

FOR
4-
N
ON

STRATEGIC PLAYBOOK

DESTINATION
ONTARIO

An Agency of
the Government
of Ontario



CONTENTS

3 INTRO

4 *Introducing the 2024-2027 Playbook*

6 *Letter from the Board Chair & CEO*

7 WHO WE ARE

8 *Destination Ontario*

10 *Values That Drive Success*

12 *What's Impacting DO*

15 *Preparing for the Traveller of Tomorrow*

16 *Principles That Guide the Playbook*

17 THE STRATEGY AT A GLANCE

22 *Reporting Cadence & Connection*

23 FOUR STRATEGIC PRIORITIES

25 *1. Making Strategic Investments*

29 *2. Aligning Outcomes Through Strategic Partnerships*

33 *3. Advancing Corporate Leadership*

37 *4. Levelling Up*



INTRO



Introducing **THE 2024-2027 PLAYBOOK**

Destination Ontario is the lead tourism marketing organization for Ontario, Canada, marketing Ontario to travel consumers within the province, across the country and around the world.

This Playbook is Destination Ontario's strategy to make a significant impact on the tourism industry over the next three years and beyond. It marries the understanding of the past with the vision for the future and provides a clear commitment to excellence in marketing and dedication to collaboration and partnership.

The Playbook is intentional in choosing priorities that reflect where Destination Ontario is best positioned to lead and where success is vital. The development of the Playbook was guided by stakeholder consultation, market intelligence, consumer insights, research and staff input. Destination Ontario will pursue its commitment, striving to adapt and excel in the face of an ever-evolving tourism landscape. Destination Ontario understands that any measure of success will

be achieved through collaboration and teamwork and is driven to accomplish great things together.

This Playbook is a three-year Strategic Plan, which is aligned with the fiscal planning cycles commencing April 2024 to March 2027. It highlights major priorities and supporting initiatives that will drive the work. It will guide the development of Marketing and Business Plans, which result in annual programs and activities aligned to the Playbook. The priorities and initiatives are intended to set the organization on a path for long-term success and provide strong value for money.

When the previous Playbook was published in 2018, the world was a dramatically different place. Since then, Destination Ontario has adapted to become more nimble in making decisions and modernizing efforts in the face of unprecedented challenges and profound uncertainty. Accelerating technological advancements, evolving consumer preferences, rising geopolitical tensions and an uncertain economic



outlook have converged to define the present context and shape the future. It is Destination Ontario's duty to ensure that the organization is ready to adapt to the changing external pressures facing the organization and to grow the value of tourism in the province.

Destination Ontario has been an innovative marketer and trusted partner to Ontario's tourism sector for more than 25 years. The Playbook is committed to continuing that role and bolstering provincial tourism through marketing strategies and increasing the tourism value across Ontario.

Post-pandemic, the tourism industry continues to grapple with challenges. On a positive note, Ontario is beginning to see a gradual rebound in tourism activity. Destination Ontario will thoughtfully execute the 2024–2027 Playbook, achieve the four Strategic Priorities and continue to deliver on the Mandate, Vision and Mission.

The Playbook must be comprehensive in order to rebound tourism in Ontario to pre-pandemic levels. Destination Ontario is committed and will continue to work closely with the Ministry of Tourism, Culture and Gaming (Ministry) to support its priorities and align efforts. Additionally, Destination Ontario works collaboratively with the industry, including Destination Canada, Regional Tourism Organizations (RTOs), Destination Marketing Organizations (DMOs), sector associations, tourism businesses and other partners to maximize marketing opportunities and recovery efforts. Destination Ontario will continue to target priority markets with a strong return to drive economic impact, deliver tourism revenue and support Ontario tourism businesses.

Destination Ontario will rely on the Playbook to guide its marketing strategies to support increasing visitation and generating increased tourism expenditures.

Letter from the Board Chair & CEO



As Chair of Destination Ontario, I am pleased to be part of our new 2024–2027 Playbook. I extend the Board's "Thank You" to our past President and CEO Lisa LaVecchia, our current President and CEO Vincenza Ronaldi and the team at Destination Ontario, who have diligently, over the past year, reviewed critical components that will drive our work over the next three years.

Our Mandate, Mission, Values and Strategic Priorities will deliver on our Vision. The Board of Directors offered guidance and strategic direction for the Playbook focused on improving industry collaboration and supporting Ontario's economy.

Our new Playbook was developed with consultation from our key stakeholders, market intelligence, research and staff input. We are mindful that continued input, throughout implementation is imperative to maintaining strong partnerships with Ontario's tourism stakeholders and achieving a successful outcome.

I am confident this Playbook will help foster a stronger tourism industry in Ontario, resulting in increased visitation, more jobs for Ontarians and strengthening Destination Ontario as an organization. We look forward to working with all partners to welcome travellers to Ontario.

Todd Halpern
Chair, Destination Ontario



Destination Ontario's Playbook was developed with an enthusiasm and drive that will contribute to achieving the priorities, initiatives and expected results outlined in the following pages. I am honoured to have shared in the development of the Playbook with Lisa LaVecchia, our past President and CEO. Equally, I am inspired to lead its successful implementation. Having the support and involvement of our Board of Directors, our dedicated staff, Ministry of Tourism, Culture and Gaming colleagues, and the important input from our tourism partners contributed to the core elements of this plan and continued our foundation of collaboration and alignment.

We hope this Playbook helps everyone understand Destination Ontario's purpose and focus over the next three years. It is an important reference for Destination Ontario's team as we undertake our return from a difficult few years due to COVID and move forward. Succeeding in the strategic priorities and initiatives will make us a stronger marketing organization, enhance partnerships with our stakeholders and contribute positively to Ontario's tourism economy.

Personally, I am elated to be part of an organization that has the ambition and inspiration to bring this new Playbook to life and be part of the exceptional team that will help make Ontario's tourism industry soar.

Vincenza Ronaldi
President and CEO, Destination Ontario

WHO
WE
ARE



Destination Ontario

Destination Ontario takes immense pride and care in the responsibility to lead the province's tourism marketing efforts and share the people, places and experiences Ontario has to offer.

MANDATE

Destination Ontario, legally named the Ontario Tourism Marketing Partnership Corporation (OTMPC), is governed by Ontario Regulation 618/98 made under the Development Corporations Act. Its mandate, as provided for in the regulation, is:

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

VISION

To position Ontario as a preferred global destination.

MISSION

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

Destination Ontario remains committed to its Mandate, Vision and Mission to help stimulate growth and economic vitality in Ontario. Operating in a highly competitive landscape, the agency will continue its strategic investments and collaborative initiatives to drive positive outcomes for Ontario's tourism industry, supporting sustainable growth and prosperity in the years ahead.

Destination Ontario will strategically invest in key markets that generate the strongest return on investment. Destination Ontario will play a differentiated role as the provincial marketing organization within Ontario's tourism ecosystem, with a dedicated focus on strategic partnerships and high-impact marketing campaigns.

As the lead provincial marketing organization for the province, Destination Ontario recognizes the value and importance of its mandate and will continue to focus on the delivery of strong results and value for money.



THE ORGANIZATION

As an Agency of the Government of Ontario, Destination Ontario is governed by a Board of Directors comprised of business leaders recommended by the Minister of Tourism, Culture and Sport. Board members are publicly appointed by the Ontario Lieutenant Governor in Council. Destination Ontario staff will continue to work closely with the Board to ensure they have the necessary briefing materials and information to help them provide informed strategic guidance, overall direction and primary focus of the organization.

The President and CEO's Office provides executive support to the President and CEO in the operational planning, management and implementation of the agency's initiatives, including management of the Board and industry committees. As an agency of the Ministry, Destination Ontario regularly liaises with the Ministry. The President and CEO's Office will continue to work closely with the Ministry to collaborate on government communications and programs to support the industry.

Destination Ontario's priorities, goals, initiatives and outcomes continue to align with the priorities and direction of the Government of Ontario.

Destination Ontario's primary mandate, as the lead provincial tourism marketing organization, is to market Ontario as a preferred tourism destination. Destination Ontario builds positive destination awareness and consideration through integrated marketing campaigns within Ontario, across Canada and in priority U.S. and international markets to promote Ontario as a preferred travel destination.

Destination Ontario's marketing efforts are supported by and developed in collaboration with tourism partners across Ontario, including Regional Tourism Organizations, Destination Marketing Organizations, sector associations, other provincial agencies, individual tourism operators and Destination Canada. International marketing efforts are further supported by in-market agencies.

Values That Drive Success

Destination Ontario staff are guided by the corporate values to continuously improve as an organization and strengthen the work completed. These values are present through work and

interactions with staff, visitors and partners. The values demonstrate the strength of Destination Ontario's staff, dedication to partners and to government accountability to deliver excellence.



CONNECT

Destination Ontario brings together a diversity of talent to deliver on each project. Destination Ontario connects with stakeholders through strong partnerships—an instrumental collaboration to generate strong results for Ontario destinations and businesses. Destination Ontario is pleased to be able to work with so many partners: the national partner, Destination Canada, provincial-territorial organizations, Regional Tourism Organizations, Destination Marketing Organizations, sector associations, agency attractions, other government ministries and agencies and the private sector.



LEAD

Destination Ontario recognizes that as Ontario's provincial marketing organization, it is in a position to lead. Destination Ontario leads marketing through alignment with partners around common business objectives, strengthening Ontario's position as a preferred destination.

Equipped with strong marketing expertise, Destination Ontario is confident in its ability to lead partnerships, understanding that to maintain its edge, evolution is essential for honing the organization's collective capacity and skills.



INSPIRE

Destination Ontario's purpose is to inspire travellers to discover Ontario. Destination Ontario engages meaningfully with consumers to choose Ontario and be inspired to share their experiences with family and friends.

As an organization, Destination Ontario is inspired by what it does and shares that inspiration with partners to grow and learn together.



What's Impacting DO

The COVID-19 Pandemic had a massive, unprecedented impact on Ontario, Canada and the world. The impact on tourism in Ontario in 2020 was greater than that experienced after 9/11, SARS and the 2008 economic crisis combined.

However, Ontario's tourism industry is on a trajectory towards recovery and approaching 2019 levels, driven by domestic visits. In 2023, Ontario experienced its highest level of tourism activity since the onset of the pandemic. In 2023, Ontario welcomed 12.7 million international visitors (U.S. + overseas visitors), more than 1.5 times those from 2022 and over three-quarters (77%) of the number of arrivals observed in 2019.¹

Destination Ontario's activities and plans will continue to be informed by the latest evolving available data and trends.

Tourism in Canada is a growing industry and a leading economic driver. Pre-COVID, tourism was Canada's fifth-largest sector, responsible for 10% of Canadian jobs, \$105 billion in revenues and 2.3% of GDP.²

Within Canada, Ontario is the largest travel destination. Pre-COVID, Ontario received 43% of all visits in Canada and 34% of the country's total visitor spending. Tourism receipts in Ontario reached \$38 billion in 2019 and generated \$36.8 billion for Ontario's total GDP, contributed \$5.8 billion in provincial taxes and supported over 395,500 jobs.³

Global travel is making a strong comeback and traveller demand and positive consumer sentiment around travel continue to grow. As the recovery of travel accelerates, tourism in Ontario in 2023 continued to gain momentum with increased recovery rates compared with 2022. While progress is evident, there remains a need for continued recovery in certain key markets.

Ontario's complete recovery may be held back by economic and financial conditions, including elevated inflation, tighter monetary policy, labour shortages, economic unease and slower recovery from Destination Ontario's target markets in Asia and Europe. Climate-related disruptions, such as forest fires and an evolving geo-political backdrop are also threats to Ontario's tourism recovery.


Recent changes to visitor visa requirements for Mexican citizens travelling to Canada pose a risk to the Mexico visitor market, Ontario's only international market to have fully recovered and surpassed 2019 levels. The industry continues to face challenges related to the workforce, the return of business travel and, despite momentum in tourism rebound, international visits and spending continue to be lower than their pre-pandemic levels and global competition for travellers is fierce.

According to Destination Canada's Fall 2023 Tourism Outlook, total overnight visits in Canada are not expected to recover until at least 2024. The pace of tourism's recovery in Canada will vary by source market. While some markets showed signs of visitation recovery in 2023 (Canada and Mexico), Destination Canada expects that recovery in other markets will occur later. Overnight visits to Canada from the U.S. and Australia are anticipated to recover in 2024, followed by the U.K. in 2025 and Germany, France, Japan and South Korea in 2026. Visitation from China is not expected to surpass the level observed in 2019 until 2028.

¹ Statistics Canada, Frontier Counts

² Tourism Industry Association of Canada

³ Statistics Canada's National Travel Survey, Visitor Travel Survey, Travel Arrangement Survey and MTCS' Tourism Regional Economic Impact Model (TREIM).



In 2023, Ontario experienced its highest level of tourism activity since the onset of the pandemic.



Preparing for the Traveller of Tomorrow

To be successful, Destination Ontario must become a more adaptable and resilient organization. That means being prepared to adapt quickly to external factors that influence the work and the sector.

Just some of these include:

Competition for the traveller is increasing

- Border restriction changes in Canada and around the world have created new opportunities and improved access to key markets. There is aggressive competition on every front in attracting travellers.

Macroeconomic conditions remain a source of uncertainty for all travellers

- Rising interest rates, heightened inflation and geopolitical tensions will impact international and domestic travellers through both their intention to travel and their level of expenditure.

Heightened expectations from travellers have made digitization an urgent priority

- Consumers expect a “frictionless” end-to-end travel experience. Beyond just booking the flight and accommodations, consumers respond to destinations where there are numerous digital options to engage with services and locations that provide hyper-personalized experiences.

Armed with consumer insights, travel trends and market conditions, Destination Ontario annually plans marketing strategies across key markets of focus to help deliver on the mandate, activate implementation plans and teams and contribute to the success and guidance of this strategic plan.

DOMESTIC MARKET

Destination Ontario will continue to work in collaboration with industry to encourage travel in and around Ontario. Campaigns will focus on fall and winter seasons to support seasonal growth opportunities while supporting all seasons with an Always-On content and social strategy with a strategic emphasis on overnights. In the Ontario market, Destination Ontario will build on its collaborative partner marketing system that connects domestic travellers with partner planning content and operators with bookable products. Destination Ontario will look to broaden its marketing efforts into other Canadian regions with the highest potential with pilot campaigns, partnership opportunities, content, search and social efforts.

UNITED STATES MARKET

The U.S. market is one of the highest potential markets for Ontario. Destination Ontario will continue to prioritize the U.S. market as a key driver to incremental revenue into the province, partnering with gateway cities and regional partners to encourage U.S. drive-and-fly markets to visit and drive increased visitation and expenditures to Ontario. Destination Ontario partners with Destination Canada in key high-yield markets and will continue to strive for valuable activations and opportunities to build relevance and intent with the target travellers.

INTERNATIONAL MARKET

The international traveller is important to Ontario's tourism economy as they typically stay longer and spend more in Ontario than a domestic visitor. While international travel to Ontario is rebounding and global competition for travellers is increasing, Destination Ontario will continue to use an integrated approach to ensure that international travellers choose Ontario.

International markets of priority are the United Kingdom, Germany, France, Japan, China, South Korea, Mexico and Australia.

PRINCIPLES THAT GUIDE THE PLAYBOOK

Guiding principles introduced a consistent rationale for the development of this Playbook. They enabled the identification, assessment and selection of the priorities. They assisted in determining what made sense for Destination Ontario to pursue and how to conceptualize each priority in the most useful way.

Each priority and associated initiatives were guided by ...



Defined parameters and outcomes to help focus the work



Fosters a sense of shared accountability



Responds to the needs of industry stakeholders



Aligns with government priorities and our organizational mandate



Endures into the future



THE STRATEGY AT A GLANCE



The Playbook ensures the achievement of the Mission contributes to Ontario's tourism receipts and exceeds 2019's \$38B record year. To do this, four Strategic Priorities have been developed. Each priority has three-year targets to be achieved by 2027. To achieve the targets, each priority is supported by a series of key initiatives and expected results. The diagram below demonstrates the 2024-2027 strategy at a glance.

While Destination Ontario has established three-year targets with deliberate intent, these targets are subject to a variety of influencing factors including delayed reporting for some measures, allocated budgets, strategic market focus and partnership

dynamics. Specifically, projected increments in visits and expenditures are heavily dependent on the efficacy of chosen media channels, levels of investment and defined marketing objectives.

Moreover, the rapid evolution of media channels, advancements in artificial intelligence, the prevalence of zero-click searches and the fluctuating costs of content and media all significantly impact the accuracy of targets, which remains the best estimate grounded in current strategies and financial commitments. To ensure the attributability of our measures with our strategic targets, Destination Ontario commits to an annual review of these components throughout the duration of the plan.

THE STRATEGY AT A GLANCE

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.



INDUSTRY INDICATORS

To contribute to Ontario's tourism receipts and exceed 2019's \$38B record year.

Will be updated to align with future ministry targets.

STRATEGIC PRIORITIES

THREE-YEAR TARGETS

1



MAKING STRATEGIC INVESTMENTS

- 3.5 million visits and \$1.5B spend by 2027
- 32.5M leads to partners by 2027
- Tourism Brand Health Score – Benchmark Year 1
- Maintain Visitor Health Score – 90% or greater by 2027
- Increase trips planned by 10% by 2027

2



ALIGNING OUTCOMES THROUGH STRATEGIC PARTNERSHIPS

- Partner Satisfaction Score – Target: 75+ by 2027
- Program Interest vs. Accommodated Programs (X:X Scale)
- Increase corporate partnerships – Target: 10 corporate partnerships by 2027
- Maximize revenue base for DO allocation – 8.5% additional partner revenue of base allocation by 2027 (approx. \$2.8M)

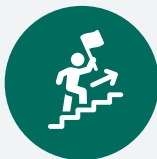
3



ADVANCING CORPORATE LEADERSHIP

- Increase Corporate Leadership Score – Benchmark year in Y1
- Education Series Usefulness Score – Target: Cumulative Score of 80 by 2027
- Education Series Future Attendance Score – Target: Cumulative Score of 80 by 2027

4



LEVELLING UP

- DO performance and capabilities measures – Benchmark Year 1
- DO Engagement Employee Index Score, relative to the OPS – Target: 5% increase by 2027
- Staff satisfaction score of 76.6% (2024) – Target: Increase by 5% by 2027

Note: Destination Ontario is currently in the process of updating our proxy visits and spend model. During this period, please be advised that the accuracy of displayed calculations may be affected.





MEASURING THE PLAYBOOK

The measurement of the impact of the Playbook will be an annual measurement anchored by targets to be achieved by 2027. An annual review of the Playbook allows for a review of activities, the Wall of Work (a more detailed supporting plan to the Playbook) and ensures strategies are in place when developing new Marketing Plans and the Business Plan for the new fiscal year. This performance measurement will be a guide for the organization, the Destination Ontario Board and the Ministry.

MEASURING THE MANDATE

Quarterly corporate performance reporting monitors annual performance aligned with the annual Marketing Plans and Business Plans (approved by the Board and Ministry). These performance measures capture activity across teams for cumulative reporting and will guide the organization, the Destination Ontario Board and the Ministry. Quarterly performance reviews will allow Destination Ontario teams to assess progress and determine whether pacing is on point or if shifts need to be made to meet the three-year Playbook targets.

THE ANNUAL PROCESS

This Playbook provides the roadmap and focus for success with measurable outcomes and three-year targets. The chart below demonstrates that Destination Ontario follows a structured approach to performance measurement, emphasizing the achievement of measurable outcomes.

To support this roadmap, each year Destination Ontario develops marketing and operational plans across business lines. These plans outline annual outcomes and targets anchored by key performance indicators to monitor progress and pace for market strategies. Destination Ontario's annual Business Plan outlines collective outcomes for the year across all business lines and details each marketing and operational function, targets and key performance indicators. The performance of these plans will be monitored by quarterly mandate reporting for the Board, Ministry and Destination Ontario teams, ensuring transparency and accountability. Successes are celebrated and adjustments are made, as necessary. The organization remains adaptive, identifying strategic triggers that signal the need for a playbook refresh in response to significant domestic or global developments. Overall, Destination Ontario's structured approach guides its efforts towards achieving measurable results and fulfilling its mandate within the tourism sector.

Reporting Cadence & Connection

THREE-YEAR STRATEGIC PLAN

DESTINATION ONTARIO STRATEGIC PLAN 2024-27

Destination Ontario's Strategic Plan provides the roadmap for growth with measurable outcomes and three-year targets.

Strategic Priorities:

1. Making Strategic Investments
2. Aligning Outcomes through Strategic Partnerships
3. Advancing Corporate Leadership
4. Levelling Up

The plan has three-year targets that will be reported annually to assess progress and optimizations.

Takes Effect: April 2024

Annual Reporting: June

MARKETING PLANS

Destination Ontario develops annual marketing plans for key markets of focus outlining market insights, approach and investment. These plans are brought to the Board for review and approval.

Marketing Plans:

- Ontario Plan
- International Plan
- Canada Plan
- Northern Ontario Plan
- U.S. Plan

Board Approval: September

Quarterly Reporting:

Q1: Sept | Q2: Dec | Q3: March | Q4: June

BUSINESS PLAN

An annual, ministry mandated business plan is developed each year detailing Destination Ontario's marketing and operational plans.

The business plan details Objectives, Outputs, Outcomes and KPIs. These measures align with key measures from the marketing plans.

Board Approval: December

Ministry Approval: Q4

ANNUAL REPORT

The annual report is a ministry mandated report back on Destination Ontario's business plan.

The annual report captures the results aligned to the Objectives, Outputs, Outcomes and KPIs detailed in the business plan.

Board Approval: June

Report to Ministry: June



FOUR STRATEGIC PRIORITIES

The next diagram highlights the four strategic priorities. A selection of planned initiatives and associated outcomes are presented on the following pages. Additional initiatives and outcomes will be worked on year to year and brought forward in the annual Business Plan.





1 MAKING STRATEGIC INVESTMENTS



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

Making strategic investments in marketing is essential for driving return on investment (ROI) and contributing to the vitality of the Ontario tourism economy. By ensuring that marketing decisions are evidence-based, organizations like Destination Ontario can allocate resources effectively, focusing on initiatives that have the greatest potential to generate positive outcomes. Evidence-based decision-making involves analyzing data, market trends and consumer behaviour to

identify opportunities and tailor marketing strategies accordingly. This approach not only maximizes the impact of marketing efforts but also helps mitigate risks associated with investment decisions. Ultimately, strategic investments in marketing contribute to the growth and sustainability of the Ontario tourism economy by attracting visitors, stimulating spending and promoting the unique offerings of the region. Highlighted initiatives include:

INITIATIVE	EXPECTED RESULT
Evolve Brand Positioning for Key Markets: Focus on evolving brand positioning for key markets to increase positive awareness of Ontario as a must-visit destination.	Increased destination awareness and travel intention for Ontario generating visitation and expenditure growth from key markets.
Strengthen Business Development, Media Relations & Public Relations and Consumer Marketing in International Markets: Strengthen business development and consumer marketing efforts in international markets increasing travel awareness of Ontario.	Increase consideration of Ontario as a travel destination among international travellers expanding Ontario's presence and appeal in key international markets and growing tourism visitation and spending.
Leverage Destination Canada's Target Segment of 'High Value Guests' (HVG): Utilize the target segment of 'High Value Guests' (HVG) to drive international travel to Ontario.	Increased visitation and spending by high-value guests in Ontario.
Optimize Content Strategy to Engage and Grow Audiences: Continued focus on content strategy optimization, deliver a highly discoverable and engaging content experience that motivates potential travellers to action through a strong visitor-first content strategy.	Drive user engagement, expanded audience reach, content advocacy and amplification. Additionally, optimize for improvements in conversion rates, user retention and lead generation.
Evaluate and Test New Market Opportunities for Northern Portfolio: Leveraging mobility data and consumer research, evaluate and test new markets of opportunity for avid target markets and for the Northern portfolio.	Market growth opportunity, evaluations and potential increased partnerships and reach. Enabling Northern Ontario to tap into emerging markets and diversify its offerings. By utilizing data-driven insights, this initiative aims to identify and capitalize on untapped opportunities for tourism growth.
Develop Merchandise Strategy: Focus on developing a comprehensive merchandise strategy.	Increased sales, brand visibility and engagement by leveraging merchandise offerings and partnerships.
Implement the Ontario Travel Information Services (OTIS) Modernization Plan: Implement the OTIS Modernization Plan to continue modernizing digital and roaming visitor information services.	Improved digital engagement to meet the evolving needs of travellers while optimizing operational processes including expanded reach to diverse demographics and regions across the province through increased presence at key festivals, events and high-traffic locations, measurable cost savings, enhanced customer experience satisfaction and operational efficiency.
Pilot Partnership Models for Ontario Travel Information Services: Explore and pilot innovative partnership models, including the use of experiential activations to increase visitor engagement and influence travel patterns.	Mutually shared benefits realized with partners, along with an increased number of potential travellers engaged, resulting in increased trips planned and increased spending on Ontario's tourism products and experiences in addition to increased incremental spending.
Implement Value for Money Audit Recommendations: Optimize the value derived from Destination Ontario investments and ensure that financial resources are utilized efficiently and effectively.	Enhance Destination Ontario's service delivery, aligning practices with prudent financial management principles.



MAKING STRATEGIC INVESTMENTS

Measuring Success

INDUSTRY CONTEXT

**Tourism
Receipts**

**Visitor
Spending**

Visits

**Ontario's Share of
Visits in Canada**

DO MEASURES & TARGETS

Incremental Visitation
and Expenditures



3.5M visits and \$1.5B spend by 2027

Leads to Industry



32.5M leads to partners by 2027

Ontario Tourism Brand
Health Measure



Brand Health Score – Benchmark Year 1

Maintain overall Visitor Health Score
(VHS) of at least 90 and increase
VHS by 1 point by end of Year 3



**Maintain Visitor Health Score –
90% or greater by 2027**

Increase total number
of Trips Planned



Increase trips planned by 10% by 2027



ALIGNING OUTCOMES THROUGH STRATEGIC PARTNERSHIPS



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

Partnerships play a critical role in driving value and achieving common business outcomes. By aligning with industry, private sector and government partners, Destination Ontario can leverage collective resources, expertise and networks to achieve mutually beneficial goals. Strategic partnerships enable collaboration on initiatives that may be beyond the scope or capacity of any single entity, leading to enhanced innovation, efficiency and effectiveness.

Furthermore, these partnerships foster synergy and alignment of objectives, ensuring that efforts are coordinated and resources are utilized optimally. Ultimately, aligning outcomes through strategic partnerships enables Destination Ontario to maximize impact, expand reach and drive sustainable growth while fostering stronger relationships within the ecosystem. Highlighted initiatives include:

INITIATIVE	EXPECTED RESULT
<p>Develop a Refreshed Partnership Strategy: A comprehensive approach that rigorously assesses alignment, deliverables and results in collaboration with key stakeholders and partners.</p>	<p>→ Execution of strategic partnerships with both current and new stakeholders, which align with Destination Ontario's priorities and maximize mutual benefits for all parties involved.</p>
<p>Champion Team Ontario with Destination Canada: Align and leverage the support and resources of Destination Canada to enhance Destination Ontario's investments, amplifying the impact of marketing endeavours, broadcasting initiatives and partnership ventures.</p>	<p>→ Heightened prominence and recognition of Ontario as a destination on the global stage through increased visibility, enhanced marketing campaigns and strengthened collaborative efforts with international partners.</p>
<p>Leveraging Strategic Opportunities on the World Stage: Targeting Destination Ontario's participation in globally momentous events (e.g. FIFA) to leverage strategic opportunities on the world stage to elevate Ontario's profile.</p>	<p>→ Increased international recognition of Ontario, heightened interest from potential visitors and expanded opportunities for tourism-related partnerships and collaborations on a global scale.</p>
<p>Develop and Implement a Three-Year Northern Ontario Tourism Marketing Strategy: The focus is to build on the collective impact and partnership structure of Northern Ontario.</p>	<p>→ With the support and guidance of Destination Ontario's Northern Marketing Committee, this will result in a marketing strategy that aligns and optimizes the efforts of the organization with partners in Northern Ontario. A strategy that will enhance the effectiveness and impact of tourism marketing in Northern Ontario.</p>
<p>Expand the Broadcast Partnership Program Continue to expand broadcast reach with new media outlets in both Canada and the U.S. in partnership with industry partners, other stakeholders, sister agencies and tourism businesses. Showcase Ontario's tourism destinations, attractions and experiences on radio, television, and in social media posts, Reels and Stories.</p>	<p>→ Enhanced strategic partnerships across all RTOs, including multicultural opportunities. Increased reach and awareness among consumers.</p>
<p>Enhance Collaborations with Priority Groups: Centred on Destination Ontario's ongoing commitment to enhance relations and further collaborate with Persons with Disabilities, Indigenous, Black, Racialized, Francophone, Two-Spirit and/or Non-Binary, Transgender and Women.</p>	<p>→ Stronger relationships and increased partnership opportunities with priority groups, resulting in higher visitation rates, enhanced community involvement, increased revenue and economic benefits for Ontario's tourism sector.</p>
<p>Enhance Government Collaboration and Collective Learning: Improve communication and collaboration within and across government partners impacting the tourism industry, while fostering collective learning and leadership among agencies of the Ministry of Tourism, Culture and Gaming.</p>	<p>→ Increased awareness of Destination Ontario's mandate and offerings, streamline activity planning and enhance marketing strategies through improved cross-government collaboration.</p>



ALIGNING OUTCOMES THROUGH STRATEGIC PARTNERSHIPS

Measuring Success

INDUSTRY CONTEXT

Assess Ontario's competitiveness in comparison to other provinces

Ontario's share of visits in Canada

PMO marketing spend vs. Ontario marketing spend

DO MEASURES & TARGETS

Industry Partner Programs
Partner Satisfaction Score



Score of 75+ by 2027

DO Program Interest vs.
Accommodated (X:X Scale)



Benchmark Year 1

Increase corporate
partnerships



**10 corporate partnerships
by 2027**

Maximize rev
base for DO allocation



**8.5% additional partner
revenue of base allocation
by year 3 (approx. \$2.8M)**





ADVANCING CORPORATE LEADERSHIP



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

Establishing a strong presence in the Ontario tourism industry is essential for the growth and success of Destination Ontario. Active engagement and communication with stakeholders not only enhances Destination Ontario's visibility and reputation within the industry but facilitates the exchange of valuable insights, best practices and expertise. By building strong engagement, Destination Ontario can contribute to the collective modernization and growth of the tourism

sector in Ontario. This proactive approach benefits Destination Ontario and supports the broader tourism ecosystem, fostering innovation, collaboration and sustainable development. Ultimately, building a robust presence in the Ontario tourism industry positions Destination Ontario as a key player, enabling it to effectively promote Ontario as a premier destination and drive positive economic outcomes for the province. Highlighted initiatives include:

INITIATIVE

EXPECTED RESULT

Strengthen and Develop Strategic Engagement with the Tourism Industry: Strengthen and develop collaborative relationships with industry partners to enable shared success in positioning Ontario as an attractive travel destination while harnessing Destination Ontario's distinct and unique position within the landscape with key stakeholders and partners.



Strengthening the overall standing of Destination Ontario within the tourism industry; create more meaningful collaboration and consultation into Destination Ontario plans and activities; minimize duplication of effort and leverage investment.

Prioritize Destination Ontario-Led Advisory Groups: Focused on enhancing Destination Ontario's leadership in consulting and engaging with partners and industry stakeholders to cultivate a revitalized synergy to bolster support for mutual goals. Establish a platform for improved coordination, fostering collaboration and generating innovative initiatives.



Leverage collective expertise and commitment to enhanced tourism promotion, elevated marketing strategies and contributions to the overall growth and sustainability of the travel industry.

Diversify and Increase Corporate Partnerships: Deploy strategic tactics to diversify and increase the number of corporate partnerships for Destination Ontario.



Enhanced corporate identity and growth in revenue streams.

Strengthen Corporate Communications: Enhance Destination Ontario's corporate identity and awareness. Become a respected champion of tourism marketing in Ontario by leveraging Destination Ontario's passionate storytellers and marketers to provide intelligence tools and resources to help the Ontario tourism industry reach domestic and international markets.



Build trust, reputation and engagement with industry stakeholders and partners through enhanced thought leadership, brand awareness, media coverage, social media presence, stakeholder engagement, external collaboration and crisis communication preparedness.

Enhance Leadership within the Visitor Information Services (VIS) Network: Increase information sharing and engagement efforts, to model visitor-first customer care and improve the efficiency of local and regional VIS by sharing information and best practices.



Increased leadership role for OTIS within the VIS network, resulting in heightened support by OTIS to the network and effectiveness to enhance the coordination of the VIS network, ensuring a more robust and supportive framework for effective visitor information services with a focus on visitor care.

Improved understanding of potential benefits of AI service delivery: Research and pilot an AI strategy aligned with relevant government regulations and standards, to explore the advantages of integrating AI into marketing practices.



Identify opportunities to utilize AI technology for enhancing travel information services, streamlining operations and boosting overall organizational efficiency.



ADVANCING CORPORATE LEADERSHIP

Measuring Success

DO MEASURES & TARGETS

Increase Corporate
Leadership Score for
Destination Ontario



Benchmark Year 1

Education Series
Usefulness Score



**Education Series Usefulness
Score Cumulative of 80 by 2027**

Education Series Future
Attendance Score



**Education Series
Attendance Score
of 80 by 2027**





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

For Destination Ontario to continue to be successful as an effective provincial marketer, trusted partner and public resource, it is essential to emphasize continuous improvement of organizational capacity. By levelling up its organizational capacity, Destination Ontario can enhance its ability to deliver on its Vision, Mission, Values and Strategic Priorities. Improving capacity allows Destination Ontario to stay competitive in the dynamic tourism industry, adapt to changing market

trends and consumer preferences and maintain relevance in an evolving tourism landscape. Effectively promoting Ontario as a premier tourist destination will result in attracting visitors and driving economic growth. Levelling up organizational capacity is crucial for Destination Ontario to fulfill its role effectively and achieve long-term success in promoting Ontario's tourism industry. Highlighted initiatives include:

INITIATIVE	EXPECTED RESULT
<p>Strengthen Awareness and Promote Destination Ontario's Vision, Mission, Values and Strategic Priorities: Emphasize and reinforce these fundamental aspects to equip its workforce with a profound understanding of its overarching objectives, fostering a unified and motivated team environment.</p>	<p>→ Heightened employee engagement, alignment with organizational goals, improved knowledge retention, cultivation of a positive organizational culture and potential enhancements in productivity and innovation.</p>
<p>Improve Organizational Processes: Enhance organizational processes to facilitate increased collaboration across teams.</p>	<p>→ Highly efficient, effective and modernized processes that enhance service delivery. By streamlining and optimizing internal workflows and communication channels, foster a culture of constructive collaboration among its teams, ultimately improving overall operational efficiency and effectiveness.</p>
<p>Implement Destination Ontario's Diversity, Equity and Inclusion (DEI) Framework: Focus on inclusivity and diversity to embed Destination Ontario's DEI framework into everyday practices.</p>	<p>→ Create a more diverse and welcoming workplace and services, fostering a culture of inclusivity and respect. Prioritize DEI initiatives and integrate them into its organizational fabric, cultivating an environment where every individual feels valued, respected and empowered to contribute to the organization's success.</p>
<p>Implement a Collective Advancement and Employee Learning Program: Enhance innovation and modern marketing proficiency, aligning ongoing employee learning initiatives with organizational objectives and optimizing employee performance through the strategic use of targeted tools and technology.</p>	<p>→ An agile and adaptable workforce responsive to the evolving demands of the marketing landscape, driving effectiveness and innovation in its marketing initiatives resulting in a more proficient and technology-savvy workforce.</p>
<p>Implement an Employee Engagement Action Plan: Implement targeted actions to boost employee morale and foster a sense of belonging, cultivating a workplace culture where employees feel valued, motivated and empowered to contribute to the organization's success.</p>	<p>→ Strengthened employee engagement, team connection and collaboration, fostering a positive, inclusive and modern work environment.</p>
<p>Strategic Enhancement of Corporate Reporting: A comprehensive overhaul of Destination Ontario's corporate reporting processes, aiming to integrate them more effectively across the organization and standardize their methodologies. Establish a robust corporate reporting framework, underpinned by modern tools and technologies, to track and communicate the progress of Destination Ontario initiatives against strategic goals.</p>	<p>→ Heightened accountability, through quantifiable metrics and the refinement of decision-making processes. Transparency and coherence in its reporting practices will facilitate improved service delivery and more informed strategic decision-making throughout the organization.</p>
<p>Strategic Enhancement of Customer Experience: Measure and evaluate the customer experience across all OTIS channels to ensure the provision of high-quality customer service.</p>	<p>→ Improved customer experience measured by formal and informal audits, resulting in enhanced customer satisfaction and service delivery to elevate the overall customer experience and satisfaction levels as measured by Visitor Health Score (VHS) and other audits strengthening its reputation as a provider of high-quality service with a focus on visitor care.</p>



LEVELLING UP

Measuring Success

DO MEASURES & TARGETS

Increase DO-specific measures to assess performance and capabilities



Benchmark Year 1

OPS EMPLOYEE ENGAGEMENT SURVEY

DO Employee Engagement Score, relative to the OPS



Increase by 5% by 2027

Maintain or Improve Staff Satisfaction Score



Increase Staff Satisfaction Score of 76.6% (2024) by 5% by 2027



***At Destination Ontario
we are committed to
leading the province's
tourism marketing
efforts and to the
importance of
making a lasting
impact on Ontario.***

For more information please contact:

destination**ontario**@ontario.ca

 destination**ontario**.com

@**ontario**travel



#Discover**ON**

DESTINATION
ONTARIO

An Agency of
the Government
of Ontario