

Ontario Tourism Marketing Partnership MARKETING UPDATE

News ♦ Events ♦ Business Opportunities

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OFFICE OF THE PRESIDENT & CEO

The OTMPC's spring marketing campaign is underway and we've received 3,992 consumer registrations in response to the spring contest on the MicroSite. The direct-mail spring postcard has been generating most of the registrations. Staff are implementing the summer campaign which begins on May 5 with Domination Union Station, a consumer promotion targeting Toronto area commuters. More than 30 partners including DMOs and operators will offer consumers a taste of summer travel experiences across Ontario over a nine-day period. The promotion ends May 31st.

OTMPC has joined with the Toronto Tourism Coalition to plan a coordinated recovery program for the city and the province. This situation became even more critical when the World Health Organization (WHO) issued a travel alert. Unlike 9/11 which came at the end of the busy summer season, the current situation negatively impacts tourism at the beginning of the busy spring/summer season.

We are confident that by working with our partners we will be able to put in place an aggressive marketing campaign that will respond to the challenges that our industry is facing.

On April 24, 2003 the provincial government announced an additional \$10 million to assist marketing efforts that will be matched by the federal government. An additional \$5 million is also being allocated from the City of Toronto for a total of \$25 million.

We are working closely with the tourism industry, to rapidly and effectively respond. Updates will be posted on our partner web site: www.tourismpartners.com

ONTARIO CANADA Tourism Partners

The Ontario Tourism Marketing Partnership Corporation
is an agency of the Government of Ontario.

CONTACT

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President and CEO (A)
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NORTHERN TOURISM MARKETING UPDATE

Ted Day has been appointed Acting Director of Northern Marketing for the OTMPC. Ted served as the General Manager of the Interim Northern Marketing Office in 2002. Previous to this he was the General Manager of the Almaguin-Nipissing Travel Association in North Bay. The new OTMPC office will be located in Sault Ste. Marie and is expected to open in May. Ted can be reached at 705-474-6634 until the new office opens.

CONTACT

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Northern Marketing
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PARTNER SALES OPPORTUNITIES FOR FALL 2003

Deadlines are approaching for Fall advertising opportunities. The *Fall Experience Guide* is full-colour and will focus on fall sightseeing, resort getaways and other fall touring experiences. Approximately 100,000 copies will be distributed. The Fall Newspaper Insert will be 28 pages in length and will highlight autumn activities and experiences. Approximately 1.4 million copies of the insert will be distributed in 14 key Ontario markets, Montreal and four U.S. border states. Both the Fall Insert and the *Fall Experience Guide* will be distributed through 1-800-Ontario and at the Ontario Travel Information Centres. Advertising opportunities also available in the *Venez Chez Nous* and the *Fall Events Guide*.

Booking deadlines: May 9, *Fall Experience Guide* and May 16, Fall Newspaper Insert. For more information, please visit www.tourismpartners.com or call Brynda Browning.

CONTACT

Sales opportunities contact:
Brynda Browning
Direct Sales
Tel: 1-888-365-4422
416-314-6314
Email:
otmp.sales@mczcr.gov.on.ca

EVENT MARKETING - FREE EVENT LISTINGS WITH OTMPC

Time to start thinking fall. Please make sure that your **fall events** and those in your community are registered with www.tourismpartners.com. Seasonal event listings are completely **FREE**, and appear on both our consumer web site and in our quarterly event guides. Just a reminder that to access the web listing and event guides, you must register your organization with our industry web site at www.tourismpartners.com. Once you have registered and received confirmation, you will be able to submit your event listing. This information will then appear on our consumer site at www.ontariotravel.net.

If you want to have your fall events published in the OTMPC *Fall Events Guide*, you must submit your information by June 1, 2003. The guide will include events between the dates of September 1 and November 30. In summary:

<u>Deadline for Submission</u>	<u>Includes Events During</u>	<u>Event Season</u>
June 01, 2003	September - November	FALL
September 01, 2003	December - February	WINTER

A reminder to DMOs and VCBs that event listings will increase your region's presence on the web site and in publications.

CONTACT

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CTC ROAD SHOW

The Canadian Tourism Commission's (CTC) Road Show will be in the following locations, May 14 to 16, 2003:

- * **May 14th: Ottawa, ON**
Holiday Inn, Plaza de la Chaudière - Hull, QC @ 8:30am to 12:30pm
- * **May 15th: Toronto, ON**
Delta Chelsea Hotel - Toronto, ON @ 8:30am to 12:30pm
- * **May 16th: Niagara Falls, ON**
The Renaissance Fallsview Hotel - Niagara Falls, ON @ 8:30am to 12:30pm

For more information on CTC marketing activities, please visit the CTC web at www.canadatourism.com and www.travelcanada.ca

CONTACT

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Program
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Samuels.Judith@ctc-cct.ca

PARTNER NEWS

Sault Ste. Marie has been chosen as the site for the 2003 Eco-Challenge-North American Championships from July 18 to 27, 2003. This event will be televised on several major U.S. cable stations. For more information visit www.ecochallengeNAC.com

On April 16, 2003, Premier Ernie Eves, joined by Niagara MPPs Bart Maves and Tim Hudak, and Tourism and Recreation Minister Brian Coburn, announced that the interim Casino Niagara will stay open after the new Casino Niagara is built.

CONTACT

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FEEDBACK

Please direct feedback about *Marketing Update* to Tom Boyd, Corporate Communications. Tel: 416-212-0757, email: tom.boyd@mczcr.gov.on.ca. To update your company email or fax information contact Brynda Browning, Direct Sales at 416-314-6314 fax: 416-314-6976 or email: brynda.browning@mczcr.gov.on.ca. If you are requesting changes to our distribution list, please provide both the old and new information.

CONSUMER RESPONSE UPDATE

February 2003: Issue N°12

HIGHLIGHTS

- User sessions at OTMPC's web sites continue to grow! In February, user sessions at the B2C and B2B sites increased 47% and 21%, respectively, over February 2002.
- As usage of the web sites has increased, volume at the Call Centre has decreased. Call volume in February dropped to a level 21% lower than in February 2002.
- Consumer response to OTMPC's 2003 Winter Campaign has been positive! Over twice as many calls as last year were generated in response to Winter TV and over 1,200 Winter Getaway Guides – and 1,200 more in Kits - were ordered by consumers in January and February 2003.

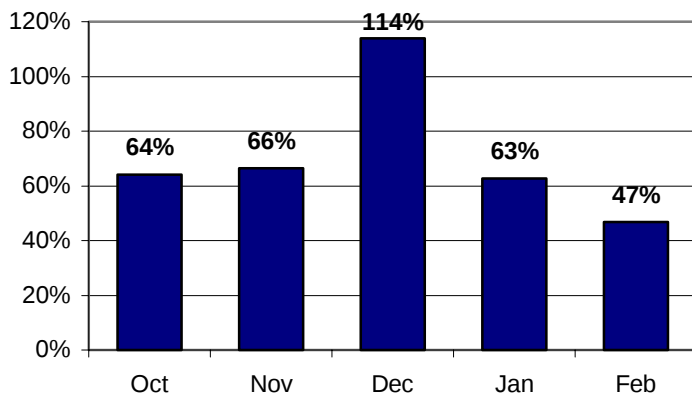
WEB SITES

OTMPC has four web sites – an information portal for consumers (B2C site) in English and in French and a portal to communicate with the tourism industry and partners (B2B site) in English and in French.

B2C Site – www.OntarioTravel.net

- In February, user sessions at OntarioTravel.net grew 47% over February 2002 to total nearly 114,000. User sessions averaged nearly 4,100 per day.
- Since the official launch of OntarioTravel.net in October 2002, user sessions have increased year-over-year as follows:

**User Sessions Grow at OntarioTravel.net:
Oct 2002 - Feb 2003 vs. Previous Year**



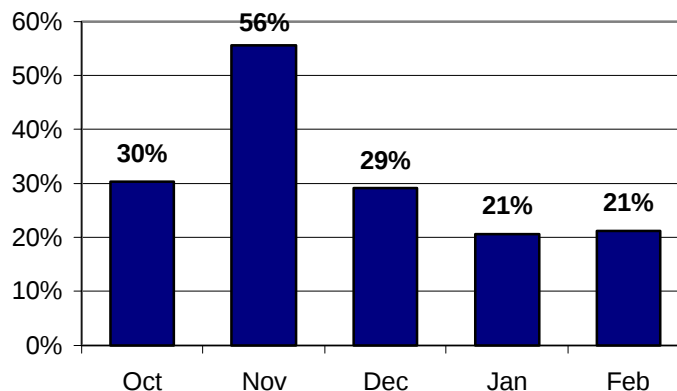
Registered Consumers

- From the TCIS launch in October 2002 to March 18, 2003, 21,820 consumers registered with OntarioTravel.net!
- Of consumers who registered, 97% were English and 3% French.
- Just over half (56%) of registrations were made by men.
- Most (60%) registrations were made by Canadians. Americans and overseas residents made 35% and 5% of registrations, respectively.

B2B Site – www.TourismPartners.com

- In February, user sessions at TourismPartners.com grew 21% over February 2002 to total almost 3,600. User sessions averaged nearly 130 per day.
- Since the official launch of TourismPartners.com in October 2002, user sessions have increased as follows:

**User Sessions Grow at TourismPartners.com:
Oct 2002 - Feb 2003 vs. Previous Year**



Registered Partners

- From the TCIS launch in October 2002 to March 17, 2003, approximately 2,500 partners registered with the B2B site.

FULFILLMENT CENTRE

The Call Centre and B2C site take requests for literature and fulfillment kits and report the distribution to OTMPC.

- In February, 18,500 fulfillment pieces were ordered by consumers – 64% by Canadians, 29% by Americans, and 7% by overseas residents. 28% of fulfillment pieces distributed were ordered online at OntarioTravel.net.
- With two less Kits available in January and February 2003 as in January and February 2002, Kit distribution to date dropped 21% over the same period in 2002.
- The drop in Kit distribution over last year is a likely result of the current online availability of publications at OntarioTravel.net. Publications weren't available online in January and February 2002.
- In February 2003, with 20 available for download, publications were viewed online over 8,600 times by consumers at OntarioTravel.net. Publications downloaded via OntarioTravel.net are extra to those ordered through the Fulfillment Centre.
- As indicated in the table below, it appears that consumers are already planning for Spring and Summer travel in Ontario. Spring and Summer fulfillment represented 19% of requests in January and February 2003.

Fulfillment Centre Requests: Year-to-Date 2003

	Fulfillment Piece / Kit	Quantity Distributed
1	2002 Ontario Reference Guide	6,085
2	Ontario Road Map	5,851
3	2002 Summer Experience Guide	2,918
4	2003 Ontario Adventure Guide	2,644
5	2002 Ontario Parks Guide	2,314
6	Summer Getaway Kit	1,526
7	2002/03 Snow Country Guide	1,214
8	2003 Winter Getaway Guide	1,210
9	Winter Getaway Kit	1,197
10	2002 Spring Experience Guide	993

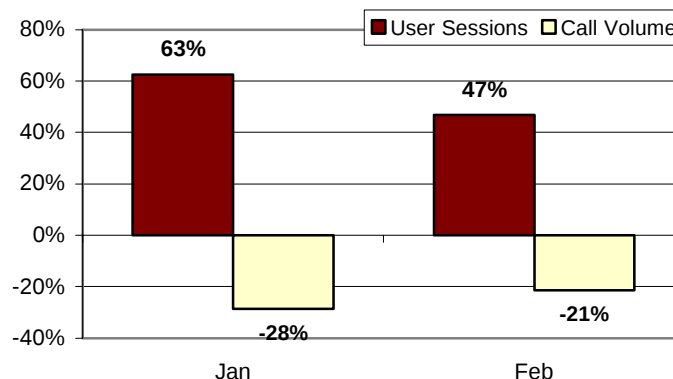
- As well, consumers appear to be planning online for Spring and Summer travel. OTMPC's 2002 Summer and Spring Experience Guides were downloaded 642 and 505 times, respectively, in February, placing them among the top five downloaded publications for the month.

CALL CENTRE

Call Centre data reports activity on the 1-800-ONTARIO and 1-888 lines. This activity covers all calls that enter the Interactive Voice Response (IVR) system, whether they are handled by an automated response or directed to an agent.

- Calls to the Call Centre in February totalled nearly 16,900 – a decrease of 21% over February 2002.
- While the drop is not unique to OTMPC (a similar trend is being observed across North America as consumers shift their usage of the phone to the web) it seems also to result from the presence of OTMPC's Spring Campaign in February 2002.
- The February 2002 Spring Postcard boosted calls for the month by nearly 3,000, and the lack of similar activity in the same markets in February 2003 left call volumes in those markets 75% lower, on average, than in February 2002.
- As shown in the following chart, call volume to date is 25% lower than in the same months in 2002, while user sessions at OntarioTravel.net are 55% higher than in 2002.

User Sessions Grow, Calls Decline **Year-to-Date: 2003 over 2002**



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- Of calls in February 2003, 80% originated in Canada, the majority (81%) of which came from Ontario. 20% of calls were from the US, most of which (60%) originated in Ontario's 7 US Border States.

2003 WINTER CAMPAIGN

- A 30-second Winter television ad promoting OTMPC's 2003 Winter Getaway Guide through OntarioTravel.net and 1-800-ONTARIO ran in Ontario throughout January 2003.
- The Winter Getaway Guide, available for download on OntarioTravel.net, individually, or as part of the Winter Getaway Kit, was also distributed as an insert in 21 different Ontario newspapers in early January 2003.
- In January and February 2003, the online Winter Getaway Guide was the most downloaded file from OntarioTravel.net. During the months, the Guide was downloaded over 8,500 times.
- At the Fulfillment Centre, nearly 1,200 Winter Getaway Kits were requested by Canadians (89%), Americans (10%), and overseas (1%) residents in January and February 2003. Winter Getaway Kits were available in January and February 2002 but not distributed - likely because last year's Winter Campaign promoted the Winter Events Kit instead.
- In addition to the Guides included in the Winter Getaway Kit, over 1,200 Winter Getaway Guides were ordered in January and February 2003.

TCIS SERVICE LEVELS

As per OTMPC's contract with EDS, OTMPC requires TCIS service levels to be at, or exceed, predetermined levels.

Call Abandonment

Service Level Criteria: Average monthly abandonment rate of less than 5%.

- In February, abandoned calls averaged 3%.

Average Speed to Answer

Service Level Criteria: Of the calls answered by EDS, at least 80% are to be answered within 30 seconds.

- On average in February, calls were answered in 11 seconds.

CONSUMER RESPONSE UPDATE

March 2003: Issue N°13

HIGHLIGHTS

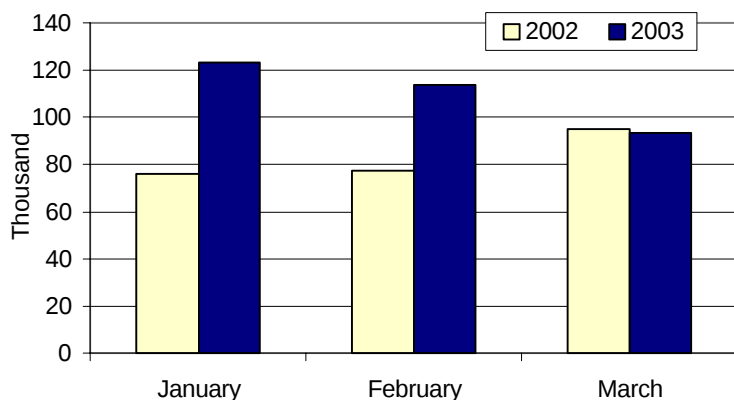
- **OTMPC's Spring Campaign is off to a great start! In just 2½ weeks of its launch, nearly 3,200 consumers registered with the Spring MicroSite!**
- **OTMPC's Consumer Launch Campaign, closed March 19, prompted 3,800 consumer registrations to OntarioTravel.net in just one month!**
- **User sessions at OntarioTravel.net grew 33% in the first quarter of 2003 over the first quarter of 2002!**
- **Call volume decreased proportionately (31%) in the first quarter of 2003 over the first quarter of 2002.**

WEB SITES

B2C SITE – www.OntarioTravel.net

- As shown in the chart below, user sessions in March declined slightly (-2%) over March 2002.
- Year-over-year growth in January and February, however, was substantial enough to boost user sessions in the first quarter of 2003 33% over the first quarter of 2002.

**User Sessions Grow at OntarioTravel.net:
Q1 2003 vs. Q1 2002**



- The decline in user sessions in March (the first since August 2002) seems, in part, attributable to the Iraq War and SARS.
- On March 20, user sessions dropped 44% over March 19, the evening of which saw the onset of the War in Iraq. User sessions in the midst of War and SARS (from March 20 to March 31) were 31% lower

than during the first half of the month, and 4% lower than during the same period last year.

- March's decline also seems, in part, due to the timing of the Spring Campaign relative to last year.
- Last year saw – with the Web among calls-to-action – Spring Postcards drop in late February (over a month sooner than this year) and TV ads in mid-March.
- March 10, 2003 saw the highest level of user sessions at OntarioTravel.net and the highest volume of calls offered to Call Centre agents for the month of March. The high volume (its origin not likely the result of advertising) was probably produced by March Break planners.

ONLINE PUBLICATIONS

- In March 2003, 24 online publications were downloaded 9,500 times.
- OTMPC's 2003 Adventure Guide was downloaded most often (1,750 times).

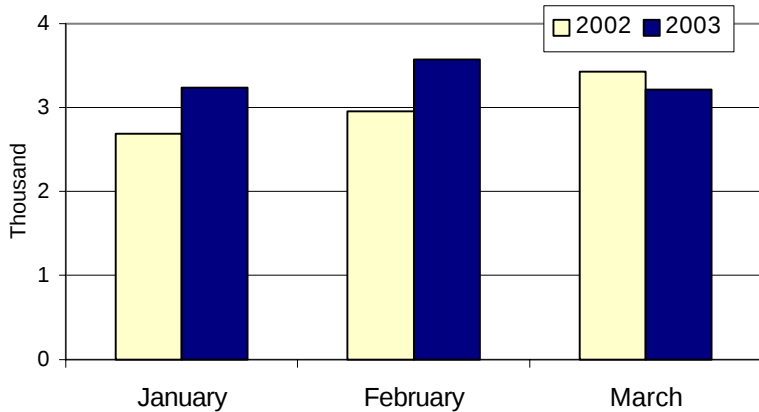
REGISTERED CONSUMERS

- Between the Web site's launch on October 18, 2002 and March 26, 2003, nearly 22,500 consumers registered with OntarioTravel.net!
- Of registered consumers, 13,950 (62%) opted to receive e-marketing material from OTMPC.
- The majority (97%) of registered consumers to date are English-speaking, Canadian (61%), and male (56%).

B2B SITE – www.TourismPartners.com

- In March, user sessions at TourismPartners.com dropped slightly (-6%) over March 2002. Site registration not being heavily marketed during the month may have sparked the drop by not pushing user sessions past the level achieved last March.
- Because of significant year-over-year growth in January and February, however, user sessions at the site grew 11% in the first quarter of 2003 over the first quarter of 2002. This is shown in the following chart.

User Sessions Grow at TourismPartners.com: Q1 2003 vs. Q1 2002



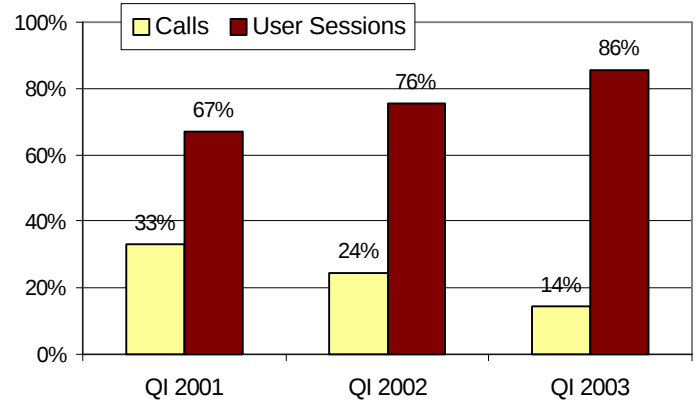
REGISTERED PARTNERS

- Between the Web site's launch on October 18, 2002 and March 31, 2003, almost 2,500 partners registered with TourismPartners.com.

CALL CENTRE

- Total calls offered to the Call Centre in March 2003 totalled just over 20,200; a drop of 39% over March 2002.
- Overall, call volume dropped 31% in the first quarter of 2003 over the first quarter of 2002.
- Over the past five years, calls to the Call Centre have changed in terms of volume, but not in the patterns they follow.
- In the first quarter of 2003, call volume decreased in February over January and increased in March over February, as in each year before it.
- It seems that travel planning behaviour and interest in travel, at least during the first quarter, have remained relatively constant over time, peaking and dipping in similar months, while the method of doing so has changed – from the phone to the Web.
- As a percentage of consumer response, phone calls have decreased steadily between the first quarter of 2001 and the first quarter of 2003. User sessions in the first quarter have increased steadily as a percentage of consumer response between 2001 and 2003.
- This trend - a change in consumer preference from the phone to the Web - is shown in the following chart.

Calls, User Sessions as a Proportion of Consumer Response: Q1 2003 vs. Q1 2001



- Of calls to the Call Centre in the first quarter of 2003, 81% originated in Canada and the remainder (19%) in the U.S.
- Of calls from Canada, the majority (83%) came from Ontario. In the U.S., the majority (59%) came from Ontario's 7 border states.

FULFILLMENT CENTRE

- Nearly 23,600 fulfillment pieces were requested by consumers in March, bringing fulfillment distribution for the first quarter of 2003 to 62,000.
- Fulfillment pieces in the first quarter of 2003 were distributed to consumers in Canada (67%), the U.S. (27%), and overseas (6%).
- Of fulfillment pieces distributed in the first quarter of 2003, 29% resulted from online orders.
- While it is unknown how the first quarter's total fulfillment distribution compares to that in the first quarter of 2002 (due to a change in tracking methods in May 2002), kit distribution in the first quarter of 2003 totalled 7,700 - down from 15,300 in the first quarter of 2002.
- It is likely that the availability of publications online in the first quarter of 2003 (combined with consumers' increasing Web use year-over-year) fuelled the drop in kit distribution. Publications were not online in the first quarter of 2002.
- At the Fulfillment Centre, as indicated in the following table, consumer requests for Spring and

Summer fulfillment pieces were prevalent among the top ten pieces ordered in the first quarter.

Top Ten Fulfillment Requests: Q1 2003

	Fulfillment Piece / Kit	Quantity Distributed
1	Ontario Road Map	9,627
2	2002 Ontario Reference Guide	7,984
3	2002 Summer Experience Guide	5,478
4	2003 Adventure Guide	4,567
5	2002 Ontario Parks Guide	4,283
6	Summer Getaway Kit	2,086
7	Spring Kit	1,761
8	2003 Winter Getaway Guide	1,476
9	2002 Summer Events Guide	1,470
10	2003 Fish Ontario Guide	1,440

2003 SPRING CAMPAIGN

- OTMPC's Spring Campaign launched in March with the objective of motivating - through a Spring MicroSite and contest, a themed event at Union Station, direct mail postcards, newspaper ads, and fulfillment pieces - 'getaway' trips by Ontario residents within the province.
- To drive traffic to and encourage registration with OTMPC's consumer Web site, the Spring MicroSite and contest launched March 25. A registration with the MicroSite entered consumers into a contest to win a weekend getaway for two (valued at over \$1,500) to the Canadian Tulip Festival in Ottawa.
- Half-page newspaper ads in the Toronto Sun throughout April and in the Toronto Star (April 3 and 5) promoted the contest, as did 500,000 postcards mailed unaddressed to homes in Burlington, London, Mississauga, Ottawa, and Toronto on March 31.
- OTMPC's themed event at Union Station on March 25 allowed the distribution each of 25,000 tulips, Spring Events and Spring Experience Guides to passers-by.
- Likely in relation to the event, March 25 saw Call Centre agents receive their highest volume of calls for a Tuesday in March.
- In response to the Spring contest, registrations on the Spring MicroSite to April 11 totalled nearly 3,200.

- April 2 and 3 were the busiest days to date on the MicroSite, generating 38% of all registrations between them. It is likely that consumers began receiving their Spring Postcards on these days, and the newspaper ads on April 3 were a boost to the already-high response.

- According to consumers, the majority (77%) of registrations were motivated by the Spring Postcard.

- Women entered the Spring contest most (65%), as did those aged 46 to 60 (30%).

- Virtually all registrations (99.7%) were made by Canadians. The remaining ten entries were made by Americans.

- The majority of Spring contest entries (89%) represented new registrations with OntarioTravel.net.

2003 CONSUMER LAUNCH CAMPAIGN

- Between February 19 and March 19, 2003, OTMPC invited consumers, via online ads and e-mails sent within Ontario, Michigan, New York, Ohio, and Pennsylvania, to "escape to Ontario".

- E-mail invitations and online ads detailed a contest, which if registered with, offered the chance to win one of three Ontario weekend getaways for two to Ottawa, London, or Lake Simcoe. The campaign's objective was to boost consumer registrations with OntarioTravel.net.

- Online ads (8.7 million page views) were present throughout the duration of the campaign. E-mail invitations (51,000) were issued during the second week of the campaign.

- By its close on March 19, just over 3,800 consumers registered with the contest.

- Online ads and e-mail invitations generated 56% and 24% of contest registrations, respectively.

- The majority of registrations (76%) were made by Canadians. More women (67%) than men (33%) registered, and registrations from those aged 25 to 35 (35%) were most prevalent.

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