

# INTERNATIONAL MARKET FOCUS

## JAPAN

Travellers from Japan stay approximately 8 nights in Ontario and spend an estimated \$2,400 per trip.<sup>1</sup>

### MARKET POTENTIAL FOR ONTARIO

<b>106K<sup>1</sup></b>	<b>\$252.9M<sup>1</sup></b>	<b>25%<sup>1</sup></b>	<b>-14%<sup>1</sup></b>	<b>1.5M<sup>2</sup></b>	<b>DIRECT FLIGHTS</b>
Visitors from Japan	Visitor Expenditures	3-year Visitor Growth	YoY Visitor Growth	Expressed an interest to visit Ontario in the next 2 years	To Ontario from Tokyo and Sapporo

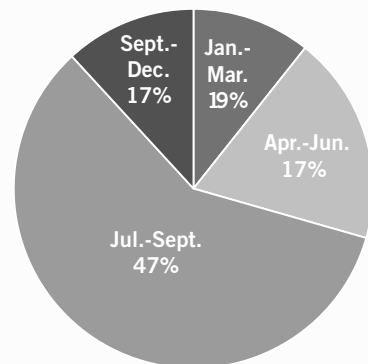
### IMPACT OF DESTINATION ONTARIO'S WORK IN 2017/18<sup>3</sup>

<b>6.2K</b> Incremental Trips to Ontario Generated	<b>170.7K</b> Web Visits	<b>\$15.9M</b> In Earned Media
<b>\$4.3M</b> In Direct Incremental Visitor Expenditures	<b>55.4K</b> Page Views	
<b>588</b> Travel Company Representatives Trained on Ontario Products		
<b>7</b> New Ontario Trip Itineraries Developed		

### TRAVELLER INSIGHTS

<b>62%<sup>2</sup></b> of travellers visited Canada as part of an organized group tour	<b>75%<sup>2</sup></b> of travellers used a travel company during their most recent long-haul trip
--	--

### TRAVEL TO ONTARIO BY SEASON<sup>1</sup>



#### PRE-TRAVEL

<b>TV programs, travel guidebooks and magazine/newspaper articles featuring the destination</b> are among the top 5 information and inspiration sources for people planning to travel	Seeing a great trip itinerary continues to be an important factor influencing selection of travel destinations
---	--

#### DURING TRAVEL

#### TOP INTERESTS TO THE TRAVELLER

<b>Beautiful Outdoor Scenery</b> Niagara Falls, Algonquin Provincial Park, Fall colours	<b>Trying Local Food and Drink</b> Great food and dining experiences are liked and they prefer local restaurants, and wineries	<b>Historical and World Heritage Sites</b> Small towns, farmers markets and Byward and Kensington markets are popular
--	---	--

#### WHAT WE KNOW

- Being late is frowned upon
- Couples prefer rooms with 2 beds
- Rooms with bathtubs are preferred over rooms with only showers
- Japanese language services delight the traveller
- They prefer hot meals for breakfast and lunch
- Younger travellers are foodies
- At restaurants
  - Fresh fruit is preferred over a baked dessert
  - Smaller portion meals are desired over larger portions
  - Tipping is not customary in Japan
- Speaking slowly when communicating is appreciated

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

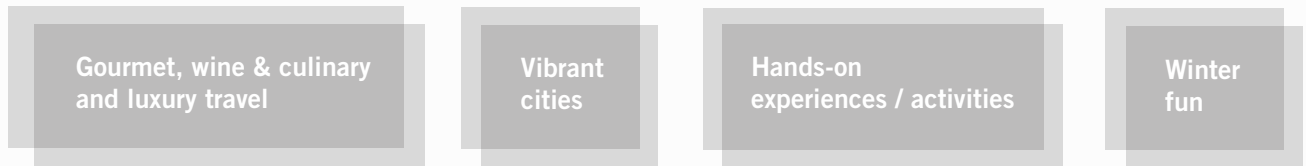
# PLANNED ACTIVITIES FOR 2018/19



## DESTINATION ONTARIO'S MARKET STRATEGY

- Leverage the new Japan-Montreal direct flight by promoting combined products with Quebec
- Reach out to Online Travel Agencies, target the younger Free Independent Traveller segment and promote new area hotels to expand the areas of the province where Japanese travellers stop overnight
- Joint Marketing Agreements with key tour operators, seek and integrate non-traditional partners to reach new customers
- Continue promotion of winter products to increase off-peak season demand
- Utilize Destination Ontario's in-market representatives in all aspects of strategy

### AREAS OF EMPHASIS



## 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