

Measuring Canadian Travel Patterns

JANUARY 1 - DECEMBER 05, 2021

2021 DATA VINTAGE



PURPOSE

- The Measuring Canadian Travel Patterns dashboard created by Environics Analytics helps the Canadian travel and tourism industry understand the impact of the worldwide COVID-19 pandemic as it relates to Domestic Overnight Visitors within Canada, its **provinces, territories, and tourism regions**.
- With this dashboard we can easily compare visitor travel patterns (to prior weeks in 2021 and year over year 2019, and 2020).
- We can also compare different regions to assess the impact of the pandemic on Canadian travel patterns and identify when visitors start to return to British Columbia's respective tourism regions.



METHODOLOGY

- Environics Analytics uses privacy compliant, anonymized mobile movement data to identify devices whose **Daily Common Evening Location** is 60 km or more away from their *Yearly Common Evening Location*.
- Data is aggregated and compared on a weekly basis versus the previous year and week.
 - (**Note:** Year over year data may not compare the exact same date range).
- Data is limited to devices that we can reliably infer their *Daily* and *Yearly* Common Evening Locations.
- Data has been standardized and normalized leveraging demographic data and PRIZM, their neighbourhood classification system.



GLOSSARY

- **Timeframe:** The dashboard data starts the week of January 3, 2021 and is tracked on a weekly basis.
- **Domestic Overnight Visitors:** Extrapolated from a sample of mobile devices that spent at least one night more than 60KM away from their Yearly Common Evening Location.
- **Common Evening Location:** A location where the device is normally seen between 6PM and 8AM the following morning.



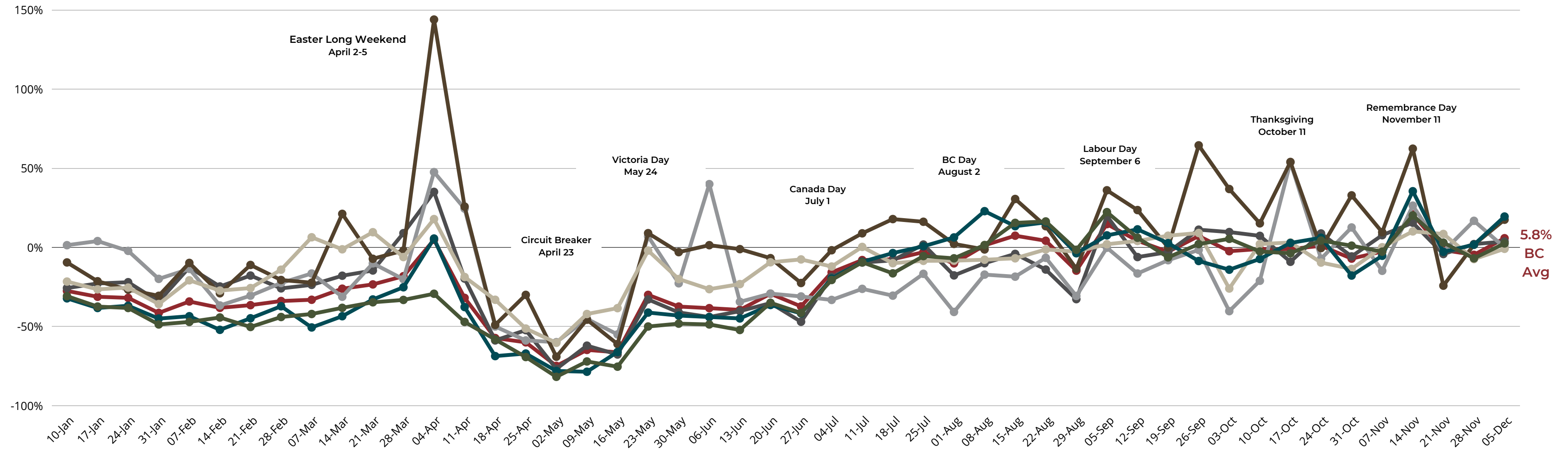
INTRODUCTION

- Environics Analytics' Weekly Tourism Tracker filters data by Canada, Province or Territory. R1 or Region 1 is selected as the region from which to make comparisons, in this case, the province of BC.
- R2 or Region 2 represents the comparison region, in this case each of the regions of BC.
- **BC Regions:**
 - Cariboo Chilcotin Coast
 - Kootenay Rockies
 - Northern B.C
 - Thompson-Okanagan
 - Vancouver Island
 - Vancouver, Coast & Mountains



DOMESTIC OVERNIGHT VISITORS - WEEKLY YEAR OVER YEAR (2019 VS. 2021) VARIATION

B.C. REGIONS



Key Findings:

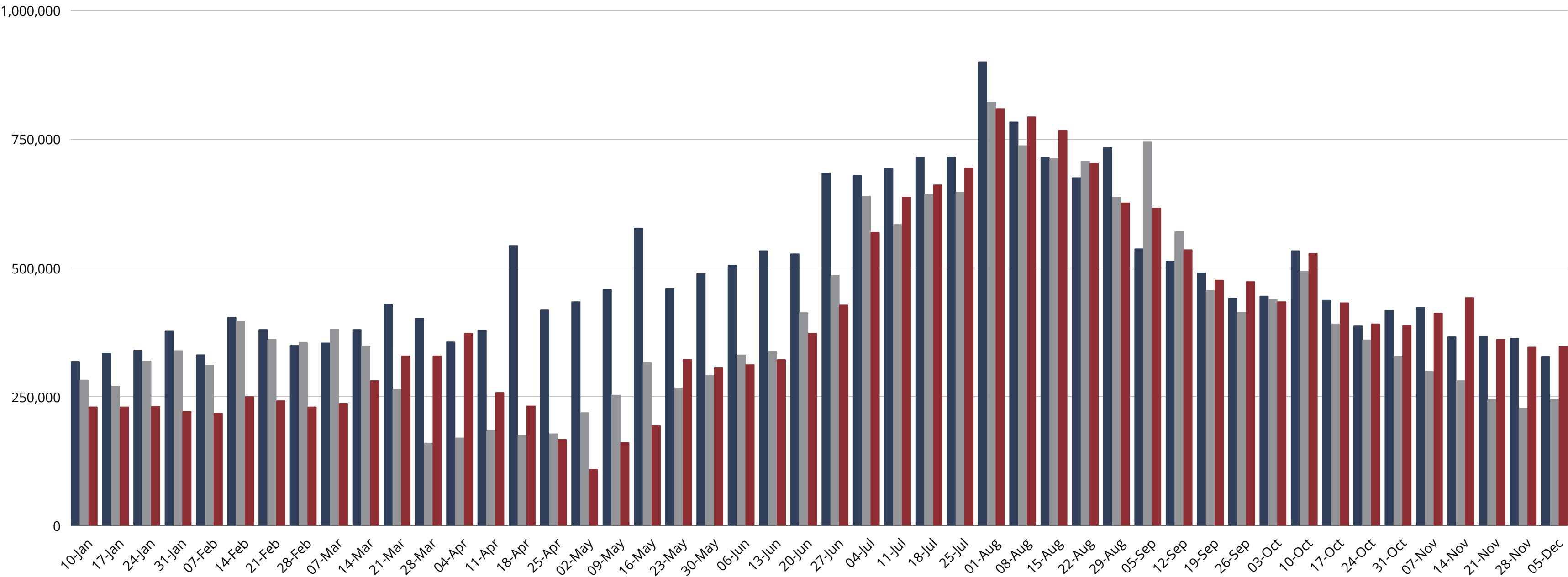
- Average Domestic Overnight Visitation to BC for Week 48 (Nov. 29-Dec 5, 2021) is **up 5.8%** compared to the same week in 2019.
- All regions with the exception of the Cariboo Chilcotin Coast saw an **increase** in visitation when comparing Week 47 (Nov. 22-28, 2021) to Week 48 (Nov. 29-Dec 5, 2021).
- British Columbia **increased by 10.5%** when comparing Week 47 (Nov. 22-28, 2021) to Week 48 (Nov. 29-Dec 5, 2021).

Notes:

- The baseline of comparison is now 2019, with percentages above 0% indicating higher rates of visitation in 2021 than 2019, and percentages below 0% indicating lower rates of visitation in 2021 than 2019.
- BC issued a new order to limit non-essential travel within the Province on April 23, 2021 resulting in a drop in visitation during the week ending May 2.
- The provincial reopening plan was announced on May 25, 2021 with recreational travel being allowed within travel regions, leading to slight increases the following weeks and further slight increases since Step 2 of reopening plan began on June 15.
- The Weeks of March 28 (Good Friday), April 4 (Easter Monday), May 23 (Victoria Day), July 4 (Canada Day), August 2 (BC Day), September 6 (Labour Day), October 11 (Thanksgiving), November 11 (Remembrance Day) were Long Weekends
- Data is compared on a week-by-week basis and may not reflect the exact same date range year over year. Increases and decreases are in the differential in visitor volume year over year.

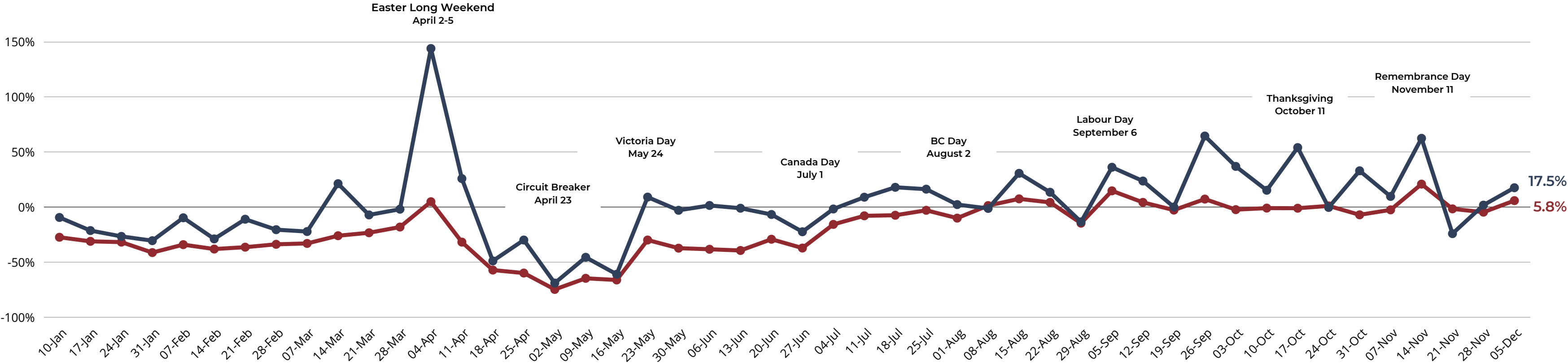
DOMESTIC OVERNIGHT VISITORS - WEEKLY YEAR OVER YEAR (2019, 2020, 2021) VARIATION

BRITISH COLUMBIA



DOMESTIC OVERNIGHT VISITORS - WEEKLY YEAR OVER YEAR (2019 VS. 2021) VARIATION

KOOTENAY ROCKIES



Key Findings:

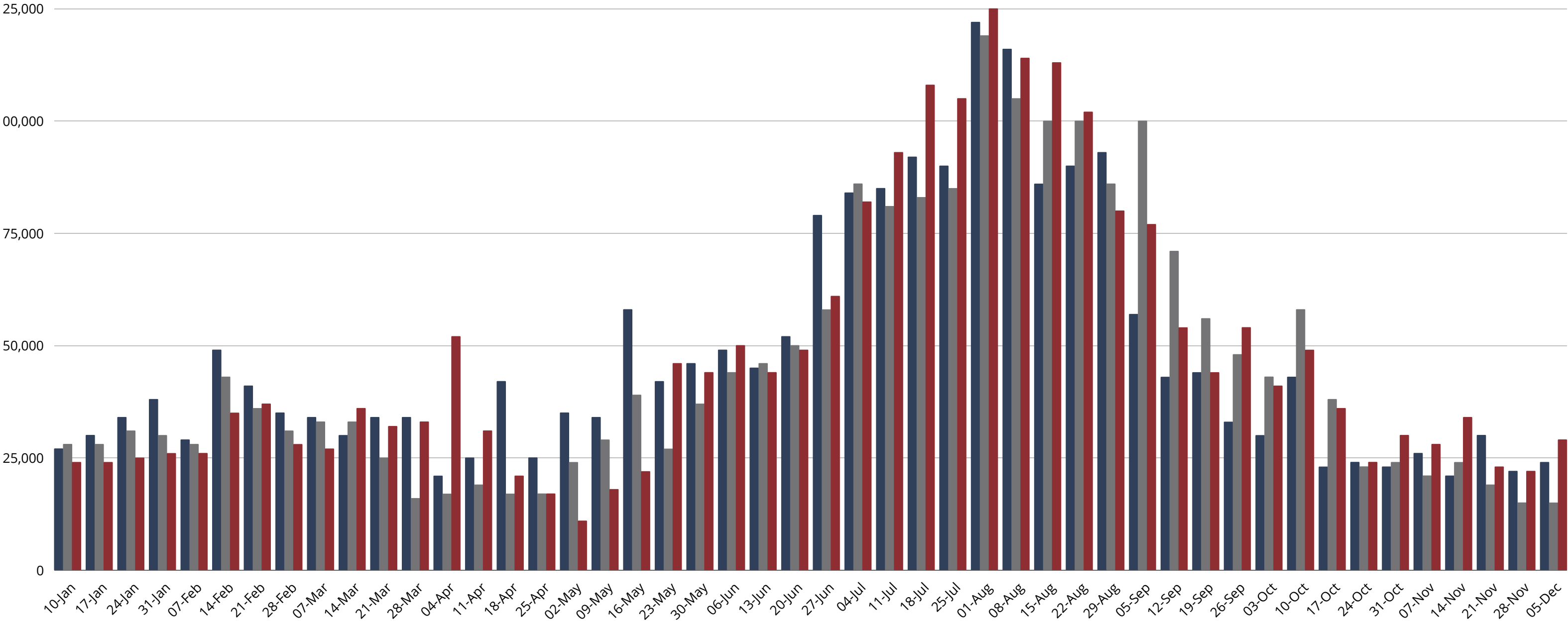
- Domestic Overnight Visitation to the Kootenay Rockies for Week 48 (Nov. 29-Dec 5, 2021) is **up 17.5%** compared to the same week in 2019
- The Kootenay Rockies saw **11.7% more visitation** when compared to British Columbia during Week 48 (Nov. 29-Dec 5, 2021).
- Visitation to the Kootenay Rockies **increased by 15.8%** and British Columbia **increased by 10.5%** when comparing Week 47 (Nov. 22-28, 2021) to Week 48 (Nov. 29-Dec 5, 2021).

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DOMESTIC OVERNIGHT VISITORS - WEEKLY YEAR OVER YEAR (2019, 2020, 2021) VARIATION

KOOTENAY ROCKIES



STR Destination Report

NOVEMBER 28, 2021 TO DECEMBER 04, 2021



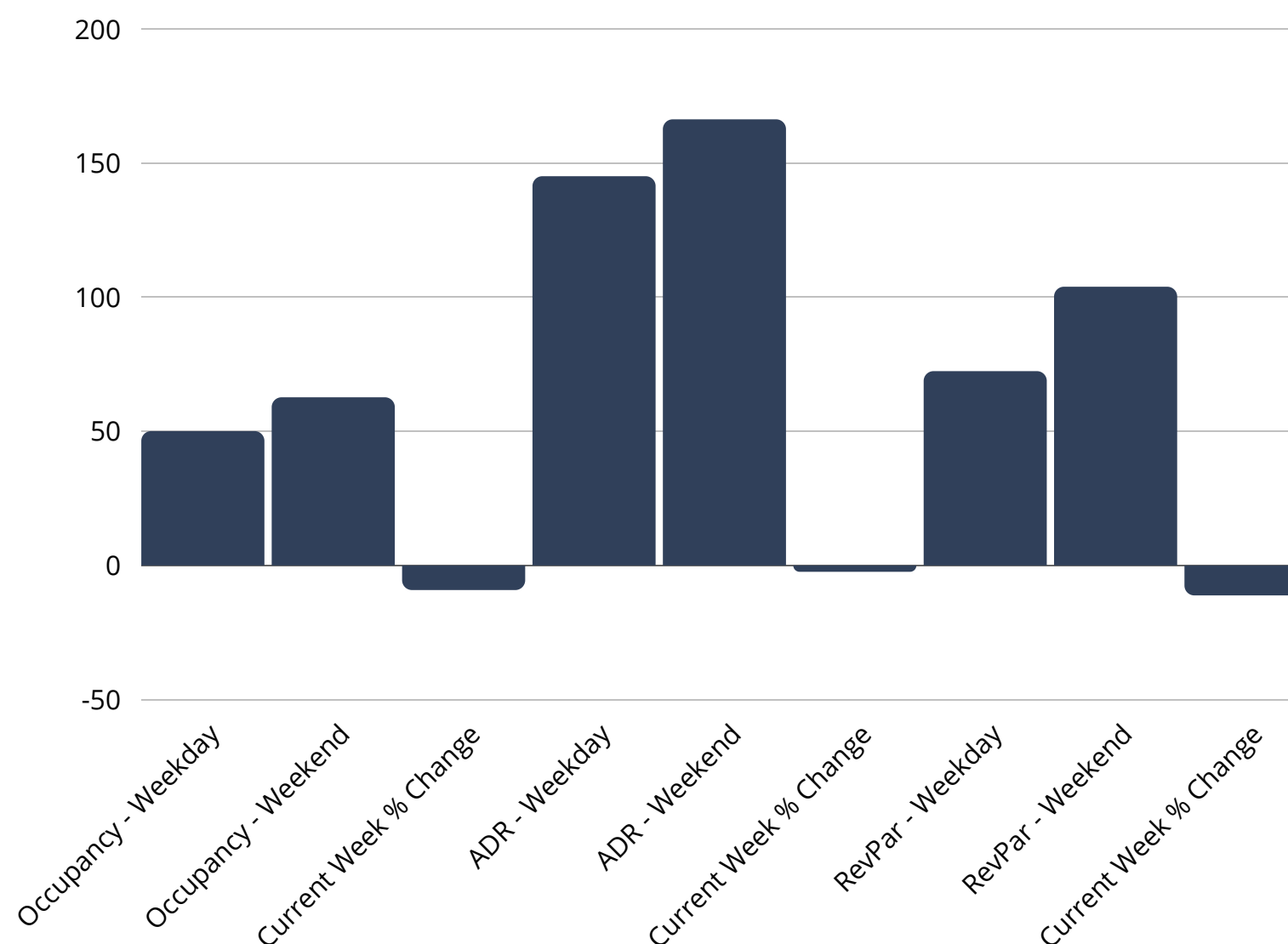
STR SUMMARY BC & REGIONS

NOV 28 - DECEMBER 04, 2021

- British Columbia had a **49.8%** occupancy from Sunday - Thursday and a **62.4%** occupancy during the weekend, down **-8.9%** compared to the same week in 2019.
- British Columbia had an ADR of **\$144.80** from Sunday - Thursday and an ADR of **\$166.00** during the weekend, down **-2.1%** compared to the same week in 2019.
- British Columbia had a RevPAR of **\$72.15** from Sunday - Thursday and a RevPAR of **\$103.61** during the weekend, down **-10.9%** compared to the same week in 2019.

REGIONAL STATS WEEKEND OF Dec 03-04, 2021:

- Cariboo Chilcotin Coast: OCC 62.1% ADR \$127.26 REVPAR \$79.03
- Kootenay Rockies: OCC 37.0% ADR \$126.89 REVPAR \$46.99
- Northern BC: OCC 54.8% ADR \$121.52 REVPAR \$66.64
- Thompson Okanagan: OCC 56.5% ADR \$123.56 REVPAR \$69.78
- Vancouver Island: OCC 65.9% ADR \$169.78 REVPAR \$111.89
- Vancouver: OCC 66.8% ADR \$174.07 REVPAR \$116.24
- Whistler: OCC 82.1% ADR \$323.65 REVPAR \$265.76



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GLOSSARY

- **Occupancy:** Calculated by the number of occupied rooms divided by the number of available rooms that physically exist in a hotel
- **Average Daily Rate (ADR):** Represents the average rental income per paid occupied room in a given time period, however, ADR itself cannot be used to measure a hotel's performance
- **Revenue per Available Room (RevPAR):** Calculated by multiplying a hotel's ADR by its occupancy rate, an increase in RevPAR most likely indicates an improvement in occupancy rate and can be used to measure a hotel's performance

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