

APRIL 2011

Highlights

April 2011 over April 2010:

- Crossings from the U.S. to Ontario declined 3.6%, with same-day crossings down 5.8% and overnight crossings down 1.1%.
- Crossings from overseas markets to Ontario grew by 15.1%.
- Crossings by Ontarians to the U.S. increased by 13.2% (same-day crossings up 16.1% and overnight crossings up 9.3%), and travel to overseas countries grew 10.9%.
- Ontario hotel occupancy was unchanged.
- Employment in Ontario's tourism-related industries increased by 1.3%.
- Ontario's Travel Price Index increased by 6.9%.

YTD April 2011 versus YTD April 2010:

- U.S. crossings to Ontario decreased 5.2%, with same-day crossings down 8.3% and overnight crossings down 1.1%.
- Crossings from overseas markets to Ontario grew 6.4%.
- Ontarians' crossings to the U.S. grew by 10.0% (same-day visits up 13.3% and overnight entries up 5.5%), and travel to overseas countries increased 8.4%.
- Ontario hotel occupancy grew 2.0 percentage points.
- Employment in Ontario's tourism-related industries was unchanged.
- Ontario's Travel Price Index increased by 5.9%.

Inside This Issue

Tourism Industry

Border Crossings
Accommodation Statistics
Travel Price Index

Consumer Response

1 1-800-ONTARIO
4 OntarioTravel.net
4 Ontario Travel
Information Centres

5
5
6

Economic Indicators

Consumer Confidence
Employment

5 Attendance at Agencies
5

Tourism Industry Statistics

Border Crossings

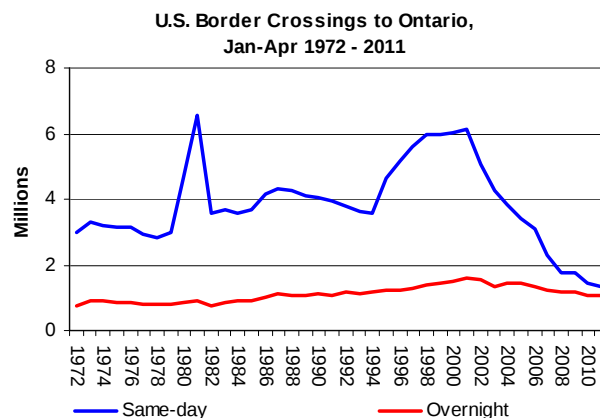
Total International Entries

In April 2011, there were 854,000 (U.S. and overseas) border crossings into Ontario, a decrease of 1.2% compared to April 2010. In 2010, April accounted for 6.8% of Ontario's annual international border crossings.

During the first 4 months of 2011, total international border crossings declined by 3.8% over 2010 to 2.7 million entries.

U.S. Entries

U.S. entries accounted for 85% of international entries into Ontario in April 2011. During this month, U.S. border crossings into Ontario declined 3.6% over April 2010 to 728,000 crossings. Same-day entries decreased 5.8% while overnight entries dropped 1.1%.



Source: Statistics Canada

In Jan-Apr 2011, there were 2.4 million border crossings from the U.S. to Ontario, a decrease of 5.2% over 2010. Same-day crossings declined 8.3% with 120,000 fewer crossings and overnight crossings decreased 1.1% or 11,000 fewer crossings.

In April 2011, U.S. entries declined to Ontario and B.C. while Quebec remained unchanged. During the first 4 months of 2011, U.S. entries to all regions declined. Ontario accounted for 58% of U.S. entries into Canada in April 2011.

Region	U.S. Entries, Apr 2011 over Apr 2010		U.S. Entries, YTD Apr 2011 over YTD Apr 2010	
	Entries*	% change	Entries*	% change
Canada	1,250,190	-3.3%	4,193,954	-7.1%
B.C.	251,560	-3.2%	879,895	-14.0%
Ontario	727,758	-3.6%	2,382,731	-5.2%
Quebec	142,950	0.1%	480,401	-2.5%

Source: Statistics Canada

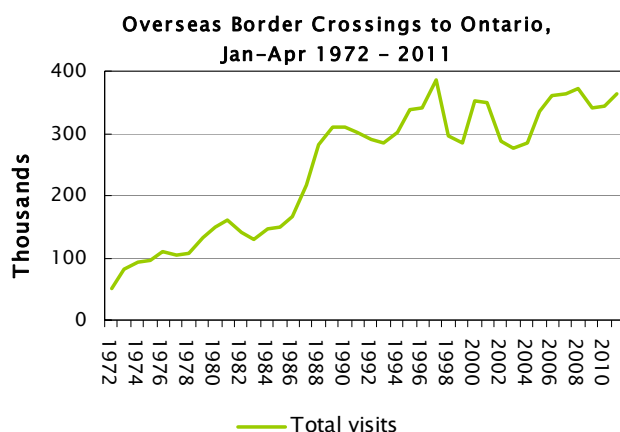
U.S. Entries: Mode of Transportation

In April 2011, 79% of U.S. entries to Ontario were via automobile, 16% by commercial air travel¹, 4% by bus and 1% by other modes. Entries by automobile were down 3.2% in April 2011 and down 7.1% for the 4 months ending April 2011 compared with 2010. Commercial air travel from the U.S. was down 1.2% in April 2011 while entries by bus declined 15.3%.

Overseas Entries

In April 2011, the 126,000 overseas entries into Ontario accounted for 15% of the province's total international entries, an increase of 15.1% compared to April 2010. April accounted for 6.5% of overseas entries in 2010.

During the first 4 months of 2011, overseas entries to Ontario grew 6.4% over 2010.



Source: Statistics Canada

In April 2011, overseas entries to Ontario and Quebec grew while entries to B.C. declined. Similarly, overseas entries to Ontario and Quebec grew in the first 4 months of 2011. Ontario accounted for 44% of Canada's overseas entries during April 2011.

Region	Overseas Entries, Apr 2011 over Apr 2010		Overseas Entries, YTD Apr 2011 over YTD Apr 2010	
	Entries*	% change	Entries*	% change
Canada	288,492	7.8%	904,447	-2.5%
B.C.	81,294	-4.1%	280,811	-12.7%
Ontario	126,166	15.1%	364,270	6.4%
Quebec	57,450	16.1%	181,534	9.8%

Source: Statistics Canada

Overseas Entries: Traditional Markets

In April 2011, arrivals from all traditional markets grew significantly over April 2010 with entries from France up 41%, arrivals from Japan up 18%, and entries from the U.K. and Germany up 9% each.

During Jan-Apr 2011, arrivals from Germany were down 10% while arrivals from the U.K., Japan and France all grew compared to Jan-Apr 2010.

Market	Apr 2011 over Apr 2010		YTD Apr 2011 over YTD Apr 2010	
	Entries*	% change	Entries*	% change
U.K.	21,507	9.0%	57,478	2.0%
Germany	9,141	9.0%	22,277	-10.1%
Japan	5,613	17.9%	18,326	8.1%
France	5,891	40.8%	15,236	3.3%

Source: Statistics Canada

Overseas Entries: Emerging Markets

Arrivals from most overseas countries other than Brazil grew in April 2011 compared to April 2010 with arrivals from China up 37%, entries from Hong Kong up 27% and entries from India and Mexico up 22% each.

During the first 4 months of 2011, arrivals were up from all reported countries except South Korea (-2%), and Italy (-1%). Entries from China increased 45% and arrivals from Hong Kong grew 30% in 2011 versus 2010.

¹ Commercial Air Travel represents 96% of all air travel.

* 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 2011 over Apr 2010		YTD Apr 2011 over YTD Apr 2010	
	Entries*	% change	Entries*	% change
China	5,482	37.2%	19,408	44.6%
India	5,815	21.9%	16,160	12.5%
Brazil	3,579	-9.8%	15,475	3.1%
Mexico	4,769	21.6%	12,706	5.9%
South Korea	3,666	3.3%	11,687	-1.6%
Australia	3,432	9.9%	9,850	11.0%
Hong Kong	2,929	26.9%	9,697	30.3%
Italy	3,079	13.4%	8,345	-0.8%
Netherlands	2,742	9.5%	7,153	5.5%

Source: Statistics Canada

Outbound Travel

Total International Travel

During April 2011, Ontarians made 2.5 million international border crossings (U.S. and overseas), an increase of 12.9% versus April 2010.

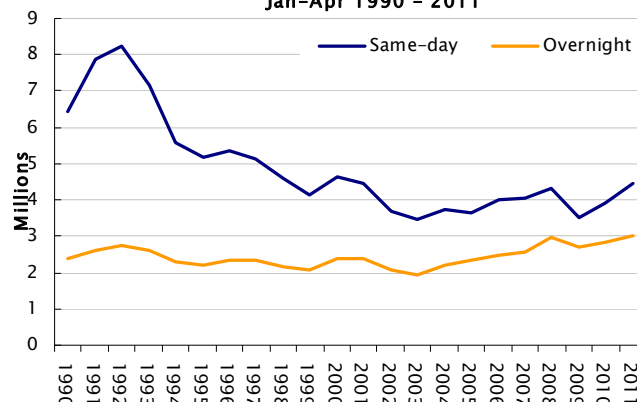
Total international border crossings by Ontarians increased 9.7% to 9.3 million crossings during Jan-Apr 2011 compared to 2010.

Ontario continues to generate more visitors to international destinations than it receives. In the first 4 months of 2011, there were 2.7 million international entries into Ontario compared to 9.3 million international border crossings made by Ontarians.

Travel to the U.S.

In April 2011, travel to the U.S. accounted for 84% of Ontarian's international visits. Ontario residents made 2.1 million entries into the U.S. in April 2011, 13.2% more than in April 2010. Same-day visits, which represented 58% of entries, grew 16.1% while overnight visits increased 9.3%.

Outbound Border Crossings to the U.S., Jan-Apr 1990 - 2011



Source: Statistics Canada

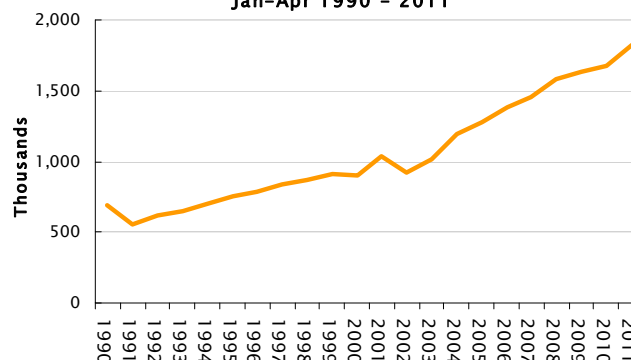
In Jan-Apr 2011, there were 7.5 million border crossings from Ontario to the U.S., an increase of 10.0% over 2010. Same-day visits grew 13.3% or 521,000 entries and overnight visits increased 5.5% or 157,000 entries compared to Jan-Apr 2010.

Travel to Overseas Countries

In April 2011, overseas travel represented 16% of Ontario resident's international border crossings with 400,000 crossings. Travel to overseas countries grew 10.9% in April 2011 compared to April 2010.

During the first 4 months of 2011, Ontarians made 1.8 million overseas crossings, up 8.4% from 2010.

Outbound Border Crossings to Overseas Countries, Jan-Apr 1990 - 2011



Source: Statistics Canada

Accommodation

Occupancy Rates

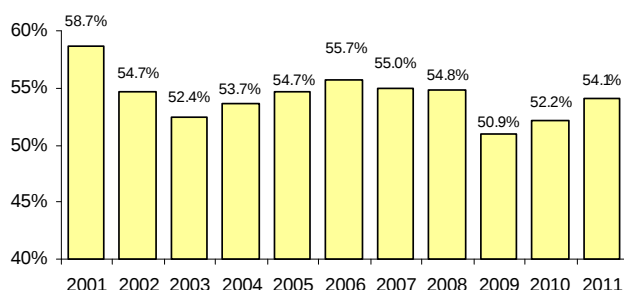
In April 2011, the occupancy rate at Ontario hotels was 57.2%, unchanged compared to April 2010.

The Greater Toronto Area (GTA), Ottawa and North Western Ontario all reported occupancy rates over 60%. Compared to April 2010, occupancy was up in Southern, Central, and North Western Ontario and Ottawa.

In Jan-Apr 2011, hotel occupancy in Ontario was 54.1%, up 2.0 percentage points compared to Jan-Apr 2010.

The GTA, Ottawa and North Western Ontario all posted a 4 month occupancy rate over 60%. Thunder Bay had the highest 4 month rate at 69%. Occupancy rates increased in all regions other than North Eastern and North Central Ontario where they declined in Jan-Apr 2011 compared to Jan-Apr 2010.

Ontario Hotel Occupancy Rates,
Jan-Apr 2001-2011



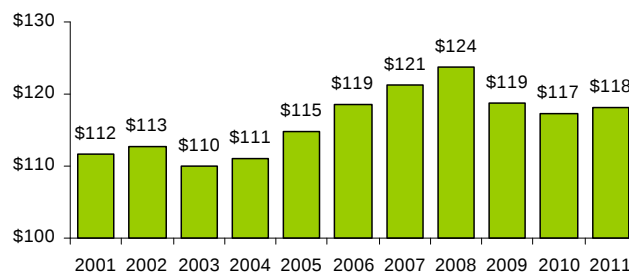
Average Daily Rates (ADR)

The average daily rate (ADR) dropped 3.4% in April 2011 to \$116.53.

In April 2011, ADR was highest in downtown Toronto at \$153.02 and lowest in the other Niagara Region at \$88.47. ADR declined compared to the previous year in all regions except Central, North Eastern, and North Central Ontario.

During the first 4 months of 2011, Ontario ADR was up 0.6% to \$118.05 compared to 2010. Year-to-date ADR was up in all regions other than Ottawa and Southern Ontario where it declined slightly.

Ontario Hotel ADRs,
Jan-Apr 2001-2011



Revenue per Available Room

Revenue per available room (revPAR) was \$66.67 in April 2011, down 3.4% over April 2010. During the first 4 months of 2011, revPAR grew 4.4% to \$63.83 compared to 2010.

Source: PKF Consulting, Hotel Trends²

Travel Price Index (TPI)

Ontario's TPI grew 6.9% in April 2011 compared to April 2010. Costs increased for most components especially transportation. This compares to a 3.6% increase in the Ontario Consumer Price Index (CPI).

During Jan-Apr 2011, the Ontario TPI grew 6.9% compared to 2010 while Ontario's CPI increased 3.1%.

Ontario Index	Apr 2011 over Apr 2010	YTD Apr 2011 over YTD Apr 2010
TPI	6.9%	5.9%
CPI	3.6%	3.1%

Source: Statistics Canada, Ontario Ministry of Tourism and Culture

The U.S. Travel Price Index for April 2011 was up 7.3% over April 2010 while the U.S. CPI grew 3.2%.

U.S. Index	Apr 2011 over Apr 2010	YTD Apr 2011 over YTD Apr 2010
TPI	7.3%	5.9%
CPI	3.2%	2.4%

Source: Travel Industry Association of America

² Source: PKF Consulting Inc. with reproduction and use of information subject to PKF Disclaimer and Restrictions as detailed at www.pkfcanada.com Users of this information are advised that PKF Consulting Inc. and Members of PKF International Association do not represent the information contained herein to be definitive or all-inclusive. PKF Consulting Inc. believes the information to be reliable, but is not responsible for errors or omissions.

Economic Indicators

Consumer Confidence

The Canadian Index of Consumer Confidence gained 4.0 points in April 2011 and the index stands at 87.7 (2002 = 100). Confidence increased on all 4 questions, especially those regarding major purchases and future job prospects.

Confidence grew in all regions except Quebec where it declined 1 point. Ontario confidence increased 2.5 points in April to 76.2.

Region	Apr 2011	Point change Apr 2011 vs Mar 2011
Canada	87.7	+4.0
B.C.	108.9	+17.7
Prairie provinces	105.9	+7.1
Ontario	76.2	+2.5
Quebec	81.0	-1.0
Atlantic provinces	88.1	+3.7

Source: The Conference Board of Canada

The U.S. Consumer Confidence Index grew 1.6 points in April 2011 and now stands at 65.4 (1985=100).

Source: The Conference Board of Canada

Employment

In April 2011, employment in Ontario's tourism-related industries grew 1.3% compared to April 2010. Employment in the Arts, Entertainment & Recreation, and Transportation industries increased while employment in Accommodations, Travel Services, Food & Beverage and Retail declined. This compares to a 2.5% increase in total employment in Ontario.

During the first four months of 2011, tourism-related employment was unchanged versus 2010 while total employment grew 2.3%.

Ontario Employment	Apr 2011 over Apr 2010	YTD Apr 2011 over YTD Apr 2010
Tourism Employment	1.3%	0.0%
Total Employment	2.5%	2.3%

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

Consumer Response Indicators

1-800-ONTARIO

There were approximately 7,100 calls to the 1-800-ONTARIO call centre in April 2011, a decrease of 41.5% over April 2010.

Throughout the first 4 months of 2011, there were about 26,000 calls, a drop of 38.0% over 2010.

Source: Electronic Data Systems

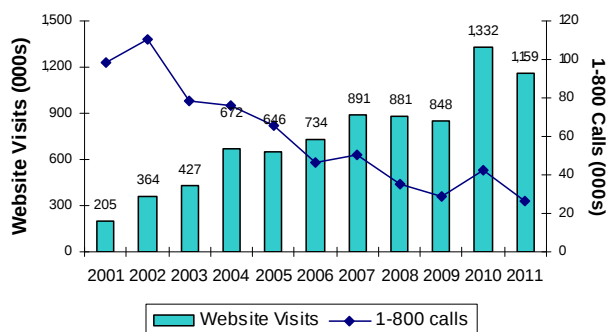
OntarioTravel.net

In April 2011, there were approximately 210,100 user sessions on www.ontariotravel.net, Ontario's travel website, a decrease of 36.6% in the number of user sessions on the main website compared to April 2010.

Changes in the search engine marketing campaign are likely responsible for the drop in visits.

During Jan-Apr 2011, there were approximately 1.2 million user sessions on the main site of the province's travel website, down 13.0% from Jan-Apr 2010.

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



Source: Ontario Tourism Marketing Partnership Corporation

Ontario Travel Information Centres

Visits to Ontario's Travel Information Centres (TICs) totalled about 45,000 in April 2011, a decrease of 5.8% over April 2010.

During the first 4 months of 2011, there were approximately 140,000 visits to Ontario TICs, 0.4% more than in 2010.

Change in Visits to Ontario's TICs		
Location	Apr 2011 over Apr 2010	YTD Apr 2011 over YTD Apr 2010
Bainsville	100.0%	100.0%
Barrie	-12.0%	-10.3%
Cornwall	-1.0%	1.7%
Fort Erie	-32.3%	-30.6%
Fort Frances	-26.5%	-9.0%
Niagara Falls	-13.0%	-9.6%
Sarnia	-37.7%	-28.1%
Sault Ste. Marie	-36.3%	-21.0%
St. Catharines	-14.3%	-16.6%
Tilbury	100.0%	100.0%
Toronto	0.3%	8.9%
Windsor Park	-17.7%	-9.6%
Windsor HC	-100.0%	-100.0%
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:	-5.8%	0.4%

Source: Ontario Ministry of Tourism and Culture

The Bainsville and Tilbury centres opened July 1, 2010 and these new centres drove the growth in visits to TICs.

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 2011 over Apr 2010	YTD Apr 2011 over YTD Apr 2010
AGO	-70%	-53%
Fort William Historical Park	-27%	+175%
Huronian Historical Parks	-13%	-3%
McMichael Gallery	+57%	+23%
Niagara Parks Commission ³	-35%	-34%
Ontario Heritage Trust	+42%	+46%
Ontario Place	-36%	-42%
Ontario Science Centre	-6%	-22%
Royal Botanical Gardens	-47%	-33%
Royal Ontario Museum	+22%	-5%
Science North	+2%	-29%
St Lawrence Parks ⁴	closed	closed

AGO hosted the King Tut exhibit in 2010. Fort William Historical Park held a Special Olympics event in January 2011. Ontario Place and Science North were partially closed for renovations in Jan/Feb 2011.

³ 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

⁴ St Lawrence Parks includes Fort Henry and Upper Canada Village