

Ontourism

We know. Just ask.



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CONTENTS

- > Hotel Statistics
- > Border Crossings
- > Employment
- > Travel Price Index
- > Visitor Enquiries
- > Currency Exchange
- > Gas Prices
- > ONTrends
- > ONTopic

ON the net

You can now get more detailed information about the statistics in our newsletter on our website

Hotel Statistics

Occupancy Rates, Average Daily Rates and Revenue per Available Room all grew in Q1 2015

- » During Jan - Mar 2015, Ontario occupancy rates averaged **55.1%** up 0.3 percentage points over 2014
- » The average daily rate grew 3.4% to \$128.76
- » Revenue per available room increased 4.0% to \$70.91

Location	Occupancy Percentage		Average Daily Rate	
	Q1 2015	Point Change	Q1 2015	% change
ONTARIO	55.1%	0.3	\$128.76	3.4%
GreaterTorontoArea (GTA)	61.8%	-0.8	\$139.33	2.9%
Eastern Ontario	45.2%	-1.1	\$105.90	5.0%
Ottawa	64.3%	4.3	\$146.69	4.4%
Southern Ontario	45.8%	0.4	\$107.75	5.3%
Central Ontario	45.1%	0.7	\$127.94	4.1%
NorthEasternOntario	53.5%	4.5	\$113.34	4.2%
NorthCentralOntario	45.5%	6.8	\$95.86	-3.8%
NorthWesternOntario	54.3%	1.9	\$107.89	7.4%

Source: PPKF CONSULTING INC. with reproduction and use of information subject to PKF Disclaimer and Restrictions as detailed at www.pkfcanada.com

Note: Quarterly averages calculated by MTCS

> Detailed data is available at: <http://www.mtc-currentperformance.com/Hotel>.

Q1 2015 Highlights

- » Border crossings from the U.S. to Ontario increased 5.6%, with same-day crossings up 5.2% and overnight crossings up 6.2%.
- » Entries from overseas markets to Ontario grew 9.1%.
- » Ontario hotel occupancy rose 0.3 percentage points.
- » Ontario's Travel Price Index increased 1.6%.
- » Employment in Ontario's tourism-related industries declined 5.5%.

ON the Road

Border Crossings

- » In Q1 2015, there were 2.1 million international entries to Ontario, **6.1%** more than in 2014

	Entries	% chg
International	2,075,149	6.1%
US	1,758,631	5.6%
Same-day	1,032,570	5.2%
Overnight	726,061	6.2%
Overseas	316,518	9.1%

US Border Crossings

- » There were 1.8 million US entries to Ontario in Q1 2015, **5.6%** more than in Q1 2014
- » Same-day entries increased 5.2% while overnight crossings grew 6.2%

Source: Statistics Canada

ON the Job

Employment in tourism related industries declined

5.5% in Q1 2015

- » Employment in the Travel Services industries grew, Food & Beverage employment was unchanged while the number of jobs in the Retail, Transportation, Accommodation; and Arts, Entertainment and Recreation sectors declined
- » Ontario's tourism related employment decreased 5.5% in Jan-Mar 2015 while total employment in Ontario increased 0.5%

Source: Statistics Canada, Ontario Ministry of Tourism, Culture and Sport

> Detailed data available at <http://www.mtc-currentperformance.com/Employment.aspx>

Overseas Border Crossings

- » In Q1 2015, there were 316 thousand overseas entries to Ontario, an increase of 9.1% compared to 2014
- » Arrivals were up from most countries with China (+32%), Hong Kong (+32%), Italy (+30%), Mexico (+21%), and Brazil (+20%)



	Entries	% chg
U.K	38,908	9.7%
China	34,384	31.8%
Germany	17,508	-5.4%
Japan	17,045	-7.7%
Brazil	16,536	20.1%
France	12,002	7.8%
South Korea	11,663	0.7%
India	11,518	8.8%
Mexico	11,223	20.6%
Italy	9,295	29.5%
Hong Kong	8,451	31.6%
Australia	7,920	2.4%
Netherlands	4,454	-8.1%

> Detailed data available at: <http://www.mtc-currentperformance.com/Home.aspx>

Travel Price Indexes

The price of travel in Ontario grew 1.6% in Q1 2015

- » Ontario's Travel Price Index (TPI) grew 1.6% in Jan-Mar 2015 compared to 2014. Prices of Transportation, Food & Beverage, Recreation & Entertainment, and Retail all grew versus 2014 while costs of Operation of Passenger Vehicles and Accommodations declined.
- » Ontario's Consumer Price Index (CPI) increased less than TPI. During the first quarter of 2015, Ontario's CPI grew 1.4% while TPI grew 1.6% over 2014

Source: Statistics Canada, Ontario Ministry of Tourism, Culture and Sport

> Detailed data available at <http://www.mtc-currentperformance.com/TPI.aspx>

Visitor inquiries

Visits to Ontario's Travel Information Centres, call volume to 1-800-Ontario and user sessions at ontariotravel.net all increased

- » In the first quarter of 2015, there were about 106,000 visits to Ontario's Travel Information Centres (TICs), 8.2% more than in 2014.
- » Calls to the 1-800-ONTARIO Call Centre totalled 12,000 throughout Jan-Mar 2015, an increase of 11.2% over Jan-Mar 2014
- » During Q1 2015, there were approximately 371,000 user sessions at www.OntarioTravel.net, up 17.8% over Q1 2014.

Source: Ontario Tourism Marketing Partnership Corp. (OTMPC)

> Detailed data available at <http://www.mtc-currentperformance.com/CallsTICs.aspx>

Exchange Rates

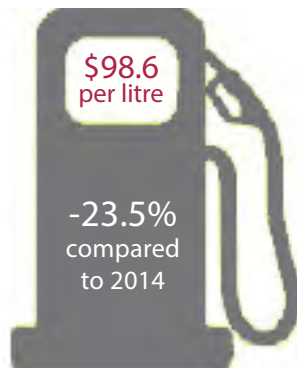
(\$1 US = \$1.24 Cdn)

Source: Bank of Canada

> Detailed data available at <http://www.mtc-currentperformance.com/ExchangeRate.aspx>

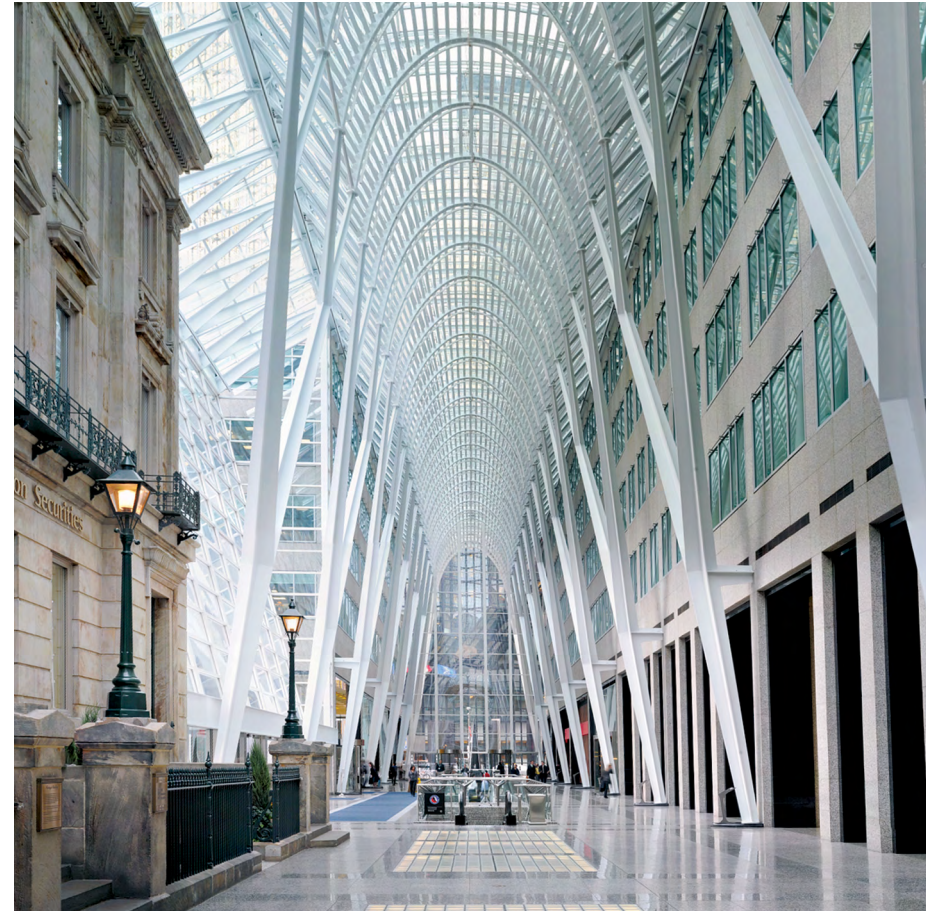
Gas Prices

Average gas price in Ontario Q1 2015



Source: Ontario Ministry of Energy

> Detailed data available at <http://www.energy.gov.on.ca/en/fuel-prices/?fuel=REG&yr=2015>



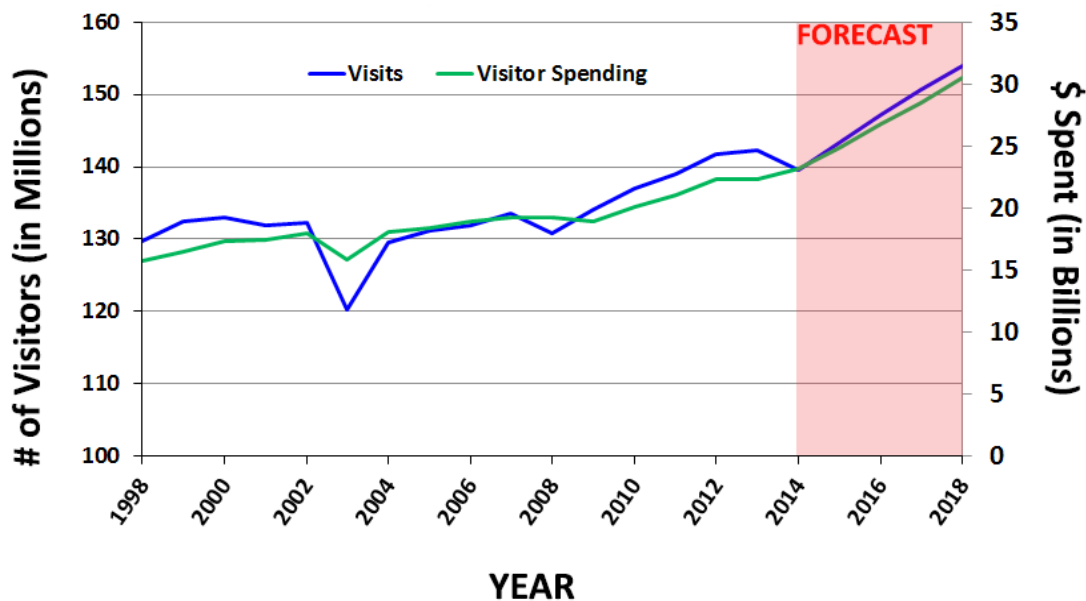
ON trends

Tourism Outlook updated to 2018

This forecast includes annual visits, spending and growth rates broken out by inbound/outbound, origin and length of stay. Also included are projections for key indicators such as exchange rates, GDP, etc.

The Ontario Tourism Outlook can be accessed via http://www.mtc.gov.on.ca/en/research/business_outlook/outlook.shtml

Total Visits vs Visitor Spending, 1998 - 2018



- » In 2012 there were 141.7 million visits in Ontario and visitors spent \$22.3 billion
- » Ontario visits are forecast to grow an average of 1.6% per year from 2014 to 2018 while visitor spending will increase by an average of 6.4% per year.
- » By 2018, total visits are forecast to reach 154M with visitor spend of \$30B

Origin	% of Visits	Average Annual Growth 2014-2018
Total Visits	100%	1.6%
Ontario	86%	1.4%
Same day	59%	1.4%
Overnight	27%	1.4%
Other Canada	4%	3.2%
U.S.	8%	1.5%
Border	6%	1.6%
Non-Border	2%	1.1%
Overseas	2%	7.5%
UK	0.2%	4.4%
Germany	0.1%	5.9%
France	0.1%	3.7%
Japan	0.1%	3.7%
China	0.1%	12.9%
India	0.1%	6.0%
Brazil	0.1%	2.6%
Mexico	0.04%	4.3%
South Korea	0.03%	16.5%



- » Visits among Ontario residents are forecast to increase between 2014 and 2018, with an average annual growth rate of 1.4%
- » Other Canada visits are forecast to increase an average of 3.2% per year
- » U.S. visits are forecast to decline in 2014, then grow in 2015-2018, averaging 1.5% growth per year from 2014 to 2018
- » The overseas market is forecast to grow over the next 5 years an average 7.5% per year, especially China (13% annual growth)

The Ontario tourism outlook is based on an econometric model which includes the following variables:

- » GDP
- » CPI
- » Exchange Rates
- » Gas Prices

Full details available at http://www.mtc.gov.on.ca/en/research/business_outlook/outlook.shtml

Ontourism

We know. Just ask.

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