

NOVEMBER 2009

Highlights

November 2009 over November 2008:

- Crossings from the U.S. to Ontario decreased 18.0%, with same-day travel down 21.3% and overnight crossings down 13.3%.
- Visits from overseas markets to Ontario declined by 9.5%.
- Travel by Ontarians to the U.S. increased by 2.3% (same-day crossings up 1.3% and overnight crossings up 3.9%), and travel to overseas countries grew 0.2%.
- Employment in Ontario's tourism-related industries decreased by 0.7%.
- Ontario's Travel Price Index increased by 0.5%.

YTD Nov 2009 versus YTD Nov 2008:

- U.S. crossings to Ontario decreased 12.0%, with same-day crossings down 16.2% and overnight crossings down 7.6%.
- Visits from overseas markets to Ontario decreased 14.1%.
- Ontarians' crossings to the U.S. declined by 12.8%, (same-day visits down 16.6% and overnight entries down 7.0%), while travel to overseas countries was down slightly by 0.1%.

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Border Crossings

Total International Entries

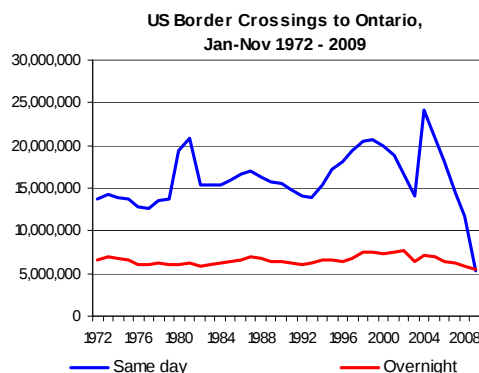
During November 2009, total international border crossings (including U.S. and overseas visitors) to Ontario decreased by 17.2% over November 2008 to 753,000 crossings. In 2008, November accounted for 6.1% of Ontario's annual international border crossings.

For the 11 months ending November 2009, total international border crossings (12.2 million entries) declined by 12.3% over 2008.

U.S. Entries

U.S. entries accounted for 90% of international entries into Ontario in November 2009. During this month, U.S. border crossings into Ontario declined 18.0% over November 2008 to 679,000 crossings. Same-day entries declined 21.3% while overnight entries decreased 13.3%.

As of June 1, 2009 the U.S. government's Western Hemisphere Travel Initiative required all persons, including US residents, to have a passport, a NEXUS card (a pre-approved travel document for low-risk travellers), or an enhanced driver's license in order to enter or re-enter the United States.



Source: Statistics Canada

During the first 11 months of 2009, there were 10.7 million border crossings from the U.S. to Ontario, a decrease of 12.0% over 2008. Same-day crossings declined 16.2% with 1.0 million fewer crossings and overnight crossings dropped 7.6% or 445,000 fewer crossings.

US entries decreased to all regions during both November 2009 and January-November 2009. Ontario accounted for 60% of U.S. entries into Canada during the first 11 months of 2009.

Province	U.S. Entries, Nov 2009 over Nov 2008		U.S. Entries, YTD Nov 2009 over YTD Nov 2008	
	Entries*	% change	Entries*	% change
Ontario	678,789	-18.0%	10,735,618	-12.0%
B.C.	191,145	-14.6%	4,038,413	-4.7%
Quebec	124,366	-8.8%	1,911,340	-6.6%
Canada	1,128,469	-15.5%	19,238,490	-9.2%

Source: Statistics Canada

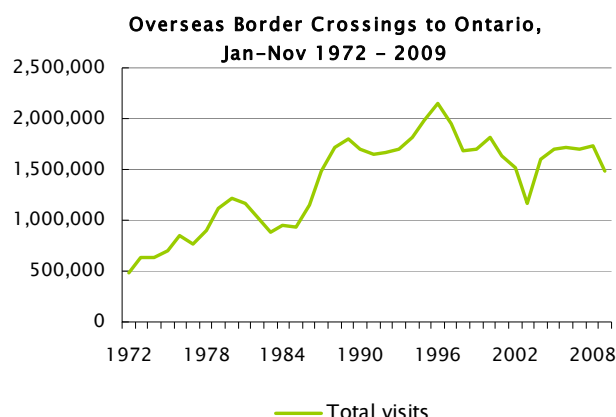
U.S. Entries: Mode of Transportation

In November 2009, 79% of U.S. entries to Ontario were via automobile, 15% by commercial air travel¹, 4% by bus and 1% by other modes. Entries by automobile were down 19.9% in November 2009 and down 12.7% for the 11 months ending November 2009 compared with 2008. Commercial air travel from the U.S. was down 4.4% in November 2009 and entries by bus decreased 28.1%.

Overseas Entries

In November 2009, the 74,000 overseas entries into Ontario accounted for 9.8% of the province's total international entries, a decline of 9.5% compared to November 2008. November accounted for 4.4% of overseas entries in 2008.

During the first 11 months of 2009, overseas entries to Ontario dropped 14.1% over 2008.



Source: Statistics Canada

¹ Commercial Air Travel represents 96% of all air travel

All regions in Canada experienced a decrease in overseas entries both in November 2009 and during the first 11 months of 2009. Ontario accounted for 38% of Canada's overseas entries during January-November 2009.

Province	Overseas Entries, Nov 2009 over Nov 2008		Overseas Entries, YTD Nov 2009 over YTD Nov 2008	
	Entries*	% change	Entries*	% change
Ontario	74,040	-9.5%	1,485,317	-14.1%
B.C.	54,232	-11.7%	1,231,703	-13.2%
Quebec	31,872	-5.4%	738,306	-8.7%
Canada	174,988	-10.0%	3,900,190	-12.7%

Source: Statistics Canada

Overseas Entries: Traditional Markets

In November 2009, arrivals from Japan grew 65.8% and arrivals from France grew 12.0% while arrivals from the other traditional markets of the UK and Germany were down relative to November 2008.

Arrivals from all these long-established markets declined during the first 11 months of 2009 compared to 2008.

Market	Nov 2009 over Nov 2008		YTD Nov 2009 over YTD Nov 2008	
	Entries*	% change	Entries*	% change
U.K.	12,493	-24.3%	274,385	-17.3%
Germany	4,673	-18.6%	110,114	-6.6%
Japan	4,821	65.8%	65,361	-28.4%
France	2,796	12.0%	69,368	-3.5%

Source: Statistics Canada

Overseas Entries: Emerging Markets

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

Arrivals from most overseas countries other than Italy and Australia were down in November 2009. For the 11 months ending November 2009, arrivals declined from all overseas countries compared to 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*	Nov 2009 over Nov 2008		YTD Nov 2009 over YTD Nov 2008	
	Entries*	% change	Entries*	% change
Mexico	1,460	-61.4%	59,776	-41.7%
South Korea	2,404	-6.3%	46,539	-34.2%
India	2,731	-3.5%	50,058	-10.4%
China	3,130	-7.2%	53,825	-0.3%
Italy	2,373	7.4%	46,791	-10.7%
Brazil	1,920	-23.9%	41,041	-17.2%
Australia	2,159	10.4%	37,167	-14.6%
Netherlands	1,508	-1.0%	39,418	-7.5%
Hong Kong	1,677	-7.2%	29,517	-10.7%

Source: Statistics Canada

Outbound Travel

Total International Entries

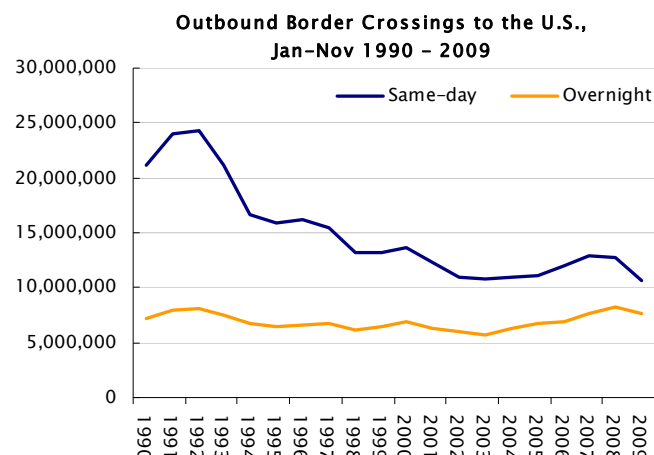
During November 2009, Ontarians made 2.0 million international border crossings (U.S. and overseas), an increase of 2.0% versus November 2008.

Total international border crossings by Ontarians decreased 11.0% to 21.8 million crossings during January-November 2009 compared to 2008.

Ontario continues to generate more visitors to international destinations than it receives: in November 2009, there were 753,000 international entries into Ontario compared to 2.0 million international border crossings made by Ontarians.

Travel to the U.S.

In November 2009, travel to the U.S. accounted for 87% of Ontarian's international visits. Ontario residents made 1.7 million entries into the U.S. in November 2009, 2.3% more than in November 2008. Same-day visits, which represented 61% of entries, grew 1.3% and overnight visits increased 3.9%.



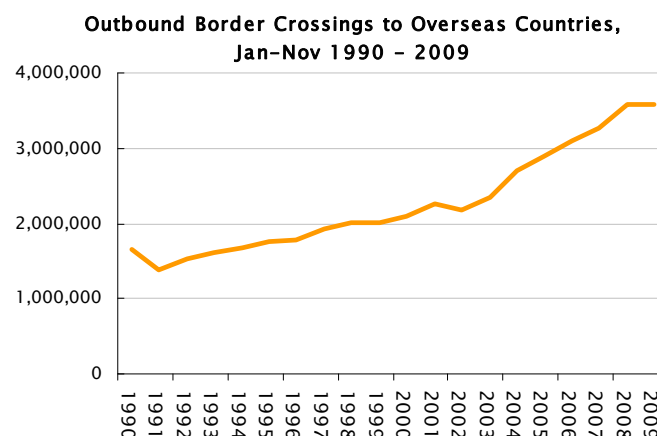
Source: Statistics Canada

For the 11 months ending November 2009, there were 18.2 million border crossings from Ontario to the U.S., a decrease of 12.8% over 2008. Same-day visits declined 16.6% or 2.1 million entries while overnight visits dropped 7.0% or 578,000 entries compared to 2008.

Travel to Overseas Countries

In November 2009, overseas travel represented 13% of Ontario resident's international border crossings with 250,000 crossings. Travel to overseas countries increased 0.2% in November 2009 compared to November 2008.

During the first 11 months of 2009, Ontarians made 3.6 million overseas crossings, down 0.1% from 2008.



Source: Statistics Canada

Accommodation

Occupancy Rates

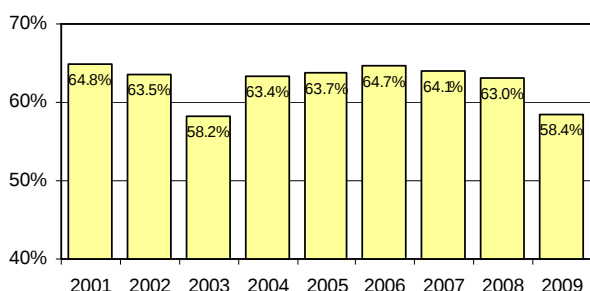
In November 2009, the occupancy rate at Ontario hotels was 55.6%, down 3.5 percentage points over November 2008.

Downtown Toronto reported occupancy rates of 71.4%, while North Eastern and North Western Ontario, and Ottawa all had rates over 60%. Compared to 2008, occupancy was up in Sudbury and Sault Ste. Marie but declined in all other regions.

During the first 11 months in 2009, hotel occupancy in Ontario was 58.4%, down 4.7 percentage points compared to the first 11 months of 2008.

The GTA, Ottawa, Kingston, North Western and North Eastern Ontario all posted a 11 month occupancy rate over 60%. Occupancy rates in all regions other than Sault Ste. Marie declined in the 11 months ending November 2009 compared to November 2008.

Ontario Hotel Occupancy Rates,
Jan-Nov 2001-2009



Source: PKF Consulting, Hotel Trends

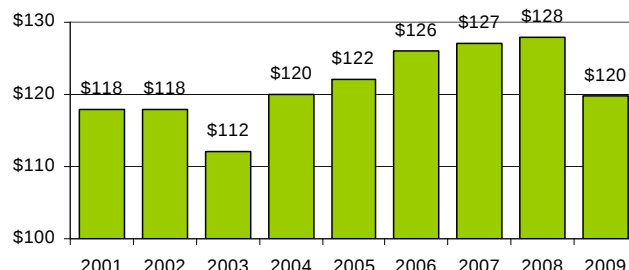
Average Daily Rates

The average daily rate (ADR) decreased by 5.1% in November 2009 to \$117.42.

In November 2009, ADR was highest in downtown Toronto at \$147.29 and lowest in Sault Ste. Marie at \$87.53. North Central and North Western Ontario, Kingston and parts of Southern Ontario reported an increase in monthly ADR compared to the previous year while ADR in all other regions declined.

For the first 11 months of 2009, Ontario ADR was down 6.0% to \$119.76 compared to January-November 2008. Year-to-date ADR was up in Northern Ontario, Ottawa East, and parts of Southern Ontario.

Ontario Hotel ADRs,
Jan-Nov 2001-2009



Source: PKF Consulting, Hotel Trends

Revenue per Available Room

Revenue per available room (revPAR) at \$65.26 in November 2009 was down by 10.7% over November 2008. During January-November 2009, revPAR was down 13.0% to \$69.90 compared to January-November 2008.

Travel Price Index

Ontario's TPI increased 0.5% in November 2009 compared to November 2008; increases in food & beverage and gas were offset by lower air transportation and accommodation prices. During the first 11 months of 2009, the Ontario TPI grew 0.7% 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.

In November 2009, the increase in Ontario's TPI at 0.5% compares to a 1.0% increase in Ontario's CPI.

Ontario Index	Nov 2009 over Nov 2008
TPI	+0.5%
CPI	+1.0%

Source: Statistics Canada, Ontario Ministry of Tourism

The U.S. Travel Price Index for November 2009 was up 1.3% over November 2008 while the US CPI was up 1.8%.

US Index	Nov 2009 over Nov 2008
TPI	+1.3%
CPI	+1.8%

Source: Travel Industry Association of America

Economic Indicators

Consumer Confidence

The Index of Consumer Confidence fell for the second consecutive month in November 2009 to 79.0 (2002 = 100). The outlook for future job creation continues to be a significant deterrent to consumer confidence.

Confidence decreased in all regions except Quebec and the Prairie provinces where it grew slightly. It declined 10.3 points in Ontario in November 2009.

Region	Nov 2009	Point change Nov 2009 vs Oct 2009
Canada	79.0	-5.7
BC	87.8	-13.0
Prairie provinces	90.6	+0.3
Ontario	74.0	-10.3
Quebec	73.9	+0.8
Atlantic provinces	78.6	-4.3

Source: The Conference Board of Canada

The U.S. Consumer Confidence Index increased 0.8 points in November 2009 and now stands at 49.5 (1985=100).

Source: The Conference Board

Employment

In November 2009, employment in Ontario's tourism-related industries was down 0.7% compared to November 2008.

For the 11 months ending November 2009, tourism related employment decreased 1.2% versus 2008. Growth in the Air Transportation, Performing Arts and Amusement/Recreation industries were offset by declines in employment in Heritage Institutions, the Gambling industry and Accommodation services.

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

Consumer Response Indicators

1-800-ONTARIO

There were approximately 2,400 calls to the 1-800-ONTARIO call centre in November 2009, an increase of 5.4% over November 2008.

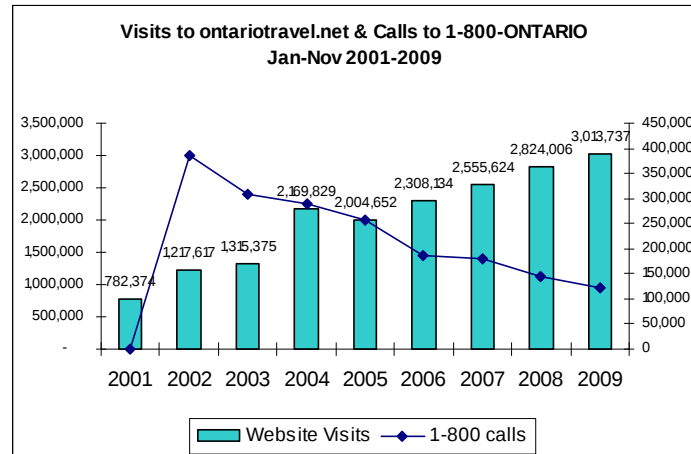
Throughout the first 11 months of 2009, there were about 121,000 calls, a decrease of 16.3% over the same period in 2008.

Source: Electronic Data Systems

OntarioTravel.net

In November 2009, there were approximately 230,000 user sessions on **ontariotravel.net**, Ontario's travel website, an increase of 6.3% in the number of user sessions on the main website compared to November 2008.

During the first 11 months of 2009, there were approximately 3.0 million user sessions on the main site of the province's travel website, up 6.7% from the first 11 months of 2008.



Source: Ontario Tourism Marketing Partnership Corp.

Ontario Travel Information Centres

Visits to Ontario's Travel Information Centres (TICs) totalled about 33,000 in November 2009, a decrease of 8.7% over November 2008.

For the first 11 months of 2009, there were about 967,000 visits to Ontario TICs, 2.4% less than in the first 11 months of 2008.

Change in Visits to Ontario's TICs		
Location	Nov 2009 over Nov 2008	YTD Nov 2009 over YTD Nov 2008
Barrie	15.8%	-10.0%
Cornwall	-12.1%	-3.6%
Fort Erie	-6.4%	15.2%
Fort Frances	-3.1%	29.9%
Niagara Falls	-10.5%	-1.8%
Sarnia	-35.0%	-10.0%
Sault Ste Marie	-7.6%	5.1%
St. Catharines	0.4%	-2.6%
Toronto	-8.9%	-11.6%
Windsor Park	-13.3%	-11.5%
Windsor HC	-6.4%	-9.8%
Hill Island	closed for season	-24.9%
Kenora	closed for season	5.0%
Lancaster	closed for season	25.5%
Pigeon River	closed for season	-11.8%
Prescott	closed for season	69.0%
Rainy River	closed for season	28.3%
417	closed for season	-15.2%
TOTAL	-8.7%	-2.4%

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	Nov 2009 over Nov 2008	YTD Nov 2009 over YTD Nov 2008
AGO	-46%*	+118%*
Fort William Historical Park	+13%	+30%
Huronian Historical Parks	+248%	+10%
McMichael Gallery	n/c	+2%
Niagara Parks Commission ²	-5%	-0.5%
Ontario Heritage Trust	+14%	+10%
Ontario Place	+12%	-11%
Ontario Science Centre	n/a	+17%**
Royal Botanical Gardens	+2%	-1%
Royal Ontario Museum	-5%	+3%
Science North	-6%	+6%
St Lawrence Parks ³	closed	-11%

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

**OSC had new ticket system installed in Nov 09. YTD % chg based on Oct

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