

VICTORIA TOURISM BULLETIN

November 2009

A Tough Year Comes to a Close

Victoria tourism industry took a beating during 2009 from a variety of pressures, including: the US and Canadian economy, continued decline in the US market due to the border crossing issues, and price erosion due to severe competition regionally and internationally. Best wishes for a successful 2010!

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Industry Points of Interest

- ◆ The government of China granted Canada Approved Destination Status (ADS), a decision that will make it simpler for future Chinese travellers to obtain tourist visas and visit this country. The agreement also allows Chinese travel agencies to market and promote tour trips to Canada. A recent Conference Board of Canada survey estimates that number of travellers to Canada from China can increase by as much as 50% by 2015.
- ◆ WestJet reported load factor of 75.9% in November, a year-over-year decline from 76.1% in November last year. Revenue passenger miles (RPM) increased 3.1% over year, and capacity grew 3.4% over the same period. Air Canada reported a system load factor of 74.7% on a consolidated basis with Jazz, versus 77.6% in November 2008, a decrease of 2.9 percentage points. System traffic decreased 1.2% on a capacity increase of 2.7% system wide.
- ◆ According to the latest International Travel Report by the Canadian Tourism Commission, Canada's third-quarter travel deficit topped \$1.3 billion, a 33% increase on 2008. A drop in visitor numbers from overseas drove the decreases: Europe (-11%), South America (-12%), Asia (-15%), Oceania (-17%) and Mexico (-48%). American spending in Canada fell 8% to \$2.9 billion, while Canadians spent 7% less in the States compared with Q3 2008. Overall, Canada's travel deficit with the US rose by 0.4% on the same period of 2008, reaching \$662 million.
- ◆ Nov Sunshine 52.4 hours (norm: 75.2 hours) ◆ Nov Precipitation 273.8 mm (norm: 147.2 mm)

TOURISM STATISTICS	November		Variance	Year to Date		Variance
	2009	2008		2009	2008	
Average Occupancy	47.40%	49.15%	(1.75%)	63.85%	67.00%	(3.15%)
Average Daily Room Rate	\$101.24	\$101.56	(\$0.32)	\$126.86	\$133.52	(\$6.66)
Revenue Per Available Room (RevPAR)	\$47.98	\$49.92	(\$1.94)	\$81.00	\$89.46	(\$8.46)
BC Ferries (Tsawwassen - Swartz Bay)						
➤ Vehicles	120,039	121,437	(1.15%)	1,741,022	1,706,592	2.02%
➤ Passengers	339,558	348,344	(2.52%)	5,330,891	5,393,089	(1.15%)
➤ Buses	1,097	1,048	4.68%	21,205	25,649	(17.33%)
Victoria International Airport	115,044	113,317	1.52%	1,406,932	1,427,006	(1.41%)
Victoria Conference Centre (Delegate Days)	9,941	7,970	24.73%	128,058	106,833	19.87%

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



VICTORIA LODGING RESULTS

November 2009

OCCUPANCY RATE %					
Lodging Type	Number of Rooms	November 2009	November 2008	YTD 2009	YTD 2008
Number of Rooms					
Greater than 150	2,159	51.64%	55.29%	69.97%	70.68%
100 - 150	757	39.82%	42.13%	59.07%	68.01%
50 - 99	1,084	45.66%	44.31%	56.69%	60.07%
Less than 50	329	42.73%	41.31%	59.40%	63.33%
Location					
Downtown/Inner Harbour	3,223	50.02%	51.30%	67.44%	68.75%
Suburban	486	36.46%	39.52%	48.51%	62.35%
Gorge Road/Esquimalt	179	26.74%	41.97%	53.18%	59.07%
Saanich Peninsula/Sidney	441	48.68%	46.39%	58.45%	61.65%
Tier					
Upper	2,604	52.21%	54.71%	69.42%	70.32%
Mid	1,346	42.41%	44.84%	59.56%	66.53%
Lower	379	32.01%	29.52%	43.18%	48.45%
Lodging Type					
Hotels	3,791	48.32%	50.88%	65.09%	68.14%
Motels	538	40.89%	37.01%	55.08%	58.94%
Total Rooms	4,329				
Average Occupancy		47.40%	49.15%	63.85%	67.00%
ROOM RATE					
Lodging Type	Number of Rooms	November 2009	November 2008	YTD 2009	YTD 2008
Number of Rooms					
Greater than 150	2,159	\$114.75	\$115.35	\$142.93	\$154.02
100 - 150	757	\$81.49	\$80.35	\$101.14	\$107.91
50 - 99	1,084	\$82.79	\$77.32	\$105.47	\$101.72
Less than 50	329	\$101.39	\$114.06	\$130.89	\$144.29
Location					
Downtown/Inner Harbour	3,223	\$104.47	\$105.06	\$131.30	\$140.53
Suburban	486	\$91.24	\$93.41	\$108.77	\$115.29
Gorge Road/Esquimalt	179	\$66.51	\$68.59	\$82.76	\$86.86
Saanich Peninsula/Sidney	441	\$92.99	\$91.20	\$121.57	\$111.21
Tier					
Upper	2,604	\$115.54	\$116.29	\$143.33	\$154.71
Mid	1,346	\$76.58	\$76.57	\$98.30	\$103.85
Lower	379	\$57.01	\$59.36	\$90.55	\$79.40
Lodging Type					
Hotels	3,791	\$105.93	\$105.14	\$131.32	\$139.59
Motels	538	\$62.24	\$66.91	\$89.41	\$84.12
Total Rooms	4,329				
Average Room Rate		\$101.24	\$101.56	\$126.86	\$133.52
REVENUE PER AVAILABLE ROOM (REVPAR)					
Lodging Type	Number of Rooms	November 2009	November 2008	YTD 2009	YTD 2008
Number of Rooms					
Greater than 150	2,159	\$59.26	\$63.78	\$100.01	\$108.85
100 - 150	757	\$32.45	\$33.85	\$59.75	\$73.38
50 - 99	1,084	\$37.80	\$34.26	\$59.79	\$61.11
Less than 50	329	\$43.32	\$47.12	\$77.75	\$91.38
Location					
Downtown/Inner Harbour	3,223	\$52.25	\$53.89	\$88.55	\$96.61
Suburban	486	\$33.27	\$36.92	\$52.76	\$71.89
Gorge Road/Esquimalt	179	\$17.79	\$28.79	\$44.01	\$51.31
Saanich Peninsula/Sidney	441	\$45.27	\$42.31	\$71.06	\$68.56
Tier					
Upper	2,604	\$60.33	\$63.62	\$99.49	\$108.78
Mid	1,346	\$32.48	\$34.33	\$58.55	\$69.09
Lower	379	\$18.25	\$17.52	\$39.10	\$38.47
Lodging Type					
Hotels	3,791	\$51.18	\$53.49	\$85.47	\$95.11
Motels	538	\$25.45	\$24.77	\$49.25	\$49.58
Total Rooms	4,329				
Average REVPAR		\$47.98	\$49.92	\$81.00	\$89.46

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

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