

VICTORIA TOURISM BULLETIN

May 2007

WHTI Causing U.S. Visitation Declines!

With over \$1.5 billion of trade daily across the “thickening” Canada / U.S. border, tourism operators are increasingly frustrated by the confusing messages from the U.S. on changing deadlines and requirements for WHTI.

Tourism BC reports that April year to date U.S. visitation to B.C. was down 7.2% (Canada-wide decline was 17.1%). Overnight visitation to B.C. was down only 3% versus 12.7% for same day traffic (primarily rubber tire). Canada-wide same day traffic is down 22.7%.

Frank Bourree, Principal – Chemistry Consulting Group Inc.

Industry Points of Interest

- ◆ Travel by Canadians abroad increased 5.0% in March to an estimated 3.9 million trips. The number of trips from U.S. and other countries went up 2.3% to 2.5 million.
- ◆ July 1 to 11th, Victoria will welcome the FIFA U-20 World Cup games. The world's finest youth players from Japan, Scotland, Nigeria and Costa Rica will show they skills at Royal Athletic Park. Literally hundreds of hotel rooms have been booked across Victoria as a result of this event.
- ◆ According to the NPD Group, a NY-based market research firm, dining traffic has slowed across all segments in the quarter ended February 2007. The casual dining traffic was flat, compared with the same period a year ago, quick service showed a 1% gain, midscale traffic was down 2%, and fine dining fell 4%.
- ◆ Foodservice is one of the of Canada's top job creators and employs nearly 1.2 million Canadians, including 232,000 Canadians indirectly employed as suppliers, distributors and consultants, and 44,000 Canadians under the age of 25, which represents nearly one in five jobs for youth.
- ◆ May Sunshine 284.7 hours (norm: 245.5 hours) ◆ May Precipitation 19.8 mm (norm: 36.5 mm)

TOURISM STATISTICS	MAY		Variance	YEAR-TO-DATE		Variance
	2007	2006		2007	2006	
Average Occupancy	76.48%	75.22%	1.26%	65.42%	64.47%	0.95%
Average Daily Room Rate	\$137.25	\$131.67	\$5.58	\$109.12	\$103.05	\$6.07
Revenue Per Available Room (RevPAR)	\$104.97	\$99.04	\$5.93	\$71.39	\$66.43	\$4.96
BC Ferries (Tsawwassen - Swartz Bay)						
➤ Vehicles	169,429	161,269	5.06%	699,197	686,536	1.84%
➤ Passengers	550,718	531,417	3.63%	2,069,413	2,051,052	0.90%
➤ Buses	3,413	3,552	-3.91%	9,337	9,831	-5.02%
Victoria International Airport	132,497	124,715	6.24%	589,539	553,192	6.57%
Victoria Conference Centre (Delegate Days)	15,321	15,059	1.74%	72,513	32,276	124.67%

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. and Grant Thornton LLP.

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VICTORIA LODGING RESULTS

May, 2007

OCCUPANCY RATE %						
Lodging Type	Number of Rooms	May 2007	May 2006	YTD 2007	YTD 2006	
Number of Rooms						
Greater than 150	2,157	82.45%	82.72%	68.88%	70.72%	
100 - 150	757	79.63%	75.38%	68.44%	62.19%	
50 - 99	1,144	64.46%	48.78%	57.49%	56.81%	
Less than 50	356	72.22%	65.24%	63.55%	61.26%	
Location						
Downtown/Inner Harbour	3,202	81.33%	78.52%	68.55%	67.53%	
Suburban	488	69.77%	73.69%	59.44%	57.66%	
Gorge Road/Esquimalt	329	52.26%	54.80%	53.21%	52.24%	
Saanich Peninsula/Sidney	395	65.59%	64.53%	57.70%	58.05%	
Tier						
Upper	2,476	82.17%	81.60%	69.42%	69.68%	
Mid	1,365	78.06%	72.82%	66.62%	63.73%	
Lower	573	48.11%	52.86%	45.32%	45.81%	
Lodging Type						
Hotels	3,817	78.90%	77.67%	66.45%	65.63%	
Motels	597	61.01%	59.07%	58.89%	56.67%	
Total Rooms	4,414					
Average Occupancy		76.48%	75.22%	65.42%	64.47%	
ROOM RATE						
Lodging Type	Number of Rooms	May 2007	May 2006	YTD 2007	YTD 2006	
Number of Rooms						
Greater than 150	2,157	\$161.99	\$156.23	\$129.31	\$122.11	
100 - 150	757	\$105.85	\$103.06	\$88.49	\$85.25	
50 - 99	1,144	\$101.15	\$101.17	\$77.84	\$76.08	
Less than 50	356	\$143.30	\$132.24	\$114.53	\$107.26	
Location						
Downtown/Inner Harbour	3,202	\$147.36	\$142.53	\$116.53	\$111.08	
Suburban	488	\$109.74	\$94.02	\$93.57	\$80.50	
Gorge Road/Esquimalt	329	\$79.07	\$80.77	\$62.60	\$60.81	
Saanich Peninsula/Sidney	395	\$110.45	\$101.29	\$93.30	\$85.59	
Tier						
Upper	2,476	\$163.14	\$156.45	\$129.65	\$122.68	
Mid	1,365	\$103.46	\$100.25	\$84.12	\$81.08	
Lower	573	\$76.85	\$74.96	\$60.63	\$57.37	
Lodging Type						
Hotels	3,817	\$144.16	\$137.56	\$115.15	\$107.94	
Motels	597	\$80.12	\$80.66	\$65.57	\$64.94	
Total Rooms	4,414					
Average Room Rate		\$137.25	\$131.67	\$109.12	\$103.05	
REVENUE PER AVAILABLE ROOM (REVPAR)						
Lodging Type	Number of Rooms	May 2007	May 2006	YTD 2007	YTD 2006	
Number of Rooms						
Greater than 150	2,157	\$133.56	\$129.22	\$89.07	\$86.35	
100 - 150	757	\$84.29	\$77.69	\$60.56	\$53.02	
50 - 99	1,144	\$65.20	\$49.36	\$44.75	\$43.22	
Less than 50	356	\$103.49	\$86.27	\$72.78	\$65.71	
Location						
Downtown/Inner Harbour	3,202	\$119.85	\$111.92	\$79.88	\$75.02	
Suburban	488	\$76.57	\$69.29	\$55.62	\$46.41	
Gorge Road/Esquimalt	329	\$41.32	\$44.26	\$33.31	\$31.77	
Saanich Peninsula/Sidney	395	\$72.45	\$65.37	\$53.83	\$49.68	
Tier						
Upper	2,476	\$134.05	\$127.66	\$90.00	\$85.49	
Mid	1,365	\$80.76	\$72.99	\$56.04	\$51.68	
Lower	573	\$36.97	\$39.62	\$27.48	\$26.28	
Lodging Type						
Hotels	3,817	\$113.74	\$106.84	\$76.51	\$70.84	
Motels	597	\$48.88	\$47.65	\$38.61	\$36.80	
Total Rooms	4,414					
Average REVPAR		\$104.97	\$99.04	\$71.39	\$66.43	

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

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