

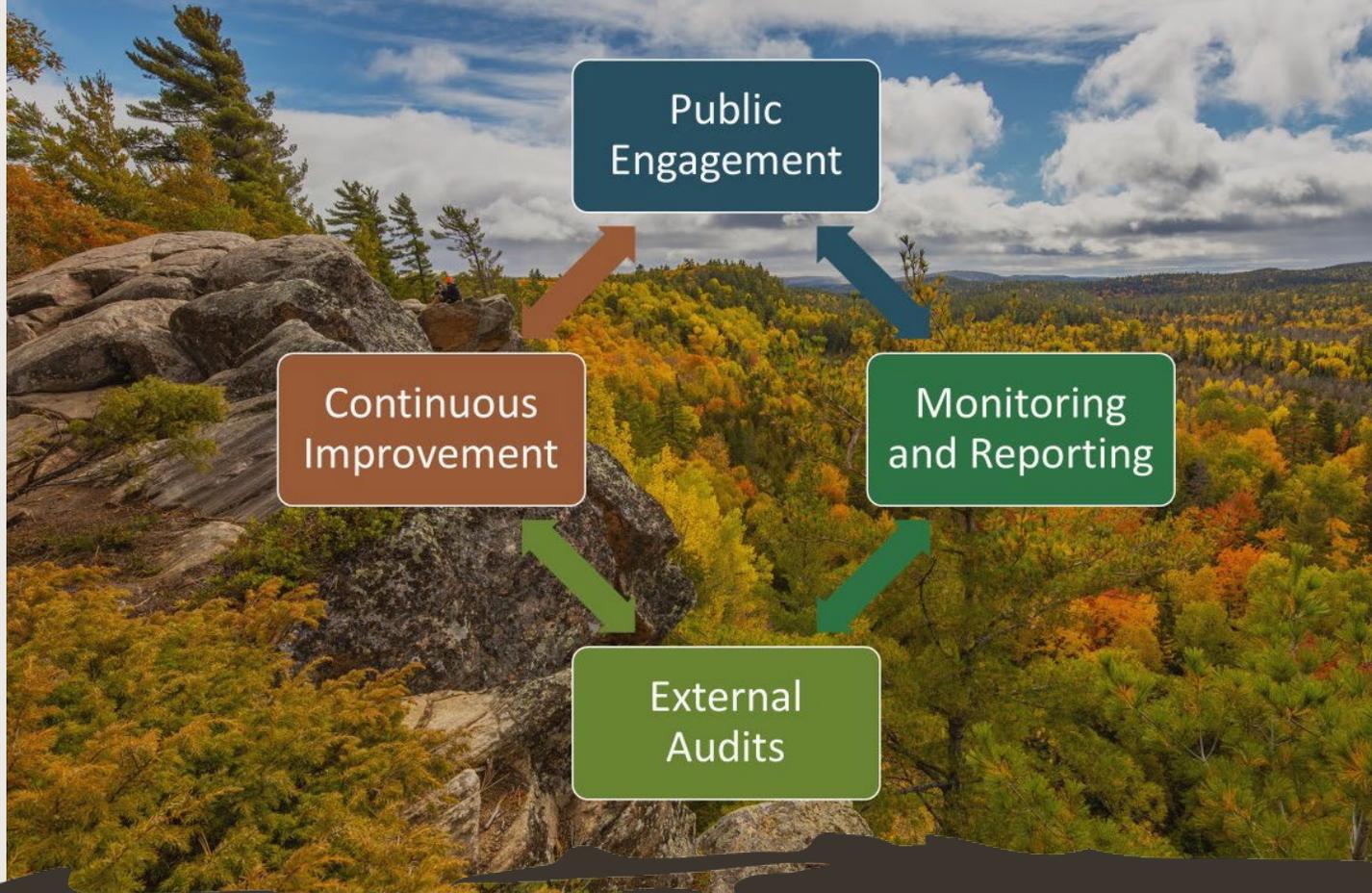
Unlocking Tourism Trends: Navigating the Path to Success

1st Edition
January 2024

Ontario 

 **ONTARIO'S
HIGHLANDS
TOURISM
ORGANIZATION**

Staying true to our commitment



OHTO's Approach to Research

1) Primary Research

- County DMO Partnership with RTO6 - Visitor Research Program data
- OHTO stakeholder surveys

2) Secondary Research

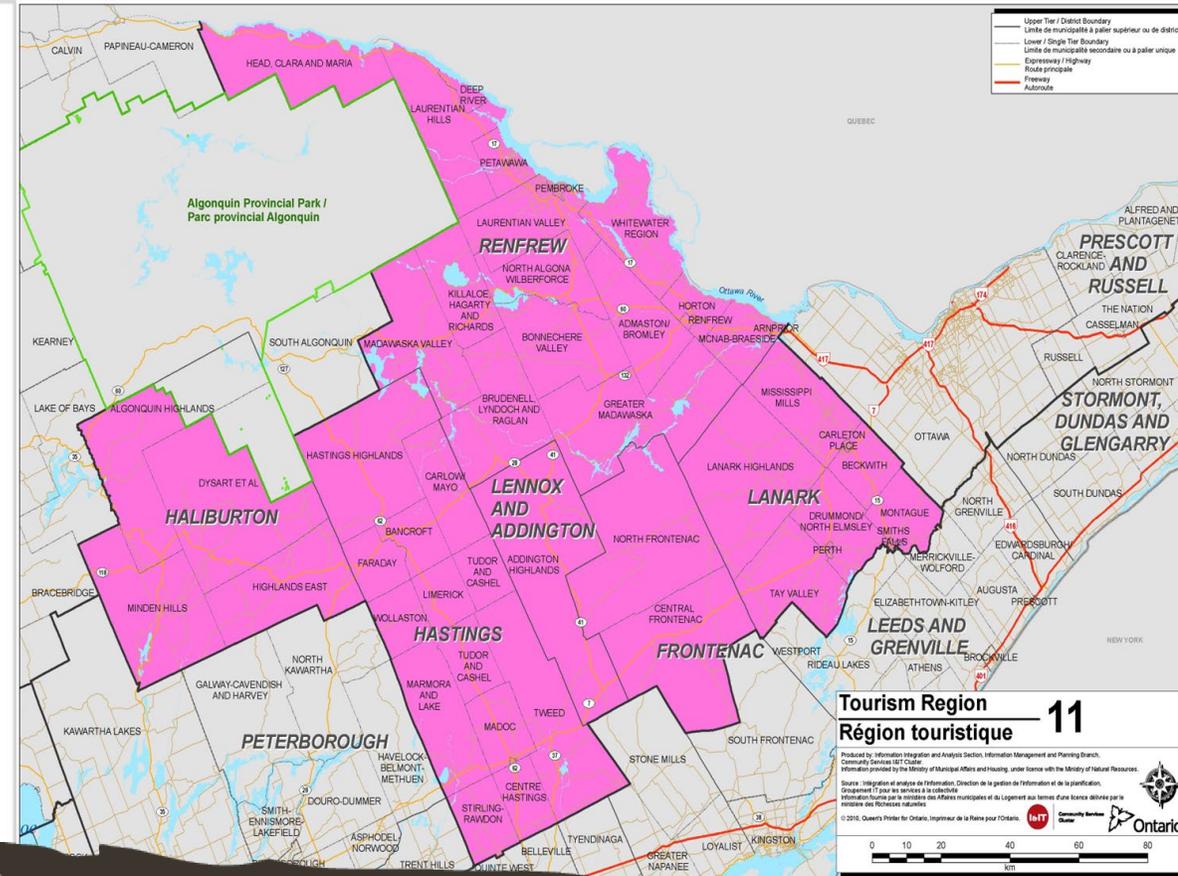
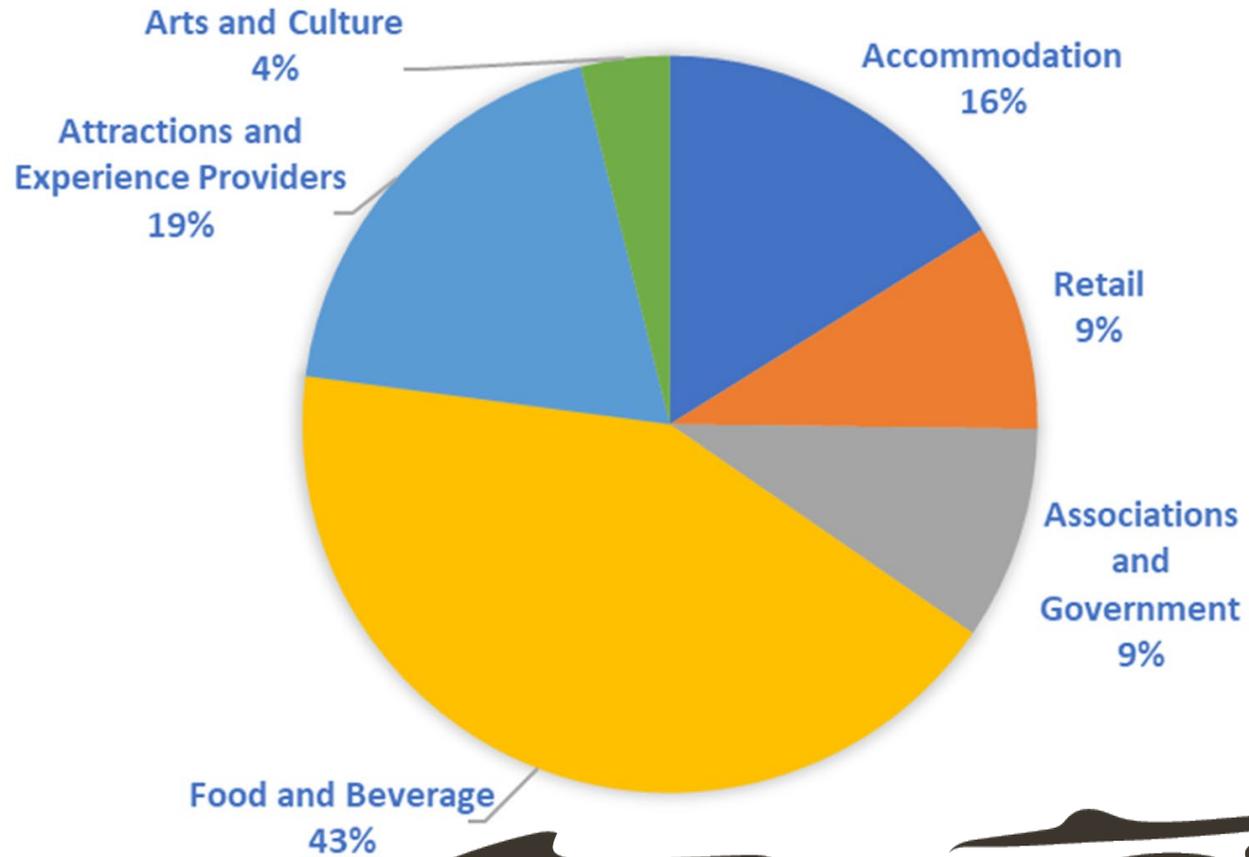
- Tourism sector reports (i.e. OTEC, CBRE)
- Ministry of Tourism, Culture & Sports
- Destination Ontario and Destination Canada

3) Results from our programming

A group of snowmobilers is riding down a snowy hillside. The terrain is covered in snow with sparse, dry vegetation. The snowmobilers are wearing winter gear and helmets. The scene is captured from a high angle, showing the path they are taking down the slope.

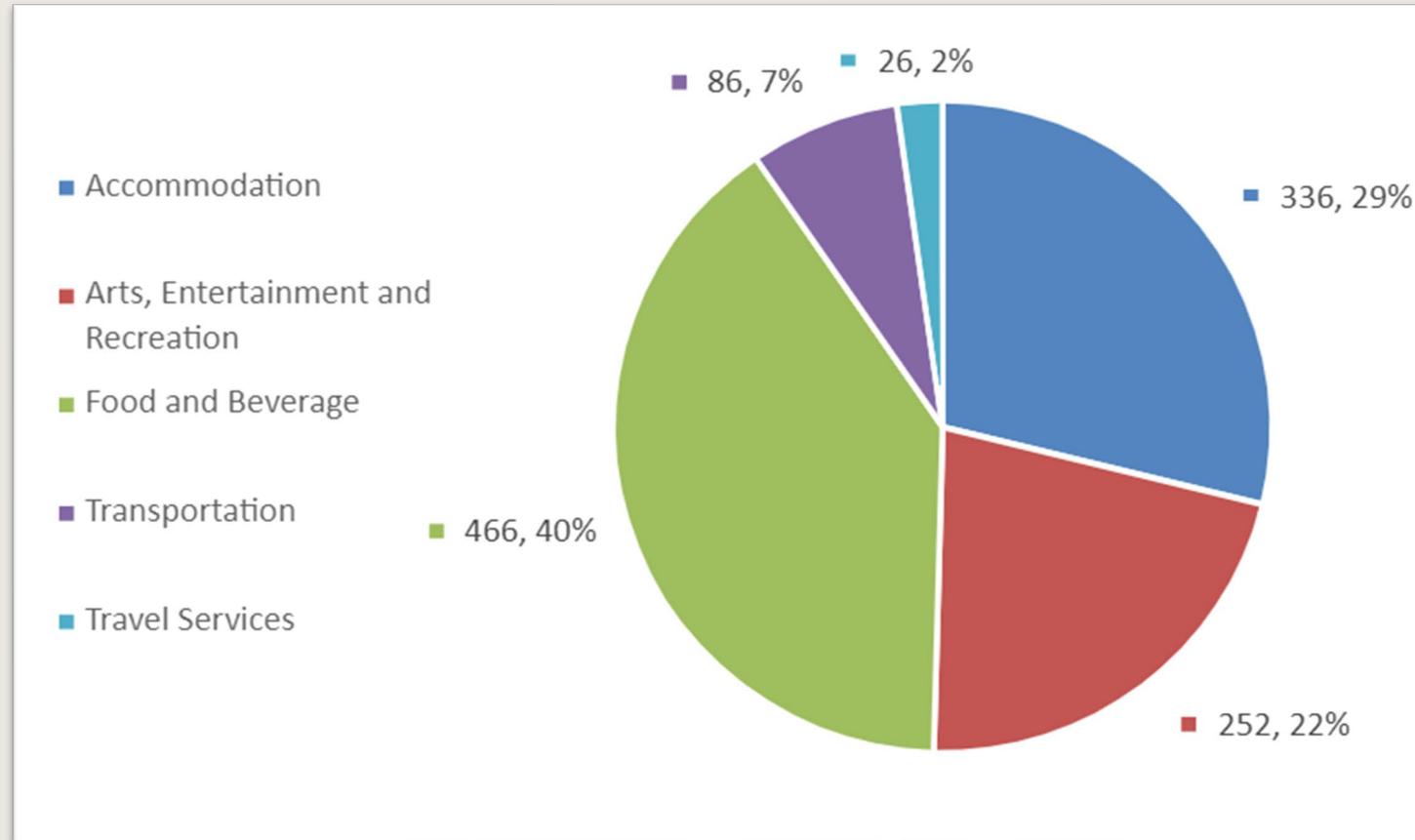
Ontario's Highlands Snapshot

Who We Are: 856 Members and Growing!



Source: OHTO Membership Database, as of Dec. 31, 2023

Who We Are: 1,166 Establishments in the Region



How We Are Performing: Industry Data

Lennox & Addington **DARK SKY VIEWING AREA**

Why here?
This Dark Sky Viewing Area is the first you will discover north of the 43rd. Ontario's west 11 "Main Street".
A location here in Lennox & Addington County provides a great opportunity to see all of the stars that are visible for viewing.

Light Pollution in Southern Ontario
The white areas in this satellite satellite image indicate significant light pollution. Black regions all have no light at all.
This Dark Sky Viewing Area is the most southerly dark site in the province.

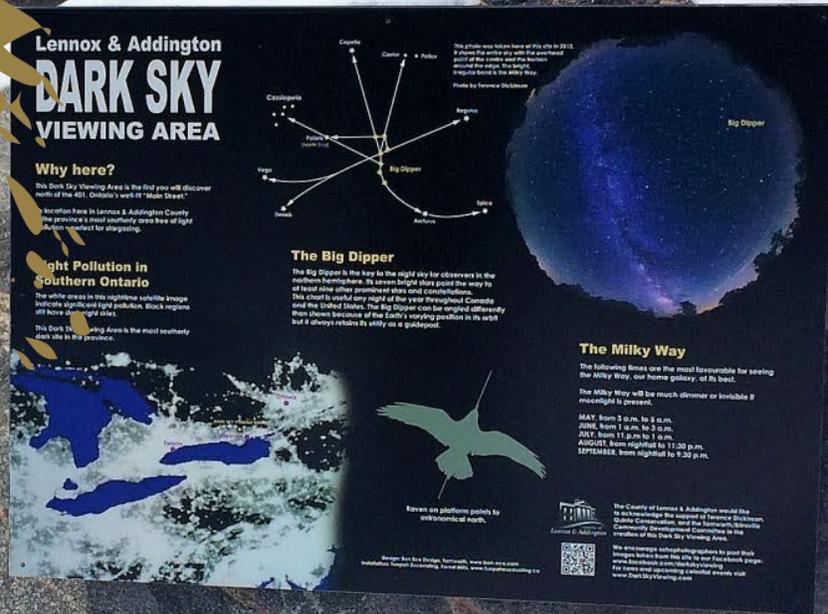
The Big Dipper
The Big Dipper is the key to the night sky for observers in the northern hemisphere. Its seven bright stars show the way to at least nine other prominent stars and constellations. This constellation is visible every night of the year throughout Canada and the United States. The Big Dipper can be angled differently from place to place as the Earth's varying position in its orbit but it always retains its shape as a guideline.

The Milky Way
The following times are the most favourable for seeing the Milky Way, our home galaxy, at its best.
The Milky Way will be much dimmer or invisible if moonlight is present.

MAY	from 3 a.m. to 8 a.m.
JUNE	from 1 a.m. to 5 a.m.
JULY	from 11 p.m. to 3 a.m.
AUGUST	from midnight to 11:30 p.m.
SEPTEMBER	from midnight to 9:30 p.m.

Dark Sky Viewing Area
The County of Lennox & Addington would like to acknowledge the support of Lennox & Addington County Council, the County of Lennox & Addington, the Municipality of Lennoxville, the Municipality of Lennoxville, and the Municipality of Lennoxville.

Dark Sky Viewing Area
We are pleased to have this area designated as a Dark Sky Viewing Area. We encourage you to visit the area and enjoy the view. For more information on Dark Sky Viewing Areas, visit www.darksky.org.



Our Operators Are Feeling Optimistic

- **55% feel their revenue is better or about the same compared to 2019**
- **37% estimate visitation is slightly better than in 2019**
- **72% expect their 2024 tourism season to be better or about the same**

Barriers to Business Success:

- 1) Labour shortage
- 2) Lack of visitation/revenue

Priority for Business Investment:

- 1) Marketing and promotions
- 2) Recruiting and hiring qualified staff
- 3) Capital improvements

Our Region is Performing Well:

On the path to surpass pre-pandemic levels

	2022	2019
Hotel Occupancy Rate	52%	57.8%
Short-Term Rental Occupancy Rate	49.2%	48.7%
Hotel Average Daily Rate	\$143.00	\$132.15
Short-Term Rental Daily Rate	\$259.54	\$173.58

Ontario Tourism is on an upward recovery

- Last year some KPIs surpassed 2022 levels, but are still below 2019
- Border crossings from the US market are still low – however, experienced growth in other markets (China, Mexico and Hong Kong)
- \$66 billion generated in tourism revenue in 2022 vs. \$74 billion in 2019.
 - Forecasted to grow tourism revenues to \$98 billion by 2027.
- 622,000 were employed in 2022 vs. 721,000 in 2019
 - Forecasted to have 297,900+ job openings by 2027

Current state of Canadian Tourism

- Highly competitive global tourism market
- Geopolitical strife and economic uncertainties
- Impact of inflation to continue into 2024 and ease by 2025
- Steadfast travel enthusiasm – consumers prioritize leisure travel
- Robust recovery boosts tourism spending

Inflation isn't a concern for travelers

- **93% of Canadian travelers plan to travel in the next two years.**
 - 53% want to explore their own province
 - 48% will do day trips close to home
- **96% of US travelers plan to travel in the next two years:**
 - **62% plan to visit Canada**
- **71% of Canadian travelers said inflation impacted their travel plans:**
 - 56% will take fewer trips
 - 47% will be seeking better deals
 - 32% will plan trips closer to home
- **Main reasons for travel: (1) relaxation, (2) change of scenery, (3) seeking new experiences, and (4) explore interesting attractions.**

A photograph of an ice climber in a black jacket and orange pants, wearing a white helmet and using ice axes to ascend a frozen waterfall. The scene is set against a backdrop of dark, jagged rock formations heavily encrusted with white snow and icicles. A large, dark brown brushstroke graphic is overlaid on the left side of the image, containing the text.

How We Are Performing: Visitor Data

Who is visiting our region?

- Top source markets:
 - Ottawa
 - Toronto
 - Kingston
 - Hamilton/Mississauga/Oshawa (tie)
 - Peterborough
- Source markets remained consistent from 2019 to 2022

- Top 5 Prizm Segments of 2022 & 2019



What we also know about visitors:

- **3.87 million visitors**
 - Average age = 49 years old
- **\$622 million in total spending**
- **56% stayed overnight**
 - Typically for 2 or 3 nights
 - Preference is private homes/cottages
- **Majority visit in July – Sep (Q3 – 54% of visitors)**
- **Popular activities:**
 - Outdoor/sports activity (52%)
 - VFR (49%)
 - Sightseeing (15%)
 - Shopping (15%)
 - Food & Beverage (12%)
- **Top Expenditures:**
 - Accommodation - \$252 million
 - Food & Beverage - \$174 million
 - Transportation - \$130 million



Target Audience

- 50/50 split between locals and outside source markets
- Ottawa, Toronto, Kingston, and Hamilton
- The Connected Explorer

Ongoing Success In Our Marketing Approach

- Our consumer newsletter has an open rate of 72%
- Locally Inspired has already resulted in 1,756,104 impressions on our social media platforms
- Destination Ontario Fall Spotlight Campaign (sept/oct) achieved 12,573,286 total impressions

Visitor – Marketing Trends

1. Artificial Intelligence (AI)
2. Short-Form Videos
3. Value-Based Marketing
4. Social Media Customer Service



Industry Trends

Labour Market Challenges + Opportunities

- Our region experienced a 21% rise in job opportunities from 2021 to 2022
- Ontario expected to have 11% growth in job demand by 2025 compared to 2019
- However, the industry voices challenges with recruitment and retention – time to transform the recruitment process.

Let's take a look at the Hourly Workforce which largely makes up the tourism labour market opportunities...

A Picture of the Hourly Workforce

Accounts for over 60% of the 18 million workers in Canada and is a significant part of the tourism industry.

1) Identify which workforce segment you are after:

- Career Discoveries
- The Career Hourly
- The New Canadian

2) Identify career priorities to help focus approach to not only recruit, but also retain ideal talent long-term

A Picture of the Hourly Workforce

3) Understand career structure and mobility by being flexible and adapting in your scheduling to enhance recruitment and retention

4) Engage your candidates where they are to be better with recruitment

- Job search triggers
- Time sensitivity
- Online platforms
- Frustration and ghosting

Resources available to help

Are you gearing up for new hires this year?

Begin 2024 with TIAO's Tourism Workforce Sustainability Program, **running until March 31st**. This initiative aims to enhance and diversify Ontario's tourism workforce while assisting employers in fostering long-term sustainability. We will support the recruitment and retention of 200 new talents across the province.



As a participant, you will be eligible for;

- **Living Wage Top-Up**, enabling you to meet living wage standards.
- **Complimentary training courses**, courtesy of OTEC, covering essential soft skills crucial for contemporary work environments.
- **Mentorship opportunities**, access to resources on topics such as recruitment, hiring, and Diversity, Equity, Accessibility, and Inclusion.
- **Region-specific tools** available in the comprehensive employer guide, and much more.

[Register Today](#)

Take advantage of this opportunity to continue the path towards a long-term and sustainable working environment.

Become A Certified Living Wage Employer

Hear from other owners about the benefits of certification.

Feb 6 2:00 p.m.
RSVP, space limited



The Ontario Living Wage Network is making 3 certified owner/managers available for discussion and questions on February 6th at 2PM. Hear about their experiences with their living wage certification over the years; both benefits and challenges, and learn about paying a living wage in the food service sector.

Organized by the Ontario Living Wage Network and the Hamilton Roundtable for Poverty Reduction.

[Register for the webinar](#)

A ONE-OF-A-KIND VIRTUAL HIRING EVENT FOR ONTARIO'S EMPLOYERS & STUDENTS

FLIP THE FAIR

February 16
10AM - 4PM



Connect with top talent at the Flip the Fair, hosted by the Tourism Industry Association of Ontario on February 16th, from 10AM to 4PM.

Flip the Fair is a unique virtual event where candidates set up booths, and employers have the chance to visit them. The event will showcase over 250 student candidates from;

- Toronto Metropolitan University, Ted Rogers School of Hospitality & Tourism Management
- Centennial College, School of Hospitality, Tourism & Culinary Arts
- George Brown College, School of Hospitality & Culinary Arts
- University of Guelph, School of Hospitality, Food & Tourism Management

Participating employers will gain access to more than 250 booths from hospitality and tourism students, each featuring detailed profiles and resumes. This presents an excellent opportunity for employers to virtually meet and engage with student candidates during the event, and schedule meetings for future conversations.

Growth in Sustainable Tourism

- OHTO stakeholders have sustainability at top of mind
 - Over 40% plan to enhance their sustainability efforts in 2024
- 40% have a sustainability statement or plan that guides their operations
 - 40% don't have either a statement or plan, but are interested to have one
- 30% track sustainability performance activities

Our Responsible Tourism Approach

Wander Sustainably



Inclusivity



Community



Sustainability

What does Wander Sustainably look like in action?

Your Grading:		PENDING		
		Platinum: 90 - 100 %	Your Score: 29%	
		Gold: 75 - 89 %		
		Silver: 55 - 74 %		
		Bronze: 35 - 54 %		
Section	Measure	Points Scored	Points Available	%
Management		31	84	37%
A.	Sustainability Management System	4	15	26%
B.	Risk, Crisis, and Emergency Management	6	10	57%
C.	Land Use Planning and Infrastructure Management	10	18	53%
D.	Business and Resident Engagement	5	10	51%
E.	Visitor Engagement	1	17	9%
F.	Marketing and Communications	6	14	41%
Social & Economic Impacts		23	65	35%
G.	Social Wellbeing	10	10	96%
H.	Impacts of Tourism on Residents	0	8	3%
I.	Local Employment and Labour Rights	2	9	24%
J.	Economic Impacts	6	24	26%
K.	Supporting Local and Sustainable Businesses	3	8	43%
L.	Accessibility	1	6	19%
Natural & Cultural Interactions		11	31	37%
M.	Cultural Heritage	6	13	45%
N.	Local Environment, Biodiversity, and Wildlife	6	18	31%
Environmental Impacts		10	81	12%
O.	Energy	2	15	12%
P.	Water Conservation	2	17	12%
Q.	Solid Waste	3	18	16%
R.	Wastewater	2	13	19%
S.	Emissions and Pollution	1	18	3%
TOTAL		75	261	29%

OHTO Commits to Sustainability by Signing 2030 Sustainability Pledge

August 08, 2023

We are excited to announce that the Ontario's Highlands Tourism Organization (OHTO) has signed the [Sustainable Tourism 2030 Pledge](#), to demonstrate our commitment to improving the sustainability performance of our organization, and as a destination, between now and 2030.

Sustainable Tourism 2030

“Sustainability is not just a catchphrase for us here at OHTO, managing our tourism destinations is a priority that will support not only our current visitors and residents, it will ensure our beautiful natural spaces and tourism assets are here for generations to come,” said Nicole Whiting, Executive Director.



How can you Wander Sustainably too?

1. Take the **Sustainable Tourism 2030 Pledge** and complete the **FREE Sustainable Score Form** with GreenStep Solutions
2. **Create an action plan** for the year to help you achieve your goal(s) and stay accountable
3. **Commit the time to learn** about sustainable tourism practices that interest you
4. **Remember, it's about the journey** and reaching the destination.



How To Stay On Top Of Trends

How To Stay On Top Of Trends

- **Subscribe and/or follow the sources we do**
- **Attend our Expand Your Knowledge webinars**
- **Register/Login to the OHTO Member Portal**
- **Read the monthly Highlands Highlight newsletter**
- **Book a Discovery Call**

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