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Economic Outlook

Economic Indicators Canada and Ontario

		2009	2010*	2011*
Real Gross Domestic Product** <i>% change over previous year</i>	ON	-3.1	4.5	3.0
	Can	-2.8	3.7	2.8
Retail Sales <i>% change over previous year</i>	ON	-2.5	7.5	5.6
	Can	-2.9	7.0	4.7
Unemployment Rate (%)	ON	9.0	8.6	7.8
	Can	8.3	8.0	7.4
Personal Disposable Income <i>% change over previous year</i>	ON	0.8	4.6	5.1
	Can	1.7	3.9	4.7

*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 8% in Q2 2010 and decreased 11% in the first 6 months of 2010.

During April to June 2010, there were 2.9 million border crossings from the U.S. to Ontario, a decrease of 7.9% versus 2009.

- In Q2 2010, U.S. same day crossings, which represented 49% of crossings to Ontario, decreased 10.7% or by 164,000 crossings, while crossings for overnight trips dropped 5.2% or 84,000 fewer crossings compared to Q2 2009.

For the 6 months ending June 2010, there were 4.7 million border crossings from the U.S. to Ontario, a decrease of 10.6% versus Jan-Jun 2009.

Overseas crossings to Ontario grew 6% in Q2 2010 and increased 5% in the first half of 2010.

In Q2 2010, there were 467,000 overseas entries into Ontario, an increase of 5.5% over Q2 2009.

- During the first 6 months of 2010, arrivals from Japan grew 48% and arrivals from Germany increased 8% while arrivals from other traditional markets (U.K., France) declined compared to 2009. Arrivals from most emerging markets increased in Jan-Jun 2010, especially arrivals from India (+28%) and arrivals from South Korea (+24%) while arrivals from Mexico declined 44%.

International Border Crossings into Ontario, % Change versus year ago

	Q1 2010	Q2 2010	Jan-Jun 2010
Total International	-12.8%	-6.2%	-8.8%
Total U.S.	-14.6%	-7.9%	-10.6%
Same Day	-18.6%	-10.7%	-14.3%
Overnight	-8.3%	-5.2%	-6.3%
Total Overseas (%)	3.8%	5.5%	4.9%

Source: Statistics Canada

International Travel Account



Ontario's travel deficit was \$5.6 billion in the first 6 months of 2010, a decrease of 1.9% from 2009. Ontarians spent \$8.4 billion outside of Canada, an increase of 2.0%, while travellers from the U.S. and overseas countries spent \$2.8 billion in Ontario, an increase of 10.8%.

- Ontario's travel deficit with the U.S. was \$3.5 billion, up 0.7% compared to 2009. Ontarians spent \$4.9 billion in the U.S., 2.2% more than in 2009, while U.S. travellers spent \$1.3 billion in Ontario, an increase of 6.5% versus a year ago.
- Ontario's travel deficit with overseas countries was \$2 billion, down 6.0% from 2009. Ontarians spent \$3.5 billion in overseas countries, an increase of 1.7% over 2009, while overseas travellers spent \$1.4 billion in Ontario, an increase of 15.2%.

Canada's travel deficit was \$9.0 billion in the first half of 2010, up 10.1% from 2009.

Source: Statistics Canada, Ontario Ministry of Tourism and Culture



Accommodations

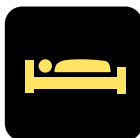
Occupancy Rates, Average Daily Rates and Revenue per Available Room all grew in the first half of 2010

- During Jan-Jun 2010, occupancy rates averaged 57.0%, up 2.7 percentage points over 2009.
- The average daily rate grew 1.3% to \$120.73.
- Revenue per available room increased 6.3% in the first 6 months of 2010 to \$68.78.

Ontario Hotel Occupancy and Average Daily Rates January to June 2010

	Occupancy Percentage (%)			Average Daily Rate (\$)		
	Jan-Jun 2010	Jan-Jun 2009	Point change	Jan-Jun 2010	Jan-Jun 2009	% Change
ONTARIO	57.0%	54.3%	2.7	\$120.73	\$119.17	1.3%
Greater Toronto Area (GTA)	63.6%	58.1%	5.5	\$129.39	\$125.75	2.9%
Downtown Toronto	71.0%	63.6%	7.4	\$159.71	\$146.55	9.0%
Toronto Airport	67.0%	58.9%	8.1	\$113.64	\$115.26	-1.4%
GTA West	56.9%	54.7%	2.2	\$104.01	\$105.98	-1.9%
GTA East/North	55.5%	51.6%	3.8	\$106.86	\$111.15	-3.9%
Eastern Ontario	47.8%	49.0%	-1.2	\$102.26	\$104.87	-2.5%
Kingston	51.7%	58.9%	-7.2	\$114.52	\$114.08	0.4%
Other Eastern Ontario	46.2%	45.2%	1.0	\$96.46	\$100.24	-3.8%
Ottawa	65.9%	66.1%	-0.2	\$135.12	\$136.19	-0.8%
Downtown Ottawa	68.1%	68.7%	-0.6	\$140.14	\$142.30	-1.5%
Ottawa West	60.5%	57.6%	2.9	\$126.98	\$128.50	-1.2%
Ottawa East	59.6%	63.9%	-4.3	\$106.77	\$103.15	3.5%
Southern Ontario	46.9%	46.0%	0.9	\$105.56	\$108.08	-2.3%
London	52.8%	52.8%	-0.1	\$97.54	\$99.90	-2.4%
Windsor	42.8%	42.3%	0.4	\$98.69	\$102.81	-4.0%
K/W/Cambridge/Guelph	48.8%	44.9%	3.9	\$101.74	\$105.50	-3.6%
Hamilton/Brantford	48.7%	49.1%	-0.4	\$101.91	\$107.38	-5.1%
Niagara Falls	47.2%	47.5%	-0.3	\$115.31	\$117.73	-2.1%
Other Niagara Falls Region	37.6%	38.0%	-0.4	\$94.99	\$92.38	2.8%
Other Southern Ontario	43.7%	39.4%	4.3	\$99.18	\$101.60	-2.4%
Central Ontario	43.9%	41.0%	2.9	\$115.88	\$111.67	3.8%
North Eastern Ontario	58.1%	59.3%	-1.2	\$103.74	\$99.46	4.3%
North Bay	52.1%	62.7%	-10.6	\$105.52	\$100.84	4.6%
Sudbury	64.9%	58.3%	6.6	\$107.61	\$106.66	0.9%
North Western Ontario	64.7%	62.2%	2.5	\$96.10	\$95.11	1.0%
Thunder Bay	66.4%	62.0%	4.4	\$96.14	\$95.42	0.8%
Sault Ste. Marie	48.4%	47.2%	1.2	\$97.99	\$89.49	9.5%

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 the first half of 2010, there were approximately 2.2 million user sessions at www.OntarioTravel.net, up 51.3% over 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 91,000 throughout Jan-Jun 2010, an increase of 47.1% over Jan-Jun 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 the first 6 months of 2010, there were approximately 359,000 visits to Ontario's Travel Information Centres (TICs), 4.6% less than in 2009.

Source: Ontario Tourism Marketing Partnership Corp. (OTMPC)

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 2.4% in the first half of 2010 over 2009 to \$9.2 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 2.9%.

Source: Statistics Canada; Ontario Ministry of Tourism and Culture

Tourism-Related Employment



Employment in tourism-related industries increased 1.9% in the first half of 2010

- Employment in Amusement/Recreation, Travel Arrangement and Accommodation/Food Services grew in the first 6 months of 2010 compared to 2009, however this growth was slightly offset by declines in employment in Motion Picture & Video industries and Amusement Parks.
- Ontario's tourism-related employment grew 1.9% in Jan-Jun 2010 while total employment in Ontario grew 1.4%.

Source: Statistics Canada; Ontario Ministry of Tourism and Culture

Travel Price Index



Price of travel in Ontario grew slightly during the first 6 months of 2010

- Ontario's Travel Price Index (TPI) was up by 0.2% in Jan-Jun 2010 compared to 2009. Cost of transportation and accommodations declined while food and beverage prices grew.
- Ontario's Consumer Price Index (CPI) grew 9 times more than TPI. During the first half of 2010, Ontario's CPI grew 1.8% while TPI grew 0.2% over 2009.

Source: Statistics Canada; Ontario Ministry of Tourism and Culture

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

www.research.tourism.gov.on.ca

The Research Unit offers stakeholder a variety of products and services including Bulletins and Newsletters, Web tools, responses to ad hoc requests and presentations of tourism data at meetings and workshops. Here are some examples of how the Research Unit supported the industry in the first half of 2010:

Bulletins/Newsletters: 10 publications were produced, over 32,000 links to these documents were emailed and almost 12,000 hard copies were distributed.

Web Tools: There were approximately 14,000 user sessions on the Ministry's tools: GeoTravelStats, TREIM, eTAMS, and Travel Patterns.

Ad hoc Requests: The Research Unit staff responded to 145 ad hoc requests in the first 6 months of 2010. The majority of these requests came from external stakeholders.

Presentations: The Research Unit made a variety of presentations, including GeoTravelStats, Tourism Outlook, and War of 1812 insights.

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.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

Tourism Industry Association of Ontario
www.tiao.travel

Ontario Tourism Facts & Figures

Upcoming Conferences & Events

- 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
- 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 for more information.

Questions? Suggestions?

Please contact the Research Unit at (416) 325-8287 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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