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Economic Outlook

Economic Indicators Canada and Ontario

		2010*	2011*	2012*
Real Gross Domestic Product** <i>% change over previous year</i>	ON	3.8	2.6	3.0
	Can	3.4	2.5	2.9
Retail Sales <i>% change over previous year</i>	ON	4.7	4.0	4.3
	Can	4.8	3.5	4.5
Unemployment Rate (%)	ON	8.8	7.7	6.6
	Can	8.1	7.4	6.7
Personal Disposable Income <i>% change over previous year</i>	ON	4.3	3.9	4.4
	Can	4.2	3.8	4.7

*Forecast data.

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

Source: Conference Board of Canada, Key Economic Indicators, Provincial Outlook Fall 2010

Tourism Statistics International Border Crossings

U.S. border crossings to Ontario grew 3% in Q3 2010 but decreased 5% in the first 9 months of 2010.

During July to September 2010, there were 4.1 million border crossings from the U.S. to Ontario, an increase of 2.9% versus 2009.

- In Q3 2010, U.S. same day crossings, which represented 42% of crossings to Ontario, increased 3.1% or by 52,000 crossings, while crossings for overnight trips grew 2.9% or 67,000 more crossings compared to Q2 2009.

For the 9 months ending September 2010, there were 8.8 million border crossings from the U.S. to Ontario, a decrease of 4.7% versus Jan-Sep 2009.

Overseas crossings to Ontario grew 7% in Q3 2010 and increased 6% in the first 9 months of 2010.

In Q3 2010, there were 657,000 overseas entries into Ontario, an increase of 6.6% over Q3 2009.

- During the first 9 months of 2010, arrivals from Japan grew 22%, arrivals from France were up 8% and arrivals from Germany increased 6% while arrivals from the U.K. declined 1% compared to 2009. Arrivals from most emerging markets increased in Jan-Sep 2010, especially arrivals from India (+31%) and arrivals from China (+23%) while arrivals from Mexico declined 33%.

International Border Crossings into Ontario, % Change versus year ago

	Q1 2010	Q2 2010	Q3 2010	Jan-Sep 2010
Total International	-12.8%	-6.2%	3.4%	-3.4%
Total U.S.	-14.6%	-7.9%	2.9%	-4.7%
Same Day	-18.6%	-10.7%	3.1%	-7.8%
Overnight	-8.3%	-5.2%	2.9%	-1.8%
Total Overseas (%)	3.8%	5.5%	6.6%	5.7%

Source: Statistics Canada

International Travel Account



Ontario's travel deficit was **\$5.9 billion** in the first 9 months of 2010, an increase of 6.9% from 2009. Ontarians spent **\$10.5 billion** outside of Canada, an increase of 7.0%, while travellers from the U.S. and overseas countries spent **\$4.7 billion** in Ontario, an increase of 7.1%.

- Ontario's travel deficit with the U.S. was **\$3.5 billion**, up 14.0% compared to 2009. Ontarians spent **\$6.0 billion** in the U.S., 9.4% more than in 2009, while U.S. travellers spent **\$2.5 billion** in Ontario, an increase of 3.6% versus a year ago.
- Ontario's travel deficit with overseas countries was **\$2.4 billion**, down 1.9% from 2009. Ontarians spent **\$4.5 billion** in overseas countries, an increase of 4.1% over 2009, while overseas travellers spent **\$2.1 billion** in Ontario, an increase of 11.6%.

Canada's travel deficit was **\$10.5 billion** in the first three quarters of 2010, up 10.3% from 2009.

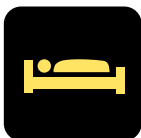
Source: Statistics Canada, Ontario Ministry of Tourism and Culture



Accommodations

Occupancy Rates, Average Daily Rates and Revenue per Available Room all grew in the first 9 months of 2010

- During Jan-Sep 2010, occupancy rates averaged 61.6%, up 3.2 percentage points over 2009.
- The average daily rate grew 1.3% to \$121.67.
- Revenue per available room increased 6.7% in the first 9 months of 2010 to \$74.94.



Ontario Hotel Occupancy and Average Daily Rates January to September 2010

	Occupancy Percentage (%)			Average Daily Rate (\$)		
	Jan-Sep 2010	Jan-Sep 2009	Point change	Jan-Sep 2010	Jan-Sep 2009	% Change
ONTARIO	61.6%	58.4%	3.2	\$121.67	\$120.17	1.3%
Greater Toronto Area (GTA)	67.3%	61.6%	5.7	\$127.12	\$123.98	2.5%
Downtown Toronto	75.4%	68.7%	6.7	\$157.66	\$146.23	7.8%
Toronto Airport	67.0%	59.2%	7.8	\$109.29	\$110.44	-1.0%
GTA West	60.2%	56.8%	3.4	\$101.50	\$103.64	-2.1%
GTA East/North	60.9%	56.1%	4.8	\$105.09	\$107.83	-2.5%
Eastern Ontario	53.2%	53.7%	-0.5	\$106.07	\$107.67	-1.5%
Kingston	56.6%	62.9%	-6.3	\$119.10	\$120.31	-1.0%
Other Eastern Ontario	51.7%	50.1%	1.6	\$99.78	\$101.51	-1.7%
Ottawa	67.5%	66.7%	0.8	\$131.63	\$132.83	-0.9%
Downtown Ottawa	70.5%	69.9%	0.5	\$136.19	\$138.27	-1.5%
Ottawa West	61.7%	58.8%	3.0	\$126.50	\$127.35	-0.7%
Ottawa East	57.9%	59.9%	-2.0	\$103.60	\$100.67	2.9%
Southern Ontario	53.5%	51.6%	1.9	\$114.45	\$116.09	-1.4%
London	54.5%	52.6%	1.9	\$96.78	\$98.42	-1.7%
Windsor	44.0%	41.8%	2.2	\$97.70	\$99.70	-2.0%
K/W/Cambridge/Guelph	51.3%	47.0%	4.3	\$99.93	\$104.13	-4.0%
Hamilton/Brantford	49.5%	52.0%	-2.5	\$100.41	\$105.06	-4.4%
Niagara Falls	59.4%	59.0%	0.4	\$134.37	\$135.88	-1.1%
Other Niagara Falls Region	44.9%	44.2%	0.7	\$99.49	\$96.05	3.6%
Other Southern Ontario	49.5%	43.4%	6.1	\$101.72	\$104.43	-2.6%
Central Ontario	51.2%	48.6%	2.6	\$126.56	\$121.84	3.9%
North Eastern Ontario	61.8%	63.0%	-1.3	\$104.43	\$100.63	3.8%
North Bay	56.3%	66.8%	-10.5	\$105.91	\$101.57	4.3%
Sudbury	67.1%	62.1%	5.1	\$108.39	\$107.35	1.0%
North Western Ontario	70.5%	67.1%	3.3	\$97.84	\$97.07	0.8%
Thunder Bay	71.8%	66.8%	5.1	\$97.52	\$96.70	0.8%
Sault Ste. Marie	57.0%	53.7%	3.3	\$103.03	\$93.80	9.8%

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 9 months of 2010, there were approximately 3.5 million user sessions at www.OntarioTravel.net, up 41.8% 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 177,000 throughout Jan-Sep 2010, an increase of 43.4% over Jan-Sep 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 9 months of 2010, there were approximately 865,000 visits to Ontario's Travel Information Centres (TICs), 1.8% less than in 2009.

Source: Ontario Tourism Marketing Partnership Corp. (OTMPC)

Tourism-Related Employment



Employment in tourism related industries increased 2% in the first 9 months of 2010

- Employment in the Travel Arrangement, Amusement/Recreation and Accommodation/Food Services industries grew in the first 3 quarters 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 2.1% in Jan-Sep 2010 while total employment in Ontario grew 1.7%.

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 Now Include New Travel Regions

This tool provides key tourism data including Travel Statistics, Hotel Occupancy Rates, Economic Impact, and Number of Establishments and it has been updated to include data by the 13 new travel regions.

Regional Tourism Profiles can be accessed via www.tourism.gov.on.ca/english/research/rtp/index.html

Subscriber Database Update – Please update your contact information

The Research Unit is in the process of updating its subscriber database so if you would like to continue to receive our publications then please confirm your contact information at www.mtr-tourismpublications.com/en/login.php

New subscribers can register at www.mtr-tourismpublications.com/en/register.php

Travel Price Index



Price of travel in Ontario grew slightly during the first 9 months of 2010

- Ontario's Travel Price Index (TPI) was up by 0.4% in Jan-Sep 2010 compared to 2009. Cost of transportation and accommodations drove the growth.
- Ontario's Consumer Price Index (CPI) grew more than 5 times TPI. During the first three quarters of 2010, Ontario's CPI grew 2.2% while TPI grew 0.4% over 2009.

Source: Statistics Canada; Ontario Ministry of Tourism and Culture

Food Service and Drinking Places

Sales at Ontario's Restaurants & Bars grew 2%

- Current dollar sales for the Ontario food services and drinking places industry increased 2.2% in the first 3 quarters of 2010 over 2009 to \$13.7 billion. Ontario accounted for 37% of Canada's restaurant and bar sales.
- During the same time period, sales of Canadian food service and drinking places rose 2.6%.

Source: Statistics Canada; Ontario Ministry of Tourism and Culture

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 **MRIA 2011 National Conference, "Ripe with Innovation"**, will be held from **May 29-31** in the beautiful city of **Kelowna**, British Columbia. Known for its scenic environment of lakes and mountains, sunshine and fruit, wine, golf and ski hills, the **Okanagan** is gaining increasing prominence as a centre of incubation for innovative excellence. Please visit www.mria-arim.ca for more details.
- The **Travel and Tourism Research Association 2011 International Conference**, "Seeing the Forest AND the Trees – Big Picture Research in a Detail Driven World", will be held **June 19-21, 2011** in London, Ontario. Please visit www.ttra.com for more details.

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) 325-8287
or by email at tourism.research@ontario.ca

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