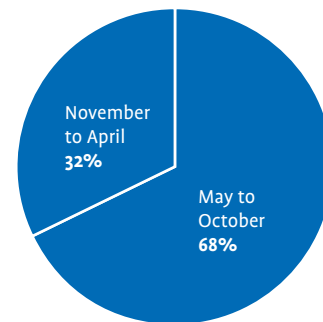


## Seasonality of Demand for Roofed Accommodation

HIGHLIGHTS

- 68% of the room nights sold in Nova Scotia in 2007 were sold between May and October, with 32% sold between November and April.
- Room nights sold increased slightly for November to April between 2003 and 2007. Conversely, room nights sold decreased for May to October.
- The average occupancy rate for May to October was 54% in 2007. The November to April average occupancy rate was 41%.
- Room nights sold in both May to October and November to April were up slightly in 2007 over 2006 levels.

Percentage of Room Nights Sold, by Season  
2007

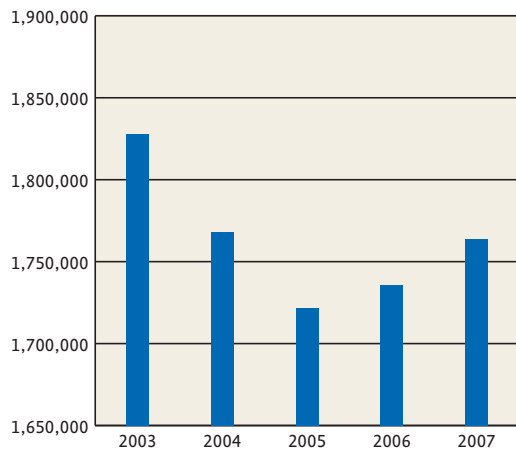


OVERVIEW

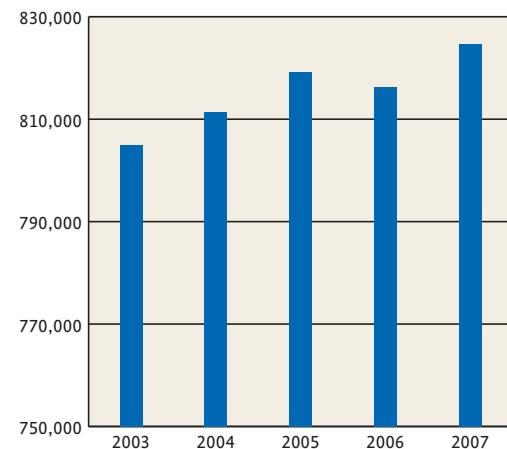
**Overview**

- The majority of accommodation demand in Nova Scotia occurs between May and October.
- 32% of the annual room nights in 2007 were sold between November and April, up from 30% in 2003.
- The number of room nights sold in November to April between 2003 and 2007 increased by 2%.
- Room nights sold in May to October declined by 4% during the past 5 years.

Room Nights Sold, May to October  
2003 to 2007



Room Nights Sold, November to April  
2003 to 2007

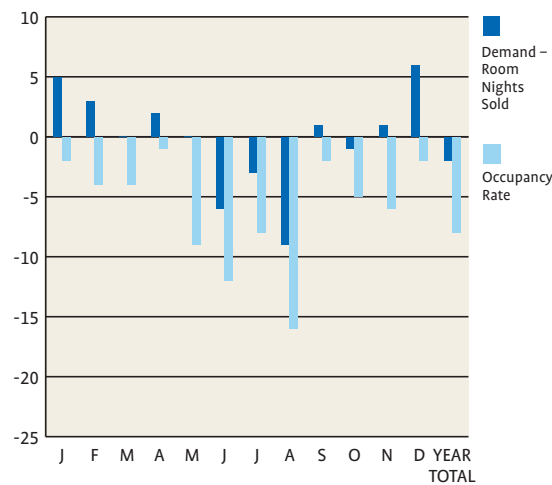


OCCUPANCY RATES AND TRENDS

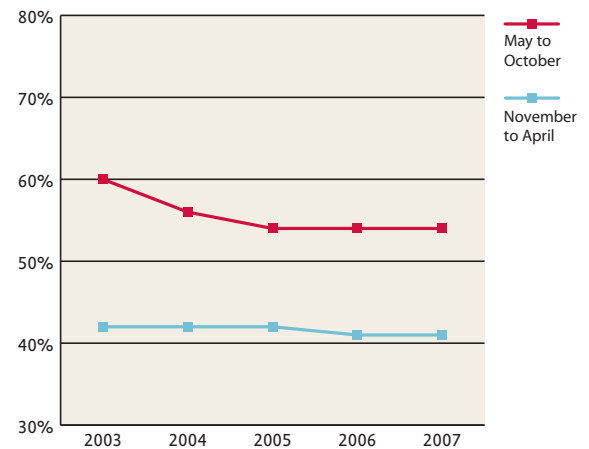
**Occupancy Rates and Overall Trends**

- Average occupancy rates for May to October were 54% in 2007, down from 42% in 2003. Part of this decline is due to universities which have lower than average occupancy rates. Room nights available at universities increased by 20% since 2003. When universities, hostels, apartments and 'other' category accommodation types are excluded, the average occupancy for May to October 2007 increases to 60%.
- Average occupancy rates for November to April were 41% in 2007, down from 42% in 2003.
- Room nights sold declined in June, July, August and October between 2003 and 2007, with August sales down almost 10%. The number of room nights sold in the province increased slightly in all other months.
- With an increase in the accommodation supply, occupancy rates declined in all months, with the most significant declines in May through August.

**Percentage Change in Demand and Occupancy**  
2003 to 2007, by Month and Annual Province Totals



**Comparison of May to October and November to April Occupancy Rates**  
2003 to 2007

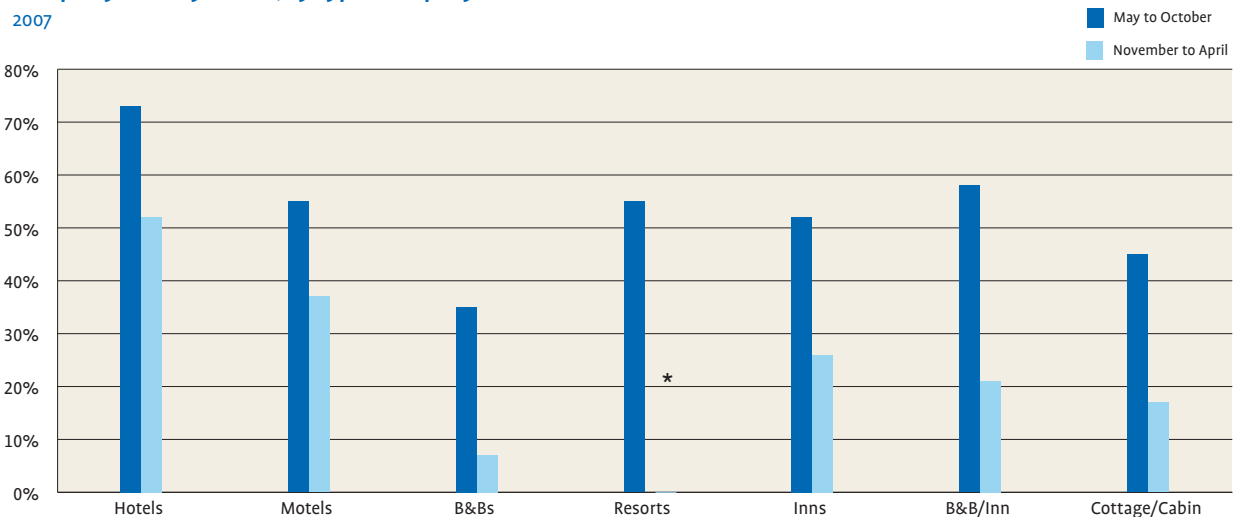


SEASONALITY OF DEMAND

**Seasonality of Demand by Type of Accommodation**

- Hotels had the highest occupancy rates both in May to October and November to April in 2007.
- B&Bs had the lowest occupancy rates in both periods.
- B&Bs/Inns had the largest gap in peak and non-peak season occupancy rates – nearly 40 percentage points.

**Occupancy Rates by Season, by Type of Property**  
2007



\* Not reported to protect the confidentiality of fewer than 6 properties

**Discussion**

- The seasonal variations in average occupancy rates in Nova Scotia are diminishing with peak season demand softening and winter season demand increasing slightly.
- The increases in demand November through April are primarily due to growth in activity in Halifax during this period, as a result of increased business, conference and special events travel.
- The increase in room nights sold for the November to April period has not offset the decline in the May to October months. This decline is particularly evident in what has traditionally been the peak tourism season in Nova Scotia, July and August.
- The significant declines in demand during the peak summer months are indicative of a softening in Nova Scotia's traditional summer vacation market.

**BACKGROUND****Introduction**

The Accommodation Bulletins are designed to provide insights into the supply and demand for Nova Scotia's roofed accommodation and campgrounds. Each bulletin addresses a different theme.

These bulletins complement *Tourism Insights* which provides monthly and annual data on accommodation activity for the province and tourism regions. The accommodation bulletins provide a five year trend analysis and show results by type of accommodation.

The audience for these bulletins includes:

- Accommodation and campground operators
- Potential investors and developers
- Real Estate appraisers
- Regional and municipal development agencies
- The tourism industry in general
- Consultants and researchers

**Research Methods**

Accommodation and campground businesses provide monthly occupancy data to the Department of Tourism, Culture and Heritage. Due to the significant cooperation of this sector, the reporting rate is 99%. To protect the confidentiality of individual operators, a minimum of 6 properties of similar size must be in a category for data to be released.

**Definitions**

**Room Nights Available** – The number of rooms (or units) of accommodation multiplied by the number of days that the property is open for business. A 'room' means one rentable unit. For cottages, cabins, and apartments, there may be several bedrooms in the unit but it is registered as one rentable accommodation unit. In contrast, for hostels, each bed is a separate rentable unit.

**Room Nights Sold** – The total number of rooms sold in a given period. For example, a motel selling 25 rooms each night during a 31 day month would have 775 room nights sold. Also referred to as occupied room nights.

**Occupancy Rate** – The number of room nights sold divided by the number of room nights available for any particular period. Expressed as a percentage.

**November to April** – November, December, and January to April of the calendar year in question.

**Property Types**

**Bed & Breakfast (B&B)** – usually up to 4 guestrooms available in a private home with ensuite, private or shared bathrooms, common living room, full or continental breakfast included in room rate.

**B&B Inn** – a bed & breakfast property with five or more rooms with breakfast included.

**Inn** – a property with ensuite or private bathrooms, guest living room, dining room serving breakfast and full evening meals. May have heritage or historic characteristics.

**Cottage/Cabin** – free-standing unit with one or more bedrooms (linens supplied) or bed-sitting area, a bathroom, possibly separate kitchen and/or living room.

**Hotel** – a property providing internally accessible, guestrooms, ensuite bathrooms, food service facilities, meeting and conference rooms.

**Motel** – a property with guestrooms under one roof, ensuite bathrooms, external and/or internal access to each guestroom.

## BACKGROUND – Continued

**Resort** – a property (may include cottages), with ensuite bathrooms, food service and extensive on-site recreational facilities; may offer conference facilities.