



*Naturally Adventurous*

# RTO 12 Tourism Business Indicators

Fiscal 2015



# Contents

<b>RTO 12 Tourism Business Dashboard</b> .....	3
<b>Overview</b> .....	4
<b>Weather Trends</b> .....	5
<b>Business Indexes</b> .....	6
<b>Parks Indexes</b> .....	12
<b>Google Searches</b> .....	14
<b>Visitor Exit Survey</b> .....	15







## About This Report

The report collates a variety of metrics and – taken together – provide a unique and up-to-the minute read on the state of the tourism industry in RTO 12. Tourism is a vital part of the region’s economy, and accounts for almost 10% of its GDP, and 13% of its total employment. This report is provided as a service to our operators and other stakeholders and is intended to give insight into the general health of the industry.

## Why We Use Indexes

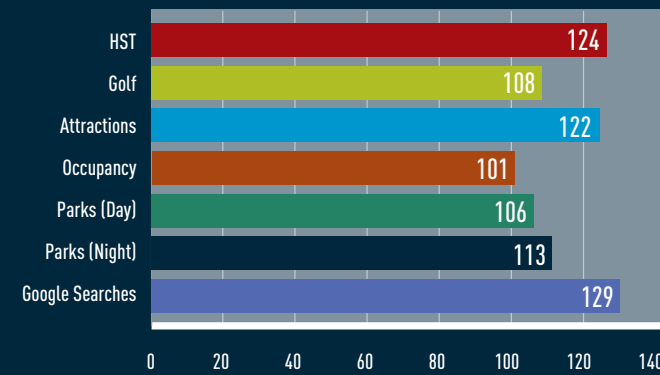
Index numbers are a statistician’s way of expressing the difference between two measurements by designating one number as the “base”, giving it the value 100 and then expressing the second number as a percentage of the first.

Example: In this report, we are using 2013 as the index base. If the total HST collected in our sample was \$110 in 2015, and \$100 in 2014, the HST Index for the region in 2015 will be 110.

Indexes allow us to compare trends across different business metrics, such as HST, room occupancy, golf rounds and entries at attractions.

## RTO 12 Tourism Business Dashboard

RTO 12 – All Indexes for 2015



### HST Index

**RTO 12 HST F2015 receipts up 24% over F2014. Increases have been logged in 3 of 4 quarters in F2015**



### Occupancy Index

**Occupancy, revenue per room, and average daily rate were all up in 3 of 4 quarters in F2015**



### Google Searches

**Searches on key regional terms up 39% over last year**



### Golf Index

**Signs Point to a potential resurgence in golf in the region, with rounds played up 8% over 2014**



### Attractions Index

**Strong performance for attractions operators in all quarters, with gate entrances up 22% this year**



### Parks Index

**Pleasant weather drove a banner year for provincial parks, with day use up 9% and night use up 13%**



### Weather Index

**During the first 3 quarters of F2015, temperatures were significantly higher than in the previous two years, fueling operator results. In the last quarter of fiscal 2015, we recorded one of the warmest winters in years, which negatively impacted business in the region.**



## Overview

### Above Average Temperatures Fuelled Tourism in Summer and Fall F2015

There were two macro factors that significantly impacted the tourism business in RTO 12 in fiscal 2015. One was the weak Canadian dollar. The other, the weather.

The weak dollar benefitted tourism regions closest to the US border, which saw a considerable increase in American visitors. RTO 12 benefitted from the dollar primarily because it kept Canadians from travelling to the US. At the same time, lower gas prices meant that Canadian were more likely to take driving holidays.

Central to RTO 12's market position is the "great Canadian wilderness, just north of Toronto". Outdoor activities are still central to our tourism product proposition. As a consequence, weather has a significant impact on tourism businesses in the region: it can make or break the year. During the first 3 quarters of F2015, temperatures were higher than in the previous two years. This provided operators with a tailwind and most saw record levels of business in 2016.

- Accommodation operators saw an increase in occupancy during the first three quarters of 4.8%, compared to Ontario overall, where operators saw a 1.8% increase
- Attraction operators saw an increase in business of 23% over F2014
- Golf operators in the region recorded an increase in rounds played of 27%
- Regional provincial parks welcomed 10% more day use visitors and 12% more overnight visitors

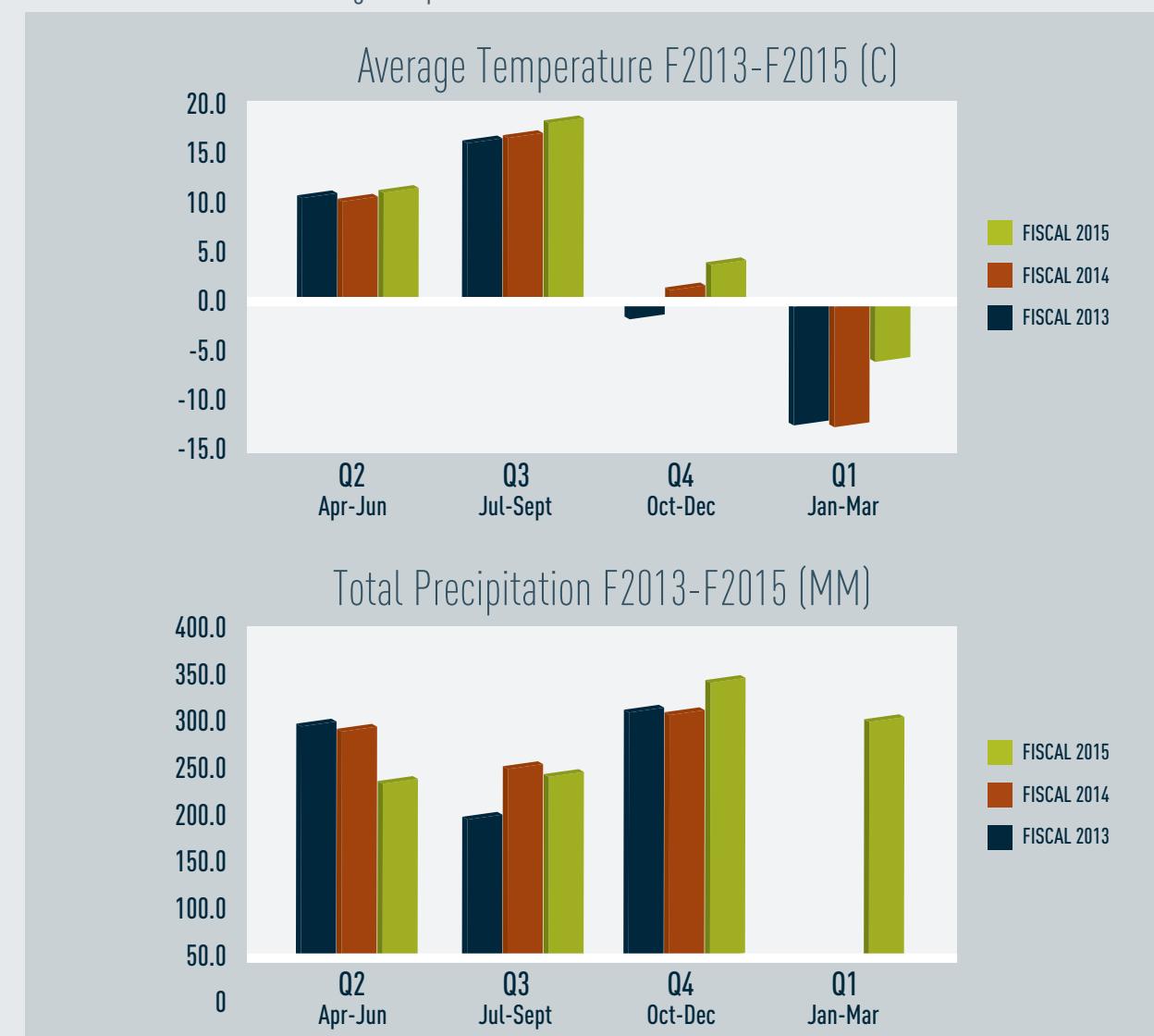
In the last quarter of fiscal 2015, the weather turned against us, and we recorded one of the warmest winters in years. The average temperature from January to March, 2016 was more than 5 degrees higher than in 2015. February, 2015, by comparison was the coldest on record. The unseasonably warm weather means the winter pursuits we promote had fallen off the agenda for many in our target audience.

- Accommodation data for the winter quarter shows occupancy down by almost 13%, compared to Ontario overall which logged a 1.8% increase
- Provincial parks in the region recorded 9% fewer day use visitors
- Attraction operators bucked the down trend, perhaps benefitting from the unseasonably warm weather. The most significant attractions in the region showed an increase of 24% over 2014

## Weather Indexes

### Weather Index

Above Average Temperatures Fuelled Tourism in Summer and Fall F2015



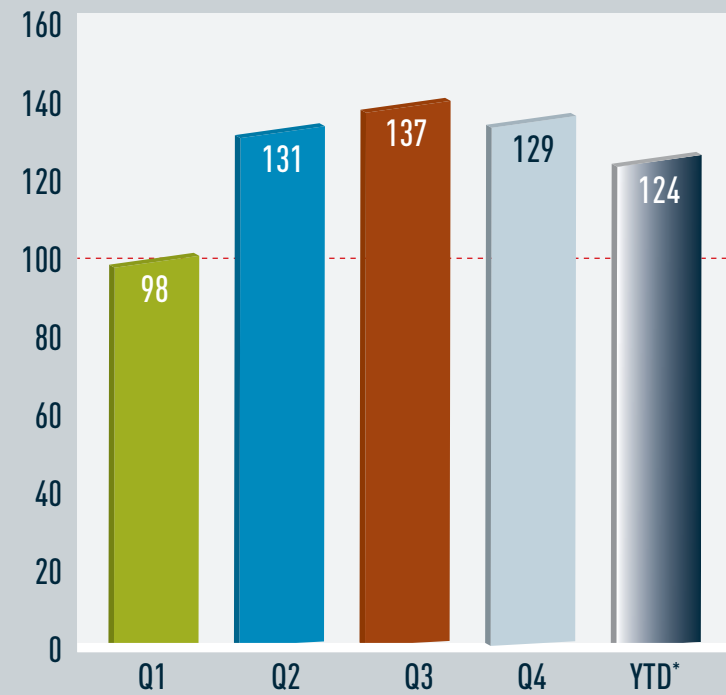




## Business Indexes

### HST INDEX – F2015/F2014

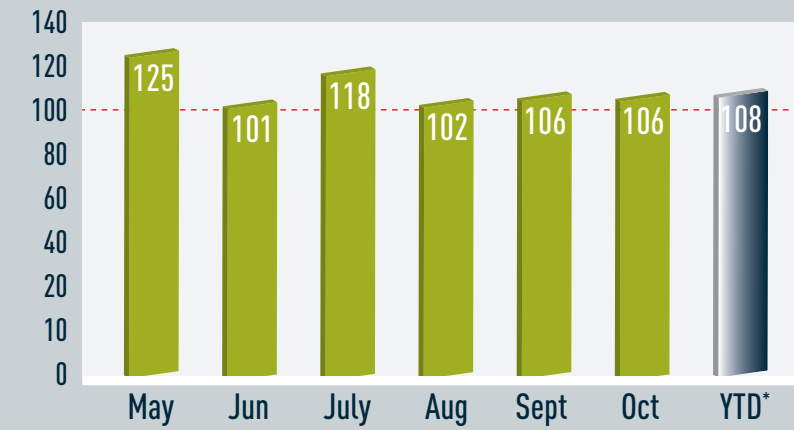
RTO 12 HST F2015 receipts up 24% over F2014. Increases have been logged in 3 of 4 quarters in F2015



18 operators reporting full year data.

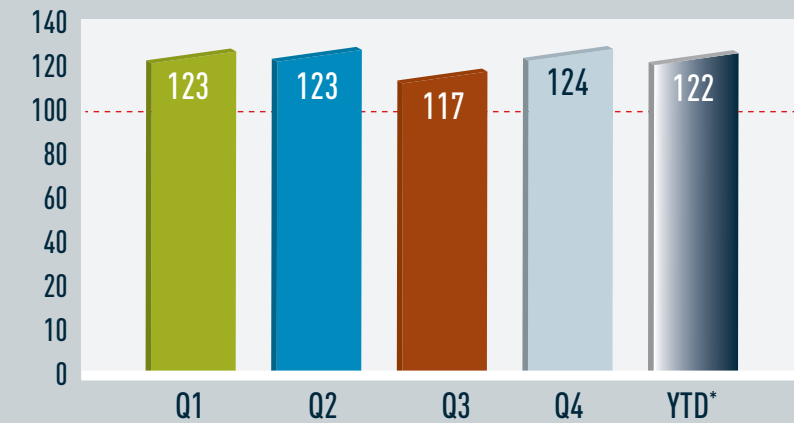
### Golf Index F2015/F2014

Signs Point to a Resurgence



### Attractions Index F2015/F2014

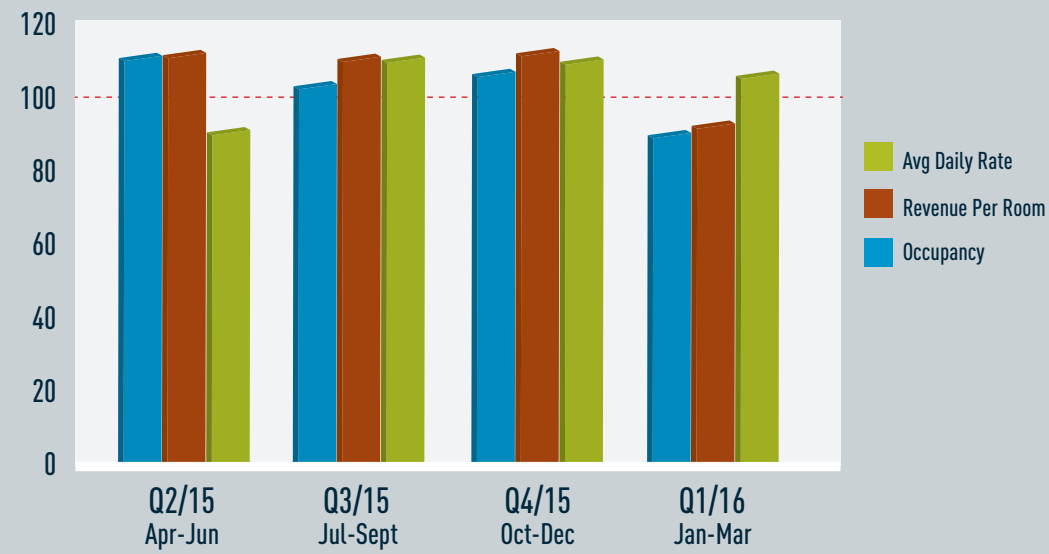
Strong Performance for Attractions Operators in All Quarters





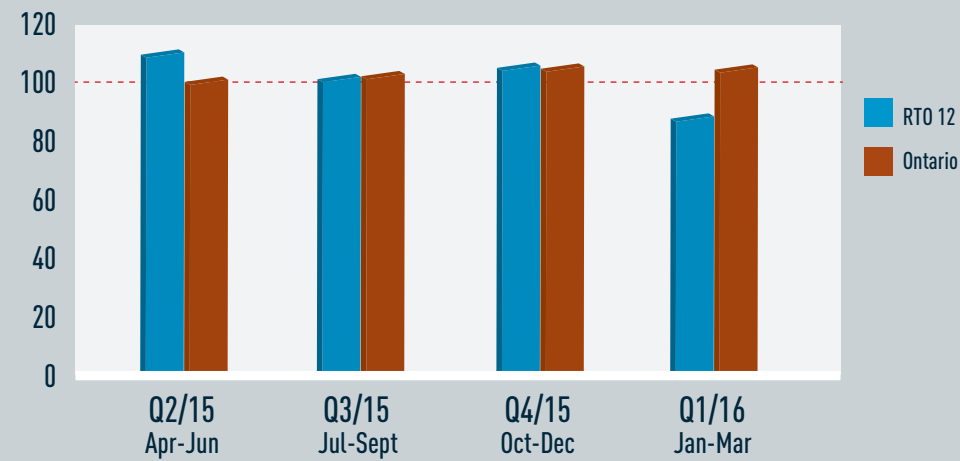
## Room Occupancy and Room Revenue Indexes 2015/2016

Occupancy, revenue per room, and average daily rate were all up in 3 of 4 quarters in F2015

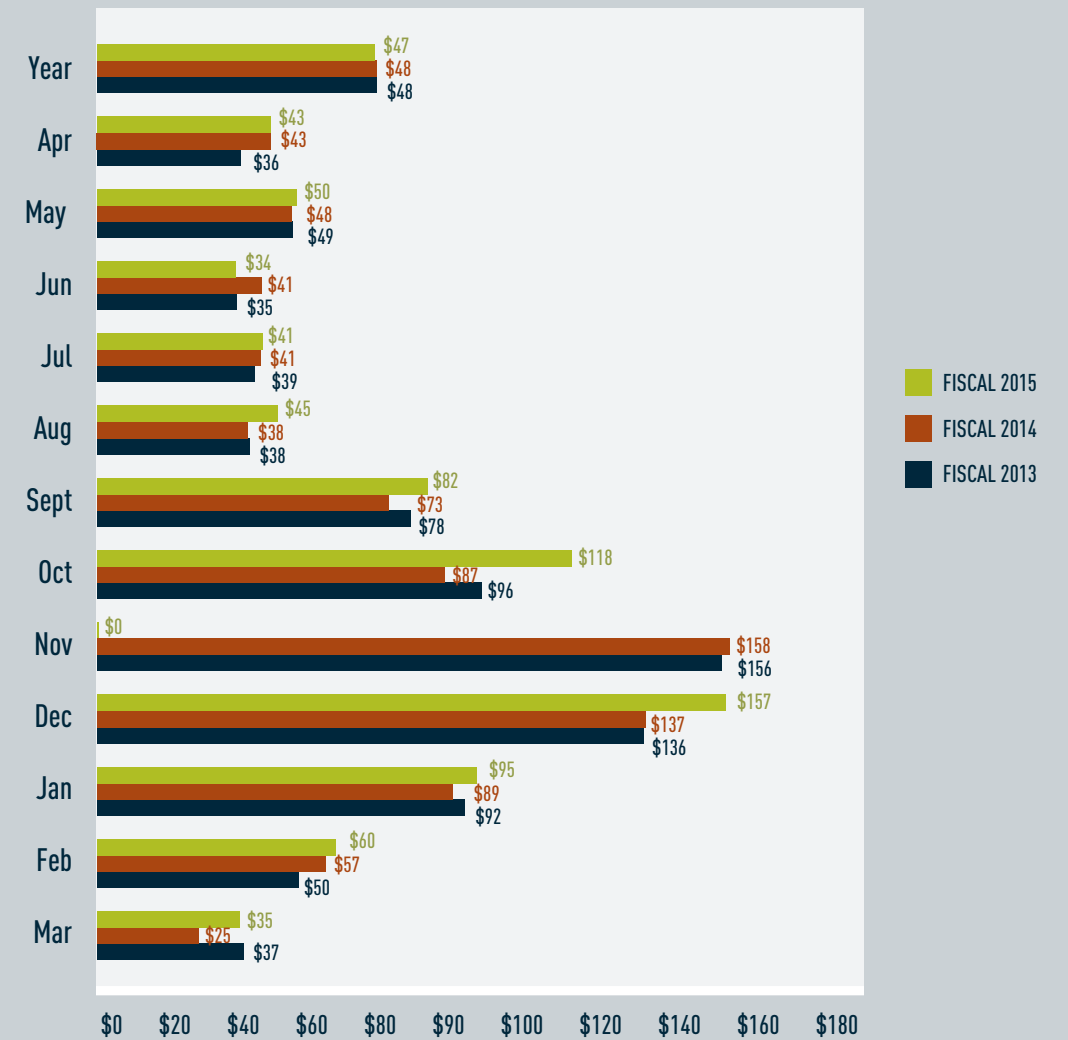


## Room Occupancy Index – RTO 12 versus Ontario – 2015-16

(Index compares current quarter to year previous)



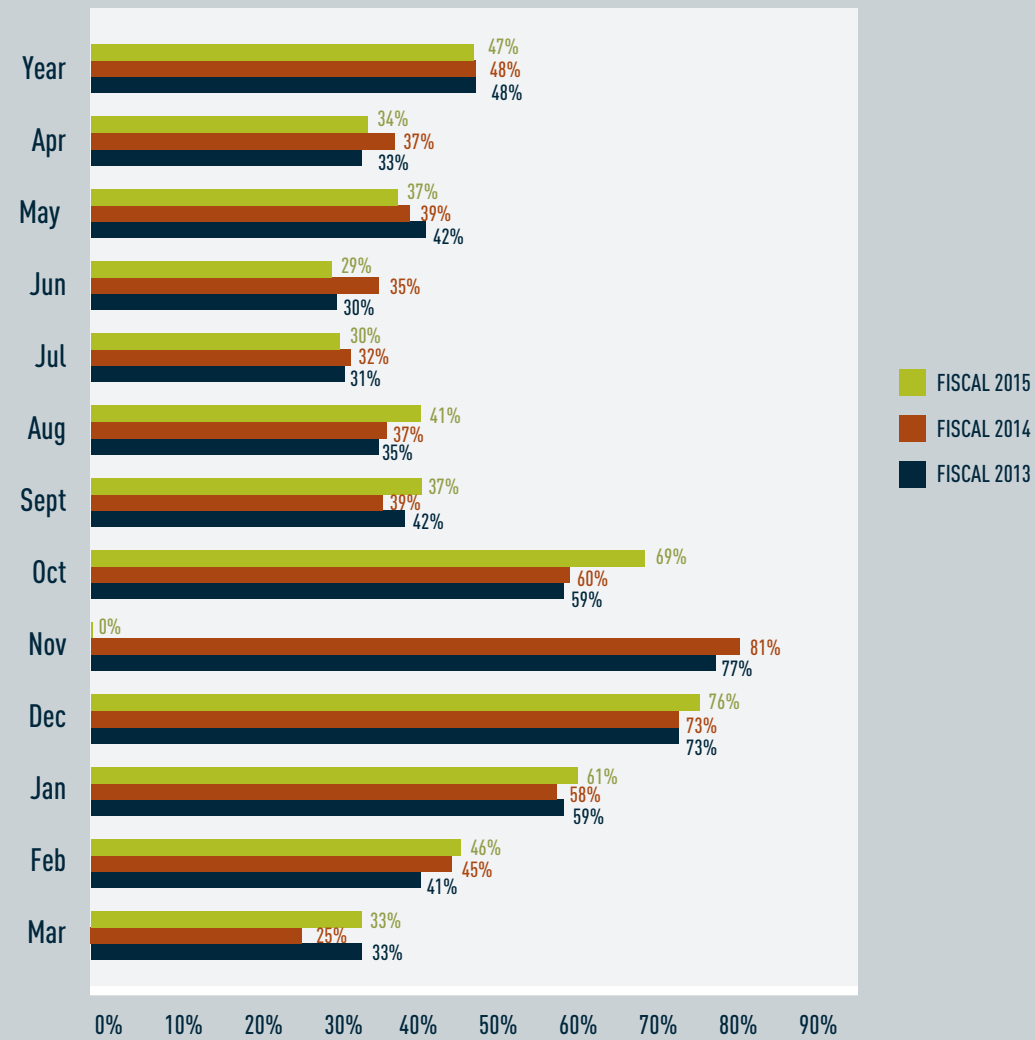
## RTO 12 Revenue Per Available Room F2013-F2015



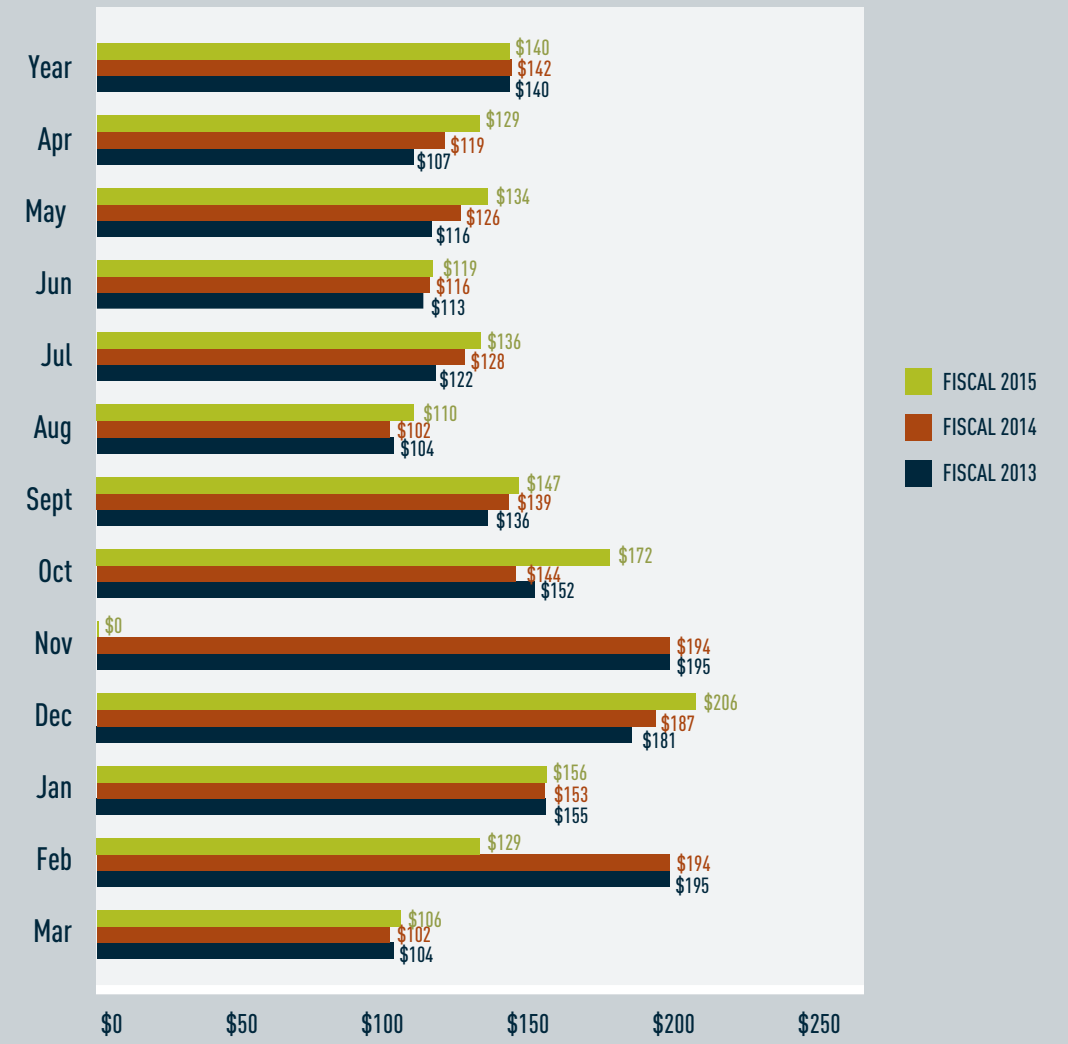




### RTO 12 Room Occupancy Rate F2013-F2015



### RTO 12 Average Daily Rate F2013-F2015

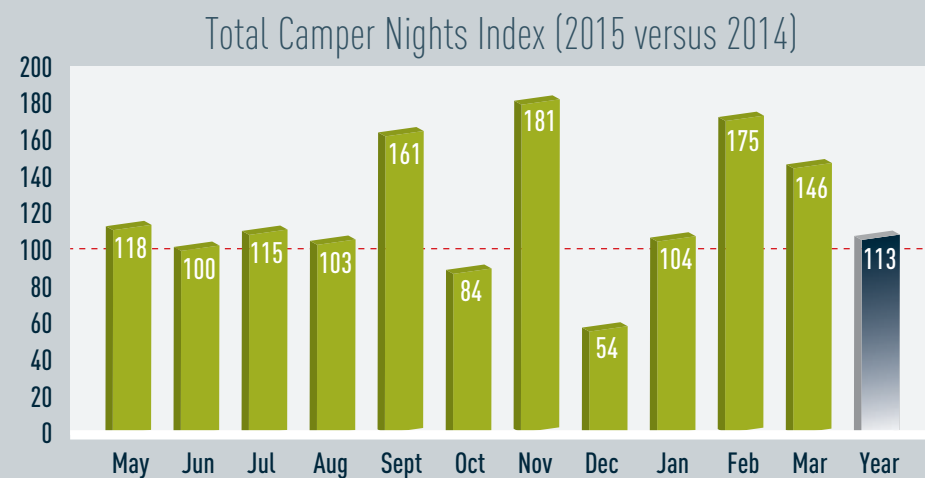
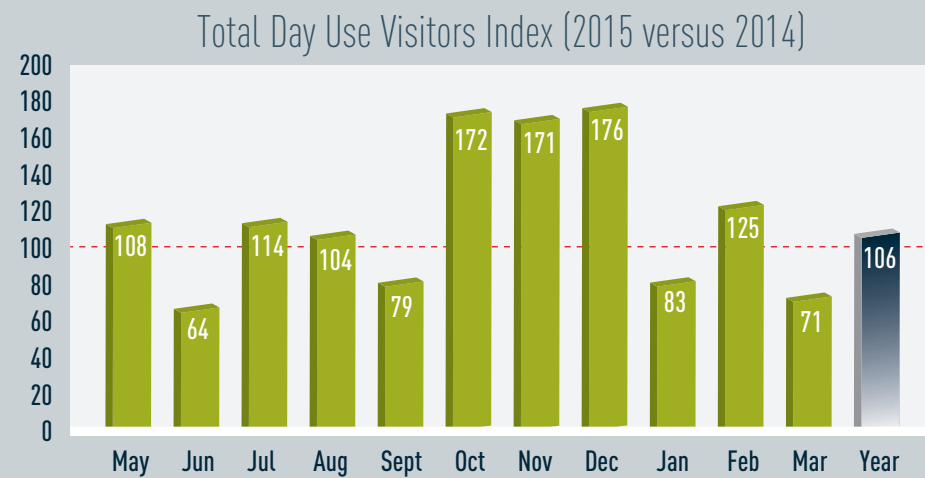




## Parks Indexes

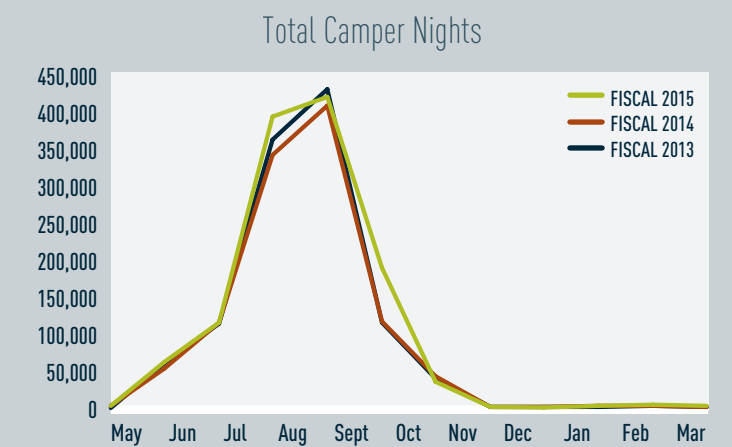
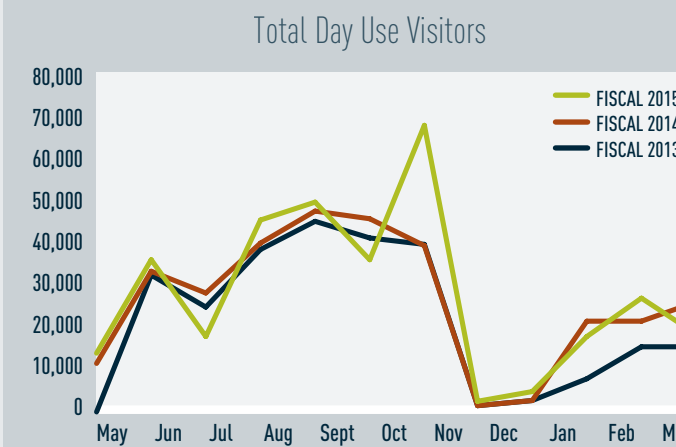
### RTO 12 Parks Index

Pleasant Weather Drove a Banner Year for Provincial Parks Traffic

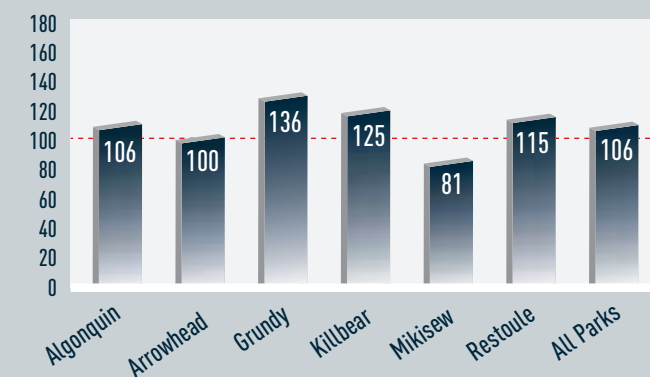


### RTO 12 Parks Index

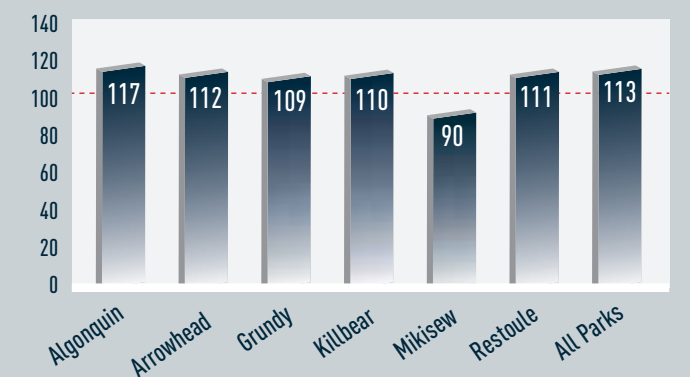
Strong Year for Provincial Parks with all but one reporting increases



#### Total Day Use Visitors Index (By Park, F2014 versus F2015)



#### Total Camper Nights Index (By Park, F2014 versus F2015)







## Google Searches

Google Searches F2015 versus F2014  
 Searches on key regional terms up 39% over last year

KEYWORD	GOOGLE SEARCHES		CHANGE
	F2015	F2014	
Algonquin Park	33,100	27,100	22%
Muskoka	18,100	12,100	50%
Parry Sound	8,100	6,600	23%
Almaguin Highlands	320	260	23%
Loring-Restoule	30	30	0%
<b>Total Explorers' Edge</b>	<b>59,650</b>	<b>46,090</b>	<b>29%</b>

## Visitor Exit Survey

### Key Results 2015 (based on 136 responses)

Visitors to the region are very satisfied with their experiences:  
 100% of respondents would recommend Explorers' Edge to family and friends.  
 99% gave their visits a score of 4 or 5 (out of 5)!

#### Other findings:

- Wilderness is a key motivator for choosing Explorers' Edge: 63% say it was the reason they choose us.
- 99% of respondents said they were either satisfied or very satisfied that with the natural landscape in the region.
- 98% of respondents said they were either satisfied or very satisfied that with things to do and see in the region.
- 97% of respondents said they were either satisfied or very satisfied that with accommodations in the region.
- 94% of respondents said they were either satisfied or very satisfied that with pricing in the region.
- 87% of respondents said they were either satisfied or very satisfied that with packages in the region.

The RTO12 Tourism Business Indicators Report would not have been possible without the participation and cooperation of the many tourism operators that were involved.

***We would like to extend sincere thanks to all of the individuals and organizations that made contributions to this important and provincially-innovative data.***

This report is intended to be an evolving project, and it is the expectation of the Board of Directors for RTO12 that it will continually be enhanced, in order to help all stakeholders evaluate the health of the tourism industry within our region. As we move forward we will work to refine our data collection process to make operator participation as quick and easy as possible.

If you are interested in providing information for this report, the Board of Directors and its governing committees would be extremely grateful for your participation. Please contact Tourism Operators Relations representative Tyler Francis at [tyler@explorersedge.ca](mailto:tyler@explorersedge.ca) or 705.646.7673 for more details.

