

VISITOR ECONOMY STRATEGIC DIRECTIONS REPORT



Credit © Destination Toronto

2023 - 2028

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RECONCILIATION AND TOURISM SERVICES

Visitor Economy Strategic Directions Report is built on the understanding and recognition that the City of Toronto is situated on the traditional territory of many nations including the Mississaugas of the Credit, the Anishnabeg, the Chippewa, the Haudenosaunee, and the Wendat peoples, and is now home to many diverse First Nations, Inuit, and Métis peoples. Toronto is covered by Treaty 13 signed with the Mississaugas of the Credit, and the Williams Treaty signed with multiple Mississaugas and Chippewa bands.

As we enact this way forward, we will reflect on the wealth of knowledge held by generations of creative, innovative, Indigenous peoples who have lived on this land since time immemorial and have shared their knowledge and culture with visitors and settlers.

In our commitment to advancing truth and reconciliation, Tourism Services is guided by the following practices:

- Tourism Services will show gratitude whenever possible to the Indigenous people for their stewardship of the land on which visitors enjoy their stay and acknowledge ongoing Indigenous presence as a vital part of Toronto's community and culture.
- Tourism Services will seek continuous Indigenous input in the development of new initiatives and in updating existing programs.
- Indigenous tourism will continue to be characterized by self-determination and decolonization of practices. This means that Indigenous communities and creators must be at the centre of the decision-making process for any Indigenous-focused tourism initiatives initiated in partnership with the City of Toronto.

Any strategies or programs created by Tourism Services, including workforce or tourism development, will ensure opportunities are available and accessible to Indigenous people.

“ Indigenous placemaking and placekeeping is integral to truth, reconciliation and justice in that it creates and nurtures space, in process and policy, for ceremony, teaching and community; strengthens Indigenous connections with lands and waters; and builds cultural competency and capacity for land-based Indigenous engagement. The outcomes of placemaking and placekeeping initiatives are varied and all are critical for the health and well-being of Indigenous Peoples.

- Reconciliation Action Plan
15. Support Indigenous Placekeeping



85137

Toronto

H3
898-7867

OFFICIAL TOUR

48 hrs. Valid Ticket

ALL TOGETHER

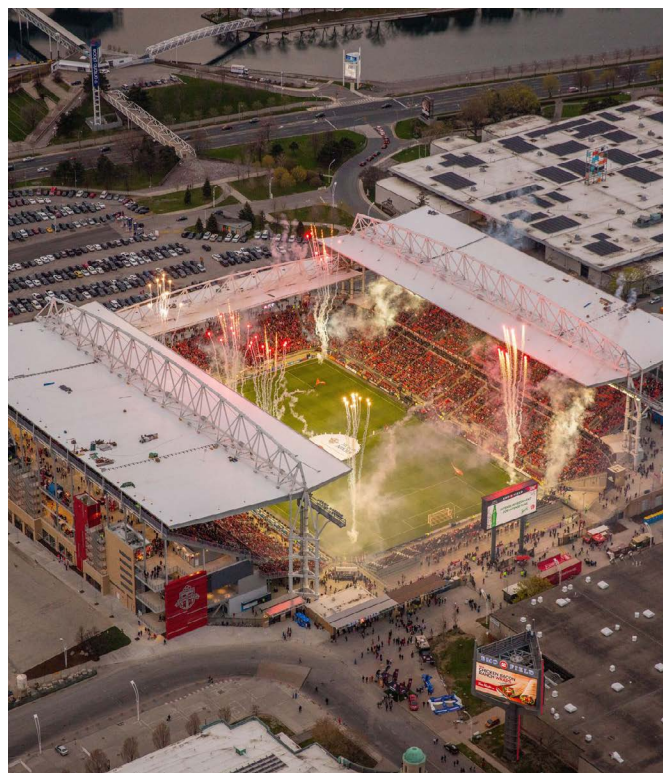
FOREWORD

The tourism industry in Toronto contributes to the city’s cultural vibrancy and to its pre-eminence as a centre for business, while also providing substantial employment opportunities and direct economic impact. Visitors to Toronto help support the city’s events and festivals, contributing to its creative infrastructure, supporting assets that improve the experience, health, and wellbeing of those who call Toronto home. And through the attraction of conferences, conventions, and other events, tourism advances Toronto’s global reputation and contributes to opportunities for businesses located in the city.

Toronto is a natural magnet for global visitors. Ranked as the second-most diverse city in the world by The World Population Review, a global perspective, cultural vibrancy, and inclusive nature are built into its character. Toronto’s culinary scene celebrates the city’s international identity with seventy-four restaurants in the 2022 Michelin Guide, including 13 Michelin starred and 17 Bib Gourmands. Toronto is also home to some of the biggest festivals in the world, such as Toronto Pride, Caribbean Carnival, and Toronto International Film Festival, inviting the world to come to Toronto, and to return year after year. As home for seven professional sports teams, Toronto is a host on the world stage to major events such as the FIFA World Cup in 2026. And as the second-fastest growing tech sector in North America, Canada’s financial centre, and home to five universities, the world does business in Toronto.

Despite all this, Toronto is also in the top ten most livable cities worldwide, and is the second safest city in the world, according to the Economist Intelligence Unit, 2023 and 2021 respectively.

A city with such distinctive attributes has the potential to benefit enormously from a thriving tourism sector. To do so, its unique identity needs to be celebrated and supported through the strategic alignment of the entire tourism sector. The City of Toronto has a unique role to play in ensuring the city benefits from tourism, and also that the tourism industry benefits from the City’s support. Such thoughtful reciprocity requires the City to take a strategic approach, aligned with that of other industry partners. This Strategic Directions Report is intended to lay out a researched, optimal approach to achieving the full potential this extraordinary destination offers to Toronto’s visitors and residents alike.



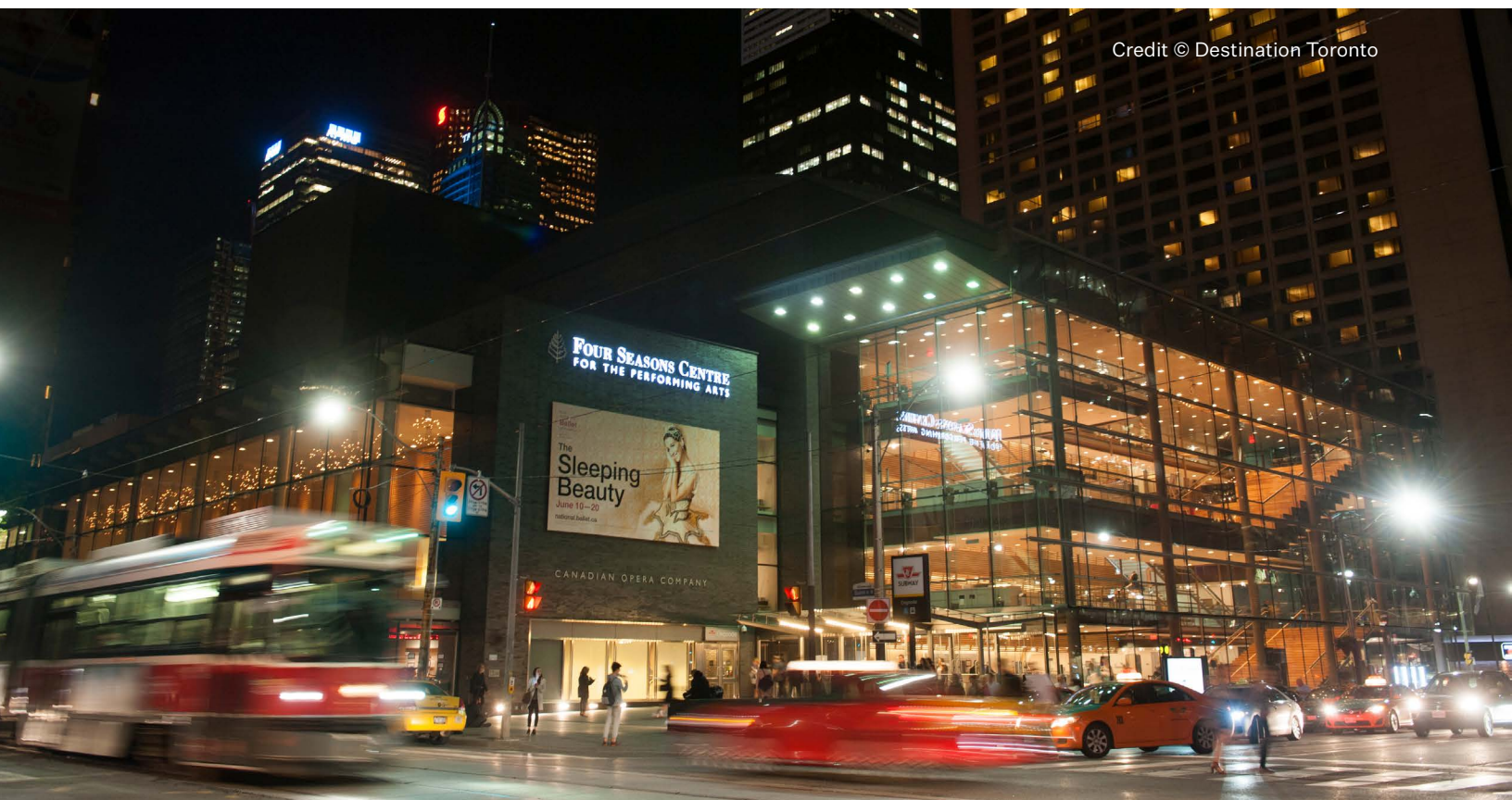
Credit © Maple Leaf Sports Entertainment

EXECUTIVE SUMMARY

Destination Toronto estimates that, pre-pandemic, Toronto's 27.5 million annual visitors generated an economic impact of \$10.3 billion and supported 70,000 jobs (2018)¹. With the significant opportunities the sector presents, it is vital for the City of Toronto to have a current, informed, and forward-looking set of strategic directions to ensure the power of this sector is embraced and advanced, and that it serves to support the City's objectives for Torontonians as well as for those who visit.

In renewing the City's approach to supporting tourism, industry consultation and research occurred consisting of an analysis of Tourism Services programs to date, a jurisdictional scan, industry interviews, industry surveys, and analysis of relevant reports, plans, and studies. This work revealed priority areas for consideration, including current economic realities, shifts in how tourism is defined, and new, broadened thinking about the visitor economy that includes impacts on and benefits to communities, businesses, and the environment.

¹Destination Toronto and Toronto Region Board of Trade: Toronto's Visitor Economy Economic Catalyst for the City and the Region https://assets.simpleviewinc.com/simpleview/image/upload/v1/clients/toronto/Toronto_Visitor_Economy_final_0aefb93e-80ac-42ad-8434-599a5761139d.pdf



Credit © Destination Toronto



What is Tourism Services?

The City of Toronto supports the tourism sector through the Tourism Services Unit housed within Film and Entertainment Industries in the Economic Development and Culture Division. Tourism Services works to improve visitors experiences during their stay and support local industry. Tourism Services historically offered informational services to support visitors upon arrival including the Toronto Tourist Information Centre at Union Station (TTIC), Info-to-Go

mobile information kiosks at key tourist locations, and We've Been Expecting You which welcomed visitors across the city. Additionally, Tourism Services supported partners' activities in workforce development, trained greeters, and produced job fairs support staffing for tourism businesses. Tourism Services also supported tourism-related City initiatives as needed, such as ShowLoveTO and StrollTO, and engaged with industry committees and working groups.



“ The needs shared by Indigenous organizational leaders are essential perspectives that positively impact the City’s decision-making processes. The City commits to working in right relations with Indigenous organizations across a range of support a strong urban Indigenous community.

- Reconciliation Action Plan
6. Improve Relationships with Indigenous Organizations

Impacts of COVID-19 on Toronto's Tourism Industry

As Tourism Services identifies strategic directions to support the tourism industry over the next five years, it does so in a changing environment. Because of the COVID-19 pandemic, the tourism sector globally has been amongst the hardest hit industries and will be one of the last to recover.

Regarding current economic realities, during the pandemic, Destination Toronto estimated the lost economic impact was over \$8B as visitor spending contracted sharply². As it emerges from COVID, the industry continues to face ongoing challenges. For example, a shortage of workers in hospitality and tourism is resulting in service-level challenges, and high fuel prices have impacted travel costs. In addition, there are considerable disruptions in supply chains, inflation is at a 40-year high, interest rates have risen, and airlines and airports struggle to meet demand. When the tourism industry is constrained, the adjacent sectors it nourishes (e.g., retail, arts and culture, restaurants) are likewise affected, making timely and effective supports for tourism important.

Additionally, ongoing global challenges have extended the immediate impact of the pandemic and impede the industry's ability to respond to pent up demand. The global pause caused by the COVID-19 pandemic has prompted fresh thinking about the sector, its impacts, and the outcomes it can attain. There is a movement towards a different approach

to how destinations support tourism and how tourism supports local community. Further, the overarching metrics that define success in a tourism context are changing. While economic prosperity is core for the sector, it can no longer be the sole measure. Destination marketing organizations, globally and locally, are evolving their mandates accordingly, to drive a broader positive impact to both their industry and their jurisdiction.

The hiatus that occurred in tourism during the COVID-19 pandemic has led the industry to identify a shift to more responsible travel with a focus on socio-environmental factors supporting the wellbeing of communities and residents versus visitation growth and profits as the primary goal of tourism. For example, Destination NEXT, in their 2021 Futures Study said, "Prioritizing profit over the health of the planet and wellbeing of people is a legacy that the global visitor industry must address"³. Further, the United Nations in their 17 Sustainable Development Goals⁴ (SDGs) provides a framework with strategies and metrics relating to economic, sociocultural, and environmental sustainability that are applicable to all tourism destinations. Many destinations are adopting a regenerative tourism approach as a result, which strives to create an ecosystem of innovation, collaboration and adaptation that supports economic growth, thriving operations, sociocultural vibrancy, healthy people, and a natural environment for generations to come.

² Destination Toronto: Pandemic Toll on Toronto's Visitor Economy
<https://www.destinationtoronto.com/research/business-intelligence/economic-toll-of-pandemic/>

³ A Strategic Road Map for the NEXT Generation of Destination Organizations. DestinationNEXT 2021 Futures Study. Sept. 2021. To produce the 2021 Futures Study, the project team spoke with more than 150 government, destination, business and community leaders around the world. That is in addition to 706 destination executives from 52 countries who participated in the DestinationNEXT survey.
<https://destinationsinternational.org/reports/destinationnext-futures-study>

⁴ UN Sustainable Development Goals. United Nations. September 2015.
<https://sdgs.un.org/goals>

Looking Ahead and Strategic Alignment

In response to evolving thinking regarding tourism, Toronto's destination marketing organization, Destination Toronto, is likewise evolving beyond its historic priority of serving its membership base of hotels and other major tourism-related businesses. Destination Toronto is extending its focus to the destination as a whole by supporting broader business development through its Toronto Inc. partnership, and uplifting culture and community through a variety of initiatives such as its cultural advisory committee, the Michelin restaurant program, the Now Playing Toronto event database, and many more. This creates many more opportunities for partnership with the City. To date these opportunities have been welcomed, activated, and effective, and they will continue to be leveraged to the benefit of Torontonians and visitors alike.

These new dynamics provide an opportunity for the Tourism Services to likewise shift its approach to industry support. Building on Tourism Services' existing programs, which are largely focused on providing information services to visitors, Tourism Services will take a new and proactive approach to sector development, thereby ensuring the City supports the objectives of the tourism industry, and that the tourism industry likewise supports the City's strategic objectives and goals for local investment and vibrancy.

In addition to changing dynamics, another consideration motivating a review of Tourism Services is that the City of Toronto has launched or is developing city-wide strategies that have potential to support and leverage tourism in new ways. These include the [Reconciliation Action Plan](#), the [Toronto Action Plan to Confront Anti-Black Racism](#), [Night Economy](#), [Cultural Districts Program](#), [TransformTO Net Zero Strategy](#), a regional [Esports Strategy](#), and the Event Hosting Strategy, to name a few. Additionally, the City is on the cusp of hosting major global events like FIFA and others that require the City embed a tourism lens to fully capitalize on the opportunities these events create. The Tourism Services Unit in Economic Development and Culture needs to provide that lens to ensure visitors, residents and the tourism industry are served in a way that advances the destination and the experience of being here year-round.

Bearing these realities in mind, Tourism Services will renew its approach to tourism sector development to ensure support for the local industry is optimized, aligned, and driven by a coherent strategic approach, moving toward a more holistic vision of tourism as a visitor economy that centralizes local community.

Thoughtful and focused implementation of the Visitor Economy Strategic Directions Report will contribute to the overall success of the tourism sector in the city. In addition, it will help ensure Toronto not only recovers, but establishes new benchmarks for inclusive prosperity, opportunity, and livability.



Credit © Destination Toronto



Overview: Strategic Directions

To that end, Tourism Services' strategic directions have three broad priorities that will translate into annual action/work plans:



Strategic Priority 1: Provide a Gateway to Municipal Services and Support Destination Alignment

Tourism Services will be a proactive entry point and advocate for industry's engagement with all aspects of municipal government. Whether leveraging the City's convening power, facilitating inter-governmental advocacy on industry issues, providing information or support for priority goals such as climate or equity, supporting growth of tourism enterprises through sector development, or simply facilitating event support or access to space, Tourism Services will ensure industry partners in the visitor economy benefit fully from the assets and services uniquely provided by municipal government.

Further, Tourism Services will be the centre of expertise and a bridge to the tourism industry for Toronto's municipal government. As a major industry in Toronto, the needs of this sector should be considered in the development of City policy, planning, strategies, advocacy, and other initiatives. Tourism Services will support and enhance the City's work by consulting with industry to ensure all City staff have a current understanding of industry needs and opportunities.

Tourism and the visitor economy are often ideally positioned to support the City in the achievement of key strategic goals, such as those in the [Reconciliation Action Plan](#) or [Toronto's Action Plan to Confront Anti-Black Racism](#) as examples. Where the visitor economy can be leveraged to support cultural, economic, or social goals, Tourism Services will engage industry to activate the benefits they can provide toward achieving City objectives.

By focusing on leveraging and serving the unique attributes of municipal government, Tourism Services will support destination alignment, ensuring the City serves the needs of industry partners in a singular way, contributing to an effective ecosystem that supports the industry and the residents of Toronto.



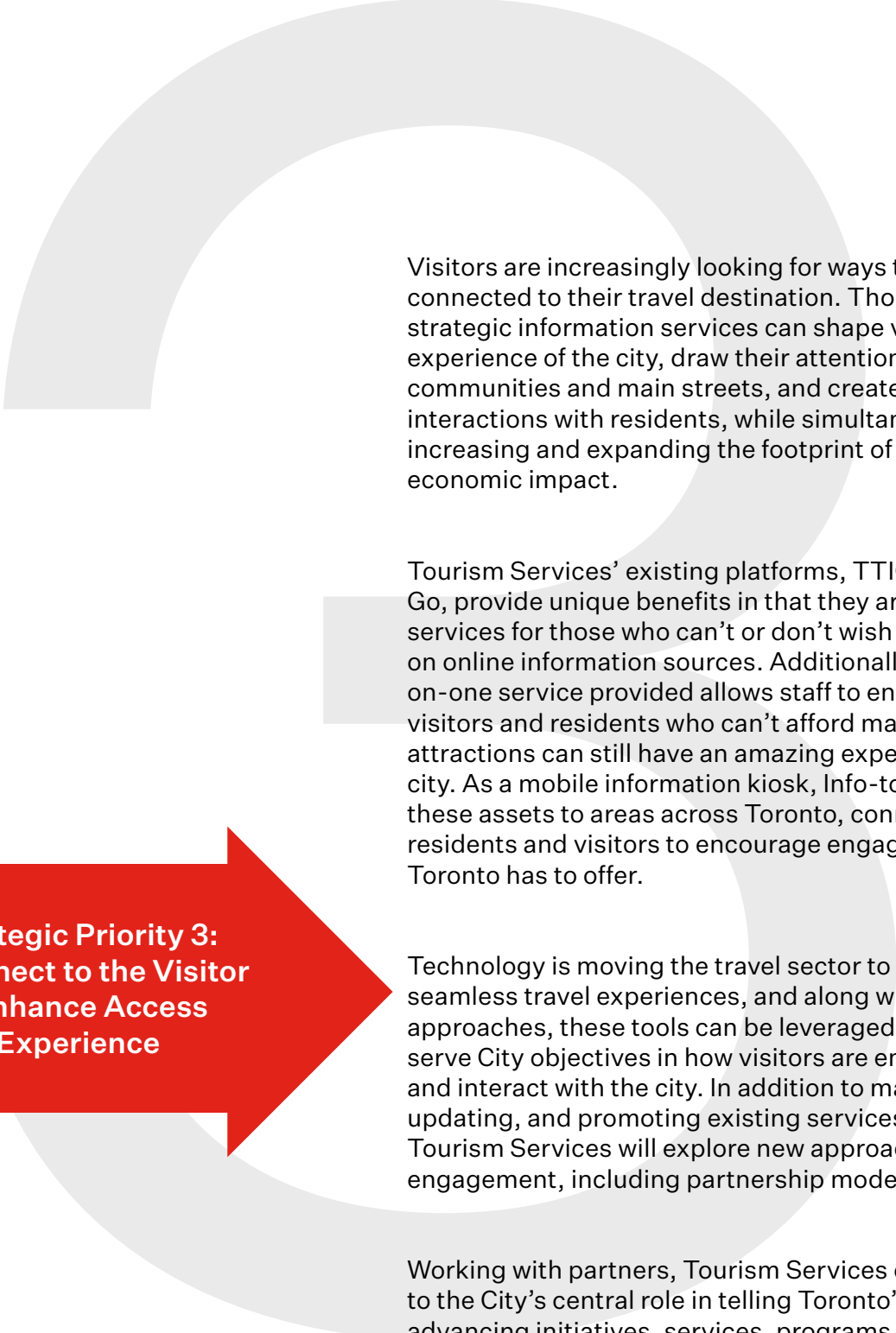
**Strategic Priority 2:
Connect to Communities
through a 'Locals-first'
Approach**

Tourism plays an important role in enhancing communities by adding amenities, attractions, investment, and opportunities that not only benefit visitors, but also increase quality of life for residents. Local communities likewise enhance the visitor economy by providing authentic, singular experiences grounded in a unique sense of place and culture. Tourism Services will support the industry in taking a 'locals-first' approach to tourism. Prioritizing how tourism impacts the resident will drive a shift towards sustainable tourism goals filtered through a lens of resident quality of life, economic prosperity, and sociocultural vibrancy.

Celebrating Toronto's diversity in the neighbourhoods where it thrives, Tourism Services will advance equity and inclusion by ensuring Toronto's varied communities and their events and businesses are linked to visitors and to the opportunities the visitor economy brings. In addition to supporting economic impact driven by hyper-local visitation, Tourism Services will augment the industry's employment impact by ensuring Torontonians who are Indigenous, Black, racialized, 2SLGBTQ+, or living with disabilities are engaged in workforce development that leads to good jobs in this vital industry.

Business travel including conventions and conferences has tremendous potential to advance local industries in ways that last long after the event. Working with internal and external partners to ensure local industry derives enduring benefits from this part of the visitor economy, Tourism Services will support City and partner alignment on priority sectors and engagement with local businesses.

Through this approach, tourism will be leveraged to enhance the lives of Toronto's residents and businesses, advancing cultural vibrancy, and building economic opportunities across the city.



**Strategic Priority 3:
Connect to the Visitor
to Enhance Access
and Experience**

Visitors are increasingly looking for ways to feel connected to their travel destination. Thoughtful and strategic information services can shape visitors' experience of the city, draw their attention to communities and main streets, and create meaningful interactions with residents, while simultaneously increasing and expanding the footprint of the industry's economic impact.

Tourism Services' existing platforms, TTIC and Info-to-Go, provide unique benefits in that they are essential services for those who can't or don't wish to rely solely on online information sources. Additionally, the one-on-one service provided allows staff to ensure that visitors and residents who can't afford mainstream attractions can still have an amazing experience of the city. As a mobile information kiosk, Info-to-Go brings these assets to areas across Toronto, connecting with residents and visitors to encourage engagement with all Toronto has to offer.

Technology is moving the travel sector to a place of seamless travel experiences, and along with in-person approaches, these tools can be leveraged to better serve City objectives in how visitors are engaged and interact with the city. In addition to maintaining, updating, and promoting existing services and tools, Tourism Services will explore new approaches to visitor engagement, including partnership models.

Working with partners, Tourism Services can contribute to the City's central role in telling Toronto's story by advancing initiatives, services, programs, and tools that make enhanced connection part of an overall experience that is meaningful and memorable.

New Focus, New Identity

With a broader understanding of tourism and the visitor economy and with a shift in focus from transactional services to strategic integration and collaboration between the City, the industry, and the local community, the unit's name should change to reflect this new purpose. As a name for the unit, Visitor Economy Office captures the expanded mandate and replaces the more operational name, Tourism Services.



Credit: © Destination Toronto

TOURISM LANDSCAPE

The tourism industry is a substantial contributor to Gross Domestic Product (GDP), employment, and tax revenue. Additionally, visitor spending provides significant financial support to adjacent industries such as arts and culture and retail. In Canada, Ontario is the biggest beneficiary of the economic impacts derived from

tourism. Province-by-province comparisons show Ontario had 30% of the national GDP generated by tourism, a greater share than any other province. The industry was profoundly disrupted by the COVID-19 pandemic, and though recovery is occurring more rapidly than originally projected, full recovery has not yet been achieved.

In Canada, prior to the COVID-19 pandemic, tourism accounted for:

- 2% of national GDP
- \$25 B in tax revenue
- employment for an estimated 2 million Canadians⁵

“...inclusive economic development occurs when economic opportunities and outcomes improve across Toronto’s population in parallel to overall growth of the city and regional economy. Applying this definition, inclusive economic development adds measures of economic opportunity and inclusion to the City’s objective of overall GDP and employment growth.

- Economic Development and Culture Division Strategic Directions 2022-2023
3. Combat Economic Inequity - Developing and Implementing a Coordinated Approach to Inclusive Economic Development

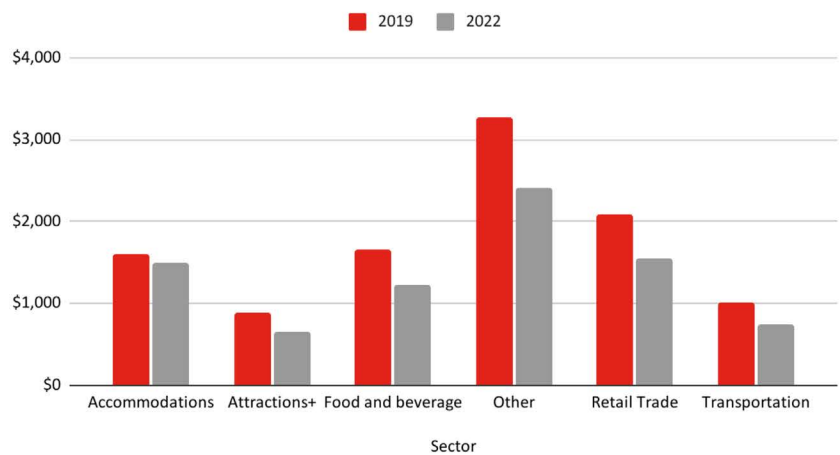
⁵[Sustaining Canada’s Tourism Sector through COVID-19, Destination Canada McKinsey Report, March 2020](#)

Toronto Tourism Snapshot: Economic Impact of the COVID-19 Pandemic

Tourism is recovering in Toronto, though economic impact, employment, and GDP are more than 20% below 2019.

Visitor Economy Impact: Toronto

Visitor Economy Impact (millions)

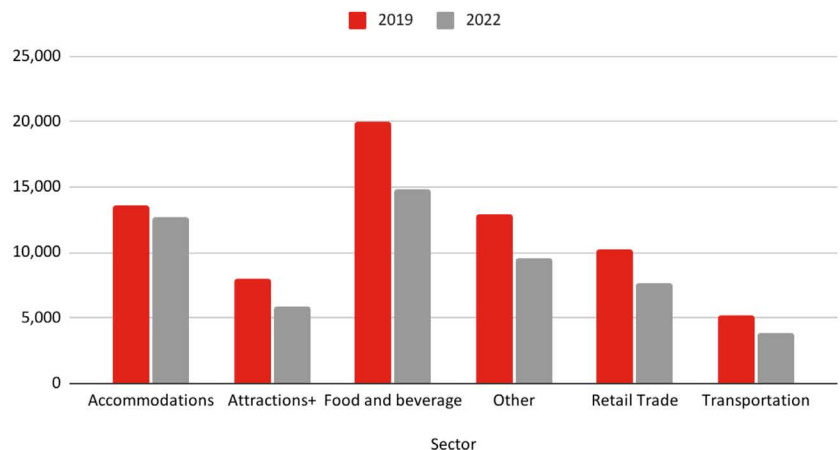


\$8.11B (-22.90% vs 2019)
Visitor Economy Impact 2022

Source: Destination Toronto

Tourism Employment: Toronto

Tourism Employment

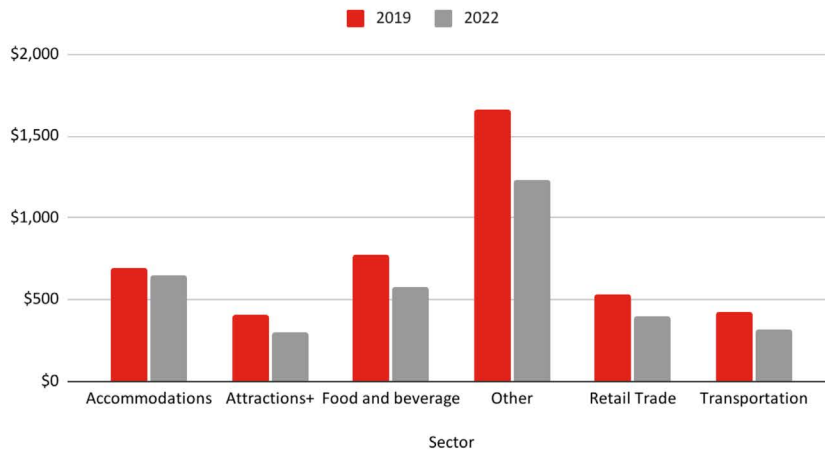


55,974 (-22.11% vs 2019)
Total employment generated 2022

Source: Destination Toronto

Tourism GDP contribution: Toronto

Total Tourism GDP (millions)



\$3.5B (-22.88% vs 2019)
Total Tourism GDP 2022

Source: Destination Toronto

Projections for Recovery

Recovery is underway after the COVID-19 pandemic and Toronto tourism businesses are gradually building back and gaining confidence in a brighter future.

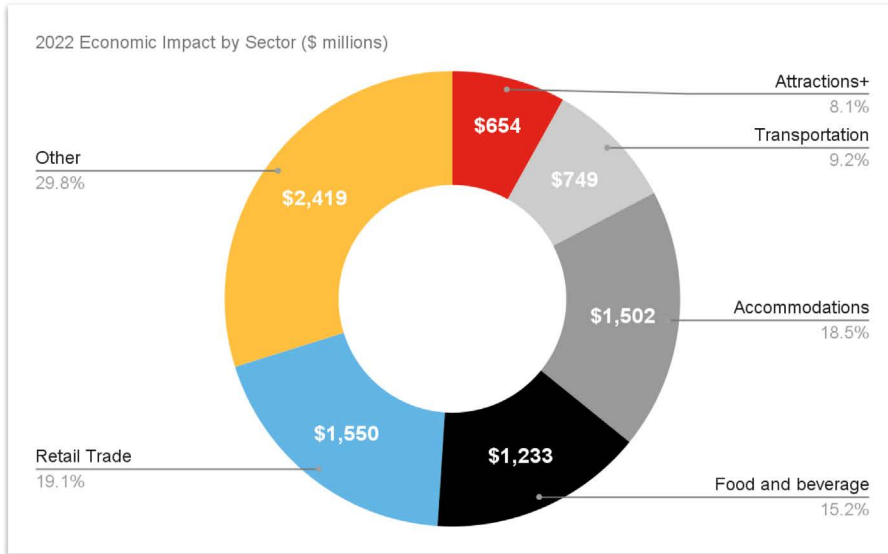
A healthy tourism sector is vitally important for related industry segments, such as arts and culture, major events, restaurants, retail, and all types of engaging activities enjoyed by residents and visitors alike. Post-pandemic, cities across the world are working to reanimate their cores as the establishment of remote working as an ongoing employment feature challenges vitality. The segments supported by tourism are amongst the biggest contributors to such vitality, are central to recovery, and are a critical advantage as cities compete to provide the most favourable environments for work, play, and investment.

In 2022, well prior to full recovery, visitor spending contributed \$654 million to attractions, including theatre, live music, major festivals, and sporting events. It contributed \$1.2 billion to restaurants and dining, and \$1.5 billion to retail, supporting the vibrant streetscapes and unique experiences that engage residents, draw graduates and businesses, and drive a virtuous circle that makes Toronto one of the top destinations for visitors in Canada. As tourism recovers, it enhances recovery for all of these related segments.

“...continue with initiatives developed to support main streets and small businesses to recover from the impacts of the pandemic and to help restore Toronto’s cultural sector and vibrancy.

- Economic Development and Culture Division Strategic Directions 2022-2023
1. Recover and Renew - Advancing Economic and Cultural Recovery and Renewal

Economic Impact: Toronto



\$8.11B

Total estimated economic impact 2022

N.B. Accommodation data includes hotels only and excludes short-term rentals.

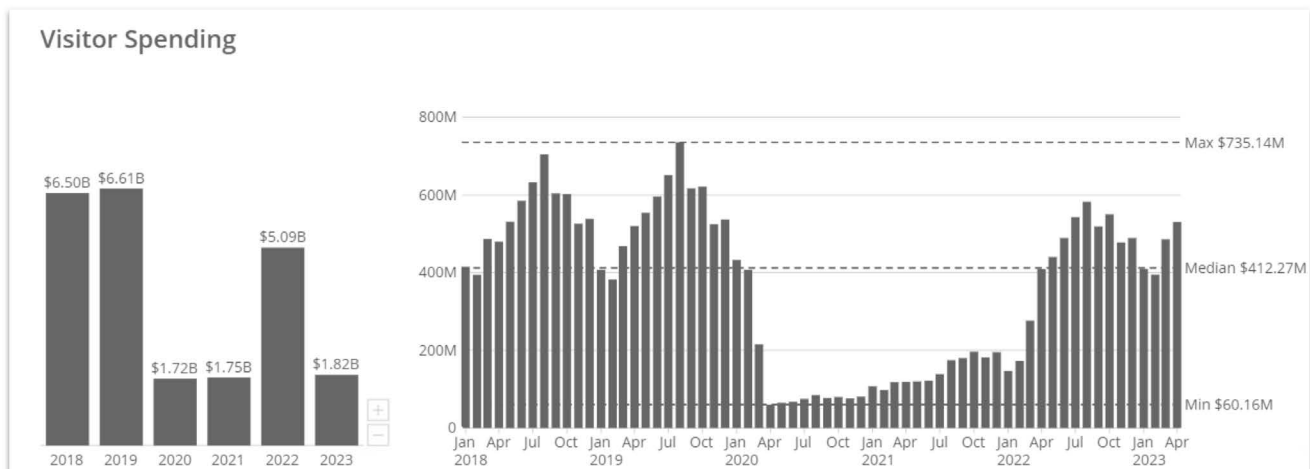
The 'Other' segment includes services supporting core tourism-related sectors such as insurance, legal services, grocery, and gas.

Source: Destination Toronto

As it emerges from the pandemic, the industry faces ongoing challenges. As examples, a shortage of workers in hospitality is resulting in service-level challenges, and high fuel prices have impacted travel costs. In addition, there are considerable disruptions in supply chains, inflation is at a 40-year high, interest rates have risen, and airlines and airports struggle to meet demand.

The chart below shows that, while recovery is occurring, the industry is not yet at pre-pandemic levels. The chart also reveals seasonal challenges to tourism revenues that require support in the future.

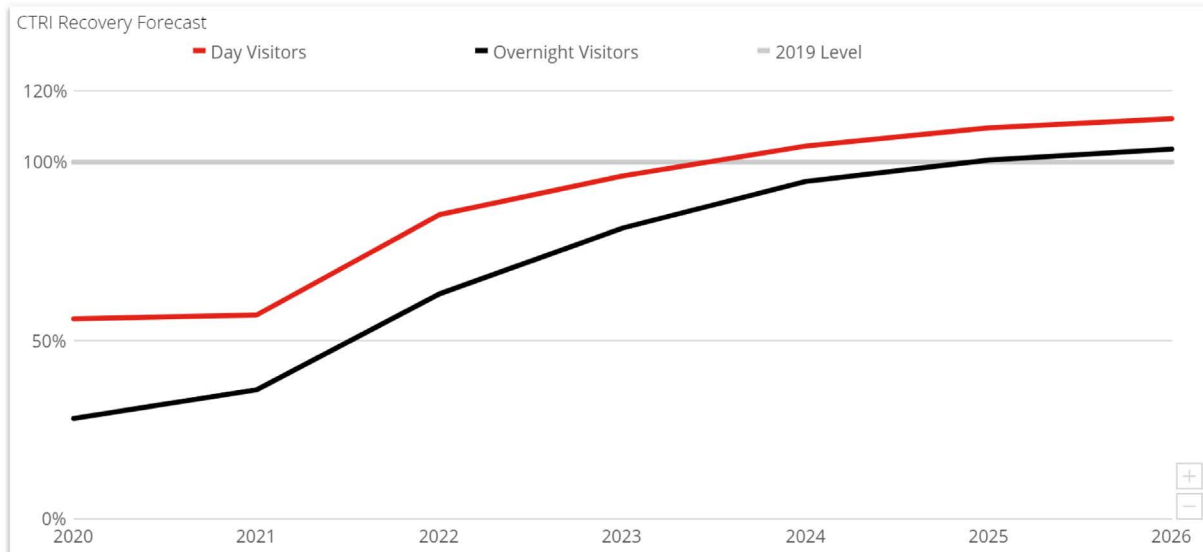
Total Visitor Direct Spending: Toronto



Source: Destination Toronto

Toronto, Ontario, and Canada are all projected to recover to 2019 levels by 2025, and to demonstrate steady growth thereafter.

CTRI Recovery Forecast: Toronto



Source: Destination Toronto

Toronto's recovery will experience a strong boost from hosting part of the 2026 World Cup. The city and region will benefit from global media attention and positive economic and cultural benefits that will sustain COVID-19 recovery in hard hit sectors, including tourism, hospitality, and entertainment.

Projected benefits of hosting five matches in Toronto include:

- Estimated \$307 million in GDP impact
- 3,300 jobs
- 174,000 overnight visitors;
- 292,000 room nights generating projected Municipal Accommodation Tax (MAT) revenues of \$3.5 million⁶

⁶<https://www.toronto.ca/legdocs/mmis/2022/ex/bgrd/backgroundfile-228149.pdf>

Immigration Outlook and Effects on Tourism

In the 2023–2025 Immigration Levels Plan, Canada aims to welcome from 410,000 to 505,000 new permanent residents in 2023, from 430,000 to 542,500 in 2024 and from 442,500 to 550,000 in 2025. These new permanent residents will make Toronto more diverse, draw visitation, and with effective outreach and training, become part of Toronto’s hospitality workforce.⁷

When looking at the overall labour force Tourism HR Canada points out that the tourism industry tends to employ a greater share of visible minorities.⁸

Ontario statistics from the 2021 Canadian census:

	Total Industry	Tourism Sector
Total employment	6,492,890	480,205
15 to 24 years	11.1%	25.7%
Immigrants	32.6%	31.5%
Indigenous identity	2.5%	2.7%
Total visible minority population	33.9%	39.6%

⁷ <https://www.canada.ca/en/immigration-refugees-citizenship/corporate/publications-manuals/departmental-plan-2023-2024/departmental-plan.html>

⁸ [Tourism HR Canada | RH Tourisme Canada](#)



Credit: Baque de Bamba performing at East York Civic Centre

A NEW REALITY

The problems experienced by the travel and tourism sector worldwide have highlighted the visitor industry and its importance to global economies. However, the hiatus from travel resulting from the pandemic has forced new conversations.

The industry, along with community leaders, has identified a shift to more responsible travel with a focus on socio-environmental factors supporting a greater interest in the wellbeing of communities and residents versus visitation growth and profits as the primary goal of tourism.

In addition, the industry is seeing specific demand-side trends and priorities emerge. There is greater consumer interest in Indigenous tourism, outdoor and nature-based activities, health and wellbeing experiences, affluent and retiree travel, and opportunities to work remotely. The need for more frictionless

travel supported by enhanced technology and increased accessibility to welcome people of all abilities has also been identified. Competitive destinations are creating well-balanced, well-funded tourism and travel recovery strategies designed to navigate the build-back of their respective tourism economies effectively.

On the supply-side of the equation, many destinations are adopting a regenerative tourism approach that strives to create an ecosystem of innovation, collaboration and adaptation that energizes strong economic growth, thriving operations, sociocultural vibrancy, healthy people, and a natural environment for generations to come. This approach draws on the United Nation's Sustainable Development Goals, which were developed as a blueprint and call to action for all nations to achieve a more sustainable future for the planet.

⁹UNWTO Sustainable Development Goals: <https://www.unwto.org/tourism-in-2030-agenda>

The priorities outlined within Tourism Services' strategic directions are aligned with several of the Sustainable Development Goals, including:

- SDG 8: Decent Work and Economic Growth
- SDG 11: Sustainable Cities and Communities
- SDG12: Ensure sustainable consumption and production patterns

Regenerative tourism is about guiding and supporting tourism development with an equal focus on economics and the well-being of people and places to measure success. Through this lens, tourism becomes a tool that helps revitalize communities and their way of life and adds economic, sociocultural, and environmental value by:

- Ensuring travel and tourism deliver a net positive benefit to people, places, and nature and support the long-term renewal and flourishing of social-ecological systems.
- Shifting away from the traditional approach where tourism is layered atop communities and nature. Instead, tourism is co-designed with and for communities and nature from the bottom up. In the process, tourism operations, locals, communities, and governments benefit by building deeper connections and respecting the unique places in which tourism is created.
- Adopting a whole systems approach to tourism planning and development where the give back is more than the 'take from' a destination or place.

These factors are fundamental tourism shifts to monitor and respond to in 2023 and beyond.

“Further, several programs and partnerships apply across the city with a focus on ensuring that they extend to neighbourhoods outside the core and to Indigenous, Black, and equity-deserving artists.

**- Economic Development and Culture Division Strategic Directions 2022-2023
4. Grow and Promote Toronto's Cultural Vibrancy - Enhancing Supports to Foster Arts and Culture**



Adapting to Toronto's Changing Tourism Landscape

Historically, Tourism Toronto, now Destination Toronto, was a member-driven organization focused on destination marketing regionally, nationally, and internationally, with their primary focus being the hospitality businesses that formed its membership. In this landscape, to complement the pre-visitation activities of Destination Toronto as a destination marketing organization, it was optimal for the City of Toronto Tourism Services Unit to focus on providing information to tourists in Toronto after arrival, regarding wayfinding and local events to enhance their experience while here.

Destination Toronto has undertaken dynamic strategic change, and the new mandate has expanded to include more than the traditional member-centric destination marketing focus. Their website states, "Destination Toronto's mandate is to reflect the breadth and diversity of Toronto's people, places and culture to inspire residents and visitors to meet, visit and explore our city."

Additionally, Destination Toronto has joined with Toronto Global and the Toronto Region Board of Trade to form Toronto Inc., with a mandate "to elevate the Toronto Region's story globally and drive awareness and business to the city". This work requires the close and strategic partnership of the City of Toronto, specifically Economic Development and Culture and the Tourism Services Unit, to provide municipal services that support destination alignment.

The City of Toronto has likewise launched or is developing initiatives and strategies that relate to tourism and the visitor economy, such as [Night Economy](#), [Cultural Districts Program](#), Event Hosting Strategy, a regional [Esports Strategy](#), and [International Affiliates Program](#). Additionally, the City's corporate strategic priorities have significant intersectionality with tourism, such as the [Reconciliation Action Plan](#), [Toronto Action Plan to Confront Anti-Black Racism](#), [Multi-year Accessibility Plan](#),

[Transform TO Net Zero Strategy](#), and the [Poverty Reduction Strategy](#).

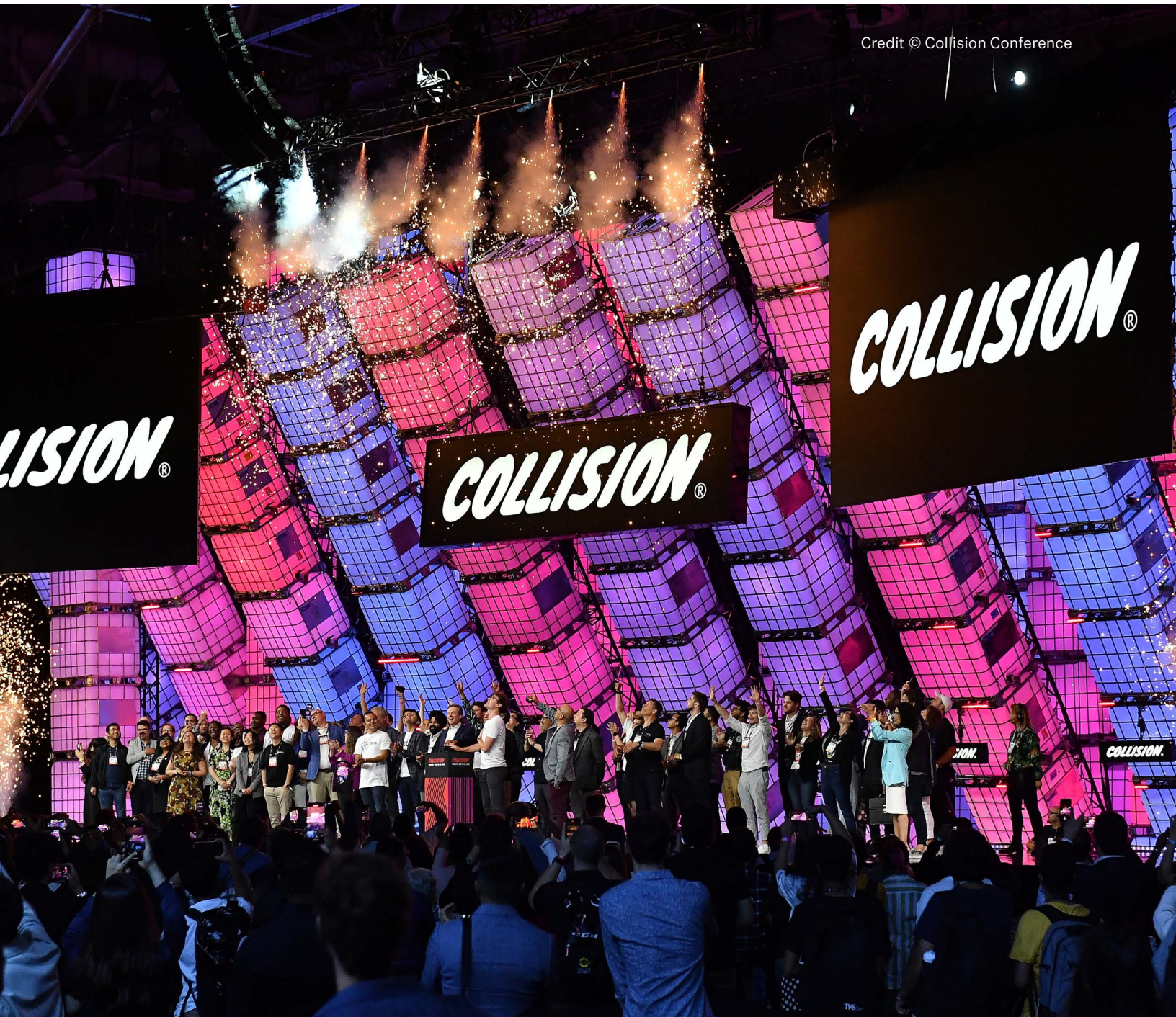
Sector development in Tourism Services has the opportunity to proactively ensure the tourism industry participates in and supports these strategies, and that the industry fully benefits from these and future strategies. This broader strategic lens will more fully leverage the municipal government's capabilities and assets, thereby ensuring the City supports the objectives of the tourism industry, and that tourism likewise supports the City's objectives for local investment and vibrancy.

With evolution in both organizations, the opportunities for Tourism Services and Destination Toronto to collaborate have never been greater. Both organizations are embracing this potential and working together towards distinct and complementary mandates and objectives. To date, this is resulting in Board and Committee participation, formalized collaboration on planning, and much more connection on a day-to-day basis. Additionally, all industry partners are coming together to prepare for the opportunities presented by the upcoming 2026 FIFA World Cup games in Toronto, and are responding to challenges related to competitive government support and needs for updated convention infrastructure and more hotel space, among other issues. Tourism Services' new strategic directions reflect the strong and growing partnership that will enable the industry to succeed collectively.

Working with Destination Toronto and other tourism partners, Tourism Services can make a foundational contribution to responsibly rebuilding and growing Toronto's visitor economy, ensuring it not only provides a world class experience for visitors, but that in alignment with City strategies, it expands economic opportunities and cultural vibrancy for the people, communities and businesses that call Toronto home.

“ Supports for workforce development activities within creative industries have adopted a focus on Indigenous, Black and equity-deserving communities, involving wrap-around training, specific skills training, and job placements, accomplished with partnerships from community groups, unions and employers.

- Economic Development and Culture Division Strategic Directions 2022-2023
2. Increase Toronto's Global Competitiveness - Attracting and Supporting Businesses, Entrepreneurship and Sector Development



PLANNING CONTEXT

In response to the globally felt shifts in approaches to tourism, the United Nations World Tourism Organization (UNWTO), the World Travel & Tourism Council, Destinations International, Destination Canada, the Tourism Industry Association of Canada, and others produced studies which supported the sector's understanding and response to changes to the travel and tourism ecosystem.

The findings from these studies were beneficial to preparing the Tourism Services Strategic Directions Report. Particularly informative studies include Destination Canada's Tourism's Big Shift report, and their recently released 2022-2032 Strategy for Recovery, UNWTO Tourism and the Sustainable Development

Goals – Journey to 2030, along with the 2021 Futures Study conducted by DestinationNext on behalf of Destinations International. Information from the DestinationNEXT report also prompted valuable discussions between the City of Toronto and Destination Toronto on destination alignment.

Destination Canada has identified six regenerative tourism wealth and wellbeing outcomes, which inform the strategic directions recommended for the Tourism Services Unit going forward. By embracing a regenerative approach, the City of Toronto will help ensure healthy communities and a more profitable and resilient tourism sector over time.

Destination Canada's Sector Outcomes for Long-term Resilience – 2022-2032 Wealth and Wellbeing Outcomes:¹⁰

1. Tourism businesses prosper, are deeply rooted in, and generate wealth for communities.
2. Tourism jobs are coveted and inclusive of diverse people and geographies.
3. Local cultures thrive, and guests feel welcome.
4. Tourism contributes to ecological abundance and the rebalancing of the carbon cycle.
5. Indigenous peoples have agency over the potential of tourism to enhance their lives.
6. Guests feel enriched by experiences that distinguish Canada in the world.

¹⁰ Destination Canada. Canada's Tourism Renaissance, Our Strategy for Recovery. July 2022. https://www.destinationcanada.com/sites/default/files/archive/1641-Canada%27s%20Tourism%20Renaissance%3A%20Our%20Strategy%20for%20Recovery/PlainLanguageStrategy-ShortForm_EN-Jun21-accessible.pdf



The Visitor Economy

The World Travel and Tourism Council (WTTC) defines visitor economy as any direct, indirect, and induced economic activity resulting from visitors' interactions with a destination outside their usual environment.

In perceiving this industry as one that has reciprocity between the destination and the visitor at its heart, with benefits to both that are defined by Toronto's identity and aspirations, we expand the focus from 'Tourism' to the 'Visitor Economy'.

This broader view of tourism and its impacts goes well beyond the economic and employment impacts of tourists in Toronto for leisure or business travel. It suggests an entire economy made up of visitors of all kinds, including family from abroad, temporary or remote workers, those engaging in cultural, knowledge, or business exchange or investment, and many more.

The visitor economy prioritizes community, reconciliation, environmental stewardship, alongside economic growth, and job creation. It is an enabler of Toronto's global ambitions.

In defining the visitor economy:

The important distinction is between the person-centred concept of a 'tourist', which is defined to allow the measurement of the economic activity of that person, and the place-centred concept of the 'visitor economy', which is concerned with the whole environment within which tourists, and other visitors, act. The value of thinking about the visitor economy is that it legitimises, and gives coherence to, a policy interest in all of the areas identified above: the things that attract visitors; the infrastructure that supports their visit, and; the services provided to them.

In thinking about the visitor economy, the starting point should be the quality of experience that we provide, but the scope of our interest is not limited by the need to define who is or is not a tourist at any point in time; it therefore embraces both tourists and non-tourists. The quality of the visitor economy matters to tourism and to tourists, as well as to visitors more generally. It also matters to the wider economic and social success of the destination and the region. High quality places help to attract and retain higher level, more economically productive businesses and workers, as well as being attractive to visitors.¹¹

To signal the shift in focus, and to ensure accountability for leveraging the full potential of a year-round visitor economy, it is recommended Tourism Services be renamed the Visitor Economy Office.

¹¹ Destination Toronto OR <https://www.culturehive.co.uk/wp-content/uploads/2020/10/Understanding-the-Visitor-Economy-1.pdf>

VISITOR ECONOMY STRATEGIC DIRECTIONS 2023-2028

The Visitor Economy Strategic Directions detail the priorities over the next five years, taking into consideration the challenges and shifts in focus resulting from the pandemic. In addition to advancing local industry-building and community vibrancy, the strategic directions will also support the sector regaining its status as a leading visitor destination.

Building on the 2022-2032 Wealth and Wellbeing Outcomes from Destination Canada, the strategic directions will encourage sustainable growth and industry workforce development initiatives that attract and retain employees representing Toronto's diverse population. The directions will support and encourage opportunities for local cultures and communities to thrive, create an environment where visitors are made to feel welcome, and Toronto's diversity is celebrated. Tourism development will take into account ecological impacts inclusive of the carbon cycle. Indigenous people will be engaged through self-determined processes, in offering tourism opportunities that introduce visitors and residents to Indigenous communities and culture. And, overall, visitors will have a remarkable experience in Toronto.

In addition, the strategic directions strive to leverage the opportunities Toronto has to create meaningful and sustainable experiences for visitors and residents throughout the year. As one primary example, hosting the 2026 World Cup will bring global media attention

and positive economic and cultural benefits to the City that will strengthen industries hard-hit by COVID-19, such as hospitality and tourism, and leave a legacy for communities. From this opportunity alone, projections suggest a \$307 million GDP impact and 3,300 jobs¹², in addition to community-building projects and experiences for residents and an infusion of vitality into Toronto's global identity.

In advancing the visitor economy in Toronto, to support destination alignment the Visitor Economy Office will prioritize actions best accomplished using the unique assets and capabilities of municipal government. This will ensure the City makes a unique and additive contribution that allows the sector to benefit from the greatest strengths of each contributor. Destination alignment occurs when all entities involved in the overall management of a destination (both formally and by association) work together towards common goals. In the past, many organizations in Toronto have been involved in destination management, whether by their organization's mandate or because of the scope of their work. While these organizations have consulted each other and even partnered on various initiatives, the jurisdiction lacked a cohesive approach to overall destination management. The City is a common denominator for entities in this space, is deeply engaged with key industry organizations, and so can play a supportive role in advancing alignment.

¹²<https://www.toronto.ca/legdocs/mmis/2022/ex/bgrd/backgroundfile-228149.pdf>

“Toronto has been an important site for gathering, trading and celebration for Indigenous People for thousands of years and continues to be home to many diverse Indigenous Peoples, whose artistic and creative contributions are vital to the fabric of the city.

- Reconciliation Action Plan
16. Celebrate Indigenous Arts and Culture

Credit © Destination Toronto



To that end, the Visitor Economy Strategic Directions have three broad strategic priorities that will translate into annual action/work plans:

Strategic Priority 1: Provide a Gateway to Municipal Services and Support Destination Alignment

This strategic direction, based in partnership and reciprocity, will be implemented in three ways.

i) For industry partners, the Visitor Economy Office will be their point-of-entry and champion as they access the assets and services of municipal government.

The Visitor Economy Office will engage proactively with industry to understand its needs, determine if the City can help, and if so, which services, tools, or mechanisms can be leveraged within EDC or elsewhere to create the best outcome. The Office will work with industry to navigate processes, advocate, create solutions, and achieve best outcomes through the pragmatic use of municipal government assets. This could include inter-governmental advocacy, leveraging the City's convening power, initiating or influencing policy, strategies, or other City initiatives in ways supportive to these sectors, or support with practical issues such as permits, access to space, or business supports.

ii) For City Divisions, the Visitor Economy Office will be a knowledge centre and source of expertise and engagement regarding all aspects of the visitor economy, helping the City to more fully understand its economic and social value, current industry challenges and opportunities, and how the industry can be considered when the City is developing relevant policies, programs, strategies, or initiatives.

As a major industry in Toronto (\$10 billion annual impact pre-pandemic) that drives economic, employment, social, and cultural benefits, the needs of tourism and the visitor economy should be considered at an early stage in the development of City policies, planning, strategies, and initiatives across Divisions. The Visitor Economy Office will take a proactive approach to ensuring City Divisions benefit from expertise and a deeply informed perspective in matters pertaining to this sector so the industry, the City, and the shared goals of both are well served.

iii) The Visitor Economy Office will find and leverage opportunities for these sectors to be engaged in the achievement of relevant City strategies, and for the development of those strategies to better serve the industry.

City strategies and other initiatives such as the [Reconciliation Action Plan](#), [Toronto Action Plan to Confront Anti-Black Racism](#), [Night Economy](#), [Cultural Districts Program](#), [Toronto's Music Strategy](#), and the [International Alliances Program](#) are intersectional with the visitor economy. Where shared goals exist, industry and City actions to achieve them can be distinct but mutually reinforcing. Strategically leveraging the unique strengths of the visitor economy (industry and community) and the City to accomplish shared goals will lead to City priorities being achieved in a manner that benefits the city as a whole, enacting a 'community-first' approach to tourism.

Adopting a regenerative approach, the Visitor Economy Office will contribute to the advancement of destination alignment, and enhance City engagement with these sectors by undertaking the following actions:

- Become the voice of Toronto’s municipal government with the tourism sector. Improve service to tourism and visitation by facilitating connections between tourism entities and City of Toronto Divisions, Sections and Units to provide strategic advocacy and support, along with effective, and expedited solutions, advice, and action for tourism issues and opportunities that involve the City.
- Become the voice for the tourism sector within City Hall. Serve as an advocate and knowledge-centre to ensure tourism-related opportunities, issues and challenges are considered at the appropriate stage of policy or program planning and ensure the perspective of the industry is considered in relevant City undertakings. Where appropriate, encourage and inform advocacy on behalf of the tourism industry to other levels of government.
- Expand tourism and visitor economy’s focus on sector development by ensuring appropriate skillsets and knowledge base exist on the team, and by innovating sector development initiatives in which the City can be uniquely effective.
- Identify opportunities to work with industry partners in support of workforce development and promote tourism as a career path, with a strong emphasis on inclusive prosperity, equity, accessibility, and diversity.
- Working with partners, use the City’s convening power to support destination alignment by bringing diverse groups together to work towards a cohesive and collaborative approach to optimizing Toronto’s tourism and visitor ecosystem.
- Support partners and advance destination alignment through participation on boards, working groups and committees where appropriate.
- Continue to collaborate and identify new opportunities with key industry partners for the delivery of visitor information services.

“The City acknowledges Indigenous People experiences in the city due to displacement, intergenerational trauma and ongoing oppression and the need to improve economic well-being and prosperity.

**- Reconciliation Action Plan
20. Improve Indigenous Economic Development**



Credit © Herculina Arts Collective performing at Artscape Weston Common

Strategic Priority 2: Connect to Communities through a ‘Locals-first’ Approach

The visitor economy plays an important role in supporting the building of local communities by adding, expanding, and improving amenities and attractions to the destination that not only appeal to visitors, but also increase the quality of life for residents. On any given day, there are between 50,000 – 100,000 visitors in Toronto, supporting the economic viability of amenities and attractions that enhance the livability of the city for everyone.

Tourism and the visitor economy also contribute to the growth of Toronto-based industries through the strategic attraction of conferences, conventions, and other events that lead to new business relationships, knowledge sharing, the creation of partnerships, promotion of local industry excellence, building local capacity, and foreign direct investment. The industry also supports the sustainability of jobs and

small businesses across cultural sectors such as theatres and live music venues, as well as in main street retail, restaurants, entertainment, and other hospitality businesses.

While mutually beneficial outcomes are an inevitable result of tourism, the Visitor Economy Office can more intentionally leverage them to achieve City objectives. The Visitor Economy Office will work within the City and with industry externally to fully leverage the benefits this sector can provide to residents and businesses across the city. By taking a ‘locals-first’ approach to tourism and assessing how it impacts residents, we see a shift towards sustainable tourism goals, filtered through a lens of resident quality of life, inclusive economic prosperity, and sociocultural vibrancy.

To facilitate a ‘locals first’ approach, actions to be undertaken by the Visitor Economy Office include:

- Advance reconciliation, equity, and inclusion by ensuring Toronto’s diverse communities, their festivals, cultural events, and businesses are linked to visitors, and that visitors are connected to opportunities to engage with Toronto’s diverse culture in the neighbourhoods where it thrives.
- Work with partners to support workforce development programs with a strong focus on diversity, equity, and inclusion, lowering barriers to employment opportunities related to tourism to advance a more inclusive hospitality workforce.
- Support partners’ workforce development initiatives using the City’s assets to attract participants to this sector in alignment with Economic Development and Culture’s inclusive economic development strategic direction.
- Leverage the City’s expertise and knowledge in environmental stewardship to support a climate-positive approach to tourism, as demonstrated through the City’s engagement in the Global Destination Sustainability Index in partnership with Destination Toronto.
- Consult and collaborate with Indigenous Treaty and Territorial rightsholders, urban Indigenous service providers and organizations, and the City of Toronto Indigenous Affairs Office regarding tourism-related opportunities in support of Indigenous-led approaches to tourism destination management. Leverage City initiatives that support Indigenous placemaking and business growth and amplify Indigenous-led tourism activities and initiatives that inform and educate visitors of Toronto’s Indigenous culture while providing economic benefit to those involved.
- Consult with diverse community groups, other EDC Sections such as Business Growth Services, Arts and Culture Services, Museum and Heritage Services, along with diverse community groups, Business Improvement Areas, and other hyper-local organizations to ensure a broad spectrum of perspectives are represented as the Visitor Economy Office pursues actions in support of City strategies.
- Work with other EDC Sections and the City’s key business partners, such as the member entities of Toronto Inc., to support an aligned approach to business development for priority sectors through the attraction of conferences, conventions, and events, ensuring local industry can engage to achieve lasting benefits, as has been demonstrated through previous collaborations related to Esports.

“The City acknowledges that self-determination necessitates the creation of avenues and opportunities for Indigenous Peoples to be directly involved in decision-making at various levels, places and spaces at the City of Toronto.

**- Reconciliation Action Plan
7. Enhance Indigenous Civic Engagement**

Strategic Priority 3: Connect to the Visitor to Enhance Access and Experience

Visitors are increasingly looking for ways to feel connected to the destination they have chosen to travel to. The connection to the destination can start before the visitor arrives, through websites and social media. Once arrived, in-person interaction with visitor information service providers becomes important, in addition to digital or interactive technologies. Some visitors are not comfortable depending solely on digital information on their mobile device when navigating a new city, and access to informed in-person support can be invaluable. The information a visitor receives in the destination will influence the overall experience for the visitor as well as the radius of economic impact for businesses and communities.

Historically, Tourism Services was the primary provider of materials, locations and staff that connected with visitors, primarily through TTIC and Info-to-Go. By offering these services on an in-person basis, staff have been able to respond to unique visitor needs such as accessibility, the need for low-cost accommodation, or free events. Additionally, staff have offered awareness of off-the-beaten path experiences or smaller attractions, with visitors returning for more advice because they appreciated tips from a local. Through the Info-to-Go mobile kiosk program, staff have connected with both residents and visitors across the city to encourage deeper engagement with all Toronto has to offer. In doing so, these programs contribute to experiences of Toronto that are meaningful and memorable.

For those who are comfortable using it, technology is moving the travel sector to a place of seamless travel experiences with minimal pain points. Innovative destinations use digital technology to increase connection, facilitate accessibility, improve security, and drive a better visitor experience. The Visitor Economy Office will work with partners to support this beneficial digital adaptation while at the same time preserving valuable in-person services.

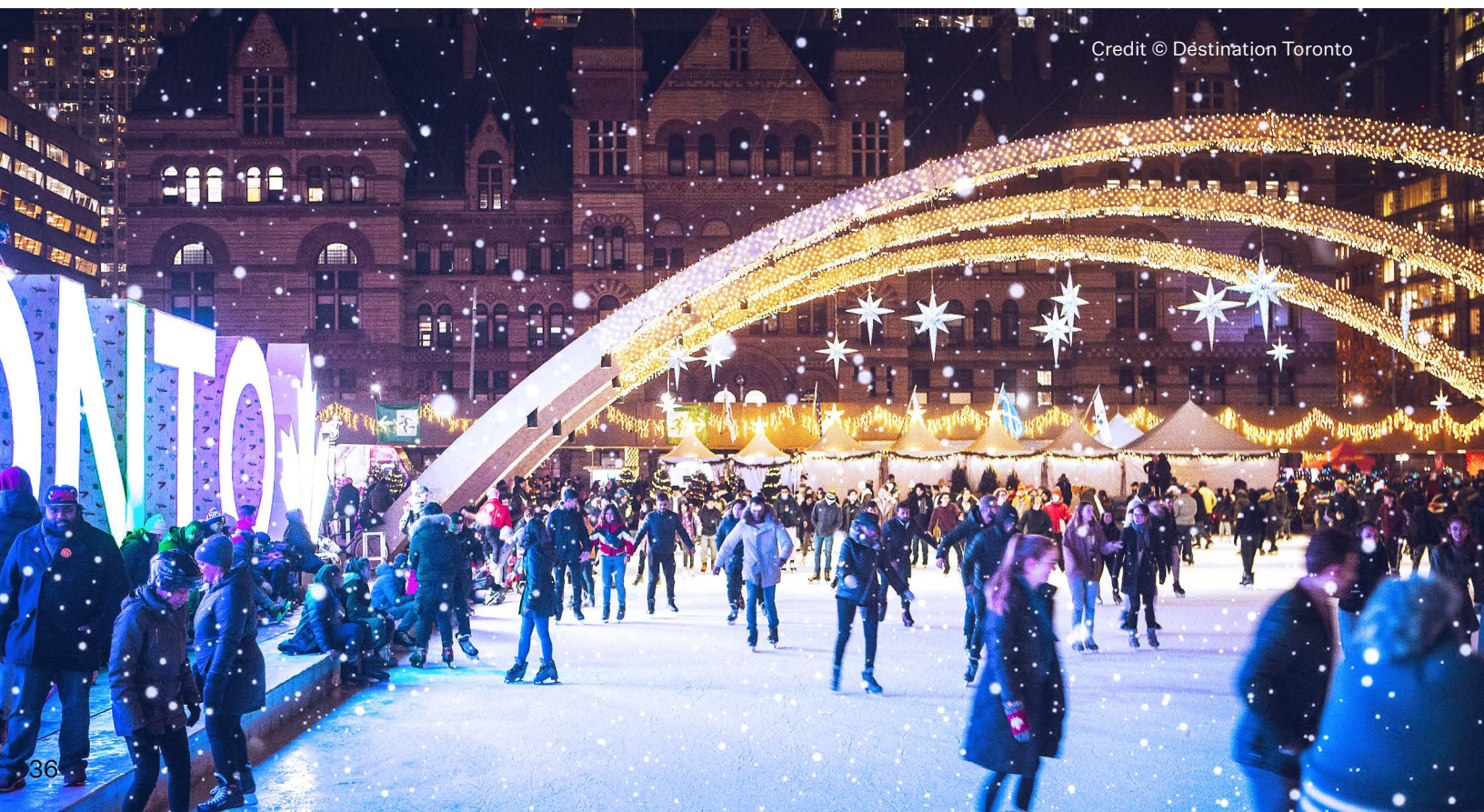
Building on the unit's established capability, the Visitor Economy Office will undertake the following actions:

- Explore the most effective and efficient ways to provide visitor information services (in-person and technology-based), including partnership models for delivery of services. Consider adjustments to existing services, such as Info-to-Go, to improve alignment with City strategies.
- Enhance promotion of key information services, such as TTIC and Festival and Events Calendar to improve their outreach and impact.
- Identify ways to ensure businesses that interact with visitors have access to information they need to support visitors.
- Explore ways to ensure members of the local tourism industry have the information, training, and tools they need to inform visitors about Toronto and help drive positive visitor experiences.
- Secure an ongoing understanding of the visitor's experience; obtain feedback related to Toronto's tourism market readiness, quality of visitor services, breadth of products and experiences, and infrastructure gaps.

CONCLUSION

The Visitor Economy Office will build upon past programs and expertise while at the same time embracing a new approach that is ‘local first’, and founded in sustainability, community, creativity, and prosperity. By leveraging the unique assets and capabilities of the municipality, the City will make a singular and powerful contribution to supporting these sectors in a way that benefits Torontonians and visitors. By embracing more dimensional thinking regarding the parameters and potential of tourism and the visitor economy, the City can create more meaningful and durable outcomes for business, culture, the industry, and Torontonians throughout all four seasons. With greater focus on the reciprocity between destination and visitor that is at the heart

of the strategic directions in this report, the Visitor Economy Office will be better positioned to serve broader City priorities, such as the [Reconciliation Action Plan](#), [Toronto Action Plan to Confront Anti-Black Racism](#), [Night Economy](#), [Cultural Districts Program](#), and many more. The changed landscape has done much to enrich the partnerships and destination alignment needed for the City, and each of its partners to fully contribute to Toronto’s success. In fact, the destination cannot succeed if partnership is not at the heart of every action. Toronto as a city and as a destination has never been more ready to realize the possibilities a ‘local first’ and partner-driven approach can achieve, which is at the heart of the Visitor Economy Strategic Directions Report.



Credit © Destination Toronto

APPENDICES

Appendix I – Tourism Services Review Process

The delivery of a relevant and effective Tourism Strategic Directions report required a comprehensive review process. Five overarching steps guided the services review process:

1. **Analysis of Relevant Reports, Plans, and Studies**
2. **Analysis of the Current Tourism Services' Programs**
3. **Six-City Jurisdictional Review**
4. **Nineteen Industry Interviews**
5. **Industry Surveys**

1. Analysis of Relevant Reports, Plans, and Studies: A review of tourism industry reports, plans, and studies from international and domestic tourism organizations. Reports were sourced from the United Nations World Tourism Organization, the International Tourism Council, Destination Canada, Tourism Industry Association of Canada, Canadian Tourism Human Resources Council, Tourism Industry Association of Ontario, and others.

2. Analysis of Current Tourism Services Programs: As an essential step in the process, the third-party review of the current Tourism Services Unit programs was set against the backdrop of emerging trends within the tourism sector, visitor and resident travel behaviours, and ramifications of the global pandemic. The programs reviewed included:

- Toronto Union Station Tourist Information Centre
- INFOTOGO Visitor Information Centres
- We've Been Expecting You Program
- Online Festivals & Events Calendar
- Workforce Development

3. Jurisdictional Review: A six-city jurisdictional review was conducted to gain an understanding of how other tourism destinations operate in the context of tourism services provided by the City/Municipal Government and the Destination Marketing/Management Organization (DMO).

A review of DMO and municipal websites was conducted. A review of available and relevant reports, plans or studies was also conducted. For example, tourism strategies, marketing plans, or destination development/management plans posted on the websites. The desk-based research was followed by one-on-one virtual interviews with a senior official from the city's DMO. The DMO representative was best suited to provide an accurate perspective of the situation in their city. The jurisdictional review included the following six cities:

- London – London & Partners
- Berlin – Visit Berlin
- New York – New York & Company
- Chicago – Choose Chicago
- Ottawa – Ottawa Tourism
- Montreal – Tourism Montreal

4. Industry Interviews: Nineteen sixty-minute virtual or telephone interviews were conducted with senior staff from tourism businesses, organizations, and government entities to gain perspective from Toronto-based tourism sector partners. Interviews followed an approved discussion guide and probed awareness and usefulness of current Tourism Services Unit programs. The discussion included gathering the interviewee’s thoughts on new programs and activities the Tourism Services Unit might consider over the next five years.

Destination Ontario	Toronto Attractions Council Board Members	Toronto Alliance of Performing Arts	Economic Development and Culture: <ul style="list-style-type: none"> • Arts, Culture Services • Program Support • Museums, Heritage Services
Destination Toronto	Metro Toronto Convention Centre	Hospitality Workers Training Centre	Toronto Association of Business Improvement Areas
Tourism Industry Association of Ontario	Mississaugas of the Credit First Nation	Ontario Tourism Education Corporation	
Ontario Restaurant Hotel & Motel Association	Canadian National Exhibition	Humber College	
Greater Toronto Hotel Association			

5. Industry Survey: An online survey was initiated in July 2021 to gain a broader perspective of the Tourism Services Unit services from tourism industry partners. The survey was sent to 400+ individuals who, through various connections, could have knowledge of or have used the tourism services offered through the Tourism Services Unit over the past several years. The Tourism Services Unit database was up to date when the survey was issued; however, given the effects of the pandemic, it was unknown if the targeted business still employed individuals contacted. The online survey was administered through the cities CheckMarket survey platform. Fifty-one individuals responded to the study; a 12% response rate was achieved.

The survey identified the respondent’s sector affiliation, role, and primary business source (resident, Ontario, US, international). In addition, the survey probed familiarity and use of each tourism service, intent to use the service in the future, and insights related to future tourism services programs the Tourism Services Unit might offer.

Weekly status meetings were held with representatives from the Tourism Services Unit and the consultant throughout the review process.

Appendix II – Tourism Services Review – Findings and Observations

The culmination of the tourism services review process described above led to identifying a collection of findings and observations for each of the Tourism Services Unit programs.

1. Union Station Visitor Information Centre (VIC) and INFOTOGO Static/Portable VIC – Findings

The Union Station VIC provides information about the things visitors and residents can see and do in Toronto. There is also a line of Toronto merchandise for sale to visitors.

The VIC is a joint venture between the City and Province of Ontario (Destination Ontario). The Tourism Services Unit operates one desk (out of the four desks in the centre) with one Tourism Services Unit staff person present during all hours of operation. Provincial VIC staff provide visitor information about Ontario. The city covers 25% of the operating cost of the VIC, and the province covers the balance.

Visitor interactions at the **Union Station VIC** are tracked daily. In 2019 VIC staff had close to 30,000 visitor interactions, and at the end of 2022 the number of queries had not rebounded to pre-pandemic levels. reopened.



Union Station VIC Interactions	2019	2020*	2021**	2022***
Toronto Consultations	29,620	3,080	474	5172
Ontario Consultations	607	176	18	432
Emails and Phone Calls	367	81	17	196
TOTAL	30,567	3,337	509	5800

*2020 Open Jan 2-March 11 | **2021: open October 20 – December 17 ***2022: Open March 16 – December 31.
Stats missing for Dec 30/ 31

The **INFOTOGO VIC** is designed to deliver relevant visitor information at the locations visitors congregate. In 2019 the program consisted of three static trailers at Nathan Philips Square (NPS), Ferry Docks, and Bremner Blvd., and portable kiosks. In 2019 the service operated from late May to late September. Unfortunately, INFOTOGO did not run in 2020 or 2021 due to the pandemic.

INFOTOGO staff distribute a range of visitor materials that promote attractions, festivals, theatres, neighbourhoods, cycling, public transit, restaurants, and family-friendly activities. In 2019, material from approximately 125 different organizations in Toronto and Ontario was distributed.



Staff interact with visitors in two ways; a) casual interactions are brief encounters with INFOTOGO staff, b) in-depth and more extended interactions with visitors seeking guidance and answers to specific questions.

Due to budgetary constraints, INFOTOGO VIC will be paused in 2023.

INFOTOGO Interactions ^[1]				
	2022	2021	2020	2019
Festivals & Events	3172			24,383
Bremner Blvd.	N/A			16,819
Ferry Docks	36,787			47,702
Nathan Philips Square	24,079			60,589
Total	64,038			149,493



Most events INFOTOGO attends occur in downtown Toronto, but INFOTOGO also supports Etobicoke, North York, York, East York, and Scarborough events. For example, in 2019 the TIFF Festival Street saw 3964 interactions, Taste of the Danforth 2503, Pride 1900, Taste of the Kingsway 1823, and the Beaches Jazz Festival 1729 interactions.

Visitor interactions at INFOTOGO locations are tracked daily (May-September). In 2019 the team interacted with almost 150,000 people, including 67,485 casual interactions and 19,034 in-depth interactions. Staff handled an average of 533 interactions per day.

¹ The casual and in-depth totals do not add up to the end of season total as on occasion staff do not break numbers down into these categories, but rather just enter a total number for the day.

Industry Interviews: A variety of perspectives were presented about the VIC services. Several felt the service was an essential part of being a tourist destination. Others believed the VIC was valuable at a point in time but felt the combination of new technology and consumers' familiarity with online tools rendered VICs nice but not a need-to-have service. Many pointed out that theatres, attractions, and other visitor service organizations have either reduced or eliminated their use of printed brochures, moving to digital versions available through their website, eliminating their need to distribute printed brochures at the VIC.

“We value being able to share our materials through the Union Station location.”

“Easily accessible mobile trailers are a great asset to point our visitors towards when we can't answer a specific question.”

“I'm not sure what the value of this would be to us as it is not close to our area”

Survey Respondents

Destination Ontario VIC/Ontario Tourism Information Centre (OTIC) Research
Destination Ontario (DO) surveyed customers who visited an Ontario Tourism Information Centre (OTIC) emailed or called Ontario Tourism for information. Survey data is gathered from those seeking information from April 2018 to February 2020 and included 71,056 in-person survey responses (during an OTIC visit), 838 completed caller surveys, and 121 completed email user surveys. Three percent of those who visited the Union Station OTIC location represented 2,131 survey respondents. Destination Ontario reported the following from those who saw an OTIC:

- 39% were from Ontario, 36% from the US, 12% international, 11% other Canadian provinces
- 50-64 age group was the most represented VIC user; the 18-34 age group was the smallest
- 35% visited the OTIC to get information on what to see and do in the Toronto area
- 31% visited to use amenities (washroom)
- 31% visited to get directions to a specific destination

Destination Ontario also conducted qualitative (focus groups) research in October 2019¹⁴ to inform future planning for the delivery of visitor information services. The study revealed the following:

- All elements of a trip considered important/essential are researched and booked in advance:
 - Transportation, accommodations, big-ticket events
- Most travellers prefer to keep flexibility in their schedules, gathering info from locals to determine what to see and do
- Most use both traditional and online sources of information when in their destination
- To have a valid “local” experience, travellers seek out information once in the destination
- Given the amount of travel information available online, many had never been to a VIC
- The majority will not go out of their way or seek out a VIC

¹⁴Two focus groups (56 participants) were held in each of Toronto, Sudbury, Washington DC, and Detroit in English and in Ottawa in French.

VIC's In Other Destinations

The presence of visitor information centres in other destinations, and the organization that operate them (city government, DMO, others), was part of the jurisdictional review. Of the cities reviewed, all six have some form of visitor information centre.

In New York, Macy's Department Store at Herald Square works the VIC. The permanent VIC in Chicago is operated by the city government. However, the DMO does help offset operation costs. In London and Berlin, (image left to right below), the DMOs operate the VICs. In Montreal, the city government works three permanent VICs, and in Ottawa, Canadian Heritage, and Tourism Outaouais have VICs.

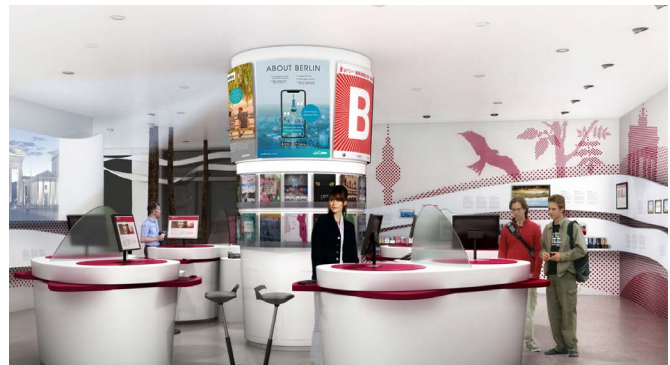


Credit © Molly Flores NYCTourism.com_dsc8155

Locations of the permanent VIC vary in each area. In London and Berlin VICs are in the city centre and transportation hubs like the airports and transit stations. All other destination VICs are in the city centre. (London's St. Paul's VIC, below left, Berlin Brandenburg Airport VIC, below right)



Credit © City of London Information Centre



Credit © visitBerlin.de

Only Montreal and Ottawa operate portable, seasonal VICs. The City of Montreal has a team of travel councillors providing Tourism Services using carrier tricycles, electric scooters, and foot (image right). Ottawa Tourism operates several pop-up VICs at events and major attractions.

During the destination interviews, the DMOs that continue to operate VICs indicated they were reviewing their value, with many looking to technology-based information platforms to service visitors in the future.

¹⁵ Berlin, London, Chicago, New York, Montreal, Ottawa.

Union Station VIC and INFOTOGO VIC – Observations

The following observations emerge after a thorough VIC program review:

- VICs are used by older travellers who may be more comfortable with personal interaction; they also may be less familiar with online tools and technology
- While many tourism operators use or are aware of the VIC, many were not aware the service existed; only half of those surveyed said they planned on using the VIC service in the future
- Provincial representatives indicated they are reviewing the VIC service they offer in the province, including the Union Station location; their research suggests the review is warranted
- All other destinations reviewed have VICs either operated by the DMO and/or the city government; however, those DMOs who operate a VIC are reviewing their future viability
- Industry partners referred to VICs as an “old school” service that may have runs its course, suggesting it is a nice-to-have but not need-to-have service in the future
- Many industry partners believe digital/virtual tools can replace the traditional VIC benefits

2. We’ve Been Expecting You Program – Findings

The **We’ve Been Expecting You** (WBEY) training program is a program designed to engage with local tourism workers and volunteers to help them enhance a Toronto visitor’s experience. It was launched in 2011 as a free in-person customer service and Toronto-specific knowledge training. The WBEY training program expanded in 2015 to an online training platform in advance of the Toronto Pan Am/Parapan Am Games. Developed with Ontario Tourism Education Corporation (OTEC), online training took the learning principles from the in-person curriculum and adapted it to an online format.

Subscribers to the free WBEY program (2,122 as of May 2021) receive a monthly eNewsletter to keep them up to date with what is happening in Toronto so they can pass along “things to do” info to their guests. The program also included a signage campaign that saw the WBEY brand and messaging (Welcome to Toronto, We’ve Been Expecting You) in tourist-centric locations around Toronto.



WBEY in-person training was scheduled to relaunch in 2020 (with a new trainer, refreshed training content and updated images). However, due to the COVID-19 pandemic, all in-person training was paused. Online training continues to be available, though platform hosting with OTEC expired at the end of 2019. As a result, the content for WBEY was migrated to a City of Toronto externally hosted Moodle training platform.

Participation in WBEY training was relatively consistent in 2016-2019. 2019 saw the most significant number of participants since 2016; however, there was a shift to more online and less in-person training. In addition, the pandemic impacted participation in 2020 and 2021.

WBEY Participants	2016	2017	2018	2019	2020**	2021**
In-Person	560	477	302	191	NA	NA
Online	161*	419	482	757	NA	NA
Total	721	896	784	948	155	24

*Online training introduced mid-year 2015.

**COVID-19 has negatively affected 2020 and 2021 participation.

Industry Interviews: Awareness of the programs varied, with about 50% saying they had a good understanding. Many viewed the program as valuable, especially those in the not-for-profit attraction sector. Others believed that the program was beneficial but questioned it as a priority, given all that is needed to build back the industry. Several asked if the WBEY program was a city responsibility as many companies had in-house training or could purchase training programs online from other organizations like Tourism HR Canada.

“There is still a need for such a program. The tourism industry has changed, and many front-line workers have left the sector; therefore, these roles will be filled with inexperienced people who will require basic customer service training; many operators don’t have the resources to do that training.”

“Only 40% have or will return to the sector, so 60% of the hospitality workforce will need to be trained.”

Senior Association Representatives

Customer Service Training in Other Destinations Of the six destinations reviewed, membership based DMOs in Montreal, Ottawa, and New York offer industry training programs.

In Ottawa, the DMO offers training through its Destination Development program. Ottawa Tourism staff deliver this training. Training focuses on tourism product and experience development training.

Under the Bonjour Montreal brand, Tourism Montreal offers the Montreal Specialist Program. The program was created to give Tourisme Montreal members the tools they need to sell Montreal. The program targets tourism business sales managers, marketing managers, information agents and hotel concierges. Participants in the program take a 3-hour online course and participate in a Montreal Specials guided city tour.

In New York, the DMO offers their Tourism Ready program. The program was established to set members up to secure new business by providing tools and techniques for working with global travel trade customers.



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WBEY – Observations

The following observations can be made after a thorough WBEY program review:

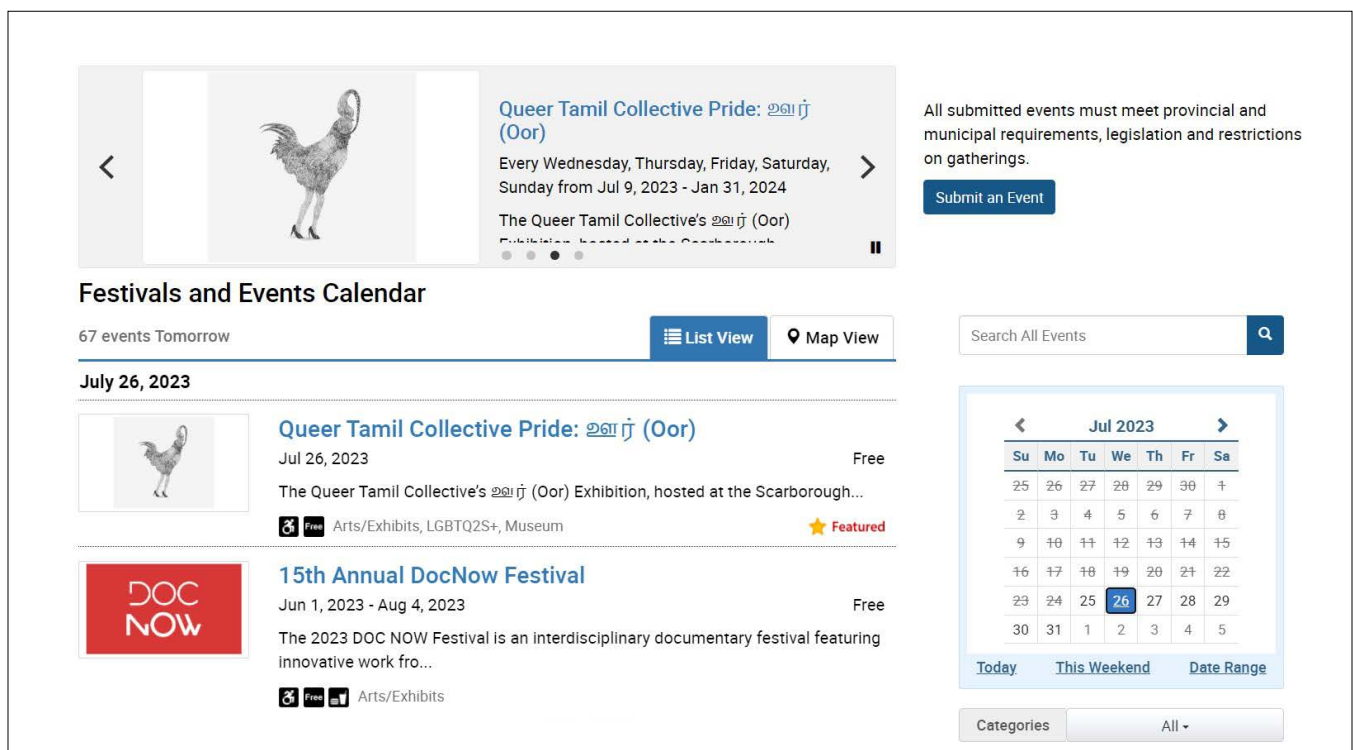
- The WBEY program has been a valuable service that supported the tourism sector by providing training to enhance the visitor experience
- Significant resources are required to deliver a quality and consistent training program
- While WBEY training is fundamental in terms of its content, it proved ideal for some front-line tourism workers who may not understand what it takes to meet customer expectations through basic customer service practices
- WBEY training provides an essential orientation about available visitor experiences, attractions, and services – the program helps put the participant into a tourism service mindset and makes them valued participants of the tourism sector
- The program is a valuable tool for businesses who do not have the resources to deliver customer service and visitor experience training; the program is also a complimentary service which is beneficial to many operators

3. Online Festivals & Events Calendar – Findings

The events calendar promotes festivals, events, and exhibits of interest to residents and tourists. External organizations submit events, and occasionally, Tourism Services staff offer to fill any gaps in publicly accessible information. The events featured include exhibits, live music or theatre performances, street festivals, consumer shows and workshops, walking tours, film festivals, parades, and other events. The current version of the calendar was

released in 2016 and is navigable for the public seeking information and for the administrators managing the backend platform and inputting event information.

The city IT team is currently redesigning the calendar. The plan is to use a new calendar platform for city activities, with the Festival & Events calendar becoming a subset of the more comprehensive, corporate-wide calendar.



The calendar is a no-cost tool for event and festival producers to promote the details of their festival or event. For many years, the city website was logical site residents used to secure event information. In addition, front-line hospitality staff use the calendar to source timely festival and event information to pass along to guests.

A search by date and filter feature streamlines the event search process for end-users. In addition, the map view feature with drop-down descriptors and web links is helpful for users

who may not be familiar with the city or for users who want to see events that are close to their home or accommodation.

There is a comprehensive vetting and approval process that events go through to be included; this ensures legitimate events are promoted, assuring residents and visitors they receive credible information to help inform their decision-making process. In addition, the random or circulating nature that events are listed/posted also ensures no one event receives more profiles than another.

Industry Interviews: Most interviewees, while familiar with the calendar, did not use it. Those who did use it thought it offered an excellent listing of a wide variety of things going on in the city. Several felt visitors would be more drawn to the event calendar on the Destination Toronto website, though some expressed the information it contains is not exhaustive.

“ It’s satisfactory, but the user experience/user interface could do with an update to make it feel more modern.”

“ It is time-consuming to enter information; it is a barrier to putting events up as it feels like an event application.”

“ It’s a great resource. However, the program could be updated.”

Survey Respondents

Festival & Event Calendars in Other Destinations Three of six destinations share the responsibility of publishing events, with both the DMO and city government posting events and festivals on their website (Ottawa, Montreal, New York). In the other three destinations, only the DMO post events listings on their respective websites.

Festival & Event Calendar – Observations

The following observations can be made after a thorough review of the Festivals & Events Calendar program:

- A festival & events calendar is an essential requirement for all tourism destinations
- There are a variety of places online to find out what’s going on in Toronto, however, using a visitor lens, the DMO website is the place visitors are most likely go to for festival and event information
- While the festivals and events calendar is a valuable tool for some, industry partners view it as an out-of-date platform that is a challenge to navigate
- Housing the calendar as part of the broader city events calendar in the future may take away from its usefulness for the visitor market
- Tourism and Visitor Economy should consider whether to continue this service, and if it does, improvements to the platform and marketing would be necessary

6. Workforce Development – Findings

The program’s purpose is to help fill a growing gap between jobs available in the hospitality sector and people capable of filling those jobs.

Tourism HR Canada reported that:

- The tourism sector had labour challenges before the pandemic; this has only worsened since the pandemic
- There is an ongoing need to help the sector find capable and qualified staff, and there will also be a need to help those looking for work to understand the employment opportunities in the tourism sector

In 2017, consultation with industry organizations such as the Hospitality Workers Training Centre (HWTC), Ontario Tourism Education Centre (OTEC), Destination Toronto and the Tourism Industry Association of Ontario (TIAO) confirmed that the local situation mirrored the national situation. As a result, the Tourism Services Unit began working with Toronto Employment and Social Services (TESS) to develop a Tourism and Hospitality Workforce Development program.

Tourism Services connected industry employers seeking talent and clients who were looking for work. TESS supported this endeavour. The program continued to evolve to include job seekers outside of TESS’s programs, such as post-secondary students in hospitality and tourism programs and the wider public interested in gaining employment in Toronto’s tourism sector.

Industry Interviews Discussions were held with individuals directly involved in tourism workforce development, including senior representatives from OTEC, HWTC, TIAO, Ontario Restaurant Hotel Motel Association (ORMHA), Greater Toronto Hotel Association (GTHA), Humber College, Destination Ontario, and Destination Toronto. These individuals were well versed in the challenges faced by the sector. They provided valuable insight related to the workforce development needs of the industry and the role the Tourism Services Unit could or should play.

Interviewees acknowledged and were appreciative of the Tourism Services Unit and TESS efforts to help address tourism workforce challenges in the city. There was consensus that several other organizations had more direct expertise to develop strategies to address workforce shortages in Toronto’s tourism sector.

Interviewees said there are several parallel organizations, but the nature of relationships among these organizations is complicated. It was also acknowledged that the task was challenging given the complexity of the tourism sector in the city. There is a shared perspective that employers are confused about seeking help to find qualified staff. While job fairs represent an opportunity for employers to meet job seekers, it is but one tactic among many.

For example, the Tourism Services Unit facilitated a Hospitality and Tourism Fall Job Fair in 2022 at Metro Hall; 300 job seekers met directly with 20 industry employers hiring for the upcoming season. In 2019 in addition to a spring job fair, a fall recruitment event was held at Golden Mile Employment & Social Services, and 60 job seekers attended and met directly with ten industry employers looking to hire in the near future. These sessions were deemed to be successful. However, several interviewees suggested while the numbers were good, the resources allocated to these events didn’t warrant the return.

The Tourism Services Unit is facilitating the work of the Toronto Regional Working Group. With assistance from OTEC and the province-wide Tourism Skillsnet Ontario program, this activity aims to create a healthy tourism workforce within destinations across Ontario, and specifically Toronto. However, those directly involved in the program suggested that because of the complexity of Toronto's hospitality sector, the group has been challenged to generate tangible tactics to address the urgent workforce development needs.



“ We need to make sense of what we have and identify the best way to all work together to meet the needs.”

“ Employers are confused about where to go to and who to see when it comes to finding good help, they have checked out, not engaged.”

“ Job Fairs are not filling the gap; the City might consider facilitating direct recruitment strategies by specific sectors.”

Interviewee Comments

Workforce Development in Other Destinations Toronto is in a unique position for workforce development. Both the city and DT have taken on active roles to help address labour shortages in the sector, unlike other jurisdictions reviewed. The DMOs in Montreal, Berlin, and London did indicate that others like provincial/state governments, sector associations (UK Hospitality), and Chambers of Commerce work with the businesses community to help ensure a healthy workforce. Visit Berlin and Tourism Montreal did say they perform a supportive role if called upon.

Workforce Development – Observations

The following observations can be made after a thorough review of the Workforce Development program:

- The efforts of the Tourism Services Unit to spearhead initiatives to address labour challenges in the hospitality sector starting in 2017 was appreciated by all industry partners
- More recently, however, given the challenges brought on by the pandemic and the complexity of Toronto's tourism sector, many industry partners believe there is a lack of clarity around who is doing what when it comes to addressing workforce gaps and challenges
- When it comes to developing solutions for Toronto's hospitality labour challenges, it was suggested there is a gap in valid employer data; therefore, there is a lack of clarity when it comes to defining where and what is needed from an employer perspective – it was suggested this could be a future role of the Tourism Services Unit
- While most did not express it this way, several suggested the city could be a catalyst to facilitate action to address the significant labour gaps and challenges identified by the tourism sector

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