

Ontario Tourism Facts & Figures

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International Travel Account

Ontario's travel deficit reached \$1.3 billion in Q4 2008, a decrease of 17% over the travel deficit recorded in Q4 2007. Ontarians spent \$2.8 billion outside of Canada, a decrease of 4.2% over 2007, while travellers from the U.S. and overseas spent \$1.5 billion in Ontario, an increase of 9.8% over 2007.

- **Ontario's travel deficit with the U.S. was \$800 million**, down 27.0% from a deficit of \$1.1 billion in Q4 2007. Ontarians spent \$1.5 billion in the U.S., 13.8% less than in Q4 2007, while U.S. travellers spent \$700 million in Ontario, or 10.4% more than in the same quarter of the previous year.
- **Ontario's travel balance with overseas countries was \$420 million**, up 15.3% from Q4 2007. Ontarians spent \$1.2 billion in overseas countries, 11.2% more than in Q4 2007, while overseas travellers spent \$800 million in Ontario, 9.3% more than in the same quarter of the previous year.

Canada's travel deficit reached \$2.8 billion in the fourth quarter of 2008, down 18% from a deficit of \$3.4 billion in Q4 2007.

Source: Statistics Canada, Ontario Ministry of Tourism

Economic Outlook

Economic Indicators Canada & Ontario

		2008	2009*	2010*
Real Gross Domestic Product** % change over previous year	ON	-0.1	-1.1	3.6
	Can	0.7	-0.5	3.5
Consumer Price Index % change over previous year	ON	2.3	0.6	2.3
	Can	2.5	0.7	2.4
Unemployment Rate (%)	ON	6.5	8.0	8.0
	Can	6.1	7.6	7.6
Personal Disposable Income % change over previous year	ON	5.5	1.7	3.5
	Can	5.9	2.2	3.5

*Forecast data

**GDP at basic prices (constant\$ 2002)

Source: Conference Board of Canada, Key Economic Indicators, Winter 2009

Tourism Statistics

International Border Crossings

U.S. visits to Ontario declined 13% in 2008 compared to 2007

For the year 2008, there were about 13.1 million border crossings from the U.S. to Ontario – a decrease of 12.6% over 2007.

- The decline in same-day visits was larger than the decline in overnight visits. In 2008, same-day trips to Ontario decreased 18.2% or 1.5 million fewer crossings compared to 2007.
- Overnight visits by U.S. residents to Ontario dropped 5.6% or 375,000 fewer crossings in 2008 versus 2007.

The overseas market grew slightly in 2008

In 2008, there were 1.8 million overseas entries into Ontario, an increase of 0.8% over 2007. Overseas entries increased every month for the first 8 months of 2008 and then declined in the last 4 months versus 2007.

- Direct entries to Ontario were up by 2.1%, while entries via the U.S. were down by 4.1%.
- Over the course of 2008, arrivals from traditional markets of France and Germany rose 5.2% and 3.9%, respectively, while arrivals from the U.K. and Japan fell 9.7% and 16.5% compared to 2007.
- Arrivals were up in 2008 from a number of emerging markets, including Brazil (+6.4%), India (+5.7%), Mexico (+3.1%), and Australia (+2.9%).

International Border Crossings into Ontario, % Change versus 2007

	2008	Q1 2008	Q2 2008	Q3 2008	Q4 2008
Total U.S. (%)	-12.6	-14.8	-14.9	-12.8	-7.2
Same Day (%)	-18.3	-22.3	-21.5	-18.7	-9.6
Overnight (%)	-5.3	+0.2	-6.7	-6.9	-3.9
Total Overseas (%)	+0.8	+2.0	+6.6	+0.8	+7.7

Source: Statistics Canada

Accommodations

In 2008, occupancy rates averaged **61.4%**, down one percentage point over 2007 while the Average Daily Rates (ADR) of **\$127.15** were up **0.6%** compared to 2007

- On a monthly basis throughout 2008, occupancy was lowest in December at 44.1% and highest in August at 73.9%. Niagara Falls posted both the highest and lowest monthly occupancy rate at 91.1% in August and 26.4% in January.
- The lowest monthly ADR in 2008 of \$117.02 was observed in December while September recorded the highest ADR at \$137.24. Downtown locations achieve the highest ADRs with downtown Toronto reporting an ADR of \$167.09 in 2008.

Useful Websites

Ontario Ministry of Tourism, Research Unit
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.canada.travel

Statistics Canada
www.statcan.ca

Travel and Tourism Research Association (TTRA) Canada
www.ttracanada.ca

Travel and Tourism Research Association (TTRA) International
www.ttra.com

World Tourism Organization
www.world-tourism.org

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

Travel Industry Association of America (TIA)
www.tia.org

Ontario Tourism Education Corporation
www.otec.org

Tourism Industry Association of Canada
www.tiac.travel

Ontario Hotel Occupancy and Average Daily Rates January to December

	Occupancy Percentage (%)			Average Daily Rate (\$)		
	2008	2007	Point change	2008	2007	% Change
Ontario	61.4%	62.5%	-1.0	\$ 127.15	\$ 126.39	0.6%
Greater Toronto Area (GTA)	66.0%	66.7%	-0.7	\$ 136.48	\$ 135.67	0.6%
Downtown Toronto	71.7%	70.9%	0.8	\$ 167.09	\$ 168.06	-0.6%
Toronto Airport	65.6%	69.4%	-3.8	\$ 120.00	\$ 117.76	1.9%
GTA West	61.2%	62.8%	-1.6	\$ 107.82	\$ 106.22	1.5%
GTA East/North	60.8%	60.9%	-0.1	\$ 114.45	\$ 114.42	0.0%
Eastern Ontario	57.0%	58.0%	-0.9	\$ 106.72	\$ 104.95	1.7%
Kingston	62.2%	62.3%	-0.1	\$ 121.07	\$ 118.31	2.3%
Other Eastern Ontario	54.7%	56.0%	-1.3	\$ 99.36	\$ 98.16	1.2%
Ottawa	70.5%	70.2%	0.3	\$ 136.21	\$ 133.52	2.0%
Downtown Ottawa	71.9%	71.0%	0.9	\$ 142.84	\$ 140.67	1.5%
Ottawa West	67.2%	69.9%	-2.7	\$ 126.86	\$ 121.06	4.8%
Ottawa East	65.8%	64.8%	1.0	\$ 100.42	\$ 100.62	-0.2%
Southern Ontario	52.5%	55.8%	-3.3	\$ 117.08	\$ 117.69	-0.5%
London	54.8%	60.4%	-5.6	\$ 102.07	\$ 101.00	1.1%
Windsor	46.6%	50.9%	-4.4	\$ 100.45	\$ 99.08	1.4%
K/W/Cambridge/Guelph	50.8%	57.7%	-7.0	\$ 105.37	\$ 103.83	1.5%
Hamilton/Brantford	59.0%	64.8%	-5.8	\$ 107.03	\$ 105.47	1.5%
Niagara Falls	55.2%	57.1%	-1.9	\$ 139.97	\$ 143.04	-2.1%
Other Niagara Falls Region	45.6%	48.0%	-2.3	\$ 95.31	\$ 95.72	-0.4%
Other Southern Ontario	47.6%	47.2%	0.4	\$ 100.65	\$ 100.80	-0.2%
Central Ontario	50.6%	49.2%	1.4	\$ 127.21	\$ 131.15	-3.0%
North Eastern Ontario	65.7%	66.0%	-0.3	\$ 99.42	\$ 94.14	5.6%
North Bay	65.4%	65.9%	-0.6	\$ 101.47	\$ 94.93	6.9%
Sudbury	70.1%	70.3%	-0.1	\$ 106.04	\$ 100.79	5.2%
North Western Ontario	68.0%	66.5%	1.5	\$ 95.06	\$ 92.92	2.3%
Thunder Bay	69.1%	67.2%	2.0	\$ 95.89	\$ 94.59	1.4%
Sault Ste. Marie	52.0%	51.9%	0.1	\$ 90.71	\$ 88.92	2.0%

Source: Trends in the Canadian Hotel Industry, PKF Consulting.

What's New in the Ministry Research Unit?

New Research and Publications

www.research.tourism.gov.on.ca

We have introduced a new **subscriber system** to ensure that Ontario's tourism stakeholders receive the research publications which are of interest to them. **Existing recipients** of research publications were sent an email to complete their profile, select a password and to confirm their preferences while **new subscribers** are invited to register at www.research.tourism.gov.on.ca. This is a free service.

Subscribers can then update their profile information and preferences at any time.

- Results from the **Travel Survey of the Residents of Canada (TSRC)** for 2007, including tables on visitation, purpose of trip, accommodation, activities and spending by domestic visitors, are available at **Reports > Canadian and International Travel Surveys**, see **Ontario's Domestic Travel Markets**.
- The **Tourism Outlook** has been updated to 2012. This forecast includes annual growth rates for visits and spending. See **Tourism Research > Tourism Outlook**
- 2007 Regional Tourism Profiles** are now available. They have taken on a new format, providing more detailed information across a number of categories. Please note the 2007 profiles cannot be compared to those of previous years due to methodological changes in the new Travel Survey of the Residents of Canada (TSRC). You can access them from **Tools > Regional Tourism Profiles**.

Special Topics: Economic Impact of Tourism in Ontario

There were more than 100 million visits in Ontario in 2007, up 1.4% from 2006. Visitor spending was over \$17 billion (unchanged from 2006) while Ontario's tourism receipts reached \$22 billion (up 0.7% compared to 2006)

- Total Gross Domestic Product (GDP) generated by tourism-related spending amounted to \$19.9 billion or 3.4% of Ontario's GDP.
- Total tax revenues from tourism for all levels of government reached \$10.6 billion.
- The total employment impact reached almost 312,000 jobs, or 4.7% of Ontario's total employment, of which 200,000 were in the tourism-related industries.
- Ontario's tourism industry is extremely diverse, encompassing 152,000 businesses, representing 17% of the total number of businesses in the province.
- Ontarians spent \$25.2 billion on tourism world-wide which represents 7.5% of total personal spending and 7.1% of personal disposable income

	2006 (\$)	2007 (\$)	Change (%)
Total Tourism Receipts	22,962,356	22,130,173	-3.6
Gross Domestic Product			
Direct (Tourism)	11,255,516	11,327,450	0.6
Indirect	4,290,308	4,321,378	0.7
Induced	4,147,990	4,302,255	3.7
Total	19,693,814	19,951,083	1.3
Taxes			
Direct (Tourism)	6,322,880	6,378,333	0.9
Indirect	2,264,587	2,290,934	1.2
Induced	1,838,791	1,921,760	4.5
Total	10,426,258	10,591,027	1.6
Federal	5,481,841	5,558,782	1.4
Provincial	4,015,220	4,085,200	1.7
Municipal	929,197	947,046	1.9
Employment	Number of Jobs		
Direct (Tourism)	204,128	200,243	-1.9
Indirect	59,272	58,003	-2.1
Induced	52,883	53,433	1.0
Total	316,282	311,680	-1.5

Upcoming Conferences & Events



- **Tourism Week 2009** will take place June 1–7, 2009. This is an annual, country-wide celebration that aims to increase the profile of Canada's tourism industry and convey the value of the tourism industry to Canada's local, provincial, territorial and national economies and to the quality of life of all Canadians. Coordinated by the Tourism Industry Association of Canada (TIAC), Tourism Week provides a focal point for activities organized across the country by provincial and territorial tourism industry associations, destination marketing organizations, visitor and convention bureaus, individual businesses and other organizations, in order to raise awareness of tourism and its benefits.
- The 2009 Travel and Tourism Research Association International Conference **Catch the Wave: Tourism Research!** will be held June 21 – 24, 2009 in Honolulu, Hawaii. Details are available at www.ttra.com.
- The 2009 Travel and Tourism Research Association (TTRA) Canada Chapter Conference **Away from the Mainstream – Niche tourism in urban fringes, rural roads, cultural quarters and emerging destinations** will be held in Guelph, Ontario from October 14 – 16, 2009. The conference will be preceded with a Student Symposium on October 13, and followed with a Parks Canada workshop on October 17. Please visit www.ttracanada.ca for more information.
- The Ontario Tourism Marketing Partnership Corporation (OTMPC) and the Tourism Industry Association of Ontario (TIAO) are once again co-hosting the **Ontario Tourism Summit**. The conference will be held September 29 – October 1, 2009 at the Caesars Windsor in Windsor, Ontario. Details will be posted at www.tourismpartners.com as they become available.
- The 2009 edition of **Canada's Tourism Leadership Summit**, hosted by the Tourism Industry Association of Canada (TIAC) will be held from November 2 – 4, 2009 in Saint John, New Brunswick. Visit www.tiac.travel for more information.
- The Canadian Tourism Human Resource Council (CTHRC) is developing an exciting program for its 8th annual **Tourism HR Forum** which is taking place November 2009 in Montreal, Quebec. Details will be posted on www.cthrc.ca/hrforum as they become available.

Travel Price Index

The price of travel in Ontario increased 10.5% in 2008

- Ontario's Travel Price Index (TPI) was up by an average of 10.5% in 2008 compared to 2007. Increases in the cost of auto operation, local and inter-city transportation, food and beverage, and accommodations were the sources of the increase. These were partially offset by declines in the cost of auto rentals and retail.
- In 2008, the growth of Ontario's TPI at 10.5% outpaced that of Ontario's Consumer Price Index (CPI) which grew 2.3% over 2007.

Source: Statistics Canada; Ontario Ministry of Tourism

Visitor Inquiries

User sessions at OntarioTravel.net increased in 2008, while both call volume at 1-800-Ontario and visits to Ontario's Travel Information Centres were down

- There were approximately 3 million user sessions at www.OntarioTravel.net in 2008, an increase of 11% over 2007.
- Calls to the 1-800-ONTARIO Call Centre totalled about 147,000 over 2008, a decrease of 20% over 2007.
- In 2008, there were approximately 1 million visits to Ontario's Travel Information Centres (TICs), 18% fewer than in 2007.

Source: Ontario Tourism Marketing Partnership Corp. (OTMPC)

Source: Electronic Data Systems

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 more.

Questions? Suggestions?

Please contact the Research Unit at (416) 325-6057 or by email at tourism.research@ontario.ca

Join our distribution list to receive publications and notification of events, presentations, data releases and studies.

www.research.tourism.gov.on.ca

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