



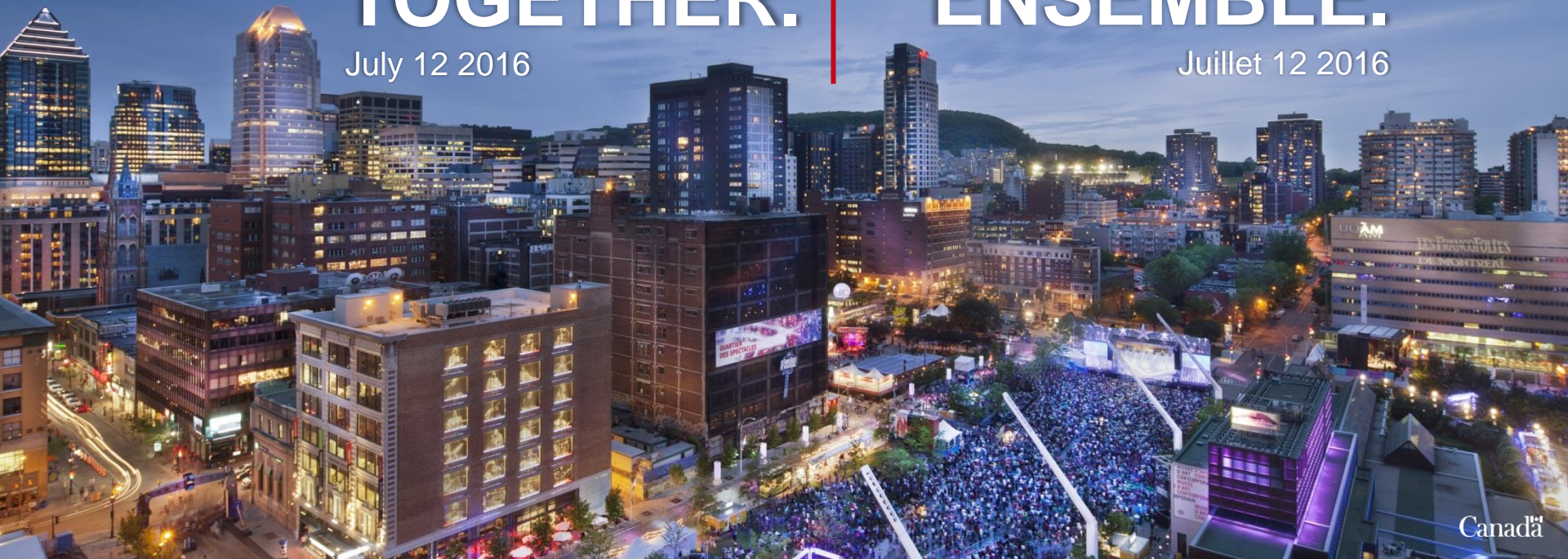
DESTINATION
CANADA

AMBITIOUS.
TOGETHER.

July 12 2016

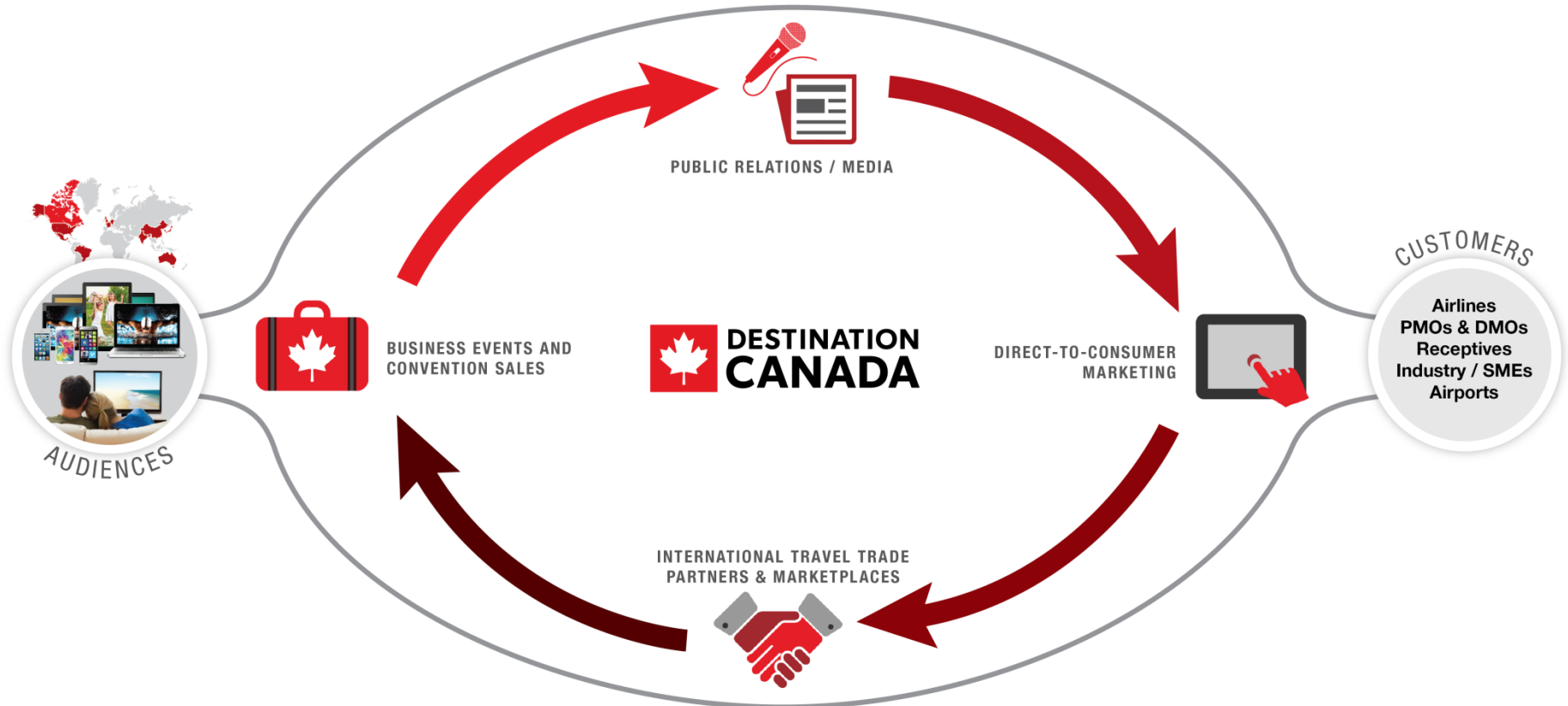
VOIR GRAND.
ENSEMBLE.

Juillet 12 2016





OUR BUSINESS



OUR CORE OBJECTIVE

GENERATE DEMAND FOR CANADA

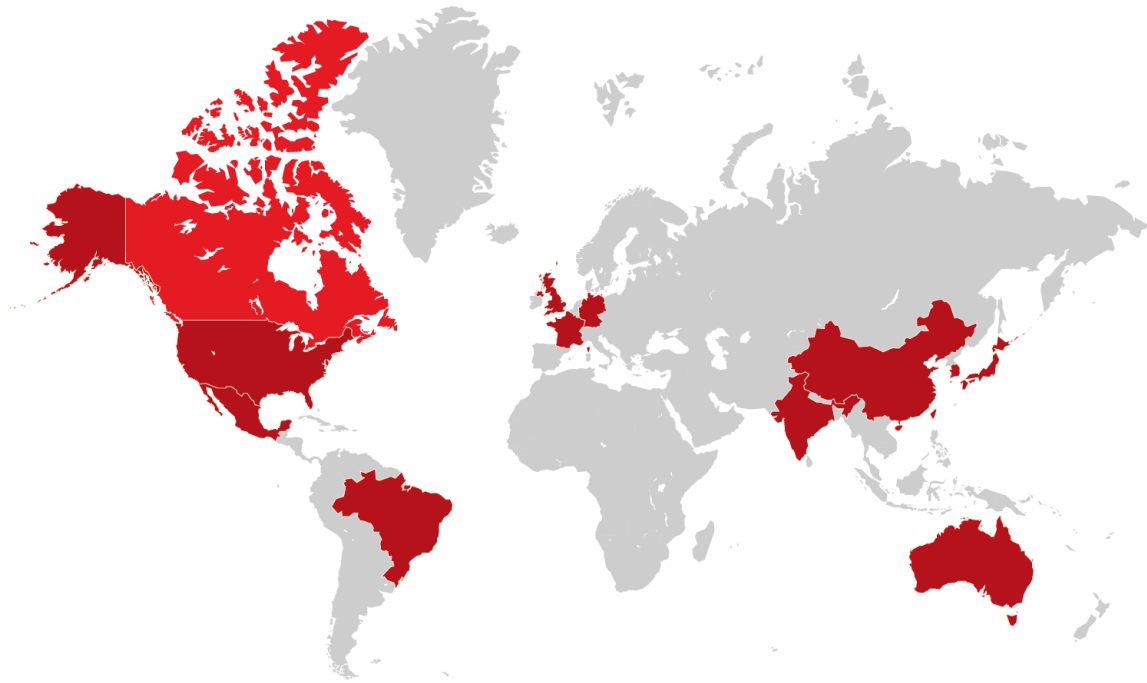
Leisure Travel



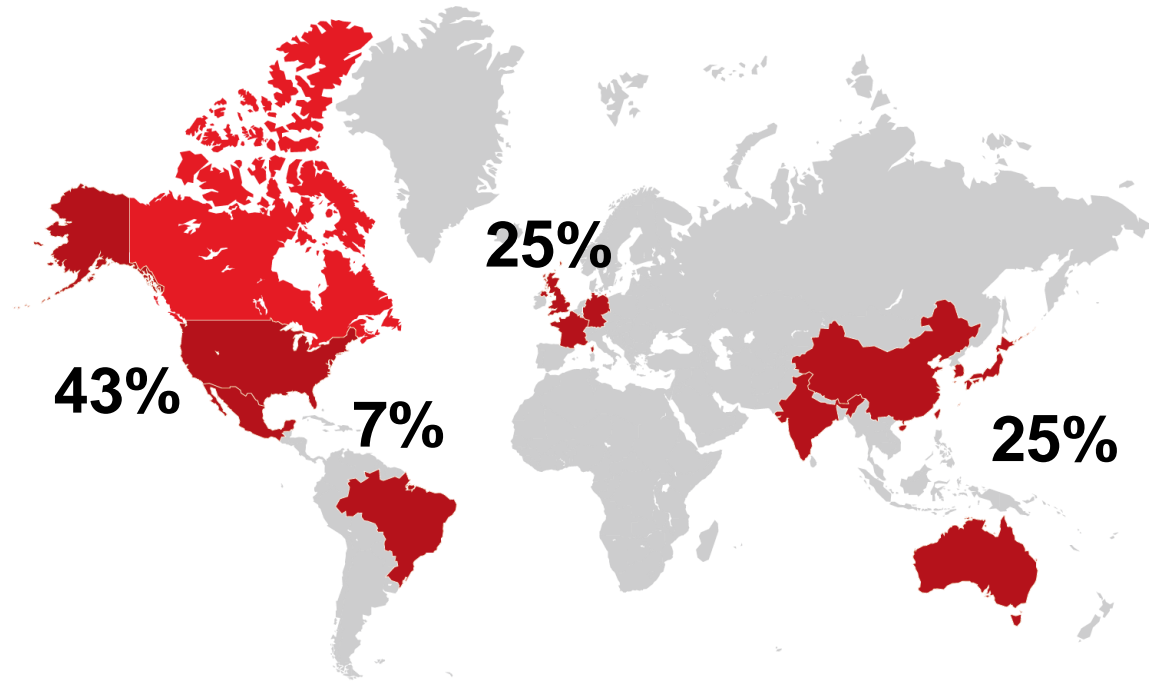
Business Events



OUR MARKETS



OUR INVESTMENT MIX



**By 2030, our industry will
DOUBLE in size.**

SOURCE: UNWTO Global Arrivals

1.8 BILLION travelers
taking a vacation outside of
their country per year.

SOURCE: UNWTO Global Arrivals

An aerial, high-angle photograph of a city at night, showing a dense grid of skyscrapers and streets illuminated by city lights. The perspective is from a high vantage point, looking down on the city. The text '20-20-2020' is overlaid in the center of the image.

20-20-2020



**DESTINATION
CANADA**

So...Why?

Why does Destination Canada exist?

Why?

Create **ABOVE AVERAGE** value

Why?

Enable our partners to **EFFICIENTLY**
enter International Markets

The **Two-speed** Challenge

PRECONCEIVED NOTIONS ABOUT CANADA



**We're Too Cold
All Year Round**



**We Lack Urban
Sophistication**



**We're Far Away
In Their Minds**



We're Costly

What is our **PATH**
to success?

STRATEGIC BUSINESS NEEDS

- **Facilitate** (Becoming a Media Company)
- **Accelerate** (Drive International Demand)
- **Incubate** (Innovate & Re-Engineer Market Readiness)
- **Relate** (Increasing Commercial Relevance)

FACILITATE

Who are our

Customers?

BECOMING A MEDIA ORGANIZATION



ACCELERATE

MULTI-BRAND SHARE STRATEGY

Recognized by 94%
of the world's
population

Worth \$74B

500+ brands
& 3,500+ beverages

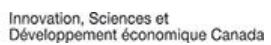




TEAM CANADA



ÉQUIPE CANADA



CHARTING THE COURSE WITH CO-INVESTORS

PMOs



DMOs



Convention Centres



Canada's Industry



INCUBATE

Over the next 15 years, even in
the next 5 years, we'll be
competing in a **VERY**
DIFFERENT world.

In a complex customer journey,
our job is to **BUILD**
PREFERENCE for Canada and
make the travellers' choice to visit
Canada **SIMPLE.**



BUILDING CRITICAL MARKETING CAPABILITIES



Content Led

Data Driven

**ALWAYS
ON**

**CREATIVE
CANVAS**



BUZZFEED USERS VIEW **159,380** PIECES OF CONTENT

SNAPCHAT USERS WATCH **6,944,444** VIDEOS

Netflix SUBSCRIBERS STREAM **86,805** HOURS OF VIDEO

GOOGLE TRANSLATES **69,500,000** WORDS

Americans USE **18,264,840** MEGABYTES OF WIRELESS DATA

YOUTUBE USERS SHARE **100** HOURS OF NEW VIDEO

FACEBOOK MESSENGER USERS SHARE **216,302** PHOTOS

Amazon MAKES **\$222,283** IN SALES

Giphy SERVES **569,217** GIFS

Dropbox USERS UPLOAD **833,333** NEW FILES

Dropbox USERS UPLOAD **13,888,889** FORECAST REQUESTS

Dropbox USERS UPLOAD **833,333** NEW FILES

2016
every
MINUTE
of
the
DAY

PRESENTED BY DOMO

Instagram USERS LIKE **2,430,555** POSTS

SIRI ANSWERS **99,206** REQUESTS

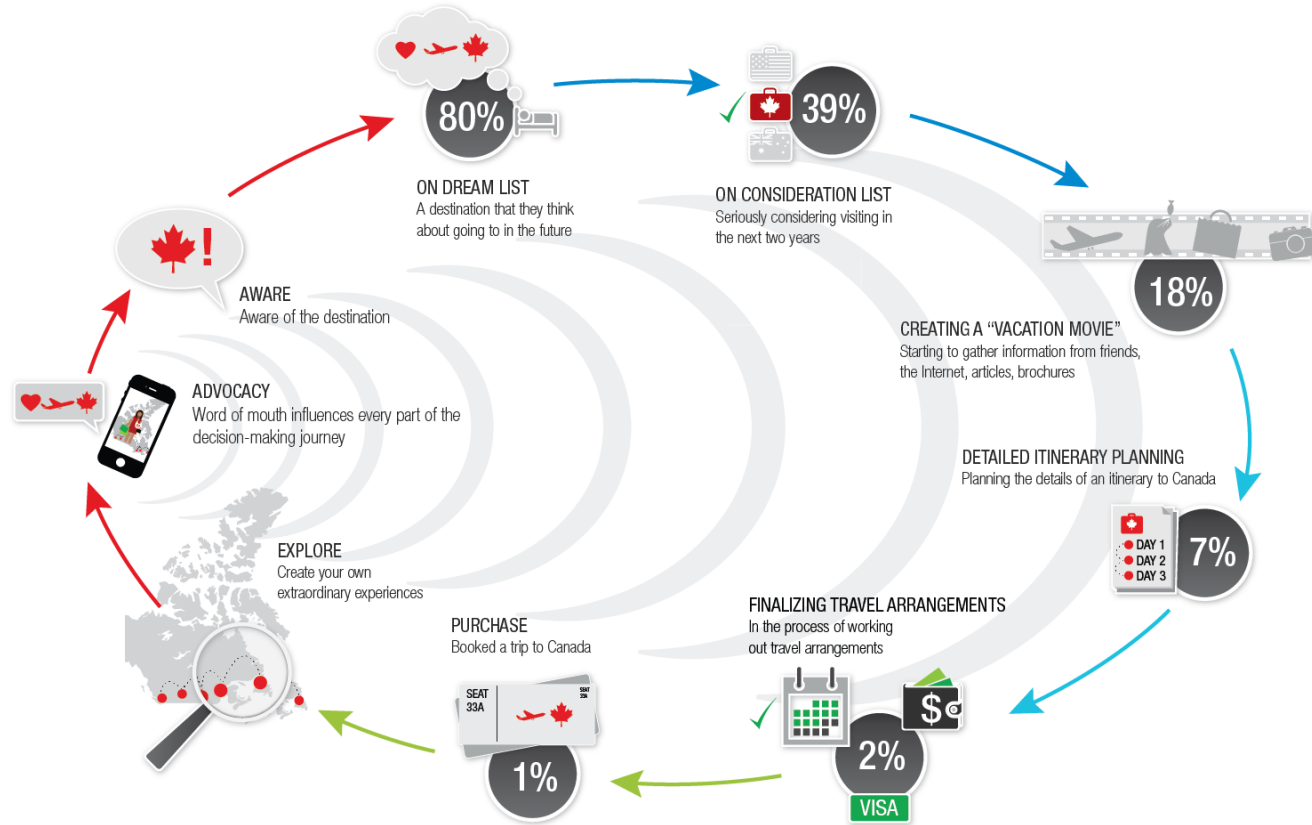
Tinder USERS SWIPE **972,222** TIMES

THE WEATHER CHANNEL RECEIVES

TWITTER USERS SEND **9,678** EMOJI-FILLED TWEETS



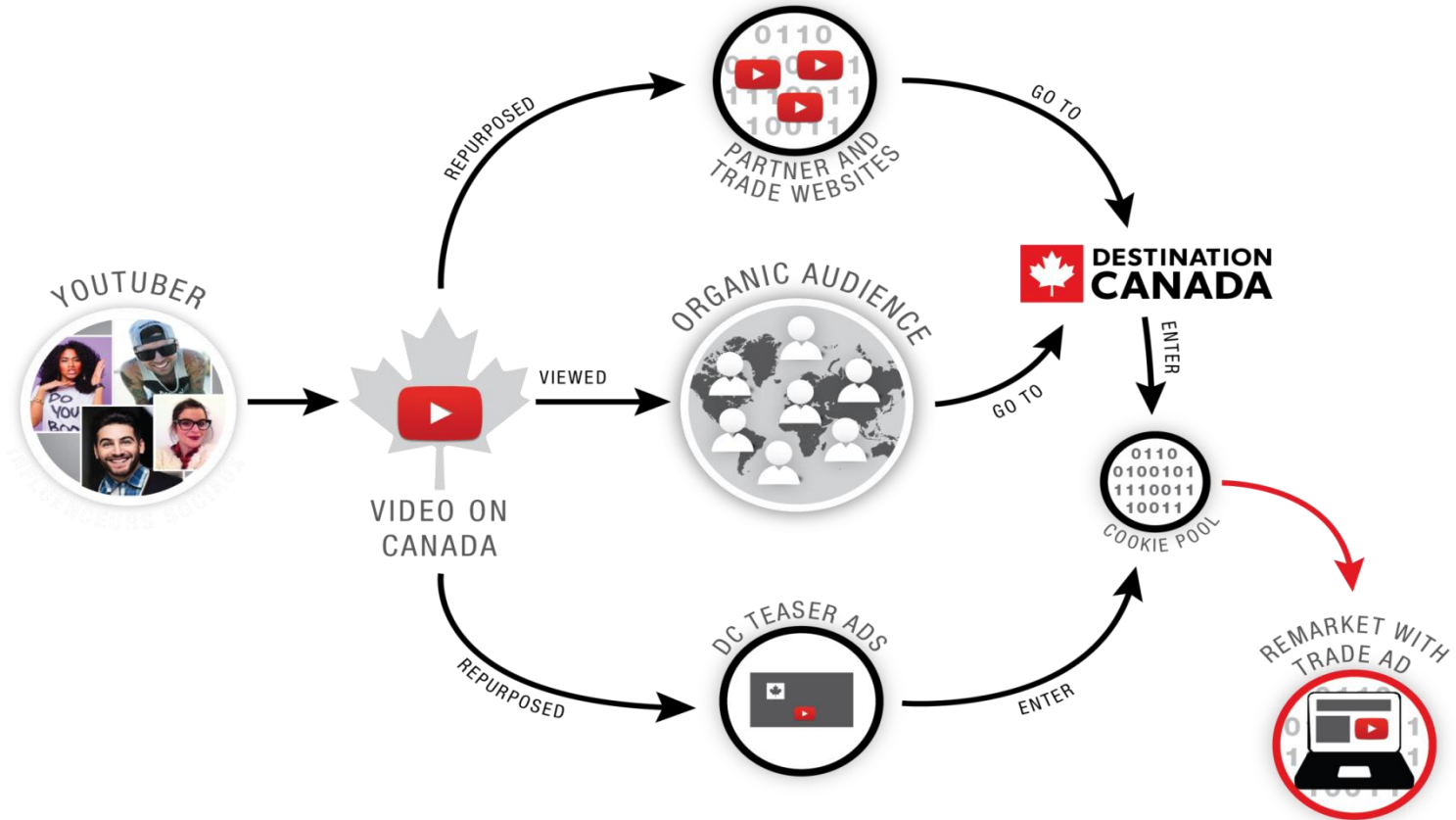
THE PATH TO PURCHASE



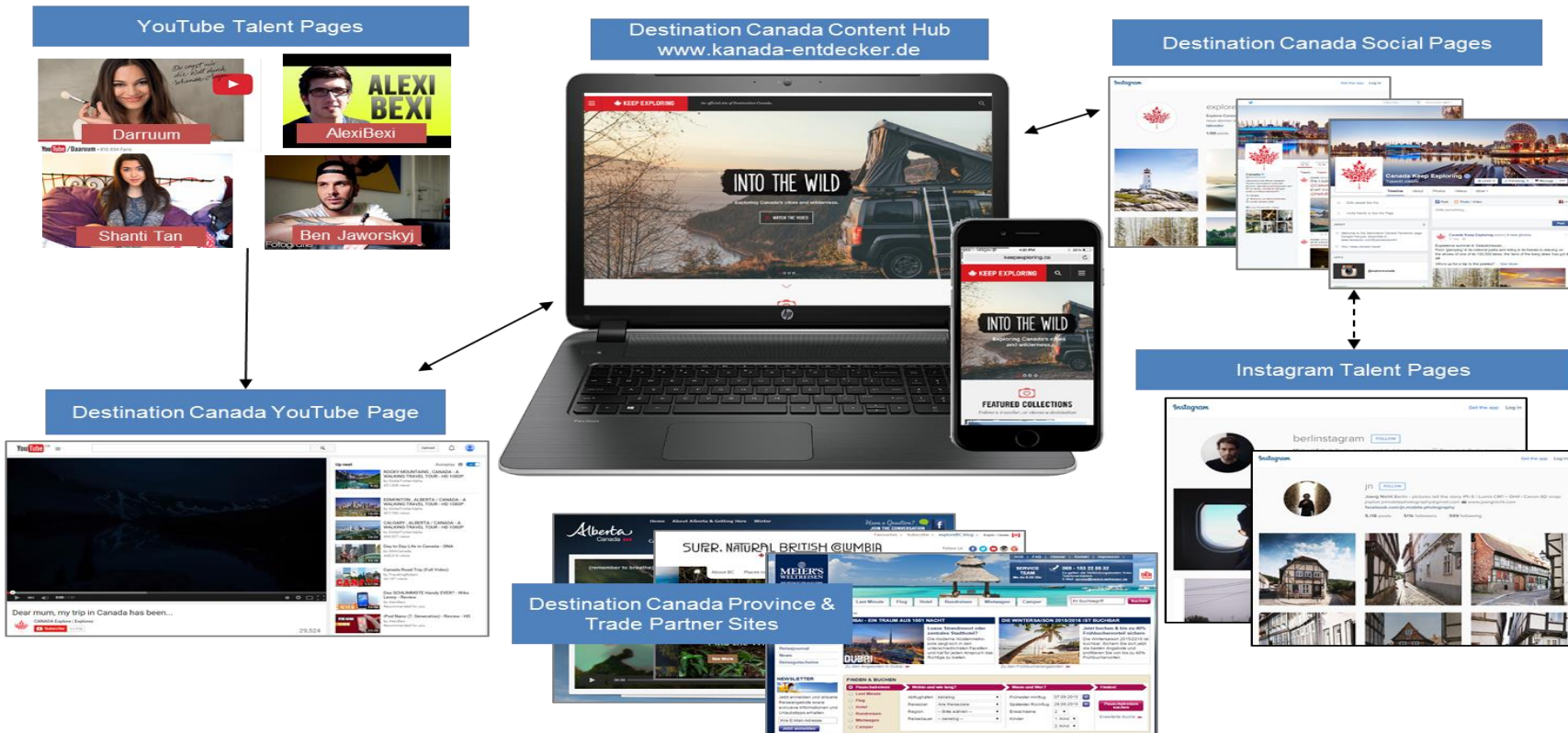
RE-ENGINEERING OUR WAY FORWARD



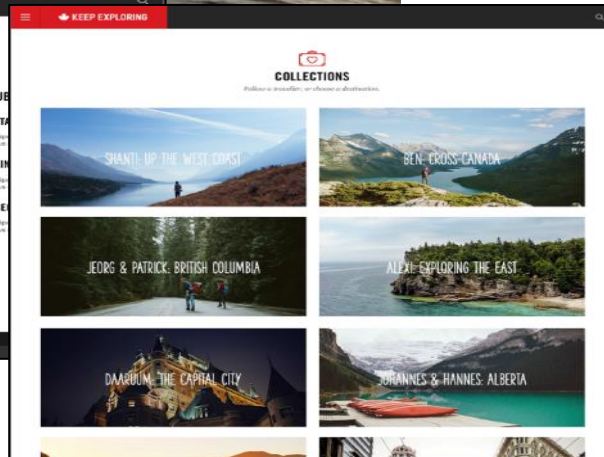
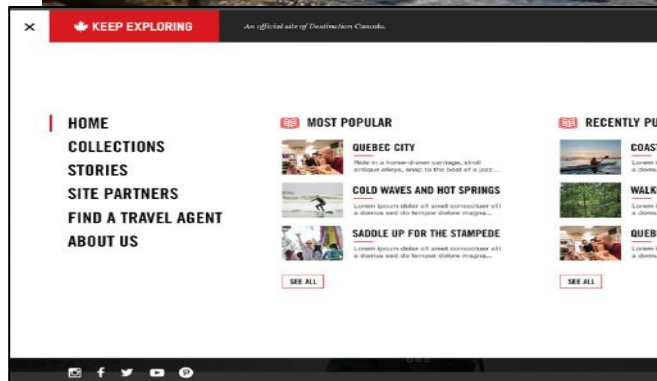
CONTENT LIFECYCLE



CONTENT ECOSYSTEM



CONTENT HUB



LEADS TO TRADE



Destination
Facebook Post



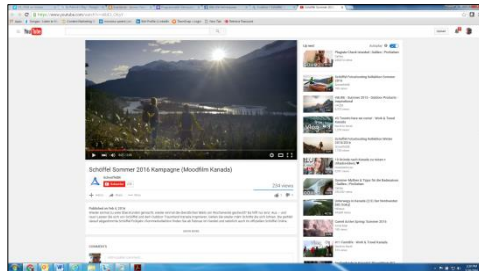
Tour Operator
Catalogue



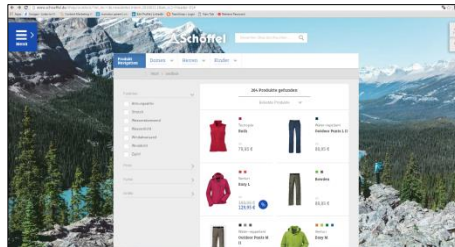
Schoffel
Newsletter



Schoffel Catalogue

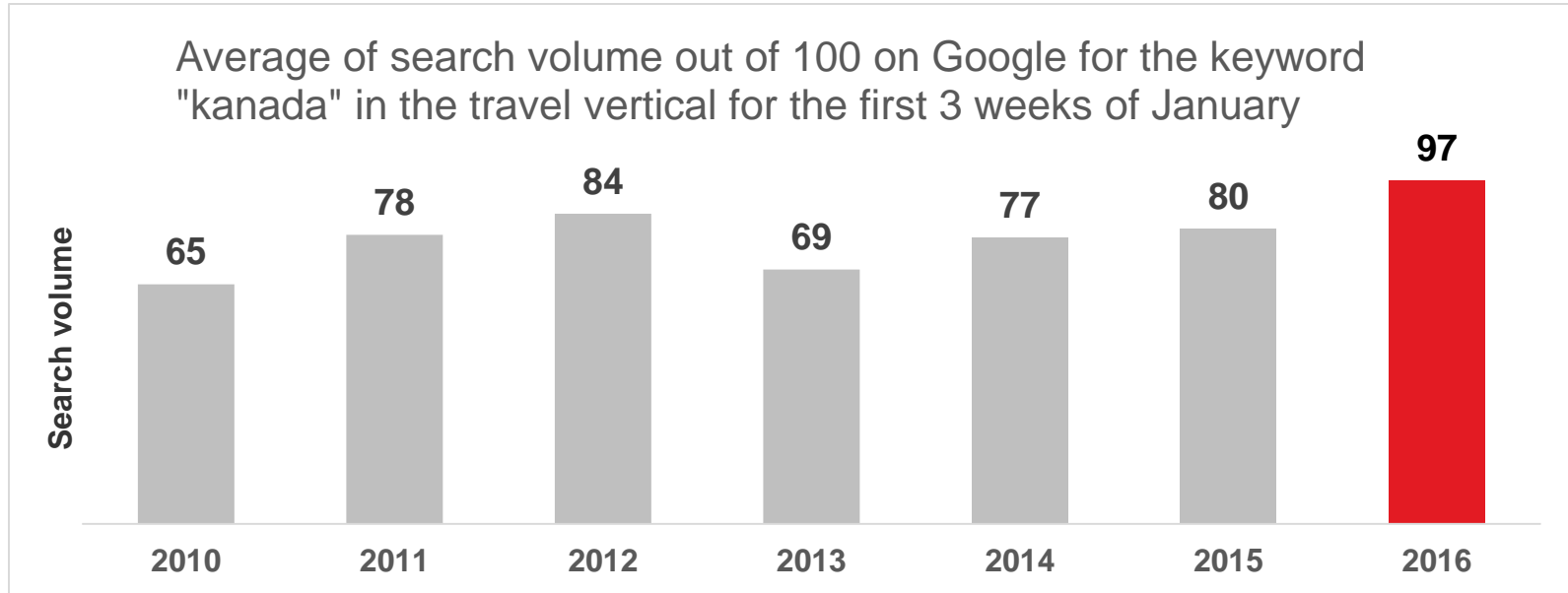


YouTube



Schoffel e-commerce
site

TRAVEL INTEREST HIGHEST IN 6 YEARS



Source: Google Insights for Search, publicly available interface, "kanada" keyword, Travel category, from January 2010 to 2016

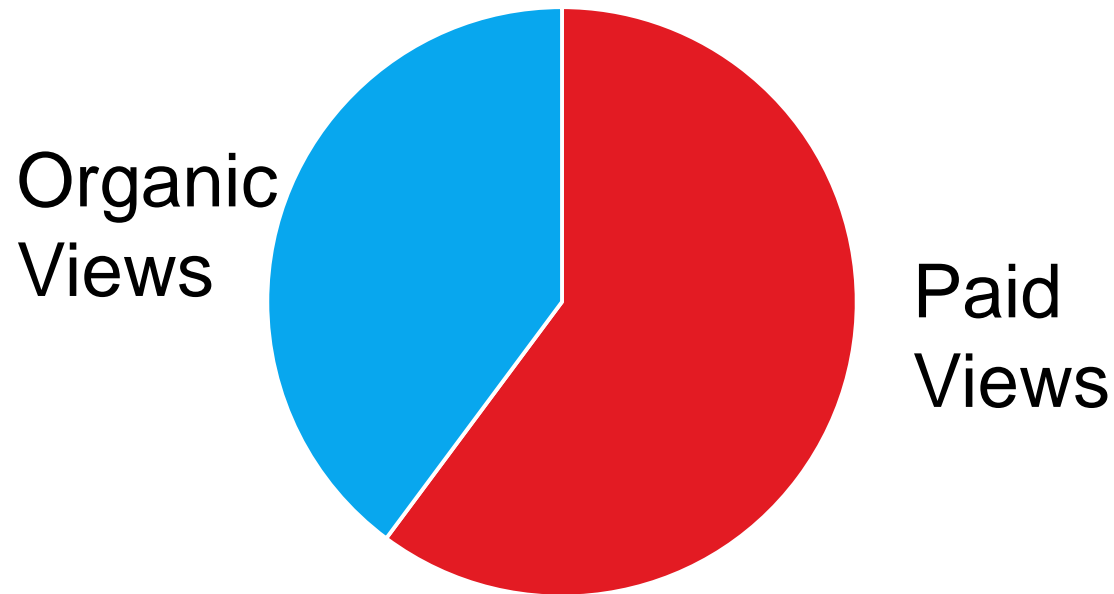
*“We would expect that a media spend of at **least 5 million euros** would be needed to show positive movement interest in Canada.*

*Destination Canada and partners smartly achieved this with **1/5** of the investment”*

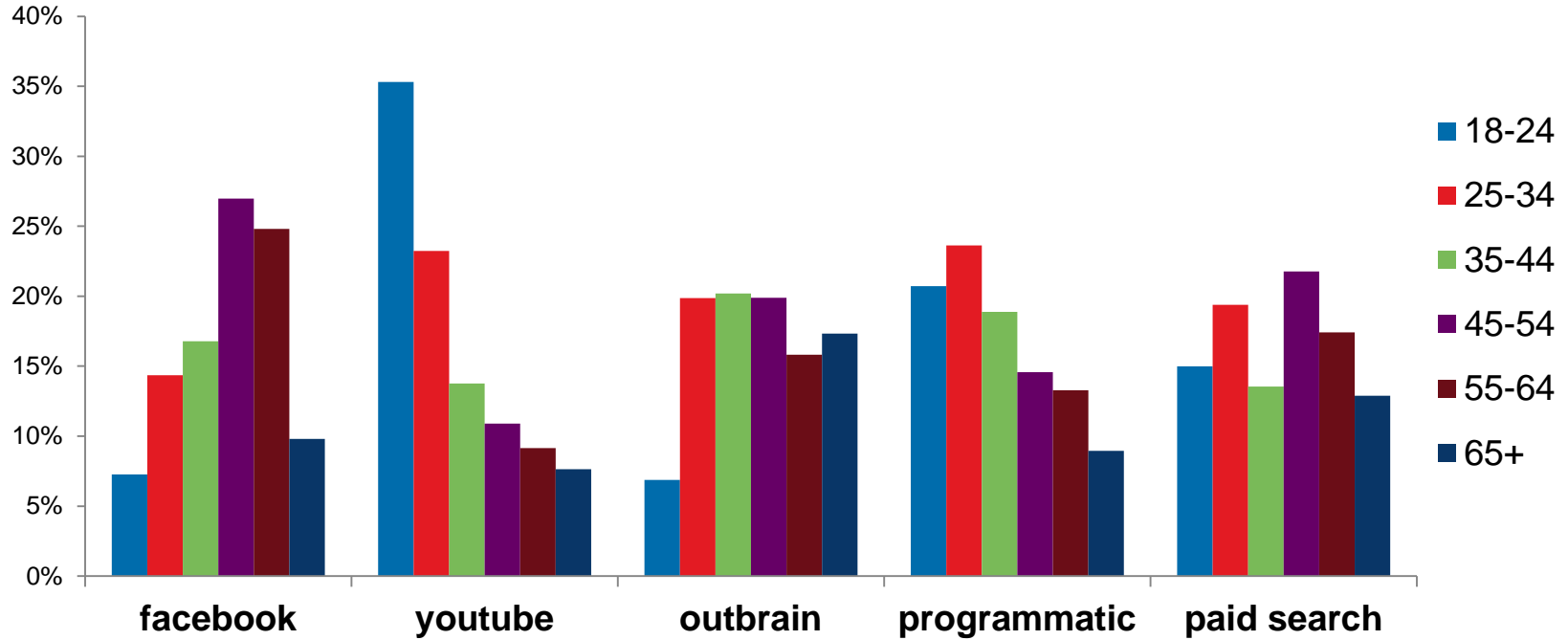


Jon Bromstein
Analytical Lead
Google Canada

CONTINUED ENGAGEMENT WITH CONTENT



REACHED A WIDE DEMOGRAPHIC

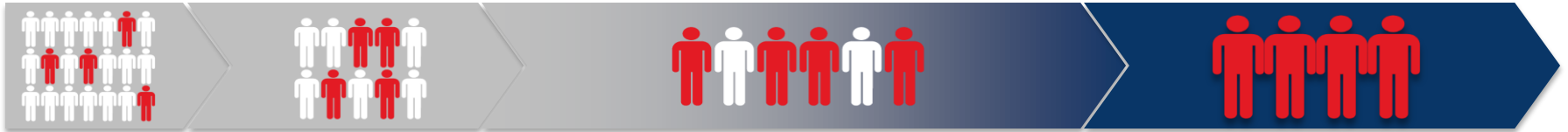


A hand holding a smartphone is the central focus, set against a vibrant blue background filled with binary code (0s and 1s) and digital data patterns. The text 'MASTER THE MEDIA MACHINE' is overlaid in the bottom left corner in a bold, white, sans-serif font.

MASTER THE MEDIA MACHINE

WORKING SMARTER

- Industry using one common technology platform – a **“world first”** for tourism
- Leveraging the **power of the Canada brand**
- **Scale this capability** to our US launch and in other markets



RELATE

Creating commercial

relevance... **THINK** like

the animal you **HUNT**

KEY INDUSTRY SECTORS



HOTELS



**AIRLINES &
AIRPORTS**



**FOOD AND
BEVERAGE**



**ATTRACTIONS
& EVENTS**

**What are we
looking for?**

WHAT WE VALUE IN OUR AGENCY

1. Technical and Analytics Expertise
2. Understands Content Marketing and Tourism
3. Draws from a global talent pool
4. Partners with us in rethinking the traditional model
5. Can work with us to leverage our trade and media partnerships
6. Knows how to leverage influencer networks
7. Know the human side of numbers

ESTIMATED SCOPE

Destination Canada carries out its activities in a variety of countries. Overall budgets in these countries are (2015 annual report)

	2015
UK, France, Germany, Australia	\$17,096,000
India, Brazil, Mexico, Japan, South Korea, China	\$17,515,000

- In 2016, DC injected >\$14M into a US program
- DC also received an incremental \$50M to be invested in 2016/2017/2018

MILESTONES

Milestone

Dates

Intent to Submit (*)

July 27, 2016, 14:00 hours PT

Deadline for Questions

July 28, 2016, 14:00 hours PT

Closing Date and Time

August 11, 2016, 14:00 hours PT

Presentations of Shortlisted
proponents

October 5 – 7, 2016

QUESTIONS?



**DESTINATION
CANADA**