

# Ontario Mix of Tourism Marketing and Promotion Research Study

## Final Report

Presented to:

**Ontario Tourism  
Competitiveness Study**

February 2009

the sixth sense of business™

---

© Queen's Printer for Ontario, 2009

Although copyright in the research papers is held by the Queen's Printer for Ontario, the papers were prepared by external companies and their conclusions do not necessarily represent the views of the Government of Ontario. The research papers were commissioned by the Ontario Ministry of Tourism for the Tourism Competitiveness Study and as such their conclusions are intended for this purpose only and shall not be relied-upon by third parties.

ISBN 978-1-4249-8932-4 (PDF)

# Table of Contents

---



At TNS, we know that being successful in today’s dynamic business environment requires more understanding, clearer direction and greater certainty than ever before. While accurate information is the foundation of our business, we focus our expertise, services and resources to give you greater insight into your customers’ behavior and needs.

Our integrated, consultative approach exploits our depth of coverage across all the research, analysis, marketing, and industry issues that will be required for this work. That is what sets TNS apart.

Thank you for allowing us to explore your business needs. The comprehensive program that follows is designed to help you achieve your goals. We hope you will trust TNS to provide the insight you need to sharpen your competitive edge.

<b>Background &amp; Objectives</b> .....	4
Introduction .....	5
<b>Data Sources and Form of Investigation</b> .....	6
<b>Executive Summary and Recommendations</b> .....	10
Profile of Ontario Tourism Marketing .....	11
Profile of OTMPC Tourism Marketing Activities.....	12
Summary of Ontario Challenges in Tourism Marketing .....	16
Suggested Strategies Going Forward .....	17
Focus of Marketing Efforts on Ontario’s Best Prospect Markets.....	19
Preconditions for Effective Tourism Marketing.....	21
Holistic Approach to Tourism Destination Marketing ..	24
Summary .....	30
<b>Analysis of “Best in Class” Tourism Business Marketing</b> .....	32
<b>Key Findings – “Best in Class” Private Sector Organizations</b> .....	39
<b>Analysis of “Best in Class” Tourism Jurisdictions</b> .....	43
<b>Appendices</b> .....	58
Appendix 1 - Glossary.....	59
Appendix 2 - Interview Questions .....	60
Appendix 3 - Summary of Stakeholder Interviews .....	61
Appendix 4 – Bibliography and References.....	66



# Introduction

---

- Ontario tourism is crucial to the economic and cultural vitality of the province as it provides opportunities for public participation, economic activity and improved quality of community life for Ontario residents.
- In 2008, the Province launched the Ontario Tourism Competitiveness Study (“Competitiveness Study”) to set a future path for revitalizing and growing tourism in Ontario.
- A key area of interest for the Competitiveness Study was to investigate successful marketing approaches in other contexts in order to scope the magnitude of potential that exists and to single out the practices that Ontario, in its battle for market share, could potentially replicate.
- This exploration was particularly important in light of the existing external challenges the global tourism industry is facing including: a slowing economy; a strong Canadian dollar; higher fuel prices; changing demographics; and the increasing number of choices in travel.
- Future growth prospects for any travel destination are now far from clear-cut. Every global travel destination including Ontario faces a multitude of possible courses of action with regard to marketing and promotion.
- This report synthesizes the results of TNS Canadian Facts’ review of “best in class” marketing and promotion practices of tourism jurisdictions and non-tourism organizations and interviews with industry experts in order to identify industry marketing trends.
- This report also provides a recommended platform for new marketing initiatives that could be actionable for Ontario tourism destination marketers in the future.



# Data Sources and Form of Investigation

---

- The following secondary data sources were explored in preparation of this Study:
  - Print and online publications;
  - The OTMPC Brand and Advertising tracking series, years 2004 to 2008; and
  - Ontario Tourism Market Assessment Research Study 2009 undertaken for the Ontario Tourism Competitiveness Study by TNS Canadian Facts.
  
- Primary survey work was undertaken with 10 selected stakeholders and industry experts to gather their insights on marketing trends, media mix options, and to integrate varied perspectives of Ontario's current standing as a travel destination in regard to its marketing and promotion practices (see: Appendix 1 for an outline of the "soft" questionnaire outline used to facilitate interview surveys and Appendix 2 for a summary of interviews with industry experts).
  - Experts were selected from a wide range of backgrounds and included representatives from industry associations, destination marketing organizations, attractions, accommodations, transportation and media. Specifically represented in this research were the following travel industry stakeholders:
    - Canadian Tourism Commission ("CTC")
    - Travel Industry Association of Canada ("TIAC")
    - Parks Canada
    - Atlantic Canada Tourism
    - Tourism BC
    - Travel Alberta
    - Fairmont
    - Via Rail
    - Metro Toronto Convention Centre
    - A travel media journalist

Note: Of the resources explored, only some touch on or examine Ontario marketing in specific terms, and, therefore, are not directly focused on the holistic goals of this exploration. As a consequence, there are necessary limitations to the depth of the exploration and the conclusions that can be drawn. There is also an obvious need to rely, to some degree, on indirect associations and inference. Certain limitations also originated from data availability, stakeholder cooperation, and the time available for completing the work.

# Data Sources and Form of Investigation (Cont'd)

---

- Analysis was conducted of 14 “best in class” jurisdictions and organizations.
- These jurisdictions/organizations were chosen under the assumption that their marketing and promotion approaches could be considered “best in class” based on one or more of the following indicators:
  - Strategic;
  - Based on Research;
  - Compelling;
  - Innovative;
  - Integrated and Coordinated;
  - Consistent;
  - Delivering on Promise; and
  - Yielding a High Return on Investment.
- To the extent possible within the time frame and the availability of relevant source materials, the “best in class” jurisdictions/organizations were analyzed for their:
  - Marketing and Advertising Expenditures;
  - Human Resources Involved;
  - Marketing Budgets of Specific Campaigns;
  - Return on Investment of Initiatives; and
  - Effectiveness of other Non-Purchased Social, Media or Public Relations (where possible).



# Data Sources and Form of Investigation (Cont'd)

---

- The 14 “best in class” jurisdictions and organizations selected for analysis:
  - Tourism Organizations – see Analysis of “Best in Class” Tourism Business Marketing for details, slides 32-38
    - WestJet
    - Fairmont
  - Non-Tourism Organizations – Recognizing that non-tourism organizations are associated with a different scale and scope of operations and different marketing budgets than those of tourism jurisdictions, a narrow focus was placed on their successful marketing practices by singling out specific campaigns and marketing approaches that could offer actionable learnings for Ontario’s marketing strategy (see Analysis of “Best in Class” Private Sector Organizations for details, slides 39-42: Tim Horton’s; Canadian Tire; Unilever – Dove; Kraft; Telus).
  - Tourism Jurisdictions - For tourism jurisdictions directly comparable to Ontario’s operations and marketing practices, the focus was kept broader. This included an analysis of effective marketing approaches and on their current standing in terms of being recognized for their marketing and branding practices (see Analysis of “Best in Class” Tourism jurisdictions for details, slides 43-57):
    - New Zealand
    - Australia
    - Ireland
    - Las Vegas
    - British Columbia
    - Alberta
    - Newfoundland and Labrador



# Profile of Ontario Tourism Marketing

---

- There are a number of organizations that are involved in marketing tourism in Ontario.
- While the Ontario Tourism Marketing Partnership and Canadian Tourism Commission are considered the two core marketers of the province, there are multiple organizations involved in marketing tourism in Ontario, including: destination marketing organizations; provincial industry associations; and private-sector marketers. This appears to have resulted in fragmented efforts, competing priorities and an overall inefficient use of marketing resources.

## **Canadian Tourism Commission (“CTC”)**

- While the CTC has significant role in marketing Ontario internationally – including most of Ontario’s overseas source markets – its marketing effort is based on emphasizing Canada as a whole - without political boundaries of the provinces and territories.
  - An example of a recent Ontario marketing effort facilitated in collaboration with the CTC was the Summer 2008 print, commuter train, and free standing insert ads in New York and Boston.

## **Destination Marketing Organizations (“DMOs”)**

- DMOs promote their particular destination with the aim of increasing visitation.
- DMOs appear to be highly differentiated in their capacity and many appear to not have embraced integrated approaches to marketing.
  - The OTMPC has participated in a number of coordinated activities with the key destination marketing organizations: in Summer 2008, the Ottawa Tourism partnered with the OTMPC to run print and subway ads in Montreal; in Fall 2008, Tourism Toronto partnered with the OTMPC (and Greater Toronto Airport Authority and Air Canada, combined for “TOGA”) to run online advertising / website in New York and Boston.

# Profile of OTMPC Tourism Marketing Activities

---

- The Ontario Tourism Marketing Partnership Corporation (“OTMPC”), the official provincial tourism marketing agency, focuses solely on marketing Ontario’s tourism products and experiences.<sup>A</sup>
- The OTMPC creates and executes integrated, research-based marketing programs that aim to grow Ontario’s tourism sector. The OTMPC also manages a tracking program to measure the impact of its advertising efforts in support of the travel industry in Ontario. The research is intended to provide consumer intelligence and feedback to assist with both directing the marketing/advertising program and measuring its effectiveness. In 2007/08, according to the OTMPC, the organization’s core budget was \$32.6 million (excluding overhead and Travel Information Centres).
- Currently, the OTMPC is actively advertising in Ontario, Montreal, the U.S Near Markets (Detroit and Cleveland) and the U.S. Middle Markets (New York City and Boston).<sup>A,B</sup>
- The OTMPC currently utilizes a variety of traditional media including television, radio, newspapers, out-of-home advertising, print and print inserts, online advertising, the Ontario travel magazine, and the Ontario travel website.<sup>C</sup>
- While the OTMPC integrates its offline and online marketing, each execution (including online advertising) is “traditional” in nature. According to our analysis, there appears to be no strategies for social or experiential marketing moving forward.

# Profile of OTMPC Tourism Marketing Activities (Cont'd)

---

- In terms of approaches employed, OTMPC marketing campaigns have taken a:
  - “Reminder” approach in targeting the Ontario domestic market by providing new ideas on what to do while travelling in their own province; and
  - “Educate” approach in targeting the U.S. Near and Middle markets and Quebec by increasing awareness and knowledge of Ontario.<sup>C</sup>
- With regard to particular campaigns, it is worth taking a look at two recent ones: TOARINO (an anagram for “ONTARIO”) and “There’s No Place Like This”.

# Profile of OTMPC Tourism Marketing Activities (Cont'd)

---

- Implemented in summer 2006 with some spill-over into the fall season, the TOARINO campaign has on certain levels, been one of the most effective campaigns undertaken in Montreal. The summer '06 Ontario ad & brand tracking results indicate that the TOARINO campaign had a compelling and relevant creative focus that helped sustain Ontario's competitive stance by arousing general interest. In addition, TOARINO was exceptional in that it successfully penetrated the French-language market (this fact speaks to the success of both the media mix and creative platform with respect to attracting the attention of Francophones).
- The campaign made an impact with respect to message communication and was well liked. Overall, it effectively leveraged a substantive investment (highest in the Montreal market to date) to achieve reach. The approach of a mystery destination combined with a surprise answer was the key element in stimulating enjoyment of this ad, a strategy that created involvement in consumers' minds. It also strongly attracted attention to the Ontario brand.
- The specific 'likes' that travellers volunteered about this advertising tended to focus on the TOARINO mystery anagram (re-ordered letters) and general arousal of curiosity. Advertising using the same creative approach was extended into the Fall '06 (TOARINO anagram on top of a 'mystery vineyards' image) with a product emphasis congruent with the season.
- This campaign's main marketing contribution was to draw attention to Ontario and begin laying the foundation for perceptual strengthening and an eventual behavioural response. Recent tracking results suggest that TOARINO may have been the starting point for this process of brand rejuvenation in Quebec. <sup>B,C</sup>

# Profile of OTMPC Tourism Marketing Activities (Cont'd)

---

- Introduced in summer 2007, the multi-faceted “There’s No Place Like This” campaign had strong breakthrough in Ontario. The campaign effectively integrated multiple media. Different media and executions were shown to have served different functions within a unified whole (television versus print, versus website, etc.) and utilized effective and cost-efficient promotional partnerships with broadcasters. The campaign generated strong diagnostic scores, strong brand attribution, and low indication of wear-out.<sup>C</sup>
- Rejuvenated, the campaign is still in the market, and, to date, the “There’s No Place Like This” platform continues to exhibit little wear-out and low fatigue levels, suggesting that the production investment can be continually deployed over multiple flights on a seasonal basis, thereby enhancing efficiency. <sup>C</sup>
- Moreover, in November 2008, the campaign was recognized as a “Marketing Campaign of the Year” (National Award for Tourism Excellence hosted by the Tourism Industry Association of Canada) for its “leadership in innovation”. Integration across media under the umbrella of a common creative theme remains highly effective and consistent reinforcement of the same strong underlying message season after season is essential to brand building. <sup>1</sup>

# Summary of Ontario Challenges in Tourism Marketing

---

- One of the current challenges faced by all of Ontario's tourism marketers is to establish effective means of fully embracing non-traditional and emerging marketing approaches.
- While the OTMPC integrates its offline and online marketing, each execution (including online advertising) is "traditional" in nature. According to our analysis of the OTMPC Marketing Plan for 2008/2009, there appears to be no strategies for social or experiential marketing moving forward.
- According to our analysis, Ontario's tourism marketing campaigns should tap more into the themes of "Canadian-ness": friendliness or sense of community. Effective marketing approaches implemented by other tourism destinations have been able to blend a sense of openness and a welcoming attitude with an aura of distinctiveness or difference. This stimulates curiosity and true travel interest in the absence of perceived risk. The probability of converting interest to behaviour is substantively improved as a result. Moreover, it should be noted that, while this approach is likely to resonate within all origin markets, evidence has shown that it may be particularly relevant to Americans (still Ontario's primary source of inbound tourism revenue).
- Across Ontario, marketing efforts should better optimize the targeting of diverse, ethnic communities within the domestic market. Efforts in this area might not be considered critical, but it should be noted that some of Ontario's diverse, ethnic communities are quite large. It can be argued that these communities have the capacity to stimulate tourism activity in two ways – by exploring Ontario themselves and by acting as hosts to family visiting from their home country. As the middle class in countries such as China and India emerges, the demand for tourism will grow, and family/friends in Ontario can help encourage travel to the province beyond strictly visiting friends and relatives ("VFR").



# Suggested Strategies Going Forward

---

- Recommending specific strategies for marketing of Ontario tourism product and experiences is not a straightforward task, especially in light of the economic downturn and related changes in consumer behaviour.
- Nevertheless, TNS Canadian Facts' research was undertaken with a goal to draw on key marketing trends in Canada and beyond to make actionable recommendations for Ontario tourism destination marketers going forward. Therefore, in an ideal environment of limited budgetary and creative constraints and advantageous privacy, technology, and advertising laws in years 2010 or/and beyond, it is recommended that the Ontario's tourism marketers consider the following "best-in-class" marketing practices to promote Ontario's tourism product and experiences to Ontario's "best prospect" source markets.
- In order to stay competitive, it is recommended that Ontario's tourism marketers learn from the practices of leading marketing organizations and embrace a holistic approach to tourism marketing by integrating traditional and non-traditional techniques to advertising, promotion, and branding by:
  - Reaching customers as effectively as possible with a compelling message that is reinforced across multi-media;
  - Adopting consumer-centric marketing focus; and
  - Facilitating interactive engagements ("two-way dialogue") with customers and enhancing the emotional connection that would allow for greater sophistication in the area of Customer Relationship Management ("CRM").

# Suggested Strategies Going Forward (Cont'd)

---

- Ultimately, Ontario's tourism marketers must assign some degree of priority to non-traditional marketing. The media reconfiguration process may require increased budgets initially during the development and experimentation phases, but eventually efficiencies will be realized, and return on investment is likely to improve.
- According to our research, "best in class" marketers show their traditional/non-traditional marketing ratios ranging from 80/20 to 40/60 with a presumed "ideal" of 50/50. This is consistent with future advertising spending projections prepared by TNS Media Intelligence among others that show online communications achieving the share status of mainstream media such as newspaper within a few short years. There will also likely be a reconfiguration of media roles. Television revenues will continue to grow but may become more targeted (through selected use of cable channels), whereas use of print will become more tightly focused and give way to online media in some respects.

# Focus of Marketing Efforts on Ontario's Best Prospect Markets

---

- There is numerous data supporting a proposition that Ontario's primary marketing focus (and the related investments) should continue to be kept on the domestic Ontario market, with secondary focus on the U.S. Near and select Middle Markets, and tertiary focus on the Quebec source market. In addition, it could be argued that some marketing investment in the three Western provinces is also warranted as a means of establishing a solid foundation for future growth across Canada. Overseas efforts should involve greater coordination with the CTC in terms of messages, products, etc., that are relevant to Ontario and are consistent with the OTMPC's strategic direction.
- Clearly, a rigorous effort over an extended period of time is required to encourage and generate significant and sustained volume growth. Changing perceptions of Ontario would be required especially in Quebec and in the Western Canadian markets. This would require a strong commitment and considerable investment over an extended period of time. The same is true in Near US markets, where awareness and image-building of Ontario needs to be strengthened.
- A separate Ontario Tourism Market Assessment Research Study, 2009 identified the following markets as the "best prospect" markets for Ontario: (not in priority order)
  - Domestic Ontario market
  - Quebec (e.g., Montreal)
  - Rest of Canada (e.g., the three Western provinces)
  - U.S. Tier One / Near Markets (e.g., Detroit/Southeast Michigan; Northern Ohio, Western New York)
  - U.S. Tier Three / Middle Markets (e.g., New York City, Chicago)
  - Overseas (e.g., United Kingdom, China, Mexico, India)

# Focus of Marketing Efforts on Ontario's Best Prospect Markets (Cont'd)

---

- It is very important to recognize that Ontario's "best prospect" markets have been selected based on their potential in terms of generating visitors to the province and/or potential to collect a substantial amount of expenditures from these visitors. While several emerging markets also warrant attention they would require a different type of long-term strategy focusing on building awareness.
- These "best prospect" markets have not been assessed for: receptivity of any particular marketing practices (including those that originated from the "best in class" analysis contained in this report); availability of technology/tools to support particular marketing tactics (e.g., hand-held mobile device advertising); or laws, regulations or policies that could prohibit certain marketing practices (e.g., online behavioural targeting).
- An assessment of receptivity of a "best prospect" markets' to various marketing approaches would need to be undertaken.

# Preconditions for Effective Tourism Marketing

---

Based on a review of “best-in class” practices of leading marketing organizations, it is recommended that Ontario’s tourism marketers meet the following preconditions:

## 1. Sufficient and Sustainable Marketing Budgets for Tourism Destination Marketers

- Sufficient and sustainable marketing budgets foster creativity and innovation and allow for marketing activities to have breakthrough impact over the long-term.
- Increased investment and communications efforts during any season can help develop a brand profile in strategically desirable ways - ensuring that consumers feel positive about the brand and helping to establish better conditions for sustained brand growth over the long term.
- According to our research, in every “best prospect” market there may be a ceiling (perhaps a soft one) to Ontario’s marketing reach and effect. While larger investment into marketing campaigns may foster somewhat higher levels of recall, it may have limited impact in the long-term. Marketing impact can be achieved only with increasingly more substantial effort and investment. This suggests that the best strategy would be to build investment incrementally over time at each stage in the brand development process or renewal. This is particularly relevant to markets in Quebec, the U.S. Middle markets and the U.K.
- You cannot achieve an immediate return on investment since each incremental gain in impact can be achieved only with increasingly more effort and investment.

# Preconditions for Effective Tourism Marketing (Cont'd)

---

## 2. Industry Cooperation

- Increased cooperation with the Canadian Tourism Commission and destination marketing organizations is required particularly given the current global context. Ideally collaboration would create greater efficiencies of marketing resources, clearer marketing roles and responsibilities and a consistent Ontario brand.
- Industry partnerships would also help to establish opportunities to cross-promote and bundle tourism-related products (e.g., accommodations, retail, dining, etc.).

## 3. Tourism Product and Experiences Deliver on Marketing Promises

- Marketing can only be successful if the product delivers on its promise. Ontario's marketing promise must be clear and realistic. As the Canadian Tourism Commission puts it: "a tourism product is something that travellers buy, but a tourism experience is something that travellers remember".
- Our research revealed that successful destination marketers focused on creating a positive consumer experience ("from home back to home") rather than focusing on the tourism offering alone. This requires an assessment of supporting tourism infrastructure including transportation links and accommodations to ensure that they meet a traveler's expectations.
- It is important to establish reasonable expectations of tourism growth so that tourism products and supporting infrastructure can handle increased tourism volume and are sustainable over the long-term.

# Preconditions for Effective Tourism Marketing (Cont'd)

---

## 4. A Sustainable Industry Vision

- Consumers are becoming increasingly concerned about the environmental and community impacts of travel.
- Ontario has a reputation as a “nature and the outdoors” destination. Tourism marketers could consider building on this reputation by positioning their regions as environmental stewards and leaders in responsible tourism. This would be an appealing feature for Ontario particularly when compared to US Near/Middle Markets by potential tourists.

### Note on Interpreting Return on Investment:

- Determining the return on investment of specific elements of marketing campaigns is challenging. It is even more challenging to calculate the return on non-traditional marketing techniques (e.g., word-of-mouth, blogging, social and media “buzz”).
- Measuring the return of investment (ROI) of a non-traditional marketing technique should be based on its marketing goal: What do we want users/participants of non-traditional marketing initiatives (e.g., virals, blogs, Facebook pages, or Google Earth layers) to do? Are they doing that in a way that accomplishes our goals (e.g., generating certain level of website traffic, word of mouth, blog hype)? Since non-traditional marketing focuses on indirect conversion (“cultural currency”), the ROI could be measured on what it would have cost if traditional advertising was used to reach the same goal. For example: time watching a TV spot versus time spent going through a virtual tour of a destination on its website or watching a destination’s promotional virals on YouTube.

# Holistic Approach to Tourism Destination Marketing

---

It is recommended that Ontario tourism destination marketers use a holistic approach to marketing that includes:

- ✓ **Research to Understand “the Language” of its Potential Tourists:**
  - Leading marketing campaigns are developed based on target market research to determine media and communications preferences and receptivity to various messages and emotive context. This helps to optimize the marketing mix but also provides input into the development of creative ideas. For instance, Las Vegas and Western Australia (see analysis on slides 51 and 48) used qualitative research to uncover the needs and motivations of potential tourists.
  - Our analysis identified that the theme of: “Canadian-ness” - friendliness, sense of community and hockey – appears to work well in the marketing other Canadian jurisdictions.
  - Given the ethnic diversity of Canada’s population, Ontario should increase its targeting of ethnic and diverse markets by fine-tuning marketing efforts.



# Holistic Approach to Tourism Destination Marketing (Cont'd)

---

- ✓ **Ensure the Ontario Brand is Tapping into All Possible Touch Points including Customer Service:**
  - Our research found that leading marketing organizations recognize that customers respond to a consistent brand and message and that they experience a brand in a number of ways: through the actual product, price, marketing, sales or consumer relations personnel, etc. While each touch point has an impact on customers' experiences, all "brand touch points" help to build a brand's image and reputation.
  - Consumers' experiences in researching and booking a trip and their dealings with tourism staff act as superb Ontario brand touch points.
  - Across the tourism industry, service improvements need to be prioritized as a way of strengthening Ontario's overall brand. For example, contacts with staff of Ontario Travel Information Centres, Ontario's 1-800 number and ontariotravel.net, tourism attractions, accommodations, restaurants, etc.

# Holistic Approach to Tourism Destination Marketing (Cont'd)

---

- ✓ **Interactive Engagement that Facilitates Two-Way Dialogue with a Consumer:**
  - A holistic approach to marketing includes the utilization of interactive technologies to bolster two-way communication with consumers. This helps to create a sense of real dialogue.
  - Ontario's tourism marketers should embrace interactive technologies and techniques to build one-to-one relationships. These include:
    - Dynamic websites that allow consumers to:
      - Post travel stories, blogs and videos;
      - Experience virtual tours or develop interactive personal tours by navigating different routes of interest in a destination through videos “webisodes” (a great example of such destination website is the recently introduced “Montreal en 12 lieux”, featuring documentary style video footage – “digital picture of a destination”.); and
      - Obtain information about a destination such as statistics, historical and facts.
    - Technologies that create a profile of a destination in new consumer spaces help to generate positive word-of-mouth in online communities such as Facebook site, virals on YouTube and Google Earth layer.
  - It is also essential that customers are able to provide feedback throughout their experience in researching, booking and visiting a destination.

# Holistic Approach to Tourism Destination Marketing (Cont'd)

---

## ✓ Marketing Activities that Enhance a Consumer's Emotional Connection with a Product:

- Activities that allow travellers to “connect” to meaningful experiences based on their individual preferences and expectations (behavioural targeting) have been successful in leading jurisdictions.
- A few suggestions include the use of:
  - Storytelling – as a tool to encourage consumers to contribute in marketing Ontario (rather than simply “receiving” it). Storytelling allows consumers to “invest” in a brand. Consumers remember stories better than any other form of marketing. Storytelling could be encouraged through the facilitation of contests where a winner could be employed as a spokesperson for a the brand. This is particularly effective in generating blog hype, media/social buzz and public relations exposure.
  - Spokespersons in key origin markets that are popular and respected – as a tool to tighten consumers' emotional bonds and personal connections to a brand.

# Holistic Approach to Tourism Destination Marketing (Cont'd)

---

- ✓ **New Media and Interactive Marketing/Creative Approaches to Build on Traditional Marketing Approaches:**
  - Ontario tourism marketers should supplement traditional media and mass marketing with new media and novel marketing/creative approaches. Some degree of priority should be assigned to non-traditional marketing. The media reconfiguration process may require increased budgets during the development and experimentation phases but eventually efficiencies would be realized and ROI would likely improve.
  - The majority of the “best in class” case studies and stakeholder interviews revealed that successful marketers are open to increasing investment in online and non-traditional marketing approaches. Our research found that in some cases, social and media buzz outweighed the impact of and the return on paid media.
  - Increased two-way communication with customers would help to strengthen Ontario’s brand.
  - Non-traditional approaches evolve rapidly from online advertising to individualized, interactive forms of communication with consumers. Often these approaches act as a marketing “hub” with offline components of a campaign built around/directed from the digital component. For instance, Tim Horton’s broadcast and print advertising is built upon its “Every Cup” storytelling website.
  - The trend is to be “out there”, interacting and connecting with customers, moving beyond a passive viewing/listening experience that traditional media offers. New technologies now play a central role in marketing.

# Holistic Approach to Tourism Destination Marketing (Cont'd)

---

- ✓ **New Media and Interactive Marketing/Creative Approaches to Build on Traditional Marketing Approaches: (cont'd)**
  - Integration of offline and online (or traditional and non-traditional) marketing approaches build the strongest holistic marketing platform. Traditional or offline media cannot be ignored.
  - According to our research, “best in class” marketers show their traditional/non-traditional marketing ratios ranging from 80/20 to 40/60 with a presumed “ideal” of 50/50. This is consistent with future advertising spending projections prepared by TNS Media Intelligence among others that show online communications achieving the share status of mainstream media such as newspaper within a few short years.
  - There will also likely be a reconfiguration of media roles. Television revenues will continue to grow but may become more targeted (through selected use of cable channels), whereas use of print will become more tightly focused and give way to online media.
  - It is recommended that Ontario tourism destination marketers:
    - More aggressively seek opportunities to utilize non-traditional marketing techniques/tools; and
    - Enter into a thorough investigation and planning phase before committing significant dollars to a radically altered media and communications plan.

# Summary

---

- ✓ **Successful marketing tactics that Ontario tourism marketers could employ in the short-term are:**
  - Initiate and embrace non-traditional and digital marketing.
  - Build on Ontario's past successes by rejuvenating well-known and appealing campaigns to maintain their popularity. Offering an original take on an existing tourism product can be perceived as a new and exciting offer. Specifically, Ontario could build on OTMPC's TOARINO success by re-introducing the campaign in markets that have not been exposed to the campaign but where awareness of Ontario is sufficient (e.g., US Near Markets or Western Canada).
  - Take it a step further by bringing the theme of "Canadian-ness" (or "Ontario-ness") into marketing. Sponsor and advertise in hockey halls/rinks/games or engage consumers at local community events. These visuals could be used as the basis for creative.
  - Based on the WestJet example (see analysis on slides 33-34), happy employees used as spokespeople can deliver a high power of persuasion. To the same effect, the use of "real" Ontarians and staff of Travel Information Centres (TICs) in Ontario tourism ads could tap into the province's culture (related to "Canadian-ness" of Tim Horton's/Canadian Tire, see slides 40-42) but also raise the profile of TICs – an important brand touch point.
  - Based on Fairmont's example (see analysis on slides 35-38), enhance the freshness and credibility of destination websites by date-stamping images and videos. Based on Fairmont's example, re-work websites to give consumers more experiential product (rather than a brochure online). Also explore the possibility of introducing unique rich media ads to suit the online environment.
  - Based on New Zealand's experience (see analysis on slides 44-46), create an Ontario Tourism Google Earth layer. This program, used by 400 million people worldwide<sup>2</sup>, allows for the interactive navigation of places of interest, virtual exploration of places, and planning of actual trip itineraries. This could be a particularly beneficial marketing tool in targetting emerging international markets.

# Summary (cont'd)

---

✓ **Other Considerations:**

- Emotional connections with a brand trigger imagination and cultivate interest. As seen in Las Vegas (see analysis on slide 51), emphasizing consumers' connections with a brand can produce better results than simply emphasizing consumers' connections with a brand's products.
- Before taking large risks with costly, provocative creative aimed at Ontario's "best prospect" markets, it is important to assess the culture, traditions and customs of these markets while pre-testing the creative.





# WestJet

## Profile:

- According to WestJet's annual report, in 2007, WestJet revenue was \$2.1 billion, a 22% increase from 2006 or a 55% increase from 2005. <sup>3</sup> The company attributes this "record-breaking" profit to its passion, commitment to superior traveller satisfaction and its human resources.<sup>4</sup>
- The company's marketing expenses (in 2007 totalled \$187,929K) include advertising and promotion costs, travel agency commissions, corporate incentive programs, Air Miles® Reward Miles, and live satellite television licensing fees. <sup>3</sup>

- **"Employees are not just employees. They are owners" Marketing Campaign** – was launched in 2005 to differentiate WestJet from its major competitor and to change perceptions that WestJet was a discount airline:
  - The campaign was developed based on market research that identified that the sustainable point of difference between WestJet and its major competitor was the people-driven corporate culture of WestJet and its willingness to work in a friendly, stress-free and enjoyable environment (80% of WestJet employees are shareholders. The company also recognized that the promise of a better customer experience was a core marketing message that would help to cut through clutter and provide sufficient differentiation. <sup>5</sup>
  - The campaign's core message was that: employees were "WestJetters" and "a family," and their way of communicating with customers was "WestJetiquette." The campaign's marketing mix included TV, radio, print, and out-of-home promotions, and the ads were kept quirky and humorous. <sup>6</sup>

## Key Learnings:

- ✓ **A natural marketing angle can be found in a company's culture and/or within its competitive environment.**
- ✓ **Happy employees used as spokespeople in a campaign can deliver a high power of persuasion.**
- ✓ **It is critical to deliver on a promise, particularly in a service-oriented business.**

# WestJet (cont'd)

## ■ “Employees are not just employees. They are owners” Marketing Campaign (cont'd)

- As a result of the campaign: WestJet’s top-of-mind awareness increased by 10% (to 86%) and unaided recall of TV ads by 34% (to 59%) in 2005. Brand perceptions related to travel experience improved significantly particularly as WestJet was seen as going “above and beyond to provide positive travel experiences” (68% from 48% prior to the campaign).<sup>6</sup> This suggests a strong on-the-ground effort to deliver on the advertising message with employee engagement as the central theme.
- In terms of financial return, 16% of bookings registered following the campaign were from people who had not flown with WestJet before. According to its brand health study in 2006, WestJet’s total share of Canadian flying travellers increased from 51% to 60%.<sup>6</sup>
- The initial ROI of the campaign was 35%.<sup>5</sup> This was calculated on a basis of recalling the campaign/booking a flight and represented 770,000 incremental bookings as the result of the campaign (with an average booking of \$300), with an assumption that 50% of new bookings were attributable directly to the campaign. WestJet’s incremental revenue was \$115M.<sup>6</sup>
- **Behavioural Targeting** - Another means by which WestJet optimizes its marketing is through a partnership with AOL that tracks Internet cookies and pixels of people who have previously visited the WestJet website. Once a person visits WestJet’s website, WestJet online ads “follow” other sites the person visits. This form of behavioural targeting largely eliminates the need for guesswork with regard to online media buy and subsequently yields significantly lower hit-and-miss results.<sup>7</sup>

## Key Learnings:

- ✓ A single successful campaign can significantly raise awareness of a company’s brand, brand imagery and advertising recall scores in a very short time. It can also generate unprecedented ROI and incremental revenue.
- ✓ Online behavioural targeting is a new marketing technique that can be used to eliminate the guesswork in the online media buy.

# Fairmont Hotels and Resorts

---

## *Profile:*

- Fairmont Hotels and Resorts is known as brand synonymous with a luxury lifestyle. What distinguishes Fairmont from other luxury brands is the company's focus on corporate social responsibility ("CSR") and consumer relationship management. As part of its commitment to CSR, Fairmont has branded itself as a leader in the areas of environmental stewardship and responsible tourism, and prides itself for being involved in the communities where its properties are located.<sup>8</sup> Fairmont's community initiatives include urban revitalization projects (for instance, a project with the City of Toronto<sup>9</sup>), conservation of cultural and historical properties and even promoting composting to its hotel guests.<sup>10</sup>
- Marketing efforts are concentrated on its loyalty programs' members and technology-enabled customer relationship management.<sup>8</sup>
- Fairmont's annual marketing budget is calculated on the basis of sales, and represents an average of 6% of sales (Note: exact amounts are not publicly disclosed).<sup>11</sup>

# Fairmont Hotels and Resorts (Cont'd)

---

- **Experiential Website** - Its website is one of Fairmont's best marketing mix tools. According to the company's marketing staff, the "experiential" (as opposite to "brochure-like") site is intended to communicate hotel experiences, build relationships with guests, build trade recognition, as well as represent the Fairmont brand across all online channels.<sup>12,13</sup>
  - The site features "always fresh" date-stamped content, high definition videos, a variety of quality still images, 360-degree property tours and interactive destination and property maps.
  - The site is currently available in English, Japanese, both Latin American and European Spanish, French and German. The site also allows for personalized transaction-based booking capabilities that feature the Fairmont Planner, booking of activities such as tee times, and provides access to a Virtual Consierge.<sup>12</sup>
  - Since introduction of its experiential website in late 2002, Fairmont saw online bookings increase by more than 50% (2002 to 2003), with substantial growth expected during the next few years.<sup>12</sup>
  - The company's trade micro-site features a large library of promotional and property-related photos. It includes an easily-searchable, dynamic collection that has allowed Fairmont to reduce its level of marketing human resources capacity.<sup>12</sup>

## Key Learnings:

- ✓ **Corporate social responsibility (CSR) that emphasizes a brand's involvement in the community of operations can be used not only as a secondary differentiating attribute in building brand image, but as a basis for building a successful advertising campaign by connecting with consumers on meaningful ground.**

# Fairmont Hotels and Resorts (Cont'd)

- **Balance of Online/Offline Marketing** - While Fairmont tends to assign higher priority to online marketing (relative to offline marketing), it strives for a “healthy balance” between the two (current estimate is 60% online / 40% offline<sup>14</sup>):
  - A variety of media is employed: online, print, radio, partner marketing, email and direct marketing, as well as consumer-generated promotion. Its goal is to deliver optimally in terms of brand awareness, sales and loyalty in creating a fully integrated campaign with a variety of consumer touchpoints.<sup>15</sup>
- **Consumer Database** - Fairmont also invests in managing its consumer database, a tool used to track the “lifecycle” of their consumers and analyze their “guest value.” This allows for subsequent segmentation with a view to drive future behaviour and additional revenue.<sup>16</sup>
  - As a result of the detailed segmentation, Fairmont is able to run targeted marketing campaigns tailored to the preferences of its unique market segments (for instance, at the start of golf season to customers who had previously visited golf courses), but is also able to maximize revenues by focusing marketing and brand-building efforts on higher-value customer groups and pursue cross-selling and up-selling opportunities to the targeted audience.<sup>16,17</sup>
  - Data shows that customer segmentation practices allow for a better understanding of customer media preferences. As a result, the effectiveness of Fairmont’s direct marketing increased by 300% (increase in the response from 0.5% to almost 2%).<sup>18</sup>

## Key Learnings:

- ✓ A company’s website can be used to build a brand.
- ✓ Date-stamping visuals and videos keeps a website “fresh” and reliable.
- ✓ Customer relationship management and keeping a complete and up-to-date customer history database enables effective segmentation and targeting. In particular, it helps to target marketing to specific “high-value” customer groups.

# Fairmont Hotels and Resorts (Cont'd)

---

- **Cross-Promotion** - Fairmont has set up successful cross-promotion partnerships including a marketing alliance with Lexus. In summer 2008, the two luxury brands teamed up to offer Fairmont loyalty program members with Lexus hotel courtesy cars and “eco-conscious” Lexus Hybrid Living Suites. This partnership helped positioned both companies as distinctive targeted brands that support environmental sustainability. It enabled both brands to enhance and extend the luxury experience for their customers at a more general level beyond their own product.<sup>19,20</sup>
- **“Advantage” Advertising Campaign** - While top-of-mind brand awareness for Fairmont among Canadians is high, a key challenge is encouraging travelers to act on this cognizance more often. In response, Fairmont launched province-specific “Advantage” advertising campaigns in Alberta, Saskatchewan, Manitoba and Ontario. Its strategy was to evoke a sense of pride in one’s province and heritage by emphasizing Fairmont’s long-standing presence in communities through messaging: “Fairmont hotels were their hotels.” The media mix consisted of print and online ads as well as support in Alberta (Travel Alberta) and generated an ROI of 7 to 172.<sup>21</sup>

## Key Learnings:

- ✓ **Cross-promotion with another seemingly unrelated brand/product from the same consumption category (e.g., luxury) can positively affect both brands.**



# Values, Community and Emotional Connections

---

- ✓ Tim Horton's plays on deep-seeded values and emotive touch points to help to build a strong brand (in this case, "Canadian-ness": friendliness, sense of community and hockey).<sup>22-26</sup>
- ✓ Canadian Tire's marketing focus on the theme of "Canadian-ness" works to build a strong brand in the Canadian market.<sup>27-31</sup>
- ✓ Kraft created the "Hockeyville" image program as a source of Canadian identity (hockey) – media mix works extremely well in the Canadian market.<sup>32,33</sup>
- ✓ Telus has used animals in advertising (e.g. The Future is Friendly Brand) that is simple and emphasizes the authenticity of a message. It also attracts multiple demographics including children. The use of spokespeople/visuals (e.g., children, couples, happy customers, well-known local community representatives) can also be effective in establishing emotional connections.<sup>34-38</sup>
- ✓ Tim Horton's "Every Cup Tells a Story" is an example of two-way communication with customers that helps strengthen intimacy with a brand and reinforces the perception that a company is part of the community.<sup>39</sup>



# Effective Use of Various Media

---

- ✓ Social and media buzz can outweigh the impact of and the return on paid media as demonstrated by Unilever – Dove's "Campaign for Real Beauty" <sup>40-42</sup>
- ✓ Kraft Foods has been effective in targeting consumers through the use of innovative new media and integrating campaigns across various media (e.g. Kraft mobile telephone campaign and Diamond Shreddies cereal campaign). <sup>43-47</sup>
- ✓ Canadian Tire has demonstrated that incorporation of online advertising into the media mix can be effective, and the two-way synergies can be established with other media when they are connected by a common theme. <sup>27,28,48</sup>
- ✓ Synergy effects can be created by both deploying the same message over several flights of advertising and by using different advertising media to cycle the message through multiple consumer touch points as demonstrated by Canadian Tire including use of music/jingles, in-store and television. <sup>29-31,49</sup>

# Coherence and Synergy

---

- ✓ Kraft Foods, through understanding of consumers and a commitment to stay true to the brand, demonstrates an over-arching umbrella position and vision that provides coherence, aids consumers understanding of a brand and delivers powerful synergy across all product lines. <sup>32,43,50-51</sup>
- ✓ Continuous use of a certain “face” of a campaign pays off in terms of building brand awareness and ensuring an immediate connection with a brand’s overall persona as is used by Telus in animal-themed advertising. <sup>34,36</sup>
- ✓ The Koodo Marketing Brand (Telus) demonstrates that streamlining elements of branding and advertising in a conceptually similar manner can maximize integration and marketing impact. <sup>52,53</sup>



# New Zealand

---

## **Profile:**

- Tourism New Zealand is the national organization tasked with promoting New Zealand as a tourism destination both domestically and internationally (affiliated but not part of the New Zealand Ministry of Tourism).
- Its marketing budget was NZ\$69 million in 2006/07 (\$1CDN=~0.80NZ\$ during this time period).<sup>54</sup>

- **"100% Pure New Zealand" / "the Youngest Country" campaigns** – The original "100% Pure New Zealand" campaign was created in 1999. Now in its 9th year, its recent iteration "The Youngest Country" campaign, is used throughout all Tourism New Zealand marketing activity.
  - The brand has been energized by this new positioning and won the top prize in the "Marketing-Primary Government Destination" category of the Pacific Asia Travel Association Gold Awards. The campaign was chosen out of 258 entries from 108 different travel and tourism organizations from across the Asia-Pacific region.<sup>55</sup>
  - The campaign displayed compelling awareness numbers with international travellers. Fifty-one percent of total interactive travellers surveyed in Australia were aware of New Zealand's advertising, compared with 23% of travellers from the USA and 30% of travellers in the UK.<sup>54</sup>
  - High awareness of the brand was also found in an Unlimited magazine poll that showed that "100% Pure New Zealand" was the second-most recognizable brand in New Zealand (after the All Blacks, New Zealand's National Rugby Team). In a brand audit conducted by Interbrand (for the years between 2001-2004), it was calculated that investment in Australia of NZ\$18 million earned \$467 million (ROI of 26:1); NZ\$20 million investment in the UK earned NZ\$224 million (ROI of 11:1); and a NZ\$21 million investment in the US earned NZ\$309 million (ROI of 16:1).<sup>54</sup>

## **Key Learnings:**

- ✓ **Reinvigorating a well-known and appealing campaign can keep it popular for a longer period of time.**

# New Zealand (Cont'd)

- **“What do you say UK?” campaign** - In 2008, Tourism New Zealand launched its largest campaign in the UK valued at NZ\$7.3 million. The campaign was developed based on research that found that the British market was most likely to make travel decisions after talking to others. The campaign consisted of eight 40 second TV commercials, as well as online promotions featuring British travellers in New Zealand talking about their holiday <sup>52</sup> (Note: worth noting is the publicity the country received in the UK after the Lord of the Rings trilogy - 10% increase in traveller volume every year from 1998 to 2003). <sup>55</sup>
- **“Pure New Zealand” YouTube page / “Tourism Layer” on Google Earth** – Placed a greater focus on directly targeting consumers via the internet, mobile phones, social sites, blogs, podcasts and other emerging technologies. Two innovative examples: Tourism New Zealand’s official “Pure New Zealand” YouTube page; and a collaboration with Google where New Zealand became the first country to produce an in-depth “tourism layer” on the Google Earth application. This layer contains enhanced information on visitor centers, points of interest and scenic highlights. In 2006, Tourism New Zealand won its second “Webby” award for best tourism website (Note: Japan, South Africa and Nova Scotia have since created their own layers to Google Earth). <sup>56</sup>

## Key Learnings:

- ✓ **Research “best prospect” target markets to learn about their media and communication preferences. Not only can this help in optimizing the marketing mix, it can also present a strong basis for a creative idea.**
- ✓ **Online technologies provide for two-way communication with consumers and help to create a sense of real dialogue.**
- ✓ **The presence of a destination on Google Earth is not only innovative and interactive, but offers potential exposure to 400 million people (current number of users who have downloaded the program).**

# New Zealand (Cont'd)

---

- **Innovative Press Events** – New Zealand strongly supports holding innovative press events to build brand awareness. For example, it set up a giant inflatable rugby ball emblazoned with the 100% Pure New Zealand logo under the Eiffel Tower in France during the 2007 Rugby World Cup which gained massive international media coverage seen by nearly 138 million people.<sup>57</sup> Capitalizing on this success, the rugby ball will be reused at a Rugby World Cup 2011 Pool Allocation Draw in December 2008 where a total of 250 international media outlets will be present.<sup>57</sup>
- **Tourism New Zealand Café** – This travel café was opened in Tokyo in 2007 and welcomed 18,779 customers during its first few months.<sup>58</sup>

## Key Learnings:

- ✓ **Effective use of new technology and media can greatly enhance reach and have a positive impact on behavioural outcomes.**
- ✓ **Generation of positive word-of-mouth attention, media coverage and public relations can enhance a destination's top-of-mind profile.**

# Australia

## Profile:

- Tourism Australia, an agency of the Australian Government, promotes Australia internationally and domestically.
- Tourism Australia spent AU\$88 million (\$1CDN=\$0.95AU) on advertising, promotion and publicity in 2006<sup>59</sup> and its operational budget was AU\$164 million in 2007/08.<sup>59</sup> Looking forward, the Australian Government has pledged to invest a record AU\$555 million in Tourism Australia from 2007-2010.<sup>58</sup>

- Tourism Australia is considered a top tourism marketing organization mainly due to its memorable and effective campaign: “Come and Say G’Day! (Shrimp on the Barbie)” that ran from 1984 to 1990<sup>60</sup> (Note: “So where the Bloody hell are you?” campaign (2006/07) has been criticized as being ineffective in the three countries with most exposure to the advertising.<sup>61</sup>).
- **Mix of Marketing Techniques** - Tourism Australia uses a mix of marketing techniques such as: television programming, its website (australia.com), digital communications, advertising, public relations and travel trade activities like trade events to increase knowledge and to build a strong image of what Australia is and what it offers potential travellers.<sup>58</sup>
- **Partnerships with Television Media** - Tourism Australia has supported key initiatives (advertorials, local experts vignettes, etc.) with National Geographic and Discovery Channel that have enhanced the destination’s brand equity globally by exporting the Australian travel experience to target audiences.<sup>58</sup>
- **Creative PR buzz/Publicity** – Tourism Australia has facilitated events such as: “G’Day USA 2007” (which generated 400+ media reports, delivering 400 million global audience impressions valued at US\$70 million); and the creation of an “Aussie Biosphere” in Toronto as part of “G’Day Toronto: Australia Week 2007.”<sup>58</sup> In 2003/04, total publicity value for its visiting journalists program generated \$236.8 million AU\$ (generating an ROI of 1000:1).<sup>62</sup>

## Key Learnings:

- ✓ **Before taking large risks with costly provocative creative, it is important to assess the culture, traditions and customs of markets AND pre-test the creative with the markets.**
- ✓ **Storytelling can help connect with consumers on an emotional level.**

# Australia (Cont'd)

- **Cinema/TV Spots** - Tourism Australia has partnered with Australian writer, producer and director Baz Luhrmann to capitalize on the global release of Luhrmann's epic film "Australia":
  - Two campaign cinema/TV spots conceived by Luhrmann will run in 22 of Tourism Australia's markets. They will also be supplemented by online and print advertising. <sup>63</sup>
  - Unlike most destination-based marketing which focuses on appealing pictures of people and places, the campaign is completely unique in that it is "cinematic in style, is based on a story with a beginning, middle and end, is sophisticated and highly emotive."<sup>63</sup> It will also help to expand on the "walkabout" theme – an exclusively Australian concept that is deeply rooted in Aboriginal culture.<sup>58,63</sup>
  - Leveraging the film "Australia" seems to fit in well with Tourism Australia's strategy of "using storytelling as the key means for communication, leading to increased use of digital, PR and events and less reliance on traditional advertising."<sup>64</sup>
  - Note: The Crocodile Dundee movie generated a 20.5% increase in U.S. visitors to Australia from 1981 to 1988. New Zealand also experienced an increase in tourism in response to the release of the Lord of the Rings film trilogy. <sup>55</sup>
- **Focus on the emotional aspects of the tourism experience** - Tourism Western Australia used research by TNS in the development of their "The Real Thing" campaign. Qualitative research uncovered brand values that gave a distinct and innovative focus to the creative's message. This resulted in an increase of at least 33,000 interstate visitors to the region and an ROI of approximately 23:1.<sup>65</sup>

## Key Learnings:

- ✓ Heavy ad spending carries heavy risks, but can deliver overwhelmingly positive results when well planned, integrated and conceptually coordinated.
- ✓ Unique and well targeted event promotions can deliver very strong ROI when linked to an overall brand performance.



# Ireland

---

## **Profile:**

- The marketing budget of Tourism Ireland totalled €54 million in 2006, an increase of 6% on 2005 (jointly funded by the Irish Government and the Northern Ireland Executive). This is comprised in part by €39 million from the government's Tourism Marketing Fund. This fund increased by 12.5% in 2007 relative to 2006 and represents the largest ever Irish government budget for Irish tourism promotion. <sup>66</sup>
- From January to October 2006, 1,700+ overseas media representatives visited Ireland generating 3,760 major articles and broadcasts valued at €71 million. <sup>66</sup>

- **www.discoverireland.com Website** – Launched in 2006, the €2.6 million global website includes information on 30,000 tourism products and is comprised of 41 international consumer websites available in 19 different languages:
  - Five million people visited the site in 2006. There was a +22% increase in unique visitors to the website and an increase of +27% in click-throughs to tourism partners. The number of unique visits from January to June 2008 totalled 5.1 million (up +52% over 2007, including a record +1 million unique visitors in the month of March 2008 alone).<sup>66</sup>
  - Recognizing the increasing value of digital marketing, Tourism Ireland proposes to increase its digital marketing activity to approximately 24% of its total spending in 2008 (an increase of two thirds over its 2007 investment). The majority of this investment will focus on new innovative digital platforms and improvements to the functionality and usability of its websites. <sup>66</sup>

## **Key Learnings:**

- ✓ **Integration of offline and online (or, traditional and non-traditional) marketing approaches can build a holistic marketing platform that is more powerful than any one component.**

# Ireland (Cont'd)

- **Integrated Online/Offline 2008 Pilot Campaign** - Part of Tourism Ireland's enhanced focus on digital spending is evidenced by its integrated online/offline 2008 pilot campaign in the Netherlands. The campaign used media channels such as SMS (text messaging), YouTube, video banners, branded tuk-tuks, vodcasting (the video counterpart of podcasting) and online games to connect with a market with high internet penetration. <sup>67</sup>
- **Overseas Ad Campaign-** In January 2006, a three year €50 million ad campaign (broadcast and print advertising, consumer and trade promotions, direct marketing, PR and online advertising) firmly rooted in consumer research in key markets was rolled out globally. In the UK, the ad campaign was rated in Marketing Magazine's Adwatch column as one of the top 20 most recalled ads by British TV viewers along with household brands L'Oreal, McDonalds and Coca-Cola. The campaign had an estimated audience of 200 million people worldwide in 2006.<sup>68</sup>
- More recently in March 2008, Tourism Ireland launched a €37 million, six-month worldwide campaign. This campaign includes: core TV and print advertising; expanded publicity; promotional and sponsorship campaigns; "tell a friend" strategy (a reflection of the increased importance placed on word-of-mouth); direct marketing on-and-offline; and vigorous pursuit of niche business and luxury segments.<sup>69</sup> An example of a multi-media promotion used was a competition that encouraged consumers to find a hidden St. Patrick in a range of press, online and outdoor advertising. Tourism Ireland also began rolling out a very specific form of video-based online advertising based on keyword association (possibly using Google Adwords). <sup>70</sup>
- It is estimated that during 2008-2010, Ireland will have earned tourism revenues in the range of €15.7/£10.5 billion to €16.1/£10.8 billion (based on an estimated yield of 29.5 to 30.2 million visitors and from between 13.7 to 14.1 million promotable visitors). <sup>66</sup>

## Key Learnings:

- ✓ **Marketing tactics that encourage word-of-mouth promotion are growing increasingly popular and effective in terms of financial returns.**
- ✓ **Unique and well targeted event promotions can deliver very strong ROI when linked to an overall brand performance.**

# Las Vegas

## Profile:

- Marketing for the city of Las Vegas is directed by the Las Vegas Convention and Visitors Authority (“LVCVA”) which spent roughly US\$320 million from 2004-2009<sup>71</sup> on total advertising billings. In 2007 alone, US\$131 million was spent on marketing activities. International marketing costs were increased from \$12 million in 2006 to \$17 million in 2008.<sup>72</sup> The LVCVA’s budget is funded by room tax revenue.<sup>73</sup>

- “What Happens Here, Stays Here” Campaign** – is an unconventional approach that has resulted in one of the more successful and memorable tourism-based campaigns in recent years. Entering its sixth year, the “Vegas Stories” campaign focuses on building an emotional connection between consumers and Las Vegas. In order to deliver the brand message and properly reflect the Las Vegas “experience”, the brand position is simply “Adult Freedom.” The real power of the Vegas strategy is that half the communication takes place in the consumer’s mind: “No matter what country we are in, we always leave it up to the consumer to fill in the blanks.”<sup>74</sup>
- Focus groups were held in target markets to understand how messages should be customized for these markets. Based on this feedback, campaign developers learned that “the creative wasn’t provocative enough for the U.K., that it needed to be toned down for Mexico and could be pretty much left alone in Western Canada (Eastern Canada leaned more towards European open-mindedness).”<sup>75</sup>
- In a 2005 independent study by Landor & Associates (the ImagePower® Newsmaker Brands Survey), the “What Happens Here, Stays Here” campaign was credited with assisting Las Vegas in being named the #5 “hot brand” in America. In 2006, Las Vegas reached a remarkable #2 only behind Google. The city’s provocative slogan has helped boost its visitor count from 35.5 million in 2003, when it was introduced, to 39.2 million in 2007, an increase of 9%. Visitor spending increased from US\$39.4 billion in 2006 to US\$41.6 billion in 2007, an increase of 5%, which resulted in a ROI of roughly 16.5:1 in 2007.<sup>73</sup>
- While the campaign is slowly moving to the online world with the launch of an official brand page on YouTube, the majority of the campaign consists of traditional media (TV, print and radio).<sup>76</sup>

## Key Learnings:

- ✓ **Building a consumer’s emotional connection with a brand can produce better results than a consumer’s connection with a product.**
- ✓ **Emotional connections with a brand trigger imagination and cultivates market interest.**
- ✓ **Emotive content has to be tailored to specific target markets.**

# British Columbia

---

## **Profile:**

- Tourism BC is the tourism agency of the Province of British Columbia. It markets BC both domestically and internationally. Tourism BC is responsible for marketing the Super, Natural British Columbia® brand.<sup>77</sup>
- Tourism BC received a World Travel Market Global Award in 2008.<sup>78</sup> With a marketing budget of \$32.2 million in 2007/08, Tourism BC has not only been able to develop award-winning campaigns, but campaigns that are also successful in terms of ROI and achieving large amounts of unpaid editorial coverage worldwide.<sup>77</sup>

- **“BC Escapes” campaign** – The campaign was designed to generate short and medium term travel in the spring and summer by encouraging frequent travelers to get away to British Columbia. The campaign targeted key markets such as BC, Alberta, Ontario, Washington and California. It consisted of direct response television, newspaper, online advertising and direct mail. This integrated campaign has delivered strong results since 1997. In 2006 for instance, the \$5.5 million campaign delivered approximately \$100 million in tourism revenues – resulting in an 18:1 ROI for the province. Tourism BC’s tracking “confirmed 40% of respondents ended up travelling to/within British Columbia” (although it is not clear how this was tracked).<sup>79,80</sup>
- The 2006 BC Escapes campaign was awarded with two Gold awards at the Canadian Marketing Awards in the categories of Leisure/Travel Products and Services and Direct Response-Direct Mail. According to Tourism BC, the direct mail campaign achieved a response rate of just over 21%.<sup>79</sup>

## **Key Learnings:**

- ✓ **Even with a limited-budget, an integrated tourism marketing campaign can deliver significant ROI.**

# British Columbia (Cont'd)

---

- **HelloBC website** - and other online initiatives received a substantial amount of both attention and investment by the agency with \$2.4 million expenditure in 2007/08. The HelloBC website has been updated with consumer blogs, tourism business listing programs, YouTube videos, and access to a corresponding Tourism BC's Facebook presence. Tourism BC is highly advanced with respect to customizing communications to individual traveller using these tools. <sup>77</sup>
- Tourism BC is also a strong proponent of targeting key media outside British Columbia and has been able to generate positive advertising equivalency returns both domestically and internationally. In North America, \$1 million of media relations investment resulted in \$140 million in unpaid editorial coverage, with a similar investment achieving \$15.5 million of unpaid coverage in Europe. In Asia, \$0.5 million spent on relations achieved an advertising equivalency of \$59.5 million (all results for 2007/08). <sup>80</sup>

## Key Learnings:

- ✓ **Fostering media relations can yield significant editorial coverage.**
- ✓ **Web-based initiatives can personalize a destination's message.**

# Alberta

---

## **Profile:**

- Travel Alberta is the official destination marketing organization for the province of Alberta. It is funded by the Government of Alberta through a tourism levy on visitor accommodation. It promotes Alberta as a tourist destination on a regional, national and international level. <sup>81</sup>

- **Creative Campaigns** – Travel Alberta’s creativity stands out regionally and on the world-stage:
  - Most notably, its advertisement that incorporated: Toronto Transit Commission subway benches as chairlifts with a mall mural behind each bench offering a breathtaking view of the Canadian Rockies and a floor decal with a view past the “riders” skies to the slopes below. This was short-listed for an award at the 55th International Advertising Festival in Cannes, France. <sup>82</sup>
  - In 2008, Travel Alberta launched a \$5.6 million regional tourism marketing campaign targeting Albertans and visitors from Western Canada to “stay a little bit longer.” This multi-media campaign consists of: television advertisements supported by radio, travel and events guides and innovative billboards. <sup>81</sup>

## **Key Learnings:**

- ✓ **Possessing a sufficient marketing budget allows a tourism jurisdiction to explore a large variety of innovative marketing and advertising tactics.**
- ✓ **Sufficient marketing budget is particularly relevant to destinations attempting to establish an initial presence and gain profile.**

# Alberta (Cont'd)

---

- **Innovative Techniques** - Travel Alberta's "marketing activities have ranged from traditional media advertising to interactive OOH to guerrilla night-time marketing campaigns all geared toward breaking through a competitive and cluttered tourism market to reach their target audience." <sup>82</sup> For example:
  - One of its campaigns sought to connect emotionally with people by demonstrating how they can "escape" the daily urban grind by relaxing in the peace of the Rocky Mountains. The campaign projected a five-minute video loop onto the facades of buildings in various high-traffic locations in New York City, Los Angeles and Long Beach, California. Videos showed tenants of an imaginary apartment complex climbing out of a window, negotiating their way across an evergreen tree into the wilds of the Rocky Mountains on the other side to go fishing, mountain biking and horseback riding. <sup>82</sup>
  - Development of film location driving tours in web-based and in-car-companion map formats that provide directions, movie location information and behind-the-scenes highlights of over 100 film locales (major Hollywood films and Canadian television shows). <sup>81</sup>
  - Note: While it is difficult to quantify the effectiveness of these type of campaigns in terms of measurable ROI, these type of campaigns are a way of generating unpaid media interest. In 2007, more than "\$82 million worth of media coverage of Alberta was generated." <sup>81</sup>

# Newfoundland and Labrador

---

## **Profile:**

- Newfoundland and Labrador Tourism is an agency of the Government of Newfoundland and Labrador. Its marketing budget is currently \$12 million <sup>85</sup> and represents a 100% increase since 2004. It is projected to increase to \$17.2 million in 2008/09. <sup>86</sup>
- Newfoundland and Labrador has seen an increase of out-of-province visitation by 15% since 2003, contributing roughly \$365 million in additional revenue. <sup>87</sup>

Newfoundland and Labrador Tourism has held notable campaigns:

- **“Newfoundland and Labrador’s Fresh Air” campaign (2007 and 2008)** - was comprised of OOH displays, radio and content promotions targeted to Toronto and Ottawa markets. The campaign involved a 3D window superboard posted on the Gardiner Expressway in Toronto, with actual curtains blowing from “a Newfoundland and Labrador fresh sea breeze”. Initially in 2007, the superboard was a semi-static display, but in 2008, the superboard was hand-painted by an actual artist over a period of three weeks. Using a location carefully chosen to allow frustrated expressway drivers to experience what it would be like in Newfoundland and Labrador during slow rush-hour traffic. In addition to the Toronto superboard, the Fresh Air campaign also included a giant 3D clothesline superboard in Ottawa. <sup>85</sup>
- **“Get Carried Away” campaign** - This campaign provided Torontonians with a free 15-minute ride in a specially designed taxi-like car. The car, fitted with pillows, tourism guides and a touch-screen television playing footage of the province, and was driven by a Newfoundlander ready to answer any questions about the province. The campaign also included a cross-promotion with WestJet, whereby passengers could win a trip for two to Newfoundland. <sup>88</sup>

## **Key Learnings:**

- ✓ It is important to leverage a strong differentiating element of a destination as part of the strategic tourism marketing message.
- ✓ It is important to target segments or geographic markets where a differentiating element is of particular relevance.
- ✓ Industry partnerships and cross-promotions can squeeze more out of a limited budget.



# Newfoundland and Labrador (cont'd)

---

- **“No Place Like Home” campaign** – This campaign included television, print and radio advertising that directed people to the website [www.noplacelikehome.travel](http://www.noplacelikehome.travel). It featured getaway packages and value coupons for travel and activities throughout Newfoundland and Labrador. This, along with the 2007 version of the “Fresh Air” campaign, was awarded the prestigious 2007 Tourism Industry Association of Canada’s Marketing Campaign of the Year Award.<sup>87</sup> In September of 2007, the province won an Atlantic region Innovation, Creativity, and Enterprise (ICE) advertising award for Marketer of the Year.<sup>89</sup>



# Appendix 1 – Glossary

---

- 3D window superboard: strategically placed three-dimensional window advertising board.
- Blog: a contraction of the term “web log”, a web site, usually maintained by an individual with regular entries of commentary, descriptions of events or other material such as graphics or video.
- Content Promotion: online awareness building that include contextually relevant link and public relations building.
- Guerrilla marketing: an unconventional and aggressive system of promotions, running on a very low budget, by relying on time, energy, and imagination.
- OOH displays: Out-Of-Home advertising displays, essentially any type of advertising that reaches consumers while they are outside their homes (or offices).
- Podcast: a series of audio or video digital media files which is distributed over the internet by syndicated download, through web feeds to portable media players and personal computers.
- SMS: Short Message Service, a communications protocol allowing the interchange of short text messages between mobile telephone devices.
- Tuk-tuk: a motor vehicle that is one of the chief modes of transport across many parts of South and East Asia, especially as a vehicle for hire.
- Video loops: a video (one or more) that is set to loop.
- Viral marketing: marketing techniques that use pre-existing social networks to produce increases in brand awareness or to achieve other marketing objectives. Viral messages refer to marketing messages that are passed from person to person through their social networks.
- Webisode: a short episode that airs initially as an internet download or stream as opposed to first airing on broadcast or cable television.
- YouTube: a video sharing website where users can upload, view and share video clips.

Source: [wikipedia.org](http://wikipedia.org) / *Microsoft Encarta Online Encyclopaedia*

# Appendix 2 – Interview Questions

---

A “soft” questionnaire outline was set to cover three key areas of investigation:

1. Trends in marketing
  - Best means of reaching consumers
  - Real and fad trends
  - Traditional vs. non-traditional / offline vs. online marketing approaches
  - (If applicable) A degree to which the organization follows the trends
  - (If applicable) Marketing spend breakdown among various media
  - Perceived effectiveness of media and public relations
2. Successful marketing campaigns
  - Tourism and non-tourism examples
  - Reasons why these campaigns were great
  - Organization's own successes (marketing and advertising examples) and related ROI
3. Ontario tourism marketing
  - General thoughts and comments
  - Suggestions

# Appendix 3 – Summary of Stakeholder Interviews

---

## Trends in Marketing

- Stakeholders/experts were asked to identify promising trends in marketing:
  - Overall agreement was that in order to identify the best means to reach a market, marketers must first understand the demographic and psychographic segmentation of that market. It was noted that customer segmentation should be part of an organization's business strategy: focused marketing on selected segment(s) and being relevant by resonating with the target segment(s) even if this means that other customers are not reached.
  - There was unanimous accord that an effective online presence (e.g., well-maintained websites, banner ads and database emails) is critical to reaching new and existing markets, especially in North America and Europe. Note: in countries with low internet penetration, travel trade remains the most effective method.
  - Specific trends stressed included two-way, web-based, opt-in communication methods. Mass collaborations (projects formed by a collective action) and social media were predicted to blossom with the increased use of new technologies that allow for greater word-of-mouth communications.
  - Overall, stakeholders/experts felt that social marketing was still be in its infancy - not only in terms of new tools being introduced almost daily in the marketplace, but also in terms of marketers' understanding of how best to leverage social marketing tools. An example cited was that to simply "dump" information onto a social networking site does not mean that an organization is social marketing or does it promote interaction with consumers. Time and effort were emphasized as necessary to understand how to engage and interact consumers - whether on blogs, Facebook, YouTube, Twitter or through mobile advertising. As one expert noted, social marketing in the virtual world is not so much "here to stay" as "here to evolve."
  - The majority of stakeholders/experts responded positively when asked whether their respective organizations are focusing more on non-traditional marketing. While offline/online marketing budget breakdowns ranged from 20/80 (e.g., Via Rail or Metro Toronto Convention Centre) to 60/40 breakdown (e.g., Fairmont and Travel Alberta for specific segments), most indicated an ideal split of 50/50.

# Appendix 3 – Summary of Stakeholder Interviews (Cont'd)

---

## Trends in Marketing – cont'd

- Stakeholders/experts emphasized that public relations/media relations tactics have been very effective for some tourism destinations. Public relations/media relations can support other marketing efforts but can be used as a technique in reaching consumers who intentionally avoiding advertising. An editorial article can relay a message to a consumer when it is unexpected or unanticipated.
- Articles in specialty travel magazines such as Condé Nast or National Geographic Travel, focused on niche products (eco-tourism, geo-tourism, girls' vacations, “man-cations”, etc.) and crafted with creative and well-written editorials have an ability to inspire travel to a destination, and they can do so on a very limited (if any) budget.

# Appendix 3 – Summary of Stakeholder Interviews (Cont'd)

---

## Examples of Good Marketing

- Stakeholders/experts were asked to identify the best advertising campaigns that come to mind and what specifically makes them superior to others:
  - Non-tourism examples mostly focused on the automotive sector (e.g., eye-catching graphics, speed, sexy images) and technology (humorous Apple vs. Windows ads).
  - In tourism, Las Vegas came out as a clear top-of-mind winner, mostly recalled by/ praised for its superior tagline “Whatever happens in Vegas, stays in Vegas”. Others acknowledged destination advertising such as New Zealand’s “Summer is just beginning there”, Club Med’s “Where happiness means the world”, and Ireland’s “Right here, right now” where an underlying theme in campaigns was selling an experience rather than the product. With regard to Canadian tourism jurisdictions, the CTC and Tourism BC were praised.
  - The CTC’s innovative commercial marketing campaign was commended as a breakthrough effort for storytelling particularly its user-generated video clips. It was felt that the edgy, unpolished 15-second videos have connected with consumers on an emotional level to create an inspirational “story” about Canada’s travel product/experience. It was noted that the resonance of this campaign was so large that the volume of visitation to the CTC website visitation had increased seven times as compared to previous volume levels. Note: The CTC advised that this campaign is a key part of the CTC’s global campaign in 2009 that will target nine foreign markets, specifically travellers seeking fulfillment through authentic experiences and for whom travel is a priority even in times of an economic downturn.

# Appendix 3 – Summary of Stakeholder Interviews (Cont'd)

---

## Examples of Good Marketing – cont'd

- Stakeholders/experts also highlighted the “BC Escapes” campaign and the research-driven Tourism BC “Outdoor Adventure” campaign that targets the California market as examples of good marketing.
- The Tourism BC “Outdoor Adventure” campaign was commended as an effective example of a campaign that “spoke” the language of its target audience. Recognizing that the young, extreme outdoor sports enthusiast market has its own networks and strong word-of-mouth and social media interconnections, the campaign tagged “BC Bragging Rights” as a way to “get them talking.” The campaign includes two iconic British Columbia adventures: mountain biking and white-water rafting:
  - For the mountain biking campaign, visuals included a painted wall showing a dangerous mountain biking trail on a background of the North Shore landscape with the tagline: “It’s only death defying if you live.”
  - For the white water rafting adventure, the advertising medium used were local buses which were painted in a scene depicting white-water rafting. This created the impression that passengers “were in the adventure.” The featured tagline was: “Tan lines fade, scars last forever.”



# Appendix 3 – Summary of Stakeholder Interviews (Cont'd)

---

## Perceptions of Ontario Travel Marketing

- Stakeholders/experts were asked to provide their perceptions of Ontario's tourism marketing:
  - Overall, stakeholders/experts described Ontario's provincial-level advertising as “inviting”. In terms of specific, positive marketing elements, Ontario's “exotic” TOARINO” campaign: “There’s No Place Like This” musical signature and related TV ads were seen as having strong emotional draw and pull. Unanimously, stakeholders/experts agreed that marketing of Ontario tourism has contributed to increasing awareness about the province with balanced targeting to Ontarians and new visitors from other provinces and the United States.
  - Stakeholders/experts noted three caveats in promoting Ontario as a safe, traditional, and familiar destination. First, such positioning offers very limited differentiation from other destinations in Canada and might not always identify with the market's needs and trends (i.e., younger demographics). Second, it might give an impression that the advertising lacks a strong core message. Also, there is not provoke a sense of urgency to visit the province.
  - Suggestions from the stakeholders/experts included:
    - Limiting the use of traditional “Canadian scenes” that for some younger segments may be perceived as “cold, barren, and boring” and to instead focus on meaningful experiences, real people, authentic portrayal of activities and events, which are unique to Ontario and tap into the emotional state of travellers;
    - Limiting the variety of “pretty pictures” and instead focusing on specific differentiating aspects of the province's tourism product; and
    - Marketing Ontario beyond Niagara Falls, Toronto and Ottawa, which could create a better balance between urban and rural experiences. Such differentiation was suggested as a possibly way to provoke a sense of urgency to visit Ontario (by igniting excitement and promoting the province as a destination that is compelling to visit as opposed to it being a place that one can see “some other time” or on a business trip).

# Appendix 4 – Bibliography and References

---

## **Bibliography**

Ministry of Tourism/OTMPC/Competitiveness Study Data sources reviewed for Ontario:

- A. Ontario Ad & Brand Tracking Series, 2004-2008.
- B. Montreal Market Analysis. January 2008.
- C. Working Together to Help Ontario's Tourism Industry Grow, Proposed 2008-2009 OTMPC Marketing Plan.
- D. OTMPC Industry Partnership Proposal Program.
- E. Mapping Ontario's Tourism Future: A Starting Point for Discussion. Spring 2008.
- F. Ontario Tourism Market Assessment Research Study, 2009.

## **References**

1. TIAC National Awards for Tourism Excellence 2008. [http://www.tiac-aitc.ca/english/NTAwards\\_winners.asp#otmpc](http://www.tiac-aitc.ca/english/NTAwards_winners.asp#otmpc). Retrieved December 8, 2008.
2. Google Earth Enterprise. [http://earth.google.com/enterprise/earth\\_enterprise.htm](http://earth.google.com/enterprise/earth_enterprise.htm), retrieved February 9, 2009.
3. WestJet. [www.westjet.com](http://www.westjet.com)
4. Annual Report 2007, [www.westjet.com](http://www.westjet.com)
5. Williams, N. "Why it's (still) good to be WestJet." Strategy Magazine. November 2005.
6. Cassies 2006 Cases: brand/case WestJet, available from [www.casies.ca](http://www.casies.ca). Retrieved November 5, 2008.
7. Bourdeau, A. "WestJet is stalking me – and I like it." Strategy Magazine. October 2006.
8. Fairmont Hotels and Resorts [www.fairmont.com](http://www.fairmont.com)
9. "City, Fairmont Hotels & Resorts work together to revitalize University Avenue Triangle." City of Toronto News Releases. [www.toronto.ca](http://www.toronto.ca). Posted October 2, 2008, retrieved October 29, 2008.
10. Fitzgerald, K. "Pioneering hotel company encourages locations to compete for environmental innovation." Advertising Age. June, 2008.
11. "Fairmont Hotels and Resorts: Case Study." The Center for Hospitality Research, Cornell University. <http://www.hotelschool.cornell.edu/research/chr/pubs/> Published May 20, 2003, retrieved October 29, 2008.

## Appendix 4 – References (Cont'd)

---

12. Lewis, R. "Hotels choose Fresh VRX content." <http://www.techvibes.com/> Posted December 13, 2007, retrieved October 29, 2008.
13. "Jens Thraenhart, Director of Internet Strategy at Fairmont Hotels & Resorts, Selected as a Travel Industry Rising Star." *Travel Agency Magazine*, also available at [www.travelagency.com](http://www.travelagency.com). July, 2003.
14. Personal interview with a Fairmont representative. November 5, 2008.
15. "Fairmont Hotel's Jen Thraenhart: what this director of internet strategy has to say about metrics and research." <http://www.imediaconnection.com/content/6868.asp/> Retrieved October 29, 2008.
16. "Fairmont Hotels & Resorts: Website Development and Enhanced CRM." Accenture. [http://www.accenture.com/Global/Services/By\\_Industry/Travel/Client\\_Successes/FairmontCrm.htm](http://www.accenture.com/Global/Services/By_Industry/Travel/Client_Successes/FairmontCrm.htm). Retrieved October 29, 2008. See also Accenture Case Study: Fairmont Hotels & Resorts, Expanding Possibilities from [www.accenture.com](http://www.accenture.com)
17. Beal, B. "Customer loyalty, profitability drive BI consolidation at Fairmont." *SearchCRM.com*. [http://searchcrm.techtarget.com/news/article/0,,sid11\\_gci1254150,00.html](http://searchcrm.techtarget.com/news/article/0,,sid11_gci1254150,00.html). Posted May 8, 2007, retrieved October 29, 2008.
18. "Fairmont Hotels & Resorts Checks In with MapInfo for Target Marketing Success." *Business Wire*. February 15, 2005. See also MapInfo Case Study: Fairmont Hotels and Resorts from [www.mapinfo.com](http://www.mapinfo.com)
19. "Fairmont and Lexus power up new marketing alliance." Posted July 24, 2008, retrieved October 29, 2008.
20. Fairmont Investor. [http://www.fairmontinvestor.com/EN\\_FA/Articles/RecentNews/FairmontLexus.htm](http://www.fairmontinvestor.com/EN_FA/Articles/RecentNews/FairmontLexus.htm) Retrieved October 29, 2008. See also [www.lexus.com/owners](http://www.lexus.com/owners)
21. Alberta Advantage Campaign. <http://www.karo.com/portfolio/viewProject.asp?PID=66&recpos=1&list=4%2C66%2C72%2C116%2C208>. Retrieved Oct. 29, 2008.
22. "Investing in an icon: Why everyone wants a piece of Tim Hortons." *Ottawa Citizen*, March 19, 2006.
23. "Timbit Nation." *Toronto Star*, March 26, 2006.
24. "Brand Champions: Tim Horton's." *One Degree*. <http://www.onedegree.ca/2006/11/brand-champio-2.html> Posted Nov. 16, 2006. retrieved Nov. 2, 2008.
25. Williams, N. "Tim Hortons: The Grassroots Champion." *Strategy Magazine*, May 2007.
26. Williams, N. "Special report: Cannes contenders. Editor's pick – Tim Hortons." *Strategy Magazine*, June 2006.
27. Canadian Tire. [www.canadiantire.com](http://www.canadiantire.com)

## Appendix 4 – References (Cont'd)

---

28. Djukic, M. "Switching gears." Strategy. October 2008.
29. "Agency of the year: Taxi." Strategy. November, 2006.
30. Mazurkewich, K. "Tracy Fellows Evolution: Building a Canadian icon one ad at a time." Strategy. March 2007.
31. Krishan, S. "Canadian Tire attempts to strike emotional chord." Financial Post, Oct. 17, 2008.
32. Kraft, [www.kraft.com](http://www.kraft.com)
33. Djukic, M. "Kraft Hockeyville recruits via social media." CBC Sports, [www.cbcsports.ca/hockeyville](http://www.cbcsports.ca/hockeyville), retrieved Oct 31, 2008.
34. Annual Report, 2007, Telus. Available at [www.telus.com](http://www.telus.com)
35. Telus [www.telus.com](http://www.telus.com)
36. Djukic, M. "Consistency pays off for Telus." Strategy Magazine. October 2008.
37. Kirbyson, G. "Animal instincts." Winnipeg Free Press. February, 2, 2004.
38. Vinakmens, K. "Telus monkeys reach cult status." Strategy, December, 2002.
39. "Tim Horton's Every Cup Tells A Story" [www.everycup.ca](http://www.everycup.ca)
40. Neff, J. "Better ROI From Youtube Video Than Super Bowl Spot." Advertising Age. October, 2006.
41. Garfield, B. "Tackling ugly truth, Dove effort evolves beautifully." Advertising Age. October, 2006.
42. Campaign For Real Beauty. Dove. <http://www.campaignforrealbeauty.com/share.asp?section=share>, retrieved February 2, 2009.
43. York, E.B. "Kraft Tests Recipe for Selling in a Recession." Advertising Age, Nov. 10, 2008.
44. Diamond Shreddies, [www.diamondshreddies.com](http://www.diamondshreddies.com)
45. Alexander, R. "Diamond Shreddies." Brandchannel. May 5, 2008.
46. Toane, C. "New: Diamonds are a square's best friend." Strategy. June 2008.
47. Kingston, A. "Diamonds are a brand's best friend: How a 26-year-old advertising intern saved Shreddies." McLean's. May 7, 2008.
48. "Fourth CMOST Study Demonstrates Online's Ability to Influence Behavior in Short Period of Time." Interactive Advertising Bureau of Canada. <http://www.iabcanada.com/newsletters/050316.shtml>, retrieved Nov. 3, 2008.

## Appendix 4 – References (Cont'd)

---

49. Yazdani, A. "Canadian Tire spared us more agony." London Free Press, Mar. 13, 2006.
50. Laird, K. "Kraft shared strong feeling for peanut butter." Marketing Magazine. July, 2008.
51. Fredrix, E. "Associated Press, Food makers still have appetite for advertising: Big manufacturers see opportunity to reinforce value of their brands." Sept. 14, 2008.
52. Koodo. [www.koodoomobile.com](http://www.koodoomobile.com)
53. Toane, C. "Taxi's mobile workout." Strategy Magazine, November 2008.
54. Annual Report 2006-2007. Tourism New Zealand. Available at [www.tourismnewzealand.com](http://www.tourismnewzealand.com).
55. "Gold for New Zealand in PATA awards 2008." Tourism News, Tourism New Zealand, August 2008. [www.tourismnewzealand.com](http://www.tourismnewzealand.com). Retrieved October 22, 2008., c.f. Hudson, S., and B. Ritchie. Promoting Destinations via Film Tourism: An Empirical Identification of Supporting Marketing Initiatives. Journal of Travel Research. May 2006.
56. Hembry, O., "NZ's 100% Pure and Google Earth in world first." New Zealand Herald, April 27, 2007.
57. "Rugby Ball Heads to London." Tourism News, Tourism New Zealand, August 2008. [www.tourismnewzealand.com](http://www.tourismnewzealand.com). Retrieved October 22, 2008.
58. Annual Report 2006-2007, Tourism Australia. Available at [www.tourism.australia.com](http://www.tourism.australia.com)
59. Portfolio Budget Statements 2008-2009, Tourism Australia. Available at [www.tourism.australia.com](http://www.tourism.australia.com)
60. Baker B. and P. Bendel. "Come and Say G'Day!" ATME, [http://www.atme.org/pubs/archives/77\\_1898\\_11926.cfm](http://www.atme.org/pubs/archives/77_1898_11926.cfm). Retrieved Nov.10, 2008.
61. Topsfield, J. "Aussie tourism loses its 'mojo'." Stuff. [www.stuff.co.nz/4572391a34.html](http://www.stuff.co.nz/4572391a34.html). Retrieved Nov.10, 2008.
62. "Growing Yield- A case study: Japan." Tourism Australia, May 13, 2005. [www.tourism.australia.com](http://www.tourism.australia.com). Retrieved Nov. 8, 2008.
63. "Australia" Campaign Facts, Tourism Australia, 2008. [www.tourism.australia.com](http://www.tourism.australia.com). Retrieved Nov. 8, 2008.
64. Luhrmann, B. "Campaign Strategy Brochure." Tourism Australia, October 2008.
65. "Social case study - Positioning within the tourism industry." TNS. 2008.

## Appendix 4 – References (Cont'd)

---

66. Ambition For Growth: Marketing Plan 2008. Tourism Ireland. Available from [www.discoverireland.com](http://www.discoverireland.com)
67. "Innovation in the Netherlands." Contact, Tourism Ireland, April 2008.
68. "Tourism Ireland Aims to Attract Over 9 Million Visitors to Island of Ireland in 2007." Tourism Ireland Press Release, December 4, 2006. [www.discoverireland.com](http://www.discoverireland.com). Retrieved on October 29, 2008.
69. "Tough going but much to play for." Contact, Tourism Ireland, July 2008.
70. "Multi-million Promotion of Ireland Underway." Contact, Tourism Ireland, April 2008.
71. Flass, R. "R&R Gains \$320 Mil. Vegas Tourism Extension." Adweek, Nov. 12, 2003.
72. Voight, J. "Vegas: By the numbers." Adweek. September 3, 2007.
73. "Historical Las Vegas Visitor Statistics." Las Vegas Convention and Visitors Authority. Available from [www.lvcva.com](http://www.lvcva.com)
74. O'Keefe, R. "WHHS Story." Travel Marketing Decisions, Vol. 9 (1), 2007.
75. Voight, J. "How to Customize Your U.S. Branding Effort to Work Around the World." Adweek. September 3, 2007.
76. Mahmud, S. "Online Video Gives Vacation Marketing a Boost." Adweek. September 15, 2008.
77. Tourism BC. [www.tourismbc.com](http://www.tourismbc.com)
78. "Tourism BC receives International Recognition at World Travel Market." Tourism BC, Press Release. [www.tourismbc.com](http://www.tourismbc.com). Posted November 10, 2008, retrieved November 11, 2008.
79. "Tourism BC shines at Canadian Marketing Awards." Tourism BC Press Release. [www.tourismbc.com](http://www.tourismbc.com). Posted November 20, 2006, retrieved November 11, 2008.
80. Annual Report 2007-2008. Tourism BC. Available from [www.tourismbc.com](http://www.tourismbc.com)
81. Strategic Tourism Marketing Plan 2008-2011. Travel Alberta. Available at [www.travelalberta.com](http://www.travelalberta.com)
82. "Travel Alberta goes to Cannes, via the Toronto subway system." Travel Alberta Press Release, 2008, [www.travelalberta.com](http://www.travelalberta.com). Retrieved October 15, 2008.
83. "Campaign Entices Albertans to Stay in Province." Travel Alberta Press Release. [www.travelalberta.com](http://www.travelalberta.com). Posted April 24, 2008, retrieved October 15, 2008.
84. "Travel Alberta moves mountains to attract U.S. tourists." Travel Alberta Press Release. [www.travelalberta.com](http://www.travelalberta.com). Posted June 10, 2008, retrieved October 15, 2008.

## Appendix 4 – References (Cont'd)

---

85. “Newfoundland and Labrador Opens Giant Window to Fresh Air in Toronto.” Newfoundland and Labrador Tourism Press Release. <http://www.tcr.gov.nl.ca/tcr/>. Posted July 11, 2008, retrieved October 15, 2008.
86. Strategic Plan 2008 to 2011. Newfoundland and Labrador Department of Tourism, Culture and Recreation. Available from <http://www.tcr.gov.nl.ca/tcr/>
87. “Tourism Marketing Campaign Wins Top National Award.” Department of Tourism, Culture and Recreation Press Release. <http://www.tcr.gov.nl.ca/tcr/>. Posted November 6, 2007, retrieved October 15, 2008.
88. Martin, K. “Tired Torontonians get Newfoundland pick-me-up.” Marketing Magazine, July 30, 2008.
89. “Province’s Tourism Marketing Campaign Wins Top Atlantic Award.” Department of Tourism, Culture and Recreation Press Release. <http://www.tcr.gov.nl.ca/tcr/>. Posted September 8, 2007, retrieved October 15, 2008.