

Ontario Tourism Marketing Partnership MARKETING UPDATE

News ✦ Events ✦ Business Opportunities

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OFFICE OF THE PRESIDENT & CEO

June has been a very busy and demanding month for OTMPC and the tourism industry. The Tourism Recovery Office is up and running, and OTMPC is working closely with the recovery team reviewing proposals and partnerships on a weekly basis. *Tourism Recovery Update* has just been posted on www.tourismpartners.com. I urge you to visit the site frequently for recovery details and OTMPC partnership information.

Our annual Partnership Forums are underway in 16 communities across Ontario. OTMPC staff are reviewing Tourism Recovery Program details with the industry and seeking feedback on future product and publications strategies and a proposed new sales calendar. Results from the forums will be reported in the July issue of *Marketing Update*.

User sessions at www.ontariotravel.net slowed amid the Iraq War and SARS outbreak, but by the end of May, they returned to 2002 levels. This is likely a result of heavy OTMPC domestic advertising and consumers' ability to order publications online. Fulfillment requests were up by 57% in May over the same period as last year.

Focus groups conducted on May 30 in the U.S. indicate that Americans are still reluctant to travel to Ontario, even if good travel packages are available. We've seen more positive attitudes towards travel in the domestic market, especially where good value packages are offered.

ONTARIO

More to discover

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

CONTACT

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BOARD NEWS

The OTMPC Board of Directors met in Toronto June 11 and 12 with Anne Marshall of Elmhirst's Resort as the newly appointed Chair. Anne is active in the tourism industry and has been a board member since 2001 and the first Chair of the Outdoor Committee.

OTMPC would like to thank former Chair John Williams, whose term expired recently. John has served on the board since 1999. His leadership over the last two years as Chair was instrumental in guiding OTMPC through many challenges, including 9/11.

CONTACT

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CONCERT FOR TORONTO

The "Concert for Toronto" was a huge success. More than 70,000 music fans came from as far as British Columbia, California, Newfoundland, Northwest Territories, Kansas and Wyoming to enjoy the likes of Avril Lavigne, Barenaked Ladies, Diana Krall and Our Lady Peace. Media reaction was extensive and positive. Toronto restaurants and attractions reported high-volume business.

CONTACT

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MARKETING TO QUEBEC

We are targeting the Quebec market this summer with inserts and direct-mail in Montreal. Our Montreal Station Domination partnership ran the month of June with more than 20,000 Ontario tourism brochures distributed daily to commuters.

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E-MARKETING SUCCESS

As of June 15, consumer registrations to www.ontariotravel.net were 44,911, an increase of 7,200 in two weeks. OTMPC domestic advertising campaigns including on-line promotions have contributed to this growth. You can extend exposure for your business, through OTMPC's consumer web site by registering for a FREE listing at: www.tourismpartners.com

More and more consumers are choosing to order OTMPC publications online from www.ontariotravel.net. Thirty eight per cent of fulfillment orders were made online in the month of May.

CONTACT

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OTMPC HOSTS ONTARIO TRAVEL MEDIA

OTMPC hosted the June 24 meeting of the Travel Media Association of Canada's (TMAC) Toronto Chapter. More than 75 travel writers attended the chic evening held at Mill Street Brewery, a new microbrewery in the heart of Toronto's Distillery Historic District. Tourism and Recreation Minister Brian Coburn was greeted warmly by the writers and won their applause when he announced the creation of a new annual Ontario Tourism Writers' Award.

CONTACT

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NORTHERN CAMPAIGN TARGETS CLEVELAND & MINNEAPOLIS

FedNor teamed with OTMPC on a TV, direct-mail and online campaign. The 30-second TV spot aired during June in Cleveland and Minneapolis. Call to action: KeyTours' Northern Ontario packages. Adventure and Angling direct-mail included contests on two microsites which garnered 1,400 registrations for adventure programming and 3,050 registrations for angling programming.

The Northern Ontario Tourism Association Partners (NOTAP), in partnership with OTMPC, are currently developing a cooperative newspaper insert that will feature late summer/early fall getaway packages to the six northern regions. Insertion will take place the weekend of August 9.

Distribution will include 400,000 inserts in the *Detroit Free Press* and the *Minneapolis Star* as well as 600,000 in the *Toronto Star* and *Winnipeg Free Press*. Advertising opportunities are still available in this piece.

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"JOURNEYS OF DISCOVERY"

Journeys of Discovery, an alliance of cultural heritage tourism partners, was launched to great fanfare on June 3 on the beautiful grounds of Parkwood Estate and Gardens in Oshawa. The alliance involves 65 industry partners offering 22 historic experiences ranging from Uncle Tom's Cabin in Dresden to Bonnechere Provincial Park in the heart of the Ottawa Valley. Ontario and Quebec travel media were treated to a traditional social tea complete with antique cars and costumed interpreters. For further information visit: www.journeysofdiscovery.ca

CONTACT

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PARTNERSHIP OPPORTUNITY

If you're interested in showcasing your event, attraction or association there's an opportunity at this year's Molson Indy in Toronto from July 11-13. Space is limited and organizations are responsible for any "hard" costs. Expected attendance at this year's race is 170,000.

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 emails or fax information 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

May 2003: Issue N^o15

HIGHLIGHTS

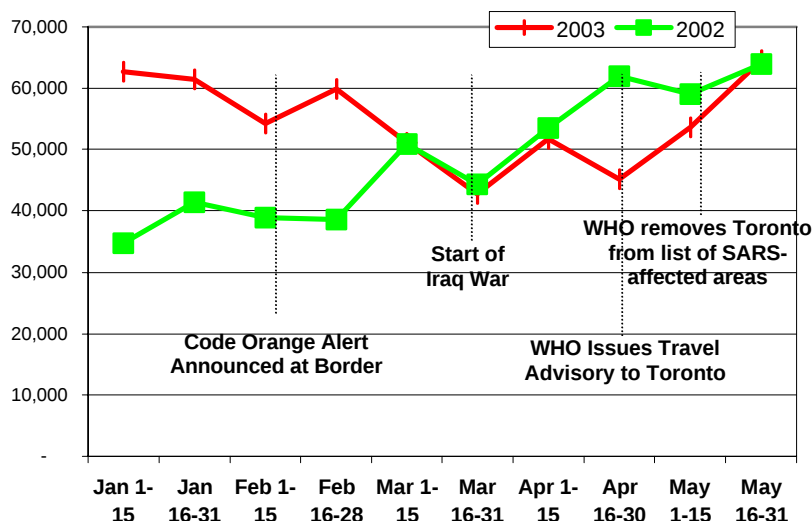
- User sessions with OntarioTravel.net slowed amid SARS and the War. By the end of May, though, user sessions returned to a level in line with 2002.
- To June 16, registrations with OntarioTravel.net totalled 45,000! Opt-ins equalled 28,500!
- User sessions with TourismPartners.com grew 35% over May 2002!
- In May, fulfillment requests jumped 57% over last May!

WEB SITES

CONSUMER SITE – www.OntarioTravel.net

- Between January and May, user sessions at Ontario Travel.net slowed with major announcements relating to SARS and the Iraq War.
- User sessions fell most below last year's levels (-25%) between April 23 and 30 when the WHO advisory against travel to Toronto was in effect.
- On May 14, when the WHO announced the removal of Toronto from its list of SARS-affected areas, user sessions began their return to a level in line with 2002.

War, SARS Hindered Growth in User Sessions: Jan 1- May 31, 2003 vs. Jan 1-May 31, 2002

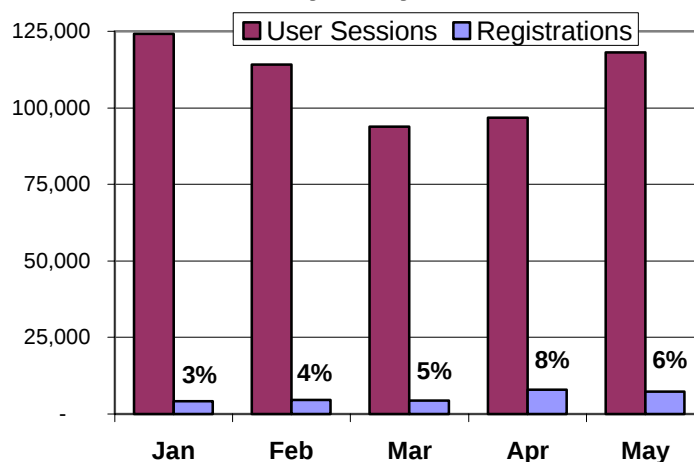


- User sessions for the entire month of May totalled 118,100, a drop of 4% over May 2002.

REGISTERED CONSUMERS

- Consumer registrations with OntarioTravel.net grew in volume January to May despite the slowdown in user sessions March to May.
- In May, 6% (7,400) of user sessions resulted in consumer registrations. Four months earlier in January, just 3% (4,100) of a greater amount of user sessions resulted in consumer registrations.
- It seems likely that multiple marketing tactics directing consumers to OTMPC MicroSites, like Spring and Summer postcards and contests, were responsible for the greater proportion of consumer registrations in April and May.

User Sessions Resulting in Registrations: January - May 2003



- From the site launch to June 16, registrations with OntarioTravel.net totalled 45,000!
- Even more impressive are opt-ins. To June 16, 28,500 consumers opted to receive e-marketing material from OTMPC!

PARTNERS SITE – www.TourismPartners.com

- In May, user sessions with TourismPartners.com totalled 4,500, an increase of 35% over May

2002. User sessions at the site over a one-month period have never before been this high!

- User sessions were strongest toward the beginning of May, the increased response seeming to come on the heels of government announcements of plans designed to rejuvenate Ontario tourism.
- The most downloaded publication (1,770 downloads) from TourismPartners.com in May was OTMPC's 2003-04 Marketing Plan. A sign of the times, May's next most popular download (1,048 downloads) was OTMPC President Bill Kenny's update on the Assurance and Recovery Programs in light of SARS.

REGISTERED PARTNERS

- From the site launch to June 16, 2,900 partners registered with TourismPartners.com.

CALL CENTRE

- Calls to the Call Centre in May dropped 13% over May 2002. May's decline represented the smallest year-over-year drop in call volume this year, as call volume January to April dropped 29% over January to April 2002. Despite this, calls in May were lower in volume than in any May in the past five years.
- Call Centre agents were offered the largest volume of calls (771) for a Wednesday in May on May 28, the day OTMPC's Union Station event took place.
- In May, 83% of calls came from Canadians and 17% from Americans. Pre-SARS, in January and February, calls from Americans averaged 19% of total calls.

FULLFILLMENT CENTRE

- 48,700 fulfillment pieces were requested in May by Canadians (83%), Americans (15%) and overseas residents (2%).
- 57% more fulfillment pieces were distributed to consumers in May than in May 2002! A same amount of kits were available this May as last.
- Growth in distribution in May likely came from consumers' new ability, versus last May, to order fulfillment pieces online at OntarioTravel.net.
- 18,300 (38%) pieces in May were distributed thanks to online orders. Without these online orders, fulfillment

distribution would have fallen over last May.

- A stronger call-to-action this May versus last in OTMPC's Summer campaign for consumers to request fulfillment guides may also have contributed to the rise in distribution.
- OTMPC's 'Rush Hour' TV ad in May urged consumers to request Summer guides, while not all spots running last May did. As well, a greater amount of Summer, Angling and Adventure postcards were dropped this May versus last; all urging consumers to request free guides.
- Among May's top ten fulfillment requests were OTMPC's Summer Experience Guide and Road Map pictured on the Summer postcard, the Summer Events Guide pictured in OTMPC's 'Rush Hour' TV spot, the Fish Ontario Guide shown on the Angling postcard and the Adventure Guide on the Adventure postcard.

Top Ten Fulfillment Requests: May 2003

	Fulfillment Piece / Kit	Quantity Distrib'd
1	2003 Ontario Reference Guide	6,005
2	Ontario Road Map	7,493
3	2003 Summer Experience Guide	4,947
4	2003 Summer Events Guide	3,815
5	2003 Ontario Parks Guide	3,571
6	2003 Adventure Guide	2,485
7	Attractions Ontario Passport	2,227
8	Backroads and Getaway Guide	1,868
9	2003 Fish Ontario Guide	1,605
10	2003 Spring Experience Guide	1,443

ONLINE PUBLICATIONS

- A likely result of OTMPC's Summer advertising, the Summer Experience (5,428 downloads) and Events (4,003 downloads) Guides were the most downloaded publications from OntarioTravel.net in May.
- The 'Traveler's Update' (2,916 downloads) on SARS was the third most popular file downloaded from OntarioTravel.net.

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