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Winter 2009 | Vol. 8, No. 4

Economic Outlook

Economic Indicators Canada and Ontario

		2009	2010*	2011*
Real Gross Domestic Product** % change over previous year	ON	-3.6	3.5	3.7
	Can	-3.1	2.8	3.3
Retail Sales % change over previous year	ON	-2.8	4.6	6.0
	Can	-3.5	3.8	5.2
Unemployment Rate (%)	ON	9.1	9.3	8.3
	Can	8.3	8.6	7.8
Personal Disposable Income % change over previous year	ON	1.0	3.3	4.3
	Can	1.8	3.1	4.0

*Forecast data.

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

Source: Conference Board of Canada, Key Economic Indicators, Winter 2010

Tourism Statistics International Border Crossings



U.S. border crossings to Ontario declined 16% in Q4 2009 and decreased 12% in calendar year 2009.

During October to December 2009, there were 2.3 million border crossings from the U.S. to Ontario, a decrease of 15.7% versus 2008.

- In Q4 2009, U.S. same day crossings, which represented 53% of crossings to Ontario, decreased 19.6% or by 292,000 crossings, while crossings for overnight trips dropped 10.8% or 128,000 fewer crossings compared to Q4 2008.

For the 12 months ending December 2009, there were 11.5 million border crossings from the U.S. to Ontario, a decrease of 12.1% versus Jan-Dec 2008. U.S. crossings declined 3.7% in Q1 2009, 9.1% in Q2 2009 and 15.9% in Q3 2009.

As of June 1, 2009 the Western Hemisphere Travel Initiative required all persons, including U.S. residents, to have a passport, a NEXUS card, or an enhanced driver's license in order to enter or re-enter the U.S.

Overseas crossings to Ontario decreased 8% in Q4 2009 and 14% in 2009.

In Q4 2009, there were 313,000 overseas entries into Ontario, a decline of 8.4% over Q4 2008.

- During 2009 arrivals from all traditional overseas markets declined compared to 2008. U.K. arrivals declined 17.0%, German arrivals were down 6.9%, arrivals from France dropped 3.4% and Japanese arrivals fell 25.8%.

International Border Crossings into Ontario, % Change versus year ago

	Q1 2009	Q2 2009	Q3 2009	Q4 2009	Jan-Dec 2009
Total U.S. (%)	-3.7%	-9.1%	-15.9%	-15.7	-12.1%
Same Day (%)	-2.2%	-13.0%	-24.4%	-19.6	-16.1%
Overnight (%)	-5.9%	-5.1%	-8.5%	-10.8	-7.7%
Total Overseas (%)	-10.9%	-15.8%	-15.3%	-8.4	-13.6%

Source: Statistics Canada

Special Topic: Travellers Use of Social Media



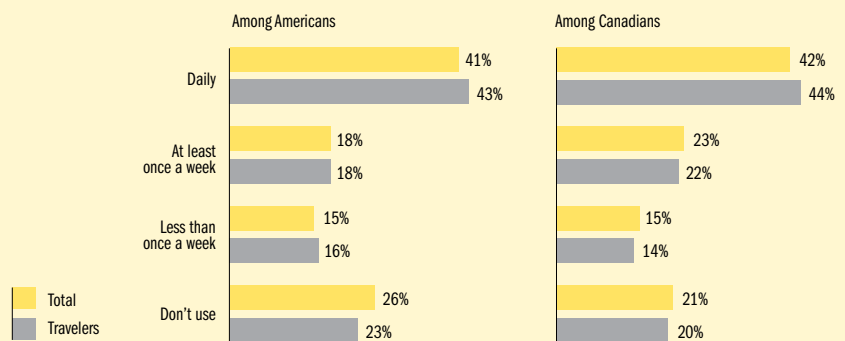
The majority of travellers are using some form of Social Media not only to gather information but also to share information and these sites have a significant influence on travel decisions.

Social Networking sites such as Facebook, My Space, Tripadvisor, Twitter, YouTube, etc. are increasing in popularity and usage. The Ministry of Tourism and Culture's Research Unit added several Social Networking questions to the recent Travel Intentions Study to understand how and how much Social Networking impacts travellers' decisions.

77% of American travellers and 80% of Canadian travellers use Social Networking

- With 43% of Americans and 44% of Canadians reporting they visit Social Networking sites on a daily basis.
- Incidence of daily Social Media usage is slightly higher among travellers than total population.

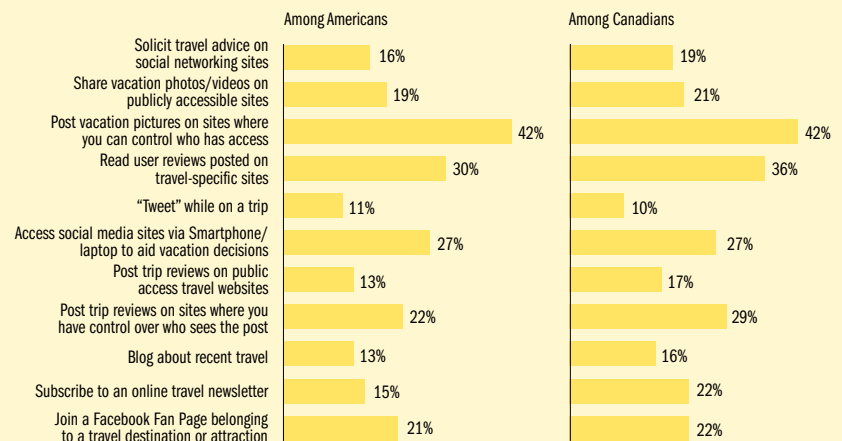
Frequency of Social Networking



Travellers use Social Networking sites not only to gain information but also to share information with other users

- Over 40% of social networking users have posted vacation pictures and 20-30% have posted a trip review.
- Over 30% have read reviews, 27% used social media to make vacation decisions and 22% joined a Facebook Fan Page.

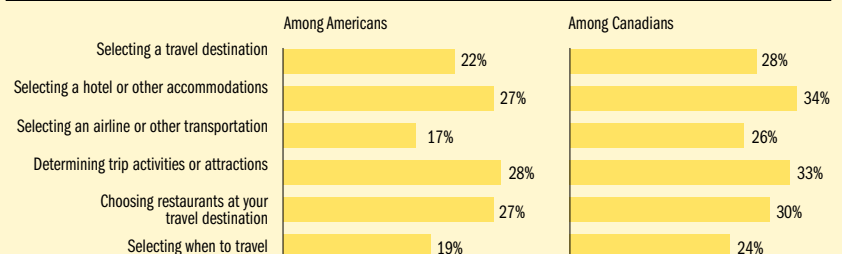
Likelihood (Likely/Very Likely)



Social Media influences many decisions related to travel

- Over 30% of Canadian social networking users indicate that social media has an impact on their choice of accommodation, activities, attractions and restaurants.
- Selecting a destination, transportation and when to travel are also influenced by social networks.

Influence (Influential/Very Influential)



International Travel Account



Ontario's travel deficit was \$9.0 billion in 2009, an increase of 1.0% from 2008. Ontarians spent \$14.5 billion outside of Canada, a decrease of 4.3%, while travellers from the U.S. and overseas countries spent \$5.5 billion in Ontario, a decline of 12.0%.

- **Ontario's travel deficit with the U.S. was \$4.8 billion**, down 14.2% compared to 2008. Ontarians spent \$7.8 billion in the U.S., 12.0% less than in 2008, while U.S. travellers spent \$3.0 billion in Ontario, a decrease of 8.2% versus a year ago.
- **Ontario's travel deficit with overseas countries was \$4.2 billion**, up 26.5% from 2008. Ontarians spent \$6.7 billion in overseas countries, an increase of 6.6% over 2008, while overseas travellers spent \$2.4 billion in Ontario, a decline of 16.4%.

Canada's travel deficit was \$11.3 billion in 2009, down 9.8% from 2008.

Source: Statistics Canada, Ontario Ministry of Tourism and Culture



Accommodations

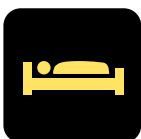
Both Occupancy Rates and Average Daily Rates declined in 2009

- During 2009, occupancy rates averaged 57.1%, down 4.4 percentage points over 2008.
- The average daily rate dropped 5.9% to \$119.36 in 2009.
- Revenue per available room in 2009 decreased by 12.6%, compared to 2008, to \$68.13.

Ontario Hotel Occupancy and Average Daily Rates Jan. to Dec. 2009

	Occupancy Percentage (%)			Average Daily Rate (\$)		
	Jan-Dec 2009	Jan-Dec 2008	Point change	Jan-Dec 2009	Jan-Dec 2008	% Change
ONTARIO	57.1%	61.4%	-4.4	\$119.36	\$126.80	-5.9%
Greater Toronto Area (GTA)	60.8%	66.1%	-5.4	\$123.74	\$135.91	-9.0%
Downtown Toronto	68.0%	71.7%	-3.7	\$146.98	\$166.96	-12.0%
Toronto Airport	58.5%	66.1%	-7.6	\$109.69	\$118.42	-7.4%
GTA West	55.7%	61.8%	-6.1	\$103.32	\$108.53	-4.8%
GTA East/North	55.6%	60.9%	-5.2	\$107.95	\$114.84	-6.0%
Eastern Ontario	51.9%	56.4%	-4.5	\$106.10	\$106.87	-0.7%
Kingston	59.2%	62.4%	-3.2	\$119.12	\$120.84	-1.4%
Other Eastern Ontario	49.0%	54.2%	-5.2	\$99.82	\$100.83	-1.0%
Ottawa	65.6%	70.3%	-4.7	\$133.21	\$136.07	-2.1%
Downtown Ottawa	68.4%	72.0%	-3.6	\$138.40	\$142.57	-2.9%
Ottawa West	57.4%	65.6%	-8.2	\$126.81	\$127.30	0.4%
Ottawa East	61.1%	65.8%	-4.7	\$102.94	\$100.55	2.4%
SOUTHERN ONTARIO	49.4%	52.7%	-3.3	\$114.02	\$117.44	-2.9%
London	51.2%	54.8%	-3.6	\$98.09	\$101.66	-3.5%
Windsor	40.6%	46.1%	-5.5	\$99.67	\$100.41	0.7%
K/W/Cambridge/Guelph	46.6%	52.2%	-5.5	\$104.229	\$107.85	-3.3%
Hamilton/Brantford	52.5%	58.5%	-6.0	\$104.07	\$107.24	-3.0%
Niagara Falls	54.8%	55.5%	-0.7	\$132.29	\$139.12	-4.9%
Other Niagara Falls Region	42.3%	45.6%	-3.3	\$95.68	\$96.53	-0.9%
Other Southern Ontario	41.7%	47.4%	-5.7	\$103.96	\$101.67	2.3%
Central Ontario	46.7%	50.9%	-4.2	\$118.04	\$126.85	-6.9%
North Eastern Ontario	62.1%	65.8%	-3.6	\$100.35	\$99.42	0.9%
North Bay	64.2%	65.6%	-1.4	\$101.08	\$101.50	-0.4%
Sudbury	62.3%	70.0%	-7.7	\$107.01	\$106.24	0.7%
North Western Ontario	65.5%	67.5%	-2.0	\$96.56	\$95.79	0.8%
Thunder Bay	65.4%	68.6%	-3.2	\$96.63	\$96.31	0.3%
Sault Ste. Marie	54.3%	52.3%	2.0	\$93.28	\$90.86	2.7%

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



Visitor Inquiries



User sessions at OntarioTravel.net increased while visits to Ontario's Travel Information Centres and call volume to 1-800-Ontario declined

- During 2009, there were approximately 3.3 million user sessions at www.OntarioTravel.net, up 9.1% over 2008.

Source: Ontario Tourism Marketing Partnership Corp. (OTMPC)

- In 2009, there were approximately 996,000 visits to Ontario's Travel Information Centres (TICs), 2.5% less than in 2008.

Source: Ontario Tourism Marketing Partnership Corp. (OTMPC)

- Calls to the 1-800-ONTARIO Call Centre totalled about 123,000 throughout 2009, a decrease of 16.2% over 2008.

Source: Electronic Data Systems

Tourism-Related Employment



Employment in tourism related industries decreased 1.3% in 2009

- Employment in Air Transportation, Performing Arts and Amusement/Recreation industries grew in 2009 compared to 2008, however this growth was offset by declines in employment in Accommodation and Travel Arrangement services and Heritage Institutions.
- Ontario's tourism related employment declined 1.3% in 2009 while total employment in Ontario declined 2.4% over the same time period.

Source: Statistics Canada; Ontario Ministry of Tourism and Culture

Travel Price Index



Price of travel in Ontario increased 0.7% during 2009

- Ontario's Travel Price Index (TPI) was up by an average of 0.7% in 2009 compared to 2008. Increases in the cost of local transportation, food and beverage, and recreational services were the sources of the growth while the cost of operating a vehicle and accommodations declined.
- The increase in Ontario's TPI was almost double the increase in Ontario's Consumer Price Index (CPI). During 2009, Ontario's CPI grew 0.4% over 2008 while Ontario's TPI increased 0.7%.

Source: Statistics Canada; Ontario Ministry of Tourism and Culture

Upcoming Conferences & Events



• 2010 MRIA Conference & 50th Anniversary Celebration

In 2010, the association will turn 50 years young. To help celebrate this milestone, you have an opportunity to participate in what will undoubtedly be the biggest and most memorable event in the history of the market research industry in Canada. The conference will take place **May 30-June 2, 2010** at the Westin Harbour Castle in Toronto. www.mria-arim.ca

- **Tourism Week in Canada** is the national celebration that highlights the economic impact and social benefits of Canada's tourism sector among the media, general public and governments at all levels. Coordinated by the Tourism Industry Association of Canada and sponsored by Deloitte and Air Canada, Tourism Week provides a focal point for activities organized by provincial and territorial tourism industry associations, provincial and territorial marketing organizations, destination marketing organizations, individual businesses and other partners.

June 07-11, 2010.

www.tiac.travel/english/calendar.asp

- The 2010 Travel and Tourism Research Association International Conference **"Rockin' and Rollin' Down the Research River"** will be held **June 20-22** at the Grand Hyatt in San Antonio, Texas. www.ttra.com

Food Service and Drinking Places



Sales at Ontario's Restaurants & Bars grew 2.1%

- Current dollar sales for the Ontario food services and drinking places industry increased 2.1% in 2009 over 2008 to \$17.8 billion. Ontario accounted for 38% of Canada's restaurant and bar sales.
- During the same time period, sales of Canadian food service and drinking places rose 2.5%.

Source: Statistics Canada; Ontario Ministry of Tourism and Culture

What's New in the Ministry's Tourism Research?

www.research.tourism.gov.on.ca



Regional Tourism Profiles Updated

This tool provides key tourism data including Travel Statistics, Hotel Occupancy Rates, Economic Impact, and Number of Establishments by Census Division and Region. Regional Tourism Profiles can be accessed via www.tourism.gov.on.ca/english/research/rtp/index.html

GeoTravelStats Origin and Destination Module

A new module has been added to the tool GeoTravelStats which provides more detailed inbound/outbound data (to the Census Division level) and summary statistics in a user friendly map based web tool. GeoTravelStats can be found at www.tourism.gov.on.ca/english/research/geo/index.html

Travel Intentions Study Spring/Summer 2010

The results from the Spring/Summer 2010 Travel Intention Study were presented in person on March 30, 2010 and via a webcast on March 31, 2010. This research covers intent to travel to/within Ontario, perception of Ontario and specific destinations, barriers to travelling in Ontario, and traveller's attitudinal and behavioural trends. This wave of the study also included a section on Social Media and another on Border Crossing Requirements and Passport Ownership. The presentation is available at www.tourism.gov.on.ca/english/research/travel_intentions/index.html

Useful Websites

Ontario Ministry of Tourism and Culture, Research Unit
www.research.tourism.gov.on.ca

Ontario Ministry of Tourism and Culture
www.tourism.gov.on.ca

Ontario Tourism Marketing
Partnership Corporation
www.tourismpartners.com

Canadian Tourism Commission
www.canada.travel

Statistics Canada
www.statcan.gc.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.worldtourism.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

Tourism Industry Association of Ontario
www.tiao.travel



We know.
Just ask.

Ontario Tourism **Facts & Figures**

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?



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© Queen's Printer for Ontario, 2010
Published by the Ministry of Tourism and Culture
Tourism Policy and Research Branch
900 Bay, 10th Floor, Hearst Block
Toronto, ON M7A 2E1

ISSN 1708-2374 (print)
ISSN 1708-2382 (internet)

