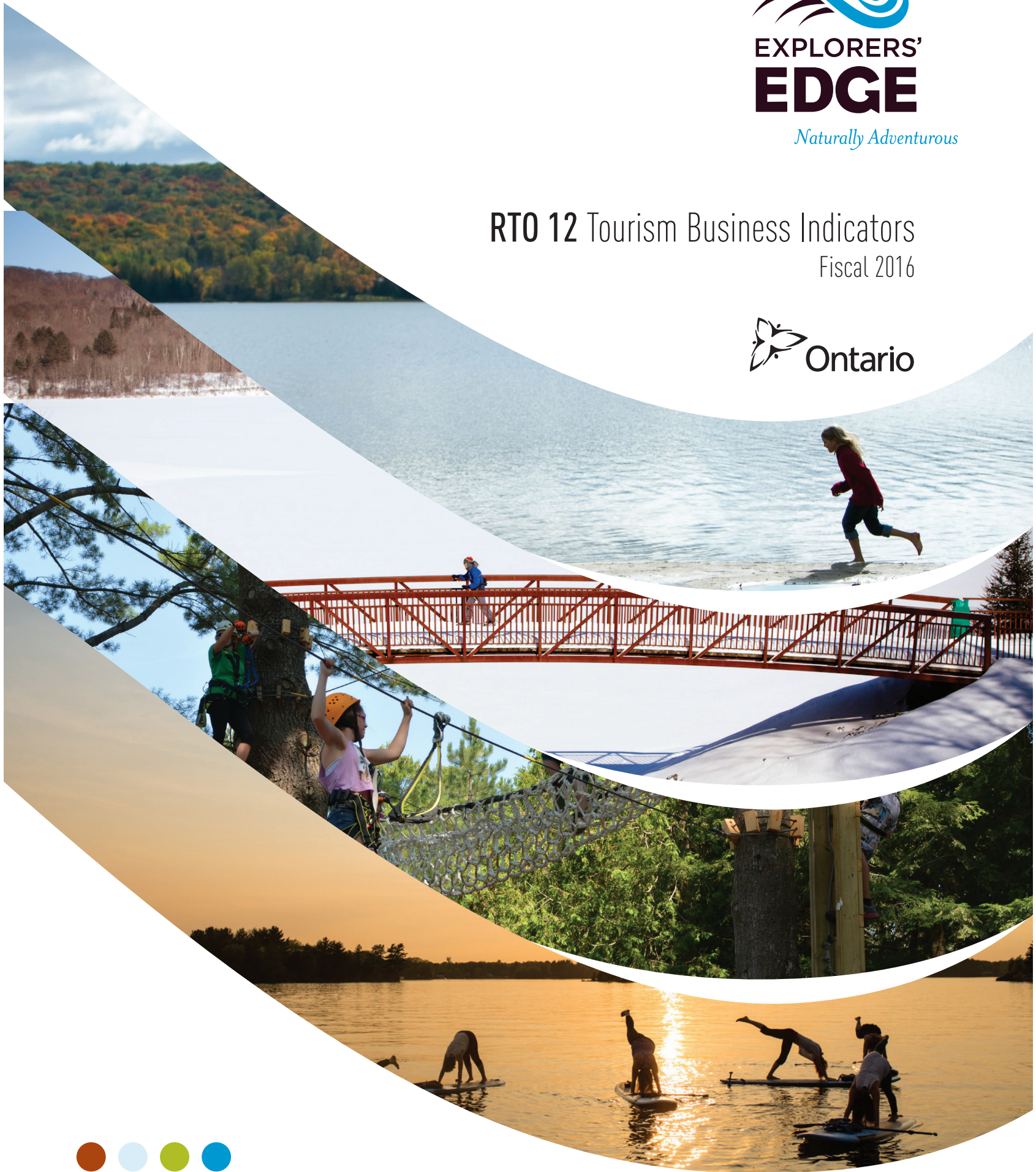




Naturally Adventurous

RTO 12 Tourism Business Indicators

Fiscal 2016



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F2016

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

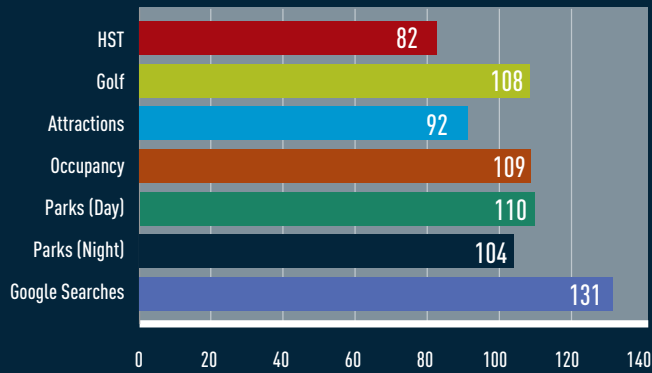
Index numbers are a statistician’s way of expressing the difference between two measurements by designating one number as the “base”, giving it the value 100 and then expressing the second number as a percentage of the first.

Example: In this report, we are using 2015 as the index base. If the total HST collected in our sample was \$110 in 2016, and \$100 in 2015, the HST Index for the region in 2016 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 2016



HST F2016 off 18% with decreases logged in all 4 quarters. Only 14 operators reporting.

HST Index



Occupancy, revenue per room, and average daily rate were all up in 4 of 4 quarters in F2016.

Occupancy Index



Searches on key regional terms up 31% over last year.

Google Searches



The resurgence of golf in the region continued, with rounds played up 8% over 2015.

Golf Index



Weak performance for reporting attractions operators, with gate entrances down 8% this year.

Attractions Index



Pleasant weather drove a banner year for provincial parks, with day use up 10% and overnight use up 4%.

Parks Index



The overall warming trend for summer continued with temperatures were higher than in the previous three years. A warm fall also likely contributed to excellent results for parks and golf operators alike.

Weather Index

Overview

Overall, an Outstanding Year for Tourism in RTO 12

In two respects, F2016 was a repeat of F2015. Despite rebounding from its 5-year low, a weak Loonie in 2016 helped drive strong international and intra and interprovincial tourism. And a warm summer and fall contributed to excellent results for accommodation, golf and park operators.

As was the case last year, the weak dollar overnight closest to the US border, which saw a considerable increase in American visitors. Canada logged a 9% increase in international travellers, while Toronto also recorded strong growth. RTO 12 benefitted from the dollar primarily because it kept Canadians from travelling to the US.

With so many of RTO 12's key tourism activities focused on outdoor activities, weather has a significant impact on tourism businesses in the region. The summer of 2016 was the warmest in four years, which encouraged visitation. Similarly, a traditionally cold Canadian winter – at least at the beginning of the season – helped drive strong results in Q4.

- Unlike 2015, occupancy was only up slightly during the summer, but the sector rallied during the fall and winter. Accommodation operators saw increases in occupancy during all four quarters of 2015, finishing the year up an outstanding 8.5%, versus 3.5% for Ontario overall.
- Similarly, regional provincial parks had a strong year, welcoming 4% more day use visitors and 10% more overnight visitors.
- Some of our data points show contrary results. HST receipts from reporting operators showed a decrease of 8%. Reporting attraction operators showed a decrease in gate receipts of 8% in 2016.
- Golf operators, however, recorded another strong annual increase in rounds played – up 8%.

Despite an encouraging start to the winter with cold temperatures early in the season, the weather turned warm in mid-February and stayed warm into March. Toronto, where many of the region's visitors live, recorded the warmest February in 80 years and the warmest February day ever, with the mercury topping 18 degrees on February 23, 2017. The unseasonably warm weather means the winter pursuits we promote had fallen off the agenda for many in our target audience. Notwithstanding these temperatures, accommodation data for the winter quarter shows a strong increase in occupancy.

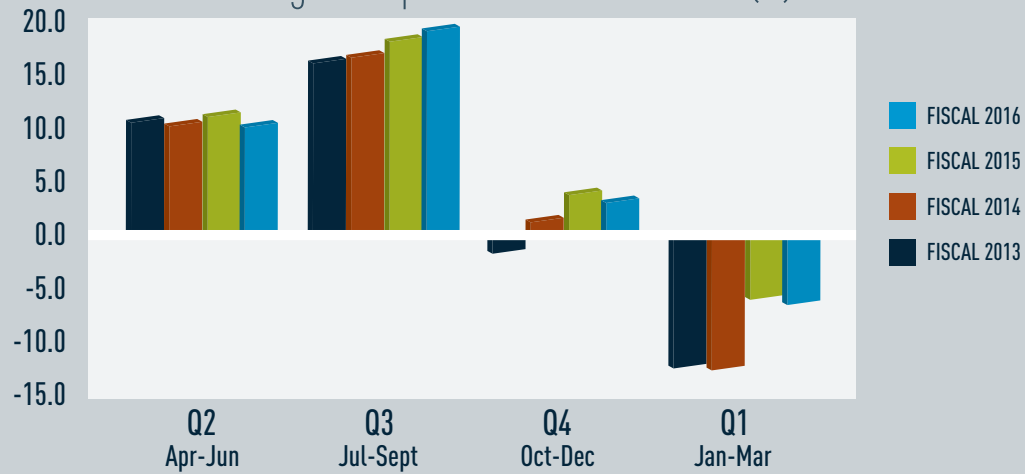


Weather Indexes

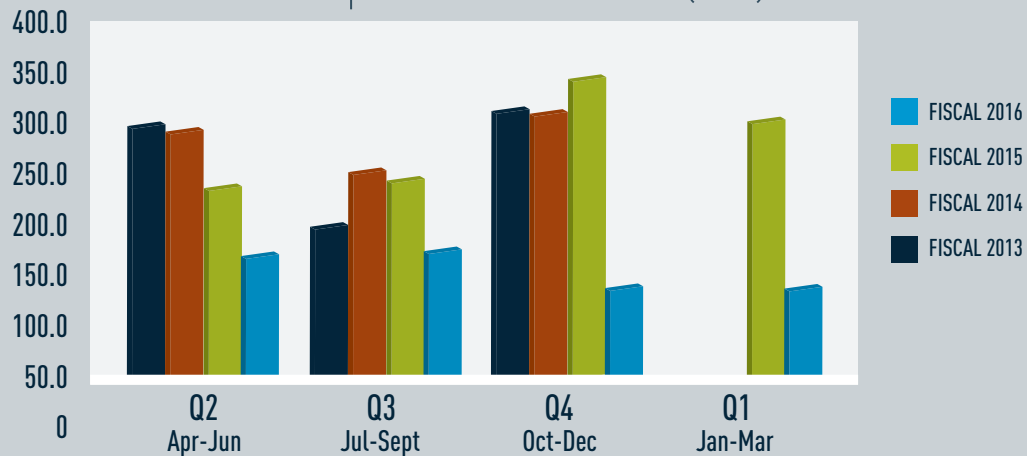
Weather Index

Summer and Winter Warming Trend Continued in 2016.

Average Temperature F2013-F2016 (C)



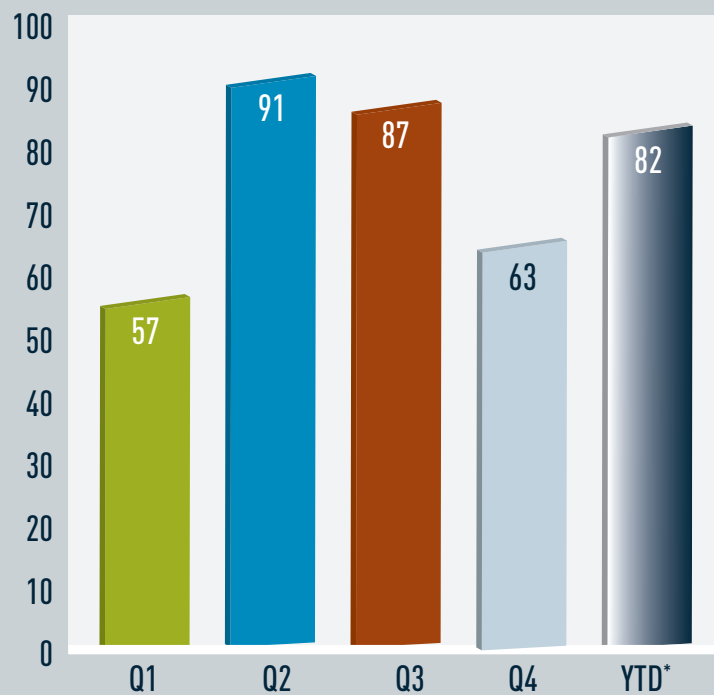
Total Precipitation F2013-F2016 (MM)



Business Indexes

HST RECEIPTS INDEX – F2016/F2015

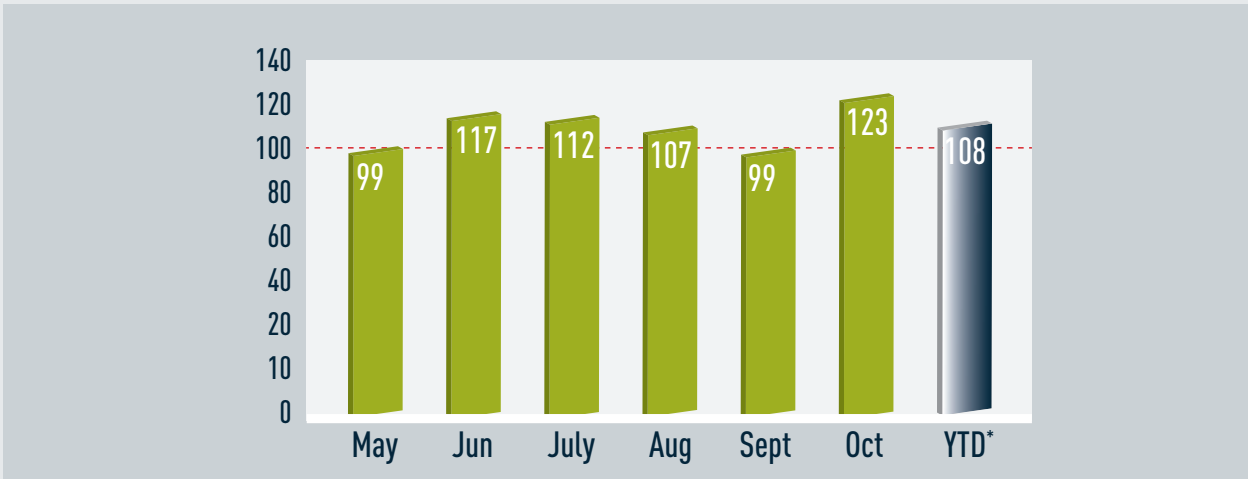
HST F2015 off 18% with decreases logged in all 4 quarters. Only 14 operators reporting.





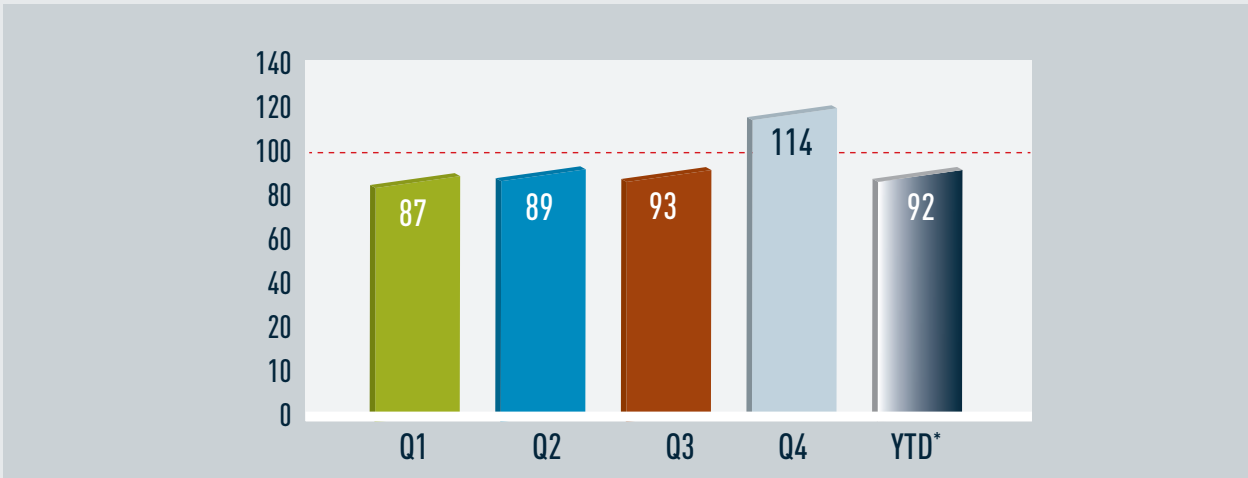
Golf Index F2016/F2015

The resurgence of golf in the region continued, with rounds played up 8% over 2015.



Attractions Index F2016/F2015

Weak performance for reporting attractions operators, with gate entrances down 8% this year.

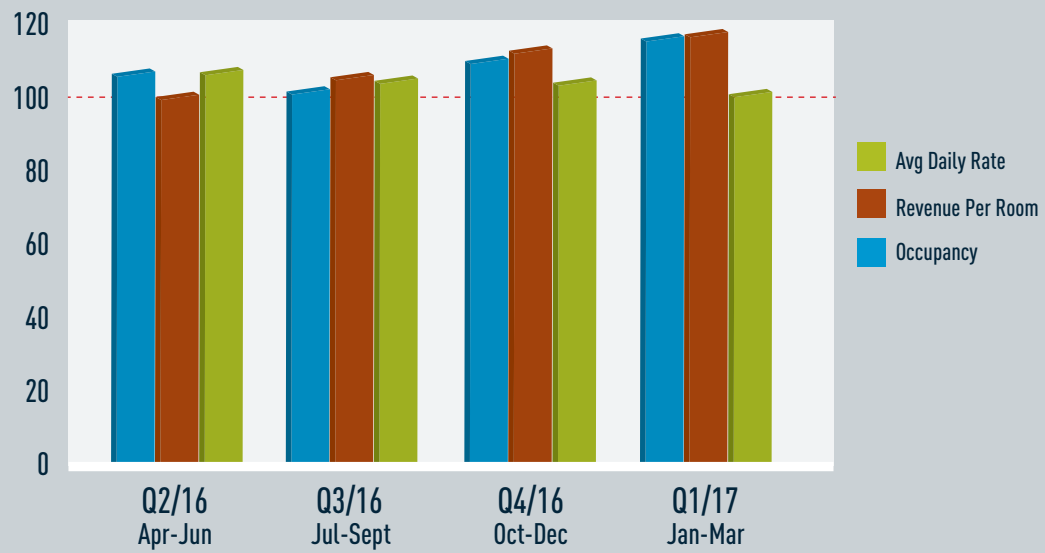




F2016

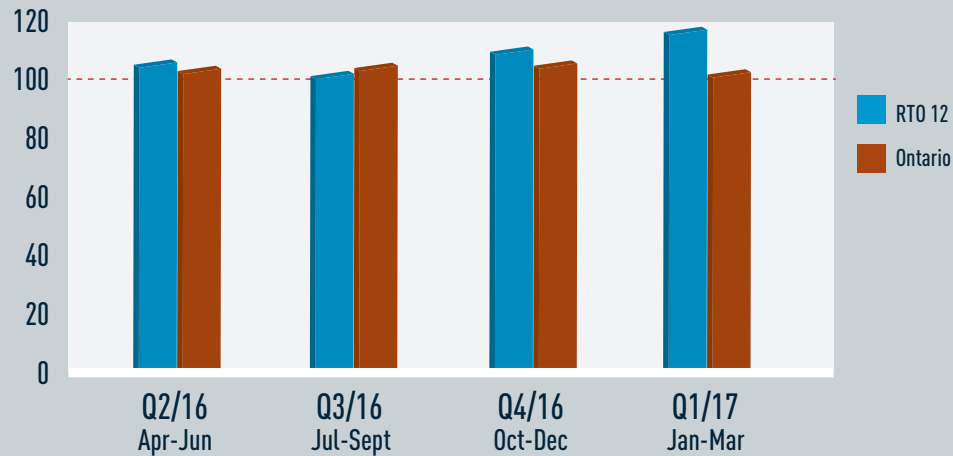
Room Occupancy and Room Revenue Indexes 2016/2015

Occupancy, revenue per room, and average daily rate were all up in 4 of 4 quarters in F2016.



Room Occupancy Index – RTO 12 versus Ontario – 2016/17

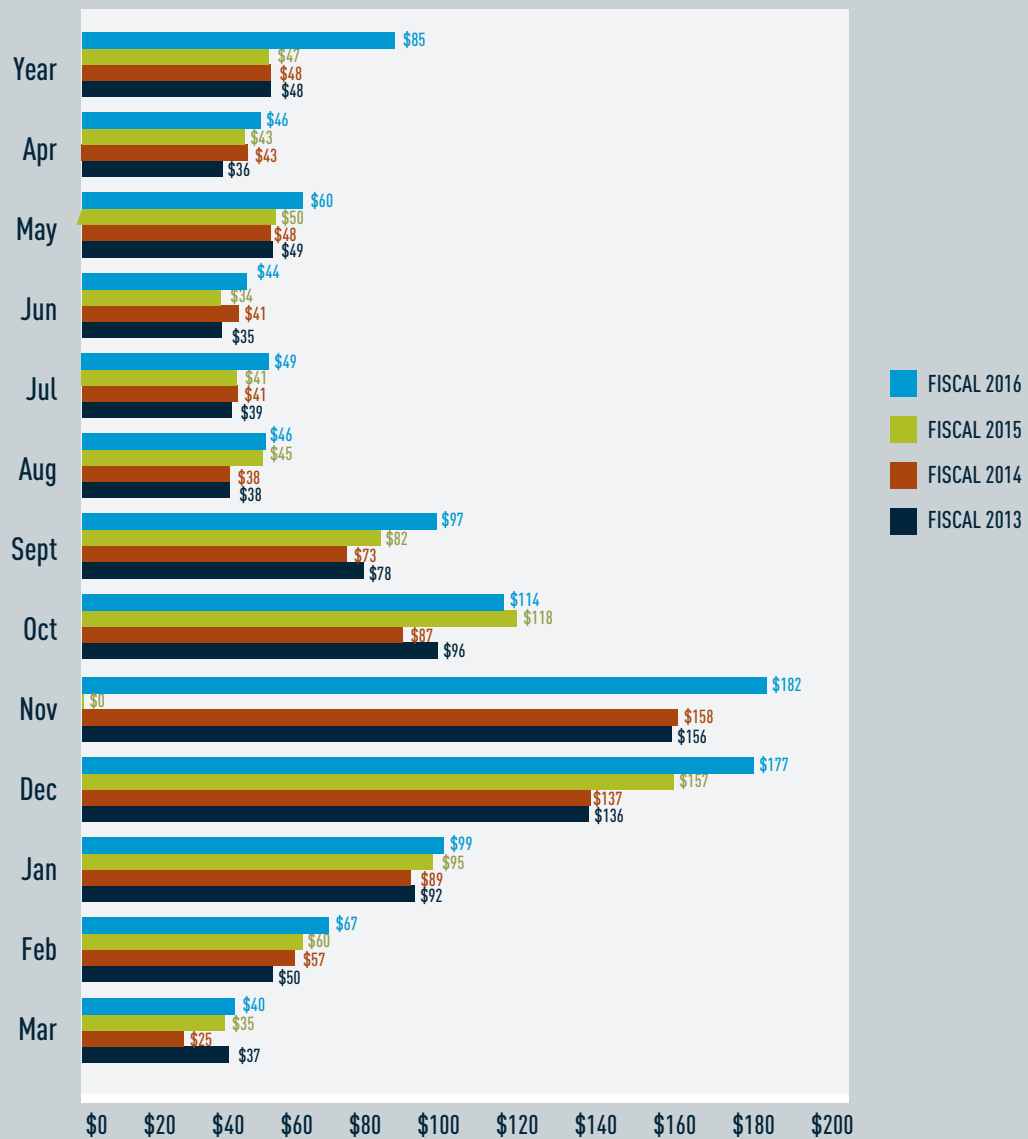
RTO 12 outperformed Ontario in all but one quarter. Overall for the year, RTO 12 was up 8.5% versus 3.5% for Ontario.





F2016

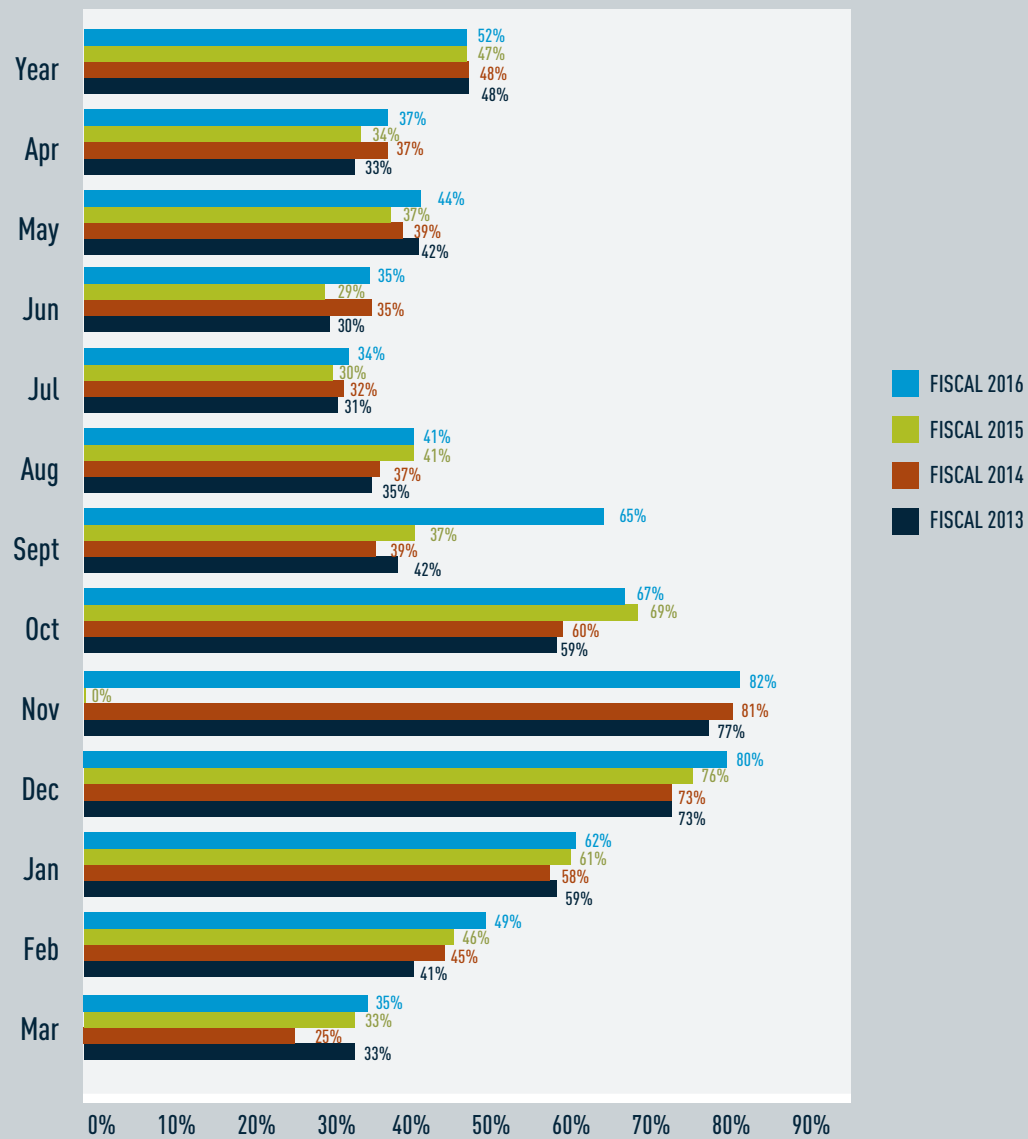
RTO 12 Revenue Per Available Room F2013-F2016





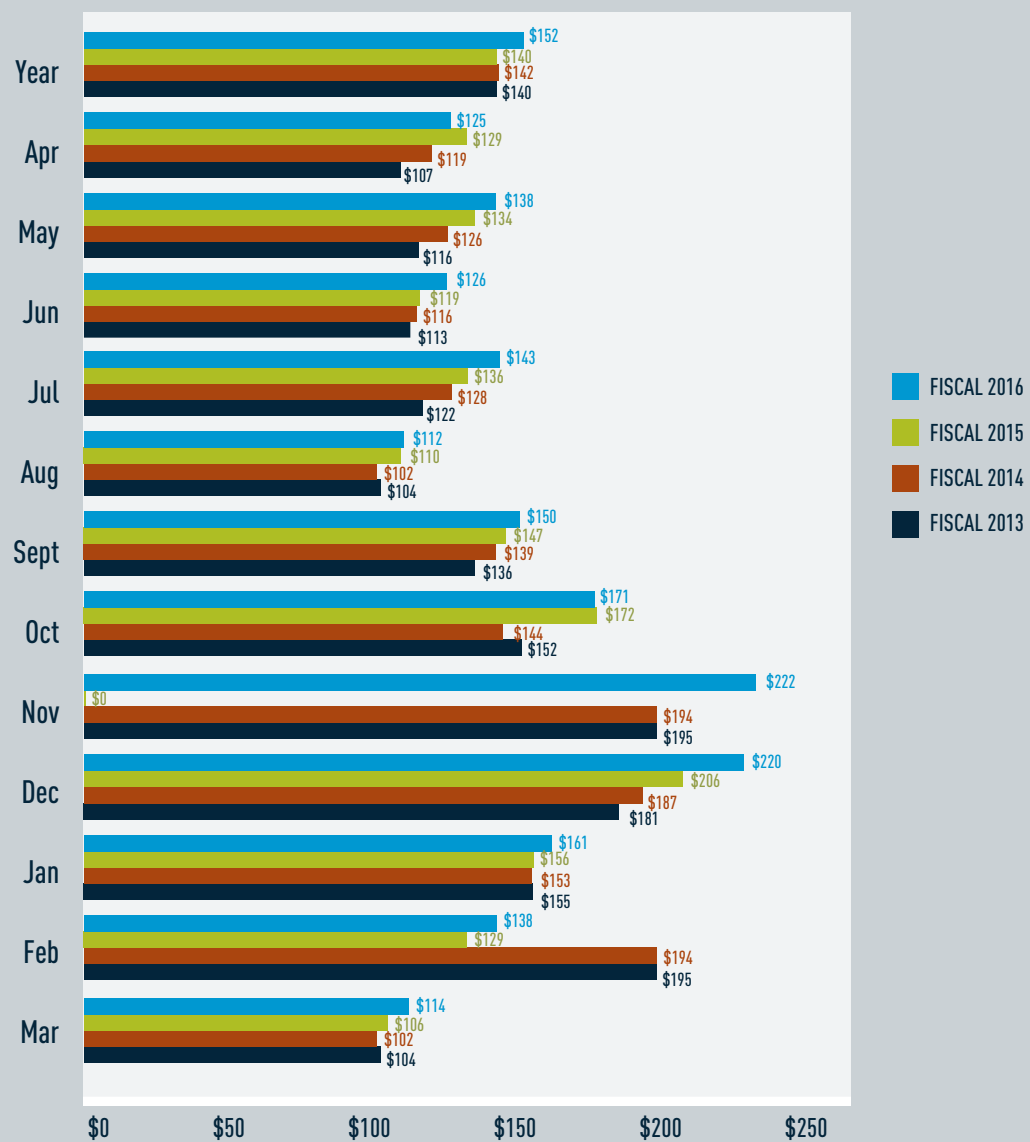
F2016

RTO 12 Room Occupancy Rate F2013-F2016





RTO 12 Average Daily Rate F2013-F2016



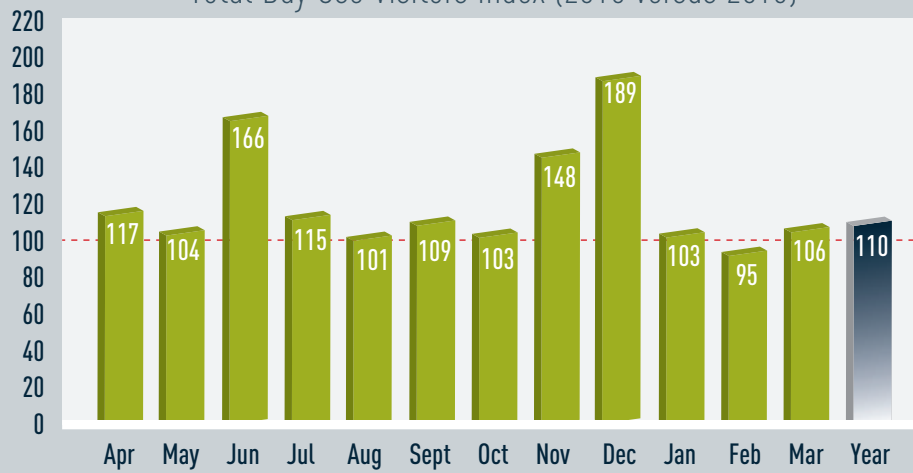


Parks Indexes

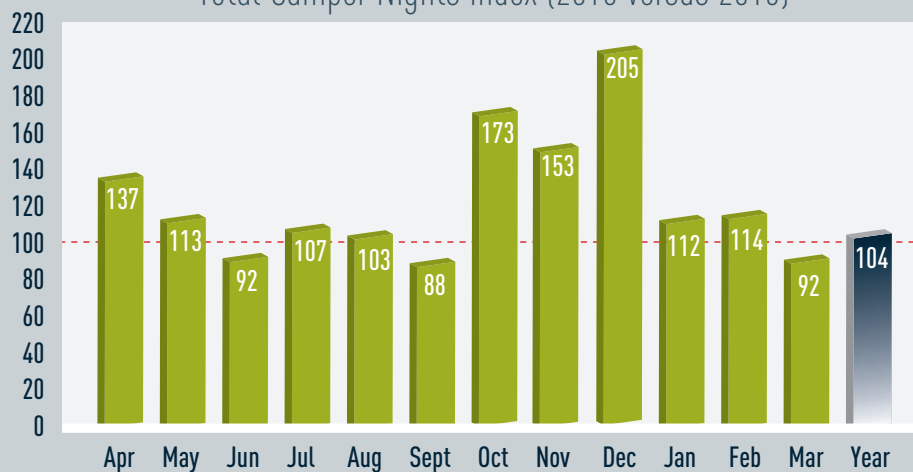
RTO 12 Parks Index

All Parks had a good year, lead by Arrowhead and Mikisew which experienced strong increases in both day and overnight visitors.

Total Day Use Visitors Index (2016 versus 2015)



Total Camper Nights Index (2016 versus 2015)



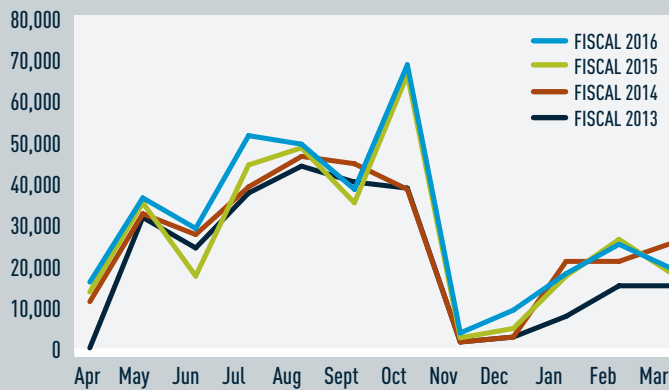


F2016

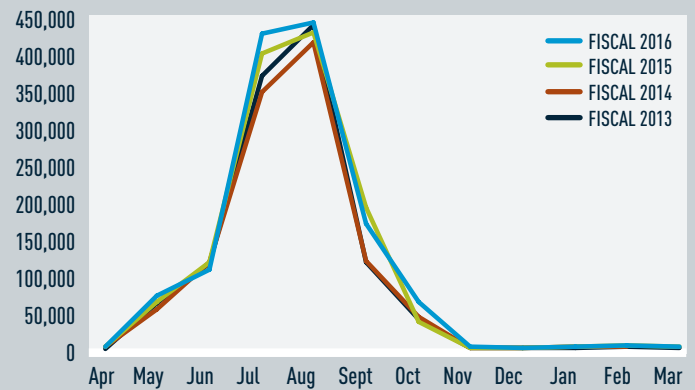
RTO 12 Parks Index

A strong fall drove large increase for the region's provincial parks.

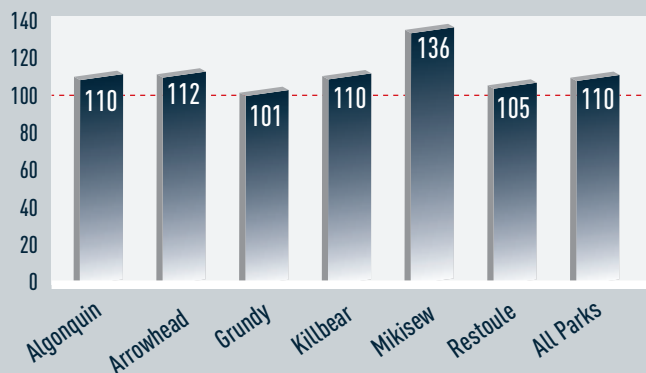
Total Day Use Visitors



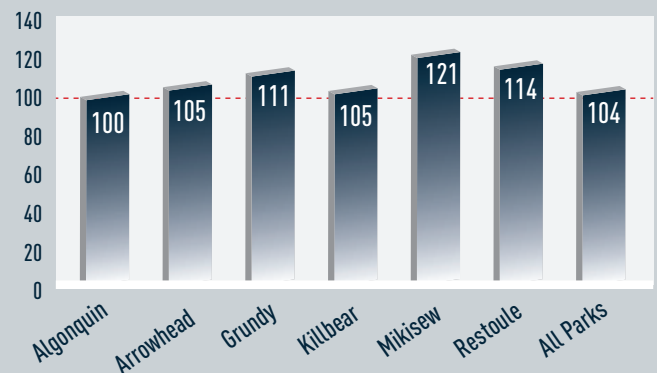
Total Camper Nights



Total Day Use Visitors Index (By Park, F2015 versus F2016)



Total Camper Nights Index (By Park, F2015 versus F2016)



Google Searches

Google Searches F2016 versus F2015

Searches on key regional terms up 31% over last year

KEYWORD	GOOGLE SEARCHES		CHANGE
	F2016	F2015	
Algonquin Park	40,500	33,100	22%
Muskoka	27,100	18,100	50%
Parry Sound	9,900	8,100	22%
Almaguin Highlands	590	320	84%
Loring-Restoule	480	390	23%
Total Explorers' Edge	78,570	60,010	31%

Visitor Exit Survey

Key Results 2016

Festival & Events (based on five events and 260 responses)

- 55% of respondents cited Facebook when asked how they heard about the festival / event
- 22% of respondents cited a festival / event prompted their first visit to the region
- 33% of respondents stayed in overnight roofed commercial accommodations as a result of festival / event
- Atmosphere, family fun and free activities were cited as event highlights
- Signage and communication was cited as the number one area of improvement across all events
- 98% said they would return to the region at a later date
- 86% were satisfied or highly satisfied with the event

Fall 2016 Fuel and Fun (based on 236 responses)

- Post visit 82% of respondents were satisfied or highly satisfied with their getaway to the region
- 74% of respondents rated the experience a 5 out of 5
- Things to do, Natural Landscapes and Pricing rated highest in overall satisfaction of the travellers stay 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 or 705.646.7673 for more details.

