



Naturally Adventurous

RTO 12 Tourism Business Dashboard

For fiscal Q4, January 2014 to March 2014

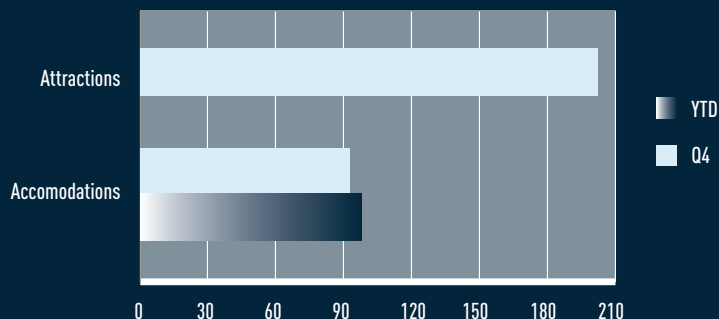




Q1

RTO 12 Tourism Business Dashboard

Accommodations and attractions indices are up in fiscal Q4.



Up 99% in Q4

Attractions Index



**Up 2% in Q4, up 5.8% YTD
(vs 1.9% in Ont)**

Occupancy Index



**-11.6°C
(-6.3°C in 2012)**

Weather Index

Average Temperature

**54 days versus
62 in 2012**

Days of Precipitation

**169MM vs 233MM (twice
as much rain in 2012)**

Total Precipitation





Interpreting the Data

The data sources are as follows:

- Occupancy data is from PKF Consulting and is reported monthly.
- Weather data is from Environment Canada's Muskoka weather station.
- Winter attractions data is from 3 operators only. Shown in aggregate only. Caution must be exercised with this data as the sample size is small.



Observations

Winter 2014 Was All About...Winter

From January to March, Ontario's cities suffered through one of the snowiest and coldest winters in memory (actually, in the last 20 years). But the conditions were a boon to tourism businesses that relied on cold weather, and their impact can be clearly seen in several of our business indices.

- The average temperature from January to March, 2014 was a chilly minus 11.6 degrees celcius, versus just -6.3 degrees in 2014.
- Total precipitation was 169.2 mm versus 232.6 mm in 2013. However, in January to March, 2014, there was significantly less rain - 47 mm versus 85 mm in 2012.
- Thanks to the reduced rainfall, there was more snow on the ground throughout the season - 64 cm on average, versus just 25 cm in 2012.
- Room occupancy averaged 35.0% from January to March to 32.9% up 6.4%, outpacing Ontario as a whole. Occupancy was 54.9% versus 53.4%, up 2.9%.
- The increase in occupancy did not come at the expense of room revenue. Average room revenue was up 4.1%, just slightly behind Ontario at 5.2%.





Q1



Weather Index

-11.6°C
(-6.3°C in 2012)

Average Temperature

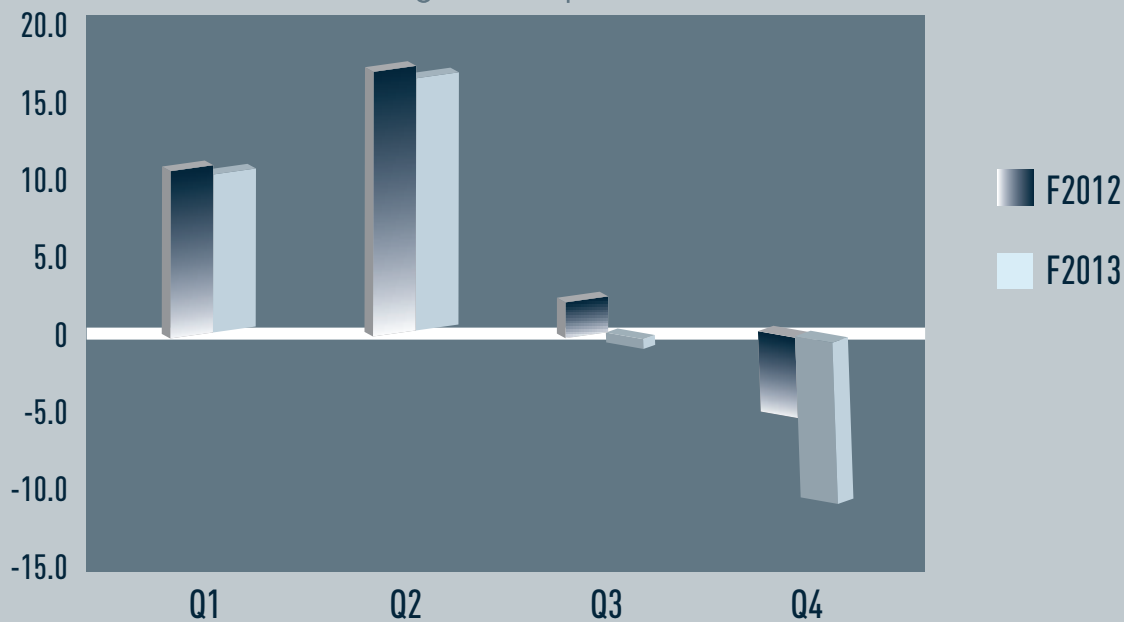
54 days versus
62 in 2012

Days of Precipitation

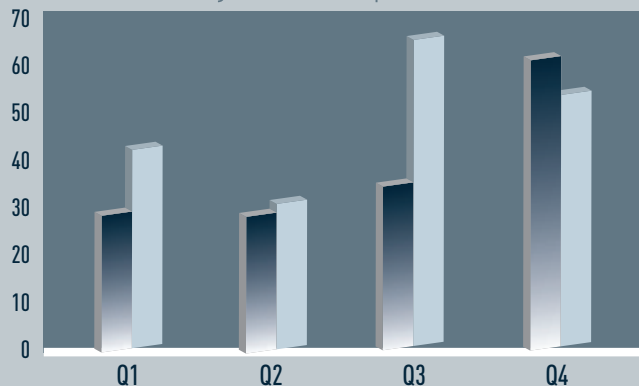
169MM vs 233MM
(twice as much
rain in 2012)

Total Precipitation

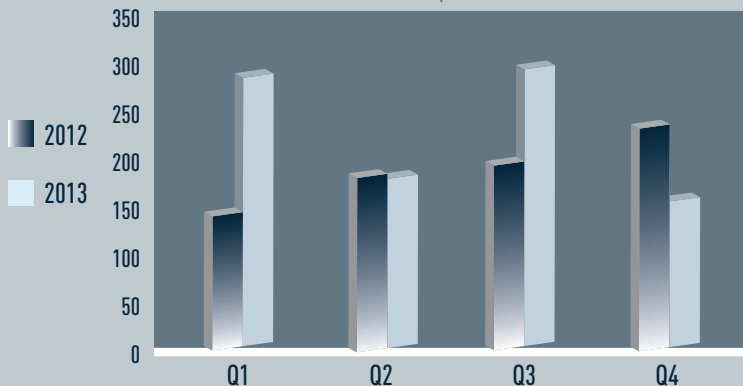
Average Temperature



Days of Precipitation



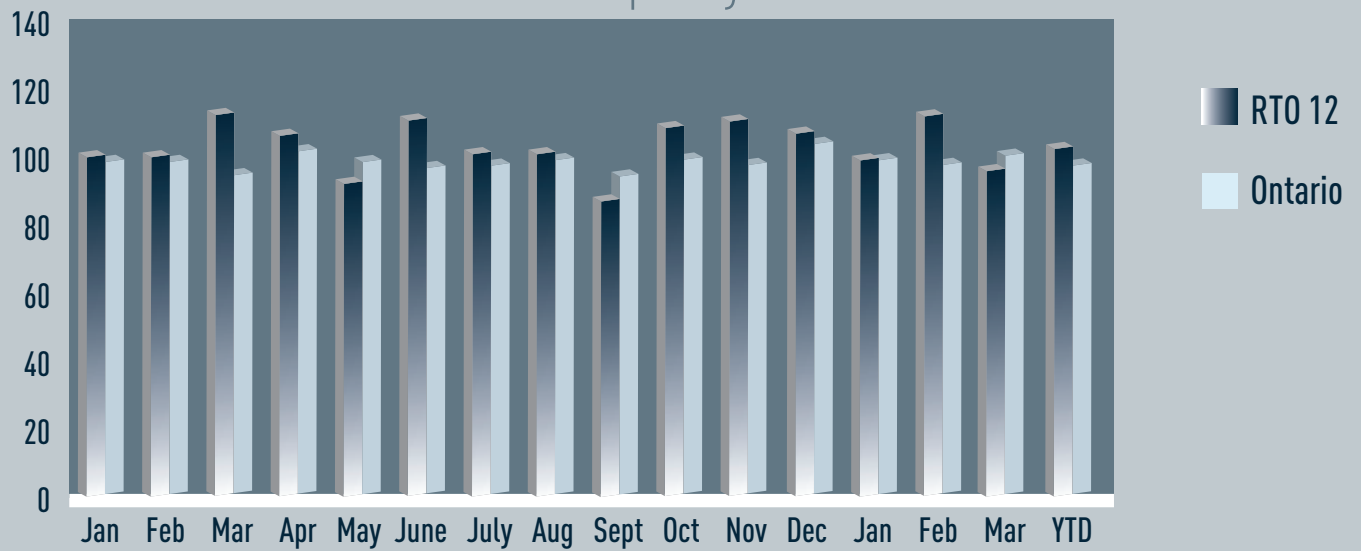
Total Precipitation (MM)



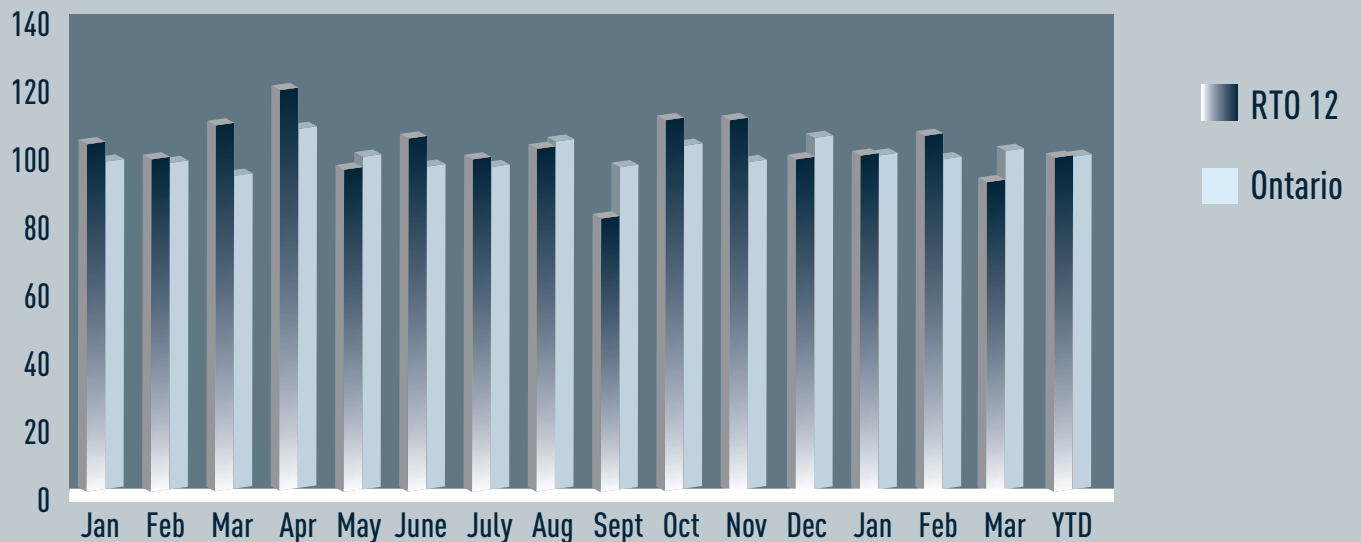


Occupancy Index – Up 2% in Q4, up 5.8% YTD (versus 1.9% in Ontario)

Room Occupancy



Revenue Per Room





Attractions Index – Winter attractions up 99% in fiscal Q4

Winter Attractions Index

