

Ontario Tourism Marketing Partnership MARKETING UPDATE

News ✦ Events ✦ Business Opportunities

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OFFICE OF THE PRESIDENT & CEO

We often provide information on our advertising successes and sales opportunities. In this issue, I wanted to share with you the significant value that OTMPC provides through the efforts of its Media Relations Team. For fiscal 2003-2004, the total value of media activity was **\$82.2 million**. This represents substantial results during a very difficult year.

Congratulations to our team and the many tourism operators from across Ontario whose assistance was a significant factor in our media successes!

A newly launched "out of the box" campaign is "Muskoka Golf Magic" which features golf packages and Doug Gilmore. The online contest on ontariotravel.net allows package winners to join in a golf tournament with our Hockey Heroes! In partnership with our industry colleagues, we will continue to develop innovative and aggressive marketing campaigns to motivate travel to Ontario.

As Fall approaches, we are undertaking focus group research to better understand our challenges in the U.S. border markets. The 3rd wave of travel intentions research (May/Aug. 2004) showed Americans intent to take an overnight trip during the coming 12-month period was down in May versus previous waves of tracking. The U.S. markets continue to be a challenge.

ONTARIO

More to discover

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

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OTMPC JOINT MARKETING INITIATIVES

Quebec Campaign

OTMPC launched a campaign highlighting 'Ontario' beaches including 1/2 page, four-colour ads x 6 insertions mid May in major Montreal newspapers both in English and in French. Markets are Montreal and Greater Montreal. Timing is May 29 to June 26; partnered with tourism operators to provide consumer with buyable packages. CTC is a partner in the campaign.

"The Breeze" Program – Toronto/Rochester Ferry

In partnership with the Canadian American Transportation System (CATS), "The Breeze" newspaper, radio and online campaign, promoting overnight packages to Toronto and Muskoka, commenced in June and will continue through July in the following U.S. markets: Rochester, Syracuse, Elmira, Utica, Ithaca, Binghamton and Albany.

Resorts Ontario Loonie Program

In partnership with Resorts Ontario, the "Loonie Campaign" (stay 2 nights and get the 3rd for a loonie) consists of the following activity: 25-week campaign divided into two phases Summer from May through July 18 (12 weeks) and Fall from July 19 through October (13 weeks). Summer program includes a stand alone 20-page Travel Section supplement on August 22 in the *Toronto*

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OTMPC JOINT MARKETING INITIATIVES

Sun, Free Press, Stratford Beacon Herald, Ottawa Sun, St. Thomas Times Journal and the Brockville Record. Throughout the 12 weeks, the *Toronto Sun* will include ads, contest, boxcards, weather tags and editorial.

Kingston Summer Program

Radio for 4 weeks in Toronto started May 17; 1/2 page newspaper ads - *Toronto Star* and *Toronto Sun*. Full page magazine ads - lifestyle targeted in *Toronto Life* and *Food & Drink* and entertainment focus in *Now*, niche target in *Queen's Alumni*. Timing: May to drive summer travel decisions. Other activities include interactive: micro site, e-mail blitz.

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ADVERTISING OPPORTUNITIES

NEW Fishing Micro Site

The 'new' OTMPC Fishing micro site is an integrated component of our consumer web site ontariotravel.net. Opportunities are available to purchase banner ads on the homepage and various category pages. The Fishing micro site will be supported by a marketing campaign including: a major television campaign utilizing a consortium of 4 leading angling TV programs *Fish'n Canada*, *Real Fishing*, *Going Fishing* and *Canadian Sport Fishing*, direct mail and broadcast e-mail program, e-mail and online ads, consumer shows, Ontario Angler Award Program and the World Championship Fishing event.

Banner Ads For Fall/Winter

OTMPC consumer web site ontariotravel.net is designed to inform and guide consumers to take a trip to Ontario. Consumers can search for information through experience and destination pages or by simply using the convenient search option. Some pages offer positions for banner advertising, and encourage consumers to click through to your site and discover more about your products and services. **Deadlines are August 3** to book with materials to OTMPC by August 13. Bookings are on a first-come basis. Be sure to send in your insertion order asap to avoid disappointment. Look for details on our site the week of June 28.

"FREE" Package Listing For Outdoor Micro Site - Fall / Winter

OTMPC is accepting FREE package listings from tourism businesses **until June 30, 2004** for launch of the Fall/Winter portion of the Outdoor site ontariotravel.net/outdoor. Visit the site to view examples of existing partner packages. To receive a copy of the criteria for the packages and a submission form, please contact Kendra Adema at kendra.adema@mtr.gov.on.ca. OTMPC is accepting packages for all categories on an ongoing basis.

NEW 'inOntario' Magazine - Winter Edition

Don't miss out on this exciting advertising opportunity in the Winter Edition of 'inOntario', our new travel magazine, for promoting travel in December, January and February targeting couples and families. OTMPC is offering an extension on the booking deadline. To view magazine sample layout, visit tourismpartners.com, "click" *Partnership Opportunities* ... and go to ... winterMAGAZINEinOntario2004/05opportunity.

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ADVERTISING OPPORTUNITIES

Fall and winter English/French versions of *inOntario* will be distributed through the LCBO, Union Station, through 1-800 Ontario, Ontario Travel Centres and at promotional events.

Classified Ads - 'inOntario' Winter Edition

For operators with limited budgets, classified ads are a great alternative to traditional advertising and cost **only \$250**. As a Destination Marketing Organization or Association, our *Travel Source Section* is an ideal opportunity to promote your own publication for **only \$700**.

Fall Union Station

OTMPC will distribute your brochure with our seasonal piece on August 31 to 905/416 commuters at Toronto Union Station for those seeking Fall travel vacation-planning information. Up to 175,000 people pass through Union Station corridor daily which is attached to the GO train and VIA Rail terminals including visitors from Quebec City, Montreal, Ottawa, Toronto and Windsor corridor.

Looking Ahead ... Partner Opportunities

Watch for other exciting opportunities including: Fall Micro Site, Winter Union Station Brochure Distribution, 2005 Resource Guide and *inOntario* Magazine Spring Edition.

OTMPC Sales Calendar

These and other opportunities are listed in our Partnership Opportunities Calendar at www.tourismpartners.com. Click on "Sales Calendar" under Partnership Highlights on the homepage or contact us at OTMPC Sales at otmp.sales@mtr.gov.on.ca or 1-888-365-4422 for further details.

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ONTARIO EARNS \$82.2 MILLION IN MEDIA COVERAGE !

In fiscal 2003-2004, despite SARS, OTMPC's North America Media Relations Team saw its best media coverage ever. This was attributed to the successful implementation of proactive media strategies which generated **\$58.7 million (\$43.7 million** in the U.S. and **\$15.0 million** in Canada) worth of print coverage for Ontario.

New inroads were created with internet focused magazines while relations with wire service journalists opened up major new portals of media coverage. March 2004 saw the release of the highly acclaimed *Conde Naste* advertising insert as an unprecedented investment strategy in the up-scale magazine industry. This was coordinated tightly with U.S. media relations activity.

OTMPC's Europe Media Relations Programme in fiscal 2003-2004, generated **\$11.9 million** worth of coverage for Ontario. 42 press trips were hosted by OTMPC including some noteworthy media visits out of the UK: *London Times*, *Conde Nast*, *Daily Telegraph*; and out of Germany: *Frankfurter Allgemeine*, *Geo Reisen*, *Abenteuer und Reisen*, and *DB Mobil*. These visits generated positive coverage of Ontario and promoted Ontario as a first rate tourism destination.

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ONTARIO EARNS \$82.2 MILLION IN MEDIA COVERAGE !

OTMPC also hosted two film crews: *BBC Getaways* out of Northern Ireland and *LTU* out of Germany. LTU is a major German charter airline. The film crew was sent to Ontario to collect material for an in-flight travel feature which will be shown on all LTU flights in July 2004 to an estimated 1.7 million travelers, providing exceptional coverage of Ontario as a tourism destination to consumers.

In 2003-2004, Asia Pacific Media Relations Programme generated **\$11.6 million** media coverage for Ontario. OTMPC hosted 14 press trips which saw 29 different publications write over 60 articles featuring the province. Journalist traveled from Japan, South Korea, Hong Kong, China and Australia to write about Ontario's Attractions, Food & Wine, Small Towns and special events such as the Rolling Stones SARS benefit concert.

The Asia Pacific Media Relations Team coordinated a TVB "Travelogue" television program featuring Toronto and Niagara Falls April 1-15, 2004. The cast included two popular TV stars and is expected to generate a total estimated Advertising Value (EVA) on TV of: **HK\$6,210,000 (CAD\$1,242,000)**.

Paper Sky magazine visited Toronto and will produce a story on the various cultures that call Toronto home. Ethnic restaurants will also be featured. *Paper Sky* is a bilingual magazine published in Tokyo with a circulation of 100,000. The ad rate of *Paper Sky* is close to \$10,000/page therefore the story will cover 24 pages generating a PR value of approximately \$960,000 for the article.

Sankei Living Shimbun sent two groups to experience Ontario from two distinct perspectives: Culinary and Flowers. These stories will generate positive coverage of Ontario with a total advertising value of \$20,000/page. The paper has a circulation of 243,000 and is read by consumers in metropolitan Tokyo. These stories will cover Ontario's different travel regions, enticing visitors to such destinations as Toronto, Ottawa, St. Jacobs, Niagara Falls and Niagara-on-the-Lake.

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PARTNER NEWS

The Millcroft Inn & Spa

Recently, The Millcroft Inn & Spa opened the doors to an exciting expansion of its successful spa, 'The Centre for Well Being'. The Millcroft's customary attention to detail is evident in the design of the Centre. The 9,000-square-foot Centre has 17 different treatment areas located on three floors including 11 private rooms and a café serving delicious spa fare making the Centre one of Ontario's premier spa facilities. For more information and further updates, please visit www.millcroft.com

Ontario Heritage Foundation Launches NEW Web Site

The Ontario Heritage Foundation has a redesigned web site which is easier to navigate and features online exhibits, OHF heritage properties rentals, e-Cards, and an interactive online plaque guide where you can find information about the hundreds of familiar blue and gold plaques located throughout the province. For more information, visit www.heritagefdn.on.ca

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TOURISM REVITALIZATION PROGRAM 2003-2004 RESULTS

On April 29, 2003, just hours after the World Health Organization had announced that its travel advisory on Toronto would be lifted, the Government of Ontario announced a **2-year \$128 million Tourism Recovery Program**, with the objective of rebuilding global confidence in Toronto, and Ontario as a world-class vacation destination and stimulating tourism.

The OTMPC played an integral role in making it possible for the TRP to be delivered in a timely and efficient manner. Not only did the OTMPC assume responsibility for the delivery of Tourism Revitalization (April 2004 program name changed for Tourism Recovery Program) advertising but the corporation supported the delivery of several of the various TRP components by assisting the Tourism Revitalization Office through administrative support that significantly increased the ability of the TRO to be responsive to the needs of tourism stakeholders.

The following are the **YEAR ONE** results of the Tourism Recovery Program (TRP) analysis and the impact it had on Ontario's tourism industry. PKF Consulting selected July 2003 as the initial month for incremental estimation purposes because it is the first month in which impacts of TRP funding were expected to be felt in the marketplace. Estimates cover July 2003 through March 2004, inclusive.

Key findings of the report indicated that between July 2003 and March 2004 the Tourism Recovery Program provided support for enhanced marketing campaigns for tourism events, destinations, cultural attractions and convention development activities in the province.

The following table provides a summary of the benefits attributed to the various TRP investments that had been fully completed during the July 2003 to March 2004 period for the GTA, Non-GTA and the total for the Province of Ontario.

Region	Funding \$'s Spent as of March 31, 2004	Total Recovered Spend	ROI in \$'s
GTA	\$36.2 Million	\$284.5 Million	\$7.86
Other Ontario	\$26.3 Million	\$402.1 Million	\$15.30
Total Ontario	\$62.5 Million	\$686.6 Million	\$11.00

Each dollar, which was spent on the Tourism Recovery Program from July 2003 up to March 31, 2004, generated a return of \$11.00 in tourist spending in Ontario.

The full criteria for TRP is available at www.tourismpartners.com and the office can be reached directly at 416-212-6754. For more information about Tourism and Economic Revitalization in Ontario, visit www.tourism.gov.on.ca/english/about/revitalization.htm for full program criteria and guidelines.

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HAVE YOUR SAY !

Please direct feedback and comments regarding *Marketing Update* to Marie Hewak, OTMPC 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

May 2004: Issue N^o27

HIGHLIGHTS

- In May 2004, 175,690 user sessions were recorded at ontariotravel.net, an increase of 49% over May 2003.
- 11,405 consumers registered with ontariotravel.net in May.
- To date, about 160,000 consumers have registered with ontariotravel.net. Of these, almost 100,000 opted to receive e-marketing material from OTMPC.
- User sessions with tourismpartners.com totalled 6,859 in May, an increase of 54% over the same month last year.

CONSUMER WEB SITE – www.ontariotravel.net

User Sessions

- User sessions at ontariotravel.net totalled 175,690 in May 2004, an increase of 49% over the same month last year.
- User session volume at ontariotravel.net was the heaviest on the May 11, one day after OTMPC's 2004 Summer TV advertising launched.
- The second and the third highest user session volumes were recorded on May 17 and the May 24 when the 2004 Summer contest launched and the Summer online advertising started.

Consumer Registrations

- 11,405 consumers registered with ontariotravel.net in May 2004.
- In May 2004, three OTMPC contests, the 2004 Angling contest, the 2004 Adventure contest and the 2004 Summer contest, ran online to drive consumer registrations with ontariotravel.net
- The 2004 Angling contest and the 2004 Adventure contest both ran through the whole month of May 2004. The 2004 Summer contest started on May 17.

Contest Registrations in May 2004

Contest	Timing	Registr'n in May
Adventure	Feb 18 - (runs to Aug 1)	4,447
Angling	Mar 31 - (runs to Jun 30)	2,874
Summer	May 17 - (runs to Jul 9)	818

- The majority of consumers registered in May were English speaking (95%), and female (66%).
- Canadians made 70% of all consumer registrations, Americans made 28%.
- To date, almost 100,000 consumers have opted to receive e-marketing material from OTMPC.

PARTNERS WEB SITE - www.tourismpartners.com

User Sessions

- User sessions with tourismpartners.com increased 54% in May 2004 to a total of 6,859.
- The most downloaded publication via tourismpartners.com was OTMPC's Marketing Program 2004 – 2005 (1,170 downloads).

Registered Partners

- OTMPC recently completed an industry data integration project between OTMPC and the Ministry of Tourism and Recreation (MTR). This project resulted in a merger of the two databases.

CALL CENTRE

- In May, 34,073 calls came to the Call Centre, a slight increase of 5% over May 2003.
- Of calls to the Call Centre in May, 82% originated in Canada and 18% were from the US.
 - 79% of Canadian calls were from Ontario.
 - 67% of US calls originated in the Border States.

ONTARIO
More to discover

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FULFILLMENT CENTRE

- In May, 52,021 fulfillment pieces were ordered by consumers, an increase of 7% over the same month last year.
- Of fulfillments ordered in May, 80% were ordered from Canada, 18% from the US and 2% from overseas.
- In May, OTMPC's 2004 Summer Campaign included TV, newspaper and online advertising. These marketing tactics fuelled consumers to request free guides.
- Of fulfillments ordered by consumers in May, 18,845 (30%) pieces were ordered online via ontariotravel.net.

Top 10 Fulfillment Request: May 2004

	Fulfillment Piece / Guide	Quantity Distributed
1	Ontario Road Map 2003	8,308
2	Ontario Resource Guide 2004	4,841
3	Summer Experience Guide 2004	4,781
4	Festivals & Events Summer/Fall 2004	4,571
5	Attractions Ontario Passport 2004	4,079
6	Ontario Parks Guide 2004	3,109
7	KIT: Summer Getaway Kit - CDN	2,465
8	Backroads & Getaways Guide 2004	2,312
9	Adventure Guide 2003	2,011
10	Fishing Ontario Guide 2004	1,719

ONLINE PUBLICATIONS

- In addition to requests for printed publications, 39,122 online publications were downloaded by consumers via ontariotravel.net in May 2004, an increase of 51% over the same month last year.
- The most popular online publication in May was OTMPC's 2004 Festivals & Events Ontario Guide (10,247 downloads).

Top 10 Online Publications: May 2004

	Downloaded Files	Downloads
1	2004 Festivals & Events Ontario Guide	10,247
2	2004 Resource Guide	8,280
3	2004 Summer Experience Guide	6,268
4	2004 Fishing Ontario	3,542
5	2004 Spring Experience Guide	2,913
6	2003 Adventure Guide	2,137
7	2004 Spring Experience Guide-French	1,223
8	2004 Golf Ontario Style	950
9	Wine Culinary Book	869
10	2004 Summer Experience Guide-French	741

