

Ontario Tourism Marketing Partnership MARKETING UPDATE

News ✶ Events ✶ Business Opportunities

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OFFICE OF THE PRESIDENT & CEO

OTMPC continues to pursue and refine its "experience-based" marketing strategy to attract visitors to Ontario. Our research indicates for trip planning 48% of consumers choose "type" of trip first, 24% choose "destination" first and 22% selected "trip type" and "destination" as having equal importance. At the September board meeting, the board approved a new experience-based marketing strategy outlining Ontario's signature experiences and a new publications strategy to support these experiences. Our integrated approach helps to differentiate the OTMPC's role from that of DMOs and other marketing organizations focusing primarily on destination advertising.

Our new Sales Calendar and "Outlook 2004-2005" will be available in October and we look forward to any comments you may have about our marketing programme and sales opportunities.

I am pleased to announce Nicole Papineau has joined the OTMPC as Direct Sales Manager. Nicole began her career in the Tourism Marketing Branch of the Ministry of Tourism and Recreation in 1985. Since that time she has also worked for Ontario Place Corporation and the Ontario Science Centre. She brings a wealth of knowledge to the OTMPC and I welcome her to our team.

Many operators are now indicating that August was a relatively strong month for tourism business and September is also expected to be strong. Although visitation numbers have not rebounded fully, our research indicates intentions to visit Ontario is improving.

ONTARIO
More to discover

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

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OTMPC WINTER 2003 MARKETING CAMPAIGN SHOWED GREAT ROI

IBM Consulting tracking analysis concludes the OTMPC near-border winter campaign was extremely effective in stimulating travel to Ontario in spite of the fact that it ran from January through February 2003, at a time when the widely expected war with Iraq and terrorist alerts were negatively impacting travel. It is estimated U.S. near-border residents took 168 thousand trips as a result of OTMPC advertising, generating \$45 million in incremental revenues to the province.

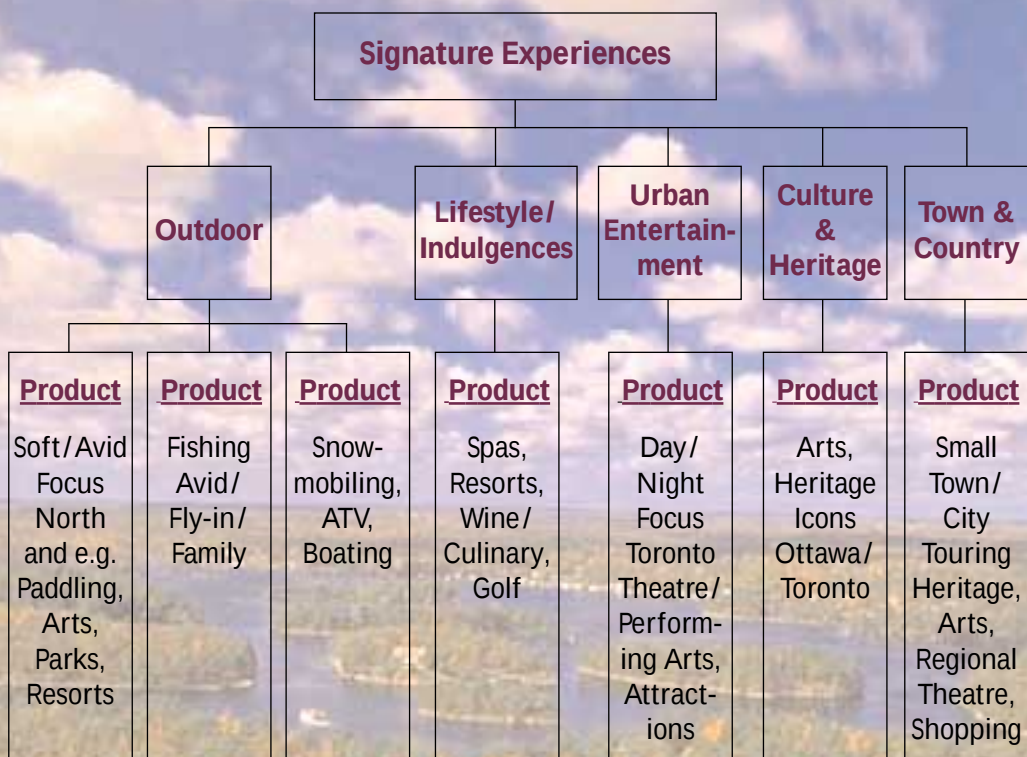
For every advertising dollar spent by the OTMPC, approximately \$28 was generated in tourism revenue, the highest return on investment achieved across the 2002 campaigns in the U.S. border market.

CONTACT

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ONTARIO'S SIGNATURE EXPERIENCES!

To better integrate product development and marketing efforts, the OTMPC has developed a framework to guide our efforts and our industry partners as outlined below. This framework will guide our product development programmes and marketing programmes.



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NEW ATTRACTIONS TRADE SHOW!

Just a reminder the OTMPC in partnership with the Ontario Motor Coach Association (OMCA) and Attractions Ontario is organizing an Ontario Attractions Trade Show, taking place on Sunday November 2, 2003 (10:00am - 1:00pm). A limited number of spaces are still available for the show, which will be held at the Westin Harbour Castle Hotel in Toronto.

This is a fantastic opportunity to promote tourism product to more than 80 tour operators and group travel organizers who will be coming from Ontario, the near border states and other provinces. The objective is to offer the travel trade one-stop shopping to obtain key information on Ontario so that they can plan their tours and brochures for 2004-2005. Suppliers can register on-line at www.omca.com

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www.omca.com

TRAVEL TRADE IN THE U.S.A.

On Saturday, September 13, OTMPC, Tourism Toronto Niagara Falls Tourism, Canadian Tourism Commission, Fairmont Royal York Hotel, Mirvish Productions and Niagara Airbus hosted the National Tour Association (NTA) Board of Directors to a lunch meeting in preparation for the NTA Convention, which will be held in Toronto for the first time in 2004. The NTA group indicated they were pleased with the event and are looking forward to bringing NTA to Toronto in 2004.

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NORTHERN MARKETING

Snowmobile Marketing Campaign is Underway!

OTMPC launched this year's Snowmobile Marketing Program on September 15.

The new program in partnership with the Northern Ontario Travel Associations (NOTAPs) and the Ontario Federation of Snowmobile Clubs (OFSC) includes a new snowmobile guide, "Easy Riders", consumer shows, an advertising campaign and an on-line snowmobile contest launched September 15, 2003. E-mails were sent to the OTMPC database directing them to the snowmobile site. Consumers can also access the site from www.ontariotravel.net. So far the OTMPC has had its busiest response ever with 4,200 snowmobile contest entries in just 10 days!

50,000 copies of "Easy Riders" will be distributed at major snowmobile shows which includes:

- * Syracuse, NY
- * Winnipeg, MB
- * Milwaukee, WI
- * Grand Rapids, MI
- * York, PA
- * Quebec City, PQ
- * Niles, OH
- * Novi, MI
- * Greenbay, WI
- * Minneapolis, MN
- * Toronto International Snowmobile Show, Toronto, ON
- * Supertrax Show, Toronto, ON

The NOTAPs and the OTMPC's Northern Tourism Marketing Staff have worked together to brand the Ontario aisles and booths at all of the consumer snowmobile shows.

The OTMPC would like to apologize for omitting Ian McMillan's name from the Northern Tourism Marketing Committee in the August issue of Marketing Update. Ian McMillan is the Director of Tourism for Sault. Ste. Marie and has been very active in promoting Northern Ontario for the past 20 years

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PARTNERSHIP NEWS

ABA Recognizes Two Ontario Events!

On September 8, 2003, the American Bus Association (ABA) in Washington, D.C. announced its selection of the 100 Top Events in North America for 2004. This year's announcement included two winners from the province of Ontario. They include the 2004 London International Dragons Lair Jousting Tournament to be held in London, Ontario July 9 - 11, 2004 and the Lilac Festival, to be held in Hamilton, Ontario May 23, 24, and 30, 2004. Congratulations Hamilton and London! NTA's news release was distributed to 1,500 media contacts in the U.S. and Canada. ABA is also distributing 9,000 copies of their special trade supplement to key trade contacts throughout the U.S. Information about Ontario Events is posted on the ABA website www.buses.org

Sudbury Hosts Ontario Chapter of TMAC

The City of Greater Sudbury and Dynamic Earth hosted the September Meeting of the Ontario Chapter of the Travel Media Association of Canada (TMAC) on September 23 in Toronto at Sassafras Cafe, where they did a multi-media presentation on the real story of Sudbury and the new Dynamic Earth Attraction. About 70 members and guests attended the event. Partners at the event included Doug Nadorozny, General Manager of Economic Development and Planning Services; Rob Skelly, Manager of Tourism; Ian Wood, Tourism Coordinator; Shawn Poland, Business Development Officer; Mia Boiridy, Director of Dynamic Earth; Stephanie Deschenes, Marketing Communications Specialist, Science North and Meredith Armstrong, Coordinator, Partners in Eco-Adventure Tourism (PEAT).

Northumberland Tourism Launches New Travel Brochure

Northumberland Tourism distributed 200,000 copies of its "Experience Our Northumberland - Fall/Winter 2003" publication to Toronto Star subscribers on September 13. Partners in the program included the Municipalities of Brighton, Port Hope, Trent Hills, Town of Cobourg, and Classical 96.3/103.1 FM. The 20 page full-colour brochure highlights vacations opportunities and new overnight packages to the area.

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HAVE YOUR SAY!

Please direct feedback and comments 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

August 2003: Issue N^o18

HIGHLIGHTS

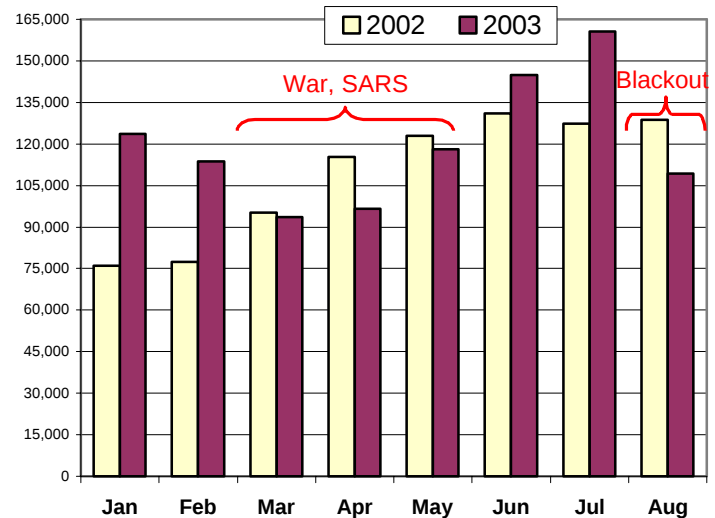
- 'Blackout 2003' on August 14, followed by Ontario's state of emergency and power restrictions to August 25, disrupted daily life for millions in North Eastern North America. It also affected consumer response.
- User sessions at OntarioTravel.net declined 15% in August over August 2002. Year-to-date, user sessions are up (+10%) over last year.
- User sessions at TourismPartners.com fell 9% in August over August 2002. Year-to-date, user sessions are up (+21%) over last year.
- Despite the Blackout, fulfillment requests increased 47% in August over August 2002!
- To date, 35,100 consumers have opted to receive e-marketing material from OTMPC!

WEB SITES

CONSUMER SITE – www.OntarioTravel.net

- User sessions at OntarioTravel.net in August fell 15% below the level achieved in August 2002. Blackout 2003 contributed to the decline.
- As more than 50 million people across eight U.S. states and Ontario lost power on August 14, user sessions at OntarioTravel.net for the three days following averaged just 2,463 per day. August 1 to 13, user sessions averaged 4,208 per day.
- It is also possible that user sessions slowed in August after a record-high level was achieved in July. Prior to the Blackout (August 1 – 13), user sessions were down 12% versus the same period in 2002.
- In August, user sessions were greatest in volume on August 1, probably in relation to the upcoming Canadian long weekend.
- Despite the drop in user sessions in August, gains achieved before and after the War and SARS boosted user sessions for the period January to August 10% over the same period in 2002.

**User Sessions at OntarioTravel.net:
Jan - Aug, 2003 vs. Jan - Aug, 2002**



REGISTERED CONSUMERS

- As of September 4, 55,829 consumers were registered with OntarioTravel.net. 1,940 of these registrations were generated in August.
- Of the registered consumers in OTMPC's database:
 - There is nearly an even split between female (51%) and male (49%) consumers.
 - 96% of consumers are English; 4% are French.
 - 74% of consumers are Canadian, 22% are American and 4% are overseas residents.
 - 35,100 consumers have opted to receive e-marketing material from OTMPC!

PARTNERS SITE – www.TourismPartners.com

- User sessions in August at TourismPartners.com totaled just over 2,900, a drop of 9% over August 2002. Blackout 2003 sparked the decline.

Note: There was no disruption to Web / Call Centre service during Blackout 2003.

CONSUMER RESPONSE UPDATE

August 2003: Issue N^o18

- Prior to the Blackout (August 1 – 13), user sessions, averaging 112 per day, were more than double those achieved during the same period in 2002. For the three days following the Blackout, user sessions averaged just 46 per day.

- User sessions picked up on August 25 as three levels of government employees across Ontario went back to work, but not enough to recover sessions back to the level achieved in August 2002.

- August user sessions at TourismPartners.com were greatest in volume (208) on August 7, when Premier Eves announced \$1.9 million in funding for tourism projects across Niagara to help the region recover from the economic effects of SARS.

- The most downloaded file from TourismPartners.com in August was OTMPC's 2003 – 2004 Marketing Plan (1,147 downloads).

REGISTERED PARTNERS

- As of September 4, 3,300 partners were registered with TourismPartners.com. 200 of these registrations were generated in August.

CALL CENTRE

- In August, nearly 43,900 calls were received at the Call Centre, a drop of 11% over August 2002.

- In August, calls offered to agents were greatest in volume (989) on August 1, probably in relation to the upcoming Canadian long weekend.

- For a Saturday in August, calls offered to agents were highest on August 9. Perhaps the boost in calls was the result of the Northern Lure Insert drop in Toronto and Winnipeg on the same day. The Insert listed 1-800-ONTARIO as a call-to-action.

- In August, 85% of calls were placed by Canadians. Of this, the majority (85%) came from Ontarians. 15% of calls were placed by Americans. Of this, the majority (67%) came from those in Ontario's border states.

FULFILLMENT CENTRE

- In August, 25,200 fulfillment pieces were distributed to residents of Canada (81%), the U.S. (16%) and overseas (3%).

- Fulfillment requests in August increased 47% over those in August 2002!

- In August, 18% of (or 4,430) fulfillment pieces were ordered online. These online orders helped boost calls over 2002, as fulfillment orders could not be made online in August 2002.

- A strong call to action for consumers to request summer guides in OTMPC's 2003 summer campaign also seemed to help fulfillment orders grow over 2002. The push for guides was not as strong in OTMPC's 2002 summer campaign.

- For the summer season (May – August), four times as many Summer Events Guides and 3 times as many Summer Experience Guides were ordered than in the same period in 2002.

Top Five Fulfillment Requests: August 2003

	Fulfillment Piece / Guide	Quantity Distributed
1	Ontario Road Map	4,002
2	Ontario Reference Guide	2,504
3	Summer Experience Guide	2,115
4	Ontario Parks Guide	2,068
5	Attractions Ontario Passport	1,546

- Consumers were also thinking about Fall travel planning in August. 1,022 Fall Experience and 835 Fall Events Guides were ordered in August.

ONLINE PUBLICATIONS

- In August, the Summer Experience Guide (9,244 downloads) and the Fall Events Guide (4,777 downloads) were the most downloaded publications from OntarioTravel.net.

Note: There was no disruption to Web / Call Centre service during Blackout 2003.