

MARCH 2010

Highlights

March 2010 over March 2009:

- Crossings from the U.S. to Ontario decreased 13.0%, with same-day travel down 19.7% and overnight crossings down 2.4%.
- Travel from overseas markets to Ontario increased by 11.1%.
- Travel by Ontarians to the U.S. increased by 9.4% (same-day crossings up 15.0% and overnight crossings up 3.4%), and travel to overseas countries decreased 0.8%.
- Employment in Ontario's tourism-related industries increased by 3.0%.
- Ontario's Travel Price Index decreased by 3.1%.

YTD March 2010 versus YTD March 2009:

- U.S. crossings to Ontario decreased 14.6%, with same-day crossings down 18.6% and overnight crossings down 8.3%.
- Visits from overseas markets to Ontario grew 3.8%.
- Ontarians' crossings to the U.S. grew by 7.3% (same-day visits up 9.4% and overnight entries up 4.6%), while travel to overseas countries increased 1.3%.

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Tourism Industry Statistics

Border Crossings

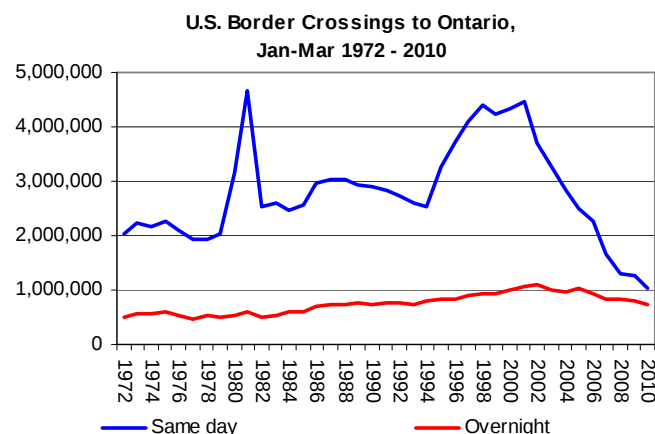
Total International Entries

In March 2010, there were 740,000 international (U.S. and overseas) border crossings into Ontario, a decrease of 10.7% compared to March 2009. In 2009, March accounted for 6.3% of Ontario's annual international border crossings.

For the first 3 months of 2010, total international border crossings declined by 12.8% over 2009 to 2.0 million entries.

U.S. Entries

U.S. entries accounted for 88% of international entries into Ontario in March 2010. During this month, U.S. border crossings into Ontario declined 13.0% over March 2009 to 653,000 crossings. Same-day entries declined 19.7% while overnight entries decreased 2.4%.



Source: Statistics Canada

During Jan-Mar 2010, there were 1.8 million border crossings from the U.S. to Ontario, a decrease of 14.6% over 2009. Same-day crossings declined 18.6% with 236,000 fewer crossings and overnight crossings dropped 8.3% or 66,000 fewer crossings.

In March 2010, U.S. entries decreased to all regions except Quebec where entries grew 1.4%. During the first quarter of 2010, U.S. entries declined to all regions except B.C. (due to Winter Olympics). Ontario accounted for 57% of U.S. entries into Canada in March 2010.

Province	U.S. Entries, Mar 2010 over Mar 2009		U.S. Entries, YTD Mar 2010 over YTD Mar 2009	
	Entries*	% change	Entries*	% change
Canada	1,153,010	-8.1%	3,224,032	-7.0%
B.C.	240,124	-2.1%	763,208	13.0%
Ontario	652,864	-13.0%	1,759,315	-14.6%
Quebec	125,619	1.4%	349,866	-4.2%

Source: Statistics Canada

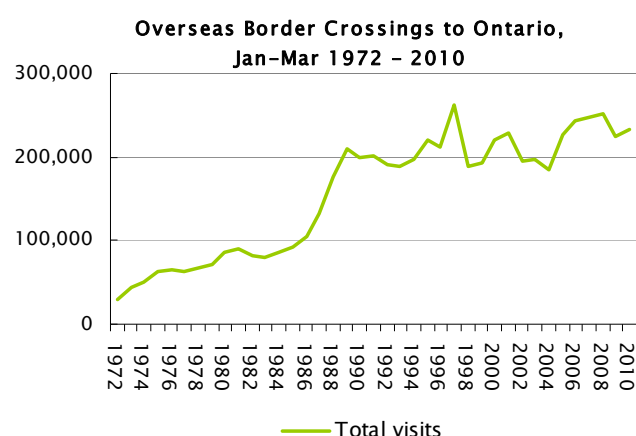
U.S. Entries: Mode of Transportation

In March 2010, 77% of U.S. entries to Ontario were via automobile, 16% by commercial air travel¹, 5% by bus and 1% by other modes. Entries by automobile were down 17.5% in March 2010 and down 17.7% for the 3 months ending March 2010 compared with 2009. Commercial air travel from the U.S. was up 14.5% in March 2010 and entries by bus grew 0.9%.

Overseas Entries

In March 2010, the 87,000 overseas entries into Ontario accounted for 11.8% of the province's total international entries, an increase of 11.1% compared to March 2009. March accounted for 4.9% of overseas entries in 2009.

During the first 3 months of 2010, overseas entries to Ontario grew 3.8% over 2009.



Source: Statistics Canada

¹ Commercial Air Travel represents 96% of all air travel

In March 2010, overseas entries increased to all regions with Quebec reporting the largest gain of 12.4%. All regions in Canada also experienced growth in overseas entries in Jan-Mar 2010 with B.C. entries up the most at 4.3%. Ontario accounted for 36% of Canada's overseas entries during March 2010.

Province	Overseas Entries, Mar 2010 over Mar 2009		Overseas Entries, YTD Mar 2010 over YTD Mar 2009	
	Entries*	% change	Entries*	% change
Canada	239,620	11.2%	659,529	3.6%
B.C.	87,667	12.0%	236,807	4.3%
Ontario	87,375	11.1%	232,637	3.8%
Quebec	38,953	12.4%	115,870	3.5%

Source: Statistics Canada

Overseas Entries: Traditional Markets

In March 2010, arrivals from all traditional markets grew with arrivals from Japan up 53.9%, arrivals from Germany grew 24.1%, entries from the U.K. up 8.9% and arrivals from France increased 4.5% over March 2009.

Arrivals from all these long-established markets except the U.K. increased during the first quarter of 2010 compared to 2009, with entries from Japan up 62.4%.

Market	Mar 2010 over Mar 2009		YTD Mar 2010 over YTD Mar 2009	
	Entries*	% change	Entries*	% change
U.K.	13,764	8.9%	36,608	-0.3%
Germany	6,281	24.1%	16,380	6.1%
Japan	5,199	53.9%	12,198	62.4%
France	3,207	4.5%	10,571	1.3%

Source: Statistics Canada

Overseas Entries: Emerging Markets

Arrivals from most overseas countries other than Mexico, and the Netherlands had double digit growth in March 2010 compared to March 2009. During the first 3 months of 2010, arrivals were up from all reported countries except China (-4%), Mexico (-46%), and the Netherlands (-13%). Entries from India increased 29%, and South Korea arrivals were up 12% in Q1 2010.

* Number of non-resident travellers 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	Mar 2010 over Mar 2009		YTD Mar 2010 over YTD Mar 2009	
	Entries*	% change	Entries*	% change
Brazil	2,713	14.9%	11,045	6.1%
India	3,375	15.4%	9,592	29.0%
China	3,488	18.9%	9,425	-3.9%
South Korea	2,901	11.3%	8,335	11.7%
Mexico	3,576	-40.6%	8,070	-45.7%
Australia	2,265	43.5%	5,748	0.5%
Italy	2,110	19.3%	5,697	10.4%
Hong Kong	1,788	10.2%	5,134	2.7%
Netherlands	1,529	-12.2%	4,275	-13.5%

Source: Statistics Canada

Outbound Travel

Total International Travel

During March 2010, Ontarians made 2.5 million international border crossings (U.S. and overseas), an increase of 7.4% versus March 2009.

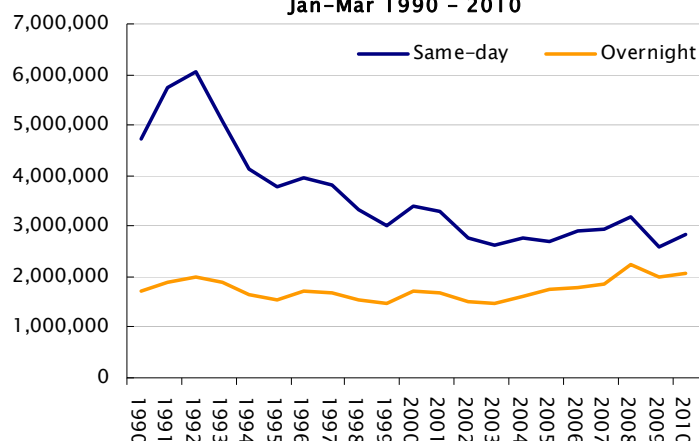
Total international border crossings by Ontarians increased 6.0% to 6.2 million crossings during Jan-Mar 2010 compared to 2009.

Ontario continues to generate more visitors to international destinations than it receives: in Jan-Mar 2010, there were 2.0 million international entries into Ontario compared to 6.2 million international border crossings made by Ontarians.

Travel to the U.S.

In March 2010, travel to the U.S. accounted for 81.4% of Ontarian's international visits. Ontario residents made 2.0 million entries into the U.S. in March 2010, 9.4% more than in March 2009. Same-day visits, which represented 54% of entries, grew 15.0% while overnight visits increased 3.4%.

Outbound Border Crossings to the U.S.,
Jan-Mar 1990 - 2010



Source: Statistics Canada

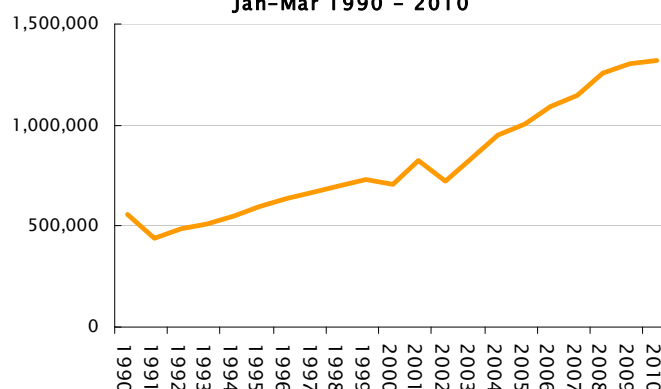
During the first quarter of 2010, there were 4.9 million border crossings from Ontario to the U.S., an increase of 7.3% over 2009. Same-day visits grew 9.4% or 246,000 entries while overnight visits increased 4.6% or 91,000 entries compared to 2009.

Travel to Overseas Countries

In March 2010, overseas travel represented 18.6% of Ontario resident's international border crossings with 462,000 crossings. Travel to overseas countries decreased 0.8% in March 2010 compared to March 2009.

During Jan-Mar 2010, Ontarians made 1.3 million overseas crossings, up 1.3% from 2009.

Outbound Border Crossings to Overseas Countries,
Jan-Mar 1990 - 2010



Source: Statistics Canada

Accommodation

Occupancy Rates

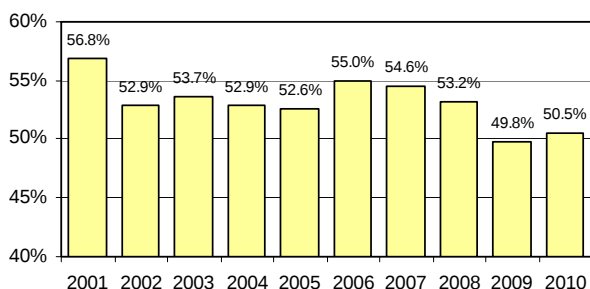
In March 2010, the occupancy rate at Ontario hotels was 54.6%, up 3.1 percentage points over March 2009.

Downtown Toronto reported occupancy of 71.4% while downtown Ottawa, Toronto Airport, North Eastern and North Western Ontario posted rates above 60%. Compared to March 2009, occupancy was up in all regions other than Kingston, London, Windsor and North Bay.

During the first 3 months of 2010, hotel occupancy in Ontario was 50.5%, up 0.6 percentage points compared to 2009.

Downtown Ottawa, Ottawa East and Toronto Airport all posted a first quarter occupancy rate over 60%. Occupancy rates in all regions other than the GTA and Northern Ontario declined in Jan-Mar 2010 compared to 2009.

Ontario Hotel Occupancy Rates,
Jan-Mar 2001-2010



Source: PKF Consulting, Hotel Trends

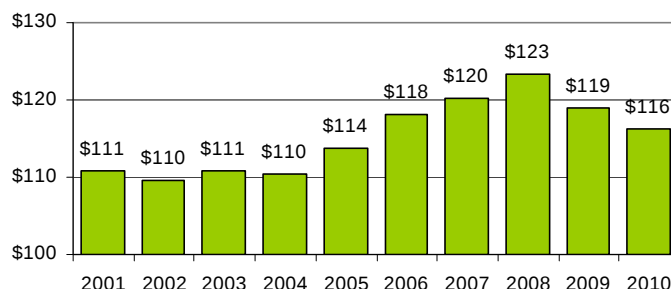
Average Daily Rates

The average daily rate (ADR) decreased by 0.3% in March 2010 to \$118.68.

In March 2010, ADR was highest in downtown Toronto at \$153.84 and lowest in Eastern Ontario (other than Kingston) at \$92.96. Northern Ontario, Ottawa and downtown Toronto reported an increase in monthly ADR compared to the previous year while ADR in all other regions declined.

During Jan-Mar 2010, Ontario ADR was down 2.5% to \$116.22 compared to Jan-Mar 2009. Year-to-date ADR was up only in Northern Ontario.

Ontario Hotel ADRs,
Jan-Mar 2001-2010



Source: PKF Consulting, Hotel Trends

Revenue per Available Room

Revenue per available room (revPAR) at \$64.76 in March 2010 was up 5.6% over March 2009. During January-March 2010, revPAR was down 1.3% to \$58.66 compared to January-March 2009.

Travel Price Index (TPI)

Ontario's TPI decreased 3.1% in March 2010 compared to March 2009; increases in gas prices were offset by lower air and inter-city transportation costs.

During the first 3 months of 2010, the Ontario TPI declined 2.2% compared to 2009.

In March 2010, the decrease in Ontario's TPI of 3.1% compares to a 1.4% increase in Ontario's CPI (Consumer Price Index).

Ontario Index	Mar 2010 over Mar 2009
TPI	-3.1%
CPI	+1.4%

Source: Statistics Canada, Ontario Ministry of Tourism and Culture

The U.S. Travel Price Index for March 2010 was up 4.8% over March 2009 while the U.S. CPI was up 2.3%.

U.S. Index	Mar 2010 over Mar 2009
TPI	+4.8%
CPI	+2.3%

Source: Travel Industry Association of America

Economic Indicators

Consumer Confidence

The Index of Consumer Confidence increased 4.3 points in March 2010 to 92.5 (2002 = 100). The balance of opinion grew on three of the four components, especially employment and major purchases.

Confidence increased in all regions except Ontario and the Atlantic provinces. It declined 2.7 points to 81.3 in Ontario in March 2010.

Region	Mar 2010	Point change Mar 2010 vs Feb 2010
Canada	92.5	+4.3
B.C.	121.1	+25.9
Prairie provinces	111.2	+13.0
Ontario	81.3	-2.7
Quebec	83.4	+1.5
Atlantic provinces	91.3	-2.8

Source: The Conference Board of Canada

The U.S. Consumer Confidence Index grew 6.1 points in March 2010 and now stands at 52.5 (1985=100).

Source: The Conference Board of Canada

Employment

In March 2010, employment in Ontario's tourism-related industries was up 3.0% compared to March 2009. This compares to a 0.6% increase in total employment in Ontario.

Ontario Employment	Mar 2010 over Mar 2009
Tourism Employment	+3.0%
Total Employment	+0.6%

During the first 3 months of 2010, tourism-related employment increased 2.1% versus 2009. Growth in the Amusement/Recreation, Travel Accommodations and Gambling industries was offset by declines in employment in Retail and Motion Picture & Video industries.

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

Consumer Response Indicators

1-800-ONTARIO

There were approximately 17,100 calls to the 1-800-ONTARIO call centre in March 2010, an increase of 98.8% over March 2009.

Throughout the first 3 months of 2010, there were about 30,000 calls, an increase of 49.7% over 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

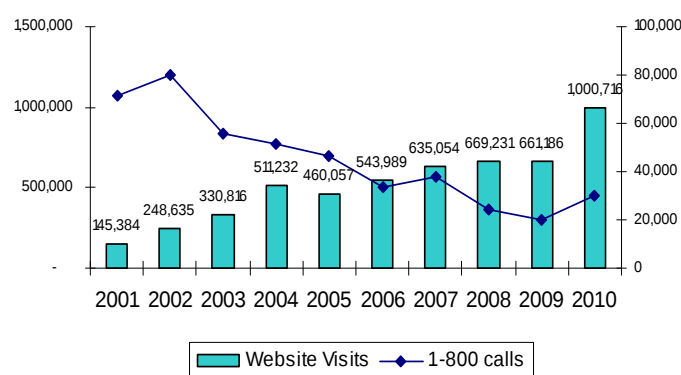
OntarioTravel.net

In March 2010, there were approximately 348,000 user sessions on www.ontariotravel.net, Ontario's travel website, an increase of 57.9% in the number of user sessions on the main website compared to March 2009.

During Jan-Mar 2010, there were approximately 1.0 million user sessions on the main site of the province's travel website, up 51.4% from 2009.

The Winter Olympic campaign, Search Engine Marketing and Social Media tactics all contributed to this increase in user sessions.

Visits to ontariotravel.net & Calls to 1-800-ONTARIO
Jan-Mar 2001-2010



Source: Ontario Tourism Marketing Partnership Corporation

Ontario Travel Information Centres

Visits to Ontario's Travel Information Centres (TICs) totalled about 38,000 in March 2010, a decrease of 8.3% over March 2009.

During the first quarter of 2010, there were about 93,000 visits to Ontario TICs, 12.7% less than in 2009.

Change in Visits to Ontario's TICs		
Location	Mar 2010 over Mar 2009	YTD Mar 2010 over YTD Mar 2009
Barrie	-0.8%	-1.7%
Cornwall	-20.3%	-22.3%
Fort Erie	-20.4%	-21.7%
Fort Frances	0.3%	-8.3%
Niagara Falls	0.3%	-0.7%
Sarnia	21.6%	-19.4%
Sault Ste Marie	3.5%	2.9%
St. Catharines	-13.8%	-14.4%
Toronto	-8.1%	-13.9%
Windsor Park	-21.1%	-25.5%
Windsor HC	-28.8%	-27.3%
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	-8.3%	-12.7%

Source: Ontario Ministry of Tourism and Culture

Attendance at Agencies

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

Change in Visits to Ontario's Agencies		
Agency	Mar 2010 over Mar 2009	YTD Mar 2010 over YTD Mar 2009
AGO	Not available	+70%*
Fort William Historical Park	+4%	-23%
Huronian Historical Parks	-27%	+20%
McMichael Gallery	-13%	-25%
Niagara Parks Commission ²	-11%	-7%
Ontario Heritage Trust	-20%	-41%
Ontario Place	+6%	+20%
Ontario Science Centre	Not available	+55%*
Royal Botanical Gardens	-8%	-4%
Royal Ontario Museum	-12%	-20%
Science North	+21%	+18%
St Lawrence Parks ³	Closed until May	Closed until May

Source: Individual agencies are self-reporting

* YTD Feb 2010 over YTD Feb 2009

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