement. In 2022-23, 57 stories were published (on NorthernOntario.travel), and 65 resource articles were updated, resulting in 1.3M page views to the powersports areas on the Northern website (boat, RV, motorcycle, snowmobile, and ATV sub-portals), and 1.8M page and profile reach on social media with an engagement rate of 3%. The output of these visits resulted in 180K leads to partners – a conversion rate of 14%. Snowmobiling was the most successful sub-portal up 172% views year over year.

Nine media and influencer and content acquisition familiarization tours (FAMs) took place, and nine partnered cooperative media FAM tours were completed with 12 partners, including RTOs, DMOs and operators. The reach of all campaign elements was an audience of over 2M riders with social engagement of over 120K, with over 400K digital video views (and counting), and over 170K readers of content generating 8.5K leads from the content.

**Outdoor Adventure Program**
The Outdoor Adventure program effectively promoted fully outfitted, guided and/or lodge-based paddling, bicycling and trail experiences through a content-based strategy. Through the development of quality content, social media channels, an influencer program, and Ontario product tours, Destination Ontario targeted consumers that will grow visitor volume and expenditures from priority markets.

Through Destination Ontario campaigns, the program generated results in qualified leads focused on overnight guided, fully outfitted and/or lodge-based adventures. Further, the program generated leads directly to Destination Ontario, partners and/or operator websites, phone enquiries, use of trip planning tools, and other channels that demonstrated an intent to book in the future.

**Ontario Market Plan – Seasonal Northern Outdoor Collaboration**
To complement the overall Ontario Market Plan, the outdoor adventure program was part of the seasonal Ontario market campaigns.

Integrated into the Ontario Market Plan, Northern Outdoor Content was featured through digital channels in spring/summer, fall and winter spotlights, which resulted in 34.6M impressions, 38.5K direct to partner leads and 33K external story clicks (leads to

partners). Each season featured a mix of articles located on the Northern Ontario Travel, as well as direct to operator/experience ads. Ads and stories were chosen to highlight avid outdoor experiences across Northern Ontario.

**U.S. Paddling Campaign**
Destination Ontario invited U.S. paddlers to visit Ontario to experience the premier paddling destinations Ontario has to offer. This campaign drove awareness and encouraged U.S. avid paddlers to book their paddling adventure in Ontario.

Building on the paddling campaign from 2022, the campaign expanded to include cycling in 2023 due to its organic growth in popularity in 2022. A mix of prospecting and awareness ads were promoted to a U.S. audience from mid-February to mid-March, 2023, which resulted in 51.8M impressions, 3M completed video views, 957K ad clicks, 1M page views and over 4K leads to partners. The program will build on the prospecting components of the campaign to look to increase direct leads to partners for the 2024 campaign.

**Outdoor Adventure Content Development**
On NorthernOntario.travel, the outdoor adventures, paddling, and bicycling pages published 21 resource articles, 36 new story articles, as well as updating 45 top-performing articles and writing five new articles for DestinationOntario.com. The outdoor sub-portal on NorthernOntario.travel had over 1.9M page visits. These results generated an output of over 164K leads to operators, which is a decrease from the 185K leads in 2021-22. The decrease is due to an irregular increase in 2020-21 related to the interest in getting outdoors, likely due to the ongoing restrictions and lockdowns during that time.

The outdoor adventure page on NorthernOntario.travel performed well, resulting in 658K views (an increase of 70% year over year). The output of these pageviews resulted in an outcome of 109K leads to partners. Due to the natural increase in cycling views, the paddling campaign was expanded to include cycling in the U.S. Outdoor campaign, which has shown to have transformed into a substantial increase in pageviews and leads. The bicycling subpage had 581K views (an increase of 1743%) and 32.1K leads (an increase of 205%). The paddling page also saw a light increase with 691K views (11% increase), with 58.3K leads (18% increase).

**Outdoor Adventure FAM Program**
The outdoor program completed eight FAMS / Influencer programs which spanned across RTO 12 and 13 and included a variety of avid outdoor experiences such as mountain biking with World Champion Emily Batty in North Bay, nature tours in Moosonee, paddling along Lake Superior, and hosting PinkBike in Sault Ste Marie.

**Northern Portal (NorthernOntario.travel) and Social Content Development**
Building on the success of its partnership, Destination Ontario in collaboration with DNO and industry partners, increased awareness of Northern Ontario as a travel destination, through the development of angling and hunting, powersports and touring, and outdoor

adventure content for the website and social media channels. This included editing all content received and creating new content that supported consumers booking directly with an operator via links in stories that drive directly to operator experiences.

**Media/Influencer Familiarization (Fam) Tours**
In partnership with industry, Destination Ontario worked with approved media partners to tell the stories of the angling and hunting, powersports and touring, and outdoor adventure products in Ontario, specifically in the North. Each fam tour resulted in shared assets that may include photography and/or video for future usage by Destination Ontario. Destination Ontario was able to support 20 fam tours across all programs in 2022-23.

**Consumer Shows**
Destination Ontario returned to the Toronto Sportsman Show this year with strong integrated Northern Ontario brand presence. The booth attracted many of the 40K people (an increase of 20% from the previous year) that attended the show, and who were able to engage with team members from Destination Ontario, Algoma Country and Northeastern Ontario Tourism. Throughout the four-day marathon show interest was extremely high with most conversations being all about lodges, resorts and fish species locations. Fulfillment pieces include 17 cases of Ministry of Natural Resources Fishing Regulations, 950 Algoma guides, 300 Sunset Country guides and 1,120 Northeastern Ontario guides, as well as 400 Ontario Road maps and 400 angling and hunting postcards. In addition, Destination Ontario had various fishing and hunting personalities in the booth, swapping fishing and hunting stories with their fans.

At the Green Bay All Canada Shows, Superior Country Tourism staff took the lead, with the help of Jim Saric star of the Musky Hunter. Guides were popular amongst consumers with 680 Superior Country guides distributed along with 450 Sunset Country, 200 Algoma Country and 160 Northeastern Ontario guides, plus 200 Ontario postcards that drive consumer to the angling pages on DestinationOntario.com. While the number of attendees were not released by the show, the booth was busy throughout the duration of the show.

The powersports program in partnership with 21 DMOs across the province, attended the Toronto Powersport Show in October 2022 and the Toronto Motorcycle Super Show in January 2023. Both shows reported great attendance by riders. (Official number not disclosed).

Destination Ontario also helped support #NEONTARIO and Ontario by Bike with their presence at the Outdoor Adventure Show in February 2023, where both partners viewed the show as a great success and had a lot of interest at their booths. Ontario By Bike also attended the Montreal Bike Show in February 2023 and continued to re-engage with the cycling community and encourage Ontario travel.

**Group of Seven**
Ontario has a very distinct relationship with the Group of Seven. The group is one of Canada's greatest art collectives. Destination Ontario partnered with DNO and Northeastern Ontario Tourism, Sudbury Tourism, Algoma Country, Tourism Sault Ste. Marie, and the McMichael Canadian Art Collection, on a spring Group of Seven campaign. This campaign connected the art consumers see on the wall in galleries to the actual landscapes that inspired the art.

The program targeted adult couples that are culturally motivated or enjoy learning while experiencing nature. This campaign targeted a domestic traveller for the summer of 2022 and was in-market from the beginning of June to mid-July 2022. Results included 2.5M completed video views, 157K leads to partners with 241K sessions on partner sites, and 86K sessions on the Group of Seven itineraries on DO's website.

**Pan-Northern Partnered Campaign – Spring Campaign**
Destination Ontario executed the final part of the Pan-Northern Campaign in spring 2022. The campaign was a collaboration between Destination Ontario, Destination Northern Ontario and the northern regional DMOs, in support of the ongoing recovery of tourism in Northern Ontario, built on the success of our pivot to domestic marketing over the previous two years and shifted attention back to the vitally important U.S. market. In addition to a return to key U.S. markets to promote avid experiences, this campaign focused on U.S. leisure travelers who remain an opportunity for future growth.
The marketing objectives were to raise awareness and consideration of Northern Ontario travel experiences (nature-based, lodge-based and urban) among families with older children (12 years+) in key U.S. border state designated marketing areas and to motivate planning a pleasure trip to Northern Ontario in summer 2022.

There were 12 partners in the program contributing $110K into the media investment. The campaign media buy included digital and social video, sponsored content and traffic driving ads. With a total media investment of $520K, Destination Ontario was able to generate over 47K completed video views, 65K sponsored article views on USA Today, and 347K direct leads to partners.

**Northern Partnered Projects**
Destination Ontario worked with Northern partners to deliver seven partnered project campaigns to support development and marketing activities. Overall, Destination Ontario invested $640K, and partners invested $1.37M for a total collaborative marketing spend of over $2M.

**Technology, Data and Insights**
The following is a summary of the strategic planning, market research, data analysis and insights initiatives that were undertaken in 2022-23 by the Data and Insights team.

This work strives to help better Destination Ontario's knowledge, strategic and business planning and evaluation of our investments. The team also works to support the industry

with helpful information to support our collective business objectives for strong research and strong outcomes.

**WEBSITE REPORTING AND OPERATIONS**

Destination Ontario launched its new consumer and corporate beta website in May 2021. This major project brought the website in-house to the organization with a first-ever in-house team of developers. In the fiscal year 2022-23, user interface validation and incremental search ranking gains were prioritized.

In order to do this, Destination Ontario overhauled and optimized its complete consumer content catalogue for search and usability. 267 content pieces were either refreshed or newly added to the website.

Additionally, Destination Ontario conducted a technical search engine optimization (SEO) audit and deployed multiple structural enhancements to improve site health. The insights unit developed auto-populated content dashboards to analyze onsite performance. From July 2022 to March 2023, Destination Ontario increased the website's organic ranking keywords by 55%.

To improve the visitor experience, Destination Ontario conducted user experience testing on sitewide components to inform new interface improvements for 2024-25. Destination Ontario also kept a focus on accessibility performing user testing with visitors who relied on assistive devices, ensuring non-visible navigation was more user-friendly. As a result of various user experience improvements, Destination Ontario has seen web sessions increase by 24% YOY and our annual time on page for organic visits come in 142% higher than paid.

The delivery of a refreshed consumer, corporate and image website provides a meaningful web experience by employing a content strategy that focuses on search optimization, user journey and consumer insights and performance data. Insourcing allows for full control and agility to adapt and deliver content relevancy to visitors. The websites also align with the Government of Ontario's commitment to being digital-first and its Digital Service Standard and international legislation considerations like the General Data Protection Regulation (GDPR) in the U.K.

The website continues to be a reliable source of non-paid leads for tourism partners and operators with 2.6 million organic views and delivering over 617K leads in 2022-23.

Destination Ontario continued to build on the success of taking ownership over its own marketing and technology stack, with 2022-23's focus being on data automation, where Destination Ontario successfully streamlined core data-related processes, eliminating manual tasks, which reduced errors and increasing unit efficiency.

From a human resources standpoint, replacing more typical coordinator or generalist roles with specialist roles has also resulted in additional cost-avoidance. In 2022-23, Destination Ontario teams in both web content and data and insights analysis and measurement avoided $399,030.52 in costs that would have been paid to an external

vendor or agency. The in-house specialists allow for sustainability in data collection, measurement and consistency, alignment to corporate vision and goals, and increase competitiveness with strong internal knowledge of business needs and programs.

## RESEARCH AND DATA

Destination Ontario had a dual focus in 2022-23 as it relates to research and data. The first was a testing strategy for marketing campaigns with the aim of optimizing marketing efforts, maximizing return on investment, and better understanding target markets.

The internal performance team conducted three experiments testing campaign elements, such as messaging, imagery, call-to-action prompts, and channel selection. Testing allowed Destination Ontario to allocate its marketing budget more effectively, ensuring that resources are invested in the most cost-effective components of a campaign. In all instances, this led to higher conversion rates and lower acquisition costs with the learnings repeatable on future campaigns. In some cases, the results were shared with partners and operators who replicated the optimizations within their own marketing campaigns, further extending the benefit. The results allowed the organization to create benchmarks for specific campaign types and channels, which can be used to identify areas of improvement going forward.

The second objective was to develop an actionable research program that focused on helping Destination Ontario and its partners and operators make informed decisions and tailor their marketing efforts to meet the needs of their target audiences. The program provided both insights as well as performance measures.

The following research products and reports were produced in 2022/23.

### Marketing Campaign Reports

Data Studio, Google's data visualization tools, allows for real-time and weekly updated performance dashboards and visualizations to monitor campaign progress and identify opportunities for mid-campaign media and web optimizations. It creates tailored campaign reporting for external stakeholders and partners aligned to partnered campaigns, along with a visualization of executive reporting on organizational priorities and program areas. 22 dashboards were produced, including 67 partner dashboards.

### COVID-19 Consumer Behaviour Reports

From April to December, the team gathered data from leading research and industry firms such as Ipsos, Tourism Economics, and the Conference Board of Canada to be developed into detailed insights reports as the situation continued to evolve. This important information was shared with stakeholders as an ongoing pulse and insights into perceptions and consumer insights about the COVID-19 pandemic.

### Ontario Market – Fall Campaign Ad Tracking

Destination Ontario launched its fall campaign to raise awareness and build domestic consideration of Ontario as a travel destination by encouraging Ontarians to "Rediscover the World of Ontario" as pandemic restrictions eased. The broad objectives

of this survey are to measure recall and perceptions of the campaign and its impact on ROI and determine any lift in Ontarian's overnight travel intentions as a result of the campaign.

The study found the following key takeaways from the fall campaign, 85% of all respondents are planning to make overnight pleasure trips within Ontario in the next 12 months – a lift of 8% post campaign, 71% of all respondents think of Ontario in total when asked about destinations for short getaways – remained stable pre/post campaign. There were 33% of respondents searched for Ontario travel information – up 6% post campaign and 33% of all respondents recalled and understood campaign messages – up 6% post campaign.

Northern U.S. Summer Campaign Ad Tracking Study

Destination Ontario, in partnership with Destination Northern Ontario (RTO 13), launched a campaign to raise awareness and build domestic consideration of Northern Ontario as a summer travel destination by promoting experiences for leisure and avid travellers (families, couples and groups of friends). The broad objectives of this survey were to measure recall and perceptions of the Northern summer campaign and visits to and perceptions of Northern Ontario from select U.S. markets.

The study found the following key takeaways from the summer campaign, 36% of all respondents are planning to take overnight pleasure trips to Northern Ontario in the next 12 months, and 61% of all respondents searched for information on Northern Ontario.

Audience Research by Tourism Product

Destination Ontario in partnership with Environics Analytics in fall 2022 analyzed mobility data from consumers over two years ending 2020, for 136 Points of Interest locations across 16 Ontario tourism product categories. The report was designed to help Ontario tourism operators and partners with: Geotargeting, identifying the platforms and advertising channels to reach that audience, and understanding the location, behaviours, and life stage information for optimizing your advertising campaigns to the right target audience.

2022 Research Report: Ontario, Canada and U.S. Consumer Travel Intention and Motivator Surveys

Three survey reports were commissioned by Destination Ontario and prepared by Forum Research in Spring 2022, (1) Ontario province-wide, (2) the Rest of Canada's select provinces and (3) U.S. select states online panel surveys with a random sample size of 1,500, 2,100 and 3,000, respectively. The reports drill down into the "travel within/to Ontario" market and summarizes the behaviour of consumer segments that are planning to a trip within/to Ontario and types of activities they are interested in.

## CREATIVE SERVICES

Creative Services works in collaboration with industry partners to capture Ontario travel product and experiences, and to enhance Destination Ontario's collective ability to promote the province through stunning video and photography. The work of this team is

all in-house to Destination Ontario and therefore provides both expertise and the value-added benefit of efficient use of resources.

Through the Destination Ontario Media Hub (DestinationOntario.com/image), the organization offers an image distribution library with a collection base of more than 5,600 high quality images and b-roll clips from all over the province. Destination Ontario utilizes Crowdriff as the digital asset management system, which allows for cross functional sharing of assets both within the organization and throughout the province with industry partners. In 2022-23, the Marketing and Creative Services team restructured the media hub asset management process to make assets, video and talents rights clearer and easier to use. The new process resulted in expediting a number of shoots into the system. In 2022-23, the team added assets from twelve photo and video shoots resulting in 1,200 assets. This work is a result of partnerships with seven DMOs across the province.

The Creative Services team also produced a large number of dynamic creative pieces, including digital videos, banners and social content for the seasonal Ontario market campaigns, all Northern campaigns (avid angling, family fishing, Group of Seven, fly fishing, snowmobiling, paddling and cycling) and international market creative needs including events, Rendezvous Canada, content partnerships with National Geographic and in-market tour operator promotions. Additionally, the in-house team produced creative and materials for the Ontario Travel Information Services team, including branding for tricycles and pop-up tents, postcards and other signage materials and requirements for the centres. The in-house team is critical to effective and efficient production support across all business lines. It is estimated that the in-house team provided at least $150K in creative and production cost avoidance that Destination Ontario would have paid a creative agency.

Additionally, the Creative Services team created, tested and rolled out an updated Visual Identity Guide for the consumer brand as an evergreen tool. The new guide includes updated font with flexibility across markets, colours palettes with consideration of international market nuances and sizing, specs and shooting guidelines for work with content creators, photographers and videographers. Destination Ontario is currently refreshing its brand positioning, and the visual identity guide will continue to evolve as the brand does. Staff training and adherence will begin in the new fiscal year with the brand work.

The team continues to build the collection of visual assets through photo/video shoots around the province. All shoots are completed in cooperation with RTOs, DMOs and sector associations. Creative Services also maintains regular communication with tourism partners to acquire visual assets that partners are producing to fill any asset gaps in the Media Hub platform.

## INDUSTRY RELATIONS, INTERNATIONAL MARKETING and MEDIA RELATIONS

### Industry Relations

Destination Ontario collaborated with stakeholders from across the tourism industry to increase tourism visitation and spend in Ontario. In 2022-23, Destination Ontario engaged with partners across several opportunities, through Destination Ontario-led programs, as well as partner-led programs. All partnerships leveraged resources and investments with the goal of supporting stakeholders and growing tourism in Ontario.

The Industry Relations team supported program areas of the organization by bringing partners from across Ontario to learn about and find opportunities for collaboration, whether it was through marketing opportunities, broadcast partnerships, creative service partnerships, northern partnerships, media relations or travel information services.

Staying connected with partners across the province also remained a priority for the Industry Relations team, and vitally important as the stakeholders began to shift back to in-person events. Staff attended a broad range of events to maintain and strengthen relationships, stay up to date on products and experiences, share information about Destination Ontario programs and activities, and discuss ways to support industry stakeholders. Meetings and events included:

- Ontario Tourism Summit
- Northern Ontario Tourism Summit
- RTO, DMO and Sector Association annual general meetings, conferences, and industry events.

Throughout the year, the Industry Relations team endeavoured to stay abreast of stakeholder content to ensure that Destination Ontario's marketing efforts are focussed on the industry's latest and greatest offerings. A key outreach was monthly reminders for the on-going 'AlwaysON' content intake form. The team also held learning sessions, as well as regular meetings and engagement opportunities and distributed key information to other areas of the organization. Additionally, Destination Ontario shared regular 'Industry Health Check Reports' to help support the industry in their business decisions.

**Key Partnerships**

Destination Ontario continued to partner with Festivals and Events Ontario (FEO), Attractions Ontario (AO), Resorts of Ontario (ROO), and the Tourism Industry Association of Ontario (TIAO) to support these organizations in their own marketing activities and programs and provided investments that in turn will benefit the tourism businesses that these organizations serve.

**MICHELIN Guide**

2022 brought an exciting new initiative to Ontario with the first-ever Canadian MICHELIN Guide being released in Toronto. Two key events took place with the press conference in May 2022 announcing the arrival of the guide, followed by the MICHELIN Star Reveal event in September 2022.

It was an exciting venture that Destination Ontario entered with Destination Canada and Destination Toronto, with Destination Toronto leading the initiative with the MICHELIN

Guide team. This partnership was underway prior to COVID-19 and was paused, understandably, due to the impact that the pandemic had on the culinary industry. The launch of the MICHELIN Guide Toronto was a positive step toward rejuvenating and celebrating the renowned and diverse culinary scene that Toronto offers.

The first edition of the MICHELIN Guide Toronto was announced at the MICHELIN Star Reveal event and included 74 total restaurants with 27 different culinary types. Of those, 12 restaurants received one MICHELIN Star, and one restaurant received two MICHELIN Stars. The selection also included 17 Bib Gourmand distinctions, plus three special awards, a Service Award, Sommelier Award and a Cocktail award.

The global reach of social and press coverage for the MICHELIN Guide in Toronto was immensely successful and included a combined reach to 573 million people, with 884 articles, an earned media coverage of $600K and social interaction of 90K.

Future editions of the MICHELIN Guide Toronto are planned and are expected to continue to bring positive awareness of and drive revenue for culinary businesses and tourism in Ontario.

**Indigenous Tourism Ontario**
In October 2022, Destination Ontario and Indigenous Tourism Ontario (ITO) entered into a Memorandum of Understanding (MOU) to further solidify the collaborative relationship that already existed between the organizations. The MOU outlines specific areas for communication, marketing, and mentorship collaboration, with a goal to strengthen the Indigenous tourism industry across Ontario.

Through the MOU, Destination Ontario committed specific investments to support ITO's marketing efforts and dedicated in-house support that will focus on the development of marketing assets and promotion of Indigenous tourism products and experiences.

The MOU will be in place until March 31, 2024, at which time the MOU will be reviewed for new goals and objectives.

**Partnerships with the Ministry of Tourism, Culture and Sport and Government Agencies**
Destination Ontario collaborated with the following MTCS and government agencies to help support joint tourism efforts:

- The Destination Ontario content team worked with other areas within the organization and directly with agency partners to find out about agency experiences and products, ask questions and fact-check information regarding content and images for DestinationOntario.com.
- Destination Ontario's social media team regularly highlighted and generated engagement of agency attractions and experiences through its network of social channels.
- Destination Ontario's Broadcast Program promoted seven sister agencies and attractions during 15 broadcasts, garnering positive media coverage on television

and radio in the Canada and U.S. markets. Agencies and attractions promoted included: Niagara Parks, Royal Botanical Gardens, Fort William Historical Park, Ontario Parks, Huronia Historical Parks, Science North, and Ontario Place.

- Through the Ontario Travel Information Services team, roaming services were provided during the summer months at a St. Lawrence Parks Commission attraction, Kingston Penitentiary. The Niagara Parks Commission also partnered with Destination Ontario for a ticket sales opportunity.
- Ontario Heritage Trust: Through the final year of a three-year partnership, Destination Ontario supported the Doors Open Ontario program that invited community event organizers to share content, virtual experiences and tours. Destination Ontario also leveraged and promoted the event on its own social channels and content activities.
- Ontario Parks: Amplified social media messaging from Ontario parks, enforcing key messaging around offerings, camping etiquette and campsite availability.

**Destination Ontario Presents**

To support the Ontario tourism industry Destination Ontario delivered "Destination Ontario Presents: …" – a series of informational webinars for industry partners, including RTOs, DMOs, sector associations, sister agencies and operators, and MTCS regional staff.

The series aims to cover a diverse range of topics, leveraging Destination Ontario's business relationships and in-house marketing expertise to share knowledge with the tourism industry. In 2022-23, Destination Ontario delivered insights and learnings through the Destination Ontario Presents webinars to over 500 registrants.

**INTERNATIONAL MARKETING**

Although the pandemic has had a significant impact on international travel, international travellers remain a high-yield segment for Ontario's tourism industry as travel recovers. The global landscape is competitive; with the support of in-market representatives in the U.K., Germany, Japan and China, Destination Ontario used an integrated approach to inspire the global traveller and convert interest into travel bookings:

1. Business Development – Working closely with travel companies (tour operators, wholesalers, and travel agents) to increase awareness of the province and drive sales of Ontario's market-ready tourism products and experiences.

2. Media and Public Relations – Working closely with media (journalists, editors and influencers) to garner positive third-party editorial coverage to increase awareness of the province and inspire travel to Ontario

3. Consumer Marketing – Promoting Ontario directly to consumers through digital and social tactics to drive awareness, consideration and travel intent for Ontario

The 2022-23 international markets of priority were the U.K., Germany, France, Japan, China, South Korea, Mexico, and Australia.

Destination Ontario works in partnership with Destination Canada to leverage the global recognition of the Canada brand and Destination Canada's significant investments and resources in key markets internationally while ensuring that Ontario is recognized as a renowned travel destination within Canada.

**Business Development**

Destination Ontario worked with the travel trade, including tour operators and travel planners who focus on packaging, promoting and selling leisure travel to escorted groups and individual travellers. As the year progressed, travel restrictions were eliminated for all priority markets (with the exception of China), allowing Destination Ontario to resume traditional tactics, in addition to maintaining key relationships, monitoring industry changes, planning recovery strategies, and supporting key DMOs.

Rendez-vous Canada (RVC) 2022 was a hybrid format with the in-person component taking place in Toronto. Canada's annual international tourism marketplace, led by Destination Canada and the Tourism Industry Association of Canada, is a forum through which international travel companies connect with Canada's trade-ready tourism industry partners through a series of business meetings, educational sessions, and networking opportunities.

As always, Destination Ontario ensured a strong presence for Ontario by conducting over 300 meetings with international travel companies, such as tour operators, airlines, and receptive tour operators to help inform and advance recovery strategies in order to rebuild visitation and expenditures to Ontario, including current market intelligence, travel trends, product updates and potential promotions through trade channels.

In addition to RVC, Destination Ontario participated in a number of tradeshows to ensure a strong presence for Ontario and keep the province top-of-mind. Examples included:

- Canada: Bienvenue Quebec
- U.S.: United States Tour Operators Association Annual tradeshow (USTOA)
- U.K., Germany and France: Showcase Canada (DC lead)
- Mexico: Focus Canada (DC lead)
- China: Virtuoso Connects (in-market representative participated).

<u>Joint Marketing Initiatives</u>

Joint marketing initiatives (JMAs) with targeted travel companies also resumed across most of our priority markets, resulting in an additional 14.4K trips to Ontario being directly booked with trade company partners, generating over $24.5M in estimated incremental expenditures in Ontario. There were also 28 new products developed as a result of the JMAs. Examples include:

- A joint marketing promotion with a key Mexican travel company highlighted four winter itineraries that focused on Toronto and Niagara Falls. The promotion was executed through a variety of tactics, including digital marketing and e-newsletters. Destination Ontario's $5K investment was matched by the tour operator, resulting in 192 passengers booked, with estimated expenditures of more than $147K.
- A joint marketing promotion with a key U.K. travel company added 25 new sightseeing experiences, 7 new hotels and 2 new tours to an already robust program in Ontario as a direct result of Destination Ontario's investment. The promotion included radio advertising, digital advertising on high traffic lifestyle and news websites, social media posts, e-newsletters to their database, in-store window displays in retail agencies and magazine advertorials. In partnership with Destination Toronto, Destination Ontario invested $20K, which the tour operator matched; the promotion resulted in 205 new passengers booked, which generated an estimated $509K in expenditures in Ontario.

Brand Partnerships

In Germany, Destination Ontario undertook a non-traditional partnership with Globetrotter, a 40-year-old outdoor clothing and equipment brand, with large retail stores and a strong online presence. Globetrotter has a loyal following, with approximately 5M customers per year. The multi-faceted campaign included a 5 week in-store activation in their flagship store in Munich and their busy Frankfurt location. Destination Ontario also had a 2-month promotion on their home page, and blog pages, along with a consumer trip contest, sponsored by a tour operator. Social media outreach, as well as digital promotion (newsletters to 460K customers), were also part of the promotion. Destination Ontario delivered a well-attended media and trade event, as well as a consumer event in Munich during the activation. Destination Ontario brought two Indigenous artists (Chuck Commanda, master birchbark canoe builder) and a storyteller (Christine Luckasavitch) along for the events, which were very popular with the media, trade and consumer.

FAM tours

Familiarization tours also resumed; Destination Ontario welcomed 139 travel trade on 19 fams from the U.K., Germany, France, Mexico, South Korea and Japan, as well as Quebec.

Training

Travel trade training continues to be a crucial method of increasing awareness among travel trade, which strengthens their ability to close the sale to consumers. Training is delivered in-person and virtually; more than 3.8K travel trade from our priority international markets were trained on Ontario products. Notably, over 150 Virtuoso travel advisors were trained by Destination Ontario, along with key DMO partners (Destination Toronto, Niagara Falls Tourism and Ottawa Tourism). In China, an innovative travel trade training series was delivered with virtual and in-person

components, garnering Destination Ontario an award for Top Ten Destination Innovative Marketing Case at China's annual National Tourism Awards in March 2023.

**Earned Media**
Destination Ontario continued to take a strategic and flexible approach to media relations activities based on market readiness factors such as the status of COVID-19, border restrictions, government policy, airline routes and consumer behaviour.

As the year progressed, travel restrictions were eliminated for all priority markets (with the exception of China), allowing Destination Ontario to resume traditional earned media activities like press trips and overseas events to keep Ontario top-of-mind as a beautiful and safe destination.

Highlights included media relations support for livestream and content partnerships on China's biggest digital platforms, and the launch of Destination Ontario Story Ideas – an e-newsletter targeted to domestic and U.S. media.

Monitoring the travel landscape and industry changes remains an ongoing part of Destination Ontario's recovery planning, along with important partnerships with Provincial Marketing Organizations, DMOs and Destination Canada. A contributing member of Destination Canada's Communications Working Group, Destination Ontario's earned media team collaborated on story telling, media pitches, themed content, creative assets, and media events to leverage the Canada brand and help Ontario stand out in today's extremely competitive market.

**Media Events**
Many events returned to an in-person format, and Destination Ontario participated in several to ensure a strong presence for Ontario. Highlights include:

- Travel Media Association of Canada (TMAC) Conference – In June 2022, Destination Ontario participated in the TMAC's annual conference in Yarmouth, Nova Scotia. The conference connects top Canadian travel/lifestyle media and travel destination/brands. It is comprised of networking sessions, professional development seminars, and the all-important one-to-one meeting appointment sessions. Destination Ontario met with 25 media.

- Canada Connect – In March 2022, Destination Ontario participated in Destination Canada's "Canada Connect" virtual media event. The virtual event provided an opportunity for Canadian provincial partners to connect with more than 75 editors, writers, freelancers and producers in the U.K., Germany, and France. Destination Ontario successfully pitched Ontario story ideas and in-person familiarization/press trip opportunities.

- Lieb Management Roadshow – in June 2022, Destination Ontario participated in the Lieb Management Roadshow, a media and trade event hosted in key German business hubs, Hamburg, Munich and Berlin. Organized by Destination Ontario's in-

market representation agency, the event is a cost-effective way to engage with the German travel trade and media, exclusively on behalf of its clients. Participation resulted in strengthened relationships with German media and the opportunity to pitch story ideas to over 50 media.

- Taste of Canada – Destination Canada, in partnership with top German culinary brand, Grillkonzept, hosted a “Taste of Canada” event on Canada Day. The event focused on Canadian culinary brands and traditions and highlighted partners including Heritage Canada, Canada Beef, Diamond Estates Winery, Pilletteri Estates Winery and more. Destination Ontario participated and had the opportunity to meet with over 50 culinary focused media for targeted pitching of Ontario wine and culinary stories.

- Showcase Canada – In November 2022, Destination Canada hosted its inaugural trade and media event for its three European markets. Hosted in London, U.K., Showcase Canada was a comprehensive trade and media event. Destination Ontario’s in-market representative attended the event and met with over 30 media

- Focus Canada – In November 2022, Destination Ontario participated in the biannual, Focus Canada – a comprehensive trade and media event hosted by lead partner, Destination Canada in Mexico City. Showcasing Canadian destinations, exclusively, to Mexican tour operators and media, Focus Canada is a comprehensive trade and media event organized by lead partner, Destination Canada in Mexico City. Destination Ontario met with 12 media to pitch story ideas and discuss ideas for collaboration.

- International Media Marketplace, North America – In January 2023, Destination Ontario attended this event connecting U.S. media and content creators with destination media relations representatives to exchange ideas for collaboration and pitch stories. Destination Ontario met with 25 media.

- International Media Marketplace, London – In March 2023, Destination Ontario attended this event connecting U.S. media and content creators with destination media relations representatives to exchange ideas for collaboration and pitch stories. Destination Ontario met with 45 media.

**Print and Digital**

Destination Ontario, with the support of in-market representatives, leveraged its strong relationships with print and digital media to ensure that Ontario remained top-of-mind through proactive pitches and responding to more than 120 queries from Canadian media alone.

Global earned media relations performance targets were exceeded, with an estimated Advertising Value Equivalency (AVE) of $56.2M. Achievements include:

- Travel and Leisure, China – Partnered with Travel & Leisure on the live-streaming event in Beijing. The event's theme, "Rediscovering Ontario's culinary scene with Michelin," leveraged the recently published Michelin Guide to Toronto to raise awareness of both Toronto and Ontario as culinary destinations. The event garnered more than 1M unique views, exceeding the original target of 230K.

- Agora Magazine, Japan – 10-page spread about Ontario in a special edition of Agora's November/December issue. The publication visited Ontario for shooting in August 2022.
  Reach: 850K, AVE: $137K

- Joong Ang Daily, S.Korea – Partnered with DC Korea, Joong Ang Daily and Lotte Tour to promote a new eight-day/six-night tour, crafted to meet the post-pandemic demands of Korean High Value Guests and position Eastern Canada as a premier destination.
  Reach: 1.8M, AVE: $129K

- Toronto Sun, Canada – Article on touring Sudbury and Manitoulin Island by car. Coverage was also picked up by the Winnipeg Herald, Calgary Sun, Canada.com, Edmonton Sun and Sudbury Star.
  Reach: 4M, AVE: $109K

- Mafengwo, China – content partnership with this leading social-travel and leisure platform in China with an enormous millennial travel community. A microsite dedicated to Ontario's four-season travel experiences as well as a series of off-line activities, were organized through the Mafengwo portal.
  Reach: 4M

- Travel & Leisure, U.S. – Destination Ontario's media relations team worked directly with a freelance writer to shape this feature destination profile in one of the U.S.' most widely read travel magazines

- Evening Standard, U.K. – Feature article on Niagara highlighting the Niagara Icewine Festival as a result of a group press trip in 2020.
  Reach 3.6M, AVE $11.8K

- Daily Mail, U.K. – Feature article on Toronto as well as Prince Edward County in the UK's widely read Daily Mail, Sunday edition, as a result of an individual press trip in the summer 2022.
  Reach 875,125, AVE $74.8K

- Decanter, U.K. - Feature article on Prince Edward County in the influential wine-lifestyle magazine.
  Reach 199,381, AVE $4.9K

- Frankfurter Allgemeine Sonntagszeitung, Germany – Feature travel story in one of Germany's top daily national newspapers on touring Northern Ontario, featuring Forest the Canoe outfitters.

- Neue Westfaelische, Germany – An individual press trip for writer Juergen Juchtmann has resulted in four feature articles to date in this regional newspaper serving northern Germany, highlighting Algonquin Park, Ottawa, Niagara Falls, Niagara-on-the-Lake, and Toronto.
  Reach 1.6M, AVE $44.9K

**Radio and Television**

Destination Ontario's broadcast program regained momentum post-pandemic, reaching a record number of on-location broadcasts promoting Ontario attractions, experiences and overnight stays. The program continued to build strong relationships with television and radio stations while expanding into the U.S. market in targeted border states.

The broadcast program expanded its reach to new targeted media outlets, including three multicultural stations and one LGBTQ2S+ station resulting in 4.4K broadcast minutes promoting 224 industry partners with an AVE of $21M and a reach of 223.4M in both Canada and the U.S. markets. Achievements include:

- Summer Campaign – Coordinated 33 on-location radio and television broadcasts in eight RTOs promoting summer Ontario attractions and experiences, including a kick-off to summer in Niagara Falls with Breakfast Television broadcasting its entire morning show live from Oakes Garden Theatre and a full episode of Fox New Day Cleveland showcasing Niagara Falls to the U.S. Market.
  Reach: 124.4M, AVE: $5M

- Fall Campaign – Coordinated 14 on-location radio and television broadcasts in seven RTOs promoting ways to enjoy the fall season in Ontario, including a road trip broadcasting live in a different RTO each day.
  Reach: 33.5M, AVE: $4.2M

- Winter/Spring Campaign – Coordinated 40 broadcasts in five RTOs promoting winter activities and destinations in Ontario, including a seven-station radio junket at Blue Mountain Resort, where all stations broadcasted their full morning shows live-on-location.
  Reach: 65.6M, AVE: $12M

**International Consumer Marketing**

<u>Discover Together</u>

In November 2021, Destination Ontario launched the first phase of the Discover Together Campaign in the UK and Germany. The objective was to increase unaided awareness, consideration and travel intent. The campaign engaged U.K. and German expats, living in Ontario, to inspire and encourage visitation by making it easy to

imagine moments together. The content targeted both high value travellers as well as those with Ontario connections.

In order to continue building back Ontario's pre-pandemic visitor volume, and inspire action for upcoming seasons, Destination Ontario launched a Discover Together extension campaign in both markets in Spring 2022.

The campaign extension saw even stronger results than Phase 1, with destination awareness and prospecting tactics outperforming targets and exceeding industry benchmarks across the two markets. Summary of results below:

Germany;

81.5M total impressions across all channels & tactics, 13.1M completed video views, 296.5K total ad clicks, 5.7K total recorded web sessions,177.9K total projected web sessions

U.K.

138.5M total impressions across all channels & tactics, 33.5M completed video views, 789.4K total ad clicks, 16.7K total recorded web sessions, 473.6K* total projected web sessions

International Search and Discover Campaigns

Paid search connects consumers with Destination Ontario and is a key driver of consumer traffic to the Destinationontario.com website and subsequently leads to our partners. Knowing visitation, consumer behaviour, and search activity shifted through the pandemic, Destination Ontario launched an 'Always On' Search pilot program in our priority international markets, anchored by the latest search trends, keywords and market nuances

The program included dedicated search campaigns in the UK, Germany and France, and a discovery campaign in Mexico .

The campaign ran from June 2022 – March 2023 and garnered 66M impressions, a click through rate of 3.64%, 2.4M ad clicks, over 790.7K web sessions, and 16.4K* clicks to partners (projected web sessions and outbound link clicks are estimated to be higher as tracking is limited in international markets due to privacy laws and cookie deprecation) Destination Ontario may employ a new modelled conversion strategy to improve the accuracy of web sessions/outbound link clicks for 2023-24 search campaigns

## CORPORATE SERVICES AND OPERATIONS

### Ontario Travel Information Services

Destination Ontario's OTIS team provides various visitor information channels for all tourists – whether they be international, U.S., domestic, regional or local – to receive travel advice and information on destinations, attractions, and product experiences

across Ontario. Staff continue to use a visitor care approach to provide recognized visitor information services and deliver engaging customer service through personalized trip and itinerary planning. Extending beyond the traditional bricks and mortar of the travel information centres, services are provided across different delivery channels with a view to extending visitor stay and spend.

**Modernized Visitor Information Services**

The OTIS team continued to expand and enhance its service delivery models to adapt to visitors changing travel patterns and information needs. Travel Counsellors were able to provide personalized visitor information services in-person at OTICs and roaming at major attractions and tourist locations as well as over the phone, virtually by video conference and by email.

**Visitor Health Score (VHS) and Trips Planned**

OTIS continued to measure and track the Visitor Health Score (VHS)[1], introduced in 2021-2022, across all service delivery channels. As all OTICs were operational and all other service delivery channels functional throughout the entire fiscal 2022-2023, a solid key performance VHS baseline was tracked that will be used next fiscal. The VHS reflects the quality-of-service visitors receive across all service delivery channels. It aggregates the Net Promoter Score (NPS), Customer Satisfaction Score (CSAT) and Service Level (SL). [2]In 2022-23, OTIS staff achieved a VHS score of 95, an NPS of 90, CSAT of 98 and SL of 98, all out of 100 and were able to counsel a total of 84,913 parties through its service delivery channels (in-centre, curbside, roaming, over the phone, virtually and by email) and create a total of 81,799 Trips Planned. The Trips Planned metric was introduced in 2022-2023 and is defined as the number of travel-related consumer interactions across all OTIS channels, including new activity, a trip planned and/or itinerary developed, an enhancement or increase to an existing travel plan or itinerary or a booking is made that results in incremental visitor spend.

**Ontario Travel Information Centres (OTICs)**

In fiscal 2022-2023, as mentioned above, the OTICs were able to remain open to the public throughout the year to provide in-person travel counselling services. However, they operated with varying schedules based on the ever-changing travel demand and available staff resourcing. Some maintained reduced days and hours of operation to meet the slower travel demand and focus on supporting roaming activities, email, virtual travel counselling and the 1-800-ONTARIO tourism line. However, the Bainsville and Tilbury OTICs, located in the high traffic ONroute Service Centres, were open 7 days a week and Niagara Falls and Sault Ste. Marie, 6 days a week. Although the uptake was minor post-pandemic, OTICs continued to offer its curbside pick up option to serve visitors from the comfort of their vehicle after contacting the OTIC to request information

[1] Visitor Health Score (VHS) reflects the quality-of-service visitors receive. VHS is comprised of NPS 40%, CSAT 40% and SL 20%

[2] NPS is an industry measure of how likely a customer would promote our service. Target score across all channels is 80%. CSAT is an industry measure of how satisfied a customer was with the service they received. Target score across all channels is 77%. SL is a measure of how quickly visitors receive responses to their inquiries. Target score for SL is 80% across all channels

and materials. As the health and safety of OTIS staff and visitors continued to be Destination Ontario's top priority, operations in the OTICs continued to be guided by government health protocols and safety measures. This meant plexi glass remained in place at all service counters, the staff ensured the use of Personal Protective Equipment (PPE) and hand sanitization stations were set up for the visiting public. Staff also continued to partner with tourism organizations and businesses to sell tourism experiences and attractions and offer onsite promotional opportunities to industry stakeholders. To provide improved tracking and analytics of visitor traffic patterns and with a goal of improving business operations, modernized door counting technology was procured and installed in all centres. Visitation did increase significantly over 2021-2022 (37,216) and a total of 205,518 travellers visited the 10 OTICs. Travel Counsellors also continued to work remotely and offered travel counselling services by phone, video conference and email.

*"Fantastic experience! Customer representative was extremely helpful, friendly, and informative. I appreciated all the assistance I received. Thank you!"*

**1-800-ONTARIO toll free tourism phone line**

OTIS staff continued to service English and French calls to the 1-800-ONTARIO line 7 days a week, from 9 am to 5 pm. A total of 9,132K callers were travel counselled with 92% ending in Trips Planned. Staff answered questions on trip planning, parks and attractions, camping and border and customs. Many times, follow up information was sent by email to callers. CSAT, NPC and SL in this channel all scored 100% across the board.

*"If only everyone in this world was as friendly and pleasant as the counsellor I was speaking with. 11+ service."*

**Destination Ontario Website's New Consumer Email Address**

OTIS staff continued to respond to both English and French travel email inquiries from consumers 7 days a week from 9 am to 5 pm. On December 21, 2022, the service was integrated into Zendesk, Destination Ontario's customer care tool, to manage customer interactions seamlessly and build a comprehensive knowledge base for OTIS travel counsellors. The tool also allowed OTIS to centralize email inquiries in one place, facilitate handoff between teams, eliminate redundant manual data entry and have automated data reporting and visualization. Through the integration process, the consumer email address was changed from travelinfo@ontario.ca to visitorcare@destinationontario.com to align with the OTIS Visitor Care strategy to deliver engaging customer experiences. The NPS for email was lower at 74% and was attributed to complaints regarding other government services or Ontario tourism attractions and products non-related to Destination Ontario. Thus, travel counsellors were not able to solve all of the emailers complaints. However, customer satisfaction scored 96%, and service wait time 94% out of 100.

*“Prompt, very professional response via both email and "snail" mail. Have already recommended to friends and would do so again. Looking forward to a driving visit to the province in a few months.”*

**Virtual Travel Counselling (VTC) Services**
As this service transitioned beyond a pilot program to a core service delivery channel, additional OTIS staff were assigned and trained to the VTC channel. On April 1, 2022, Destination Ontario introduced an online booking tool (Picktime) through Destination Ontario’s website that allowed consumers to schedule a virtual travel counselling session in English or French. The tool resulted in over 50% additional bookings and a significant decrease in “no shows”. To encourage more bookings and for ease of the consumer, the in-take form was also reduced to one, quick free form requesting information the traveller was seeking on their preliminary travel ideas or plans. Moreover, OTIS added more evening and weekend appointments to the staff schedule to better serve consumers. In 2022-2023, OTIS staff conducted a total of 151 virtual travel counselling sessions, with 99% ending in Trips Planned. The customer service score in this channel was 100%, and NPS 94%. Note that wait time service level scores are not tracked as appointments are pre-booked for all sessions.

*“I learned so much and I got the information that I needed. The Travel Counsellor went beyond on what I was expecting. I'm glad I did the virtual session because it helps to plan for my family trip. It also saved me time. Thank you”*

**Roaming Ambassadors and Mobile Visitor Information Centres (VICs) Program**
The roaming ambassadors and mobile visitor information centres (VICs) program, where staff worked on site at partners’ attractions and events with mobile vehicles (gazebos, tents and tricycles) and provided on the spot information services to visitors through tablets and limited printed material also continued in 2022-23 and expanded into a few new locations such as Yonge Dundas Square in Toronto and a partnership with the federal Department of Canadian Heritage on Parliament Hill in Ottawa. A total of 14,672 visitors spoke to a travel counsellor resulting in a score of 100% across the NPS and CSAT (note that wait times are also not measured in this channel), and 98% of interactions resulted in a trip planned.

*“Outstanding customer service! The Travel Counsellor showed excellent intelligence when directing me to the best attractions to find in amazing Cornwall!”*

**Finance and Corporate Services**
Destination Ontario Corporate Services continued to improve workplace practices and performance through the implementation of identified efficiencies, training, advisement, and other supports.

From a people management perspective, Corporate Services continued providing guidance, support and advice to employees and management at all levels regarding human resources matters. This included information on workforce management, talent

and performance management, labour relations, health and safety, recruitment and retention, and learning and development.

Destination Ontario remains committed to ensuring its workplace culture is one that is respectful, diverse, inclusive, equitable, and free from harassment and discrimination. The organization's 2022 OPS Employee Experience Survey results demonstrated favourable scores around engagement levels, leadership attributes and inclusion. The Corporate Services team continued to explore opportunities for continuous improvement to ensure all employees feel that Destination Ontario is an organization where they are supported, safe, and provided with the tools and resources needed to effectively perform their roles and responsibilities.

From an employee performance planning perspective, Destination Ontario's priorities for the year were as follows:

- Strong Research, Strong Outcomes and/or Dynamic Organization: Continue to develop a holistic research approach and improve how data is mined to incorporate insights into strategic planning and in all marketing activities across the organization. Strengthen advertising impact tracking and investigate and adopt new, innovative measurement tools. Connect, lead and inspire a team approach within the organization and across the industry. The agency will be nimble, adopt a culture of ongoing program evaluation and regularly evaluate program performance.
- Visitor First Marketing and/or Redefining Partnerships: Start with an empathetic understanding of the traveller's needs, interests, planning and purchase behaviour. Inspire travel to and around Ontario and focus investment on highest return markets, integrate market activity and remain flexible to opportunities. It also includes having modern marketing campaigns informed by data and consumer insights. Emerging technology and marketing trends will inform the mediums that Destination Ontario markets in and the activities the agency undertakes. Lead and collaborate with industry partners toward mutual success, strong return on investment and provide value to industry stakeholders.

Guided by a commitment to fiscal responsibility and opportunities for modernization, Destination Ontario continued its oversight of the agency's corporate services (financial controllership and administration, human resources, information technology, business continuity, procurement, facilities and administrative services) to continue identifying cost savings. As a result, Corporate Services delivered on many activities that achieved improved effectiveness and efficiency, as well as activities to support the organization and industry. This included:

- Securing the services of the Transformation Consulting Services branch to help with the development of Destination Ontario's Multi-Year Strategic Plan. Engaged in reflection, reconsideration and thoughtful planning to ensure Destination Ontario is positioned on a trajectory in which it remains a productive,

effective, and relevant partner for the province's tourism sector and, most importantly, deliver efficient and strong public service.

- Continuous improvement of the budget planning process and establishing more frequent updates to allow Destination Ontario to be more proactive in identifying opportunities to reallocate the budget and meet Destination Ontario's goal of spending within 1% of its allocation.
- Arranged cyber security tabletop exercise for the management team to increase awareness of how a cyber security incident can affect the organization, assess the ability to deliver time-critical services and assess communication gaps.
- Promoting cross-functional teams, and where optimal, cross-functionality across budget lines on shared activities.
- Achieved a 74% response rate for the annual OPS employee experience survey.
- Continued collaboration with MTCS legal department for advice on various contract agreements to ensure appropriate accountability and transparency.
- Arranged training for all staff on eApprovals to modernize Destination Ontario's approval processes. Once fully implemented, eApprovals will replace the traditional approvals process of print, sign, scan, email and repeat, and eliminates version control issues.
- Continued commitment to diversity, equity and inclusion by means of ongoing educational workshops and open dialogue sessions for all staff.
- Promoted fair hiring practices by supporting internal and external recruitments of management and staff-level positions.
- Supported organizational changes to ensure efficient alignment of services within the Brand Marketing area.
- Established and facilitated bi-monthly HR sessions for Destination Ontario executive leadership.

In summary, the Corporate Services team continued to champion an organizational culture that enables the leadership team to be equipped with sound advice, helpful tools and coaching strategies to continue building high-performing teams and innovative products to advance the mandate of the Agency. Our efforts will strengthen the leadership team's confidence in managing programs, processes and human capital in an effective and efficient manner.

**Compliance with *Accessibility for Ontarians with Disabilities Act***

Destination Ontario continues to comply with the Accessibility Standards for Customer Service, Ontario Regulation 429/07 (Customer Service Standard) and Integrated Accessibility Standards, Ontario Regulation 191/11 under the *Accessibility for Ontarians with Disabilities Act (AODA), 2005* administered by the Accessibility Directorate of Ontario. Destination Ontario continues to ensure corporation-wide compliance and that all staff are trained and aware of the obligations under the AODA. Multi-Year Accessibility Plan and Accessibility page on destinationontario.com updated for 2021-2027.

## PERFORMANCE MEASURES

| VISITOR VOLUME & EXPENDITURE | | | |
|---|---|---|---|
| | ***2021-22 Actuals*** | ***2022-23 Target*** | ***2022-23 Actuals*** |
| **Ontario** | | | |
| **Incremental Trips** | 71K | 293K | 167.3K[1] |
| **Incremental Visitor Spending** | $18.2M | $37M[2] | $40.5M[2] |
| **U.S.** | | | |
| **Incremental Trips** | N/A[3] | 555K | 225.5K[1] |
| **Incremental Visitor Spending** | N/A[3] | 151M | $139.7M[4] |
| **North America and Overseas (via trade channel)** | | | |
| **Incremental Trips** | 4.3K[1] | 20K | 14.4K |
| **Incremental Visitor Spending** | $8.5M | $5M | $24.5M |
| **Number of New Products Developed – North America & Overseas** | 26[5] | 20 | 28 |

1. Incremental visitation numbers were lower than projected, likely due to factors like higher costs of travel, pent-up travel demand, gradual lifting of travel restrictions and border opening.
2. Target was slightly exceeded, likely due to factors like higher travel prices, and increased travellers taking longer overnight trips.
3. Due to Canada/U.S. border closures and restrictions in 2021-2022.
4. Despite the increase in travel prices, it did not offset the drop in incremental trips.
5. Actuals reflect in year programming that was not anticipated in support of industry recovery in the context of COVID-19

| VISITOR FIRST MARKETING | | | |
|---|---|---|---|
| | ***2021-22 Actuals*** | ***2022-23 Target*** | ***2022-23 Actuals*** |
| **Earned Media Relations (AVE $Ms)** | $42M[1] | $35M[2] | $56.2M |
| **Online Video Views (75% - Completed)** | 88M[3] | 100M | 108.4M |

| | | | |
|---|---|---|---|
| **Social Engagement Rate (% (likes, reactions, comments, shares and clicks/reach)** | 1.5% | 2.0%[2] | 2.10% (Audience Growth) and 10.33% Content Advocacy |
| **Travel Trade Trained (#)** | 4.1K | 2.5K | 3.8K |
| **RE-DEFINING PARTNERSHIP** | | | |
| | ***2021-22 Actuals*** | ***2022-23 Target*** | ***2022-23 Actuals*** |
| **Total Leads to Industry Partners** | 3.7M | 9.04M[3] | 11.99M[4] |
| **Partners' Cash Contribution ($)** | $315K[5] | $2.1M | $1.96M |
| **Ontario Stakeholders Participating in Destination Ontario-Led Programs (#)** | 147 | 175 | 876 |

1. Actuals reflect in year additional programming that was not anticipated in support of industry recovery in the context of COVID-19.
2. Due to continued restrictions on travel, AVE and social engagement are expected to be lower until travel returns to pre-pandemic levels.
3. Targets reflect planned initiatives in the context of COVID-19 and anticipate travel restrictions for Ontario, the U.S., Mexico and overseas.
4. Actuals reflect live campaign optimization, incremental media efficiency and continuous in-year test and learning initiatives.
5. Higher cash contribution is related to the pilot partnerable fall campaign

**DEFINITIONS**

| **Key Performance Indicator (KPI)** | **Definition** |
|---|---|
| Incremental Trips | Number of trips taken (outcome) by those influenced by the campaign. |
| Incremental Visitor Spending – Ontario and U.S. | Number of trips taken (outcome) by those influenced by the campaign multiplied by the average visitor spend, as measured through the *Brand and Advertising Tracking Study,* conducted by a third-party research supplier. |
| Incremental Visitor Spending – North America and Overseas (via trade channel) | Estimated direct expenditures (outcome) from travel trade channel bookings. An expenditure based on estimated number of trips booked as a direct result of campaign or joint marketing initiatives with travel trade and conversion partners internationally. Average per person/night pleasure trip expenditure of visitors to Canada as reported by Destination Canada (based on Statistics Canada's International Travel Survey) is applied to the number of nights reported by trade channel partners. |

| | |
|---|---|
| Number of New Products Developed | The actual number of packages, itineraries, experiences incorporated (outcome) by trade channel partners (new additional overnight in Ontario, new itinerary, new experiences added to itineraries, etc.). |
| Earned Media Relations (i.e., Advertising Value Equivalency or AVE) | The amount in Canadian dollars a similar size story would cost if it appeared as paid advertising at a 1:1 equivalency ratio, determined by measuring the size/length of the story by the advertising rate of the relevant media outlet. |
| Paid Broadcast (Reach) | Number of people reached from on-air paid advertising on television and/or radio. |
| Online Video Views (75% - Completed) | Video advertising viewed 75% to its entirety either on digital or social platforms (paid and organic). |
| Social Engagement Rate | Destination Ontario owned domestic and international (excluding China) social handles - percent of likes, reactions, comments, shares and clicks divided by total reach. |
| Travel Trade Trained | Number of tour operator staff and travel agents trained on Ontario tourism products by Destination Ontario or in conjunction with Destination Canada. |
| Total Leads to Industry Partners | Ad clicks or tracked website visit to partner websites:<br>• From ontariotravel.net (Canada, U.S., France, India, Brazil, U.K., Mexico, Japan, Korea, Germany and China markets).<br>• From Destination Canada partnered initiatives.<br>• From Destination Ontario-led campaigns or initiatives. |
| Partners' Cash Contribution | The dollar amount of cash that partners provide to Destination Ontario to execute a Destination Ontario-led campaign or initiative. |
| Ontario Stakeholders Participating in Destination Ontario-Led Programs (#) | The number of stakeholders that participate in a specific program, initiative, broadcast or marketing project with measured deliverables where Destination Ontario staff lead the coordination and execution (paid and non-paid). |

## RISK ASSESSMENT

Management reviews risk on an ongoing basis, including quarterly management reports, and year-end and in-year audits. The Audit Finance and Risk Committee of the Board of Directors regularly reviews and discusses with management corporate policies on internal control to assure itself that appropriate processes are functioning effectively, to monitor the risks to which the organization is exposed, and that internal control is effective in managing risks to an acceptable level. Throughout 2022-23, Destination Ontario remained a flexible and dynamic organization, with the ability to adjust accordingly when internal and external changes impacted DO operations.

## FINANCIAL STATEMENTS

### For the Year Ended March 31, 2023

The Ontario Ministry of Tourism, Culture and Sport is the principal source of agency revenue, contributing ninety-one percent ($33.1M) of Destination Ontario's $36.2M operating revenue. The remaining portion is self-generated through merchandise sales at the Travel Information Centres and the establishment of a Destination Ontario-led collaborative and partnerable marketing system that leveraged partner funds and content to connect consumers with trip ideas and operators. Destination Ontario recorded an operating deficit of $4.8M after a depreciation of $0.7M on capital assets. The operating deficit was made possible by the drawdown of an operating surplus of $4.6M from the fiscal year 2021-22 when marketing campaigns were paused in order to wait for the right timing when international travel was no longer restricted. Spending in 2022-23 was guided by the best possible market intelligence available to make timely and responsible decisions and maximize value-for-money.