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Visitor Inquiries

Call Volume Down; User Sessions at OntarioTravel.net Reach All-Time High

- Calls to the 1-800-ONTARIO Call Centre totalled 189,000 for the period January to July 2005, which was a decrease of 10% over the same period in 2004.
- For the period January to July 2005, user sessions at OntarioTravel.net grew 2% over the same months last year to over 1.3 million. This is the highest level of user sessions ever experienced at the site for the period.

Source: EDS

Economic Outlook

Short Term Economic Indicators

Canada & Ontario

		Q4 2005	2005	2006
Real Gross Domestic Product – % Change over Previous Period	Can	0.7	2.6	2.9
	ON	0.7	2.3	2.9
Consumer Price Index – % Change over Previous Period	Can	0.5	1.8	1.9
	ON	0.6	2.2	2.3
Unemployment Rate	Can	6.7	6.8	6.9
	ON	6.8	6.8	6.8
Personal Disposable Income – % Change over Previous Period	Can	1.2	3.5	4.8
	ON	1.2	3.4	5.0

Source: Conference Board of Canada

Tourism Statistics

International Border Crossings: U.S. Market Continued to Perform Weakly

- Compared to the same months in 2004, U.S. border crossings to Ontario decreased by 9% in May, 7% in June, and 8% in July, keeping U.S. entries to the province down over 2004 year-to-date. For the period January to July 2005, there were approximately 983,000 (or 8%) fewer U.S. border crossings into Ontario than during the same months in 2004.
- A significant decline in U.S. same-day trips to Ontario caused this loss. For the period January to July 2005, American day trips to Ontario decreased by 11% over the same period in 2004 to their lowest level in five years.
- For the period January to July 2005, U.S. overnight entries to Ontario decreased by 2% over the same period in 2004. The decrease resulted from a drop in U.S. overnight auto entries to Ontario (-4%). U.S. overnight non-auto (plane, train, bus, boat) entries to Ontario grew by 4% over the period January to July 2004.

International Border Crossings into Ontario

May to July 2005

Percent Change Over Same Period in 2004

	May	June	July	January - July 2005
Total U.S.	-8.8%	-7.4%	-7.5%	-8.0%
U.S. Same Day	-11.0%	-13.7%	-10.4%	-11.3%
U.S. Overnight	-4.9%	2.5%	-4.0%	-1.9%
Total Overseas	1.7%	12.5%	11.2%	12.1%
Overseas Overnight	3.0%	11.6%	11.1%	12.7%
Total International	-8.0%	-5.8%	-6.1%	-6.7%
Int'l Overnight	-3.4%	4.1%	-1.7%	0.5%

Source: Statistics Canada

What's New in Research?

New Research and Publications

An Ontario-specific report on the third quarter results from the Business Conditions Survey on the travel accommodation industry is available on the Ministry of Tourism's Tourism Research web site at www.research.tourism.gov.on.ca. The Business Conditions Survey is a quarterly publication conducted by Statistics Canada and funded by the Ontario Ministry of Tourism, the Canadian Tourism Commission and Statistics Canada. Results are based on survey questionnaires sent to about 1,400 traveller accommodation providers across Canada.

Ontario's Overnight Visitors with an Outdoor Interest, 2003 report and Ontario's Business & Convention Market, 2003 report are available on the Ministry of Tourism's Tourism Research web site at www.research.tourism.gov.on.ca.

New reports on the awareness and ratings of Ontario's cultural attractions and outdoor destinations by American travellers are available on the Ministry of Tourism's Tourism Research web site at www.research.tourism.gov.on.ca

The reports are based on a number of questions asked in the Ministry of Tourism's Travel Intentions Survey.

Accommodations: Hotel Occupancy and Average Daily Rates Up in First Half of 2005

- For the period January to June 2005, occupancy at Ontario hotels grew 1.3 percentage points over the same period in 2004 to 58.7%.
- Over the same period, the average daily room rate (ADR) at Ontario hotels increased by 3.3% to \$117.91, resulting in a 5.6% increase in Revenue Per Available Room. The ADR at Ontario hotels for the period January to June 2005 was the highest seen during this period in years.

The following table shows occupancy and average daily rates for several different markets across Ontario for the first six months of 2005.

Location	Occupancy Percentage (%)			Average Daily Rate (\$)		
	Jan-Jun 2005	Jan-Jun 2004	*Point Change	Jan-Jun 2005	Jan-Jun 2004	% Ch
ONTARIO	58.7	57.4	1.3	117.91	114.19	3.3
Greater Toronto Area (GTA)	63.9	62.0	1.9	127.96	119.15	2.9
<i>Downtown Toronto</i>	65.9	65.4	0.5	152.39	148.83	2.4
<i>Toronto Airport</i>	70.7	70.3	0.4	115.34	112.01	3.0
<i>GTA West</i>	59.8	58.5	1.3	103.49	101.78	1.7
<i>GTA East/North</i>	58.1	53.5	4.7	109.30	104.90	4.2
Eastern Ontario	52.7	50.9	1.8	96.69	91.00	5.1
<i>Kingston</i>	57.1	54.5	2.6	105.92	100.15	5.8
<i>Other Eastern Ontario</i>	50.2	49.1	1.2	89.14	85.60	4.1
Ottawa	63.7	61.9	1.8	126.59	122.07	3.7
<i>Downtown Ottawa</i>	66.6	64.8	1.8	134.09	129.72	3.4
<i>Ottawa West</i>	56.9	53.2	3.8	112.25	108.63	3.3
<i>Ottawa East</i>	56.2	58.6	-2.4	93.46	90.07	3.8
Southern Ontario	50.1	50.7	-0.6	104.51	101.53	2.9
<i>London</i>	62.2	61.7	0.5	99.83	96.33	3.6
<i>Windsor</i>	51.7	55.6	-3.9	101.61	102.51	-0.9
<i>K/W/Cambridge/Guelph</i>	59.0	58.0	1.0	95.80	93.31	2.7
<i>Hamilton/Brantford</i>	58.0	52.6	5.5	95.11	90.98	4.5
<i>Niagara Falls</i>	44.9	46.0	-1.2	119.86	116.05	3.3
<i>Other Niagara Falls Region</i>	39.8	40.7	-0.9	85.65	84.19	1.7
<i>Other Southern Ontario</i>	42.2	44.6	-2.4	95.09	90.95	4.5
Central Ontario	47.4	45.4	1.9	119.12	115.57	3.1
North Eastern Ontario	61.8	59.9	2.0	81.93	79.34	3.3
<i>North Bay</i>	61.1	55.9	5.1	86.40	82.98	4.1
<i>Sudbury</i>	62.1	59.7	2.4	85.64	84.79	1.0
North Central Ontario						
<i>Sault Ste. Marie</i>	50.9	48.5	2.4	82.44	83.30	-1.0
North Western Ontario	62.7	62.5	0.2	85.37	87.62	-2.6

Source: Trends in the Canadian Hotel Industry, PKF Consulting. *percentage point change
Data based on Pannell Kerr Forster's unweighted sample, which tends to be branded properties of 30 rooms or more.

Upcoming Conferences and Workshops

The Ontario Tourism Marketing Partnership Corporation will hold its first ever Ontario Tourism Marketing Summit on October 19 and 20, 2005 at the Niagara Fallsview Casino Resort. The event will feature guest speakers, best practice discussions and an awards ceremony celebrating those in the Ontario tourism industry who have demonstrated excellence and innovation in marketing. Visit www.ontariotourismsummit.com for details or call 1-888-451-0939 to register.

The Northern Ontario Tourist Outfitters Association's (NOTO) Annual General Meeting will take place November 2-5, 2005 in Sault Ste. Marie. For more information, please contact laurie@noto.net

The Northern Ontario Native Tourism Association's (NONTA) Annual General Meeting will be held November 2, 2005 in Sault Ste. Marie. For more information, please contact Peggy Wassegijig at (807) 623-0497 or peggy@nonta.net

Canada's Restaurant and Foodservices Association will hold its annual 'HostEx' conference and trade show October 16-18, 2005 at the Toronto International Centre. Please visit www.crfa.ca for more information.

Canada's National Parks and Recreation Association's annual conference and trade show will be held October 12-15, 2005 in Edmonton. Please visit www.cpra.ca for more information.

The Federation of Ontario Bed and Breakfast Accommodation (FOBBA) Annual General Meeting will be held on November 8 and 9, 2005 in Sudbury. For more information, please visit the web site, www.fobba.com, or contact Stan & Janet Fenton at 888-613-8582.

The Ontario Motorcoach Association will hold their Annual Marketplace & Conference October 23-26, 2005 at The Sheraton Centre Toronto Hotel. Please visit www.omca.com for more information.

The Canadian Tourism Human Resource Council will be holding their 5th Annual Tourism HR Forum November 4-5, 2005 in Halifax. Please visit www.cthrc.ca for more information.

Special Topics: Tourism in the St. Lawrence River Corridor

This article is the sixth in a series that highlights a tourism region in Ontario and it provides a profile of visitors to the St. Lawrence River Corridor, which includes Prince Edward County and the southern portions of Northumberland, Hastings, Lennox & Addington, Frontenac, Leeds & Grenville, and Stormont, Dundas & Glengarry Counties.

In 2003, the St. Lawrence River Corridor received 6.3 million visitors, which represents a 22% decrease over 2002 and a 15% decrease over 2001. Ontario as a whole received 114.9 million person visits in 2003; a 12% decrease over 2002 and a 9% decrease over 2001. The St. Lawrence River Corridor received 5% of the total person visits to the province in 2003.

Of the 6.3 million visitors to the St. Lawrence River Corridor, 82% were Canadians (of which 91% were Ontario residents travelling to or within the region), 16% were Americans and 2% were from overseas countries. Most (58%) of the visitors to the region did not spend any nights there in 2003.

Of the 5.1 million Canadian visitors, 42% stayed in the region for one or more nights. Of the 1 million visitors from the U.S.A. to the St. Lawrence River Corridor, 37% stayed overnight, and of the 109,000 visitors from overseas, 81% stayed overnight.

These visitors spent \$593.2 million in the region in 2003 or an average of \$94 per person visit.

The largest portion (41%) of visitors travelled to the St. Lawrence River Corridor primarily for a pleasure trip compared to 42% of the total visitors to Ontario. Visiting friends and/or relatives was the primary reason for travelling to the St. Lawrence River Corridor for 36% of visitors in 2003 compared to 34% for Ontario as a whole. Business was the primary reason for visiting the St. Lawrence River Corridor for 8% of the total visitors to the area compared to 9% for Ontario as a whole.

In 2003, the top activities for visitors to the area were visiting friends and/or relatives (49%), shopping (41%), participating in sports or outdoor activities (25%) and sightseeing (24%).

Overnight visitors from overseas countries stayed in the region for an average of 4.6 nights, while Americans stayed for an average of 4.1 nights and domestic visitors for an average of 2.5 nights.

Useful Web Sites

Ontario Ministry of Tourism, Tourism Research – www.research.tourism.gov.on.ca

Ontario Ministry of Tourism – www.tourism.gov.on.ca

Ontario Tourism Marketing Partnership Corporation – www.tourismpartners.com

Canadian Tourism Commission – www.canadatourism.com

Statistics Canada – www.statcan.ca

TTRA Canada – www.ttracanada.ca

TTRA International – www.ttra.com

Tourism Research Links – www.waksberg.com

World Tourism Organization – www.world-tourism.org

US Department of Commerce, Tourism Industries – tinet.ita.doc.gov

Ontario Tourism Education Corporation – www.otec.org

Travel Industry Association of Canada – www.tiac-aitc.ca

Overseas Market Continued to Perform Well

- For the period January to July 2005, overseas entries to Ontario grew 12% over the same period in 2004 to the highest level seen from this market since 2001. Increases over this period in 2004 were seen from each of Ontario's primary overseas markets: the U.K. (+5%), Germany (+10%), France (+12%), and Japan (+30%).

Travel Price Index

Price of Travel in Ontario Increased in August over Last August

- In August 2005, Ontario's Travel Price Index (TPI) increased by 2% over August 2004. Compared to last August, the prices of all major items increased with the exception of "Travellers' Accommodation" (-8%) and "Clothing & Footwear" (-3%).
- In comparison, Ontario's Consumer Price Index (CPI) increased by 3% over August 2004.

Source: Statistics Canada; Ontario Ministry of Tourism

Ontario Travel Information Centres (TICs)

Visits to Ontario's TICs Declined in First Seven Months of 2005

- For the period January to July 2005, visits to Ontario's Travel Information Centres (TICs) decreased 13% over the same period in 2004.

Source: Ontario Ministry of Tourism



Visit our website www.research.tourism.gov.on.ca for information on the industry's current performance, historical statistics, provincial forecasts, market reports and much more.

Questions? Suggestions?

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Ontario Tourism Facts & Figures - Feedback Form

Please take a minute of your time to help us serve you better by completing this survey. For your convenience, the postage is prepaid. Please return this survey to the Ontario Ministry of Tourism by October 31, 2005.

1. Which of the following sectors best describes your business? (check ☒ one)					
Accommodation	1 ☐	Tourism/trade association	5 ☐		
Food and beverage	2 ☐	Education	6 ☐		
Provincial/Federal government	3 ☐	Amusement and recreation	7 ☐		
Municipal government	4 ☐	Other	8 ☐		
2. Please tell us whether or not you agree or disagree with the following statements about the Ontario Tourism Facts & Figures publication.					
	Strongly Agree	Agree	Neither Agree Nor Disagree	Disagree	Disagree Strongly
The publication is useful for my work.	1 ☐	2 ☐	3 ☐	4 ☐	5 ☐
The publication is interesting to read.	1 ☐	2 ☐	3 ☐	4 ☐	5 ☐
3. In which format would you most prefer to receive the Ontario Tourism Facts & Figures publication? (check ☒ one)					
Paper (by land-mail)	1 ☐	Electronic (by e-mail)	2 ☐		
4. Do you have access to the Internet? (check ☒ one)					
	Yes	1 ☐	No	2 ☐	

Thank you!

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