

Ontario Tourism Marketing Partnership MARKETING UPDATE

News ✦ Events ✦ Business Opportunities

April 2004 Page 1/5

OFFICE OF THE PRESIDENT & CEO

The OTMPC Board of Directors met on March 30-31, 2004 at Casino Rama Hotel in conjunction with the 6th Annual Tourism Federation of Ontario (TFO) Forum. This year's Forum was a resounding success with attendance of over 270 delegates from across Ontario. Congratulations TFO!

At the meeting on March 30-31, the Board approved the North America, Overseas and Meetings Conventions and Incentive Travel (MC&IT) Strategies for 2004-2005, as well as, the 4-Year OTMPC Marketing Strategy 2004-2008.

OTMPC is in full swing launching the "Summer Campaign" and is hopeful the advertising efforts will facilitate a successful rebound in visitation to Ontario over last year. The "Summer Campaign" includes: a television campaign - 30 second commercials starting the week of May 10 for 3 weeks; newspaper insert distribution on May 8 will be in 18 key Ontario markets with distribution of 900,000 and 6 key U.S. markets on May 9 for a distribution of 450,000 and Union Station Domination in the month of June in partnership with tourism industry partners.

ONTARIO

More to discover

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

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ADVERTISING OPPORTUNITIES

Toronto Star - Saturday "Travel Section" Advertising Opportunity

To build on the success of the 6-page Ontario section in the *Toronto Star's* Saturday "Travel Section" (circulation over 672,000) during the Spring Campaign, OTMPC is **continuing this program for 5 weeks in May-June 2004** as part of our Summer marketing program. Within the 6-page Ontario section in the Saturday "Travel Section", OTMPC will have a 1/2 page 'Ontario' brand ad that will offer 4 spots for partners to feature overnight packages.

Summer Micro-site Advertising

OTMPC will be using a micro-site dedicated to Ontario summer travel ideas and get-aways to promote travel in and to Ontario this summer. This will be the 'call to action' for the OTMPC 'Ontario' branded ads in the *Toronto Star* Saturday "Travel Section" mentioned above, as well as, other advertising as part of the Summer Campaign. Opportunities exist for partners to buy banner/button ads on the summer micro-site to promote their destinations, experiences and products this summer. The summer micro-site will launch in May.

Outdoor Micro-site

Banner ad spaces are still available on the new Outdoor micro site which can be viewed at www.ontariotravel.net/outdoors

Travel Trade Advertising Opportunities

Ad space is still available for the October issues of *Courier Magazine*, the official

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ADVERTISING OPPORTUNITIES

monthly publication of the National Tour Association (NTA) and *Destinations Magazine*, the official monthly publication of the American Bus Association (ABA).

Looking Ahead ! Upcoming Fall Opportunities

Over the next few months, OTMPC will be sending out information on buy-in opportunities for: Fall micro site; Angling micro site; *Snowmobile Paradise Ontario Guide*; *inOntario Magazine* (Winter) and Fall Union Station Domination. More information will be provided in *Marketing Update* and through our broadcast e-mail distribution.

TVO Promotional Opportunity

Partners will have the opportunity to participate in a two-minute vignette which would air 25 times over the next year, beginning in July. Ten spots will be available. Details and pricing to follow.

2004 OTMPC Partnership Forums ... On The Road Again !

The Partnership Forums are happening now. Plan to attend an upcoming Forum on:

April 29	London	Bellamere Country Market & Winery
April 30	Kitchener	Four Points Sheraton Kitchener
May 7	Niagara Falls	Legends of the Niagara Golf Course
May 10	Brockville	Quality Hotel Royal Brock
May 11	Ottawa	National Arts Centre

Francophone Forums (2)

May 11	Timmins	*new*	Days Inn Hotel
May 12	Sudbury	*new*	Howard Johnson Hotel
May 13	Peterborough		Parkway Banquet & Conference Centre
May 14	Owen Sound		Grey Roots: Your Heritage & Visitors Centre

To RSVP or for more information, please contact OTMPC Sales at 1-888-365-4422 or otmp.sales@mtr.gov.on.ca

OTMPC Sales Calendar

If you would like a copy of our Sales Calendar, we would be happy to forward one to you. Please contact Brynda Browning at 1-888-365-365-4422 or visit the partners web site at tourismpartners.com for updates on all buy-in opportunities.

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OTMP JOINT MARKETING INITIATIVES

OTMPC & Niagara Launch \$3.7M Summer Campaign

Ontario Tourism and Recreation Minister, Jim Bradley announced a joint industry partnership program of \$3.7 million for Niagara Falls on April 16, 2004. This Spring/Summer Campaign includes a 20-page U.S. newspaper advertisement supplement, a 30 second television commercial and one-page magazine advertising. In addition to a 20-page insert which focuses on a variety of experiences in the Niagara Region with hotel partners, a separate 16-page attractions-only newspaper insert will be developed for distribution in key Ontario markets, Quebec and select border U.S. markets in late June (500,000 copies).

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OTMP JOINT MARKETING INITIATIVES

OTMPC and CTC Partnerships

Get Going Canada

Toyota Canada Inc. (TCI) in partnership with the Canadian Tourism Commission (CTC) announced the official launch of "Get Going Canada", a new national program, to help boost tourism within Canada by inviting Canadians to "drive the world's greatest country". A key component of the program is the **"Canada's Best Drives" travel guide** with 13 uniquely Canadian drives. BE SURE to see the "Ontario" Section on pages 24 to 31, a collaboration by OTMPC and its partners !

CTC Quebec Newspaper Partnership

CTC Quebec newspaper partnership -1/2 page, four-colour ads x 6 insertions. Timing will be in mid May in major Montreal newspapers both in English and in French.

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MEDIA RELATIONS

2004 Canada Media Marketplace

OTMPC hosted the Opening Reception at 2004 Canada Media Marketplace in Pasadena, California on April 21, 2004. Ontario showcased "Savour Ontario", the culinary vacations alliance including Inniskillin, Konzelmann Estate Winery and Chateau des Charmes; fashion designers, Pam Chorley, Ula Zakowska and Jim Searle and Chrys Tyrell and jazz diva Jane Bunnett. Over 350 Canadian partners and media relations representatives met with U.S. professional travel and lifestyle writers and editors from print, electronic and broadcast consumer and trade publications to exchange the latest Canadian tourism information and to explore story opportunities in a one-on-one appointment structure.

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ANGLING CAMPAIGN

Angling Campaign to "Reel Them In"

OTMPC's Angling Marketing Program for 2004-2005 is ready to go! The cornerstone of the program is our new affiliation with the four leading Angling Television shows in Ontario which will have a major impact on U.S. border markets. The four media companies and their personalities are:

Angling Shows

Real Fishing
Canadian Sport Fishing
Going Fishing
Fish'n Canada

T.V. Hosts

Bob Izumi
Italo Labignan
Darryl Choronzey
Reno and Angelo Viola

Ontario will be the primary focus on three national specialty channels, 39 independent channels for a total of **88 shows per week**. They will be carrying Ontario content, based on Ontario experiences with Ontario locations. In terms of U.S. exposure, the four media companies will appear on the Outdoor Life Network. This will provide exposure to **60 million** households, **10 million** in our target markets of the Great Lakes border states.

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ANGLING CAMPAIGN

Ontario Angler Award Program

Ontario is now the major sponsor for the Ontario Federation of Anglers and Hunters (OFAH) "Ontario Angler Award Program". Anglers can now submit digital photos and data to the OFAH central registry. Digital photos will be posted on the web site within hours and family and friends can see their "catch of the day" including receiving a crest and certificate for their efforts.

OTMPC, in partnership with six NOTAPs, participated at 16 consumer shows in Toronto, Winnipeg and U.S. border cities this Spring. We look forward to seeing you at our Partnership Forums in the North. Make a point of coming to hear more about our marketing programs and initiatives. Your input and advice is welcome and encouraged!

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RENDEZ-VOUS CANADA 2004

This year's Rendez-vous Canada, key travel trade marketplace for Canadian tourism suppliers developing international travel business to Canada, will take place on May 1-5, 2004 at the Palais des Congres de Montreal in Montreal, Quebec. OTMPC and Tourism Toronto will co-host a Client Event on May 4 from 6:30 to 9:00 p.m. at the Ritz Carlton. The themed interactive event is based on the concept of the "Idol" and will involve key buyers to select the "1st Rendez-vous Idol". The Ontario delegation includes over 143 tourism suppliers, DMOs and Ontario-based national tourism organizations.

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TOURISM PARTNER NEWS

Pick Up A Car With One Hand ... or ... Touch A Tornado !

Canada South Science City is a "new" awe-inspiring science and technology centre located in Windsor with over 100 hands-on, interactive exhibits to stimulate and educate all ages. In addition to the exhibits there is Café Natural, Launchpad for Learning (Computer Lab) and the Bean Bag Theatre. Visit us at www.cssciencecity.com

TFO Honours !

Congratulations to Anne Marshall, Peter Elmhirst and Greg Elmhirst of Elmhirst's Resort who received the 2004 TFO Award for Excellence in Tourism Human Resources Development. Congratulations also go out to Rob Thorburn of Scenic Caves Nature Adventures for receiving the Tourism Innovation Award. Awards were presented by the Honourable Jim Bradley, at the the 6th Annual TFO Forum on March 30.

OAA Honours !

Dianne Hounsomme, who with her family owns and operates the Bayview Wildwood Resort, Severn Bridge (near Orillia), received the Ontario Accommodation Association's highest public award, the Butler Award for her dedicated contributions to Ontario's tourism industry and to OAA on March 29, 2004 at its annual convention. Congratulations Dianne! Her father, Ron Stanton, received this award in 1995 - the first father-daughter team of recipients in OAA history.

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TOURISM PARTNER NEWS

Looking Ahead To Ontario Heritage Week 2005

The theme announced by the Heritage Canada Foundation for *Heritage Week 2005* held the third week in February is "Heritage of Sacred Places and Sites". This theme offers next year's organizers a unique opportunity to celebrate Ontario's diverse heritage, Ontario's First Nations and to recognize the important work of heritage organizations and volunteers throughout the province. We will keep you posted on our Festivals and Events Listing online at www.ontariotravel.net and be sure to visit Ontario Heritage Foundation at www.heritagefdn.on.ca for more information.

Eco-North 2004 Éco-Nord

A consortium of tourism organizations, in partnership with FedNor-Industry Canada is holding Eco-North 2004 Éco-Nord, a tourism conference and trade show November 24-27, 2004 at the Valhalla Inn, in Thunder Bay, Ontario. The overall theme is Nature-based Tourism: *For You and Your Community*. The conference will have a comprehensive agenda that meets the needs of the existing tourism industry as well as prospective entrepreneurs. For more information regarding the conference, please visit www.eco-north.ca

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TOURISM REVITALIZATION UPDATE

The Tourism Revitalization Program is accepting proposals on a continuous basis. The recently revised program criteria are available at www.tourismpartners.com Please download the full criteria for further details.

Members of the Tourism Revitalization Program Office will be present at a number of the upcoming OTMPC Partnership Forums. The following is a list of forums where staff will be in attendance:

April 30	Kitchener	Four Points Sheraton Hotel
May 7	Niagara Falls	Legends on the Niagara Golf Course
May 11	Ottawa	National Arts Centre

Recent and Ongoing Projects:

Ottawa International Jazz Festival
Norwestario Travel
Historical B&Bs of Kingston
Cobourg, Ontario's Feel Good Town

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HAVE YOUR SAY !

Please direct feedback and comments about *Marketing Update* to Marie Hewak, Corporate Communications at 416-314-7566 or email marie.hewak@mtr.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@mtr.gov.on.ca If you are requesting changes to our distribution list, please provide both the old and new information.

CONSUMER RESPONSE UPDATE

March 2004: Issue N°25

HIGHLIGHTS

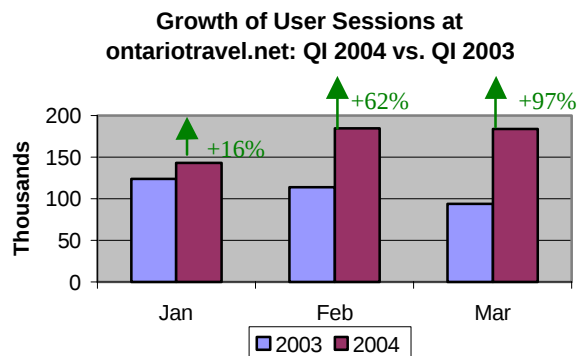
- A year ago, in March 2003 consumer response was negatively impacted by the Iraq war and the emergence of SARS. A year later, use of OTMPC's travel planning sources seem to be returning to historically seen patterns. As a result, we see some strong growth in consumer response in March 2004 as compared to the same months a year ago.
- User sessions with ontariotravel.net totalled 183,920 in March, a growth of 97% over March 2003.
- With five contests live, nearly 16,000 consumers registered with ontariotravel.net in March, the highest number of registrations in a single month since the launch of the web site!
- To the end of March 2004, 130,000 consumers have registered with ontariotravel.net. Of these, 82,700 have opted to receive e-marketing material from OTMPC.
- User sessions with tourismpartners.com increased 138% over March 2003.
- To date, a total of 5,532 partners have registered with tourismpartners.com

CONSUMER WEBSITE – www.ontariotravel.net

User Sessions

- In March 2004, 183,920 user sessions were recorded at ontariotravel.net, a growth of 97% over the same month last year.
- User sessions with ontariotravel.net were heaviest in volume on March 19 and March 8 when OTMPC's Spring Campaign was advertised on radio and in newspaper ads.
- Use of the consumer web site seems to be returning to historical patterns. Month over month increase in user sessions in the first quarter of 2004 reflects typical seasonal changes, whereas in 2003, the month over month decline was a result of the Iraq war and the emergence of SARS. As a result, significantly more user sessions were recorded in the first quarter of 2004 than in the same period of 2003.

- User sessions in the first quarter of 2004 increased by 55% over the same period last year.



Consumer Registrations

- 15,913 consumers registered with ontariotravel.net in March 2004. This was the highest registration volume in a month since the launch of the new web site in October 2002.
- The high number of registrations with the consumer web site is largely due to OTMPC's contests that ran online in March. There were 5 contests live in March 2004, as compared to only two in March 2003.

Online Contest Registrations in March 2004

Contest	Contest Date	Registrations in March
Resort	Dec 9 – March 31	3568
Spring	Feb 21 – Apr 2	3552
Adventure	Feb 18(runs to Aug. 1)	3399
Toronto Getaway	March 5-31	6000
Angling	Mar 31(runs to June 30)	44

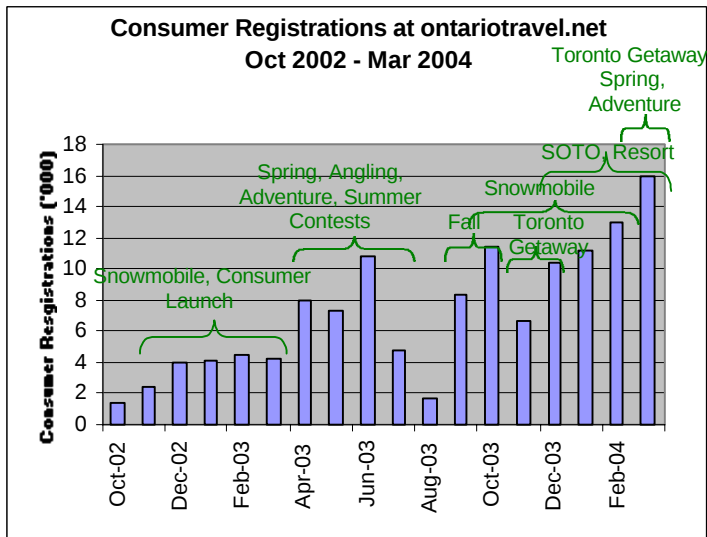
- Of the 15,913 consumers who registered with the web site in March, 9,530 (60%) opted to receive e-marketing material from OTMPC.
- The majority of consumers who registered with ontariotravel.net in March were English-speaking (98%), Canadian (80%) and female (64%).

ONTARIO
More to discover

CONSUMER RESPONSE UPDATE

March 2004: Issue N^o25

- March registrations brought the total number of consumers who opted to receive e-marketing material from OTMPC to 82,700.



PARTNERS WEBSITE - www.tourismpartners.com

User Sessions

- In March, 7,688 user sessions were recorded at tourismpartners.com, an increase of 138% over March 2003.
- The most downloaded file from tourismpartners.com was OTMPC's Marketing Plan 2004 – 2005 (2,217 downloads).

Registered Partners

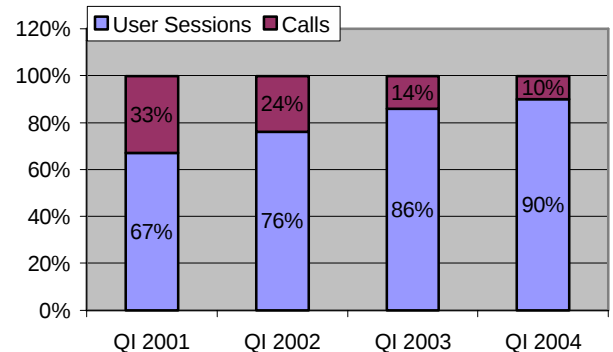
- 156 partners registered with tourismpartners.com in March 2004, bringing the total number of registered partners to 5,532.

CALL CENTRE

- Calls to the Call Centre in March 2004 totalled 21,023, a slight increase of 4% over March 2003.
- Of calls to the Call Centre in March, 84% originated from Canada, 16% came from the U.S.

- 82% of Canadian calls originated in Ontario,
- 60% of U.S. calls originated in the Border States.
- Following seasonal patterns observed in previous years, calls to the Call Centre increased in March as compared to January and February as a result of increased interest in travel planning after a long winter.
- At the same time, consumers continue to favour using the web for their travel planning. The web site continues to capture an increasingly higher percentage of consumer response than the call centre.

Calls, User Sessions as a Proportion of Consumer Response:
Q1 2001 - Q1 2004



FULFILLMENT CENTRE

- 23,681 fulfillment pieces were requested by consumers in March 2004, a similar amount as in the same month a year earlier.
- However, fulfillment distribution was lower in January and February than it was a year ago, resulting in a 9% decline in the number of pieces distributed in the first quarter of 2004 over the first quarter of 2003.
- Much of the decline came from the international markets, especially the U.S. A slower recovery in these markets and the

CONSUMER RESPONSE UPDATE

March 2004: Issue N°25

increasing fear of terrorism seems to negatively impact on consumers interest in even seeking travel information.

Decline in Fulfillment Requests First Quarter 2004 versus First Quarter 2003

Market	Decline in # of Requests	Percent Change
Domestic	1,086	-3%
U.S.	3,666	-22%
Overseas	897	-24%

- In the first quarter of 2004, 72% of fulfillment pieces were distributed in Canada, 23% in the U.S. and 5% overseas.
- Of all fulfillment pieces distributed in the first quarter, 16,485 (29%) were ordered online through ontariotravel.net, and the rest through 1-800-ONTARIO.

Top 5 Fulfillment Requests: Q1 2004

	Fulfillment Piece / Guide	Quantity Distributed
1	Ontario Road Map 2003	11,729
2	Ontario Reference Guide 2003	5,956
3	Adventure Guide 2003	6685
4	Ontario Resource Guide 2004	3710
5	Back Roads & Getaways Guide 2003	2450

ONLINE PUBLICATIONS

- Online publications became popular fast with consumers. There are almost as many online publication downloads as requests for printed publications.
- In addition to over 23,000 requests for printed publications, consumers also downloaded over 20,000 publications via ontariotravel.net. The most popular download in March was the *2004 Spring Experience Guide* (5,355 downloads).

- In the first quarter of 2004, a total of 47,649 online publications were downloaded via ontariotravel.net, an increase of 45% over the first quarter of 2003.

Top 5 Online Publications: Q1 2004

	Downloaded Files	Downloads
1	2003 Ontario Reference Guide	14,935
2	2004 Spring Experience Guide	5,355
3	2003 Snowmobile Guide	3,715
4	2004 Winter Events Guide	3,288
5	2004 Ontario Resource Guide	2,672