

CHEMISTRY CONSULTING GROUP

VICTORIA TOURISM BULLETIN

December 2006

The US Market and Wild Weather Mark 2006

A decline in US visitation and wild weather conditions in the final quarter of 2006 marked an interesting year for the Victoria tourism industry. The total number of US visitors to BC dropped by 6.1% between January and October 2006 compared to the same period in 2005. However, an increase in domestic travel made up for this loss.

Frank Bourree, Principal – Chemistry Consulting Group

- ◆ According to the recently released second annual Country Brand Index (CBI) 2006, Canada took top honours as "Best Country Brand for Safety." Australia ranks top overall country brand, followed by the United States and Italy respectively.
- ◆ In 2006 port of Victoria received 182 cruise ships with 334,570 passengers, an increase of 8% in passengers over 2005. About 7 ships arrive in Victoria each week from May to October, which results in about \$30 million spent in Victoria each season by passengers and crew members.
- ◆ WestJet has reported its December traffic results which show a record year-to-date load factor of 78.2 per cent, compared to 74.6 per cent in 2005, an increase of 3.6 percentage points. Load factor for the month of December was 78 per cent, compared to 78.2 per cent in 2005.
- ◆ Victoria, British Columbia has been selected as the host city for the 2008 ICCA (International Congress and Convention Association) Congress and Exhibition. This will be ICCA's first congress in Canada.
- ◆ On Feb. 18, Victoria's Chinatown - the oldest Chinatown in Canada - will welcome the Year of the Boar with the annual Chinese Lion Dance.
- ◆ December Sunshine 50.3 hours (norm: 58.2 hours) ◆ December Precipitation 157.3 mm (norm: 151.2 mm)

TOURISM STATISTICS	DECEMBER		Variance	YEAR-TO-DATE		Variance
	2006	2005		2006	2005	
Average Occupancy	47.09%	51.46%	-4.37%	67.11%	66.92%	0.19%
Average Daily Room Rate	\$98.11	\$94.50	\$3.61	\$124.32	\$122.29	\$2.03
Revenue Per Available Room (RevPAR)	\$46.20	\$48.63	-\$2.43	\$83.43	\$81.84	\$1.59
BC Ferries (Tsawwassen - Swartz Bay)						
➤ Vehicles	143,563	147,134	-2.43%	1,908,005	1,916,853	-0.46%
➤ Passengers	425,221	448,322	-5.15%	6,048,413	6,141,662	-1.52%
➤ Buses	1,557	1,734	-10.21%	31,957	35,037	-8.79%
Victoria International Airport	110,989	111,100	-0.10%	1,390,128	1,318,395	5.44%
Victoria Conference Centre (Delegate Days)	1,521	2,625	-42.06%	117,919	110,900	6.33%

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

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VICTORIA LODGING RESULTS

December 2006

OCCUPANCY RATE %					
Lodging Type	Number of Rooms	Dec 2006	Dec 2005	YTD 2006	YTD 2005
Number of Rooms					
Greater than 150	1,803	49.75%	58.87%	72.43%	73.29%
100 - 150	757	45.32%	47.59%	67.26%	66.07%
50 - 99	1,038	32.93%	44.06%	59.58%	58.12%
Less than 50	356	41.88%	42.09%	62.91%	60.72%
Location					
Downtown/Inner Harbour	2,896	47.92%	55.10%	69.66%	69.54%
Suburban	332	47.06%	44.62%	65.13%	63.80%
Gorge Road/Esquimalt	331	41.13%	32.88%	54.60%	54.54%
Saanich Peninsula/Sidney	395	46.02%	44.00%	60.30%	57.50%
Tier					
Upper	2,122	50.32%	58.20%	71.92%	72.56%
Mid	1,287	46.71%	49.18%	67.13%	65.83%
Lower	545	35.42%	31.42%	48.65%	48.39%
Lodging Type					
Hotels	3,435	47.48%	53.48%	68.43%	68.32%
Motels	519	44.51%	38.36%	58.28%	57.83%
Total Rooms	3,954				
Average Occupancy		47.09%	51.46%	67.11%	66.92%
ROOM RATE					
Lodging Type	Number of Rooms	Dec 2006	Dec 2005	YTD 2006	YTD 2005
Number of Rooms					
Greater than 150	1,803	\$118.22	\$110.31	\$146.69	\$144.03
100 - 150	757	\$76.74	\$79.05	\$100.96	\$100.11
50 - 99	1,038	\$70.28	\$68.77	\$93.79	\$92.09
Less than 50	356	\$114.52	\$97.78	\$135.82	\$124.35
Location					
Downtown/Inner Harbour	2,896	\$106.55	\$100.48	\$134.57	\$132.60
Suburban	332	\$70.11	\$75.65	\$94.40	\$93.93
Gorge Road/Esquimalt	331	\$59.41	\$60.45	\$76.57	\$76.02
Saanich Peninsula/Sidney	395	\$86.65	\$69.80	\$102.34	\$83.23
Tier					
Upper	2,122	\$118.04	\$110.29	\$147.28	\$143.60
Mid	1,287	\$75.97	\$73.55	\$99.37	\$99.01
Lower	545	\$56.76	\$55.04	\$72.21	\$70.42
Lodging Type					
Hotels	3,435	\$102.84	\$98.06	\$129.95	\$128.13
Motels	519	\$64.71	\$62.28	\$79.96	\$77.72
Total Rooms	3,954				
Average Room Rate		\$98.11	\$94.50	\$124.32	\$122.29
REVENUE PER AVAILABLE ROOM (REVPAR)					
Lodging Type	Number of Rooms	Dec 2006	Dec 2005	YTD 2006	YTD 2005
Number of Rooms					
Greater than 150	1,803	\$58.81	\$64.94	\$106.24	\$105.56
100 - 150	757	\$34.78	\$37.62	\$67.90	\$66.14
50 - 99	1,038	\$23.14	\$30.30	\$55.87	\$53.52
Less than 50	356	\$47.96	\$41.15	\$85.44	\$75.50
Location					
Downtown/Inner Harbour	2,896	\$51.06	\$55.36	\$93.74	\$92.21
Suburban	332	\$32.99	\$33.76	\$61.48	\$59.93
Gorge Road/Esquimalt	331	\$24.43	\$19.88	\$41.81	\$41.47
Saanich Peninsula/Sidney	395	\$39.87	\$30.72	\$61.71	\$47.85
Tier					
Upper	2,122	\$59.40	\$64.19	\$105.91	\$104.20
Mid	1,287	\$35.48	\$36.17	\$66.71	\$65.18
Lower	545	\$20.11	\$17.29	\$35.13	\$34.07
Lodging Type					
Hotels	3,435	\$48.83	\$52.44	\$88.92	\$87.54
Motels	519	\$28.80	\$23.89	\$46.60	\$44.95
Total Rooms	3,954				
Average REVPAR		\$46.20	\$48.63	\$83.43	\$81.84

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

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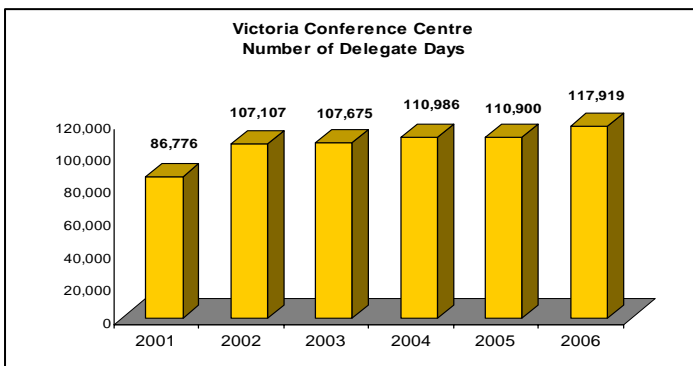
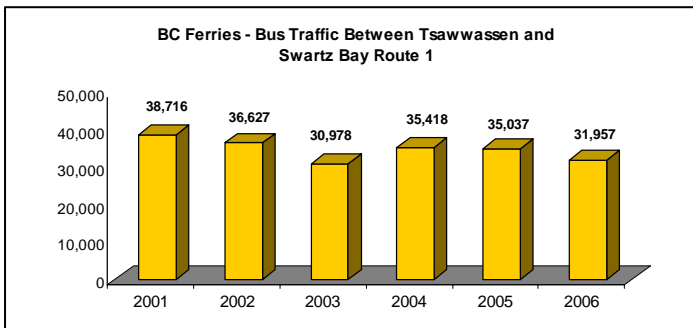
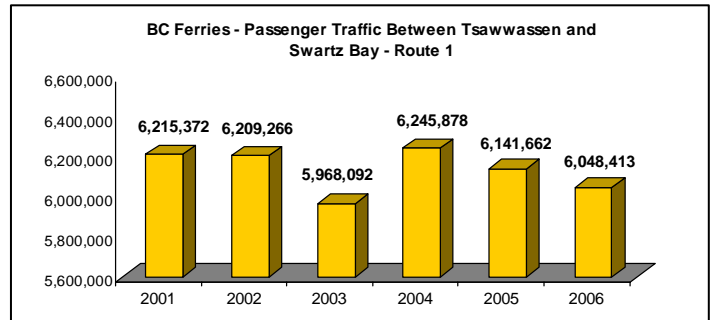
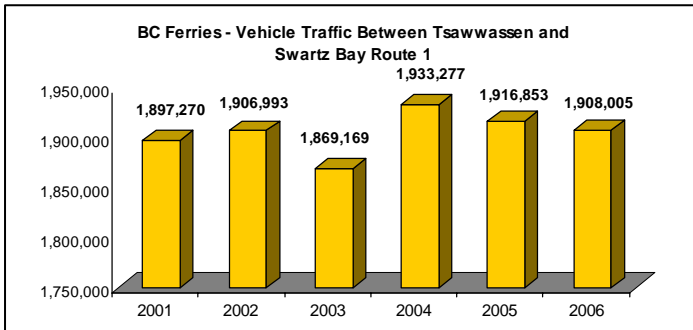
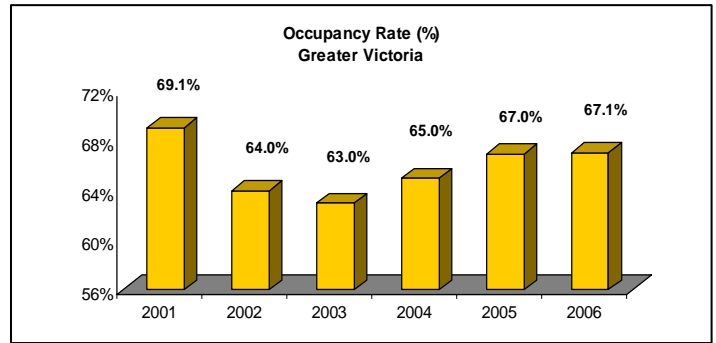
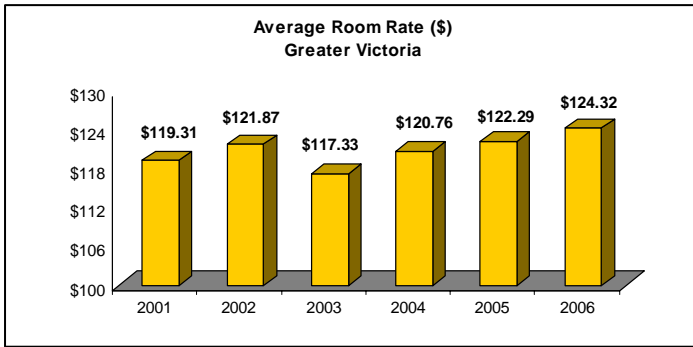
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2006 Year in Review Tourism Statistics – Greater Victoria



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