

Ontario Tourism Marketing Partnership MARKETING UPDATE

News ♦ Events ♦ Business Opportunities

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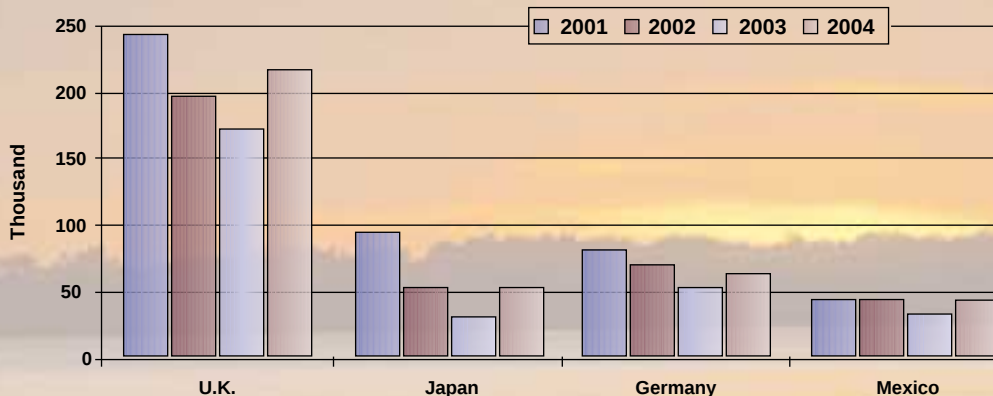
MESSAGE FROM THE PRESIDENT & CEO

Over the past two years, in spite of significant declines in overseas visits due to travel shocks, OTMPC continued to proactively make solid investments in key overseas markets through Joint Marketing Agreements (JMAs) with international tour operators to effect short and long term business.

While overall numbers are low in terms of visitation, these are extremely high yield markets for Ontario. More joint marketing agreements were undertaken with key tour operator partners in Germany (10), the United Kingdom (10) and Japan (16). These included a special Ontario only supplement distributed to travel agents in Germany, radio promotions and tube promotions in the UK and a cross promotion with tour operator/retail food chains in Japan.

We increased our presence at major trade shows and have made changes and improvements to our ability to reach these markets. Staying the course through good times and bad is reaping rewards for Ontario! Overseas markets are rebounding rapidly as the table below shows:

Overseas Entries to Ontario: Jan - July 2004



Throughout these challenging times, OTMPC's strategies and tactics have been guided by its Overseas Committee and implemented through a dedicated team of staff. OTMPC is now working in emerging markets of Mexico and China. Success in our high yield overseas markets is an important component of renewed growth for tourism in Ontario.

FALL CAMPAIGN IS UNDERWAY !

OTMPC's fall campaign includes the following in the **domestic markets**: television campaign (30second) started September 13 through to October 10. Daily newspaper (½ page 4 colour) started September 18 through to October 9. Radio (60 second) started September 13 ending October 10. Francophone newspapers (Ontario) started September 16 and ending October 20. Out of home campaigns (transit shelters/street ads) started September 13 ending October 10. Montreal daily newspaper (½ page 4 colour) starting September 30 through to October 17. Montreal radio (60 second) starting September 27 and ending October 17.

ONTARIO

More to discover

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

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FALL CAMPAIGN IS UNDERWAY !

U.S. Near Border Market (Buffalo, Rochester, Syracuse, Detroit, Cleveland) newspaper (1/4 page B&W) started on September 19 through to October 17. U.S. Radio (60 second) started September 13 ending October 10. Union Station event the week of September 13 launched the *inOntario* magazine.

Fall Micro Site ... Have A Browse!

As a function of OTMPC's interactive marketing activities, we are pleased to announce the launch of the fall micro site at <http://www.ontariotravel.net/fall>. The site is designed to reflect and extend the new *inOntario* magazine publication strategy through the online channel through links, additional content and retail packages from industry partners to add value for consumers and further inspire travel to Ontario.

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SALES OPPORTUNITIES

On the Web ...

Homepage and category banner advertising opportunities are available on the following OTMPC micro sites:

- * Fall Micro Site <http://www.ontariotravel.net/fall>
- * Fishing Micro Site <http://www.ontariotravel.net/gofish>
- * Outdoor Micro Site <http://www.ontariotravel.net/outdoor>
- * Snowmobile Micro Site <http://www.ontariotravel.net/snowmobile>
- * Winter Micro Site <http://www.ontariotravel.net/winter>

List package(s) on the Fall micro site **for only \$200**, or for **FREE** on our Fishing and Outdoor micro sites. For fishing package listings, please contact Julie Larstone, julie.larstone@mtr.gov.on.ca and for outdoor packages, contact Kendra Adema, kendra.adema@mtr.gov.on.ca. Packages for outdoor and fishing will be accepted on an ongoing basis.

On the Winter Micro Site ...

The new Winter micro site will launch in November and will promote Ontario winter activities and experiences. **Deadlines are November 8 to book and November 15 for materials.**

In our Publications ...

2005 inOntario Summer magazine is the anchor of OTMPC's summer program. Editorial highlights for this issue include: resorts, canoeing, Polar Bear Express, Great Escapes, fishing, summer theatre, theme parks, whitewater rafting and more. Opportunities vary from small units such as classified ads to double page spreads. **Deadlines are November 19 to book and for materials November 26, 2004.**

For further information about these and other OTMPC opportunities, visit the partner website at <http://www.tourismpartners.com>.

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"MUSKOKA MAGIC" RESULTS

Over 12,500 people visited the "Muskoka Magic" site. Aimed at golfers, the promotion allowed potential visitors to choose from Gold, Silver, and Bronze level packages, each of which included two rounds of golf, two nights accommodation, and tickets to a Muskoka attraction. Of the **12,500 visitors** to the site, fully **84% clicked through to get a price quote** for their Muskoka getaway.

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NORTHERN ONTARIO MARKETING UPDATE !

'Last Cull'

With OTMPC's support, the "Last Cull" is a reality fishing show that was filmed in North Bay this past summer and began airing on City TV on September 18, 2004. The 13 week series will also be shown on OLN this fall.

'GoFish' Ontario ... it's catching

Six new angling commercials will support the new "GoFish" marketing campaign that will drive viewers to the new angling website. Both the new commercials and the website are scheduled to be up and running by the end of September.

Fishing Packages

If you are an accommodation provider and offer fishing packages, please contact Julie Larstone at 705-945-6578 or at julie.larstone@mtr.gov.on.ca to ensure your free listing is posted on our new web site <http://www.ontariotravel.net/gofish>

NEW Snowmobile Resource Guide

OTMPC in partnership with the Ontario Federation of Snowmobile Clubs (OFSC) and the NOTAPs will introduce and distribute the NEW snowmobile resource guide at 10 snowmobile shows **beginning October 1, 2004**. For more information, please contact Claude Aumont in our Northern Office at 705-971-2432 and be sure to visit our new snowmobile micro site at <http://www.ontariotravel.net/snowmobile>

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CONTACT

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PARTNER NEWS

Where Have All the Tourists Gone?

Can Canada's Number One Destination Find Its Way Back?

Brian Jamieson, President, Green Tourism Association and Vice President and Director of Communications, The Edge Strategieze Inc. will moderate a panel discussion organized by the Canadian Urban Institute on **October 1, 2004** at the Holiday Inn on King, Toronto. Keynote speaker is David Pecaut, Chair of the Toronto City Summit Alliance and Toronto Tourism Recovery Alliance and panelists will include: W.R. (Bill) Allen, Deputy Minister of Tourism and Recreation; Don Eastwood, Director, Economic Strategy, York Region; Noel Buckley, President, Niagara Falls Tourism; Peter Doyle, General Manager, The Olympic Spirit and Duncan Ross, Director, Tourism Division, City of Toronto. For more information, please visit www.canurb.com/events

CONTACT

Canadian Urban Institute
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PARTNER NEWS (continued)

Emerald Necklace Trail ... CPRA 2004 Award for Excellence Congratulations Petawawa!

The Town of Petawawa's "Emerald Necklace Trail" system will now be listed among facilities such as Toronto's SkyDome and Calgary's Saddledome. On October 22, 2004, the trail will receive the Canadian Parks and Recreation Association (CPRA) prestigious award for innovation in facility design in Halifax at its annual conference. There are eight phases to the system that will eventually unite Petawawa. Campbell McKie, Director of Parks and Recreation for the Town of Petawawa explained, "...we can also gain tremendous insight into what other communities do, not only with partnerships and supplier, but when it comes to solutions for combining **walkers and bikers or ATVs along the trail.**"

Pearls: A Natural History at the ROM

Discover the fascinating natural and cultural history of pearls in a stunning display of over 600 remarkable objects at the Royal Ontario Museum (ROM) from September 28, 2004 to January 9, 2005. The exhibition traces the natural and cultural history of pearls around the world and opened at the American Museum of Natural History in New York to stellar reviews. **The ROM will be the only Canadian venue.**

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MORE INFORMATION

<http://www.rom.on.ca>

TOURISM REVITALIZATION PROGRAM

The Tourism Revitalization Office (TRO) continues to review incoming projects. Event Marketing and Destination Marketing projects have recently been approved from the following areas of the province: GTA, Niagara, Patricia Region and London.

TRP is currently scheduled to sunset on March 31, 2005. All potential applicants are encouraged to submit project proposals for upcoming winter and early spring campaigns. For additional information about the Tourism Revitalization Program, please visit <http://www.tourism.gov.on.ca/english/about/revitalization.htm> for full program criteria and guidelines or contact the TRP Office at 416-212-6754.

CONTACT

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HAVE YOUR SAY!

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

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.

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RESEARCH UPDATE

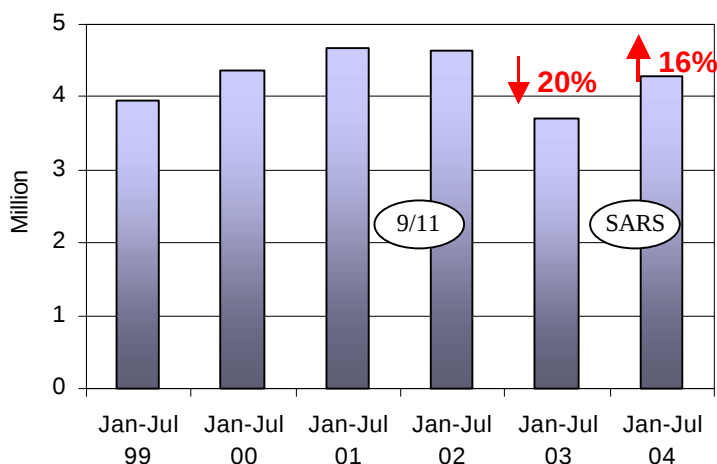
Border Crossings: July

U.S. BORDER CROSSINGS

▪ U.S. overnight entries into Ontario continued to recover faster than same day border crossings. Overnight border crossings to Ontario from the U.S. were up by 21% in July 2004 as compared to July 2003, however, remained 3% below 2002 levels.

▪ For the seven months ended July 2004, U.S. overnight entries increased by 16% over 2003.

Year-over-Year Percentage Change in U.S. Overnight Entries to Ontario



▪ U.S. same day border crossings to Ontario have been declining year-over-year since July 2001 and did continue to decline in July 2004. This translates into a loss of 1 million U.S. same day entries to Ontario, a drop of 38% over July 2001.

OVERSEAS BORDER CROSSINGS

▪ Total overseas border crossings to Ontario continued with a positive trend and increased by 41% over July 2003, marking 74 thousand more overseas trips into Ontario.

ACCOMMODATIONS

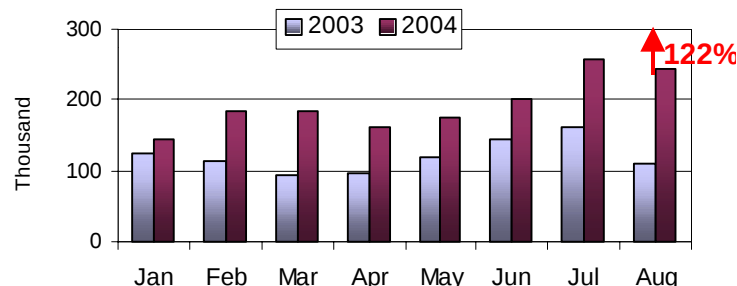
▪ In July 2004, hotel occupancy rates in Ontario increased by 9 percentage points over the same period of 2003. Nonetheless, hotel occupancy rates stayed 2% behind the pre-SARS levels achieved in July 2002.

Consumer Response: August

CONSUMER WEB SITE – www.ontariotravel.net

▪ User sessions at ontariotravel.net increased by 122% to 243,082 in August 2004. OTMPC's summer marketing activities contributed to the increase.

User Sessions at ontariotravel.net: Jan-Aug 03-04



▪ In August, 4,424 consumers registered with ontariotravel.net, an increase of 156% over August 2003. Most (62%) consumer registrations in August were generated by OTMPC's "Do Toronto" contest.

PARTNERS WEB SITE - www.tourismpartners.com

▪ User sessions at tourismpartners.com increased 94% over last August.

▪ To date (Sept 2), 9,745 industry partners have registered with tourismpartners.com, double the number we had a year ago.

▪ The recently completed database integration between OTMPC and the Ministry of Tourism and Recreation contributed to the growth.

CALL CENTRE

▪ In August, calls to the Call Centre followed the observed declining trend, dropping 12% over the same month last year.

FULFILLMENT CENTRE

▪ In August 2004, 31,371 fulfillment pieces were ordered by Canadians (73%), Americans (19%) and overseas consumers (7%).

ONLINE PUBLICATIONS

▪ Consumers downloaded over 44,000 online publications in August. The most popular online publication was the 2004 Summer/Fall Festivals and Events Guide.

Sources: Statistics Canada, PKF

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Ontario Tourism Marketing Partnership Corporation

Sources: EDS, FCB

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