

INTERNATIONAL MARKET FOCUS

GERMANY

Travellers from Germany stay approximately 13 nights in Ontario and spend an estimated \$2,150 per trip.¹

MARKET POTENTIAL FOR ONTARIO

130K¹ Visitors from Germany	\$281.1M¹ Visitor Expenditures	26%¹ 3-year Visitor Growth	13%¹ YoY Visitor Growth	2.75M² Expressed an interest to visit Ontario in the next 2 years	DIRECT FLIGHTS To Ontario from Frankfurt, Munich, and seasonal flights from Berlin
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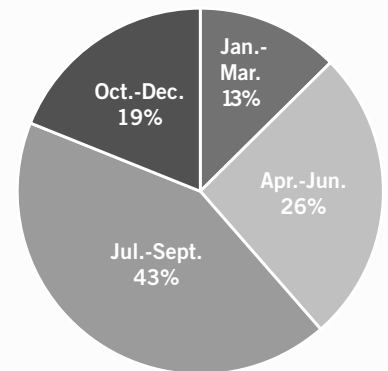
IMPACT OF DESTINATION ONTARIO'S WORK IN 2017/18³

2.7K Incremental Trips to Ontario Generated	61.9K Web Visits	\$8.4M In Earned Media
\$3.2M In Direct Incremental Visitor Expenditures	64.2K Campaign Leads	
394 Travel Company Representatives Trained on Ontario Products	4.9M Social Media Reach	
10 New Ontario Trip Itineraries Developed		

TRAVELLER INSIGHTS

50%² of travellers to Canada also visited the US as part of the same trip	55%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 destination are among the top 5 information and inspiration sources for people planning to travel	Personal recommendations from friends and family is cited as a top information source throughout most of the purchasing cycle. Encouraging advocacy from past visitors is key
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DURING TRAVEL TOP INTERESTS TO THE TRAVELLER

Iconic Attractions Niagara Falls, Fall colours etc.	Exploring Culture, Traditions and History Indigenous experiences in Ottawa and Manitoulin Island	Outdoor Activities Ontario Parks (e.g. Algonquin Park & Killarney) and canoeing
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WHAT WE KNOW

- Nature, wildlife and outdoor experiences are key motivations to travel to Ontario
- Travellers from Germany enjoy independent travel, touring the entire province, by car or motorhome
- Trips include visits to cities and Niagara Falls
- Indigenous travel experiences rank high on their wish list
- German employees receive an average of 6 weeks vacation per year
- Many travellers from Germany are repeat visitors to Ontario

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

- Promote off-peak season travel to Ontario
- Promote new destinations and experiences such as Blue Mountain, Muskoka, Northern Ontario, Ottawa, 1000 Islands Region and Prince Edward County
- Promote Toronto stop over packages in winter
- Promote smaller Ontario Provincial Parks for Fall colours
- Utilize Destination Ontario's in-market representatives in all aspects of strategy

AREAS OF EMPHASIS

Experiencing authentic Canadiana

Exploring regions, not singular destinations

Nature connected to 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