

Measuring Canadian Travel Patterns

October 11, 2023 Update

2023 Weekly Report



Purpose

2023 Visitor
Highlights

bcrts

- As the tourism industry navigates recovery from the COVID-19 global pandemic, the British Columbia Regional Tourism Secretariat (BCRTS) continues to provide baseline research to support the industry as it moves forward
- The Measuring Canadian Travel Patterns report was created to help industry understand their weekly domestic visitors
- By combining the weekly STR report and Envionics' VisitorView data, industry has up to date insights for their destination and can plan strategically how and what visitors to attract
- This report focuses on visitor analysis to **British Columbia**





VisitorView 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.

Notes:

- Data is based on the movement of mobile devices travelling within BC from BC or the rest of Canada who have spent one night 60 kms from their mobile device's home location. Therefore it includes all mobile movement - work and contractor travel, relocations within six months' time, visiting friends and relatives and people moving around their own regions.
- The baseline of comparison is 2022, with percentages above 0% indicating higher rates of visitation in 2023 than 2022, and percentages below 0% indicating lower rates of visitation in 2023 than 2022.
- Weekly comparisons may not reflect the exact same date between the two comparison years. Therefore holiday weekends may fall on different weeks and result in higher peaks in the current year. Please refer to the Appendix for date conversions.

STR Methodology

- On a daily, weekly and monthly basis, STR processes performance data from hotels all across BC and the world. This data is submitted straight from the source: chain headquarters, management companies, owners and directly from independent hotels. The data used to understand the BC tourism regions' performance compared to BC as a whole and to each other.
- STR delivers confidential data on hotel occupancy, Average Daily Rate (ADR) and Revenue per Available Room (RevPar), for markets such as the tourism regions of BC and for individual companies who participate.

- **Participate in the STR “STAR” report: Submit your data and receive free reports benchmarking your performance against your market. Sign up today for free here:**

<https://surveys.str.com/s3/Hotel-Enrollment-Form>

(or)

- **Email info@str.com to request more information**



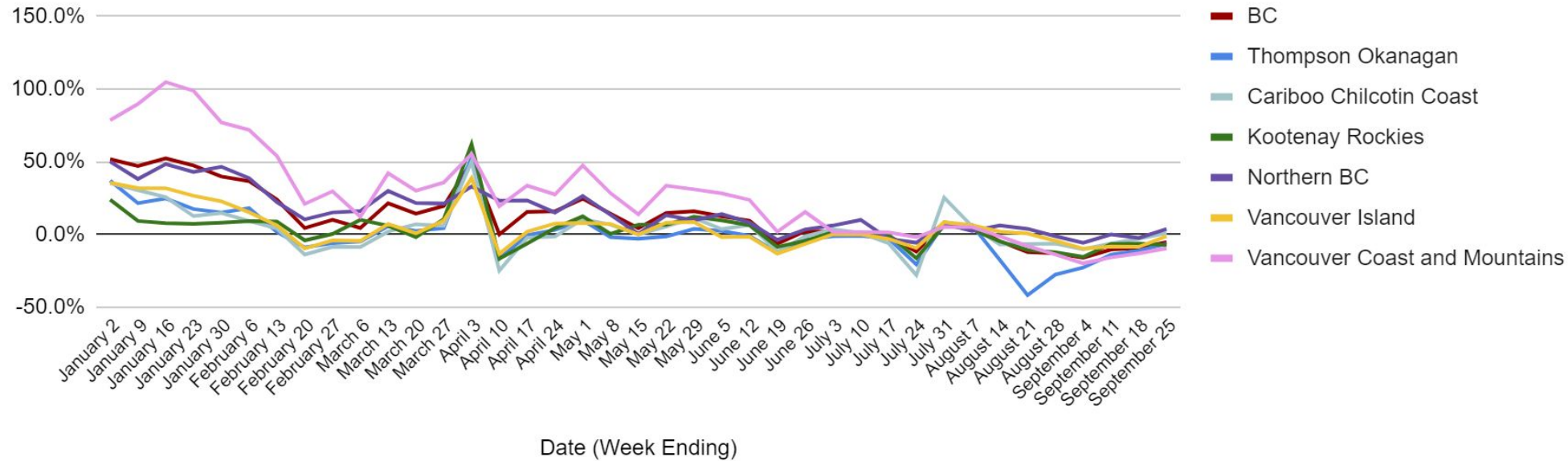


Domestic Overnight Visitors

Environics Canada

Domestic Overnight Visitors - Weekly Year Over Year (2023 vs. 2022) Variation

BC & Regions



Long Weekends and Holidays observed so far:

- New Years Day
- Family Day
- Good Friday
- Victoria Day
- Canada Day

Key Findings

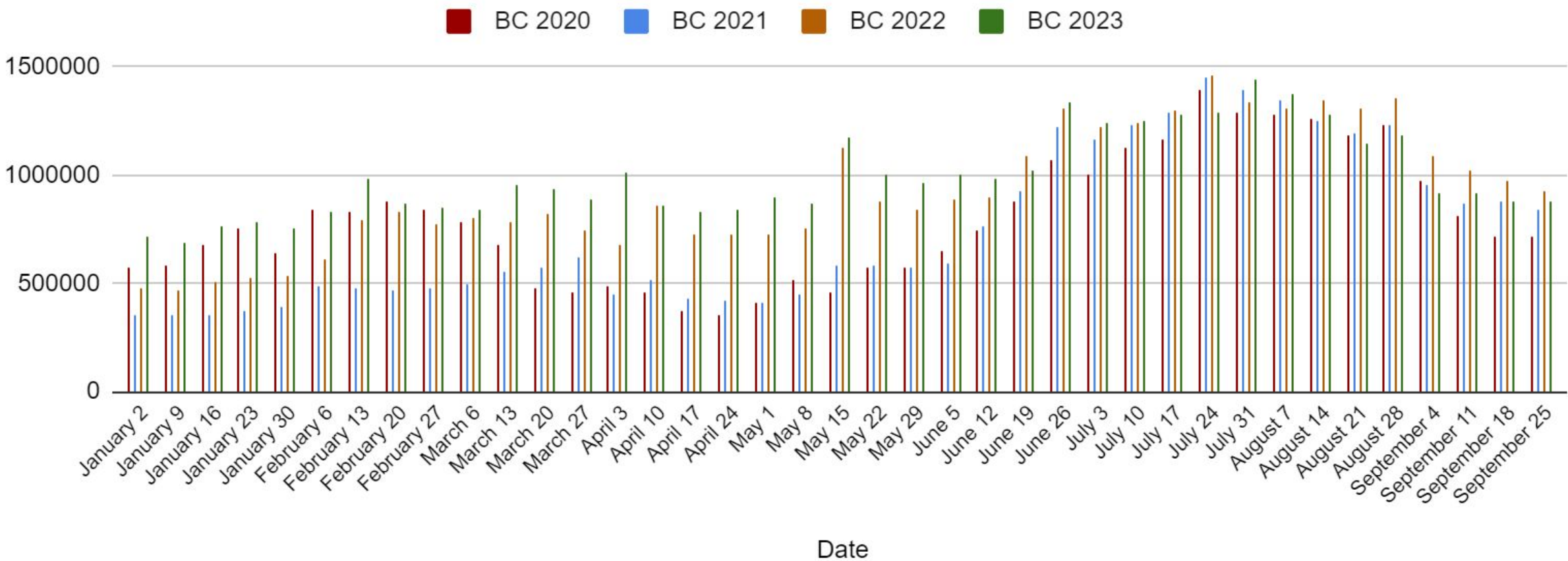
- Average Domestic Overnight Visitation to BC for Week 39 (September 25 - September 31, 2023) is **down 5.5%** compared to the same week in 2022.
- When comparing Week 39 to Week 38 (September 18 - September 24, 2023), all regions except for Vancouver Coast and Mountains saw an **increase** in visitation.
- British Columbia **decreased 0.3%** when comparing Week 39 to Week 38 (September 18 - September 24, 2023).

Notes:

- The baseline of comparison is 2022, with percentages above 0% indicating higher rates of visitation in 2023 than 2022, and percentages below 0% indicating lower rates of visitation in 2023 than 2022.
- Weekly comparisons may not reflect the exact same date between the two comparison years. Therefore holiday weekends may fall on different weeks and result in higher peaks in the current year. Please refer to the Appendix for date conversions. Ex. Good Friday was April 15 in 2022, and April 7 in 2023, this created a leap/fall when comparing year over year.

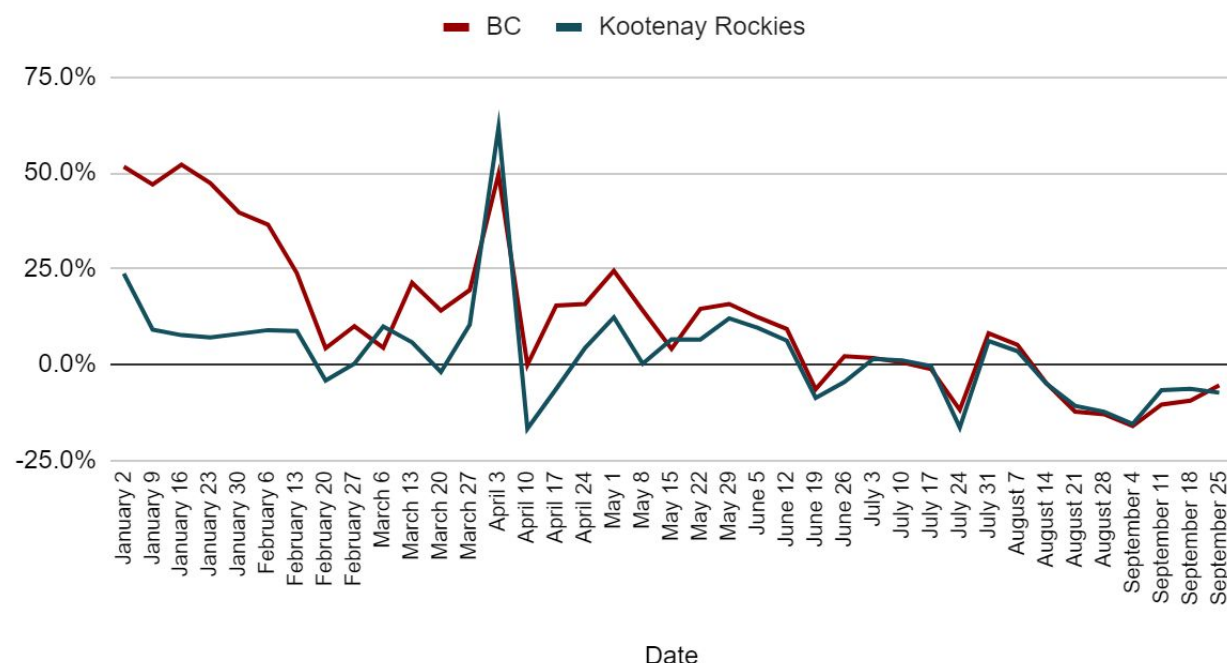
Domestic Overnight Visitors Count - Weekly Year Over Year (2020, 2021, 2022, 2023)

British Columbia



Domestic Overnight Visitors - Weekly Year Over Year (2023 vs 2022) Variation

Kootenay Rockies



Key Findings

- Domestic Overnight Visitation to the Kootenay Rockies for Week 39 (September 25 - September 31, 2023) was **down 7.4%** compared to the same week in 2022
- Visitation to the Kootenay Rockies **decreased by 8.6%** comparing current week to the previous week
- British Columbia **decreased 0.3%** when comparing current week to the previous week
- Year over year Kootenay Rockies saw **1.9% less** visitation when compared to British Columbia

Long Weekends and Holidays observed so far:

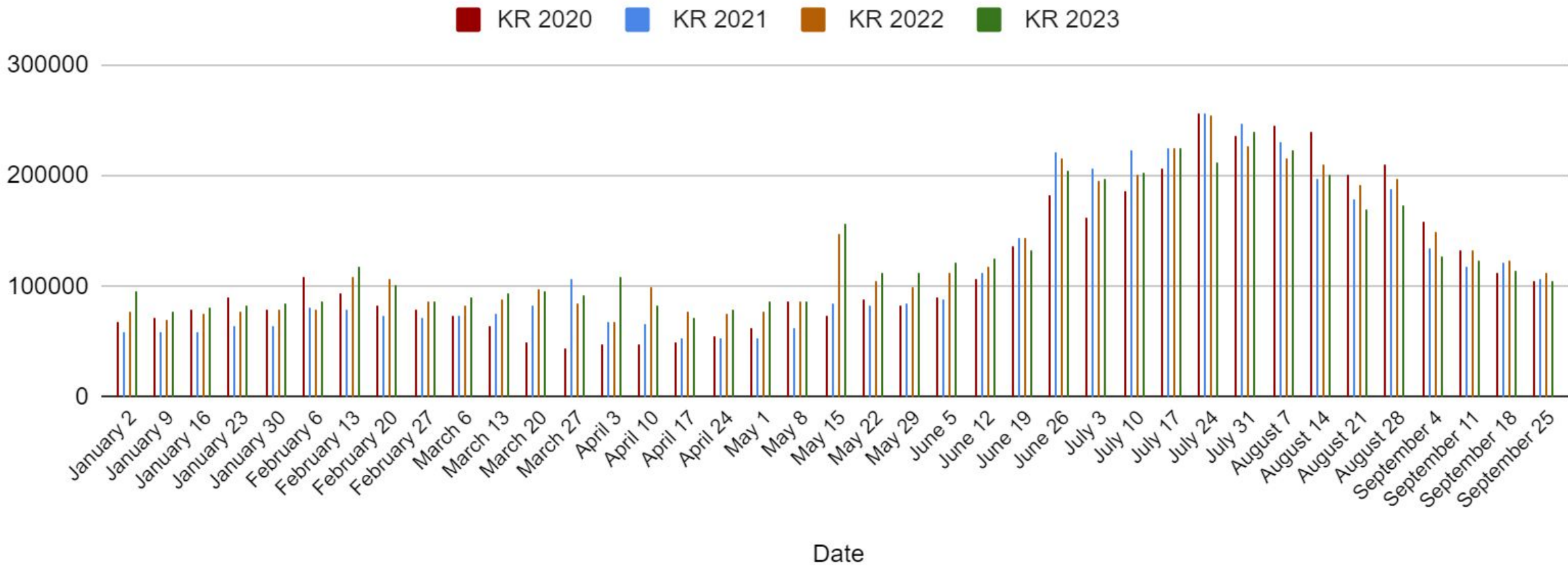
- New Years Day
- Family Day
- Good Friday
- Victoria Day
- Canada Day

Notes:

- The baseline of comparison is 2022, with percentages above 0% indicating higher rates of visitation in 2023 than 2022, and percentages below 0% indicating lower rates of visitation in 2023 than 2022.
- Weekly comparisons may not reflect the exact same date between the two comparison years. Therefore holiday weekends may fall on different weeks and result in higher peaks in the current year. Please refer to the Appendix for date conversions. Ex. Good Friday was April 15 in 2022 (week of April 11) and April 7 in 2023 (week of April 3), this created a leap/fall when comparing year over year.

Domestic Overnight Visitors Count - Weekly Year Over Year (2020, 2021, 2022, 2023)

Kootenay Rockies





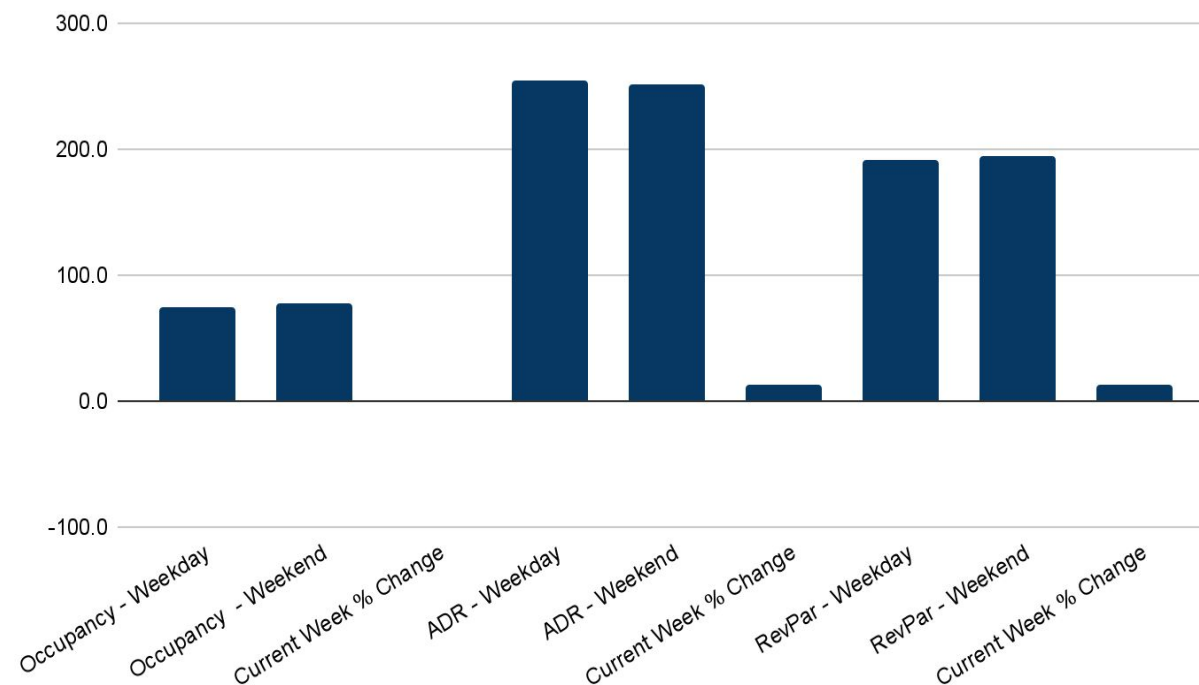
STR Hospitality Summary

STR/BCHA

STR Summary BC & Regions

September 24 - September 30, 2023

- British Columbia had a **75.1%** occupancy from Sunday-Thursday and a **77.5%** occupancy during the weekend, down **0.1%** compared to the same week in 2022
- British Columbia had an ADR of **\$254** from Sunday-Thursday and an ADR of **\$251.1** during the weekend, up **13.6%** compared to the same week in 2022
- British Columbia had a RevPAR of **\$190.8** from Sunday-Thursday and a RevPAR of **\$194.7** during the weekend, up **13.5%** compared to the same week in 2022



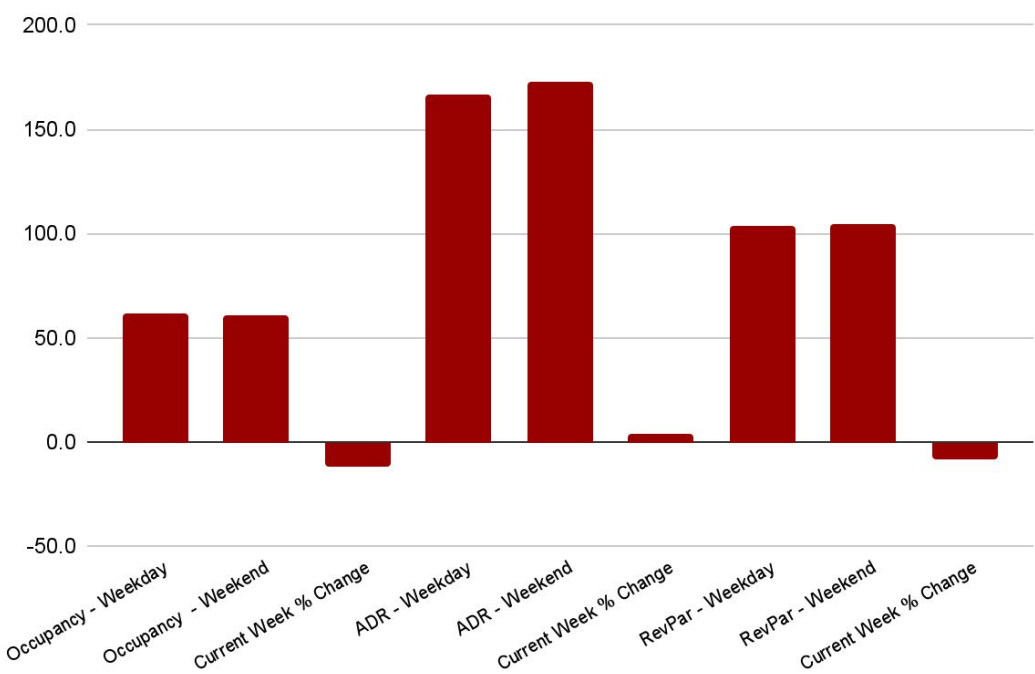
Regional Statistics the Weekend of September 29 - September 30, 2023:

	OCC	ADR	REVPAR
Vancouver	82.2%	\$299.8	\$246.5
Vancouver Island	76.9%	\$271.4	\$208.8
Whistler	65.3%	\$308.9	\$201.6
Thompson Okanagan	80.2%	\$179.9	\$144.2
Northern BC	67.3%	\$139.3	\$93.8
Kootenay Rockies	60.8%	\$172.5	\$104.8
Cariboo Chilcotin Coast	66.7%	\$153.9	\$102.6

Kootenay Rockies Summary

September 24 - September 30, 2023

- The Kootenay Rockies had a **62.1%** occupancy from Sunday - Thursday and a **60.8%** occupancy during the weekend, giving the region the **lowest** percent occupancy in BC
 - Compared to the week of September 25, 2022, occupancy is down **11.6%**
- The Kootenay Rockies had an ADR of **\$166.8** from Sunday - Thursday and an ADR of **\$172.5** during the weekend, giving the region the **third-lowest** ADR in BC
 - Compared to the week of September 25, 2022, ADR is up **3.7%**
- The Kootenay Rockies had a RevPAR of **\$103.7** from Sunday - Thursday and a RevPAR of **\$104.8** during the weekend, giving the region the **third-lowest** RevPAR in BC
 - Compared to the week of September 25, 2022, RevPAR is down **8.3%**



British Columbia:

Weekday (Sunday - Thursday)
Weekend (Friday - Saturday)
Compared to the same week in 2022

	OCC	ADR	REVPAR
Weekday (Sunday - Thursday)	75.1%	\$254	\$190.8
Weekend (Friday - Saturday)	77.5%	\$251.1	\$194.7
Compared to the same week in 2022	-0.1%	13.6%	13.5%



Glossary

- **Occupancy:** Calculated by the number of occupied rooms divided by the number of available rooms that physically exist in a short-term rental.
- **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 short-term rental performance.
- **Revenue per Available Room (RevPAR):** Calculated by multiplying a short-term rental ADR by its occupancy rate, an increase in RevPAR most likely indicates an improvement in occupancy rate and can be used to measure a short-term rental performance.
- **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.

Appendix - Date conversions

Week of - 2022	Week of - 2023
January 3, 2022	January 2, 2023
January 10, 2022	January 9, 2023
January 17, 2022	January 16, 2023
January 24, 2022	January 23, 2023
January 31, 2022	January 30, 2023
February 7, 2022	February 6, 2023
February 14, 2022	February 13, 2023
February 21, 2022	February 20, 2023
February 28, 2022	February 27, 2023
March 7, 2022	March 6, 2023
March 14, 2022	March 13, 2023
March 21, 2022	March 20, 2023
March 28, 2022	March 27, 2023
April 4, 2022	April 3, 2023
April 11, 2022	April 10, 2023
April 18, 2022	April 17, 2023

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January 3, 2022	January 2, 2023
January 10, 2022	January 9, 2023
January 17, 2022	January 16, 2023
January 24, 2022	January 23, 2023
January 31, 2022	January 30, 2023
February 7, 2022	February 6, 2023
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April 4, 2022	April 3, 2023
April 11, 2022	April 10, 2023
April 18, 2022	April 17, 2023

Contact Us

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