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# Ontario Tourism Facts & Figures



Spring 2010 | Vol. 9, No. 1

## Economic Outlook

### Economic Indicators Canada and Ontario

|                                                              |     | 2009 | 2010* | 2011* |
|--------------------------------------------------------------|-----|------|-------|-------|
| Real Gross Domestic Product**<br>% change over previous year | ON  | -3.2 | 3.8   | 3.7   |
|                                                              | Can | -2.9 | 3.3   | 3.3   |
| Retail Sales<br>% change over previous year                  | ON  | -2.5 | 6.0   | 5.5   |
|                                                              | Can | -3.0 | 5.7   | 4.9   |
| Unemployment Rate (%)                                        | ON  | 9.0  | 8.6   | 7.6   |
|                                                              | Can | 8.3  | 8.0   | 7.3   |
| Personal Disposable Income<br>% change over previous year    | ON  | 0.9  | 5.2   | 4.6   |
|                                                              | Can | 1.8  | 4.5   | 4.2   |

\*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 15% in Q1 2010 and decreased 12% in calendar year 2009.

During January to March 2010, there were 1.8 million border crossings from the U.S. to Ontario, a decrease of 14.6% versus 2009.

- In Q1 2010, U.S. same day crossings, which represented 59% of crossings to Ontario, decreased 18.6% or by 236,000 crossings, while crossings for overnight trips dropped 8.3% or 66,000 fewer crossings compared to Q1 2009.

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.

### Overseas crossings to Ontario grew 4% in Q1 2010 but declined 14% in 2009.

In Q1 2010, there were 233,000 overseas entries into Ontario, an increase of 3.8% over Q1 2009.

- Arrivals from most traditional overseas markets grew with arrivals from Japan up 62%, arrivals from Germany up 6% and arrivals from France grew 1% compared to Q1 2009. Arrivals from most emerging markets also increased in Q1 2010, especially arrivals from India (+29%) and arrivals from South Korea (+12%).

### International Border Crossings into Ontario, % Change versus year ago

|                     | Q1 2010 | Jan-Dec 2009 |
|---------------------|---------|--------------|
| Total International | -12.8%  | -12.2%       |
| Total U.S.          | -14.6%  | -12.1%       |
| Same Day            | -18.6%  | -16.1%       |
| Overnight           | -8.3%   | -7.7%        |
| Total Overseas (%)  | 3.8%    | -13.6%       |

Source: Statistics Canada

# Special Topic: Social Value of Tourism



Tourism appears to result in substantial benefits for the individual, the family and the society. The Ministry of Tourism and Culture's Research Unit added several Social Value questions to the recent Travel Intentions Study to understand what the personal and social benefits of tourism are and how they are achieved.

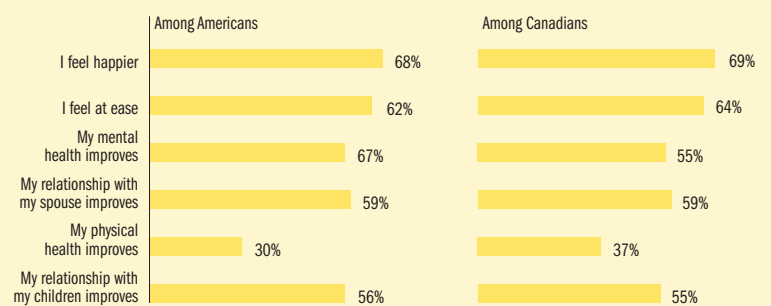
The benefits of travel are expressed with some degree of conviction and are manifest themselves during the trip as well as after the trip had ended.

## Benefits include:

- Improved mental state
- Improved health
- Better perspective on life
- Better relations with others
- Strengthened family ties through shared experience
- Rejuvenated
- Even... greater open-mindedness

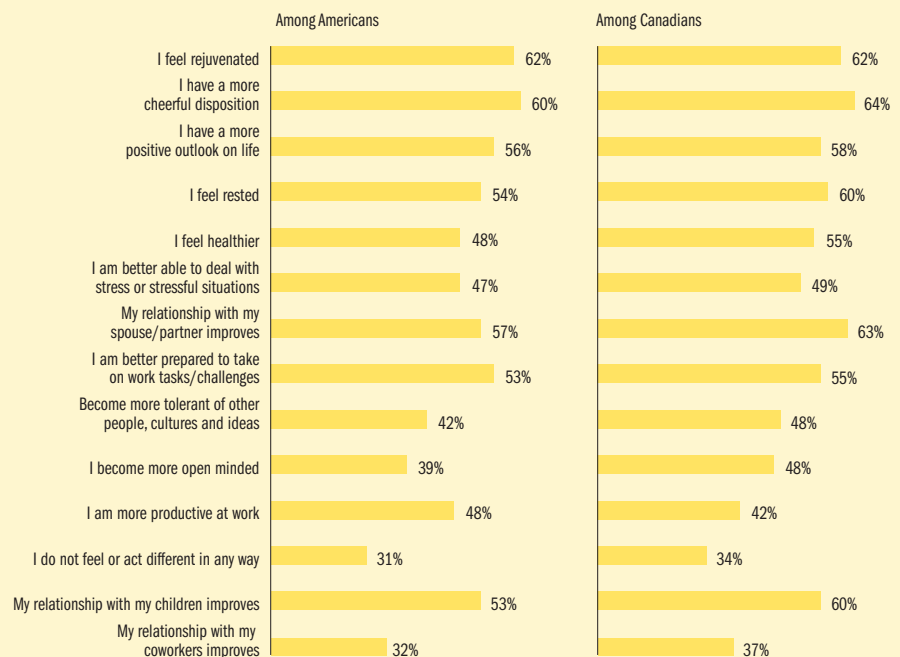
The majority of Canadians and Americans feel happier, more at ease, and experience an overall improvement in mental health during a pleasure trip. Travellers also report better family relationships and better health.

## Feelings During a Pleasure Trip (Agree/Strongly Agree)



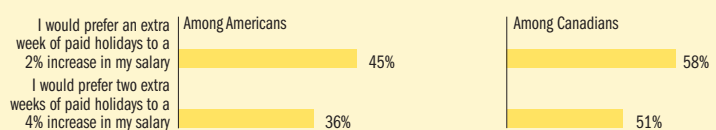
This improved mental and physical state of health continues after one comes back from a trip. Returning travellers feel they are better able to deal with stress, are more tolerant and open minded and have a more positive attitude overall.

## Feelings After a Pleasure Trip (Agree/Strongly Agree)



The personal value of travel is emphasized by the fact that a large percentage of the traveling population, especially Canadians, would trade-off a salary increase for more vacation time.

## Salary Increase vs More Vacation Time (Agree/Strongly Agree)



## International Travel Account



**Ontario's travel deficit was \$3.2 billion** in Q1 2010, a decrease of 6.3% from Q1 2009. Ontarians spent \$4.4 billion outside of Canada, a decrease of 1.4%, while travellers from the U.S. and overseas countries spent \$1.2 billion in Ontario, an increase of 14.8%.

- **Ontario's travel deficit with the U.S. was \$2.0 billion**, down 1.7% compared to 2009. Ontarians spent \$2.5 billion in the U.S., 0.4% less than in 2009, while U.S. travellers spent \$0.5 billion in Ontario, an increase of 5.6% versus a year ago.
- **Ontario's travel deficit with overseas countries was \$1.1 billion**, down 13.7% from 2009. Ontarians spent \$1.8 billion in overseas countries, a decline of 2.7% over 2009, while overseas travellers spent \$0.7 billion in Ontario, an increase of 21.7%.

**Canada's travel deficit was \$5.1 billion** in Q1 2010, up 0.8% from 2009.

Source: Statistics Canada, Ontario Ministry of Tourism and Culture



## Accommodations

**Occupancy Rates grew slightly while Average Daily Rates and Revenue per Available Room declined in Q1 2010**

- During Q1 2010, occupancy rates averaged 50.5%, up 0.6 percentage points over Q1 2009.
- The average daily rate dropped 2.5% to \$116.22.
- Revenue per available room declined 1.3% in Q1 2010 to \$58.66.

### Ontario Hotel Occupancy and Average Daily Rates Jan. to Mar. 2010

|                              | Occupancy Percentage (%) |              |              | Average Daily Rate (\$) |                 |              |
|------------------------------|--------------------------|--------------|--------------|-------------------------|-----------------|--------------|
|                              | Jan-Mar 2010             | Jan-Mar 2009 | Point change | Jan-Mar 2010            | Jan-Mar 2009    | % Change     |
| <b>ONTARIO</b>               | <b>50.5%</b>             | <b>49.9%</b> | <b>0.6</b>   | <b>\$116.22</b>         | <b>\$119.14</b> | <b>-2.5%</b> |
| Greater Toronto Area (GTA)   | 57.8%                    | 54.9%        | 2.8          | \$122.73                | \$127.30        | -3.6%        |
| Downtown Toronto             | 62.8%                    | 58.2%        | 4.6          | \$143.69                | \$145.34        | -1.1%        |
| Toronto Airport              | 63.7%                    | 60.7%        | 3.0          | \$111.13                | \$119.15        | -6.7%        |
| GTA West                     | 51.4%                    | 52.5%        | -1.1         | \$104.97                | \$108.57        | -3.3%        |
| GTA East/North               | 50.3%                    | 47.2%        | 3.0          | \$108.34                | \$116.12        | -6.7%        |
| <b>Eastern Ontario</b>       | <b>41.6%</b>             | <b>45.2%</b> | <b>-3.6</b>  | <b>\$98.92</b>          | <b>\$102.29</b> | <b>-3.3%</b> |
| Kingston                     | 43.7%                    | 54.3%        | -10.6        | \$107.87                | \$107.87        | 0.0%         |
| Other Eastern Ontario        | 40.7%                    | 41.7%        | -1.0         | \$94.79                 | \$99.50         | -4.7%        |
| <b>Ottawa</b>                | <b>59.9%</b>             | <b>62.6%</b> | <b>-2.7</b>  | <b>\$133.45</b>         | <b>\$135.03</b> | <b>-1.2%</b> |
| Downtown Ottawa              | 61.4%                    | 64.6%        | -3.3         | \$137.28                | \$138.68        | -1.0%        |
| Ottawa West                  | 57.2%                    | 55.6%        | 1.6          | \$125.94                | \$129.08        | -2.4%        |
| Ottawa East                  | 53.1%                    | 61.9%        | -8.8         | \$112.85                | \$113.80        | -0.8%        |
| <b>SOUTHERN ONTARIO</b>      | <b>38.3%</b>             | <b>38.4%</b> | <b>-0.1</b>  | <b>\$100.91</b>         | <b>\$103.53</b> | <b>-2.5%</b> |
| London                       | 48.8%                    | 49.5%        | -0.6         | \$99.02                 | \$99.16         | -0.1%        |
| Windsor                      | 35.8%                    | 38.3%        | -2.5         | \$97.17                 | \$99.79         | -2.6%        |
| K/W/Cambridge/Guelph         | 43.0%                    | 39.8%        | 3.2          | \$101.94                | \$106.77        | -4.5%        |
| Hamilton/Brantford           | 44.8%                    | 44.3%        | 0.5          | \$100.87                | \$107.10        | -5.8%        |
| Niagara Falls                | 33.2%                    | 34.8%        | -1.5         | \$104.95                | \$107.30        | -2.2%        |
| Other Niagara Falls Region   | 32.9%                    | 31.8%        | 1.1          | \$92.87                 | \$89.31         | 4.0%         |
| Other Southern Ontario       | 36.6%                    | 33.9%        | 2.7          | \$96.47                 | \$103.01        | -6.3%        |
| <b>Central Ontario</b>       | <b>37.2%</b>             | <b>38.4%</b> | <b>-1.2</b>  | <b>\$112.09</b>         | <b>\$114.84</b> | <b>-2.4%</b> |
| <b>North Eastern Ontario</b> | <b>54.0%</b>             | <b>54.0%</b> | <b>0.0</b>   | <b>\$104.69</b>         | <b>\$98.07</b>  | <b>6.7%</b>  |
| North Bay                    | 50.2%                    | 59.1%        | -8.9         | \$108.02                | \$100.29        | 7.7%         |
| Sudbury                      | 60.1%                    | 50.6%        | 9.5          | \$107.90                | \$104.42        | 3.3%         |
| <b>North Western Ontario</b> | <b>58.4%</b>             | <b>56.5%</b> | <b>1.9</b>   | <b>\$95.24</b>          | <b>\$94.24</b>  | <b>1.1%</b>  |
| Thunder Bay                  | 60.5%                    | 57.3%        | 3.1          | \$95.53                 | \$95.13         | 0.4%         |
| Sault Ste. Marie             | 46.5%                    | 43.6%        | 2.9          | \$96.51                 | \$87.45         | 10.4%        |

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



## Visitor Inquiries



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

- During Q1 2010, there were approximately 1.0 million user sessions at [www.OntarioTravel.net](http://www.OntarioTravel.net), up 51.4% over Q1 2009. The Winter Olympic campaign, Search Engine Marketing and Social Media tactics all contributed to this increase in user sessions.

*Source: Ontario Tourism Marketing Partnership Corp. (OTMPC)*

- Calls to the 1-800-ONTARIO Call Centre totalled about 30,000 throughout Q1 2010, an increase of 49.7% over Q1 2009. 1-800-ONTARIO has seen an increase in the number of Ontario Parks related calls since Ontario Parks updated their website and reservation system in late 2009.

*Source: Electronic Data Systems*

- In Q1 2010, there were approximately 93,000 visits to Ontario's Travel Information Centres (TICs), 12.7% less than in Q1 2009.

*Source: Ontario Tourism Marketing Partnership Corp. (OTMPC)*

## Travel Price Index



**Price of travel in Ontario declined 2.2% during Q1 2010**

- Ontario's Travel Price Index (TPI) was down by an average of 2.2% in Q1 2010 compared to 2009. Cost of inter-city and local transportation and accommodations declined while cost of operating a vehicle and food and beverage prices grew.
- Ontario's TPI declined while Ontario's Consumer Price Index (CPI) grew. During Q1 2010, Ontario's CPI grew 1.7% over Q1 2009.

*Source: Statistics Canada; Ontario Ministry of Tourism and Culture*

## Tourism-Related Employment



**Employment in tourism related industries increased 2.1% in Q1 2010**

- Employment in Accommodation and Food Services, Amusement/Recreation, and Travel Arrangement services grew in Q1 2010 compared to 2009, however this growth was slightly offset by declines in employment in Retail and Motion Picture industries.
- The 2.1% growth in Ontario's tourism related employment was 5 times greater than the increase in Ontario's total employment (0.4%).

*Source: Statistics Canada; Ontario Ministry of Tourism and Culture*

## Food Service and Drinking Places



**Sales at Ontario's Restaurants & Bars grew 1.7%**

- Current dollar sales for the Ontario food services and drinking places industry increased 1.7% in Q1 2010 over 2009 to \$4.5 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 3.4%.

*Source: Statistics Canada; Ontario Ministry of Tourism and Culture*

## Upcoming Conferences & Events



- The **Travel and Tourism Research Association's** annual conference will take place October 13 – 15 in Quebec City. Details are available at [www.ttracanada.ca/events/conference\\_news](http://www.ttracanada.ca/events/conference_news)
- The Ontario Tourism Marketing Partnership Corporation (OTMPC) and the Tourism Industry Association of Ontario (TIAO) are co-hosting the 6th annual **Ontario Tourism Summit**. The conference will be held November 7 – 9, 2010 at Deerhurst Resort in Huntsville, Ontario. Details are posted at [www.ontariotourismsummit.com](http://www.ontariotourismsummit.com)
- The 2010 edition of **Canada's Tourism Leadership Summit**, hosted by the Tourism Industry Association of Canada (TIAC) will be held from November 1-3, 2009 in Gatineau, Quebec. Visit [www.tiac.travel](http://www.tiac.travel) for more information.

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

[www.research.tourism.gov.on.ca](http://www.research.tourism.gov.on.ca)



## Tourism Outlook to 2014

The inbound/outbound forecast by origin and length of stay has been updated to 2014. This outlook also includes projections for key indicators such as exchange rates, GDP, CPI, etc.

The Tourism Outlook can be accessed via  
[www.tourism.gov.on.ca/english/research/forecasts/index.html](http://www.tourism.gov.on.ca/english/research/forecasts/index.html)

## Travel Intentions Study Summer/Fall 2010

The results from the Summer/Fall 2010 Travel Intention Study were presented in person on July 12, 2010 and via a webcast on July 14, 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 the social benefits of travel.

The presentation is available at  
[www.tourism.gov.on.ca/english/research/travel\\_intentions/index.html](http://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](http://www.research.tourism.gov.on.ca)

Ontario Ministry of Tourism and Culture  
[www.tourism.gov.on.ca](http://www.tourism.gov.on.ca)

Ontario Tourism Marketing  
Partnership Corporation  
[www.tourismpartners.com](http://www.tourismpartners.com)

Canadian Tourism Commission  
[www.canada.travel](http://www.canada.travel)

Statistics Canada  
[www.statcan.gc.ca](http://www.statcan.gc.ca)

Travel and Tourism Research Association (TTRA) Canada  
[www.ttracanada.ca](http://www.ttracanada.ca)

Travel and Tourism Research Association  
(TTRA) International  
[www.ttra.com](http://www.ttra.com)

World Tourism Organization  
[www.world-tourism.org](http://www.world-tourism.org)

US Department of Commerce, Tourism Industries  
[www.tinet.ita.doc.gov](http://www.tinet.ita.doc.gov)

Travel Industry Association of America (TIA)  
[www.tia.org](http://www.tia.org)

Ontario Tourism Education Corporation  
[www.otec.org](http://www.otec.org)

Tourism Industry Association of Canada  
[www.tiac.travel](http://www.tiac.travel)

Tourism Industry Association of Ontario  
[www.tiao.travel](http://www.tiao.travel)



We know.  
Just ask.

## Ontario Tourism **Facts & Figures**

### Visit our website

[www.research.tourism.gov.on.ca](http://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) 325-8287  
or by email at [tourism.research@ontario.ca](mailto:tourism.research@ontario.ca)

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