

STR and Environics Domestic
VisitorView

Measuring Canadian Travel Patterns

November 1, 2023 Update

2023 Weekly Report



Purpose

- 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 Environics' 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**

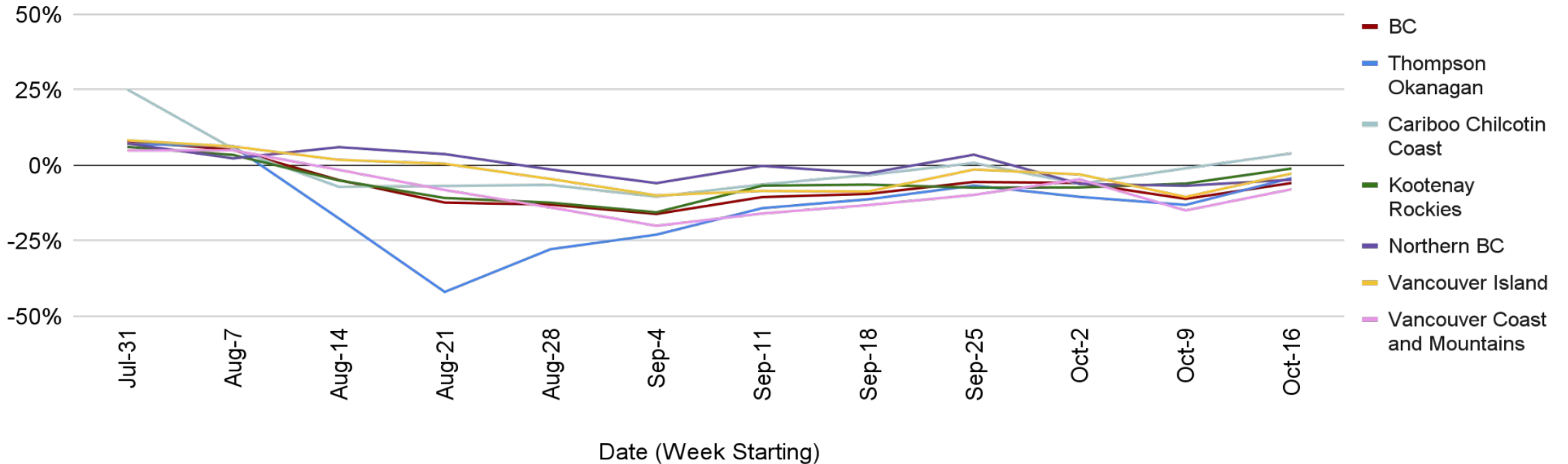




Domestic Overnight Visitors

Environics Canada

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

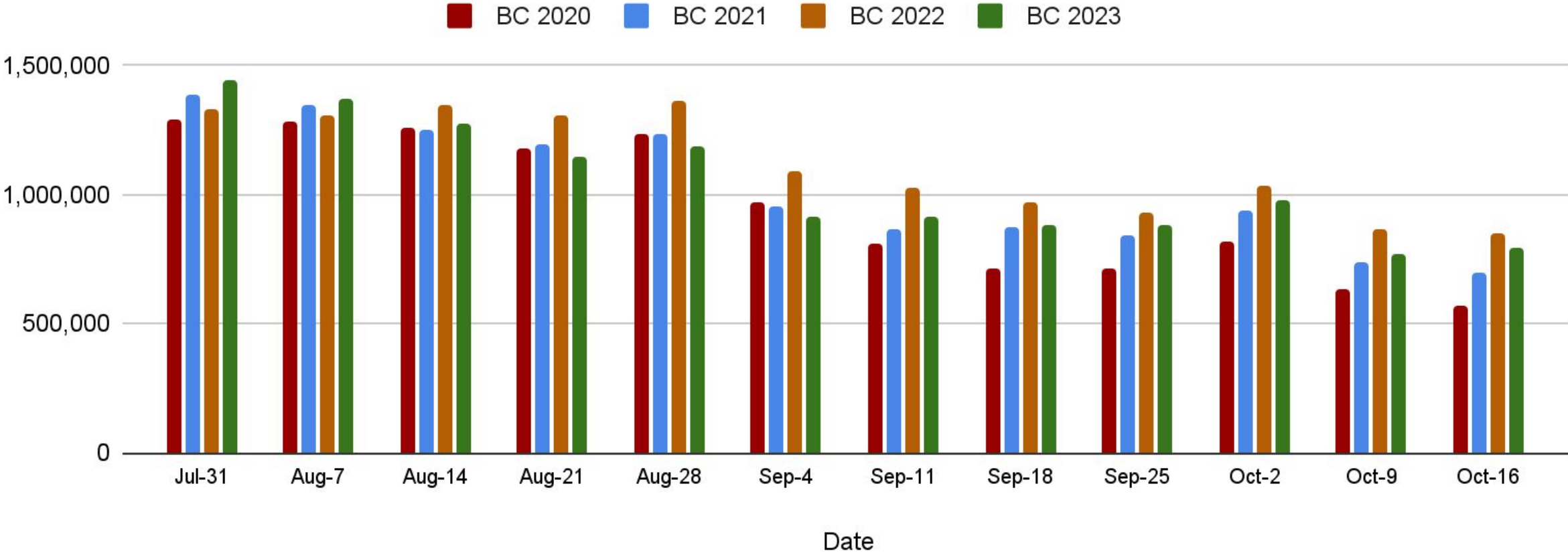


Key Findings

- Average Domestic Overnight Visitation to BC for Week 42 (October 16 - October 22, 2023) is **down 5.9%** compared to the same week in 2022.
- When comparing Week 42 to Week 41 (October 9 - October 15, 2023), all regions except for Cariboo Chilcotin Coast and Kootenay Rockies saw an **increase** in visitation.
- British Columbia **increased 3.1%** when comparing Week 42 to Week 41 (October 9 - October 15, 2023).

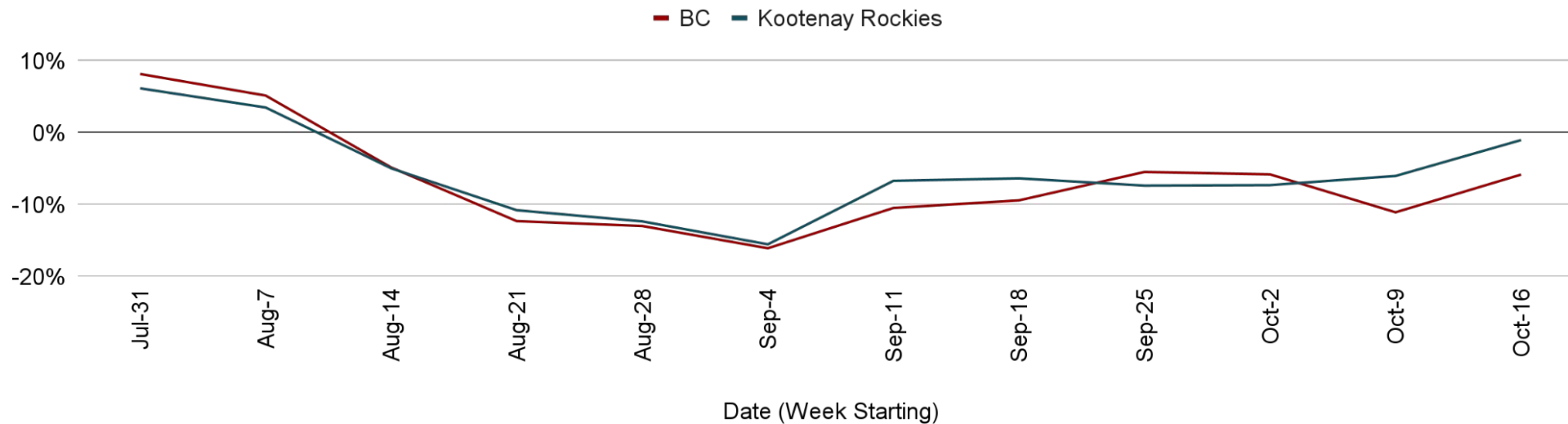
Domestic Overnight Visitors Count - Weekly Year Over Year (2020, 2021, 2022, 2023)

British Columbia



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

Kootenay Rockies



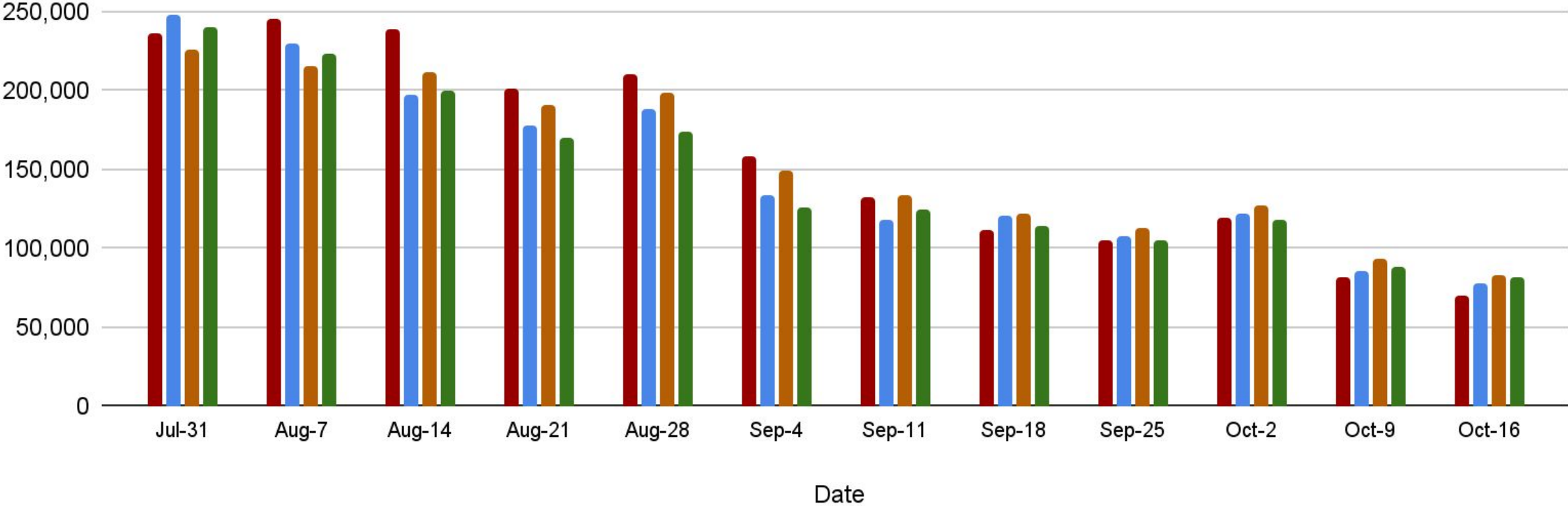
Key Findings

- Domestic Overnight Visitation to the Kootenay Rockies for Week 42 (October 16 - October 22, 2023) was **down 1.1%** compared to the same week in 2022
- Visitation to the Kootenay Rockies **decreased by 7.3%** comparing current week to the previous week
- British Columbia **increased 3.1%** when comparing current week to the previous week
- Year over year Kootenay Rockies saw **4.8% more** visitation when compared to British Columbia

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

Kootenay Rockies

■ KR 2020 ■ KR 2021 ■ KR 2022 ■ KR 2023





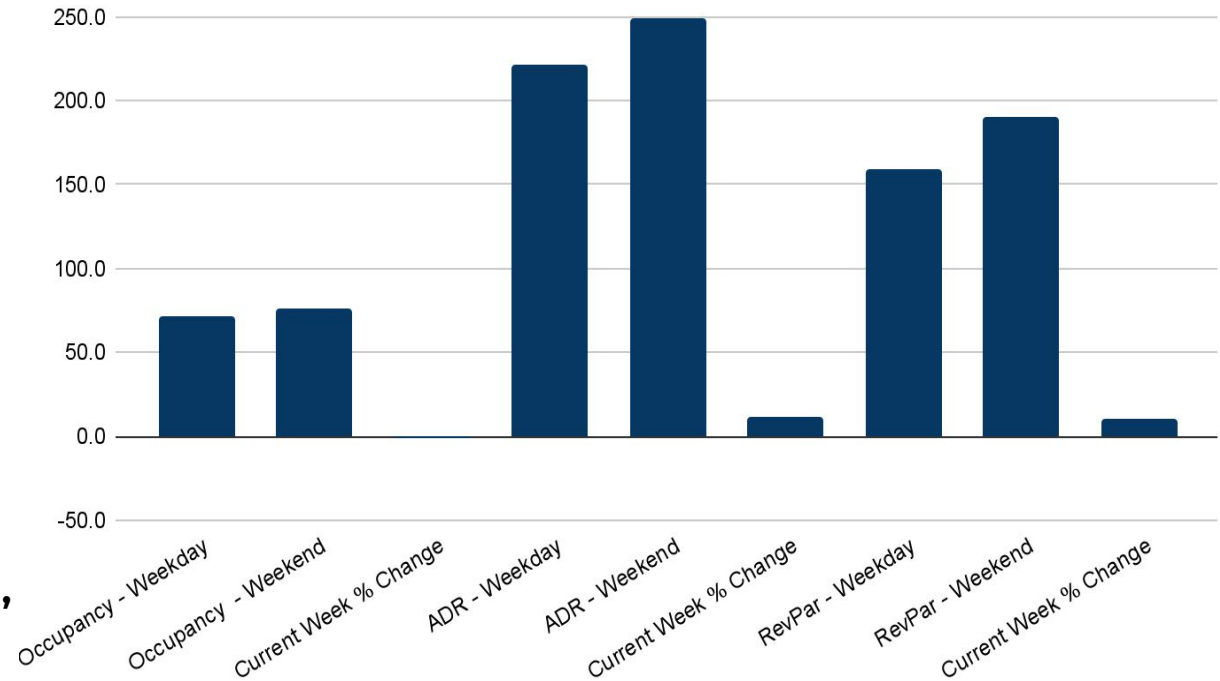
STR Hospitality Summary

STR/BCHA

STR Summary BC & Regions

October 15 - October 21, 2023

- British Columbia had a **72.1%** occupancy from Sunday-Thursday and a **76.3%** occupancy during the weekend, down **1.2%** compared to the same week in 2022
- British Columbia had an ADR of **\$221.3** from Sunday-Thursday and an ADR of **\$249.3** during the weekend, up **11.7%** compared to the same week in 2022
- British Columbia had a RevPAR of **\$159.5** from Sunday-Thursday and a RevPAR of **\$190.3** during the weekend, up **10.3%** compared to the same week in 2022



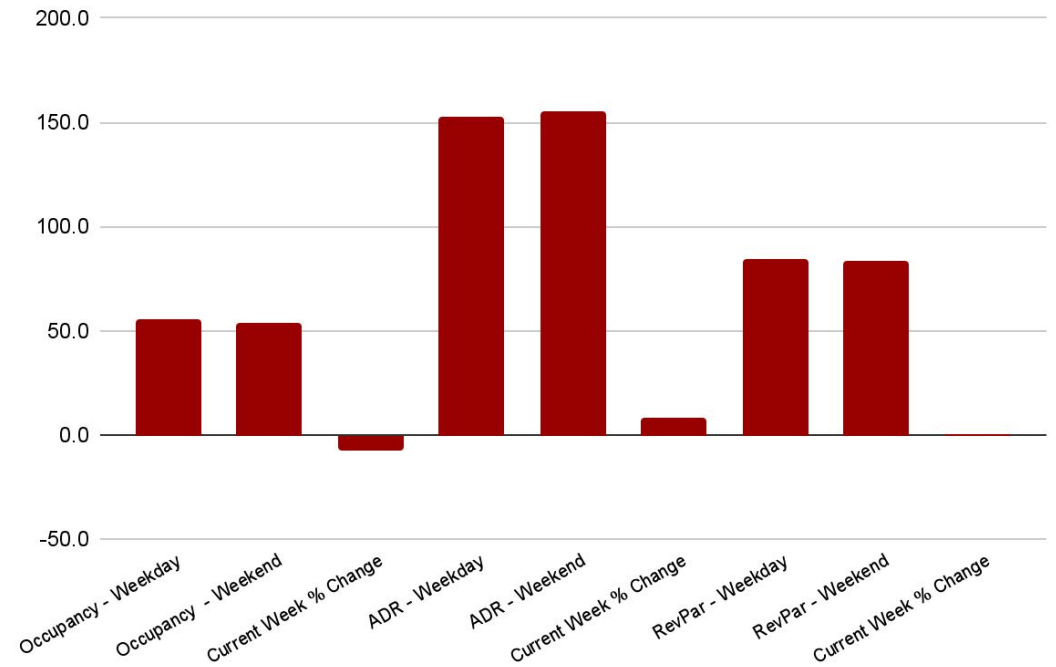
Regional Statistics the Weekend of October 20 - October 21, 2023:

	OCC	ADR	REVPAR
Vancouver	89%	\$315.9	\$281.2
Vancouver Island	74%	\$212.3	\$157
Whistler	61.8%	\$246	\$152.1
Thompson Okanagan	64.7%	\$149.3	\$96.6
Northern BC	63.3%	\$138.6	\$87.8
Kootenay Rockies	53.6%	\$155.6	\$83.4
Cariboo Chilcotin Coast	67.5%	\$148.6	\$100.2

Kootenay Rockies Summary

October 15 - October 21, 2023

- The Kootenay Rockies had a **55.4%** occupancy from Sunday - Thursday and a **53.6%** occupancy during the weekend, giving the region the **second-lowest** percent occupancy in BC
 - Compared to the week of October 16, 2022, occupancy is down **7.6%**
- The Kootenay Rockies had an ADR of **\$152.3** from Sunday - Thursday and an ADR of **\$155.6** during the weekend, giving the region the **fourth-lowest** ADR in BC
 - Compared to the week of October 16, 2022, ADR is up **8.3%**
- The Kootenay Rockies had a RevPAR of **\$84.4** from Sunday - Thursday and a RevPAR of **\$83.4** during the weekend, giving the region the **lowest** RevPAR in BC
 - Compared to the week of October 16, 2022, RevPAR is up **0.1%**



British Columbia:

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

	OCC	ADR	REVPAR
Weekday (Sunday - Thursday)	72.1%	\$221.3	\$159.5
Weekend (Friday - Saturday)	76.3%	\$249.3	\$190.3
Compared to the same week in 2022	-1.2%	11.7%	10.3%



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.

Long **Weekends and Holidays** observed so far:

- New Years Day
- Family Day
- Good Friday
- Victoria Day
- Canada Day
- B.C. Day
- Labour Day
- Truth & Reconciliation day
- Thanksgiving 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.

Appendix 1 - 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

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

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

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

Appendix 2 - Domestic Overnight Visitors

- Weekly Year Over Year (2023 vs. 2022) Variation

Part 1

Week #	Week Of:	British Columbia	Thompson Okanagan	Cariboo Chilcotin Coast	Kootenay Rockies	Northern BC	Vancouver Island	Vancouver Coast and Mountains
1	January 2 - 8	51.6%	36.9%	35.2%	23.7%	49.9%	35.4%	78.4%
2	January 9 - 15	47.0%	21.4%	30.3%	9.1%	38.0%	31.7%	89.6%
3	January 16 - 22	52.2%	24.6%	25.5%	7.6%	48.3%	31.7%	104.6%
4	January 23 - 30	47.3%	17.3%	12.5%	7.1%	42.8%	26.5%	98.6%
5	January 30 - February 5	39.7%	14.9%	14.6%	8.0%	46.4%	22.6%	76.9%
6	February 6 - 12	36.5%	18.0%	9.1%	9.0%	38.6%	15.1%	71.8%
7	February 13 - 19	23.9%	1.6%	3.9%	8.7%	22.1%	6.0%	53.8%
8	February 20 - 26	4.2%	-9.1%	-14.0%	-4.2%	10.2%	-9.8%	20.8%
9	February 27 - March 5	10.0%	-6.2%	-8.7%	0.2%	15.0%	-4.3%	29.5%
10	March 6 - March 12	4.4%	-5.1%	-8.8%	9.9%	15.9%	-4.6%	12.0%
11	March 13 - 19	21.3%	5.5%	1.8%	5.8%	29.8%	7.0%	41.9%
12	March 20 - 26	14.1%	2.3%	6.9%	-2.0%	21.4%	0.7%	29.9%
13	March 27 - April 2	19.4%	4.2%	5.8%	10.4%	21.1%	9.2%	35.6%
14	April 3 - April 9	49.7%	52.8%	49.9%	61.9%	32.8%	38.5%	55.1%
15	April 10 - April 16	-0.1%	-16.8%	-25.0%	-16.8%	23.1%	-13.5%	19.2%
16	April 17 - April 23	15.4%	-0.7%	-2.5%	-6.4%	23.3%	1.7%	33.5%

Appendix 2 - Domestic Overnight Visitors

- Weekly Year Over Year (2023 vs. 2022) Variation

Part 2

Week #	Week Of:	British Columbia	Thompson Okanagan	Cariboo Chilcotin Coast	Kootenay Rockies	Northern BC	Vancouver Island	Vancouver Coast and Mountains
17	April 24 - 30	15.8%	3.0%	-1.6%	4.3%	14.9%	7.3%	27.3%
18	May 1 - May 7	24.4%	9.6%	10.4%	12.3%	26.3%	7.8%	47.3%
19	May 8 - May 14	14.1%	-2.0%	6.6%	0.2%	13.4%	7.1%	28.2%
20	May 15 - May 21	4.1%	-3.1%	-0.3%	6.5%	0.3%	-0.2%	13.7%
21	May 22 - May 28	14.5%	-1.6%	5.3%	6.5%	13.1%	8.0%	33.5%
22	May 29 - June 4	15.8%	3.6%	11.2%	12.0%	9.5%	8.4%	30.9%
23	June 5 - June 11	12.3%	2.3%	3.5%	9.5%	13.9%	-2.1%	28.1%
24	June 12 - June 18	9.3%	-1.1%	6.4%	6.2%	8.0%	-1.7%	23.6%
25	June 19 - June 25	-6.5%	-12.8%	-11.9%	-8.8%	-3.9%	-13.4%	1.7%
26	June 26 - July 2	2.1%	-3.8%	-1.5%	-4.6%	3.3%	-6.6%	15.3%
27	July 3 - July 9	1.7%	-1.3%	3.3%	1.4%	6.0%	0.0%	1.6%
28	July 10 - July 16	0.5%	-1.1%	1.0%	1.1%	9.8%	-0.2%	1.5%
29	July 17 - July 23	-1.2%	-3.0%	-6.2%	-0.4%	-3.2%	-3.2%	1.3%
30	July 24 - July 30	-11.9%	-20.8%	-28.1%	-16.5%	-5.8%	-9.5%	-2.0%
31	July 31 - August 6	8.1%	7.1%	25.2%	6.1%	7.3%	8.3%	5.0%

Appendix 2 - Domestic Overnight Visitors

- Weekly Year Over Year (2023 vs. 2022) Variation

Part 3

Week #	Week Of:	British Columbia	Thompson Okanagan	Cariboo Chilcotin Coast	Kootenay Rockies	Northern BC	Vancouver Island	Vancouver Coast and Mountains
32	August 7 - August 13	5.1%	6.3%	5.5%	3.5%	2.3%	6.3%	5.0%
33	August 14 - August 20	-4.9%	-17.6%	-7.1%	-5.0%	6.0%	1.8%	-1.5%
34	August 21 - August 27	-12.3%	-41.9%	-6.8%	-10.8%	3.7%	0.5%	-8.1%
35	August 28 - September 3	-13.0%	-27.8%	-6.5%	-12.4%	-1.4%	-4.5%	-13.9%
36	September 4 - September 10	-16.1%	-23.0%	-10.4%	-15.5%	-5.9%	-9.9%	-20.0%
37	September 11 - September 17	-10.5%	-14.2%	-6.3%	-6.7%	-0.2%	-8.5%	-15.9%
38	September 18 - September 24	-9.4%	-11.2%	-3.2%	-6.4%	-2.6%	-8.6%	-13.2%
39	September 25 - October 1	-5.5%	-6.7%	0.8%	-7.4%	3.5%	-1.4%	-9.8%
40	October 2 - October 8	-5.8%	-10.4%	-6.1%	-7.3%	-6.1%	-3.0%	-4.6%
41	October 9 - October 15	-11.1%	-13.1%	-1.0%	-6.0%	-6.8%	-10.5%	-14.9%
42	October 16 - October 22	-5.9%	-4.2%	4.0%	-1.1%	-4.7%	-2.7%	-7.9%

Contact Us



SYMPHONY
TOURISM
SERVICES

Robb MacDonald

Managing Director, Symphony Tourism Services

Email: rmacdonald@totabc.com

symphonytourismservices.com