

APRIL 2009

Highlights

April 2009 over April 2008:

- Trips from the U.S. to Ontario increased 5.7%, with overnight trips up 10.4% and same-day travel up 2.1%.
- Visits from overseas markets to Ontario declined by 3.5%.
- Travel by Ontarians to the U.S. decreased by 11.4% (same-day trips down by 17.8% and overnight trips down by 1.7%), while travel to overseas countries grew by 3.8%.
- Employment in Ontario's tourism-related industries was unchanged.
- Ontario's Travel Price Index was up by 4.3%.

YTD April 2009 versus YTD April 2008:

- U.S. trips to Ontario decreased 1.0%, with both same-day and overnight visits dropping 1.0%.
- Visits from overseas markets to Ontario decreased 8.5%.
- Ontarians' trips to the U.S. declined by 14.4%, (same-day visits down 18.5% and overnight entries down 8.6%), while travel to overseas countries increased by 3.3%.

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Tourism Industry Statistics

Border Crossings

Total International Entries

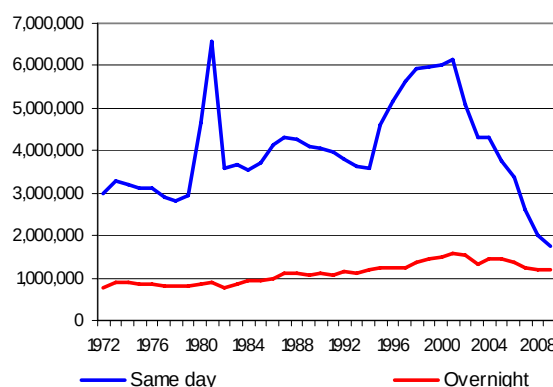
During April 2009, total international border crossings (including U.S. and overseas visitors) to Ontario increased by 4.5% over April 2008 to 1 million crossings. Although April recorded an increase in entries, it should be noted that the Easter holidays occurred in April in 2009 but took place in March in 2008 and this may account for the growth. In 2008, April accounted for 6.5% of Ontario's annual international border crossings.

For the 4 months ending April 2009, total international border crossings (3.3 million entries) declined by 1.9% over 2008.

U.S. Entries

U.S. entries accounted for 88% of international entries into Ontario in April 2009. During this month, U.S. border crossings into Ontario grew 5.7% over April 2008 to 887,000 crossings. This growth was driven by a 10.4% increase in overnight entries while same-day entries were up 2.1%.

US Border Crossings to Ontario, Jan-Apr 1972 - 2009



Source: Statistics Canada

For the 4 months ending April 2009, there were 2.9 million border crossings from the U.S. to Ontario, a decrease of 1.0% over 2008. Both same-day and overnight visits declined 1.0% with 19,000 fewer same-day crossings and 12,000 fewer overnight crossings.

U.S. entries into Ontario increased at a greater rate than the national average in April 2009. During January-April 2009, Ontario, which accounted for 60% of U.S. entries into Canada, experienced a 1.0% decline in U.S. visits, less than the national average decline of 3.3%.

Province	U.S. Entries, Apr 2009 over Apr 2008		U.S. Entries, YTD Apr 2009 over YTD Apr 2008	
	Entries*	% change	Entries*	% change
Ontario	887,486	+5.7%	2,948,409	-1.0%
B.C.	251,333	-3.9%	926,881	-7.7%
Quebec	154,551	+1.4%	519,834	-6.0%
Canada	1,436,777	+2.8%	4,903,081	-3.3%

Source: Statistics Canada

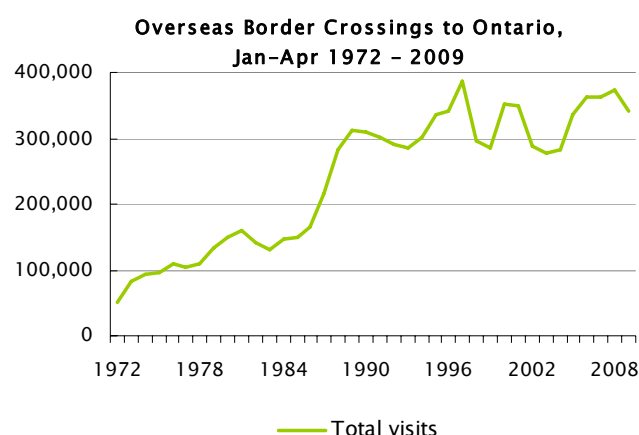
U.S. Entries: Mode of Transportation

In April 2009, 82% of U.S. entries to Ontario were via an automobile, 12% by commercial air travel¹, 5% by bus and 1% by other modes. Entries by automobile were up 8.3% in April 2009 but down 0.9% for the 4 months ending April 2009 compared with 2008. Commercial air travel from the U.S. was down 11.4% in April 2009 while entries by bus were up 22.1%.

Overseas Entries

In April 2009, the 117,000 overseas entries into Ontario accounted for 11.6% of the province's total international entries, a decline of 3.5% compared to April 2008. April accounted for 6.6% of overseas entries in 2008.

During the first 4 months of 2009, overseas entries to Ontario dropped 8.5% over 2008.



Source: Statistics Canada

¹ Commercial Air Travel represents 96% of all air travel

Other provinces experienced an increase in overseas entries while Ontario reported a loss in April 2009. For the 4 months ending April 2009, overseas entries to all regions dropped. Ontario accounted for 37% of Canada's overseas entries during January-April 2009.

Province	Overseas Entries, Apr 2009 over Apr 2008		Overseas Entries, YTD Apr 2009 over YTD Apr 2008	
	Entries*	% change	Entries*	% change
Ontario	116,933	-3.5%	341,115	-8.5%
B.C.	86,077	+5.5%	313,060	-3.7%
Quebec	51,210	+7.0%	163,173	-5.7%
Canada	280,774	+1.1%	917,589	-6.7%

Source: Statistics Canada

Overseas Entries: Traditional Markets

In April 2009, Ontario saw an increase in arrivals from France, Germany, and the UK relative to April 2008, while Japanese arrivals were down.

For the 4 months ending April 2009, arrivals from France rose 18.0% and Germany 1.9% while arrivals from the U.K. and Japan fell compared to 2008.

Market	Apr 2009 over Apr 2008		YTD Apr 2009 over YTD Apr 2008	
	Entries*	% change	Entries*	% change
U.K.	23,111	+0.7%	59,844	-11.9%
Germany	8,163	+12.7%	23,595	+1.9%
Japan	5,464	-6.1%	12,975	-35.9%
France	5,042	+27.5%	15,480	+18.0%

Source: Statistics Canada

Overseas Entries: Emerging Markets

A broader set of origin markets is changing the composition of Ontario's international visitors.

April 2009 arrivals were up 28.1% from Hong Kong and 9.2% from Mexico compared to April 2008. Arrivals during the first 4 months of 2009 were up slightly for China versus 2008.

* Number of non-resident travelers entering Canada through an Ontario port of entry, by country of residence (excluding the United States.) Number of entries will differ from 'visits' reported through domestic and international surveys.

Market*	Apr 2009 over Apr 2008		YTD Apr 2009 over YTD Apr 2008	
	Entries*	% change	Entries*	% change
Mexico	8,571	9.2%	23,440	-17.9%
South Korea	2,749	-41.0%	10,213	-33.5%
India	4,201	-10.1%	11,634	-8.4%
China	3,450	-11.4%	13,258	0.8%
Italy	3,040	-19.9%	8,198	-17.7%
Brazil	2,667	-29.2%	13,074	-3.8%
Australia	2,677	-29.9%	8,394	-20.9%
Netherlands	3,156	-16.0%	8,096	-2.1%
Hong Kong	2,380	28.1%	7,380	-0.6%

Source: Statistics Canada

Outbound Travel

Total International Entries

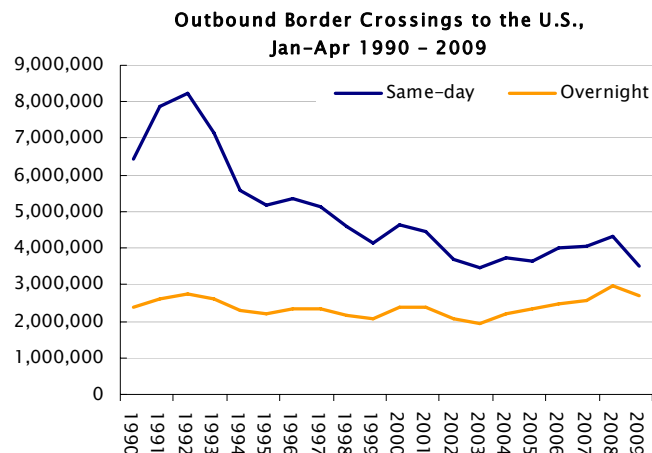
During April 2009, Ontarians made 2.0 million international border crossings (U.S. and overseas), a decline of 9.1% versus April 2008.

Total international border crossings during January-April 2009 by Ontarians decreased 11.3% over 2008 to 7.9 million crossings.

Ontario continues to generate more visitors to international destinations than it receives: in April 2009, there were 1 million international entries into Ontario compared to 2 million international border crossings made by Ontarians.

Travel to the U.S.

Travel to the U.S. accounted for 83% of Ontarian's international visits in April 2009. Ontario residents made 1.7 million entries into the U.S. in April 2009, 11.4% fewer than in April 2008. Same-day visits, which represented 56% of entries, declined 17.8% while overnight visits dropped 1.7%.

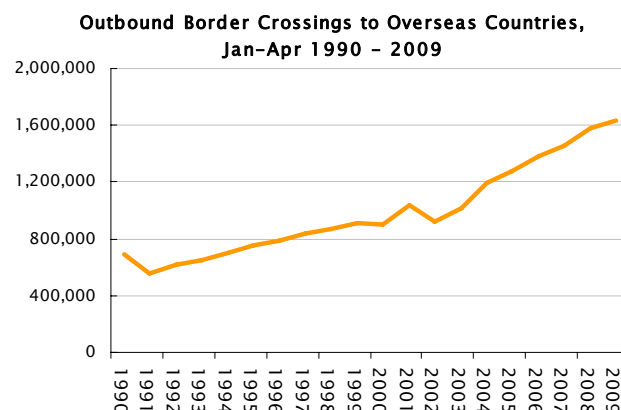


Source: Statistics Canada

For the 4 months ending April 2009, there were 6.2 million border crossings from Ontario to the U.S., a decrease of 14.4% over 2008. Same-day visits declined 18.5% or 797,000 entries while overnight visits dropped 8.6% or 255,000 entries compared to 2008.

Travel to Overseas Countries

In April 2009, overseas travel represented 17% of Ontario resident's international border crossings with 337,000 entries. Travel to overseas countries has been growing since 2003 and this growth is continuing in 2009 with a 3.8% increase in April 2009 and a 3.3% increase during January-April 2009 compared to 2008.



Source: Statistics Canada

Accommodation

Occupancy Rates

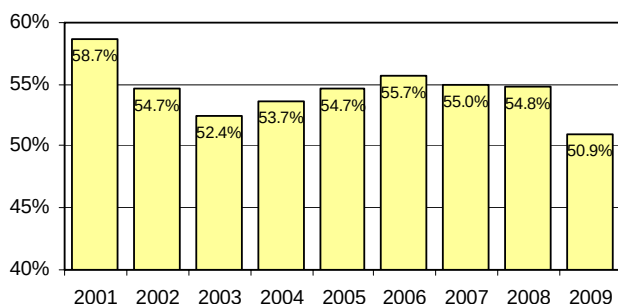
The occupancy rate at Ontario hotels in April 2009 was 53.7%, down 6.3 percentage points over April 2008.

Ottawa, North Eastern Ontario and North Western Ontario all reported occupancy rates over 60% while Central Ontario and parts of Eastern and Southern Ontario posted rates below 40%. Across the province, occupancy was down in all regions except Niagara and Kingston in April 2009 compared to April 2008.

During the first 4 months in 2009, hotel occupancy in Ontario was 50.9%, down 4.0 percentage points compared to the first 4 months of 2008.

Ottawa was the only region to post a 4 month occupancy rate over 60%. Niagara Falls, North Bay and Kingston all grew in the 4 months ending April 2009 compared to April 2008 while all other regions declined.

**Ontario Hotel Occupancy Rates,
Jan-Apr 2001-2009**



Source: PKF Consulting, Hotel Trends

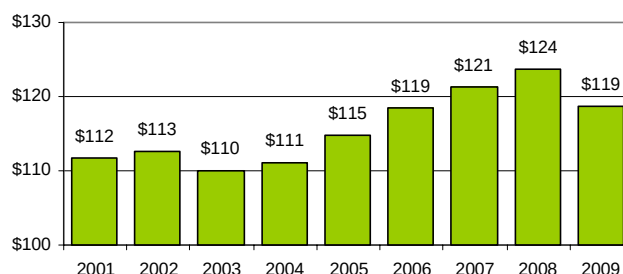
Average Daily Rates

The average daily rate (ADR) in Ontario decreased by 5.6% in April 2009 to \$117.40. ADR averaged \$127.15 in 2008 and fell below \$120 in only one month (Dec) of 2008.

In April 2009, ADR was highest in downtown Toronto at \$143.77 and lowest in Sault Ste. Marie at \$84.04. All regions other than North Eastern and North Western Ontario reported a decrease in monthly ADR compared to the previous year.

For the 4 months ending April 2009, Ontario ADR was down 3.6% to \$118.70 compared to January-April 2008. Year to date ADR is up in North Eastern, North Western, and Eastern Ontario.

**Ontario Hotel ADRs,
Jan-Apr 2001-2009**



Source: PKF Consulting, Hotel Trends

Revenue per Available Room

Revenue per available room (revPAR) at \$63.10 in April 2009 was down by 15.5% over April 2008. During January-April 2009, revPAR was down 10.6% to \$60.37 compared to January-April 2008.

Travel Price Index

Ontario's TPI was up 4.3% in April 2009 compared to April 2008. During the first 4 months of 2009, the Ontario TPI grew 3.7% compared to 2008. Increases in the cost of inter-city and local transportation, food and beverage, and air transportation were the sources of the growth while the cost of operating a vehicle declined.

Relative to April 2008, the growth in Ontario's TPI at 4.3% in April 2009, outpaced the growth of Ontario's CPI which increased by only 0.6% in April 2009.

Source: Statistics Canada, Ontario Ministry of Tourism

The U.S. Travel Price Index for April 2009 was down 8.0% over April 2008.

Source: Travel Industry Association of America

Economic Indicators

Consumer Confidence

The Index of Consumer Confidence climbed 3.7 points in April 2009 to 75.2 (2002 = 100). Although Canadians are concerned over their current financial situation, they are increasingly confident about future financial and employment conditions. Also, for the seventh consecutive month, a greater proportion of consumers indicated that now was a good time to make a major purchase.

Confidence in Ontario increased 3.3 points in April 2009.

Region	Apr 2009	Point change Apr 2009 vs Mar 2009
Canada	75.2	+3.7
BC	93.0	+10.4
Prairie provinces	81.7	+5.6
Ontario	69.6	+3.3
Quebec	70.5	+1.7
Atlantic provinces	77.8	-3.0

Source: The Conference Board of Canada

The U.S. Consumer Confidence Index improved considerably in April 2009 and now stands at 39.2 (1985=100).

Source: The Conference Board

Employment

In April 2009, employment in Ontario's tourism-related industries was unchanged compared to April 2008.

For the 4 months ending April 2009, tourism related employment increased 1.7%. Growth came from the Accommodation & Food services, Amusement & Recreation, and Performing Arts while employment in Heritage Institutions and the Motion Picture Industry declined.

Source: Statistics Canada, Labour Force Survey, Ontario Ministry of Tourism

Consumer Response Indicators

1-800-ONTARIO

There were approximately 8,600 calls to the 1-800-ONTARIO call centre in April 2009, a decline of 24% over April 2008.

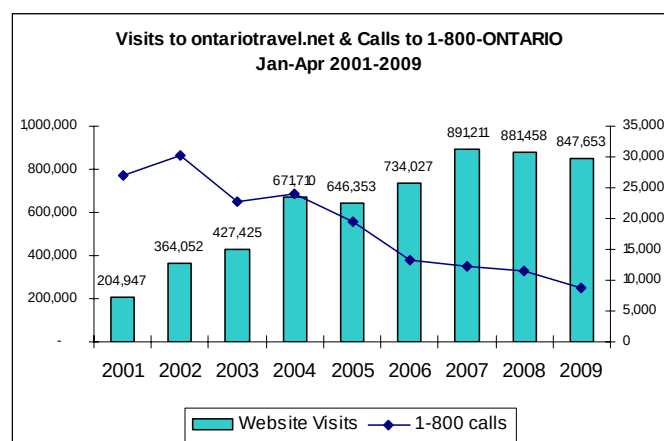
Throughout the first 4 months of 2009, there were about 29,000 calls, a decrease of 19% over the same period in 2008.

Source: Electronic Data Systems

OntarioTravel.net

In April 2009, there were approximately 186,000 user sessions on **ontariotravel.net**, Ontario's travel website, a decrease of 12% in the number of user sessions on the main website compared to April 2008.

During the first 4 months of 2009, there were approximately 848,000 user sessions on the main site of the province's travel website, down 4% from the first 4 months of 2008.



Source: Ontario Tourism Marketing Partnership Corp.



Tourism Performance Bulletin

Ministry of Tourism

Released in June 2009

Ontario Travel Information Centres

Visits to Ontario's Travel Information Centres (TICs) totalled about 51,000 in April 2009, an increase of 1.4% over April 2008.

For the first 4 months of 2009, there were about 157,000 visits to Ontario TICs, 5.2% more than in the first 4 months of 2008.

Change in Visits to Ontario's TICs		
Location	Apr 2009 over Apr 2008	YTD Apr 2009 over YTD Apr 2008
Barrie	-13%	-6%
Cornwall	+15%	+18%
Fort Erie	+45%	+48%
Fort Frances	+68%	+62%
Niagara Falls	+15%	+10%
Sarnia	-32%	-16%
Sault Ste Marie	0%	0%
St. Catharines	+12%	+18%
Toronto	-12%	-7%
Windsor Park	+7%	+5%
Windsor HC	+4%	+11%
Hill Island	Closed for season	Closed for season
Kenora	Closed for season	Closed for season
Lancaster	Closed for season	Closed for season
Pigeon River	Closed for season	Closed for season
Prescott	Closed for season	Closed for season
Rainy River	Closed for season	Closed for season
417	Closed for season	Closed for season
TOTAL	+1%	+5%

Source: Ontario Ministry of Tourism

Attendance at Agencies

The following table shows the percentage change in total visits at Ontario agencies:

Change in Visits to Ontario's Agencies		
Agency	Apr 2009 over Apr 2008	YTD Apr 2009 over YTD Apr 2008
AGO	+213%*	+178%*
Fort William Historical Park	-30%	+66%
Huronian Historical Parks	-10%	-8%
McMichael Gallery	-4%	+17%
Niagara Parks Commission ²	+38%	+24%
Ontario Heritage Trust	-25%	+26%
Ontario Place	-40%	-28%
Ontario Science Centre	+25%	+10%
Royal Botanical Gardens	-40%	-2%
Royal Ontario Museum	-15%	-10%
Science North	+21%	+12%
St Lawrence Parks ³	closed until May	closed until May

*AGO reopened in Nov 08 therefore % change are versus 2007

Source: Individual agencies are self-reporting.

² Niagara Parks Commission attractions include: Sir Adam Beck, Butterfly Conservatory, Aerocar, Maid Of The Mist Elevator, White Water Walk, Journey Behind The Falls, Niagara's Fury

³ St Lawrence Parks includes Fort Henry and Upper Canada Village