

Ontario Tourism Marketing Partnership MARKETING UPDATE

News ♦ Events ♦ Business Opportunities

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OFFICE OF THE PRESIDENT & CEO

Happy New Year from the Ontario Tourism Marketing Partnership Corporation (OTMPC)!

As we begin the new year Marketing and Product Committees are working to define marketing strategies for 2004-2005. This includes aggressive advertising campaigns for the spring and summer seasons. The campaigns are being developed using the latest findings from the Ministry of Tourism and Recreation's (MTR) Travel Intentions Study completed in November 2003.

There is strong evidence from the study to suggest Ontario and Toronto in particular have been stigmatized by the occurrence of SARS. Approximately 600,000 Canadians and more than four million Americans are inclined to reduce or eliminate travel to or within Ontario during the winter and spring seasons because of SARS. Americans who live in close markets such as Buffalo and Rochester have become less concerned about the SARS outbreak. This survey will soon be posted on the MTR web site and will be linked to the OTMPC partners site at www.tourismpartners.com. Clearly, we need to design our marketing approach in a targeted way with the best market intelligence available.

ONTARIO
More to discover

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

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MEETINGS CONVENTIONS & INCENTIVE TRAVEL STRATEGY

The MC&IT Strategy has been developed and was presented to the North America Committee on January 22, 2004. The new strategy will be incorporated as part of OTMPC North America marketing strategy. Vicki Owen has been appointed as OTMPC's MC&IT Coordinator and will support the activities of the OTMPC's MC&IT Sub-Committee. Committee Members include: Britta Winther, London Convention Centre (Chair), Chair, Grace Cerniuk, Resorts Ontario (Vice Chair), Betty Blair, Conference and Incentive Plus, Joan Culliton, Ottawa Congress Centre, Sal Farrauto, Hamilton Convention Centre, John Houghton, Metro Toronto Convention Centre, Joyce Morocco, Niagara Falls Tourism, Gordon Orr, Convention & Visitors Bureau of Windsor, Essex County & Pelee Island, and John Rhynas, Rhynas Incentives International.

CONTACT

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NEW ANGLING CAMPAIGN UNDERWAY!

The Northern Tourism Marketing Committee and the Outdoor Committee approved the Angling Strategy for 2004-2005 at a joint meeting held in Sudbury.

OTMPC is partnering with the Northern Ontario Travel Associations to distribute and market the new 2004 *Angling Guide* which has now been released. Angling in Ontario

CONTACT

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NEW ANGLING CAMPAIGN UNDERWAY!

will be promoted by the NOTAPS at 18 consumer sport angling shows including:

All Canada Show	Chicago, Illinois
Cincinnati Sports & Boat Show	Cincinnati, Ohio
Chicagoland Angling Show	Chicago, Illinois
Greater Philadelphia Show	Fort Washington, Pennsylvania
Sports, Travel & Outdoor Show	Harrisburg, Pennsylvania
Columbus Sport & Boat Show	Columbus, Ohio
Outside Travel Expo	Chicago, Illinois
2004 Outdoor Adventure Show	Toronto, Ontario
Indianapolis Boat & Sport Show	Indianapolis, Indiana
Outdoorama Sport and Travel Show	Novi, Michigan
2004 Spring Fishing Show	Toronto, Ontario
The Cottage, Camping and Vacation Show	Winnipeg, Manitoba
Minneapolis Sport Show	Minneapolis, Minnesota
Michigan Boat, Sport and Fishing Show	Fort Field, Michigan
Eastern Fishing & Outdoor Exposition Show	Suffern, New York
Milwaukee Journal Sentinel Sports	Milwaukee Wisconsin
Cleveland Sport & Travel Show	Cleveland Ohio
Toronto Sportsman Show	Toronto, Ontario

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ADVERTISING OPPORTUNITIES - SPRING/SUMMER

The Spring Experience Guide and the spring promotion at Union Station are sold out and **now is the time to book your space for our summer opportunities.**

Union Station Domination June 2004 Program

There are very few dates left for the June promotion.
Reserve now to avoid disappointment!

Summer Experience Guide & Venez Chez Nous

A reminder that booking deadlines for the *Summer Experience Guide* and *Venez Chez Nous* have been extended to **February 5**.
The "Summer" newspaper insert deadline is **February 13**.

Spring / Summer Banner Ads

The spring/summer banner ad/sponsored links contract went out last week.
Space is selling quickly. Ads go live beginning **March 1**.

Travel Trade

Advertising opportunities in some of North America's top travel trade magazines under the Ontario brand are still available.

CONTACT

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ADVERTISING OPPORTUNITIES - SPRING/SUMMER

Opportunities include: *Courier*, *Destinations*, and *Group Tour Magazine* supported by the OTMPC.

The Partnership Development and Sales unit is now fully staffed with Nicole Papineau, Partnership Development and Sales Manager, Kelly Johnston, Partnership Development and Sales Co-ordinator and Brynda Browning, Partnership Development and Sales Assistant.

Please contact Brynda Browning if you have any further inquiries about these and other great advertising opportunities!

CONTACT

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LAUNCHING SOON - NEW ONTARIO OUTDOOR ADVENTURE CAMPAIGN

Gord Baker, Assistant General Manager of Algonquin Outfitters and Vice-Chair of the Outdoor Committee notes, "The Outdoor Committee is really excited about the content focus of the new outdoor web site. This has been a most positive step forward for outdoor tourism operators in Ontario."

The campaign will launch with a spring/summer focus initially. The fall/winter components will be developed later this spring for an in-market date of mid-August.

Partner buy-in opportunities - banners and buttons on the new outdoor microsite can be obtained by e-mailing to otmp.sales@mczcr.gov.on.ca. Note, information on spring/summer buy-in opportunities will be e-mailed to industry contacts by mid-February. The range of experiences this programme features includes:

Arts and
Wonders

Cycling

Hiking

Nature
Viewing

Fly-in and
Rail
Adventures

Water
Adventures

CONTACT

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"CONAN IN TORONTO"

NBC Television will tape its popular late-night talk show in Toronto. OTMPC has been working with the Ministry Tourism Recovery Office to bring "Late Night with Conan O'Brien", to Toronto February 10 to 13 as part of a public relations strategy to help promote Ontario in U.S. markets. The show is very popular in the U.S. and the Toronto taping should raise awareness about both Toronto and Ontario, as vacation destinations. This year will mark the 10th anniversary of the programme and it will also be the first time that it has been taped outside the U.S. The network has received 50,000 ticket orders and there are only 4,000 seats available in total. NBC will set up a lottery to award tickets to the general public. Celebrities on the show will include: **Mike Myers**, **Michael J. Fox**, **Eric McCormack**, **Adam Sandler**, **Ron James**, and musical acts **Nickelback** and the **Barenaked Ladies**.

CONTACT

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PARTNER NEWS!

Urban Green Tourism Going Interactive in 2004

The Green Tourism Association hosted a reception last week for its members, partners and supporters at the Textile Museum of Canada. At the event, Duncan Ross, Executive Director of the City of Toronto's Tourism Division, presented the city's 5 year tourism action plan to the capacity audience. Gary Clarke, President, and Jonathan Stanley, Director of Marketing of Destination Ontario (the web map developer hired by the Association), previewed the new green tourism web map. When launched this spring, the web map will allow visitors to research and map out the urban green tourism options and activities throughout the Toronto region.

The Association is also developing a new initiative in 2004 called The Urban Green Tourism Network an innovative project to connect communities, businesses and tourism organizations across Ontario through the development of a sustainable tourism industry.

Congratulations McMichael Canadian Art Collection!

The McMichael Canadian Art Collection in Kleinburg has won a United Nations World Summit Award (WSA) for excellence and creativity in e-culture for its Art2Life web site. Representatives from the Gallery received the award in Geneva, Switzerland from United Nations Secretary-General Kofi Annan in December. Since its launch over 700,000 visits have generated over 1,000,000 page views. The site is one of only five web sites world-wide to be recognized by the WSA. Visit www.mcmichael.com, click on Art2Life Logo.

Annual TFO Conference March 30-31, 2004

The Tourism Federation of Ontario (TFO) will hold its Sixth Annual Tourism Forum March 30 and 31, 2004 at Casino Rama, Rama (near Orillia). This year's theme - It Is Your Business - Who is in Charge? Keynote speaker, Bill Lamberton, Vice President of Marketing of WestJet will kick off the Forum on March 30. This year's Forum will feature several workshops and concurrent sessions on various topics designed to appeal to the tourism sector.

To register for the Forum, please contact Georgina Smith of GD Smith Event Planning for more information or to register for the Tourism Forum.

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HAVE YOUR SAY

Please direct feedback and comments about Marketing Update to Tom Boyd, Corporate Communications at email: tom.boyd@mczcr.gov.on.ca or Marie Hewak, Board and Committees Co-ordinator at 416-314-7566 or email: marie.hewak@mczcr.gov.on.ca

To update your company emails or fax information, contact Brynda Browning, Partnership Development and Sales Assistant 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

December 2003: Issue N°22

HIGHLIGHTS

Although one of OTMPC's most challenging years to date, consumer response to its web sites and fulfillment centre grew over 2002!

- User sessions with OntarioTravel.net grew 8% over 2002, the growth a likely result of OTMPC's additional investment in 2003 (over 2002) in contests and advertising which drove to the web.
- As 2003 ended, 93,500 consumers were registered with OntarioTravel.net! Of those registered, 57,400 opted to receive e-marketing material from OTMPC!
- User sessions with TourismPartners.com grew 30% over 2002!
- As 2003 ended, 4,900 partners were registered with TourismPartners.com!
- Calls to the Call Centre dropped 20% over 2002.

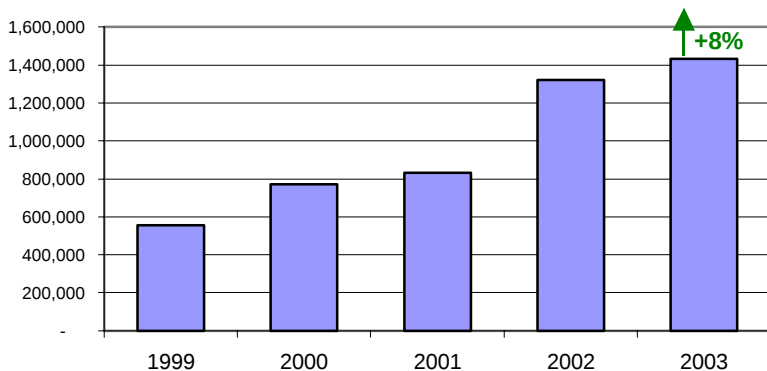
CONSUMER WEB SITE – www.OntarioTravel.net

User Sessions

▪ User sessions at OntarioTravel.net in December grew 13% over December 2002 to total 115,900!

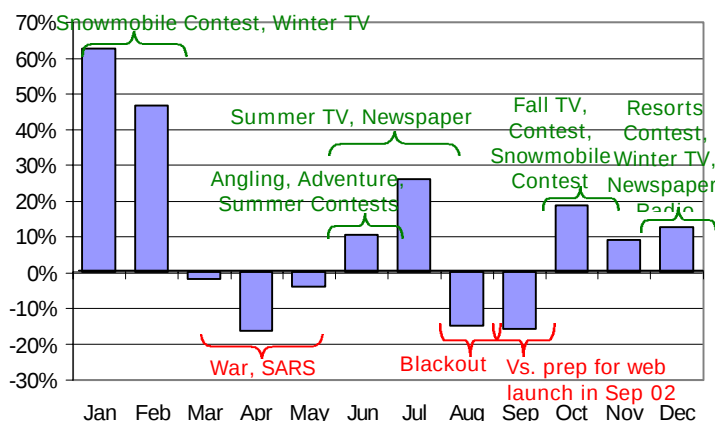
- User sessions with OntarioTravel.net in December, averaging 3,700 per day, were greatest in volume on the 16th, when they tripled to 11,700 for the day! OTMPC's Winter TV spot, which advertised the site, began to air December 16.
- December's total brought the number of user sessions for 2003 to 1.4 million, an increase of 8% over 2002!
- For the past 5 years, user sessions with OTMPC's consumer web site have grown steadily each year.

User Sessions with OTMPC's Consumer Web Site: 1999 – 2003



- Growth in user sessions at OntarioTravel.net in 2003 occurred despite the challenging year. Though the impact of events such as War, SARS and Blackout 2003 caused user sessions to fall below 2002 levels, OTMPC contests and advertising drove a significant enough amount of consumers to the site during the remainder of the year to boost user sessions.

Year-over-Year Percentage Change in User Sessions at OntarioTravel.net: 2003 vs. 2002



Consumer Registrations

▪ OTMPC's four live contests in December encouraged 10,400 consumers to register with OntarioTravel.net, ranking December the month with the third highest level of registrations in 2003!

- The majority of registrations in December were made to enter OTMPC's It's Time for a Little T.O. contest.

▪ Though December didn't generate the highest level of registrations for a month in 2003, it did produce the highest conversion of user sessions to registrations for a month in 2003! This high conversion rate can be attributed to the four OTMPC contests in-market in December.

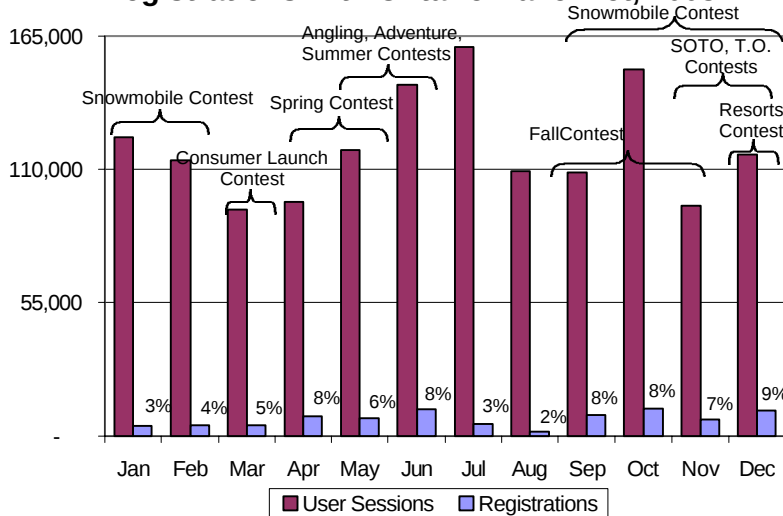
▪ Looking back on 2003, the percentage of monthly OntarioTravel.net user sessions resulting in registrations was higher with OTMPC contests in-market. The conversion rate of user sessions to registrations was lowest in 2003 in August

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(2%) and July (3%) when no OTMPC contests were in-market.

Conversion Rate: User Sessions Resulting in Registrations with OntarioTravel.net, 2003



December's total brought the number of consumer registrations with OntarioTravel.net for 2003 to 82,600.

To date, from the launch of OntarioTravel.net in October 2002 to January 2004, 93,500 consumers have registered with OntarioTravel.net!

Of these registered consumers, 57,400 (61%) have opted to receive e-marketing material from OTMPC!

PARTNERS WEB SITE – www.TourismPartners.com

In December, 4,200 user sessions were recorded at TourismPartners.com, an increase of 52% over December 2002!

December's total brought user sessions for 2003 to 49,600, an increase of 30% over 2002!

Registered Partners

Approximately 250 partners registered with TourismPartners.com in December, bringing the total number of partner registrations to date to 4,900!

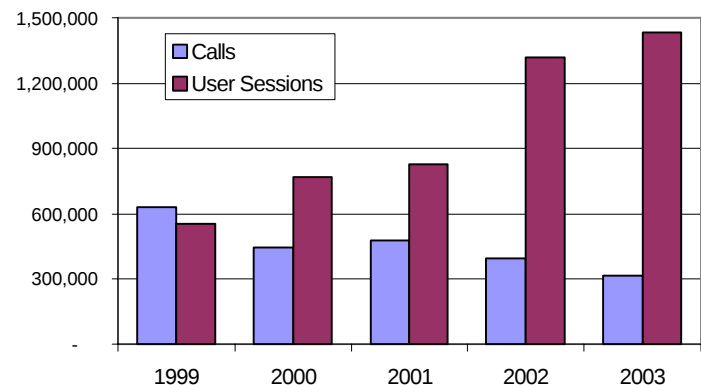
CALL CENTRE

Calls to the Call Centre in December totalled 8,800, a decrease of 21% over December 2002.

December's total brought the number of calls to the Call Centre for 2003 to 317,000, a decrease of 20% over 2002.

Calls to the Call Centre have been declining over the past five years, as consumers' preference for the web (vs. the phone) when seeking travel information has increased. Noting this trend, OTMPC shifted its primary call-to-action in its advertisements from the phone to the web over the past year. This shift also contributed to 2003's decrease in call volume.

Calls to 1-800-ONTARIO Down, User Sessions at OntarioTravel.net Up: 1999 – 2003



Of calls to the Call Centre in 2003, 85% came from Canada; 15% came from the U.S.

85% of Canadian calls originated in Ontario.

62% of U.S. calls originated in the border states.

FULFILLMENT CENTRE

In December, 9,300 fulfillment pieces were distributed to consumers, an increase of 2% over December 2002.

December's total brought the number of fulfillment pieces distributed to consumers in 2003 to 365,300.

For the portion of 2003 comparable to 2002, May to December, the distribution of fulfillment pieces increased 49% over the same period in 2002.

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- Growth in fulfillment pieces distributed in 2003 can be attributed to consumers' new ability, versus much of 2002, to order fulfillment pieces online at OntarioTravel.net. Of fulfillment pieces distributed in 2003, one third (33%) were ordered through OntarioTravel.net. Thus, although publications were available for download, the web increased demand for tangible publications.

- The 5 most popular fulfillment pieces distributed in 2003 are listed in the table below:

Top 5 Fulfillment Requests: 2003

	Fulfillment Piece / Guide	Quantity Distributed
1	Ontario Road Map	58,197
2	Ontario Reference Guide	44,161
3	Summer Experience Guide	33,185
4	Ontario Parks Guide	23,539
5	Adventure Guide	23,397

- Of fulfillment pieces distributed in 2003, the majority (81%) were requested by Canadians. Americans and overseas residents requested 16% and 3%, respectively.

ONLINE PUBLICATIONS

- In December, consumers downloaded 9,300 publications via OntarioTravel.net.

- December's total brought the number of downloaded publications in 2003 to 418,200. More publications (+14%) were downloaded from OntarioTravel.net in 2003 than ordered through OTMPC's fulfillment centre.

- The 5 most downloaded publications for 2003 are listed in the table below:

Top 5 Online Publications: 2003

	Online Publication	Quantity Downloaded
1	Fall Colour Report	67,427
2	Fall Events Guide	53,831
3	Summer Experience Guide	47,963
4	Summer Events Guide	31,956
5	Fall Experience Guide	31,318