

# VICTORIA TOURISM BULLETIN

## August 2009

### Huge Average Room Rate Decline for August!

Hotel operators made brave efforts to prop up sagging room occupancies for August with deep discounting, but global economic events were too great and results were very poor. Weather conditions were outstanding.

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### Industry Points of Interest

- ◆ According to the latest Canadian Tourism Commission International Travel Account report, American spending in Canada fell to \$1.8 billion, a 10% reduction compared with the second quarter of 2008. However, Canadians travelling in the US cut their coats to suit their cloth even more: payments totaled \$4.1 billion, down 12%. Overall, Canada's travel deficit with the US fell by \$339 million over the same period of 2008, a 13% decrease.
- ◆ The Olympic Torch Relay Celebration for 2010 Winter Games will be launched in Victoria on October 30<sup>th</sup>, 2009. The event will kick off on Friday at the Inner Harbour and will feature multi-media presentations and performances.
- ◆ IATA Air Transport Market Analysis reports that although international air travel levels in August are still very depressed and remain below where they were last year, there was a further improvement in demand in August. The number of passenger-kilometers flown on international markets were 1.1% down on August last year, compared with a 2.9% year-over-year decline in July and a 7.6% first half fall.
- ◆ Air Canada domestic traffic sector increased 1.7% in August over August 2008; however, system-wide passenger traffic declined 0.9% in the same period. WestJet reported passenger traffic and available being down 4.7% and available seat capacity down 0.4% in August 2009.
- ◆ Aug Sunshine 295 hours (norm: 290.4 hours)                      ◆ Aug Precipitation 16.8 mm (norm: 23.9 mm)

TOURISM STATISTICS	August		Variance	Year to Date		Variance
	2009	2008		2009	2008	
<b>Average Occupancy</b>	79.44%	86.07%	(6.63%)	65.15%	68.82%	(3.67%)
<b>Average Daily Room Rate</b>	\$152.69	\$168.46	(\$15.77)	\$128.12	\$135.42	(\$7.30)
<b>Revenue Per Available Room (RevPAR)</b>	\$121.30	\$144.99	(\$23.69)	\$83.47	\$93.20	(\$9.73)
<b>BC Ferries (Tsawwassen - Swartz Bay)</b>						
➤ <b>Vehicles</b>	236,409	221,019	6.96%	1,293,553	1,282,600	0.85%
➤ <b>Passengers</b>	786,452	791,720	(0.67%)	4,011,040	4,106,505	(2.32%)
➤ <b>Buses</b>	3,000	3,754	(20.09%)	15,734	19,479	(19.23%)
<b>Victoria International Airport</b>	152,072	157,148	(3.23%)	1,024,682	1,046,142	(2.05%)
<b>Victoria Conference Centre (Delegate Days)</b>	810	900	(10.00%)	65,071	56,827	14.51%

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



# VICTORIA LODGING RESULTS

## August 2009

OCCUPANCY RATE %						
Lodging Type	Number of Rooms	August 2009	August 2008	YTD 2009	YTD 2008	
<b>Number of Rooms</b>						
Greater than 150	2,159	86.11%	88.10%	71.22%	71.54%	
100 - 150	757	73.85%	89.17%	60.79%	71.16%	
50 - 99	1,126	71.44%	80.33%	57.89%	62.42%	
Less than 50	357	76.19%	84.43%	60.50%	66.61%	
<b>Location</b>						
Downtown/Inner Harbour	3,290	83.32%	86.92%	68.68%	70.12%	
Suburban	486	64.70%	86.35%	49.14%	66.20%	
Gorge Road/Esquimalt	179	68.34%	78.83%	58.57%	61.76%	
Saanich Peninsula/Sidney	444	71.35%	81.82%	59.21%	64.40%	
<b>Tier</b>						
Upper	2,607	85.38%	87.59%	70.48%	71.27%	
Mid	1,370	74.72%	86.94%	61.24%	69.62%	
Lower	422	58.11%	74.06%	44.84%	51.48%	
<b>Lodging Type</b>						
Hotels	3,855	80.80%	86.73%	66.31%	69.62%	
Motels	544	69.81%	81.38%	56.87%	63.17%	
<b>Total Rooms</b>	<b>4,399</b>					
<b>Average Occupancy</b>		79.44%	86.07%	65.15%	68.82%	
ROOM RATE						
Lodging Type	Number of Rooms	August 2009	August 2008	YTD 2009	YTD 2008	
<b>Number of Rooms</b>						
Greater than 150	2,159	\$170.45	\$190.00	\$144.05	\$156.66	
100 - 150	757	\$125.96	\$137.24	\$102.13	\$109.98	
50 - 99	1,126	\$124.19	\$135.02	\$107.57	\$103.30	
Less than 50	357	\$170.57	\$198.28	\$132.18	\$145.64	
<b>Location</b>						
Downtown/Inner Harbour	3,290	\$158.88	\$178.28	\$132.45	\$142.85	
Suburban	486	\$125.76	\$135.41	\$109.69	\$116.50	
Gorge Road/Esquimalt	179	\$113.26	\$118.02	\$83.50	\$87.83	
Saanich Peninsula/Sidney	444	\$141.17	\$146.28	\$125.54	\$112.49	
<b>Tier</b>						
Upper	2,607	\$171.03	\$193.58	\$144.42	\$157.41	
Mid	1,370	\$124.52	\$138.66	\$99.81	\$105.99	
Lower	422	\$103.88	\$101.97	\$95.15	\$80.12	
<b>Lodging Type</b>						
Hotels	3,855	\$158.28	\$176.43	\$132.38	\$141.98	
Motels	544	\$106.90	\$108.69	\$92.74	\$84.50	
<b>Total Rooms</b>	<b>4,399</b>					
<b>Average Room Rate</b>		\$152.69	\$168.46	\$128.12	\$135.42	
REVENUE PER AVAILABLE ROOM (REVPAR)						
Lodging Type	Number of Rooms	August 2009	August 2008	YTD 2009	YTD 2008	
<b>Number of Rooms</b>						
Greater than 150	2,159	\$146.78	\$167.39	\$102.59	\$112.08	
100 - 150	757	\$93.02	\$122.38	\$62.09	\$78.27	
50 - 99	1,126	\$88.72	\$108.46	\$62.27	\$64.48	
Less than 50	357	\$129.96	\$167.41	\$79.96	\$97.01	
<b>Location</b>						
Downtown/Inner Harbour	3,290	\$132.37	\$154.97	\$90.96	\$100.17	
Suburban	486	\$81.37	\$116.92	\$53.91	\$77.12	
Gorge Road/Esquimalt	179	\$77.39	\$93.03	\$48.91	\$54.24	
Saanich Peninsula/Sidney	444	\$100.72	\$119.69	\$74.33	\$72.44	
<b>Tier</b>						
Upper	2,607	\$146.02	\$169.55	\$101.80	\$112.18	
Mid	1,370	\$93.04	\$120.55	\$61.12	\$73.79	
Lower	422	\$60.36	\$75.51	\$42.66	\$41.25	
<b>Lodging Type</b>						
Hotels	3,855	\$127.89	\$153.02	\$87.78	\$98.85	
Motels	544	\$74.63	\$88.45	\$52.74	\$53.38	
<b>Total Rooms</b>	<b>4,399</b>					
<b>Average REVPAR</b>		\$121.30	\$144.99	\$83.47	\$93.20	

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

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