

INTERNATIONAL MARKET FOCUS

UNITED KINGDOM

Travellers from the U.K. stay approximately 11 nights in Ontario and spend an estimated \$1,600 per trip.¹



MARKET POTENTIAL FOR ONTARIO

384K¹	\$614.1M¹	39%¹	16%¹	2.9M²	DIRECT FLIGHTS
Visitors from the U.K.	Visitor Expenditures	3-year Visitor Growth	YoY Visitor Growth	Expressed an interest to visit Canada in the next 2 years	To Ontario from London, Manchester, Birmingham, Glasgow and Edinburgh

IMPACT OF DESTINATION ONTARIO'S WORK IN 2017/18³



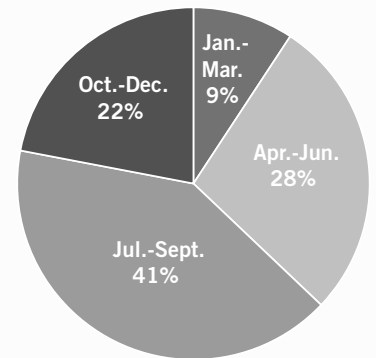
2.4K Incremental Trips to Ontario Generated	146.7K Web Visits	\$3.2M In Earned Media
\$4.4M In Direct Incremental Visitor Expenditures	68K Campaign Leads	
973 Travel Company Representatives Trained on Ontario Products	3M Video Views	
19 New Ontario Trip Itineraries Developed		



TRAVELLER INSIGHTS

41%² of travellers to Canada also visited the US as part of the same trip	47%² of travellers used a travel company during their most recent long-haul trip
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TRAVEL TO ONTARIO BY SEASON¹



PRE-TRAVEL

TV programs, travel guidebooks and films featuring the destinations are among the top 5 information and inspiration sources for people planning to travel	Due to challenging economic conditions, political uncertainty, and currency fluctuations, the U.K. market is becoming more cost conscious
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DURING TRAVEL TOP INTERESTS TO THE TRAVELLER

Urban Experiences, Sports Events and Nightlife British tourists take shorter "city break" tours. Toronto and Ottawa are preferred destinations	Natural Attractions Niagara Falls and Fall colours	Trying local food and drink
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WHAT WE KNOW

- Strong historical ties between Ontario and the U.K.
- Direct flights between Ontario & U.K. is the strongest / most frequent out of all international markets
- Travellers from the U.K. appreciate kettles and free Wi-Fi at hotels
- Toronto and Niagara Falls are still the most popular destinations for travellers from the U.K., although there is growing interest in itineraries across Ontario including Ottawa, Blue Mountain and Georgian Bay
- There is a segment that prefers to take public transportation over a rental car

Sources: 1. International Travel Survey 2016 | 2. Global Tourism Watch 2017 | 3. Destination Ontario 2017-18 Annual Report

PLANNED ACTIVITIES FOR 2018/19



DESTINATION ONTARIO'S MARKET STRATEGY

- Promotion of off-peak season travel to Ontario
- Promote new areas such as Blue Mountain, Muskoka, Northern Ontario, Ottawa, 1000 Islands Region and Prince Edward County
- Differentiate Ontario as a destination through travel trade and media relations
- Utilize Destination Ontario's in-market representatives in all aspects of strategy

AREAS OF EMPHASIS

Uncovering hidden gems

Discovering epic Canada

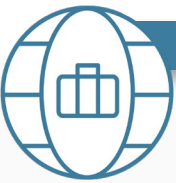
Experiencing vibrant cities

CONSUMER MARKETING



Leverage Destination Canada's efforts and build awareness and consideration for Ontario as a vacation destination through:

- Consumer digital and social marketing
- Content partnerships with key publishers and influencers



TRAVEL TRADE

Actively promote market-ready Ontario products and experiences to travel companies (tour operators and travel agents), and convert awareness to sales through:

- In-Market Business-to-Business Sales Programs
- Travel agent training with partners
- Partnered Ontario Product Tours with representatives of travel companies
- Joint Marketing Agreements
- Pitching Ontario products at key trade shows and one-on-one meetings
- Leverage Destination Canada's investment and activities

MEDIA RELATIONS



Enable positive editorial coverage to stimulate travel interest through earned media by:

- Developing and maintaining close working relationships with key journalists, influencers, and targeted media outlets
- Pitching stories at key events and one-on-one meetings
- Providing visual assets and content
- Partnered Ontario Product Tours
- Leverage Destination Canada's investment and activities