

NANAIMO/MID-ISLAND TOURISM BULLETIN

November 2007

Season's Greetings!

The staff and partners of Chemistry Consulting Group wish you all a very Merry Christmas and a prosperous New Year!

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

Industry Points of Interest

- ◆ According to CanWest news Service, Canada's international travel deficit climbed to \$2.5 billion over the third quarter, the highest level in almost 16 years. Canadian travelers spent \$6.7 billion outside the country, out of which almost \$3.9 billion was spent in the US.
- ◆ The Canadian Restaurant and Foodservices Association's Preliminary Foodservice Forecast 2008 states that total Canada's foodservice industry sales will only grow slightly above the inflation at 3.3% over 2007. The menu inflation is forecast to be at 2.7% for 2008, resulting in real foodservice sales growth of 0.6%. The 2008 forecast marks a slight slowdown compared to a projected sales increase of 3.7% in 2007.
- ◆ For the fourth consecutive month, overnight visits from the Canadian Tourism Commission's key overseas markets have increased, by 1.1% in September to reach 344,061 trips. Trips from the US fell 2.7% while outbound trips by Canadians increased 15% over September 2006.
- ◆ According to this year's Country Brand Index (CBI), Australia once again earned the coveted spot as the world's top country brand, with the US ranking second and the UK ascending to third. Other countries making the top 10, in order, were: France, Italy, Canada, Spain, New Zealand, Greece, and Japan.

TOURISM STATISTICS	NOVEMBER		Variance	YEAR TO DATE		Variance
	2007	2006		2007	2006	
Average Occupancy	59.59%	58.50%	1.09%	68.11%	65.64%	2.47%
Average Daily Room Rate	\$92.72	\$86.36	\$6.36	\$102.91	\$97.02	\$5.89
Revenue Per Available Room (RevPAR)	\$55.25	\$50.52	\$4.73	\$70.09	\$63.68	\$6.41
BC Ferries (Tsawwassen – Duke Point)						
➤ Vehicles	43,255	34,118	26.78%	568,940	535,405	6.26%
➤ Passengers	94,199	76,060	23.85%	1,332,028	1,274,067	4.55%
➤ Buses*	55	55	0%	814	789	3.17%
BC Ferries (Horseshoe Bay – Departure Bay)						
➤ Vehicles	87,745	84,650	3.66%	1,232,224	1,227,524	0.38%
➤ Passengers	228,755	225,621	1.39%	3,388,660	3,418,591	-0.55%
➤ Buses	609	611	-0.33%	8,029	8,516	-5.72%
Nanaimo Airport	10,482	8,153	28.57%	128,279	127,240	0.82%
Comox Airport	21,906	17,533	24.94%	283,869	215,158	31.94%

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 Inc.

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VICTORIA LODGING RESULTS

November 2007

OCCUPANCY RATE %					
Lodging Type	Number of Rooms	November 2007	November 2006	YTD 2007	YTD 2006
Number of Rooms					
Greater than 150	2,159	54.05%	58.61%	73.80%	74.54%
100 - 150	757	50.11%	49.59%	73.60%	69.29%
50 - 99	1,072	44.34%	32.52%	61.62%	60.81%
Less than 50	356	41.88%	43.16%	67.53%	64.89%
Location					
Downtown/Inner Harbour	3,282	50.67%	54.08%	72.93%	71.66%
Suburban	488	51.14%	56.84%	65.77%	66.61%
Gorge Road/Esquimalt	179	45.31%	34.81%	57.39%	55.88%
Saanich Peninsula/Sidney	395	44.84%	44.63%	62.05%	61.65%
Tier					
Upper	2,558	53.56%	58.60%	73.60%	73.88%
Mid	1,365	47.68%	49.53%	71.22%	69.04%
Lower	421	35.63%	31.56%	50.75%	49.83%
Lodging Type					
Hotels	3,805	51.05%	53.13%	71.36%	70.34%
Motels	539	42.35%	42.70%	62.54%	59.56%
Total Rooms	4,344				
Average Occupancy		49.97%	51.77%	70.19%	68.95%
ROOM RATE					
Lodging Type	Number of Rooms	November 2007	November 2006	YTD 2007	YTD 2006
Number of Rooms					
Greater than 150	2,159	\$119.09	\$119.23	\$154.64	\$148.45
100 - 150	757	\$84.40	\$74.51	\$107.96	\$102.43
50 - 99	1,072	\$72.01	\$71.13	\$96.39	\$95.33
Less than 50	356	\$108.77	\$109.11	\$145.72	\$137.12
Location					
Downtown/Inner Harbour	3,282	\$107.27	\$108.32	\$141.10	\$136.30
Suburban	488	\$91.34	\$60.16	\$110.93	\$95.81
Gorge Road/Esquimalt	179	\$64.89	\$57.47	\$79.74	\$77.78
Saanich Peninsula/Sidney	395	\$84.61	\$86.73	\$112.66	\$103.44
Tier					
Upper	2,558	\$117.91	\$119.12	\$155.48	\$149.09
Mid	1,365	\$78.21	\$72.94	\$104.57	\$100.85
Lower	421	\$60.04	\$55.11	\$74.59	\$73.20
Lodging Type					
Hotels	3,805	\$106.21	\$103.47	\$139.38	\$131.62
Motels	539	\$66.28	\$63.98	\$81.77	\$81.02
Total Rooms	4,344				
Average Room Rate		\$102.01	\$99.22	\$132.56	\$125.96
REVENUE PER AVAILABLE ROOM (REVPAR)					
Lodging Type	Number of Rooms	November 2007	November 2006	YTD 2007	YTD 2006
Number of Rooms					
Greater than 150	2,159	\$64.37	\$69.87	\$114.13	\$110.65
100 - 150	757	\$42.30	\$36.95	\$79.46	\$70.97
50 - 99	1,072	\$31.93	\$23.13	\$59.39	\$57.97
Less than 50	356	\$45.56	\$47.10	\$98.41	\$88.97
Location					
Downtown/Inner Harbour	3,282	\$54.35	\$58.58	\$102.91	\$97.67
Suburban	488	\$46.71	\$34.19	\$72.96	\$63.81
Gorge Road/Esquimalt	179	\$29.40	\$20.01	\$45.76	\$43.46
Saanich Peninsula/Sidney	395	\$37.94	\$38.71	\$69.91	\$63.78
Tier					
Upper	2,558	\$63.15	\$69.81	\$114.44	\$110.15
Mid	1,365	\$37.29	\$36.13	\$74.47	\$69.63
Lower	421	\$21.39	\$17.39	\$37.85	\$36.47
Lodging Type					
Hotels	3,805	\$54.22	\$54.97	\$99.46	\$92.59
Motels	539	\$28.07	\$27.32	\$51.14	\$48.25
Total Rooms	4,344				
Average REVPAR		\$50.98	\$51.37	\$93.04	\$86.84

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

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