



Naturally Adventurous

RTO 12 Tourism Business Indicators

April to September, 2014



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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

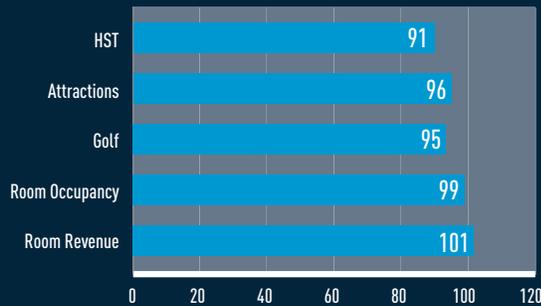
Index numbers are a statistician’s way of expressing the difference between two measurements by designating one number as the “base”, giving it the value 100 and then expressing the second number as a percentage of the first.

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



Despite Poor Weather, Tourism in RTO 12 Showed Signs of Strength.



Down 9% over 2013

HST Index



Occupancy down marginally by 1%, revenue per room up 1%

Occupancy Index



Over 5,200 social media mentions of Explorers' Edge and RTO 12 members

Social Media Monitor



Down 5% over 2013

Golf Index



Down 4% over 2013

Attractions Index



495 (384 in 2013)

Exit Survey



12°C (13.9 in 2013)

Weather Index

65 (60 in 2013)

Average Temperature

311 MM (207 in 2012)

Days of Precipitation

Total Precipitation



Overview

Despite Weather and Consumer Confidence Headwinds, Tourism in RTO 12 is Vital and Strong

No matter what the season, RTO 12 relies heavily on outdoor activities to attract visitors (67% of visitors partake in outdoor/sports activities while in the region). Therefore one of the biggest factors affecting tourism is the weather, and 2014 is a year in which the weather has worked for, and against, business in the region.

The record breaking cold winter of 2014 was a boon to RTO 12, with January and February the busiest months at accommodation operators in years (up a full 10% over 2013). However, that same weather pattern lead to a cooler, wetter summer: for example, in July of 2013 there were seven days when the temperature exceeded 30 degrees; in 2014 there were none.

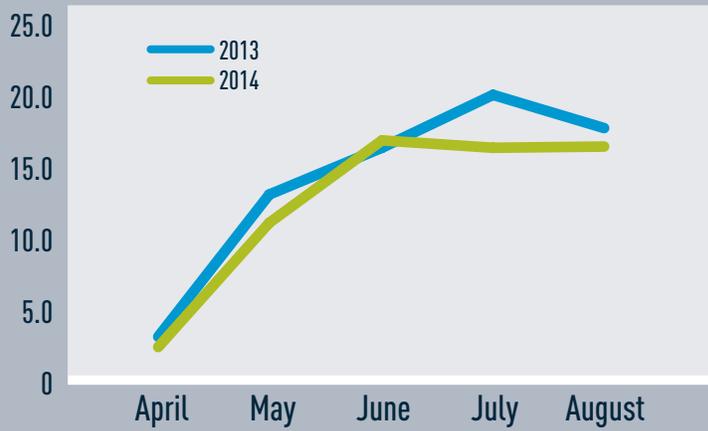
Given the importance of the outdoors to the RTO 12 tourism proposition, it is not surprising that the weather this summer has impacted businesses like golf courses and attractions. Both reported lower activity than 2013. However, despite the inclement weather, the summer ended on a high note, with accommodations operators reporting a very strong month – up over 5% over 2013!

These results highlight an opportunity to promote indoor activities related to arts/culture and dining to our SW Ontario target audience. With its new content marketing strategy, RTO 12 has recently committed to raising awareness of these activities across our digital platforms.

In addition to the weather, consumer confidence in Ontario must also be considered. While it has improved since the recession of 2008/2009, consumer confidence is still in negative territory with respect to employment, and neutral with respect to major purchases (house, car, vacations, etc.). As RTO 12's tourism trade depends largely visitors from Ontario (they account for 95% of visits), this pessimism has a direct impact on our tourism industry receipts.

Weather Trends 2013/2014

Mean Daily Temp (C)
Summer 2014 was colder than 2013



Total Precipitation (MM)
2014 significantly wetter than 2013

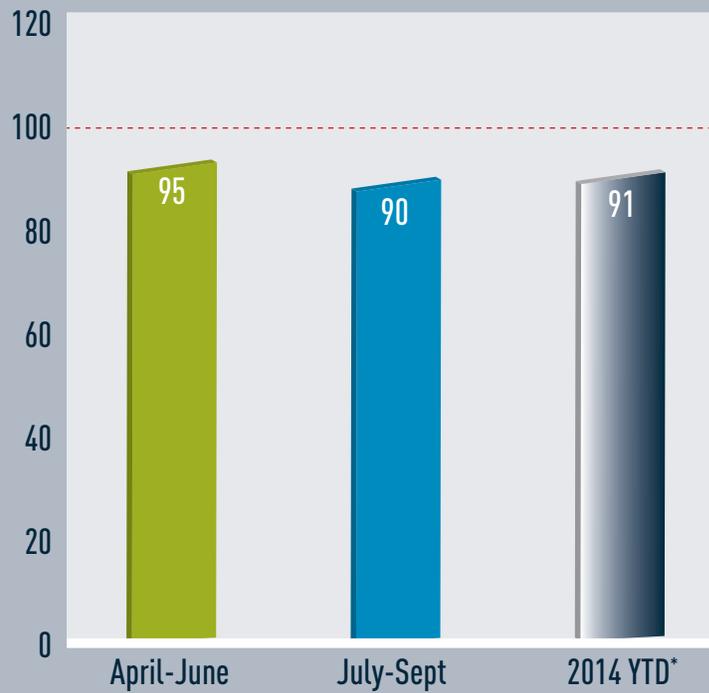




Business Indexes

HST Index 2013/2014

HST receipts are down 10% with 8 of 13 operators in sample reporting a decrease over 2013



*YTD refers to RTO 12's fiscal year, starting April 1, 2014

Golf Index 2013/2014

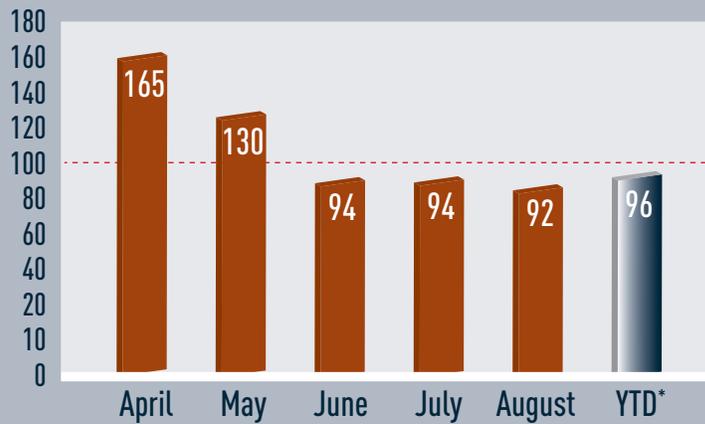
Rounds of golf down this season is down by 5%, consistent with reporting from the National Golf Course Owners Association Canada



*YTD refers to RTO 12's fiscal year, starting April 1, 2014

Attractions Index 2013/2014

Marginal decrease in admissions in 2014 (4 operators reporting)

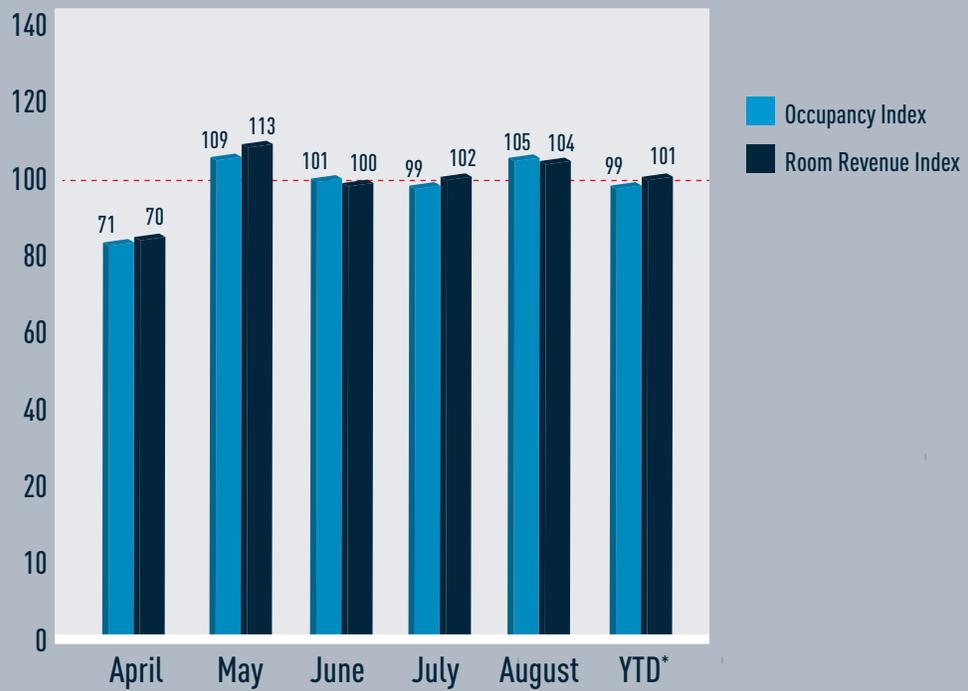


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Room Occupancy and Room Revenue Indexes 2013/2014

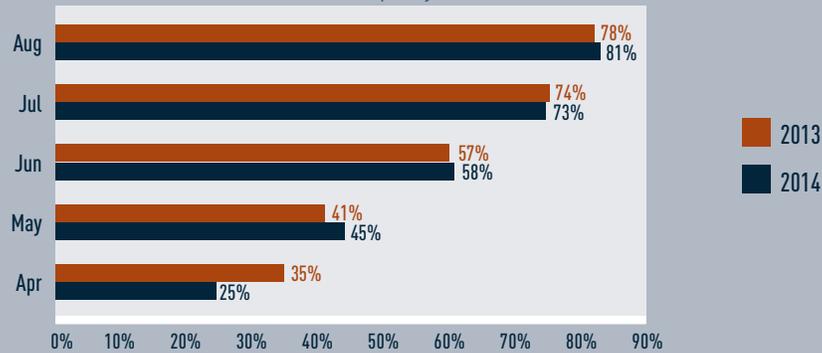
YTD the room occupancy index is down marginally as a result of a weak April. August was a strong month, up 5% over last year (18 operators reporting)



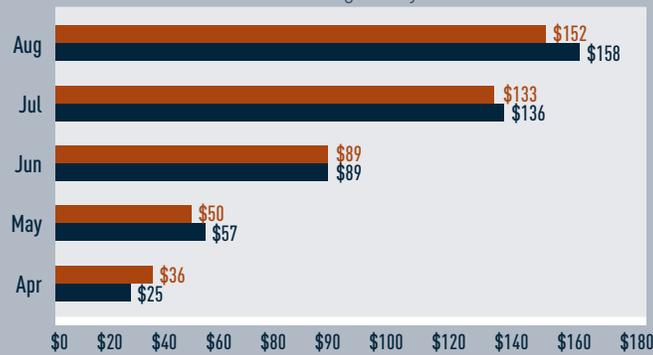
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Accommodations Report for April to September, 2014

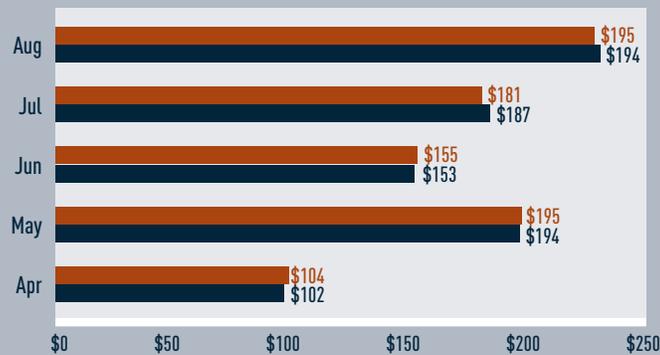
RTO 12 Room Occupancy Rate



RTO 12 Average Daily Rate



RTO 12 Revenue Per Available Room

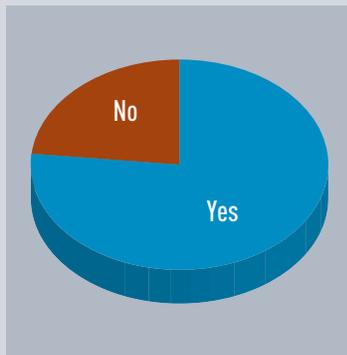




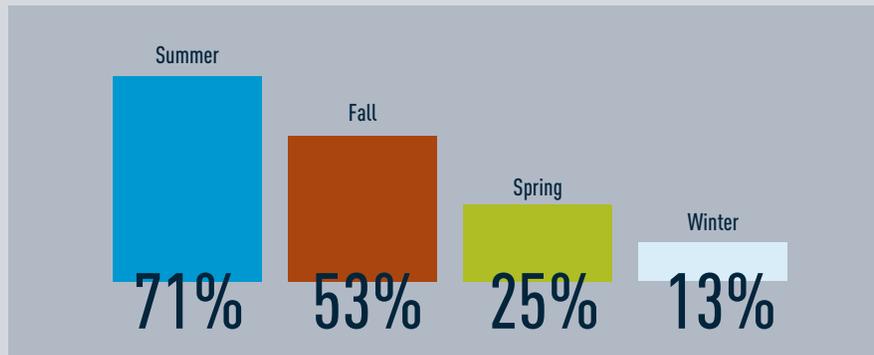
Visitor Exit Survey

100% of Visitors Would Recommend Explorers' Edge to their friends and family!

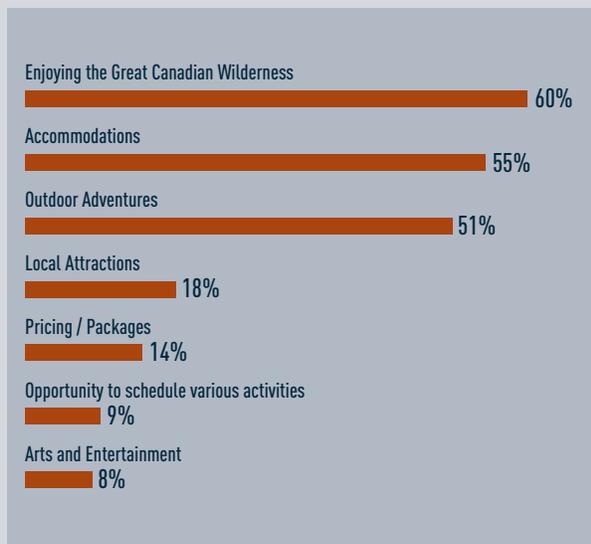
Have you visited before?



Have you considered visiting in:



Why did you choose EE?

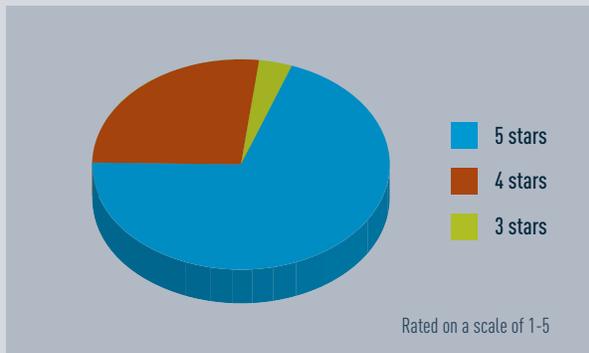


How did you research your trip?

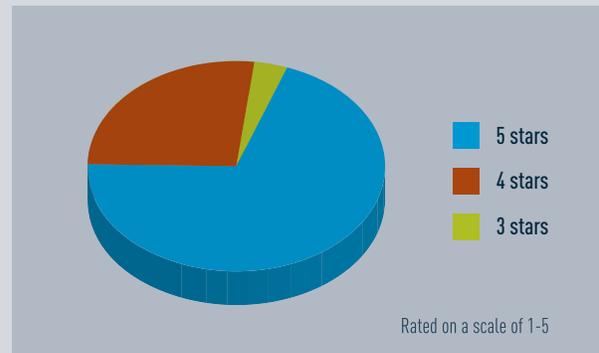




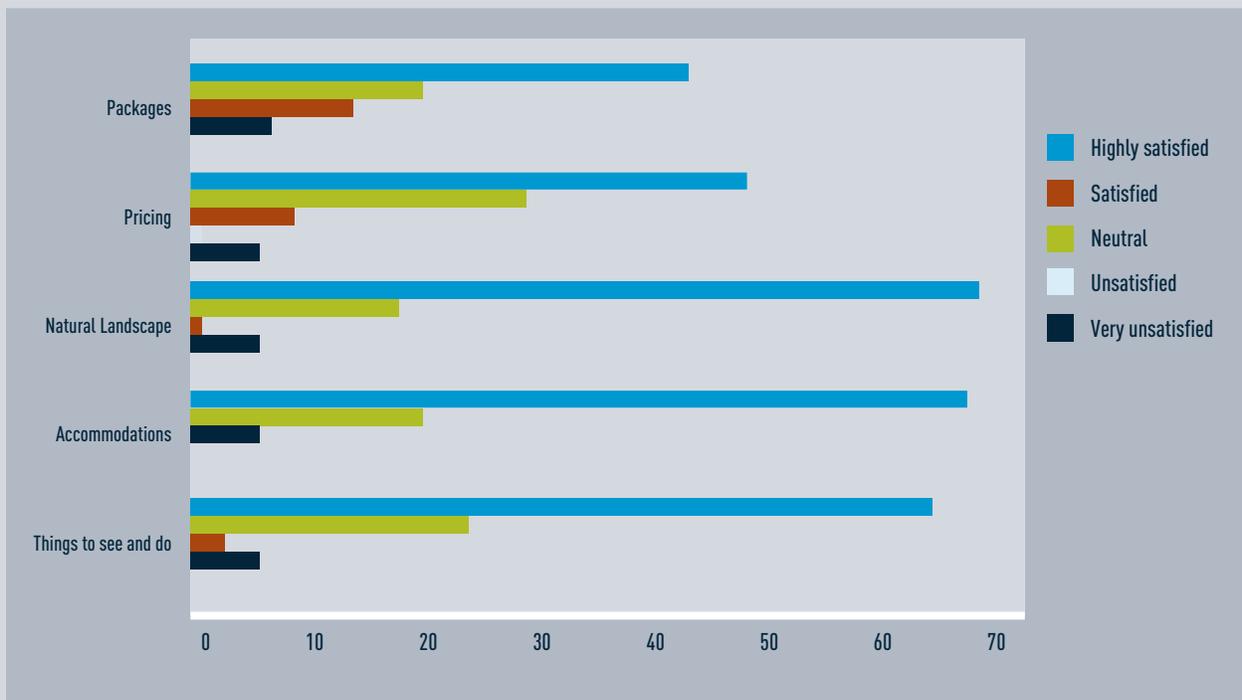
Rate your current visit



Rate your experience



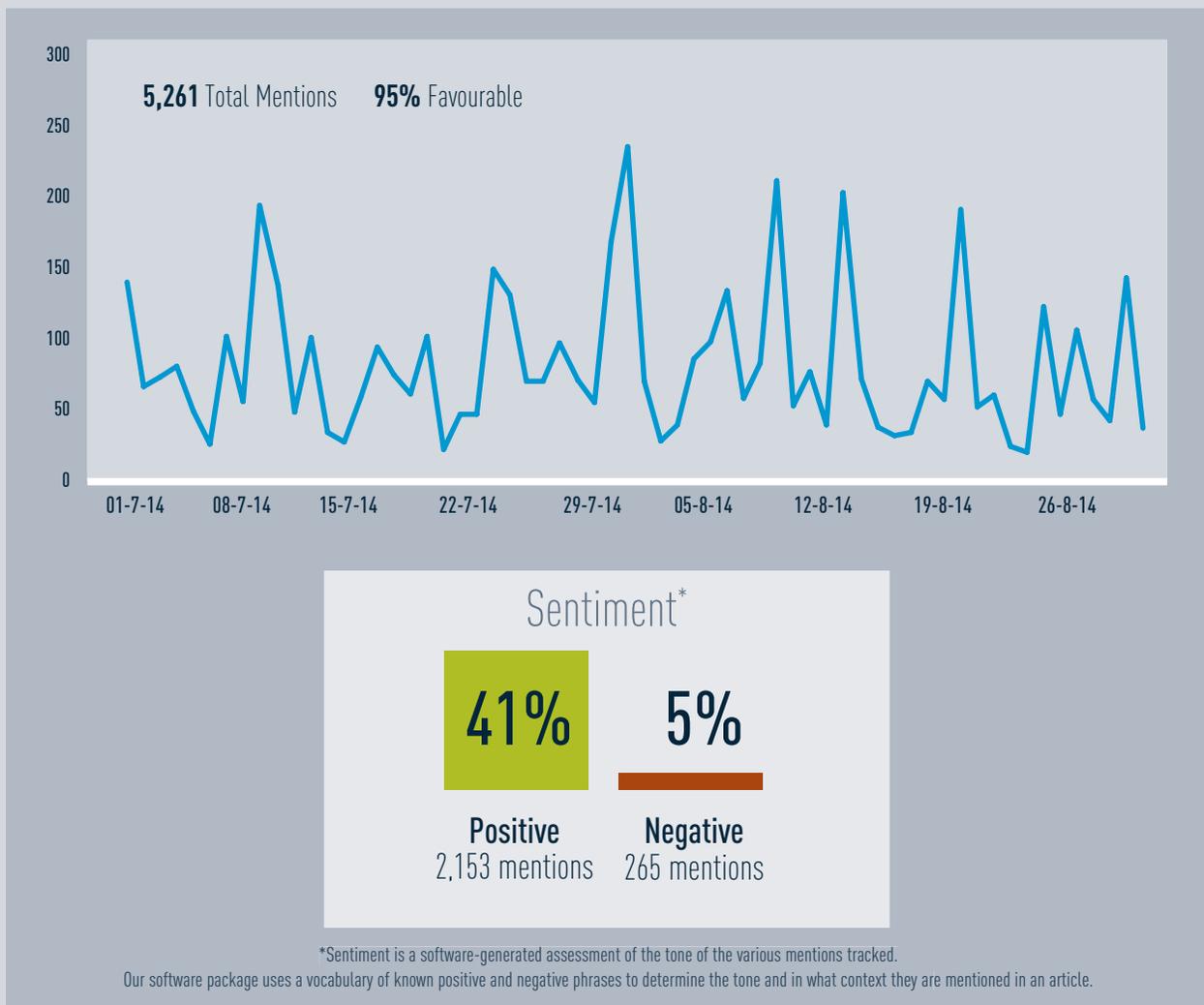
How satisfied are you with Explorers' Edge on each of the following?





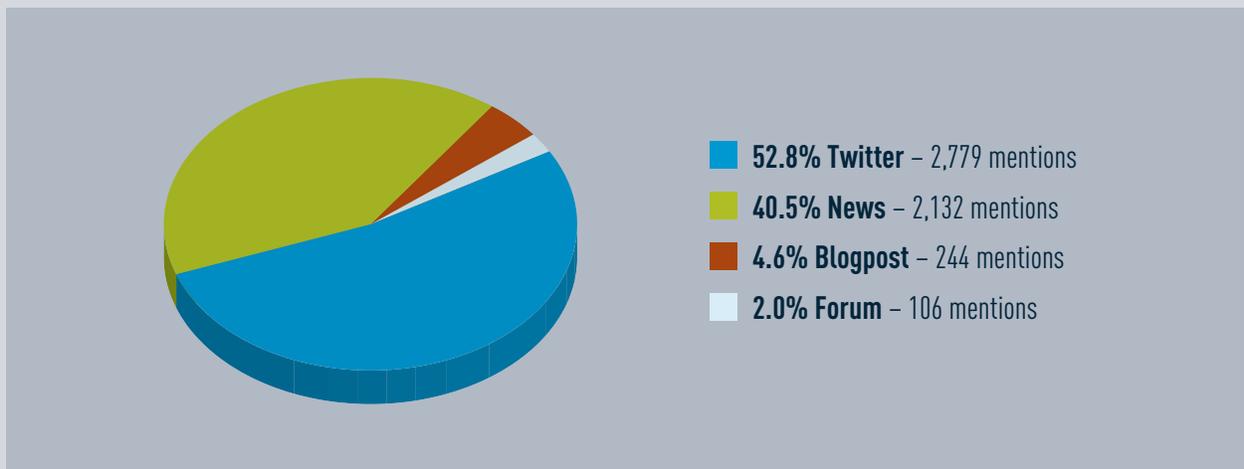
Social Listening

Over 5,200 social media mentions of Explorers' Edge and RTO 12 Members, from July 1 to August 31, 2014





Over 5,200 social media mentions of Explorers' Edge and RTO 12 Members, from July 1 to August 31, 2014



Facebook Activity, April 1 to August 30

- New Page Likes: 7,285
- Total Likes to date 60k
- Shares: 858
- Comments: 1,032
- Post Likes: 19,174
- Clicks to Website: 83,647

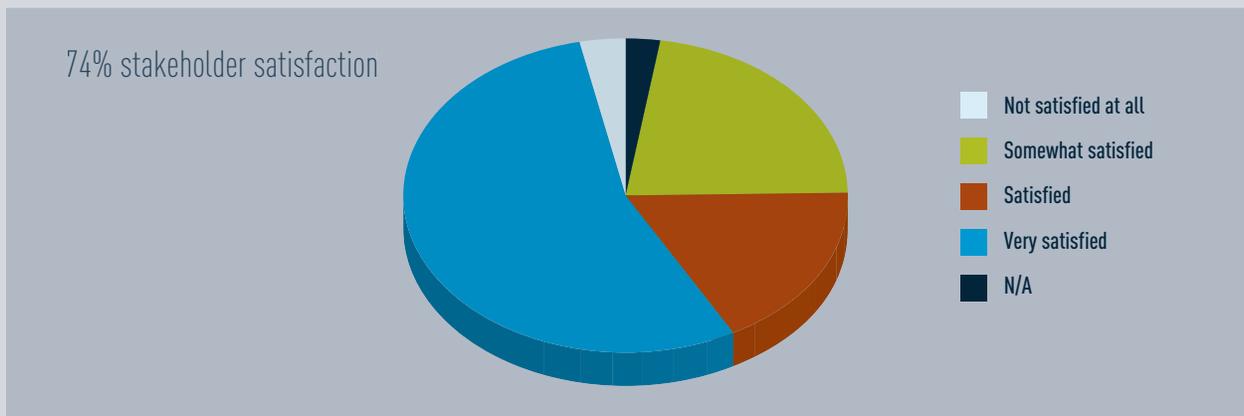


2014 RT012 Stakeholder Survey

“The combination of (RTO 12’s) product development and marketing initiatives has produced tremendous results because they have served the region in tandem”

~ RTO12 Operator

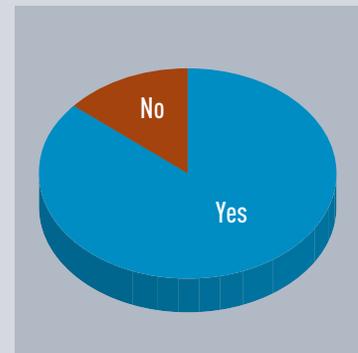
How satisfied are you with the RTO activities and initiatives in your region?



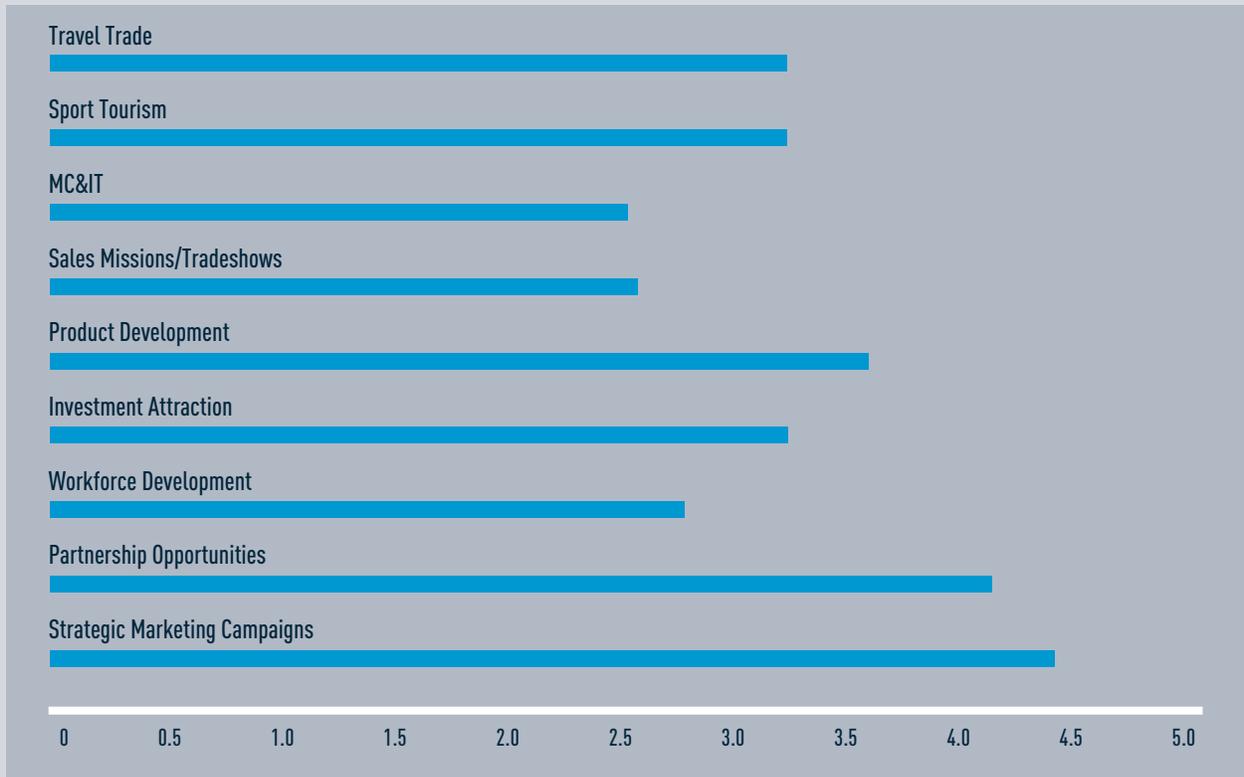
What type of tourism stakeholder do you best represent?



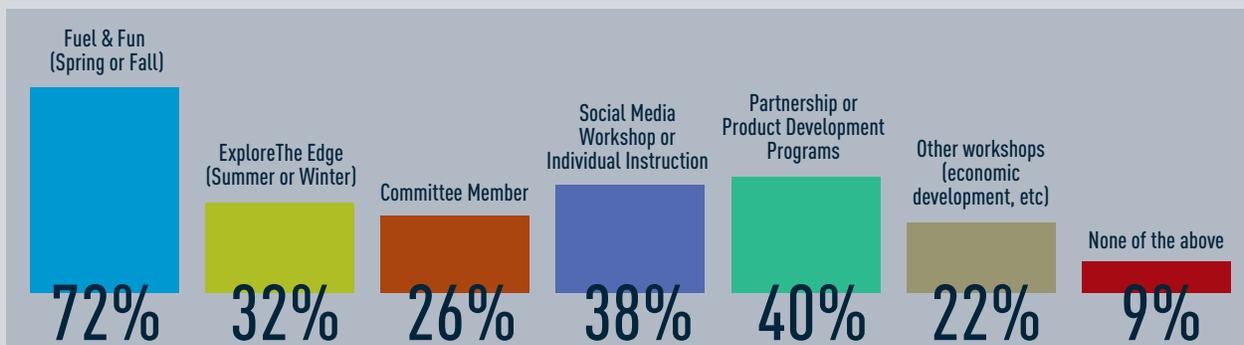
Have you partnered or collaborated with the RTO to promote and grow tourism in the region?



Which areas would you like the RTO to collaborate more on to grow tourism in your region?
 1 = "Least Important" and 5 = "Most Important"



Did you participate in any of the following in the previous fiscal year? (2013-2014)





2012 Regional Travel Statistics

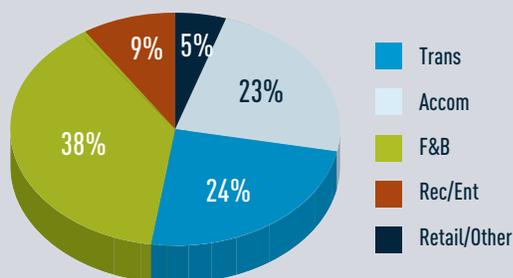
Economic Impact of Tourism

- Visitor Spending = \$596 M
- Total GDP = \$366 M, 9.0% of Region 12's GDP
- Total employment = 6,200 jobs, 13.0% of Region 12's employment
- Total tax revenues = \$194 M; \$96 M federal, \$81 M provincial and \$17 M municipal

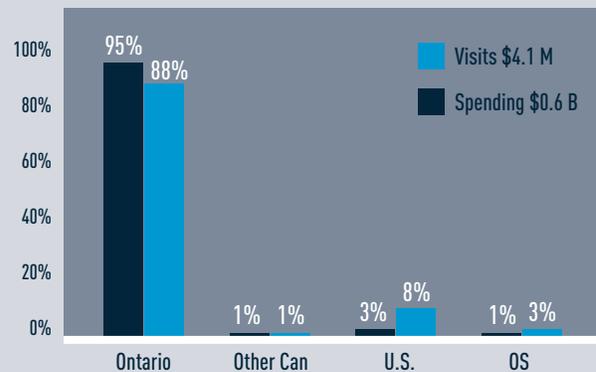
Region	Visits (millions)	Visitor Spending (\$ billions)
Region 12	4.1	0.6
Region 12 % of Ontario	2.9%	2.7%

Region 12 is the 13th largest Region in terms of visits and 12th largest in terms of spending.

Spending by Category



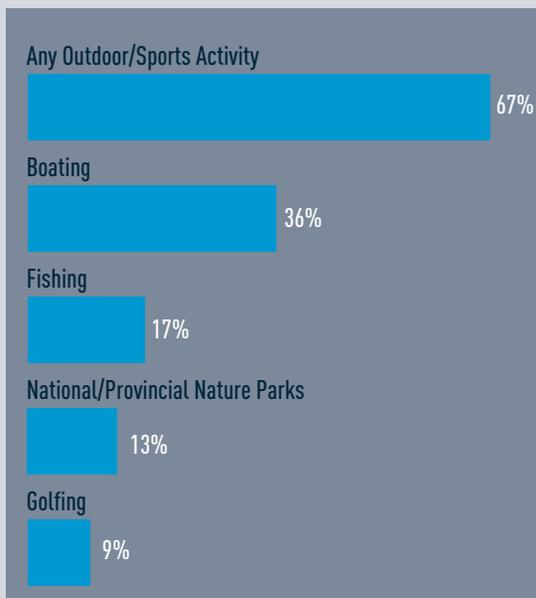
Visits and Spending by Origin



Source: Statistics Canada's Travel Survey of the Residents of Canada and International Travel Survey; PKF Consulting, MTCS

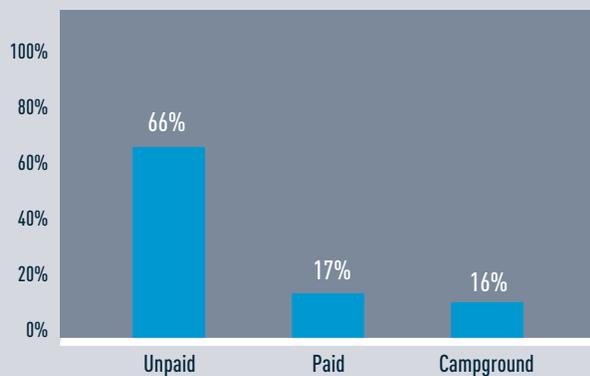


Activities



- Most trips are for pleasure (70%) or to visit friends and relatives (24%)
- 70% of trips are overnight; overnight visitors stay an average of 3.0 nights
- Visitors spend an average of \$144/trip (same-day \$83/trip, overnight \$170/trip)
- 54% of visits occur in Jul-Sep, 30% in Apr-Jun

Accommodation Type



- Hotel Occupancy in Region 12 was 45%; Average Daily Rate was \$155
- Region 12 is home to 11 provincial parks which had 48-88% summer occupancy at its over 4,000 campsites

Source: Statistics Canada's Travel Survey of the Residents of Canada and International Travel Survey; PKF Consulting, MTCS

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 or 705-646-7673 for more details.

