

Ontario Tourism Marketing Partnership MARKETING UPDATE

News ♦ Events ♦ Business Opportunities

May 2003 Page 1/3

OFFICE OF THE PRESIDENT/CEO

SARS, the Iraq War, border crossing issues, West Nile Virus, a rising Canadian dollar and a slowing U.S. economy are creating new and unprecedented challenges for the tourism sector. The OTMPC has undertaken a number of immediate steps to combat these adverse conditions.

On the day that the WHO lifted its advisory, the OTMPC launched a \$1 million partnership campaign with Mirvish Productions, highlighting two packages that included hotels, restaurants, theatre and Blue Jays tickets in order to kick start travel in Toronto. The partnership resulted in selling more than 120,000 packages. OTMPC also launched an assurance commercial on May 9, to get the message out to Ontarians that it was safe to travel to Toronto. Both the Mirvish Program and the assurance commercials were launched under the theme "It's time for a little T.O.". This new slogan was developed by OTMPC in partnership with the Toronto Tourism Coalition. The U.S. campaign has been developed and will be in market shortly.

Ontario Tourism Minister Brian Coburn participated in a press conference in New York City on May 5 via video teleconference at Media Marketplace. Federal Minister of Industry Allan Rock, CTC Chair The Honourable Charles Lapointe and CTC Interim President & CEO Doug Fyfe also participated in the press conference. Ministers Coburn and Rock set the record straight about the SARS situation in Canada so that key U.S. travel media and industry would know that we are open for business. Approximately 215 media representatives attended the two-day event. Helen Lovekin represented the OTMPC at Media Marketplace.

On April 29, Premier Ernie Eves announced the next steps in the SARS Recovery Strategy, which included a \$128 million two-year recovery-plan, to rebuild global confidence in Toronto and Ontario as world-class travel destinations.

Beginning June 16 to July 3, 2003 we will be on the road hosting our annual Partnership Forums across Ontario where OTMPC staff will share details of the Recovery Program and how to participate. I encourage you to join us at the forums this year. More information on dates, times and locations is attached for your reference.

Tourism Recovery Office Established

OTMPC has been working with the Ministry of Tourism and Recreation on the blueprint for the Recovery Program. A new office has been established and is headed by Scott Weeres who has been appointed Director of Tourism Recovery Program. The program reflects the fact that all areas of Ontario have been hard hit by SARS and other issues. New partnership opportunities and recovery plan details will be posted on the partners' web site at www.tourismpartners.com

ONTARIO

More to discover

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

CONTACT

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CONTACT

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SUMMER CAMPAIGN

OTMPC's Summer Campaign is well underway. The new television ads began on May 22 and will run for eight weeks, targeting the rubber-tire market. Approximately, 250,000 copies of the new full-colour 180-page Summer Experience Guide are being distributed at the Travel Information Centres (TICs) and through 1-800-ONTARIO. The new Summer Newspaper Insert was distributed in 15 Ontario markets on May 15 and four U.S. border markets on May 18.

OTMPC has also partnered with Niagara Falls Tourism on new television commercials that began running on May 21. These new ads will be in-market for three weeks in Buffalo, Cleveland and Detroit. The call-to-action is 1-888-WIN-FALL.

The new Ontario Adventure Campaign began on May 15 in the U.S. market with a strong direct mail component. Approximately 100,000 copies of the new 51-page, full-colour Ontario Adventure Guide are being distributed at the TICs, through 1-800-ONTARIO and via the consumer web site: www.ontariotravel.net

CONTACT

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QUEBEC MARKETING OPPORTUNITY!

In June, the OTMPC will launch a Montreal version of Domination Union Station. Ontario tourism suppliers will be able to reach the Montreal market with vacation-planning information prior to the summer travel season. Up to 319,800 people pass through Berri-UQAM corridor daily. This is a similar location to Union Station in Toronto, serving as the main transfer station in the entire network, connecting all main lines. It is also the station that houses the University of Quebec at Montreal (UQAM). The station is located within the busy and trendy commercial / cultural district of Quartier Latin, and within the bustling Uqam Buildings, Cinémathèque Québécoise, Bibliothèque Nationale, Théâtre St-Dennis, etc. If you would like to participate please call and seize this great opportunity to reach the Montreal market.

CONTACT

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

SELLING ONTARIO TOURISM ABROAD!

Harvey Hamazaki has been working diligently with representatives from the Asian market to regain lost market share due to the slowing economy in Japan and SARS. As part of this initiative, Harvey led a Trade Mission with Ontario Tourism Deputy Minister Bill Allen to Japan on May 18. Ontario industry officials met with key tour operators such as JTB and Kintetsu in Tokyo and Osaka.

Diane Helinski is also working with OTMPC's representatives in the U.K. and Germany to aggressively market Ontario in these key markets. A mission to the U.K. will occur in early summer and additional sales calls are being planned for Germany.

CONTACT

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CONTACT

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SELLING ONTARIO TOURISM ABROAD!

OTMPC pumped-up its activity at Rendez-vous Canada from May 23 to 28 in Vancouver. Staff assisted with the coordination of a special Globe and Mail newspaper wrap highlighting travel to Ontario which was distributed to all international buyers, sellers, media and DMO participants. The OTMPC also co-sponsored a press conference with Tourism Toronto to encourage travel to Ontario.

OTMPC initiated 10 Joint Marketing Agreements with companies such as DER Travel and Meier Travel from Germany and Travel Pack, Canadian Affair, and Thomas Cooke from the U.K.

CONTACT

Carol Maxwell
Advertising Director
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COOPERATIVE SNOWMOBILE MARKETING PROGRAM

Did you know that Ontario has the largest recreational trail system in the world for snowmobiling? OTMPC and the Ontario Federation of Snowmobile Clubs (OFSC) have developed a joint marketing campaign for 2003/04. This program will consist of a direct mail campaign targeting consumers in Michigan, Minnesota, New York, Ohio, Pennsylvania, Wisconsin and Ontario. The program will also include the production of a new 100-page, full-colour brochure that will be distributed at snow shows throughout North America. Space is limited so please book early. Deadline is June 27, 2003.

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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 number contact Brynda Browning, Direct Sales Assistant (A) 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

April 2003: Issue N°14

HIGHLIGHTS

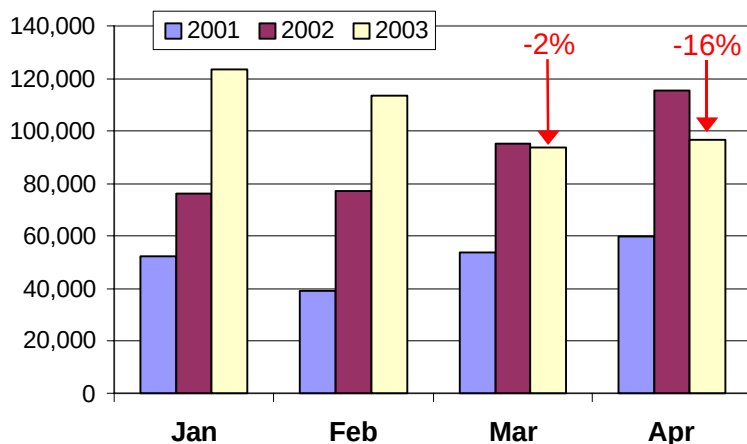
- *Consumer response in April seemed slowed by Toronto's highly publicized SARS outbreak.*
- *User sessions at OntarioTravel.net dropped 16% in April over April 2002.*
- *As in previous months, calls to the Call Centre were down. Call volume was 25% lower in April than in April 2002.*
- *Fulfillment kit distribution dropped 38% over April 2002.*

WEB SITES

CONSUMER SITE – www.OntarioTravel.net

- User sessions in April declined 16% over April 2002 at OntarioTravel.net.
- User sessions were also down slightly in March (-2%) over March 2002, the drop representing the first in seven months.
- The declines in user sessions in March and April seem a consequence of the Iraq War and SARS, as demonstrated by the following chart.

War, SARS Impede Growth in User Sessions at OntarioTravel.net in March, April 2003



- In April in years past, probably in relation to the rise in travel intentions as Summer approached, user sessions grew as the month progressed. User sessions did not grow, however, as April 2003 progressed.

- As April 2003 moved forward, SARS – and its outbreak in Toronto – became a focal point for the global media, especially between April 23 and 29 when the World Health Organization's (WHO) advisory against travel to Toronto was in effect.

- User sessions in the first half of April 2003 were down just 3% over the first half of April 2002. As the second half of April ended, user sessions were down 27% over the second half of April 2002. User sessions in the second half of April 2003 were unusually lower than in the first half.

ONLINE PUBLICATIONS

- 26 publications were downloaded 19,108 times from OntarioTravel.net in April.
- The three most popular downloads, accounting for 65% of downloaded publications in April, were the 2003 Spring Events Guide, the 2002 Reference Guide and the 2003 Spring Experience Guide.

REGISTERED CONSUMERS

- Despite user sessions decreasing year-over-year, 8,015 consumers registered with OntarioTravel.net in April. January to March 2003, registrations averaged just 4,300 a month.
- From the site launch in October 2002 to the end of April, registrations totalled approximately 31,000.
- To May 2, approximately half (51%) of registered consumers were male. Nearly all (97%) were English-speaking; 3% were French. The majority (69%) of registered consumers were Canadian; just over a quarter (27%) were American.
- To May 2, 19,538 registered consumers opted to receive e-marketing material from OTMPC.

PARTNERS SITE – www.TourismPartners.com

- User sessions at TourismPartners.com reached 3,234 in April; a 12% decrease over April 2002.
- User sessions, averaging 108 per day in April, were highest in volume, and above average, on April 28 (140), April 29 (171) and April 30 (258).

ONTARIO
More to discover

- Perhaps industry partners increased visitation to the site toward the end April in response to the April 29 announcement by Premier Eves of \$118 million toward the *Tourism and Investment Recovery Plan* designed to rejuvenate tourism in Ontario.

- The most downloaded publication (1,650 downloads) from TourismPartners.com in April was OTMPC's 2003/2004 Marketing Plan.

REGISTERED PARTNERS

- From the site launch in October 2002 to May 2, 2,600 partners registered with TourismPartners.com.

- Virtually all (99%) were English; 1% was French. Most registrations came from partners at 'accommodations' (38%) and 'attractions' (25%).

CALL CENTRE

- Calls to the Call Centre in April totalled 22,738; a 25% decrease over April 2002. Calls received in April were lower in volume than in any April in the past five years.

- Calls for the period January to April 2003 were 29% lower in volume than during the same months last year and 54% lower than during the same months in 1999.

- The drop in call volume over the past few years is not solely a trend at OTMPC, but across the industry and North America at large.

- Furthermore, OTMPC advertising typically uses its consumer Web site now as the call-to-action on marketing material versus its phone line – the primary call-to-action in years past.

- It is possible, too, that April's call volume was depressed as a result of lost interest in Toronto and / or Ontario as a travel destination during April's SARS scare and the resulting travel advisory imposed against it by the WHO.

- Approximately 2% of agent-answered calls between April 3 and May 3 were SARS-related. SARS enquiries seemed to come primarily from Americans. Aside from general questions about the syndrome, common enquiries included "Are there medical checks at the border?" and "Is Kingston (Barrie, Ottawa, Niagara Falls, etc.) safe?"

- As was the case with user sessions, the volume of calls offered to Call Centre agents in April 2003 was unusually lower in the second half of the month than in the first.

FULFILLMENT CENTRE

- Over 39,200 fulfillment pieces were ordered in April by consumers in Canada (84%), the U.S. (13%) and overseas (3%).

- 42% of fulfillment pieces distributed in April were ordered online at OntarioTravel.net.

- Likely because of online publications (not online last April) and decreases in calls to the Call Centre and user sessions at OntarioTravel.net in April, kit distribution dropped 38% over April 2002. The same amount of kits was available this April as last April.

- Distribution of the Canadian Spring Kit actually increased (15%) in April over April 2002, however, distribution of General Kits (-98%), Adventure Kits (-81%), French Kits (-69%) and U.S. Spring Kits (-58%) helped drag distribution down over April 2002.

- April's most requested fulfillment pieces are displayed in the table below.

Top Ten Fulfillment Requests: April 2003

	Fulfillment Piece / Kit	Quantity Distrib'd
1	Ontario Road Map	5,524
2	2003 Adventure Guide	3,141
3	2003 Ontario Parks Guide	2,804
4	2003 Spring Experience Guide	2,728
5	Spring Kit	2,703
6	2002 Ontario Reference Guide	2,701
7	2003 Spring Events Guide	2,672
8	2003 Ontario Reference Guide	1,984
9	Backroads and Getaways Guide	1,970
10	2002 Summer Experience Guide	1,508

PARTNERSHIP FORUMS

OTMPC invites you to attend our 2003 Partnership Forums

Get the latest on current market situation and Ontario's Recovery Plan.

The 2004 / 2005 Marketing Strategy will be developed with your input and finalized in September.
Join in discussions on Partner Engagement including opportunities, planning and communications.
Working together to strengthen Ontario's tourism industry.

Please indicate the
meeting you will
attend

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Date	CITY	LOCATION
TUE JUN 17	NORTH BAY Time: 10AM – 2PM Registration: 9:30 AM	Clarion Resort Pinewood Park 201 Pinewood Park Drive, North Bay Phone: (705) 472-0810
WED JUN 18	SUDBURY Time: 10AM – 2PM Registration: 9:30 AM	Howard Johnson Plaza Hotel 1696 Regent Street, Sudbury Phone: (705) 522-0600
THU JUN 19	TIMMINS Time: 10AM – 2PM Registration: 9:30 AM	Cedar Meadows Resort 1000 Norman Street, Timmins Phone: (705) 268-5800
TUE JUN 24	SAULT STE. MARIE Time: 11AM – 3PM Registration: 10:30 AM	Bay Front Quality Inn 180 Bay Street, Sault Ste. Marie Phone: (705) 945-9264
WED JUN 25	THUNDER BAY Time: 10AM – 2PM Registration: 9:30 AM	Fort William Historical Park Visitor Centre – Point de Meuron Room Phone : (807) 577-8461
THU JUN 26	DRYDEN Time: 11AM – 2PM Registration: 10:30 AM	Best Western Motor Inn 349A Government Street, Dryden Phone: (807) 223-3833

Organization:	
Name:	Name:
Title:	Title:
Telephone:	Telephone:
Email:	Email:

Forum locations have been selected to reach tourism stakeholders throughout the province.

RSVP by: June 12, 2003
Disponible en français

Fax: (416) 314-6976, or Email form to: otmp.sales@mczcr.gov.on.ca

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Please indicate the meeting you will attend	Date	CITY	LOCATION
☐	MON JUN 16	ORILLIA Time: 10AM – 2PM Registration: 9:30 AM	Travelodge Hotel - Sundial 600 Sundial Drive, Orillia Phone: (705) 325-2233
☐	TUE JUN 17	PETERBOROUGH Time: 10AM – 2PM Registration: 9:30 AM	Peterborough Navel Association 24 Whitlaw Street, Peterborough Phone: (705) 749-3588
☐	WED JUN 18	BROCKVILLE Time: 10AM – 2PM Registration: 9:30 AM	Royal Brock Hotel 100 Stewart Blvd., Brockville Phone: (613) 345-1400
☐	THU JUN 19	OTTAWA Time: 10AM – 2PM Registration: 9:30 AM	Ottawa Congress Centre 55 promenade du Colonel By Drive, Ottawa Phone: (613) 563-1984
☐	MON JUN 23	TORONTO Time: 10AM – 2PM Registration: 9:30 AM	Sheraton Centre Toronto 123 Queen Street West, Toronto Phone: (416) 361-1000
☐	TUE JUN 24 ☆	NIAGARA FALLS Time: 10AM – 2PM Registration: 9:30 AM	Best Western Cairn Croft Hotel 6400 Lundy's Lane, Niagara Falls Phone: (905) 356-1161
☐	WED JUN 25 ☆	WINDSOR Time: 10AM – 2PM Registration: 9:30 AM	Holiday Inn Select 1855 Huron Church Road, Windsor Phone: (519) 966-1200
☐	THU JUN 26 ☆	KITCHENER Time: 10AM – 2PM Registration: 9:30 AM	Four Points by Sheraton Kitchener 105 King Street East, Kitchener Phone: (519) 744-4141
☐	FRI JUN 27 ☆	OWEN SOUND Time: 10AM – 2PM Registration: 9:30 AM	Days Inn Owen Sound 950 – 6 th Street East, Owen Sound Phone: (519) 376-1551
☐	THU JUL 3 ☆	LONDON Time: 10AM – 2PM Registration: 9:30 AM	Ramada Inn London 817 Exeter Road Phone: 519-681-4900

☆ Southern Ontario Tourism Organization will present their 2004 Marketing Plan at these locations following the OTMPC presentation (from 2:00 PM to 3:30 PM).

Organization:	
Name:	Name:
Title:	Title:
Telephone:	Telephone:
Email:	Email:

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