



JULY 2010

Highlights

July 2010 over July 2009:

- Crossings from the U.S. to Ontario increased 7.8%, with same-day crossings up 9.1% and overnight crossings up 7.0%.
- Crossings from overseas markets to Ontario increased by 6.4%.
- Crossings by Ontarians to the U.S. increased by 22.4% (same-day crossings up 28.5% and overnight crossings up 14.8%), and travel to overseas countries grew 11.2%.
- Employment in Ontario's tourism-related industries increased by 3.5%.
- Ontario's Travel Price Index increased by 0.8%.

YTD July 2010 versus YTD July 2009:

- U.S. crossings to Ontario decreased 6.4%, with same-day crossings down 10.2% and overnight crossings down 2.5%.
- Crossings from overseas markets to Ontario grew 5.3%.
- Ontarians' crossings to the U.S. grew by 12.7% (same-day visits up 15.6% and overnight entries up 8.7%), and travel to overseas countries increased 6.0%.

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Tourism Industry Statistics

Border Crossings

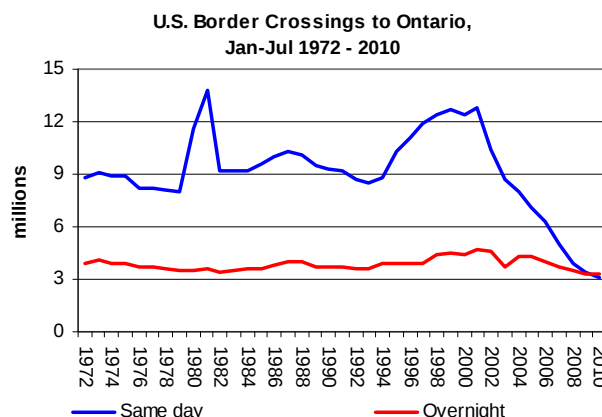
Total International Entries

In July 2010, there were 1.9 million (U.S. and overseas) border crossings into Ontario, an increase of 7.6% compared to July 2009. In 2009, July accounted for 13.6% of Ontario's annual international border crossings.

For the first 7 months of 2010, total international border crossings declined by 5.0% over 2009 to 7.3 million entries.

U.S. Entries

U.S. entries accounted for 87% of international entries into Ontario in July 2010. During this month, U.S. border crossings into Ontario grew 7.8% over July 2009 to 1.7 million crossings. Same-day entries increased 9.1% and overnight entries rose 7.0%.



Source: Statistics Canada

During the first 7 months of 2010, there were 6.3 million border crossings from the U.S. to Ontario, a decrease of 6.4% over 2009. Same-day crossings declined 10.2% with 346,000 fewer crossings and overnight crossings dropped 2.5% or 83,000 fewer crossings.

In July 2010, U.S. entries grew to all regions with Ontario reporting the largest growth at 7.8%. During the first 7 months of 2010, U.S. entries to Ontario declined while entries to B.C. grew. Ontario accounted for 54% of U.S. entries into Canada in July 2010.

Province	U.S. Entries, Jul 2010 over Jul 2009		U.S. Entries, YTD Jul 2010 over YTD Jul 2009	
	Entries*	% change	Entries*	% change
Canada	3,068,712	6.0%	11,558,977	-3.0%
B.C.	682,872	4.8%	2,602,615	2.6%
Ontario	1,660,535	7.8%	6,312,442	-6.4%
Quebec	275,908	3.4%	1,157,657	0.1%

Source: Statistics Canada

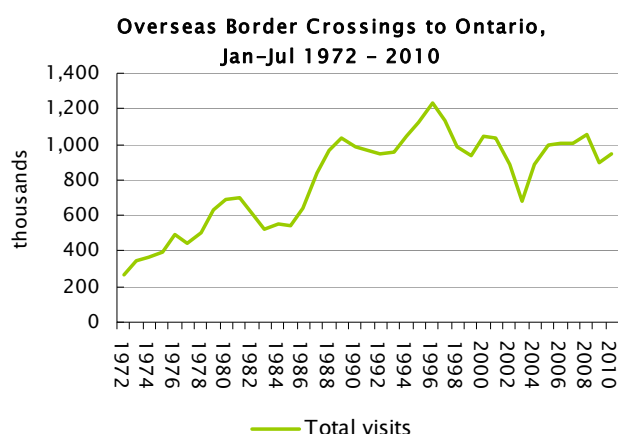
U.S. Entries: Mode of Transportation

In July 2010, 82% of U.S. entries to Ontario were via automobile, 11% by commercial air travel¹, 3% by bus and 4% by other modes. Entries by automobile were up 7.0% in July 2010 but down 8.9% for the 7 months ending July 2010 compared with 2009. Commercial air travel from the U.S. was up 10.2% in July 2010 and entries by bus grew 24.3%.

Overseas Entries

In July 2010, the 248,000 overseas entries into Ontario accounted for 13.0% of the province's total international entries, an increase of 6.4% compared to July 2009. July accounted for 14.6% of overseas entries in 2009.

During the first 7 months of 2010, overseas entries to Ontario grew 5.3% over 2009.



Source: Statistics Canada

¹ Commercial Air Travel represents 96% of all air travel

In July 2010, overseas entries increased to all regions. Similarly, all regions in Canada experienced growth in overseas entries in Jan-Jul 2010 with B.C. entries up the most at 8.4%. Ontario accounted for 37% of Canada's overseas entries during July 2010.

Province	Overseas Entries, Jul 2010 over Jul 2009		Overseas Entries, YTD Jul 2010 over YTD Jul 2009	
	Entries*	% change	Entries*	% change
Canada	665,011	7.6%	2,528,970	5.9%
B.C.	213,523	11.8%	851,413	8.4%
Ontario	247,979	6.4%	947,784	5.3%
Quebec	128,594	7.4%	455,546	6.0%

Source: Statistics Canada

Overseas Entries: Traditional Markets

In July 2010, arrivals from all traditional markets grew. Arrivals from Japan were up 20%, entries from France increased 14% and arrivals from Germany grew 5% over July 2009.

During Jan-Jul 2010, arrivals from Japan were up 42%, entries from Germany grew 7%, and arrivals from France increased 2.5% while arrivals from the U.K. declined compared to 2009.

Market	Jul 2010 over Jul 2009		YTD Jul 2010 over YTD Jul 2009	
	Entries*	% change	Entries*	% change
U.K.	41,235	0.2%	160,312	-2.5%
Germany	16,157	4.8%	68,231	7.3%
Japan	8,334	20.0%	42,545	41.6%
France	11,085	14.2%	38,719	2.5%

Source: Statistics Canada

Overseas Entries: Emerging Markets

Arrivals from most overseas countries grew in July 2010 compared to July 2009 with entries from China up 51% and arrivals from India up 35%. During the first 7 months of 2010, arrivals were up from all reported countries except Mexico (-41%), and the Netherlands (-8%). Entries from India increased 29%, and arrivals from China were up 25% in Jan-July 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.



Tourism Performance Bulletin

Ministry of Tourism and Culture

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Market	Jul 2010 over Jul 2009		YTD Jul 2010 over YTD Jul 2009	
	Entries*	% change	Entries*	% change
India	7,757	34.6%	40,955	29.3%
China	10,063	51.3%	37,179	25.1%
Brazil	7,354	25.4%	32,588	22.3%
South Korea	7,649	-10.7%	31,943	13.6%
Mexico	7,735	-28.5%	28,166	-40.9%
Italy	8,289	3.5%	27,080	3.8%
Australia	5,439	4.8%	24,589	7.3%
Hong Kong	5,975	17.7%	22,513	18.6%
Netherlands	7,797	1.9%	22,494	-7.7%

Source: Statistics Canada

Outbound Travel

Total International Travel

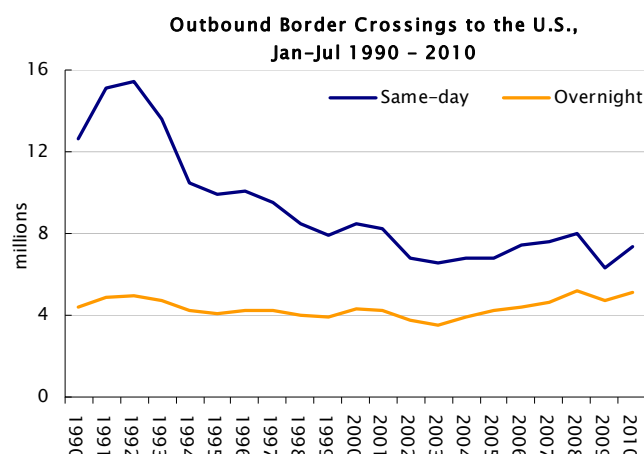
During July 2010, Ontarians made 2.4 million international border crossings (U.S. and overseas), an increase of 20.8% versus July 2009.

Total international border crossings by Ontarians increased 11.4% to 15.0 million crossings during Jan-Jul 2010 compared to 2009.

Ontario continues to generate more visitors to international destinations than it receives: in Jan-Jul 2010, there were 7.3 million international entries into Ontario compared to 15.0 million international border crossings made by Ontarians.

Travel to the U.S.

In July 2010, travel to the U.S. accounted for 87% of Ontario's international visits. Ontario residents made 2.1 million entries into the U.S. in July 2010, 22.4% more than in July 2009. Same-day visits, which represented 58% of entries, grew 28.5% while overnight visits increased 14.8%.



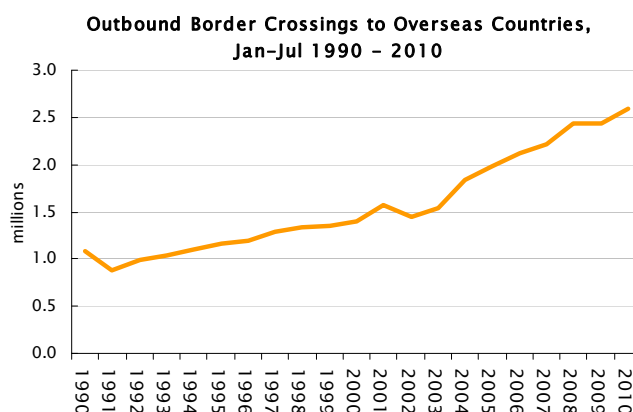
Source: Statistics Canada

During the first 7 months of 2010, there were 12.4 million border crossings from Ontario to the U.S., an increase of 12.7% over 2009. Same-day visits grew 15.6% or 990,000 entries and overnight visits increased 8.7% or 407,000 entries compared to 2009.

Travel to Overseas Countries

In July 2010, overseas travel represented 13% of Ontario residents' international border crossings with 316,000 crossings. Travel to overseas countries grew 11.2% in July 2010 compared to July 2009.

During Jan-Jul 2010, Ontarians made 2.6 million overseas crossings, up 6.0% from 2009.



Source: Statistics Canada



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Accommodation

Occupancy Rates

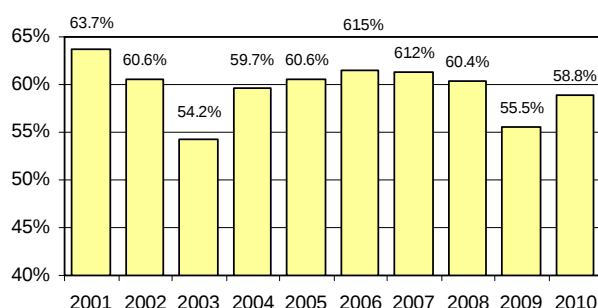
In July 2010, the occupancy rate at Ontario hotels was 69.4%, up 6.8 percentage points over July 2009.

North Western Ontario reported occupancy of 83.2% and downtown Toronto recorded occupancy of 82.3%. Compared to July 2009, occupancy was up in all regions.

During the first 7 months of 2010, hotel occupancy in Ontario was 58.8%, up 3.3 percentage points compared to 2009.

The GTA, Ottawa, and North Western Ontario all posted a 7 month occupancy rate over 65%. Occupancy rates increased in all regions other than Eastern Ontario, and North Eastern Ontario where they declined slightly in Jan-Jul 2010 compared to 2009.

Ontario Hotel Occupancy Rates,
Jan-Jul 2001-2010



Source: PKF Consulting, Hotel Trends

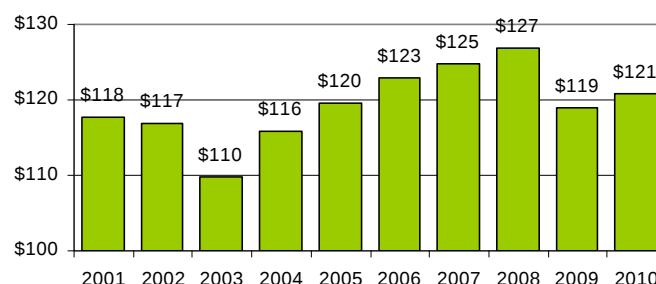
Average Daily Rates

The average daily rate (ADR) grew 3.0% in July 2010 to \$121.09.

In July 2010, ADR was highest in Niagara Falls at \$164.78 and lowest in Windsor at \$92.15. Eastern and North Western Ontario reported a small decline while all other regions grew ADR compared to the previous year.

During Jan-Jul 2010, Ontario ADR was up 1.6% to \$120.75 compared to Jan-Jul 2009. Year-to-date ADR was up in the GTA, Central and Northern Ontario.

Ontario Hotel ADRs,
Jan-Jul 2001-2010



Source: PKF Consulting, Hotel Trends

Revenue per Available Room

Revenue per available room (revPAR) was \$84.03 in July 2010, up 14.3% over July 2009. During January-July 2010, revPAR grew 7.6% to \$71.03 compared to January-July 2009.

Travel Price Index (TPI)

Ontario's TPI grew 0.8% in July 2010 compared to July 2009. Increased costs of transportation, recreation and food & beverage drove the growth. This compares to a 2.9% increase in the Ontario Consumer Price Index (CPI).

During the first 7 months of 2010, the Ontario TPI grew 0.3% compared to 2009 while Ontario's CPI increased 2.0%.

Ontario Index	Jul 2010 over Jul 2009	YTD Jul 2010 over YTD Jul 2009
TPI	0.8%	0.3%
CPI	2.9%	2.0%

Source: Statistics Canada, Ontario Ministry of Tourism and Culture

The U.S. Travel Price Index for July 2010 was up 3.3% over July 2009 while the U.S. CPI was up 1.1%.

U.S. Index	Jul 2010 over Jul 2009
TPI	+3.3%
CPI	+1.1%

Source: Travel Industry Association of America

Economic Indicators

Consumer Confidence

The Canadian Index of Consumer Confidence dropped 3.7 points in July 2010 to 80.0 (2002 = 100). The balance of opinion declined on all four components, especially employment.

Confidence decreased in all regions, especially B.C. and the Atlantic provinces. It dropped the least in Ontario, down 1.2 points to 72.7.

Region	Jul 2010	Point change Jul 2010 vs Jun 2010
Canada	80.0	-3.7
B.C.	78.9	-12.5
Prairie provinces	93.7	-4.8
Ontario	72.7	-1.2
Quebec	81.0	-2.1
Atlantic provinces	83.5	-7.5

Source: The Conference Board of Canada

The U.S. Consumer Confidence Index dropped 3.9 points in July 2010 and now stands at 50.4 (1985=100).

Source: The Conference Board of Canada

Employment

In July 2010, employment in Ontario's tourism-related industries grew 3.5% compared to July 2009. This compares to a 2.5% increase in total employment in Ontario.

Ontario Employment	Jul 2010 over Jul 2009	YTD Jul 2010 over YTD Jul 2009
Tourism Employment	3.5%	2.1%
Total Employment	2.5%	1.5%

During the first 7 months of 2010, tourism-related employment increased 2.1% versus 2009. Growth in the Travel Arrangements, Amusement/Recreation, and Accommodation/Food Service industries was offset by declines in other areas.

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

Consumer Response Indicators

1-800-ONTARIO

There were approximately 49,000 calls to the 1-800-ONTARIO call centre in July 2010, an increase of 91.3% over July 2009.

Throughout the first 7 months of 2010, there were about 140,000 calls, an increase of 60.1% 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

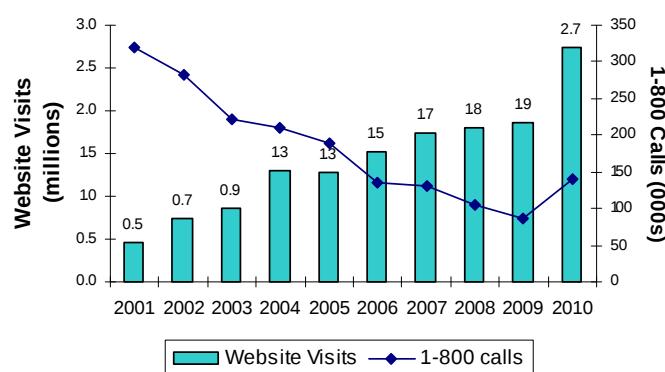
OntarioTravel.net

In July 2010, there were approximately 501,000 user sessions on www.ontariotravel.net, Ontario's travel website, an increase of 34.2% in the number of user sessions on the main website compared to July 2009.

During Jan-Jul 2010, there were approximately 2.7 million user sessions on the main site of the province's travel website, up 47.8% 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-Jul 2001-2010



Source: Ontario Tourism Marketing Partnership Corporation



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Ontario Travel Information Centres

Visits to Ontario's Travel Information Centres (TICs) totalled about 194,000 in July 2010, a decrease of 12.2% over July 2009.

During the first 7 months of 2010, there were approximately 553,000 visits to Ontario TICs, 4.6% less than in 2009.

Change in Visits to Ontario's TICs		
Location	Jul 2010 over Jul 2009	YTD Jul 2010 over YTD Jul 2009
Bainsville	100.0%	100.0%
Barrie	2.6%	-0.8%
Cornwall	5.1%	-10.9%
Fort Erie	-12.4%	-23.0%
Fort Frances	23.7%	14.2%
Niagara Falls	-3.7%	-3.6%
Sarnia	-5.7%	1.3%
Sault Ste. Marie	13.2%	20.0%
St. Catharines	-4.3%	-8.7%
Tilbury	100.0%	100.0%
Toronto	-11.8%	-8.7%
Windsor Park	-16.9%	-20.4%
Windsor HC	-30.0%	-21.2%
Hill Island	-0.7%	-3.9%
Kenora	7.1%	3.3%
Lancaster	-100.0%	-64.9%
Pigeon River	14.4%	27.6%
Prescott	23.1%	13.1%
Rainy River	-43.2%	-33.5%
417	4.3%	2.4%
TOTAL	-12.2%	-4.6%

Source: Ontario Ministry of Tourism and Culture

The Bainsville and Tilbury centres opened July 1, 2010 while the Lancaster centre closed June 30, 2010. Also Windsor Huron operated with reduced hours in July 2010.

Attendance at Agencies

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

Change in Visits to Ontario's Agencies		
Agency	Jul 2010 over Jul 2009	YTD Jul 2010 over YTD Jul 2009
AGO	-25%	+25%
Fort William Historical Park	-25%	-28%
Huron Historical Parks	-23%	-14%
McMichael Gallery	-23%	-23%
Niagara Parks Commission ²	+3%	0%
Ontario Heritage Trust	+17%	+13%
Ontario Place	+11%	0%
Ontario Science Centre	+4%	+12%
Royal Botanical Gardens	-15%	-13%
Royal Ontario Museum	-3%	-15%
Science North	-16%	+2%
St Lawrence Parks ³	-2%	-5%

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