

NANAIMO / MID-ISLAND TOURISM BULLETIN

April 2010

Back to the “New Normal”

Despite poor weather conditions, April proved to be a decent month for most operators. Hotel occupancy and rate were comparable to 2009; however, there is still some concern for future bookings as travellers continue to plan trips with shorter lead times. Bring on the sun for a stronger summer season!

Frank Bourree, Christine Stoneman, Charles Shier – Chemistry Consulting Group Inc.

Industry Points of Interest

- ◆ According to market research from NPD Group, Canadian restaurant traffic improved by 2.3% in the first quarter of 2010. By segment, the quick-service food services were up 3%, casual dining—2%, and midscale restaurants—1%. However, the average amount spent on meal was down 1.3%, suggesting that consumers are choosing less expensive menu items.
- ◆ Sooke Harbour House hotel owners were recognized at the Vancouver Magazine 21st Annual Restaurant Awards held May 18th in Vancouver. They received the Lifetime Achievement Award as well as the award for Best Restaurant on Vancouver Island.
- ◆ The International Air Transport Association (IATA) expects airlines to post a global profit of \$2.5 billion in 2010. This is a major improvement compared with the previous forecast released of a \$2.8 billion loss. Industry revenues are forecast to be \$545 billion in 2010. This is up from the \$483 billion in 2009, but still below the \$564 billion achieved in 2008. Passenger traffic is forecast to grow by 7.1% in 2010 while cargo traffic will expand by 18.5%. North American carriers are expected to return a profit of \$1.9 billion, which is a major reversal from the previously forecast \$1.8 billion loss.

TOURISM STATISTICS	April		Variance	Year to Date		Variance
	2010	2009		2010	2009	
Average Occupancy	53.01%	52.30%	0.71%	47.89%	48.12%	(0.23%)
Average Daily Room Rate	\$101.66	\$101.64	\$0.02	\$100.74	\$98.95	\$1.79
Revenue Per Available Room (RevPAR)	\$53.89	\$53.15	\$0.74	\$48.24	\$47.61	\$0.63
BC Ferries (Tsawwassen – Duke Point)						
➤ Vehicles	48,342	45,619	5.97%	167,528	158,538	5.67%
➤ Passengers	110,243	105,324	4.67%	377,696	361,242	4.55%
➤ Buses	80	221	(63.80%)	267	858	(68.88%)
BC Ferries (Horseshoe Bay – Departure Bay)						
➤ Vehicles	93,892	96,736	(2.94%)	307,433	335,594	(8.39%)
➤ Passengers	261,143	262,137	(0.38%)	895,261	894,559	0.08%
➤ Buses	531	669	(20.63%)	1,977	2,361	(16.26%)
Nanaimo Airport	13,220	12,564	5.22%	46,630	39,961	16.69%
Comox Airport	22,782	21,762	4.69%	88,909	82,835	7.33%

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



VICTORIA LODGING RESULTS

April 2010

OCCUPANCY RATE %					
Lodging Type	Number of Rooms	Apr 2010	Apr 2009	YTD 2010	YTD 2009
Number of Rooms					
Greater than 150	2,159	70.57%	72.63%	56.47%	61.90%
100 - 150	757	58.61%	59.34%	49.34%	51.37%
50 - 99	1,096	63.05%	55.08%	53.93%	49.90%
Less than 50	352	62.93%	62.74%	57.39%	53.25%
Location					
Downtown/Inner Harbour	3,169	69.97%	69.82%	56.93%	59.56%
Suburban	486	51.87%	43.65%	41.87%	40.86%
Gorge Road/Esquimalt	269	57.83%	56.20%	51.05%	51.07%
Saanich Peninsula/Sidney	440	57.95%	56.80%	54.80%	51.43%
Tier					
Upper	2,604	69.82%	71.63%	56.89%	61.12%
Mid	1,292	63.91%	59.67%	53.54%	53.25%
Lower	468	50.45%	41.69%	45.02%	36.60%
Lodging Type					
Hotels	3,820	67.81%	66.07%	55.27%	57.25%
Motels	544	53.21%	57.74%	50.36%	49.64%
Total Rooms	4,364				
Average Occupancy		65.99%	65.05%	54.68%	56.32%
ROOM RATE					
Lodging Type	Number of Rooms	Apr 2010	Apr 2009	YTD 2010	YTD 2009
Number of Rooms					
Greater than 150	2,159	\$123.32	\$123.96	\$117.31	\$117.00
100 - 150	757	\$85.07	\$86.49	\$82.69	\$82.14
50 - 99	1,096	\$87.42	\$85.96	\$81.59	\$80.23
Less than 50	352	\$104.34	\$112.48	\$97.92	\$104.17
Location					
Downtown/Inner Harbour	3,169	\$111.76	\$112.45	\$106.72	\$106.08
Suburban	486	\$103.50	\$100.33	\$92.00	\$90.03
Gorge Road/Esquimalt	269	\$62.67	\$67.08	\$61.27	\$65.03
Saanich Peninsula/Sidney	440	\$100.10	\$100.95	\$91.20	\$94.40
Tier					
Upper	2,604	\$123.83	\$124.82	\$117.71	\$117.39
Mid	1,292	\$83.83	\$82.93	\$78.98	\$78.19
Lower	468	\$62.69	\$60.46	\$58.33	\$58.44
Lodging Type					
Hotels	3,820	\$111.50	\$113.93	\$106.01	\$106.67
Motels	544	\$70.22	\$68.05	\$64.95	\$65.29
Total Rooms	4,364				
Average Room Rate		\$107.35	\$108.94	\$101.46	\$102.20
REVENUE PER AVAILABLE ROOM (REVPAR)					
Lodging Type	Number of Rooms	Apr 2010	Apr 2009	YTD 2010	YTD 2009
Number of Rooms					
Greater than 150	2,159	\$87.03	\$90.03	\$66.24	\$72.42
100 - 150	757	\$49.86	\$51.33	\$40.79	\$42.20
50 - 99	1,096	\$55.12	\$47.35	\$44.00	\$40.03
Less than 50	352	\$65.66	\$70.56	\$56.20	\$55.46
Location					
Downtown/Inner Harbour	3,169	\$78.20	\$78.51	\$60.76	\$63.18
Suburban	486	\$53.68	\$43.79	\$38.52	\$36.79
Gorge Road/Esquimalt	269	\$36.24	\$37.70	\$31.28	\$33.21
Saanich Peninsula/Sidney	440	\$58.01	\$57.34	\$49.98	\$48.55
Tier					
Upper	2,604	\$86.46	\$89.42	\$66.97	\$71.75
Mid	1,292	\$53.57	\$49.48	\$42.29	\$41.63
Lower	468	\$31.62	\$25.21	\$26.26	\$21.39
Lodging Type					
Hotels	3,820	\$75.61	\$75.27	\$58.59	\$61.07
Motels	544	\$37.36	\$39.29	\$32.71	\$32.41
Total Rooms	4,364				
Average REVPAR		\$70.85	\$70.86	\$55.48	\$57.56

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

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