

INTERNATIONAL MARKET FOCUS

UNITED STATES

Travellers from the U.S. stay approximately 4 overnights in Ontario and spend an estimated \$600 per trip.

MARKET POTENTIAL FOR ONTARIO

12.4M¹ Visitors from the U.S.	\$4.4B¹ Visitor Expenditures	17%¹ 3-year Visitor Growth	9%¹ YoY Visitor Growth	33M² Expressed an interest to visit Ontario in the next 2 years
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IMPACT OF DESTINATION ONTARIO'S WORK IN 2017/18

NEAR MARKET CONSUMER CAMPAIGN RESULTS^{3a}

111K Incremental Trips
\$26M Incremental Expenditures as a Result of Advertising

CONNECTING AMERICA RESULTS³

95K Incremental Trips to Ontario Generated
\$51M In Tourism Expenditures Resulting from the Combined Ontario Partner Investment in Destination Canada's partnered USA marketing program

TRAVEL TRADE RESULTS³

5.1K Incremental Trips to Ontario Generated
\$3.2M In Direct Incremental Visitor Expenditures
281 Travel Company Representatives Trained on Ontario Products
8 New Ontario Trip Itineraries Developed

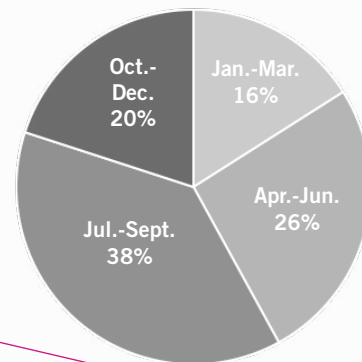
MEDIA RELATIONS RESULTS³

\$15.9M Earned Media

TRAVELLER INSIGHTS

Nearly **50%²** of U.S. leisure visits to Canada involved a trip to Ontario
64%² of leisure travellers to Canada from the U.S. arrive via drive traffic

TRAVEL TO ONTARIO BY SEASON¹



PRE-TRAVEL

General search engines, social media and travel guidebooks are among the top 5 information and inspiration sources
Travellers seek experiences that appeal to their sense of adventure and personal growth

DURING TRAVEL

TOP INTERESTS TO THE TRAVELLER

FROM U.S. TO CANADA

→ Local food and drink → Nature
→ Natural Attractions

FROM U.S. NEAR MARKETS TO ONTARIO

→ Outdoors → Concerts and Festivals
→ Urban Experiences → Local food and drink

WHAT WE KNOW

- Travellers from the U.S. look for destinations that are perceived to have
 - Unique cultures
 - Great shopping
- Travellers look for an opportunity to de-stress and spend quality time with friends and family
- Canada has positive perceptions and the travellers consider Canada as
 - A place that has beautiful outdoor scenery and landscapes
 - A safe place to visit
 - Having people who are friendly and welcoming

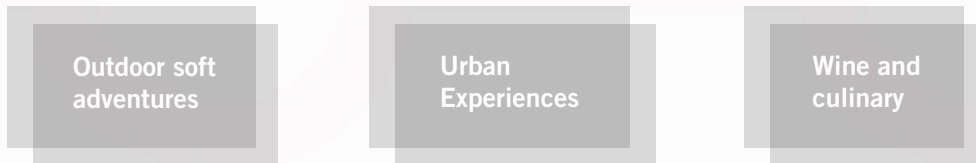
PLANNED ACTIVITIES FOR 2018/19



DESTINATION ONTARIO'S MARKET STRATEGY

- Consumer marketing campaigns through Co-investments in Destination Canada's Connecting America program and Co-marketing partnerships with industry
- Lead partnerships with Ontario partners who are active in the market (provide education on market readiness where applicable)
- Provide in-market trade opportunities to partners
- Support brand initiatives through media relations

AREAS OF EMPHASIS



CONSUMER MARKETING



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

- 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