

# NANAIMO / MID-ISLAND TOURISM BULLETIN

## October 2009

### Hotels Struggling

Nanaimo hotels' performance has been dismal throughout the past six months with severe pressure on occupancy and average daily rate. The previously strong domestic market has slowed and the US market is a long way from recovery.

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### Industry Points of Interest

- ◆ WestJet reported load factor of 77.3 % in October, a year-over-year improvement of 1.5 percentage points. Revenue passenger miles increased 0.3 % year over year, and capacity, measured in available seat miles, declined 1.8 % over the same period. Air Canada reported October traffic of 3.8 billion, compared to 3.9 billion in the prior year period. System load factor was 79.6% on a consolidated basis with Jazz, compared to 80.2% in October last year.
- ◆ Canada has kept its grip on second place in the latest Country Brand Index (CBI). FutureBrand, a New York-based global brand consultancy, released its fifth annual Country Brand index. In 2006, FutureBrand ranked Canada 12th; in 2007, Canada climbed to sixth; and then last year, leapt to the No. 2 spot behind Australia. This year, USA took top billing, while Australia slid to 3<sup>rd</sup> spot.
- ◆ The H1N1 epidemic has been declared a “national emergency” and the US Centers for Disease Control and Prevention is reporting the virus is now widespread in 46 of 50 states. According to the October 2009 Travelhorizons survey ([www.ypartenrhip.com](http://www.ypartenrhip.com)), 45% of US adults said they would postpone their trip until the outbreak subsided; one-third stated they would visit a different destination, and 31% said they would cancel the trip.

TOURISM STATISTICS	October		Variance	Year to Date		Variance
	2009	2008		2009	2008	
<b>Average Occupancy</b>	54.75%	59.82%	(5.07%)	58.53%	67.42%	(8.89%)
<b>Average Daily Room Rate</b>	\$99.63	\$99.02	\$0.61	\$108.66	\$104.81	\$3.85
<b>Revenue Per Available Room (RevPAR)</b>	\$54.55	\$59.23	(\$4.68)	\$63.60	\$70.66	(\$7.06)
<b>BC Ferries (Tsawwassen – Duke Point)</b>						
➤ Vehicles	52,395	47,139	11.15%	538,798	581,847	(7.40%)
➤ Passengers	116,003	108,063	7.35%	1,269,413	1,371,118	(7.42%)
➤ Buses	90	253	(64.43%)	2,081	1,347	54.49%
<b>BC Ferries (Horseshoe Bay – Departure Bay)</b>						
➤ Vehicles	100,569	100,024	0.54%	1,105,060	1,079,271	2.39%
➤ Passengers	269,247	270,306	(0.39%)	3,056,678	3,015,354	1.37%
➤ Buses	617	674	(8.46%)	6,861	7,369	(6.89%)
<b>Nanaimo Airport</b>	12,743	12,527	1.72%	127,629	137,421	(7.13%)
<b>Comox Airport</b>	23,837	23,220	2.66%	245,576	262,075	(6.30%)

Note: Quotations and reproductions of statistics provided in the Nanaimo Tourism Bulletin are permitted with credits to Chemistry Consulting Group.



# VICTORIA LODGING RESULTS

## October 2009

OCCUPANCY RATE %						
Lodging Type	Number of Rooms	October 2009	October 2008	YTD 2009	YTD 2008	
<b>Number of Rooms</b>						
Greater than 150	2,159	67.12%	70.95%	71.78%	72.19%	
100 - 150	757	54.27%	61.78%	60.97%	70.55%	
50 - 99	1,128	50.36%	51.84%	57.74%	61.62%	
Less than 50	353	54.39%	54.83%	60.94%	65.50%	
<b>Location</b>						
Downtown/Inner Harbour	3,291	63.51%	66.83%	69.12%	70.47%	
Suburban	486	44.19%	50.27%	49.70%	64.59%	
Gorge Road/Esquimalt	179	42.22%	53.65%	55.79%	60.76%	
Saanich Peninsula/Sidney	441	54.33%	54.46%	59.41%	63.14%	
<b>Tier</b>						
Upper	2,605	66.56%	70.13%	71.11%	71.85%	
Mid	1,370	53.79%	58.34%	61.23%	68.66%	
Lower	422	35.34%	38.32%	44.17%	50.31%	
<b>Lodging Type</b>						
Hotels	3,853	61.32%	65.74%	66.71%	69.84%	
Motels	544	47.30%	46.28%	56.47%	61.09%	
<b>Total Rooms</b>	<b>4,397</b>					
<b>Average Occupancy</b>		59.59%	63.32%	65.45%	68.75%	
ROOM RATE						
Lodging Type	Number of Rooms	October 2009	October 2008	YTD 2009	YTD 2008	
<b>Number of Rooms</b>						
Greater than 150	2,159	\$128.61	\$132.43	\$144.93	\$156.93	
100 - 150	757	\$88.12	\$89.52	\$102.41	\$109.52	
50 - 99	1,128	\$92.09	\$86.88	\$107.17	\$103.45	
Less than 50	353	\$116.55	\$126.30	\$132.80	\$146.17	
<b>Location</b>						
Downtown/Inner Harbour	3,291	\$117.97	\$120.58	\$133.18	\$143.07	
Suburban	486	\$96.12	\$100.64	\$110.03	\$116.61	
Gorge Road/Esquimalt	179	\$73.88	\$74.24	\$83.53	\$88.10	
Saanich Peninsula/Sidney	441	\$102.11	\$98.40	\$123.87	\$112.65	
<b>Tier</b>						
Upper	2,605	\$129.03	\$132.83	\$145.34	\$157.58	
Mid	1,370	\$86.27	\$87.13	\$99.76	\$105.61	
Lower	422	\$66.74	\$63.33	\$92.70	\$80.55	
<b>Lodging Type</b>						
Hotels	3,853	\$117.98	\$119.73	\$133.10	\$142.05	
Motels	544	\$71.91	\$73.05	\$91.34	\$85.15	
<b>Total Rooms</b>	<b>4,397</b>					
<b>Average Room Rate</b>		\$113.46	\$115.48	\$128.66	\$135.77	
REVENUE PER AVAILABLE ROOM (REVPAR)						
Lodging Type	Number of Rooms	October 2009	October 2008	YTD 2009	YTD 2008	
<b>Number of Rooms</b>						
Greater than 150	2,159	\$86.33	\$93.95	\$104.03	\$113.28	
100 - 150	757	\$47.82	\$55.30	\$62.44	\$77.27	
50 - 99	1,128	\$46.38	\$45.03	\$61.88	\$63.75	
Less than 50	353	\$63.39	\$69.25	\$80.92	\$95.74	
<b>Location</b>						
Downtown/Inner Harbour	3,291	\$74.93	\$80.58	\$92.06	\$100.82	
Suburban	486	\$42.48	\$50.60	\$54.69	\$75.32	
Gorge Road/Esquimalt	179	\$31.19	\$39.83	\$46.60	\$53.53	
Saanich Peninsula/Sidney	441	\$55.48	\$53.58	\$73.59	\$71.13	
<b>Tier</b>						
Upper	2,605	\$85.89	\$93.15	\$103.36	\$113.22	
Mid	1,370	\$46.41	\$50.83	\$61.08	\$72.51	
Lower	422	\$23.59	\$24.27	\$40.94	\$40.53	
<b>Lodging Type</b>						
Hotels	3,853	\$72.35	\$78.71	\$88.80	\$99.21	
Motels	544	\$34.01	\$33.81	\$51.58	\$52.02	
<b>Total Rooms</b>	<b>4,397</b>					
<b>Average REVPAR</b>		\$67.61	\$73.13	\$84.21	\$93.34	

Note: Comparative figures may vary due to an increase/decrease in the number of available rooms.

Quotations and reproductions of statistics provided in the Victoria Tourism Bulletin are permitted with credits to Chemistry Consulting Group.

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