



Naturally Adventurous

RTO 12 Tourism Business Indicators

January to March, 2015



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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

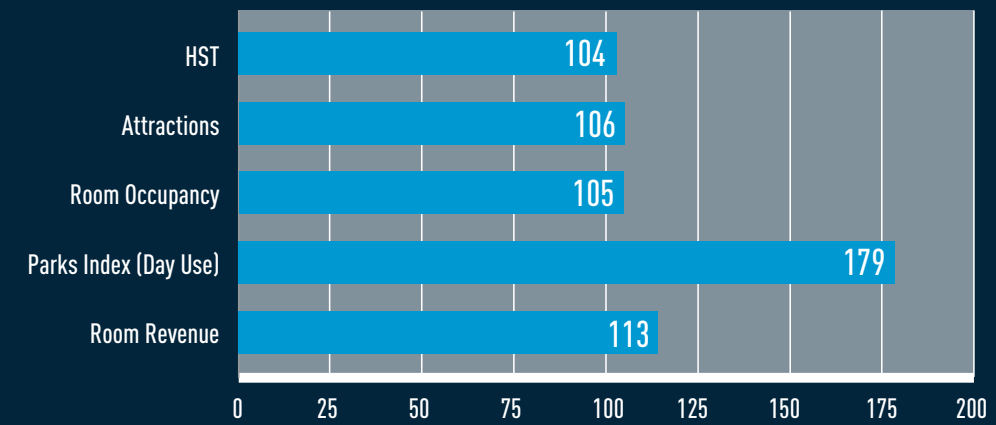
Index numbers are a statistician’s way of expressing the difference between two measurements by designating one number as the “base”, giving it the value 100 and then expressing the second number as a percentage of the first.

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 Q1, 2015



A strong quarter with all indices up in Q1. Favourable winter weather conditions and the Arrowhead Ice Trail appear to have had a positive impact on results.



Up 4% over Q1/2014

HST Index



Up 5% over Q1/2014

Room Occupancy



Over 7,000 social media mentions of Explorers’ Edge and RTO 12 members

Social Media Monitor



Up 79% over Q1/2014 due to strong performances by Arrowhead and Algonguin Parks

Parks Index (Day Use)



Up 6% over Q1/2014

Attractions Index



Another cold winter with average temperatures almost identical to 2014

Weather Index



Overview

Q1/2015: An Outstanding Start to the Year

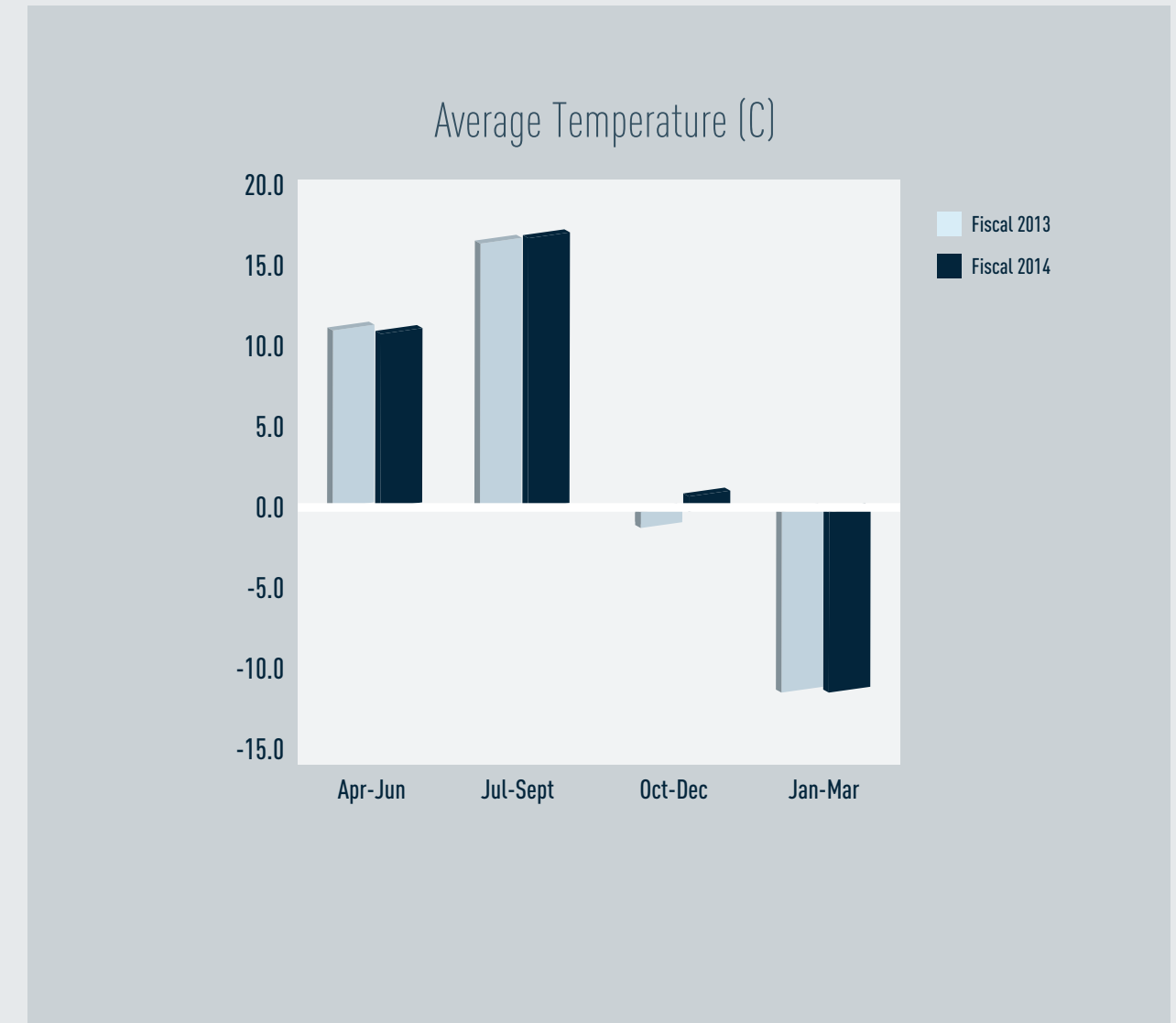
As always, one of the biggest factors affecting tourism in RTO 12 is the weather. The winter of 2015, while cold and snowy, was conducive to the outdoor pursuits for which the region is known, and this was reflected in virtually all our indices.

Year to date, RTO 12 is outpacing the rest of Ontario, where room occupancy is virtually flat in Q1/2015. (The Ontario result is surprising given that the CTC is reporting a 6% increase in overnight visitors from the USA.)

But the big story of winter 2015 in RTO 12 is the Arrowhead Ice Trail. Thanks to extensive coverage by Toronto media of the park's winter amenity, and promotion on ExplorersEdge.ca (where Ice Trail stories got over 100,000 views), the park welcomed over 51,000 day use visitors from January to March, a 100% increase over 2014. The Ice Trail's success underscores the importance of major attractions, and their effectiveness in driving results for the entire region during a traditionally low period in the region.

Weather Indexes

Weather Index
Another cold winter encouraged outdoor activities

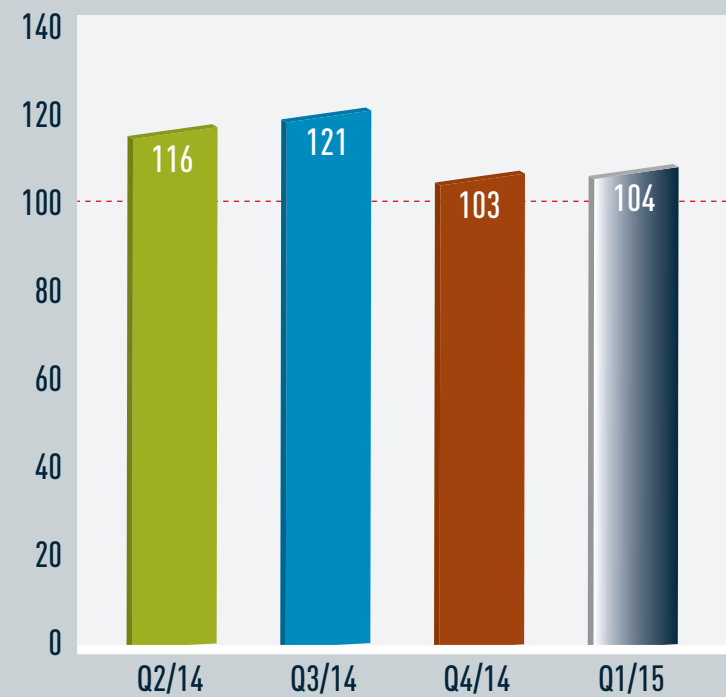




Business Indexes

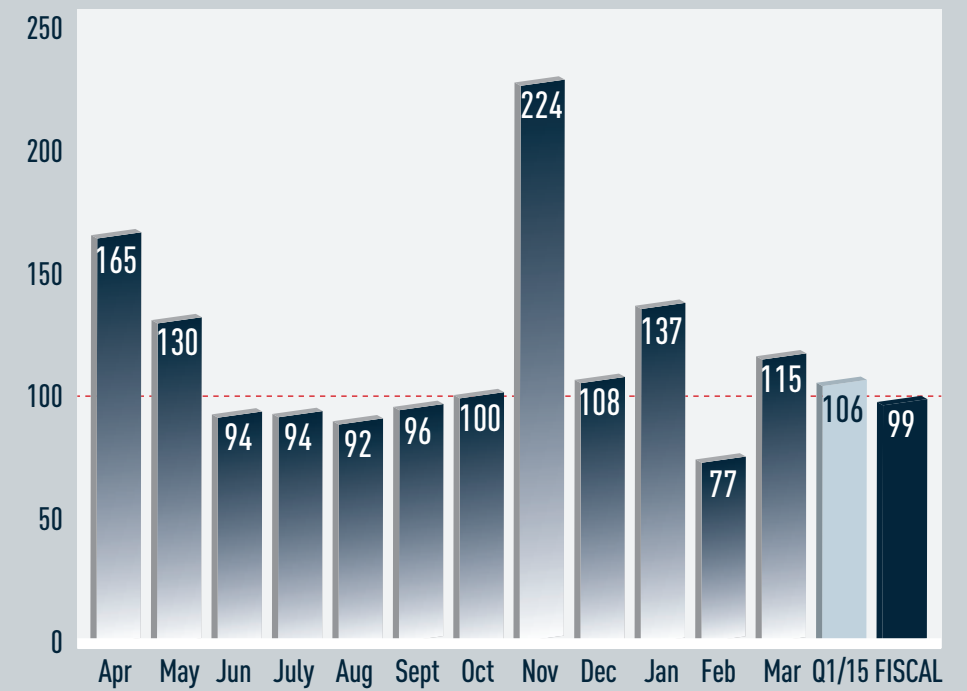
HST Index 2014/2013

RTO 12 HST receipts up 4% over Q1/2014. Increases have been logged in 4 of the last 4 quarters.



Attractions Index – By Month April 2014 to March 2015 (6 operators reporting)

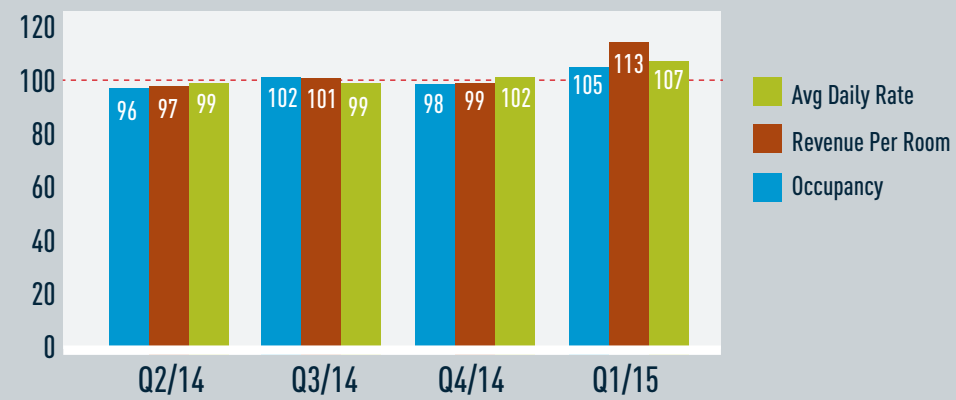
Winter attractions report 6% increase in attendance over previous year



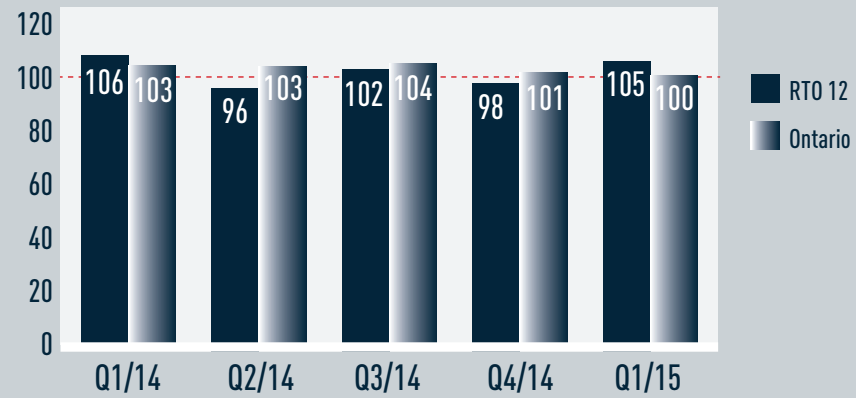
(Index compares current month to same month year prior)



Room Occupancy and Room Revenue Indexes 2014/2015
Occupancy, revenue per room, and average daily rate were all up by more than 5% in Q1, significantly outpacing Ontario as a whole.

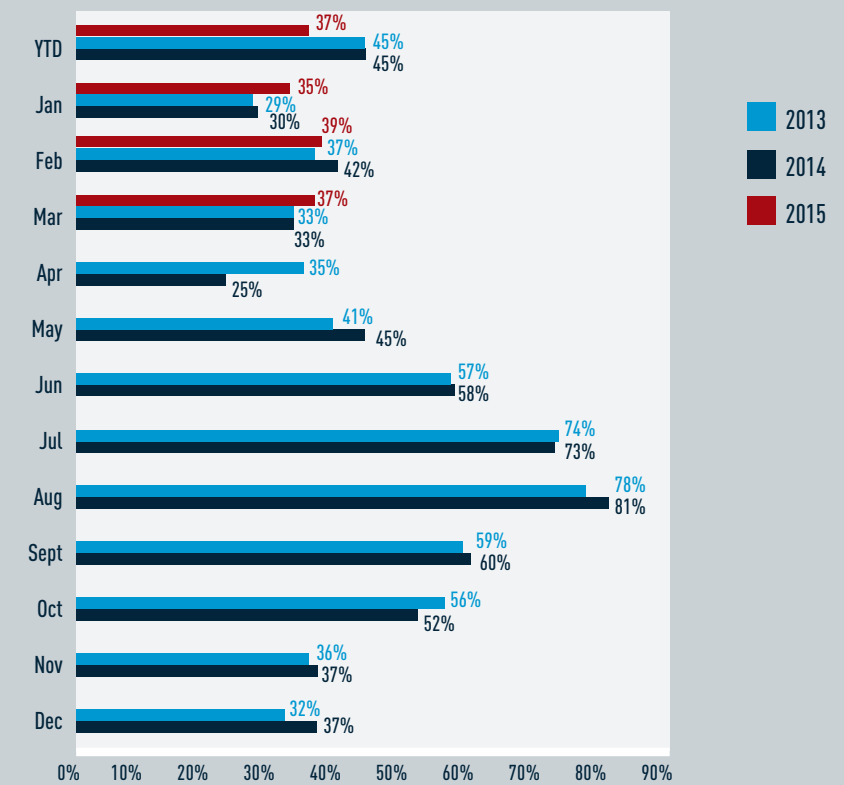


Room Occupancy Index – RTO 12 versus Ontario – 2014-15



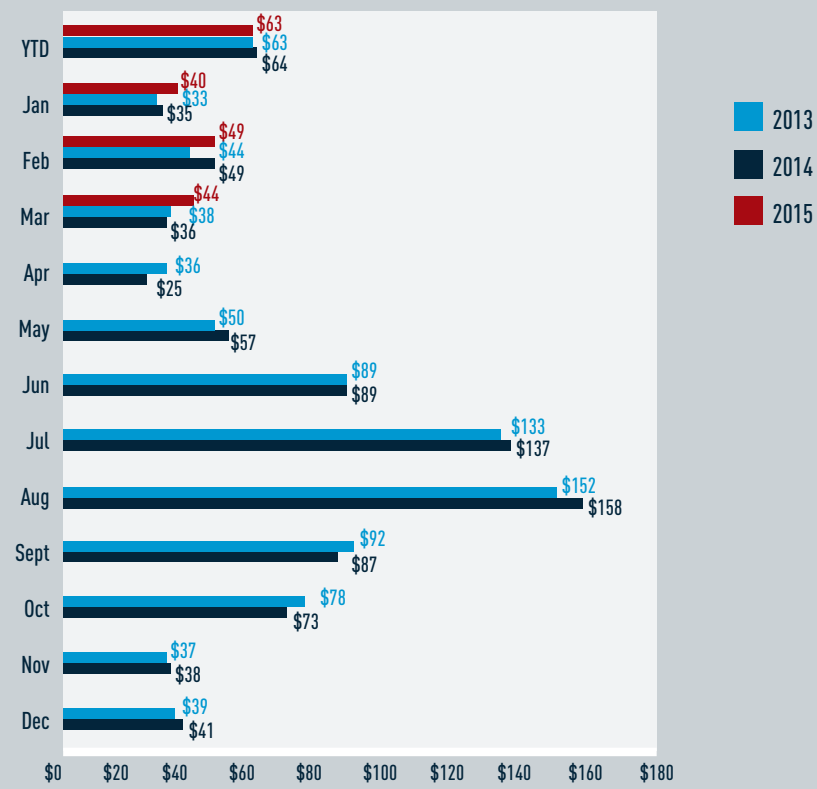
(Index compares current quarter to year previous)

RTO 12 Room Occupancy Rate 2013 - 2015

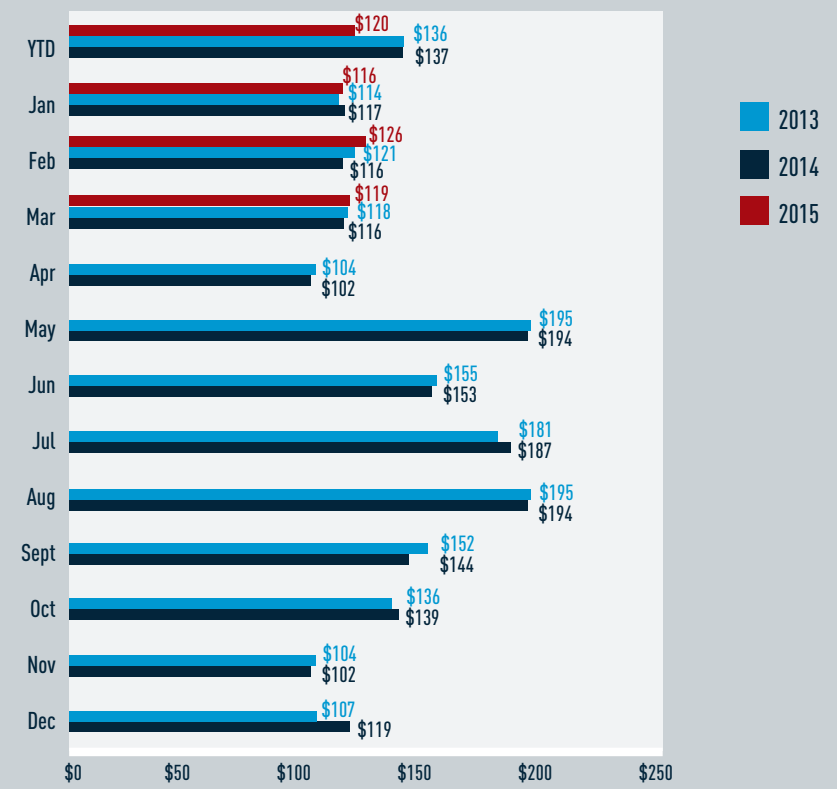




RTO 12 Revenue Per Available Room 2013 - 2015



RTO 12 Average Daily Rate 2013 - 2015



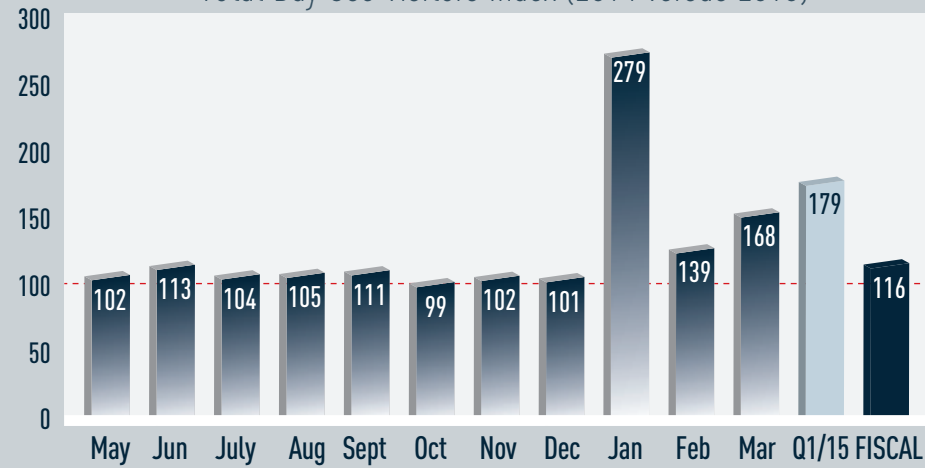


Parks Indexes

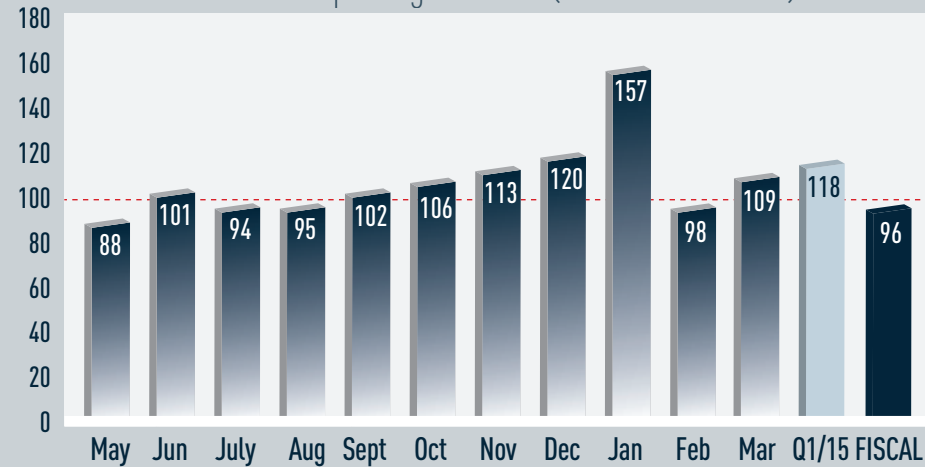
RTO 12 Parks Index

A Blockbuster Winter for Parks Usage, Thanks to the Arrowhead Ice Trail!

Total Day Use Visitors Index (2014 versus 2013)



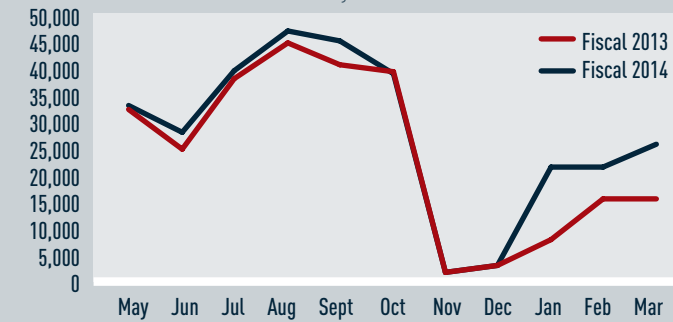
Total Camper Nights Index (2014 versus 2013)



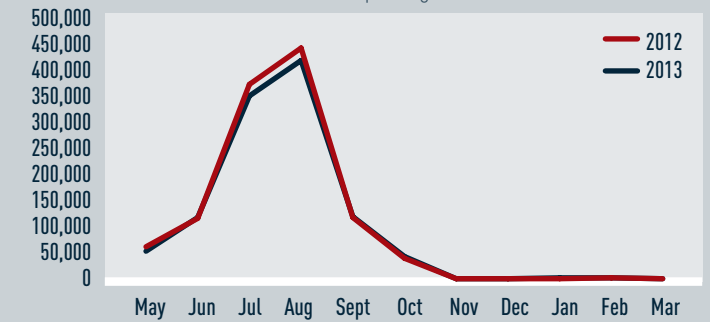
RTO 12 Parks Index

Strong year for Arrowhead and Algonquin Park offset decreases in other parks

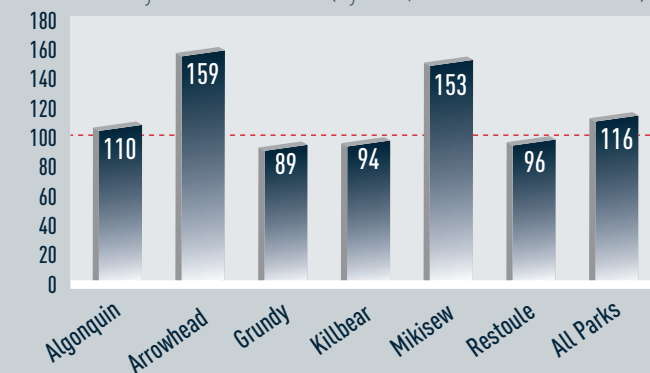
Total Day Use Visitors



Total Camper Nights



Total Day Use Visitors Index (By Park, Fiscal 2013 versus 2014)



Total Camper Nights Index (By Park, Fiscal 2013 versus 2014)

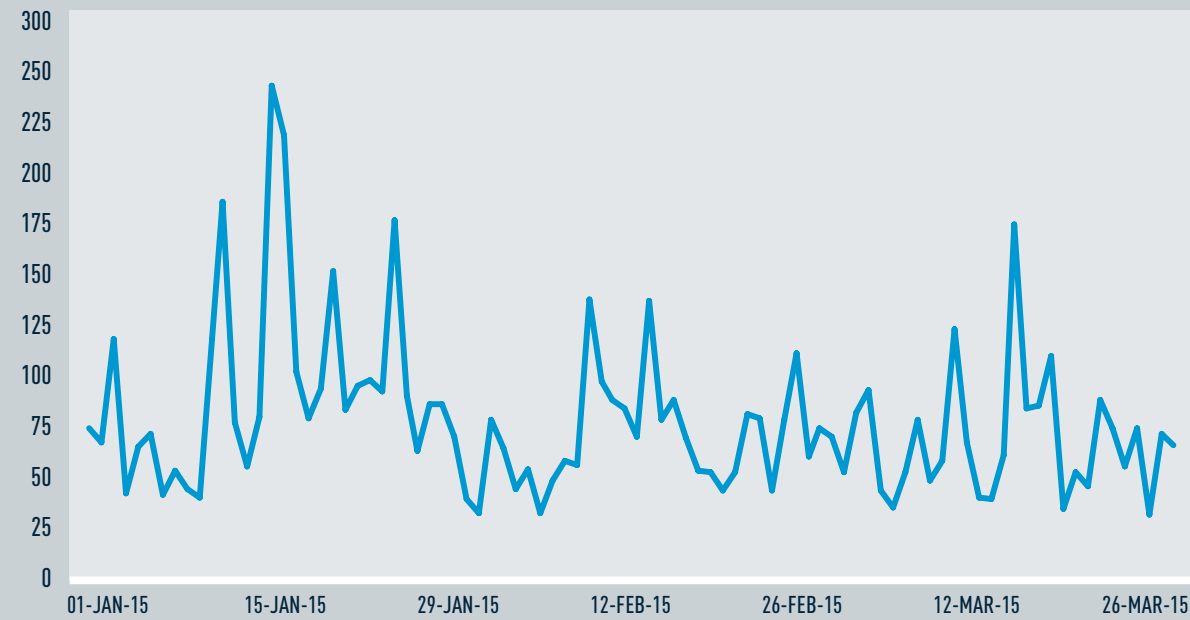




Social Listening

Over 7,000 mentions of Explorers' Edge and Regional Operators!

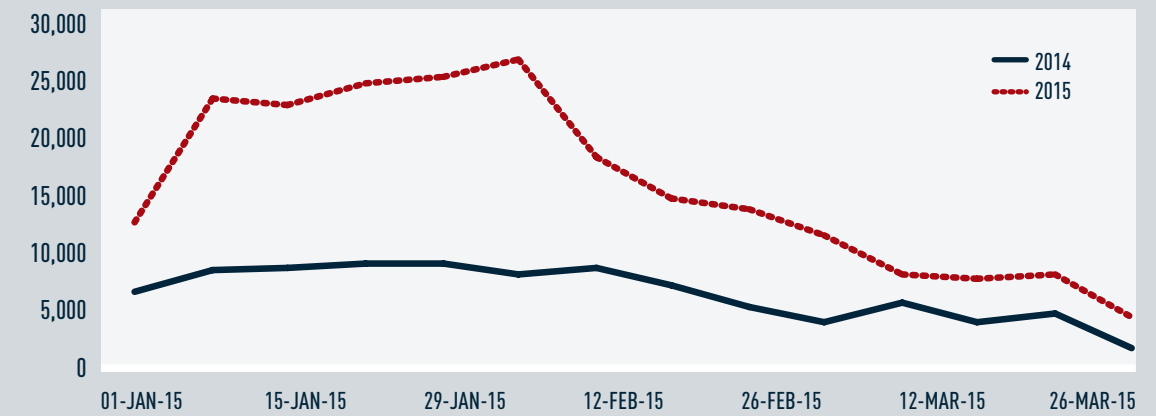
12% of Mentions Were for the Arrowhead Ice Trail



RTO 12/Explorers' Edge

Explorer's Edge Website Traffic Up 253%!

Weekly Site Traffic – 2014 versus 2015



Facebook

- Facebook Page Likes as of March 31: 67,644, up 3,640 or 6%
- Total impressions for Facebook Posts: 4.4 million
- Facebook Post Comments: 4,919
- Facebook Post Likes: 55,934
- Facebook Post Shares: 9,375

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.

