

APRIL 2010

Highlights

April 2010 over April 2009:

- Crossings from the U.S. to Ontario decreased 15.0%, with same-day travel down 19.4% and overnight crossings down 9.4%.
- Travel from overseas markets to Ontario decreased by 6.2%.
- Travel by Ontarians to the U.S. increased by 12.4% (same-day crossings up 17.6% and overnight crossings up 5.7%), and travel to overseas countries grew 7.1%.
- Employment in Ontario's tourism-related industries increased by 0.5%.
- Ontario's Travel Price Index increased by 0.3%.

YTD April 2010 versus YTD April 2009:

- U.S. crossings to Ontario decreased 14.7%, with same-day crossings down 18.8% and overnight crossings down 8.7%.
- Visits from overseas markets to Ontario grew 0.3%.
- Ontarians' crossings to the U.S. grew by 8.7% (same-day visits up 11.6% and overnight entries up 4.9%), while travel to overseas countries increased 2.5%.

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Tourism Industry Statistics

Border Crossings

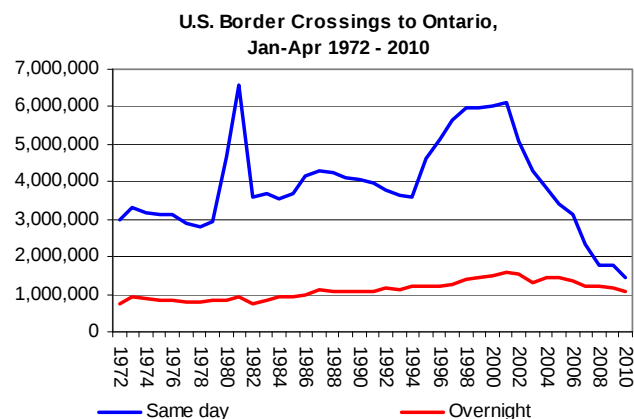
Total International Entries

In April 2010, there were 864,000 international (U.S. and overseas) border crossings into Ontario, a decreased of 13.9% compared to April 2009. In 2009, April accounted for 7.7% of Ontario's annual international border crossings.

For the first 4 months of 2010, total international border crossings declined by 13.2% over 2009 to 2.9 million entries.

U.S. Entries

U.S. entries accounted for 87% of international entries into Ontario in April 2010. During this month, U.S. border crossings into Ontario declined 15.0% over April 2009 to 755,000 crossings. Same-day entries declined 19.4% while overnight entries decreased 9.4%.



Source: Statistics Canada

During Jan-Apr 2010, there were 2.5 million border crossings from the U.S. to Ontario, a decrease of 14.7% over 2009. Same-day crossings declined 18.8% with 332,000 fewer crossings and overnight crossings dropped 8.7% or 102,000 fewer crossings.

In April 2010, U.S. entries decreased to all regions except B.C. where entries grew 3.4%. Similarly, during the first 4 months of 2010, U.S. entries declined to all regions except B.C. (likely due to Winter Olympics). Ontario accounted for 58% of U.S. entries into Canada in April 2010.

Province	U.S. Entries, Apr 2010 over Apr 2009		U.S. Entries, YTD Apr 2010 over YTD Apr 2009	
	Entries*	% change	Entries*	% change
Canada	1,292,826	-10.0%	4,516,858	-7.9%
B.C.	259,998	3.4%	1,023,206	10.4%
Ontario	754,739	-15.0%	2,514,054	-14.7%
Quebec	142,744	-7.6%	492,610	-5.2%

Source: Statistics Canada

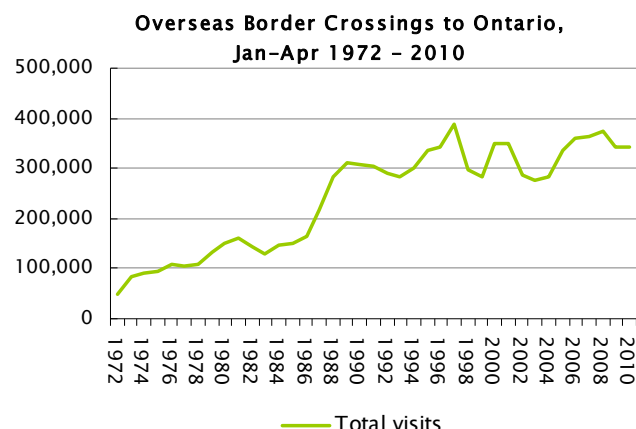
U.S. Entries: Mode of Transportation

In April 2010, 78% of U.S. entries to Ontario were via automobile, 15% by commercial air travel¹, 5% by bus and 1% by other modes. Entries by automobile were down 18.8% in April 2010 and down 18.0% for the 4 months ending April 2010 compared with 2009. Commercial air travel from the U.S. was up 9.2% in April 2010 and entries by bus declined 12.3%.

Overseas Entries

In April 2010, the 110,000 overseas entries into Ontario accounted for 12.7% of the province's total international entries, a decrease of 6.2% compared to April 2009. April accounted for 7.3% of overseas entries in 2009.

During the first 4 months of 2010, overseas entries to Ontario grew 0.3% over 2009.



Source: Statistics Canada

¹ Commercial Air Travel represents 96% of all air travel

In April 2010, overseas entries decreased to all regions with Ontario reporting the largest decline. All regions in Canada experienced growth in overseas entries in Jan-Apr 2010 with B.C. entries up the most at 2.7%. Ontario accounted for 41% of Canada's overseas entries during April 2010.

Province	Overseas Entries, Apr 2010 over Apr 2009		Overseas Entries, YTD Apr 2010 over YTD Apr 2009	
	Entries*	% change	Entries*	% change
Canada	267,739	-4.6%	927,268	1.1%
B.C.	84,736	-1.6%	321,543	2.7%
Ontario	109,650	-6.2%	342,287	0.3%
Quebec	49,484	-3.4%	165,354	1.3%

Source: Statistics Canada

Overseas Entries: Traditional Markets

In April 2010, arrivals from most traditional markets declined other than arrivals from Germany which grew 2.8%. Arrivals from the U.K. dropped 14.6%, entries from Japan were down 12.9% and arrivals from France decreased 17.0% over April 2009.

During Jan-Apr 2010, arrivals from Japan were up 30.7% and entries from Germany grew 5.0% while arrivals from the U.K. and France declined compared to 2009.

Market	Apr 2010 over Apr 2009		YTD Apr 2010 over YTD Apr 2009	
	Entries*	% change	Entries*	% change
U.K.	19,739	-14.6%	56,347	-5.8%
Germany	8,389	2.8%	24,769	5.0%
Japan	4,759	-12.9%	16,957	30.7%
France	4,183	-17.0%	14,754	-4.7%

Source: Statistics Canada

Overseas Entries: Emerging Markets

Arrivals from most overseas countries grew in April 2010 compared to April 2009 with entries from Brazil up 48.8%. During the first 4 months of 2010, arrivals were up from all reported countries except Mexico (-48.8%), and the Netherlands (-16.3%). Entries from India increased 23.5%, and arrivals from South Korea were up 16.4% in Jan-Apr 2010 versus 2009.

* 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	Apr 2010 over Apr 2009		YTD Apr 2010 over YTD Apr 2009	
	Entries*	% change	Entries*	% change
Brazil	3,969	48.8%	15,014	14.8%
India	4,772	13.6%	14,364	23.5%
China	3,997	15.9%	13,422	1.2%
Mexico	3,923	-54.2%	11,993	-48.8%
South Korea	3,548	29.1%	11,883	16.4%
Australia	3,122	16.6%	8,870	5.7%
Italy	2,716	-10.7%	8,413	2.6%
Hong Kong	2,308	-3.0%	7,442	0.8%
Netherlands	2,505	-20.6%	6,780	-16.3%

Source: Statistics Canada

Outbound Travel

Total International Travel

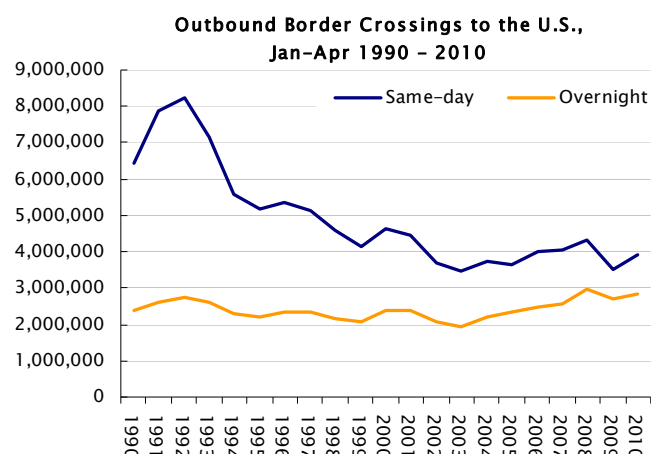
During April 2010, Ontarians made 2.2 million international border crossings (U.S. and overseas), an increase of 11.5% versus April 2009.

Total international border crossings by Ontarians increased 7.4% to 8.5 million crossings during Jan-Apr 2010 compared to 2009.

Ontario continues to generate more visitors to international destinations than it receives: in Jan-Apr 2010, there were 2.9 million international entries into Ontario compared to 8.5 million international border crossings made by Ontarians.

Travel to the U.S.

In April 2010, travel to the U.S. accounted for 84% of Ontario's international visits. Ontario residents made 1.9 million entries into the U.S. in April 2010, 12.4% more than in April 2009. Same-day visits, which represented 58% of entries, grew 17.6% while overnight visits increased 5.7%.



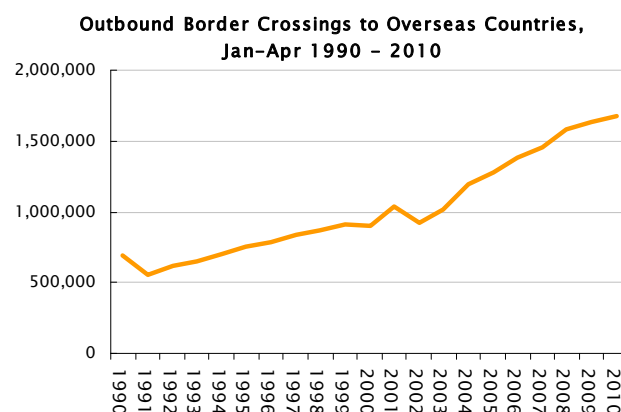
Source: Statistics Canada

During the first four months of 2010, there were 6.8 million border crossings from Ontario to the U.S., an increase of 8.7% over 2009. Same-day visits grew 11.6% or 407,000 entries while overnight visits increased 4.9% or 133,000 entries compared to 2009.

Travel to Overseas Countries

In April 2010, overseas travel represented 16% of Ontario resident's international border crossings with 360,000 crossings. Travel to overseas countries grew 7.1% in April 2010 compared to April 2009.

During Jan-Apr 2010, Ontarians made 1.7 million overseas crossings, up 2.5% from 2009.



Source: Statistics Canada

Accommodation

Occupancy Rates

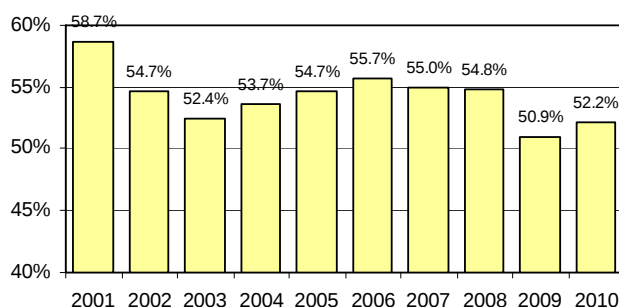
In April 2010, the occupancy rate at Ontario hotels was 57.5%, up 3.7 percentage points over April 2009.

Downtown Toronto reported occupancy of 75.8% while Ottawa, Toronto Airport, Sudbury and North Western Ontario posted rates above 60%. Compared to April 2009, occupancy was up in all regions other than Kingston, Ottawa East, Southern Ontario, Sault Ste Marie and North Bay.

During the first 4 months of 2010, hotel occupancy in Ontario was 52.2%, up 1.3 percentage points compared to 2009.

Downtown Toronto, Toronto Airport, downtown Ottawa, Sudbury and North Western Ontario all posted a 4 month occupancy rate over 60%. Occupancy rates in all regions other than the GTA and Northern Ontario declined in Jan-Apr 2010 compared to 2009.

Ontario Hotel Occupancy Rates,
Jan-Apr 2001-2010



Source: PKF Consulting, Hotel Trends

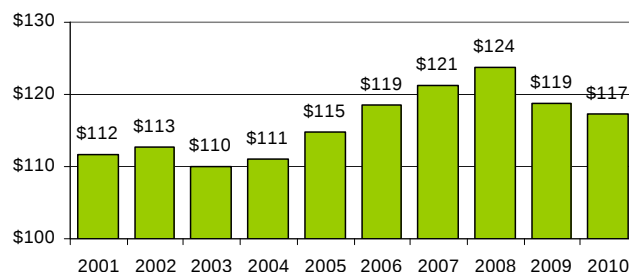
Average Daily Rates

The average daily rate (ADR) increased by 2.9% in April 2010 to \$120.51.

In April 2010, ADR was highest in downtown Toronto at \$167.12 and lowest in Eastern Ontario (other than Kingston) at \$94.20. The GTA and Northern Ontario, Ottawa reported an increase in monthly ADR compared to the previous year while ADR in all other regions declined.

During Jan-Apr 2010, Ontario ADR was down 1.1% to \$117.27 compared to Jan-Apr 2009. Year-to-date ADR was up only in downtown Toronto and Northern Ontario.

Ontario Hotel ADRs,
Jan-Apr 2001-2010



Source: PKF Consulting, Hotel Trends

Revenue per Available Room

Revenue per available room (revPAR) was \$69.25 in April 2010 was up 10.0% over April 2009. During January-April 2010, revPAR was down 1.4% to \$61.17 compared to January-April 2009.

Travel Price Index (TPI)

Ontario's TPI increased 0.3% in April 2010 compared to April 2009; increases in transportation and accommodation costs were offset by lower food and beverage prices. This compares to a 2.2% increase in the Ontario Consumer Price Index (CPI).

During the first 4 months of 2010, the Ontario TPI grew 0.6% compared to 2009 while Ontario's CPI increased 1.8%.

Ontario Index	Apr 2010 over Apr 2009	YTD Apr 2010 over YTD Apr 2009
TPI	+0.3%	+0.6%
CPI	+2.2%	+1.8%

Source: Statistics Canada, Ontario Ministry of Tourism and Culture

The U.S. Travel Price Index for April 2010 was up 5.4% over April 2009 while the U.S. CPI was up 2.2%.

U.S. Index	Apr 2010 over Apr 2009
TPI	+5.4%
CPI	+2.2%

Source: Travel Industry Association of America

Economic Indicators

Consumer Confidence

The Canadian Index of Consumer Confidence fell 7.8 points in April 2010 to 84.8 (2002 = 100). The balance of opinion declined on all four components, especially current and future financial situations.

Confidence increased in Ontario and the Atlantic provinces but declined in all other regions. It grew 3.9 points to 85.3 in Ontario in April 2010.

Region	Apr 2010	Point change Apr 2010 vs Mar 2010
Canada	84.8	-7.8
B.C.	92.8	-28.3
Prairie provinces	93.7	-17.5
Ontario	85.3	+3.9
Quebec	69.4	-1.4.0
Atlantic provinces	94.8	+3.5

Source: The Conference Board of Canada

The U.S. Consumer Confidence Index grew 5.6 points in April 2010 and now stands at 57.9 (1985=100).

Source: The Conference Board of Canada

Employment

In April 2010, employment in Ontario's tourism-related industries was up 0.5% compared to April 2009. This compares to a 1.4% increase in total employment in Ontario.

Ontario Employment	Apr 2010 over Apr 2009	YTD Apr 2010 over YTD Apr 2009
Tourism Employment	+0.5%	+1.7%
Total Employment	+1.4%	+0.6%

During the first 4 months of 2010, tourism-related employment increased 1.7% versus 2009. Growth in the Amusement/Recreation, Travel Accommodations and Accommodation/Food Service 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 12,000 calls to the 1-800-ONTARIO call centre in April 2010, an increase of 40.6% over April 2009.

Throughout the first 4 months of 2010, there were about 42,000 calls, an increase of 46.9% 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.

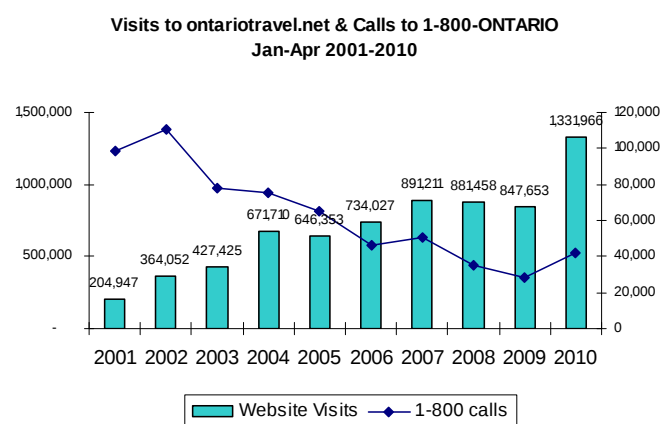
Source: Electronic Data Systems

OntarioTravel.net

In April 2010, there were approximately 331,000 user sessions on www.ontariotravel.net, Ontario's travel website, an increase of 77.6% in the number of user sessions on the main website compared to April 2009.

During Jan-Apr 2010, there were approximately 1.3 million user sessions on the main site of the province's travel website, up 57.1% from 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 Corporation

Ontario Travel Information Centres

Visits to Ontario's Travel Information Centres (TICs) totalled about 47,000 in April 2010, a decrease of 6.7% over April 2009.

During the 4 months of 2010, there were approximately 140,000 visits to Ontario TICs, 10.6% less than in 2009.

Change in Visits to Ontario's TICs		
Location	Apr 2010 over Apr 2009	YTD Apr 2010 over YTD Apr 2009
Barrie	-3.5%	-2.2%
Cornwall	-14.3%	-20.0%
Fort Erie	-24.4%	-22.5%
Fort Frances	0.6%	-5.8%
Niagara Falls	7.0%	2.1%
Sarnia	35.7%	-1.7%
Sault Ste Marie	0.5%	2.0%
St. Catharines	-15.2%	-14.7%
Toronto	0.0%	-9.6%
Windsor Park	-33.3%	-28.1%
Windsor HC	-22.0%	-25.5%
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	-6.7%	-10.6%

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	Apr 2010 over Apr 2009	YTD Apr 2010 over YTD Apr 2009
AGO	Not available	+70%
Fort William Historical Park	+64%	-16%
Huronian Historical Parks	-23%	-8%
McMichael Gallery	-19%	-23%
Niagara Parks Commission ²	+18%	+13%
Ontario Heritage Trust	-58%	-48%
Ontario Place	+25%	+21%
Ontario Science Centre	+7%	+16%*
Royal Botanical Gardens	+10%	+1%
Royal Ontario Museum	-17%	-19%
Science North	+5%	+14%
St Lawrence Parks ³	Closed until May	Closed until May

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