

# TRENDS

IN THE CANADIAN HOTEL INDUSTRY

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### REPORT OF ROOMS OPERATIONS FOR RTO 13 - NORTHERN ONTARIO TOURISM REGIONS MONTH OF SEPTEMBER 2018

| Location                   | Occupancy Percentage |              |                | Average Daily Rate |                 |              | Revenue Per Available Room |                 |              |
|----------------------------|----------------------|--------------|----------------|--------------------|-----------------|--------------|----------------------------|-----------------|--------------|
|                            | 2018                 | 2017         | **Point Change | 2018               | 2017            | Variance     | 2018                       | 2017            | Variance     |
| NORTH BAY, ONTARIO         | 69.6%                | 70.4%        | -0.8           | \$112.48           | \$107.89        | 4.3%         | \$78.32                    | \$75.94         | 3.1%         |
| SUDBURY, ONTARIO           | 76.4%                | 78.2%        | -1.8           | \$126.59           | \$116.20        | 8.9%         | \$96.75                    | \$90.81         | 6.5%         |
| TIMMINS, ONTARIO           | 60.1%                | 62.5%        | -2.4           | \$128.53           | \$115.29        | 11.5%        | \$77.22                    | \$72.04         | 7.2%         |
| OTHER NORTHEASTERN ONTARIO | 60.0%                | 61.2%        | -1.2           | \$126.16           | \$113.49        | 11.2%        | \$75.69                    | \$69.45         | 9.0%         |
| <b>TOTAL RTO 13A</b>       | <b>68.9%</b>         | <b>70.4%</b> | <b>-1.5</b>    | <b>\$123.29</b>    | <b>\$113.62</b> | <b>8.5%</b>  | <b>\$84.99</b>             | <b>\$80.03</b>  | <b>6.2%</b>  |
| SAULT STE. MARIE, ONTARIO  | 79.2%                | 80.2%        | -1.0           | \$122.52           | \$124.18        | -1.3%        | \$97.04                    | \$99.59         | -2.6%        |
| <b>TOTAL RTO 13B</b>       | <b>79.1%</b>         | <b>80.1%</b> | <b>-1.0</b>    | <b>\$123.20</b>    | <b>\$124.42</b> | <b>-1.0%</b> | <b>\$97.45</b>             | <b>\$99.68</b>  | <b>-2.2%</b> |
| THUNDER BAY, ONTARIO       | 83.2%                | 88.4%        | -5.2           | \$124.42           | \$123.95        | 0.4%         | \$103.47                   | \$109.60        | -5.6%        |
| KENORA, ONTARIO            | 87.4%                | 81.7%        | 5.7            | \$136.04           | \$127.93        | 6.3%         | \$118.92                   | \$104.50        | 13.8%        |
| OTHER NORTHWESTERN ONTARIO | 73.9%                | 72.7%        | 1.2            | \$122.29           | \$117.49        | 4.1%         | \$90.40                    | \$85.43         | 5.8%         |
| <b>TOTAL RTO 13C</b>       | <b>81.5%</b>         | <b>83.8%</b> | <b>-2.3</b>    | <b>\$125.55</b>    | <b>\$123.12</b> | <b>2.0%</b>  | <b>\$102.36</b>            | <b>\$103.22</b> | <b>-0.8%</b> |
| <b>TOTAL RTO 13</b>        | <b>74.2%</b>         | <b>75.8%</b> | <b>-1.6</b>    | <b>\$123.96</b>    | <b>\$118.47</b> | <b>4.6%</b>  | <b>\$92.00</b>             | <b>\$89.77</b>  | <b>2.5%</b>  |
| <b>ONTARIO</b>             | <b>81.6%</b>         | <b>81.7%</b> | <b>-0.1</b>    | <b>\$181.15</b>    | <b>\$169.51</b> | <b>6.9%</b>  | <b>\$147.78</b>            | <b>\$138.46</b> | <b>6.7%</b>  |

\*\* Please note that the variance between current and previous year occupancy is reported as a point change and not as a percentage variance.

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## REPORT OF ROOMS OPERATIONS FOR RTO 13 - NORTHERN ONTARIO TOURISM REGIONS NINE MONTHS ENDED SEPTEMBER 2018

| Location                   | Occupancy Percentage |              |                | Average Daily Rate |                 |             | Revenue Per Available Room |                 |             |
|----------------------------|----------------------|--------------|----------------|--------------------|-----------------|-------------|----------------------------|-----------------|-------------|
|                            | 2018                 | 2017         | **Point Change | 2018               | 2017            | Variance    | 2018                       | 2017            | Variance    |
| NORTH BAY, ONTARIO         | 51.7%                | 57.9%        | -6.2           | \$107.62           | \$103.74        | 3.7%        | \$55.60                    | \$60.03         | -7.4%       |
| SUDBURY, ONTARIO           | 67.0%                | 58.3%        | 8.7            | \$118.66           | \$114.16        | 3.9%        | \$79.48                    | \$66.56         | 19.4%       |
| TIMMINS, ONTARIO           | 60.0%                | 58.8%        | 1.2            | \$126.74           | \$118.71        | 6.8%        | \$76.05                    | \$69.76         | 9.0%        |
| OTHER NORTHEASTERN ONTARIO | 59.0%                | 56.1%        | 2.9            | \$122.88           | \$116.98        | 5.0%        | \$72.50                    | \$65.62         | 10.5%       |
| <b>TOTAL RTO 13A</b>       | <b>60.3%</b>         | <b>57.9%</b> | <b>2.4</b>     | <b>\$118.03</b>    | <b>\$112.81</b> | <b>4.6%</b> | <b>\$71.18</b>             | <b>\$65.28</b>  | <b>9.0%</b> |
| SAULT STE. MARIE, ONTARIO  | 59.3%                | 58.6%        | 0.7            | \$111.92           | \$110.79        | 1.0%        | \$66.39                    | \$64.90         | 2.3%        |
| <b>TOTAL RTO 13B</b>       | <b>59.6%</b>         | <b>58.9%</b> | <b>0.7</b>     | <b>\$113.38</b>    | <b>\$111.89</b> | <b>1.3%</b> | <b>\$67.60</b>             | <b>\$65.90</b>  | <b>2.6%</b> |
| THUNDER BAY, ONTARIO       | 75.2%                | 75.1%        | 0.1            | \$122.60           | \$116.96        | 4.8%        | \$92.19                    | \$87.85         | 4.9%        |
| KENORA, ONTARIO            | 74.8%                | 71.8%        | 3.0            | \$129.95           | \$123.26        | 5.4%        | \$97.26                    | \$88.46         | 9.9%        |
| OTHER NORTHWESTERN ONTARIO | 68.9%                | 64.1%        | 4.8            | \$125.60           | \$120.53        | 4.2%        | \$86.56                    | \$77.27         | 12.0%       |
| <b>TOTAL RTO 13C</b>       | <b>73.7%</b>         | <b>72.2%</b> | <b>1.5</b>     | <b>\$124.25</b>    | <b>\$118.53</b> | <b>4.8%</b> | <b>\$91.61</b>             | <b>\$85.55</b>  | <b>7.1%</b> |
| <b>TOTAL RTO 13</b>        | <b>63.8%</b>         | <b>61.9%</b> | <b>1.9</b>     | <b>\$119.28</b>    | <b>\$114.47</b> | <b>4.2%</b> | <b>\$76.15</b>             | <b>\$70.86</b>  | <b>7.5%</b> |
| <b>ONTARIO</b>             | <b>71.4%</b>         | <b>70.3%</b> | <b>1.1</b>     | <b>\$163.36</b>    | <b>\$155.58</b> | <b>5.0%</b> | <b>\$116.72</b>            | <b>\$109.36</b> | <b>6.7%</b> |

\*\* Please note that the variance between current and previous year occupancy is reported as a point change and not as a percentage variance.

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