

JANUARY 2011

Highlights

January 2011 over January 2010:

- Crossings from the U.S. to Ontario declined 6.2%, with same-day crossings down 9.9% and overnight crossings down 0.5%.
- Crossings from overseas markets to Ontario increased by 9.7%.
- Crossings by Ontarians to the U.S. increased by 9.6% (same-day crossings up 11.6% and overnight crossings up 3.4%), and travel to overseas countries grew 6.8%.
- Ontario's Travel Price Index increased by 4.2%.

2010 versus 2009:

- U.S. crossings to Ontario decreased 3.5%, with same-day crossings down 6.2% and overnight crossings down 0.9%.
- Crossings from overseas markets to Ontario grew 6.0%.
- Ontarians' crossings to the U.S. grew by 12.3% (same-day visits up 14.7% and overnight entries up 8.9%), and travel to overseas countries increased 8.3%.

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Tourism Industry Statistics

Border Crossings

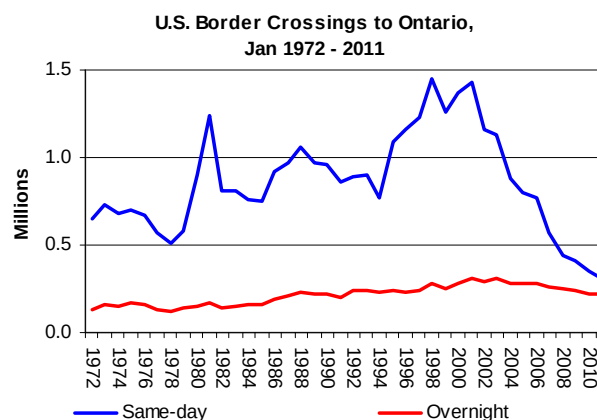
Total International Entries

In January 2011, there were 616,000 (U.S. and overseas) border crossings into Ontario, a decrease of 4.4% compared to January 2010. In 2010, January accounted for 5.0% of Ontario's annual international border crossings.

During 2010, total international border crossings declined by 2.4% over 2009 to 12.8 million entries.

U.S. Entries

U.S. entries accounted for 86% of international entries into Ontario in January 2011. During this month, U.S. border crossings into Ontario declined 6.2% over January 2010 to 533,000 crossings. Same-day entries decreased 9.9% while overnight entries dropped 0.5%.



Source: Statistics Canada

In 2010, there were 11.1 million border crossings from the U.S. to Ontario, a decrease of 3.5% over 2009. Same-day crossings declined 6.2% with 354,000 fewer crossings and overnight crossings dropped 0.9% or 53,000 fewer crossings.

In January 2011, U.S. entries decline to all regions of Canada. During 2010, U.S. entries to B.C. and Quebec grew while entries to Ontario declined. Ontario accounted for 57% of U.S. entries into Canada in January 2011.

Province	U.S. Entries, Jan 2011 over Jan 2010		U.S. Entries, 2010 over 2009	
	Entries*	% change	Entries*	% change
Canada	934,429	-4.8%	20,213,499	-1.5%
B.C.	195,024	-1.9%	4,373,377	1.8%
Ontario	532,766	-6.3%	11,071,101	-3.5%
Quebec	103,157	-0.2%	2,066,929	0.5%

Source: Statistics Canada

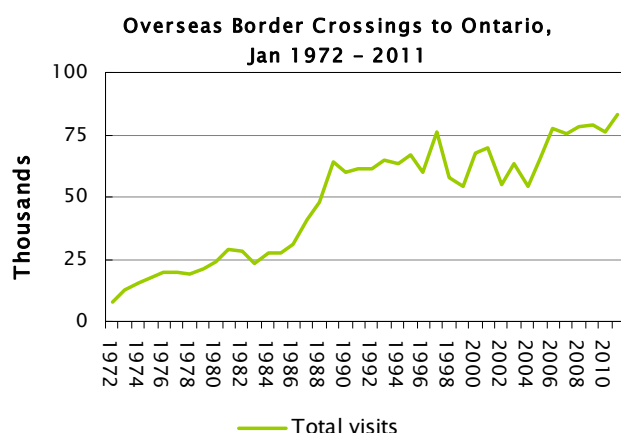
U.S. Entries: Mode of Transportation

In January 2011, 75% of U.S. entries to Ontario were via automobile, 18% by commercial air travel¹, 6% by bus and 1% by other modes. Entries by automobile were down 10.1% in January 2011 and down 5.8% for the year 2010 compared with 2009. Commercial air travel from the U.S. was up 14.7% in January 2011 and entries by bus declined 9.6%.

Overseas Entries

In January 2011, the 83,000 overseas entries into Ontario accounted for 14% of the province's total international entries, an increase of 9.7% compared to January 2010. January accounted for 4.5% of overseas entries in 2010.

During 2010, overseas entries to Ontario grew 6.0% over 2009.



Source: Statistics Canada

¹ Commercial Air Travel represents 96% of all air travel

In January 2011, overseas entries increased to all regions of Canada. All regions also experienced growth in overseas entries in Jan-Dec 2010 with B.C. entries up the most at 9.1%. Ontario accounted for 40% of Canada's overseas entries during January 2011.

Province	Overseas Entries, Jan 2011 over Jan 2010		Overseas Entries, 2010 over 2009	
	Entries*	% change	Entries*	% change
Canada	208,365	4.5%	4,455,634	6.8%
B.C.	70,809	6.8%	1,432,929	9.1%
Ontario	83,402	9.7%	1,692,956	6.0%
Quebec	37,891	7.9%	842,745	6.8%

Source: Statistics Canada

Overseas Entries: Traditional Markets

In January 2011, arrivals from Japan grew 15.2%, entries from the U.K. increased 9.6% while all other traditional markets declined over January 2010.

During Jan-Dec 2010, arrivals from Japan were up 17%, entries from France grew 8%, and arrivals from Germany increased 4% while arrivals from the U.K. declined 1% compared to 2009.

Market	Jan 2011 over Jan 2010		2010 over 2009	
	Entries*	% change	Entries*	% change
U.K.	12,219	9.6%	291,020	-1.2%
Germany	4,651	-12.7%	121,609	4.1%
Japan	3,339	15.2%	81,666	17.0%
France	3,267	-10.2%	79,547	8.0%

Source: Statistics Canada

Overseas Entries: Emerging Markets

Arrivals from most overseas countries grew in January 2011 compared to January 2010 with arrivals from Hong Kong up 79%, entries from China up 67%, and entries from Australia up 23%.

During 2010, arrivals were up from all reported countries except Mexico (-29%), and the Netherlands (-8%). Entries from India increased 26% and arrivals from China and Brazil were each up 25% in 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	Jan 2011 over Jan 2010		2010 over 2009	
	Entries*	% change	Entries*	% change
China	5,410	66.7%	71,835	25.2%
India	4,065	4.8%	68,086	26.5%
Brazil	5,759	5.7%	57,774	25.0%
South Korea	3,366	4.4%	52,431	4.1%
Italy	1,631	-10.8%	51,236	3.1%
Australia	2,524	23.1%	45,612	11.9%
Mexico	2,524	-5.0%	44,331	-28.6%
Netherlands	1,391	1.9%	38,664	-7.5%
Hong Kong	2,491	79.1%	38,174	19.4%

Source: Statistics Canada

Outbound Travel

Total International Travel

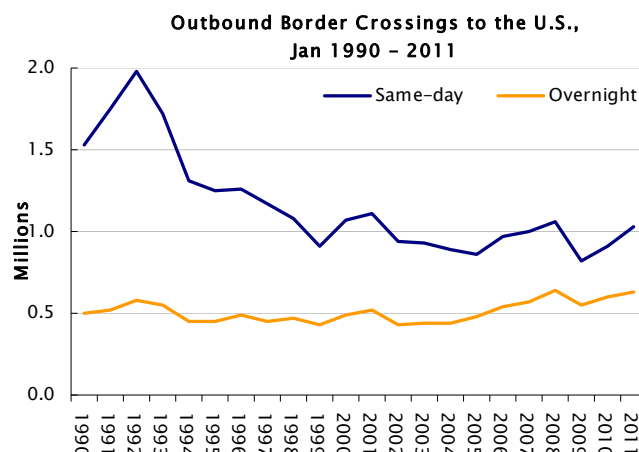
During January 2011, Ontarians made 2.2 million international border crossings (U.S. and overseas), an increase of 9.0% versus January 2010.

Total international border crossings by Ontarians increased 11.7% to 26.5 million crossings during Jan-Dec 2010 compared to 2009.

Ontario continues to generate more visitors to international destinations than it receives: in 2010, there were 12.8 million international entries into Ontario compared to 26.5 million international border crossings made by Ontarians.

Travel to the U.S.

In January 2011, travel to the U.S. accounted for 77% of Ontarian's international visits. Ontario residents made 1.7 million entries into the U.S. in January 2011, 9.6% more than in January 2010. Same-day visits, which represented 60% of entries, grew 11.6% while overnight visits increased 3.4%.



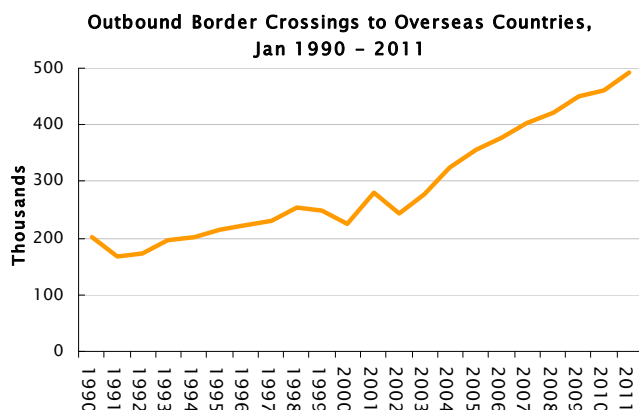
Source: Statistics Canada

In 2010 there were 22.3 million border crossings from Ontario to the U.S., an increase of 12.3% over 2009. Same-day visits grew 14.7% or 1.7 million entries and overnight visits increased 8.9% or 727,000 entries compared to 2009.

Travel to Overseas Countries

In January 2011, overseas travel represented 23% of Ontario resident's international border crossings with 493,000 crossings. Travel to overseas countries grew 6.8% in January 2011 compared to January 2010.

During Jan-Dec 2010, Ontarians made 4.2 million overseas crossings, up 8.3% from 2009.



Source: Statistics Canada

Accommodation

NOTE: January 2011 data from PKF Consulting is not available but will be combined with February 2011 data and reported in the February 2011 edition of the Tourism Performance Bulletin.

Occupancy Rates

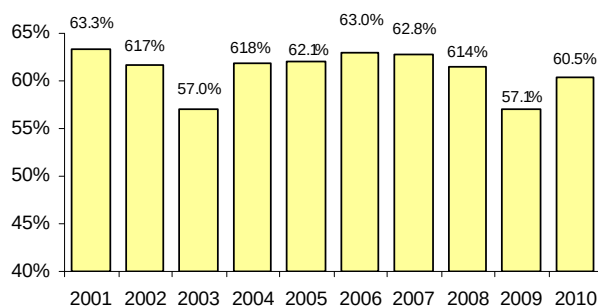
In December 2010, the occupancy rate at Ontario hotels was 45.1%, up 2.2 percentage points over December 2009.

The Greater Toronto Area (GTA), Ottawa and North Western Ontario all reported occupancy rates over 50%. Compared to December 2009, occupancy was up in all regions except North Central and North Eastern Ontario.

In 2010 hotel occupancy in Ontario was 60.5%, up 3.3 percentage points compared to 2009.

The GTA, Ottawa, and North Western Ontario all posted a 12 month occupancy rate over 66%. Downtown Toronto had the highest annual rate at 74%. Occupancy rates increased in all regions other than North Eastern and North Central Ontario where they declined slightly in Jan-Dec 2010 compared to Jan-Dec 2009.

Ontario Hotel Occupancy Rates,
Jan-Dec 2001-2010



Source: PKF Consulting, Hotel Trends

Average Daily Rates (ADR)

The average daily rate (ADR) grew 0.9% in December 2010 to \$113.70.

In December 2010, ADR was highest in downtown Toronto at \$139.30 and lowest in the other Niagara Region at \$86.99. Southern and Central Ontario reported a decline in ADR while all other regions grew ADR compared to the previous year.

During Jan-Dec 2010, Ontario ADR was up 1.4% to \$121.18 compared to Jan-Dec 2009. Year-to-date ADR was up in the GTA, Central and Northern Ontario.

Ontario Hotel ADRs,
Jan-Dec 2001-2010



Source: PKF Consulting, Hotel Trends

Revenue per Available Room

Revenue per available room (revPAR) was \$51.24 in December 2010, up 6.1% over December 2009. During January-December 2010, revPAR grew 7.2% to \$73.27 compared to January-December 2009.

Travel Price Index (TPI)

Ontario's TPI grew 4.2% in January 2011 compared to January 2010. Costs increased for most components especially transportation and accommodations. This compares to a 2.9% increase in the Ontario Consumer Price Index (CPI).

During 2010 the Ontario TPI grew 1.1% compared to 2009 while Ontario's CPI increased 2.4%.

Ontario Index	Jan 2011 over Jan 2010	2010 over 2009
TPI	4.2%	1.1%
CPI	2.9%	2.4%

Source: Statistics Canada, Ontario Ministry of Tourism and Culture

The U.S. Travel Price Index for January 2011 was up 1.7% over January 2010 while the U.S. CPI grew 4.2%.

U.S. Index	Jan 2011 over Jan 2010	2010 over 2009
TPI	1.7%	3.8%
CPI	4.2%	1.6%

Source: Travel Industry Association of America

Economic Indicators

Consumer Confidence

The Canadian Index of Consumer Confidence rose 7.1 points in January 2011 to 88.1 (2002 = 100). While the balance of opinion improved on all four questions, responses on the future finances and major purchases questions were particularly optimistic

Confidence grew in all regions except B.C. and the Atlantic Provinces. Ontario confidence led the growth with a 13.1 point increase in January.

Region	Jan 2011	Point change Jan 2011 vs Dec 2010
Canada	88.1	+7.1
B.C.	102.2	-1.1
Prairie provinces	105.2	+6.8
Ontario	83.4	+13.1
Quebec	75.9	+1.8
Atlantic provinces	81.5	-1.6

Source: The Conference Board of Canada

The U.S. Consumer Confidence Index increased 12.3 points in January 2011 and now stands at 64.8 (1985=100).

Source: The Conference Board of Canada

Employment

In January 2011, employment in Ontario's tourism-related industries was unchanged compared to January 2010. This compares to a 2.3% increase in total employment in Ontario.

Ontario Employment	Jan 2011 over Jan 2010	2010 over 2009
Tourism Employment	0.0%	2.3%
Total Employment	2.3%	1.8%

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

During 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 Retail and Air Transportation.

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

Consumer Response Indicators

1-800-ONTARIO

There were approximately 4,000 calls to the 1-800-ONTARIO call centre in January 2011, a decrease of 15.6% over January 2010.

Throughout 2010, there were about 184,000 calls, an increase of 49.5% over 2009.

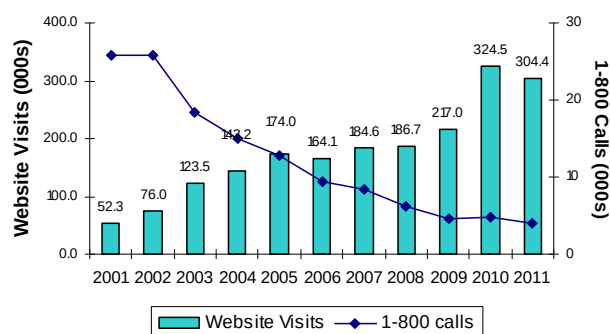
Source: Electronic Data Systems

OntarioTravel.net

In January 2011, there were approximately 311,000 user sessions on www.ontariotravel.net, Ontario's travel website, a decrease of 4.2% in the number of user sessions on the main website compared to January 2010.

During Jan-Dec 2010, there were approximately 4.4 million user sessions on the main site of the province's travel website, up 35.3% from 2009.

Visits to ontariotravel.net & Calls to 1-800-ONTARIO
Jan 2001-2011



Source: Ontario Tourism Marketing Partnership Corporation

Ontario Travel Information Centres

Visits to Ontario's Travel Information Centres (TICs) totalled about 29,000 in January 2011, an increase of 7.6% over January 2010.

During 2010, there were approximately 995,000 visits to Ontario TICs, 0.1% less than in 2009.

Change in Visits to Ontario's TICs		
Location	Jan 2011 over Jan 2010	2010 over 2009
Bainsville	100.0%	100.0%
Barrie	-3.3%	1.1%
Cornwall	-3.9%	-5.1%
Fort Erie	-9.4%	-16.7%
Fort Frances	1.6%	9.1%
Niagara Falls	0.4%	-4.9%
Sarnia	-13.2%	5.6%
Sault Ste. Marie	-1.7%	13.6%
St. Catharines	-33.3%	-8.2%
Tilbury	100.0%	100.0%
Toronto	15.0%	-11.5%
Windsor Park	2.7%	-16.9%
Windsor HC	-100.0%	-30.7%
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:	7.6%	-0.1%

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	Jan 2011 over Jan 2010	2010 over 2009
AGO	-55%	-3%
Fort William Historical Park	+2721%	-31%
Huron Historical Parks	+6%	-9%
McMichael Gallery	+27%	-16%
Niagara Parks Commission ²	-44%	0%
Ontario Heritage Trust	n/a	-7%
Ontario Place	-100%	-12%
Ontario Science Centre	-42%	-1%
Royal Botanical Gardens	-13%	-11%
Royal Ontario Museum	-15%	-11%
Science North	-94%	+2%
St Lawrence Parks ³	n/a	+16%

Fort William Historical Park held a Special Olympics event in January 2011. Ontario Place and Science North were partially closed for renovations in January 2011.

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