

NOVEMBER 2010

Highlights

November 2010 over November 2009:

- Crossings from the U.S. to Ontario grew 1.4%, with same-day crossings down 2.4% and overnight crossings up 6.5%.
- Crossings from overseas markets to Ontario increased by 8.4%.
- Crossings by Ontarians to the U.S. increased by 10.9% (same-day crossings up 12.6% and overnight crossings up 8.2%), and travel to overseas countries grew 13.9%.
- Employment in Ontario's tourism-related industries increased by 2.0%.
- Ontario's Travel Price Index increased by 4.2%.

YTD November 2010 versus YTD November 2009:

- U.S. crossings to Ontario decreased 3.6%, with same-day crossings down 6.3% and overnight crossings down 0.9%.
- Crossings from overseas markets to Ontario grew 6.1%.
- Ontarians' crossings to the U.S. grew by 12.2% (same-day visits up 14.4% and overnight entries up 9.0%), and travel to overseas countries increased 8.2%.

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Border Crossings

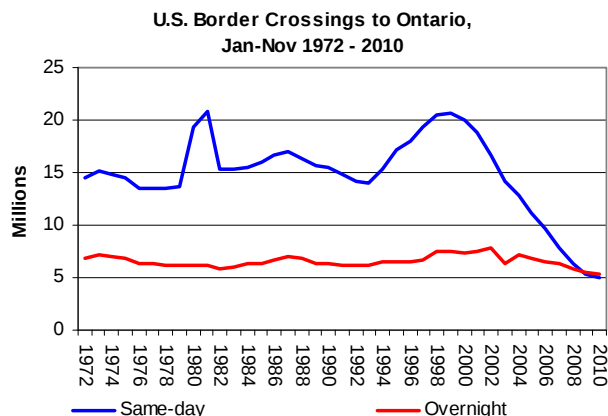
Total International Entries

In November 2010, there were 769,000 (U.S. and overseas) border crossings into Ontario, an increase of 2.1% compared to November 2009. In 2009, November accounted for 5.8% of Ontario's annual international border crossings.

For the first 11 months of 2010, total international border crossings declined by 2.4% over 2009 to 11.9 million entries.

U.S. Entries

U.S. entries accounted for 90% of international entries into Ontario in November 2010. During this month, U.S. border crossings into Ontario grew 1.4% over November 2009 to 688,000 crossings. Same-day entries decreased 2.4% while overnight entries grew 6.5%.



Source: Statistics Canada

During the first 11 months of 2010, there were 10.4 million border crossings from the U.S. to Ontario, a decrease of 3.6% over 2009. Same-day crossings declined 6.3% with 335,000 fewer crossings and overnight crossings dropped 0.9% or 48,000 fewer crossings.

In November 2010, U.S. entries grew to all regions of Canada with Quebec reporting the largest growth at 3.9%. During the first 11 months of 2010, U.S. entries to B.C. and Quebec grew while entries to Ontario declined. Ontario accounted for 60% of U.S. entries into Canada in November 2010.

Province	U.S. Entries, Nov 2010 over Nov 2009		U.S. Entries, YTD Nov 2010 over YTD Nov 2009	
	Entries*	% change	Entries*	% change
Canada	1,141,661	1.2%	18,944,051	-1.5%
B.C.	196,342	2.7%	4,109,228	1.8%
Ontario	688,498	1.4%	10,352,726	-3.6%
Quebec	129,170	3.9%	1,919,493	0.4%

Source: Statistics Canada

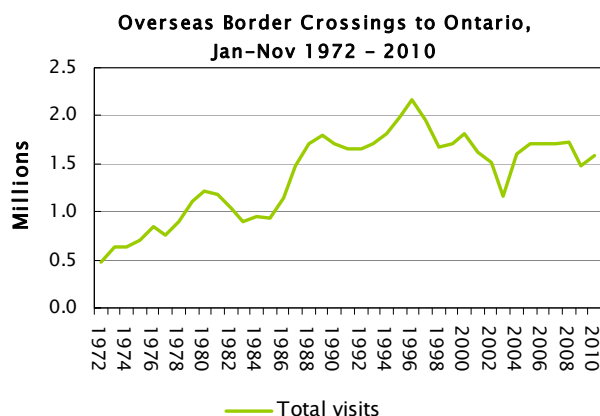
U.S. Entries: Mode of Transportation

In November 2010, 78% of U.S. entries to Ontario were via automobile, 17% by commercial air travel¹, 4% by bus and 1% by other modes. Entries by automobile were down 0.6% in November 2010 and down 5.9% for the 11 months ending November 2010 compared with 2009. Commercial air travel from the U.S. was up 14.3% in November 2010 and entries by bus declined 4.4%.

Overseas Entries

In November 2010, the 80,000 overseas entries into Ontario accounted for 10.4% of the province's total international entries, an increase of 8.4% compared to November 2009. November accounted for 4.6% of overseas entries in 2009.

During the first 11 months of 2010, overseas entries to Ontario grew 6.1% over 2009.



Source: Statistics Canada

¹ Commercial Air Travel represents 96% of all air travel

In November 2010, overseas entries increased to all regions of Canada. All regions also experienced growth in overseas entries in Jan-Nov 2010 with B.C. entries up the most at 9.3%. Ontario accounted for 44% of Canada's overseas entries during November 2010.

Province	Overseas Entries, Nov 2010 over Nov 2009		Overseas Entries, YTD Nov 2010 over YTD Nov 2009	
	Entries*	% change	Entries*	% change
Canada	183,166	4.6%	4,172,653	7.0%
B.C.	54,422	0.3%	1,346,266	9.3%
Ontario	80,284	8.4%	1,575,981	6.1%
Quebec	35,675	11.9%	786,269	6.5%

Source: Statistics Canada

Overseas Entries: Traditional Markets

In November 2010, arrivals from the U.K. grew 7%, and arrivals from Japan increased 1% over November 2009.

During Jan-Nov 2010, arrivals from Japan were up 18%, entries from France grew 8%, and arrivals from Germany increased 5% while arrivals from the U.K. declined 1% compared to 2009.

Market	Nov 2010 over Nov 2009		YTD Nov 2010 over YTD Nov 2009	
	Entries*	% change	Entries*	% change
U.K.	13,326	6.7%	272,207	-0.8%
Germany	4,499	-3.7%	115,738	5.1%
Japan	4,400	-8.7%	77,346	18.3%
France	2,823	1.0%	75,185	8.4%

Source: Statistics Canada

Overseas Entries: Emerging Markets

Arrivals from most overseas countries grew in November 2010 compared to November 2009 with entries from China up 42%, arrivals from Brazil up 39%, and entries from Hong Kong up 32%.

During the first 11 months of 2010, arrivals were up from all reported countries except Mexico (-30%), and the Netherlands (-7%). Entries from India and Brazil increased 26% and arrivals from China were up 24% in Jan-Nov 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	Nov 2010 over Nov 2009		YTD Nov 2010 over YTD Nov 2009	
	Entries*	% change	Entries*	% change
China	4,438	41.8%	66,566	23.7%
India	3,038	11.2%	63,342	26.5%
Brazil	2,665	38.8%	51,509	25.5%
South Korea	2,333	-3.0%	48,625	4.5%
Italy	2,321	-2.2%	48,180	3.0%
Mexico	1,504	3.0%	41,841	-30.0%
Australia	2,376	10.1%	41,220	10.9%
Netherlands	1,564	3.7%	36,589	-7.2%
Hong Kong	2,221	32.4%	35,036	18.7%

Source: Statistics Canada

Outbound Travel

Total International Travel

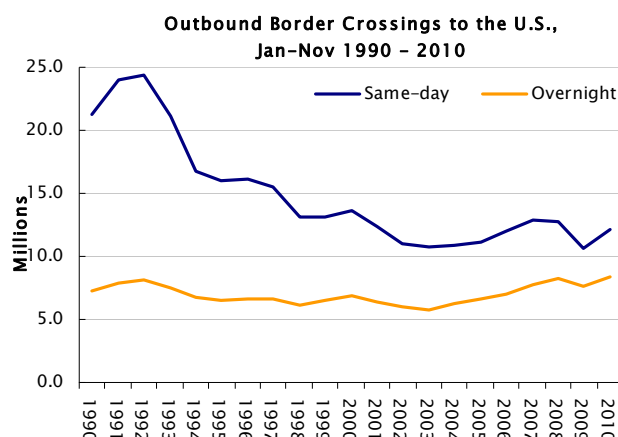
During November 2010, Ontarians made 2.2 million international border crossings (U.S. and overseas), an increase of 11.3% versus November 2009.

Total international border crossings by Ontarians increased 11.5% to 24.3 million crossings during Jan-Nov 2010 compared to 2009.

Ontario continues to generate more visitors to international destinations than it receives: in Jan-Nov 2010, there were 11.9 million international entries into Ontario compared to 24.3 million international border crossings made by Ontarians.

Travel to the U.S.

In November 2010, travel to the U.S. accounted for 87% of Ontarian's international visits. Ontario residents made 1.9 million entries into the U.S. in November 2010, 10.9% more than in November 2009. Same-day visits, which represented 62% of entries, grew 12.6% while overnight visits increased 8.2%.



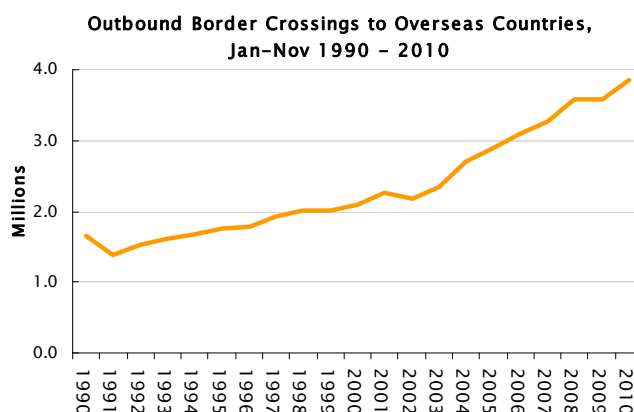
Source: Statistics Canada

During the first 11 months of 2010, there were 20.4 million border crossings from Ontario to the U.S., an increase of 12.2% over 2009. Same-day visits grew 14.4% or 1.5 million entries and overnight visits increased 9.0% or 689,000 entries compared to 2009.

Travel to Overseas Countries

In November 2010, overseas travel represented 13% of Ontario resident's international border crossings with 285,000 crossings. Travel to overseas countries grew 13.9% in November 2010 compared to November 2009.

During Jan-Nov 2010, Ontarians made 3.9 million overseas crossings, up 8.2% from 2009.



Source: Statistics Canada

Accommodation

Occupancy Rates

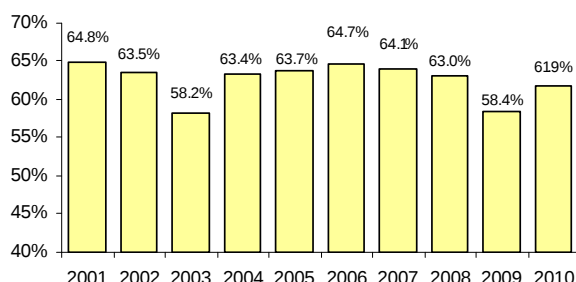
In November 2010, the occupancy rate at Ontario hotels was 60.3%, up 4.6 percentage points over November 2009.

Downtown Toronto, Ottawa and Thunder Bay all reported occupancy rates over 70%. Compared to November 2009, occupancy was up in all regions except North Central and North Eastern Ontario.

During the first 11 months of 2010, hotel occupancy in Ontario was 61.9%, up 3.3 percentage points compared to 2009.

The GTA, Ottawa, and North Western Ontario all posted a 11 month occupancy rate over 67%. Occupancy rates increased in all regions other than North Eastern Ontario where they declined 1.3% in Jan-Nov 2010 compared to 2009.

Ontario Hotel Occupancy Rates,
Jan-Nov 2001-2010



Source: PKF Consulting, Hotel Trends

Average Daily Rates

The average daily rate (ADR) grew 2.1% in November 2010 to \$119.67.

In November 2010, ADR was highest in downtown Toronto at \$157.65 and lowest in Sault Ste. Marie at \$92.99. Southern Ontario reported a decline in ADR while all other regions grew ADR compared to the previous year.

During Jan-Nov 2010, Ontario ADR was up 1.4% to \$121.60 compared to Jan-Nov 2009. Year-to-date ADR was up in the GTA, Central and Northern Ontario.

Ontario Hotel ADRs,
Jan-Nov 2001-2010



Source: PKF Consulting, Hotel Trends

Revenue per Available Room

Revenue per available room (revPAR) was \$72.18 in November 2010, up 10.4% over November 2009. During January-November 2010, revPAR grew 7.1% to \$75.23 compared to January-November 2009.

Travel Price Index (TPI)

Ontario's TPI grew 4.2% in November 2010 compared to November 2009. Increased costs of transportation, accommodations and food & beverage drove the growth. This compares to a 3.0% increase in the Ontario Consumer Price Index (CPI).

During the first 11 months of 2010, the Ontario TPI grew 0.8% compared to 2009 while Ontario's CPI increased 2.4%.

Ontario Index	Nov 2010 over Nov 2009	YTD Nov 2010 over YTD Nov 2009
TPI	4.2%	0.8%
CPI	3.0%	2.4%

Source: Statistics Canada, Ontario Ministry of Tourism and Culture

The U.S. Travel Price Index for November 2010 was up 2.4% over November 2009 while the U.S. CPI remained unchanged.

U.S. Index	Nov 2010 over Nov 2009	YTD Nov 2010 over YTD Nov 2009
TPI	2.4%	3.9%
CPI	0%	1.7%

Source: Travel Industry Association of America

Economic Indicators

Consumer Confidence

The Canadian Index of Consumer Confidence grew 3.9 points in November 2010 to 83.6 (2002 = 100). This gain was led by a more hopeful outlook for future finances and the anticipation of increased job creation going forward.

Confidence increased in all regions except the Prairie Provinces and Quebec. It grew 8.0 points in Ontario based on more optimism towards employment.

Region	Nov 2010	Point change Nov 2010 vs Oct 2010
Canada	83.6	+3.9
B.C.	94.5	+11.5
Prairie provinces	98.3	-1.0
Ontario	76.8	+8.0
Quebec	78.1	-2.8
Atlantic provinces	83.6	+3.4

Source: The Conference Board of Canada

The U.S. Consumer Confidence Index increased 4.1 points in November 2010 and now stands at 54.3 (1985=100).

Source: The Conference Board of Canada

Employment

In November 2010, employment in Ontario's tourism-related industries grew 2.0% compared to November 2009. This compares to a 2.8% increase in total employment in Ontario.

Ontario Employment	Nov 2010 over Nov 2009	YTD Nov 2010 over YTD Nov 2009
Tourism Employment	2.0%	2.3%
Total Employment	2.8%	1.7%

During the first 11 months of 2010, tourism-related employment increased 2.3% 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 1,600 calls to the 1-800-ONTARIO call centre in November 2010, a decrease of 32.7% over November 2009.

Throughout the first 11 months of 2010, there were about 182,000 calls, an increase of 50.9% 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

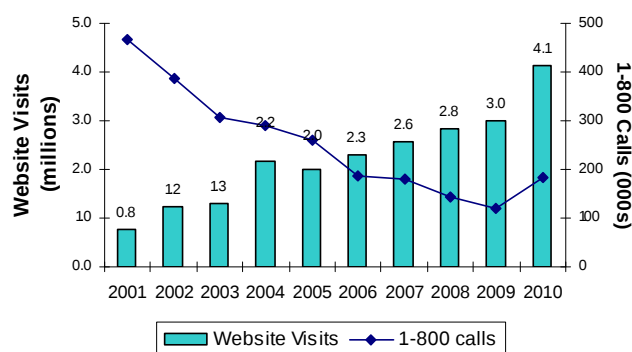
OntarioTravel.net

In November 2010, there were approximately 281,000 user sessions on www.ontariotravel.net, Ontario's travel website, an increase of 21.9% in the number of user sessions on the main website compared to November 2009.

During Jan-Nov 2010, there were approximately 4.1 million user sessions on the main site of the province's travel website, up 37.3% 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-Nov 2001-2010



Source: Ontario Tourism Marketing Partnership Corporation

Ontario Travel Information Centres

Visits to Ontario's Travel Information Centres (TICs) totalled about 36,000 in November 2010, an increase of 9.8% over November 2009.

During the first 11 months of 2010, there were approximately 965,000 visits to Ontario TICs, 0.4% less than in 2009.

Change in Visits to Ontario's TICs		
Location	Nov 2010 over Nov 2009	YTD Nov 2010 over YTD Nov 2009
Bainsville	100.0%	100.0%
Barrie	-2.4%	1.4%
Cornwall	11.4%	-6.2%
Fort Erie	5.6%	-17.3%
Fort Frances	18.9%	8.7%
Niagara Falls	3.1%	-4.9%
Sarnia	8.5%	4.7%
Sault Ste. Marie	-15.8%	14.7%
St. Catharines	-15.3%	-7.9%
Tilbury	100.0%	100.0%
Toronto	-5.6%	-12.2%
Windsor Park	-10.3%	-17.2%
Windsor HC	Closed for season	-28.0%
Hill Island	Closed for season	-1.4%
Kenora	Closed for season	2.9%
Lancaster	Closed for season	-82.4%
Pigeon River	Closed for season	17.4%
Prescott	Closed for season	8.5%
Rainy River	Closed for season	-24.0%
417	Closed for season	2.9%
TOTAL:	9.8%	-0.4%

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 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	Nov 2010 over Nov 2009	YTD Nov 2010 over YTD Nov 2009
AGO	-40%	+8%
Fort William Historical Park	+14%	-32%
Huron Historical Parks	-1%	-8%
McMichael Gallery	-2%	-16%
Niagara Parks Commission ²	-15%	0%
Ontario Heritage Trust	-40%	-6%
Ontario Place	-31%	-12%
Ontario Science Centre	-46%	+2%
Royal Botanical Gardens	-12%	-12%
Royal Ontario Museum	-8%	-12%
Science North	+1%	+3%
St Lawrence Parks ³	+131%	-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