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Economic Outlook

Economic Indicators Canada and Ontario

		2010*	2011*	2012*
Real Gross Domestic Product** <i>% change over previous year</i>	ON	3.5	2.1	2.7
	Can	3.2	2.0	2.7
Retail Sales <i>% change over previous year</i>	ON	5.0	4.7	3.9
	Can	5.1	4.4	4.2
Unemployment Rate (%)	ON	8.6	7.8	6.9
	Can	8.0	7.5	6.8
Personal Disposable Income <i>% change over previous year</i>	ON	4.4	3.3	3.9
	Can	4.0	3.0	4.3

*Forecast data. **GDP at market prices (constant 2002\$)
Source: Conference Board of Canada, Key Economic Indicators, Provincial Outlook Winter 2011

Tourism Statistics International Border Crossings

U.S. border crossings to Ontario grew 1% in Q4 2010 but decreased 4% in 2010.

During October to December 2010, there were 2.3 million border crossings from the U.S. to Ontario, an increase of 1.1% versus 2009.

- In Q4 2010, U.S. same day crossings, which represented 53% of crossings to Ontario, decreased 0.5% or by 6,000 crossings, while crossings for overnight trips grew 2.9% or 30,000 more crossings compared to Q4 2009.

For the 12 months ending December 2010, there were 11.1 million border crossings from the U.S. to Ontario, a decrease of 3.5% versus 2009.

Overseas crossings to Ontario grew 7% in Q4 2010 and increased 6% in 2010.

In Q4 2010, there were 336,000 overseas entries into Ontario, an increase of 7.4% over Q4 2009.

- During 2010, arrivals from Japan grew 17%, arrivals from France were up 8% and arrivals from Germany increased 4% while arrivals from the U.K. declined 1% compared to 2009. Arrivals from most emerging markets increased in Jan-Dec 2010, especially arrivals from India (+26%), arrivals from China (+25%) and arrivals from Brazil (+25%) while arrivals from Mexico declined 29% versus 2009.

International Border Crossings into Ontario, % Change versus year ago

	Q1 2010	Q2 2010	Q3 2010	Q4 2010	Jan-Dec 2010
Total International	-12.8%	-6.2%	3.4%	1.8%	-2.4%
Total U.S.	-14.6%	-7.9%	2.9%	1.1%	-3.5%
Same Day	-18.6%	-10.7%	3.1%	-0.5%	-6.2%
Overnight	-8.3%	-5.2%	2.9%	2.9%	-0.9%
Total Overseas (%)	3.8%	5.5%	6.6%	7.4%	6.0%

Source: Statistics Canada

International Travel Account



Ontario's travel deficit was \$7.3 billion in 2010, an increase of 7.0% from 2009. Ontarians spent \$13.3 billion outside of Canada, an increase of 6.4%, while travellers from the U.S. and overseas countries spent \$6.0 billion in Ontario, an increase of 5.7%.

- Ontario's travel deficit with the U.S. was \$4.4 billion, up 11.9% compared to 2009. Ontarians spent \$7.6 billion in the U.S. in 2010, 8.1% more than in 2009, while U.S. travellers spent \$3.2 billion in Ontario, an increase of 3.2% versus a year ago.
- Ontario's travel deficit with overseas countries was \$2.8 billion, up 0.2% from 2009. Ontarians spent \$5.7 billion in overseas countries, an increase of 4.2% over 2009, while overseas travellers spent \$2.8 billion in Ontario, an increase of 8.7%.

Canada's travel deficit was \$13.7 billion in 2010, up 12.0% from 2009.

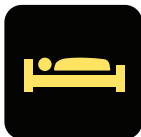
Source: Statistics Canada, Ontario Ministry of Tourism and Culture



Accommodations

Occupancy Rates, Average Daily Rates and Revenue per Available Room all grew in 2010

- During Jan-Dec 2010, occupancy rates averaged 60.5%, up 3.3 percentage points over 2009.
- The average daily rate grew 1.4% to \$121.18.
- Revenue per available room increased 7.2% in 2010 to \$73.27.



Ontario Hotel Occupancy and Average Daily Rates January to December 2010

	Occupancy Percentage (%)			Average Daily Rate (\$)		
	Jan-Dec 2010	Jan-Dec 2009	Point change	Jan-Dec 2010	Jan-Dec 2009	% Change
ONTARIO	60.5%	57.2%	3.3	\$121.18	\$119.52	1.4%
Greater Toronto Area (GTA)	66.3%	60.9%	5.4	\$127.27	\$123.94	2.7%
Downtown Toronto	74.2%	68.2%	6.1	\$157.38	\$145.98	7.8%
Toronto Airport	65.6%	58.3%	7.4	\$108.85	\$109.85	-0.9%
GTA West	59.2%	55.7%	3.5	\$101.72	\$103.53	-1.7%
GTA East/North	60.4%	55.3%	5.0	\$105.91	\$108.03	-2.0%
Eastern Ontario	52.0%	51.9%	0.1	\$105.05	\$106.02	-0.9%
Kingston	54.7%	59.4%	-4.7	\$117.06	\$118.85	-1.5%
Other Eastern Ontario	50.7%	48.9%	1.8	\$99.13	\$99.84	-0.7%
Ottawa	67.3%	65.7%	1.6	\$132.48	\$133.18	-0.5%
Downtown Ottawa	69.9%	68.4%	1.4	\$136.89	\$138.41	-1.1%
Ottawa West	61.5%	58.0%	3.6	\$127.68	\$127.00	0.5%
Ottawa East	59.7%	60.8%	-1.0	\$104.03	\$102.90	1.1%
Southern Ontario	52.0%	49.6%	2.4	\$112.39	\$114.02	-1.4%
London	54.1%	51.8%	2.3	\$96.85	\$98.42	-1.6%
Windsor	43.7%	40.8%	2.9	\$97.96	\$99.53	-1.6%
K/W/Cambridge/Guelph	52.1%	46.7%	5.4	\$99.84	\$104.28	-4.3%
Hamilton/Brantford	50.9%	52.3%	-1.4	\$99.80	\$104.09	-4.1%
Niagara Falls	55.6%	54.8%	0.8	\$130.95	\$132.19	-0.9%
Other Niagara Falls Region	44.1%	42.3%	1.8	\$97.56	\$95.68	2.0%
Other Southern Ontario	48.4%	42.6%	5.8	\$100.52	\$103.35	-2.7%
Central Ontario	49.5%	46.8%	2.8	\$123.19	\$119.04	3.5%
North Eastern Ontario	60.6%	62.0%	-1.4	\$104.20	\$100.42	3.8%
North Bay	55.7%	64.2%	-8.5	\$104.98	\$101.06	3.9%
Sudbury	65.5%	62.0%	3.5	\$108.37	\$107.01	1.3%
North Western Ontario	69.0%	65.3%	3.6	\$97.54	\$96.44	1.1%
Thunder Bay	70.5%	65.3%	5.2	\$97.57	\$96.51	1.1%
Sault Ste. Marie	53.9%	54.4%	-0.5	\$101.41	\$93.51	8.5%

Source: Trends in the Canadian Hotel Industry, PKF Consulting

Visitor Inquiries



User sessions at OntarioTravel.net and call volume to 1-800-Ontario increased while visits to Ontario's Travel Information Centres remained unchanged

- During 2010, there were approximately 4.4 million user sessions at www.OntarioTravel.net, up 35.3% over 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 Corp. (OTMPC)

- Calls to the 1-800-ONTARIO Call Centre totalled about 184,000 throughout Jan-Dec 2010, an increase of 49.5% over Jan-Dec 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: Ontario Tourism Marketing Partnership Corp. (OTMPC)

- In 2010, there were approximately 995,000 visits to Ontario's Travel Information Centres (TICs), 0.1% less than in 2009.

Source: Ontario Tourism Marketing Partnership Corp. (OTMPC)

Travel Price Index



Price of travel in Ontario grew slightly during 2010

- Ontario's Travel Price Index (TPI) was up by 1.1% in Jan-Dec 2010 compared to 2009. Cost of transportation and accommodations drove the growth.
- Ontario's Consumer Price Index (CPI) grew twice as much as TPI. During 2010, Ontario's CPI grew 2.4% while TPI grew 1.1% over 2009.

Source: Statistics Canada; Ontario Ministry of Tourism and Culture

Food Service and Drinking Places

Sales at Ontario's Restaurants & Bars grew 2%

- Current dollar sales for the Ontario food services and drinking places industry increased 2.3% in 2010 over 2009 to \$18.5 billion. Ontario accounted for 37.5% of Canada's restaurant and bar sales.
- During the same time period, sales of Canadian food service and drinking places rose 2.7%.

Source: Statistics Canada; Ontario Ministry of Tourism and Culture

Tourism-Related Employment



Employment in tourism related industries increased 2% in 2010

- Employment in the Travel Arrangement, Amusement/ Recreation and Accommodation/Food Services industries grew in 2010 compared to 2009, however this growth was slightly offset by declines in employment in Motion Picture & Video industries, Amusement Parks, and Retail.
- Ontario's tourism related employment grew 2.3% in Jan-Dec 2010 while total employment in Ontario grew 1.8%.

Source: Statistics Canada; Ontario Ministry of Tourism and Culture

What's New in the Ministry's Tourism Research?

www.ontario.ca/tourismresearch

Tourism Research Website Refresh

The Ontario Ministry of Tourism and Culture has recently refreshed its website. You can now access our tourism statistics and tools via www.ontario.ca/tourismresearch. Please update your bookmarks. Please contact us at www.ontario.ca/tourismresearch with any questions.

Subscriber Database Update – Please update your contact information

The Research Unit is in the process of updating our subscriber database so if you would like to continue to receive our publications then please confirm your contact information at www.ontario.ca/tourismresearch

New subscribers can also register at www.ontario.ca/tourismresearch

Visit our website

www.ontario.ca/tourismresearch

For information on the industry's current performance, historical statistics, provincial forecasts, market reports and more.

www.ontario.ca/tourismresearch

Useful Websites

Ontario Ministry of Tourism and Culture,
Research Unit www.ontario.ca/tourismresearch

Ontario Ministry of Tourism and Culture
www.tourism.gov.on.ca

Ontario Tourism Marketing
Partnership Corporation
www.tourismpartners.com

Canadian Tourism Commission
www.canada.travel

Statistics Canada
www.statcan.gc.ca

Travel and Tourism Research Association
(TTRA) Canada www.ttracanada.ca

Travel and Tourism Research Association
(TTRA) International
www.ttra.com

World Tourism Organization
www.world-tourism.org

US Department of Commerce, Tourism Industries
www.tinet.ita.doc.gov

Travel Industry Association of America (TIA)
www.tia.org

Ontario Tourism Education Corporation
www.otec.org

Tourism Industry Association of Canada
www.tiac.travel

Tourism Industry Association of Ontario
www.tiao.travel

Ontario Tourism Facts & Figures

Upcoming Conferences & Events

- The **MRIA 2011 National Conference, "Ripe with Innovation"**, will be held from **May 29-31** in the beautiful city of **Kelowna**, British Columbia. Known for its scenic environment of lakes and mountains, sunshine and fruit, wine, golf and ski hills, the **Okanagan** is gaining increasing prominence as a centre of incubation for innovative excellence. Please visit www.mria-arim.ca for more details.
- The **Travel and Tourism Research Association 2011 International Conference, "Seeing the Forest AND the Trees – Big Picture Research in a Detail Driven World"**, will be held **June 19-21, 2011** in London, Ontario. Please visit www.ttra.com for more details.
- The Ontario Tourism Marketing Partnership Corporation (OTMPC) and the Tourism Industry Association of Ontario (TIAO) are co-hosting the **7th annual Ontario Tourism Summit**. The conference will be held **October 3 – 5, 2011** at the Hamilton Convention Centre. Details are posted at www.ontariotourismsummit.com/.
- **Canada's Tourism Leadership Summit 2011**, hosted by the Tourism Industry Association of Canada (TIAC) will be held from **November 22-24, 2011** in Ottawa, Ontario. Visit www.tiac.travel for more information.

Questions? Suggestions?

Please contact the Research Unit at (416) 325-8287
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