STR and Environics Domestic VisitorView

Measuring Canadian Travel Patterns

August 7, 2024 Update (Week 30)

2024 Weekly Report











Purpose

bcrts

- The Measuring Canadian Travel Patterns report was created to help tourism 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 <u>exact</u> 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 <u>PRIZM</u>, 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 2023, with percentages above 0% indicating higher rates of visitation in 2024 than 2023, and percentages below 0% indicating lower rates of visitation in 2024 than 2023.
- 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 <u>info@str.com</u> to request more information



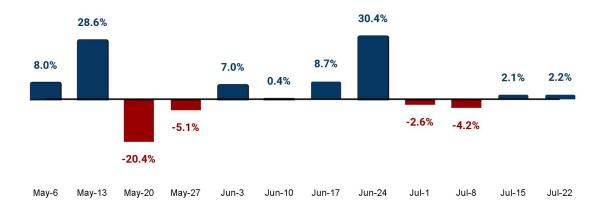


Domestic Overnight Visitors - Weekly BC & Regions

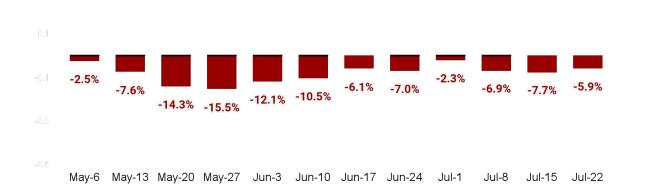
Key Findings

- British Columbia increased 2.2% when comparing Week 30 (July 22 - July 28, 2024) to Week 29 (July 15 - July 21, 2024).
- In Week 30, visitation increased in Thompson Okanagan, Kootenay Rockies, and Vancouver Coast and Mountains regions compared to the previous week.
- Year-over-year Overnight Visitation to BC for Week 30 is down 5.9% compared to the same week in 2023.

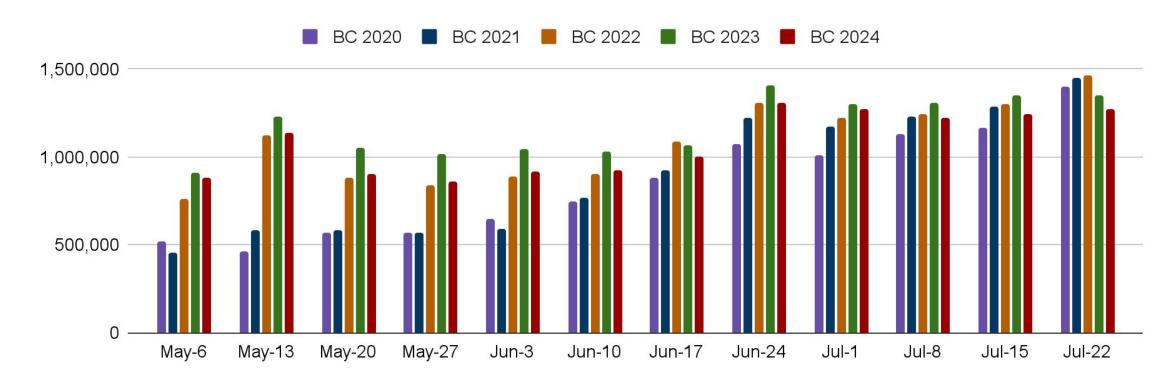
Week-over-Week (%)



Year-over-Year (%)



Domestic Overnight Visitors - Weekly BC & Regions



Thompson Okanagan Region

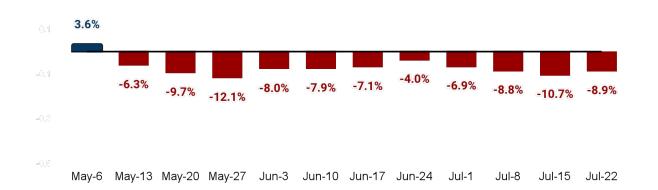
Key Findings

- Visitation to Thompson Okanagan increased by 0.1% comparing current week to the previous week.
- Year-over-year Overnight Visitation to Thompson Okanagan for Week 30 (July 22 -July 28, 2024) was down 8.9% compared to the same week in 2023.
- Year-over-year, Thompson Okanagan saw a change in visitation more pronounced than BC.

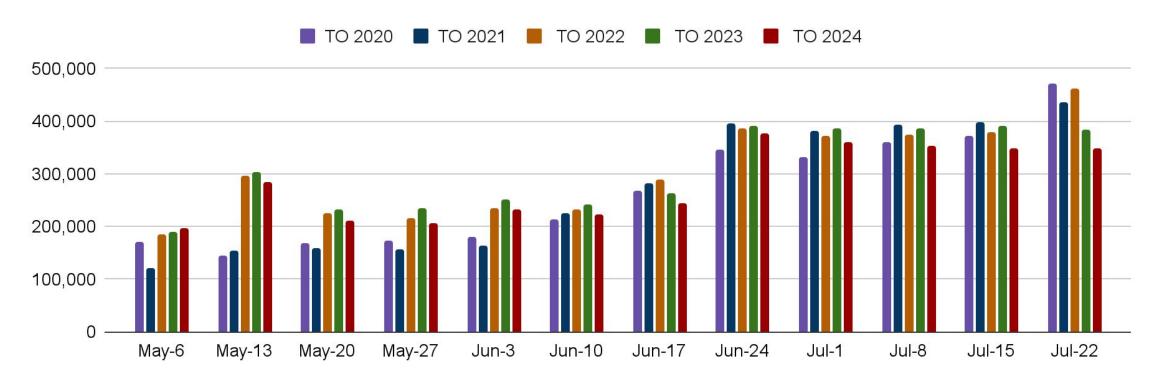
Week-over-Week (%)



Year-over-Year (%)



Thompson Okanagan Region



Cariboo Chilcotin Coast Region

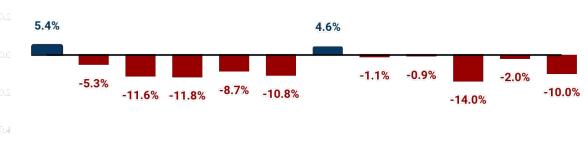
Key Findings

- Visitation to Cariboo Chilcotin Coast decreased by 9.6% comparing current week to previous week.
- Year-over-year Overnight Visitation to Cariboo Chilcotin Coast for Week 30 (July 22 - July 28, 2024) was down 10% compared to same week in 2023.
- Year-over-year, Cariboo Chilcotin Coast saw a change in visitation more pronounced than BC.

Week-over-Week (%)

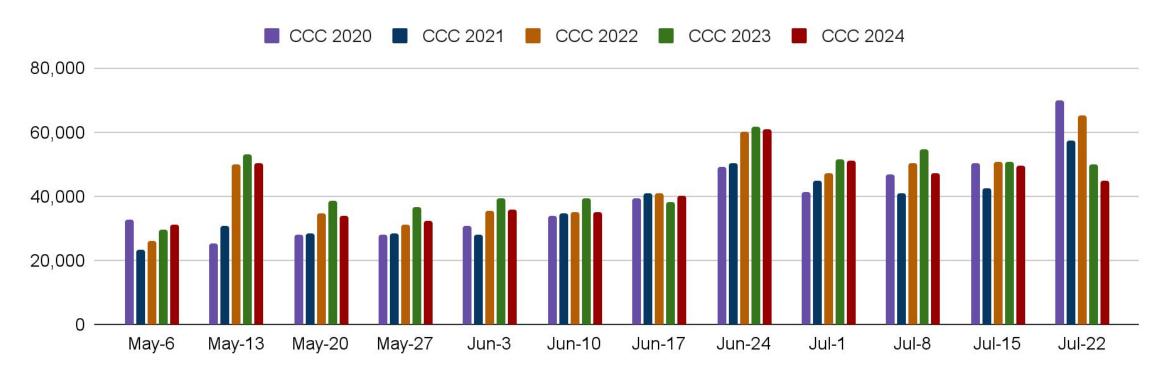


Year-over-Year (%)



May-6 May-13 May-20 May-27 Jun-3 Jun-10 Jun-17 Jun-24 Jul-1 Jul-8 Jul-15 Jul-22

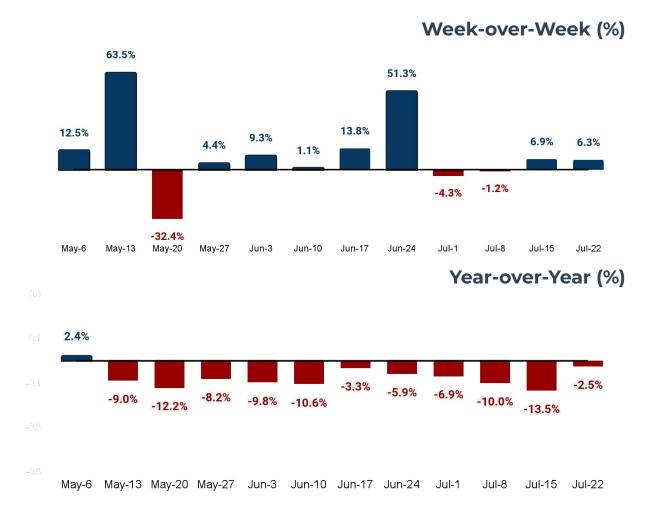
Cariboo Chilcotin Coast Region



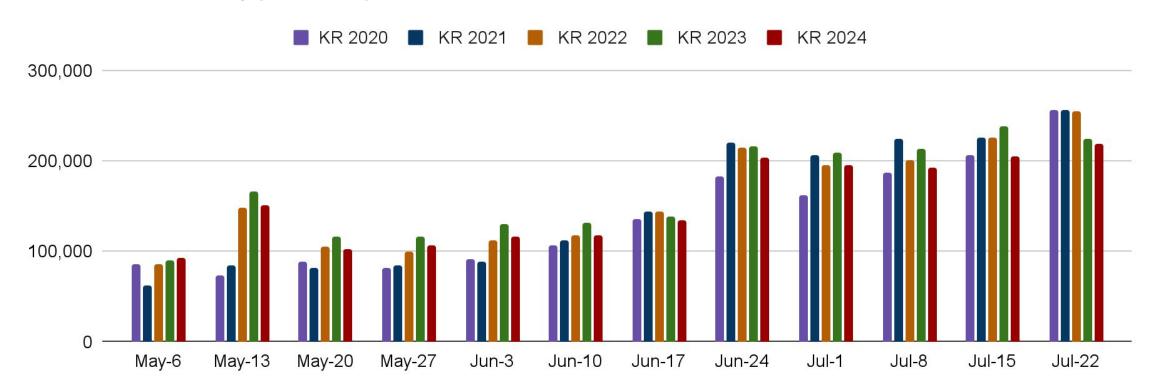
Kootenay Rockies Region

Key Findings

- Visitation to Kootenay Rockies increased by
 6.3% comparing current week to the previous week.
- Year-over-year Overnight Visitation to Kootenay Rockies for Week 30 (July 22 - July 28, 2024) was down 2.5% compared to the same week in 2023.
- Year-over-year, Kootenay Rockies saw a change in visitation less pronounced than BC.



Kootenay Rockies Region

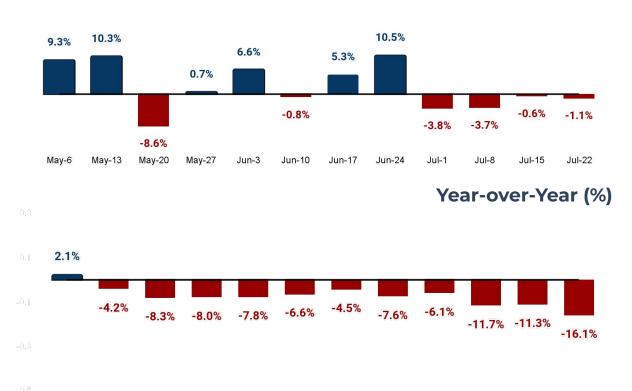


Northern BC Region

Week-over-Week (%)

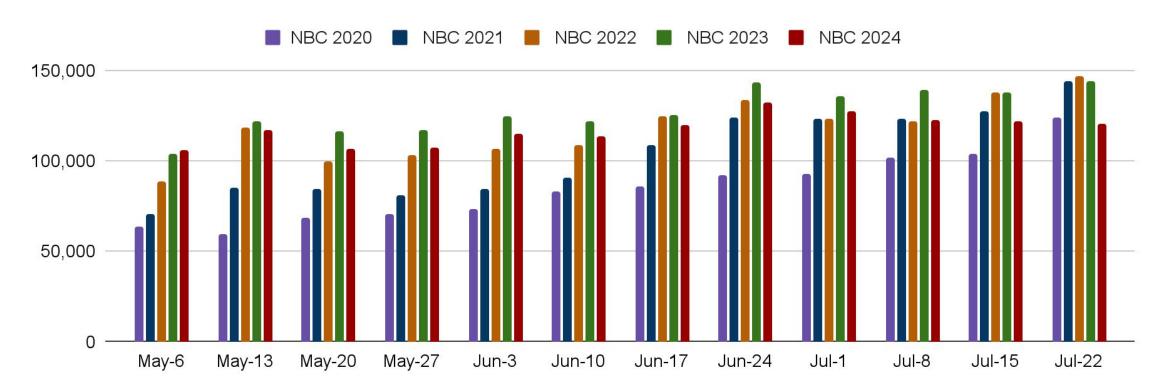
Key Findings

- Visitation to Northern BC **decreased by 1.1%** comparing current week to the previous week.
- Year-over-year Overnight Visitation to Northern BC for Week 30 (July 22 - July 28, 2024) was down 16.1% compared to the same week in 2023.
- Year-over-year, Northern BC saw a change in visitation **more** pronounced than BC.



May-6 May-13 May-20 May-27 Jun-3 Jun-10 Jun-17 Jun-24 Jul-1

Northern BC Region

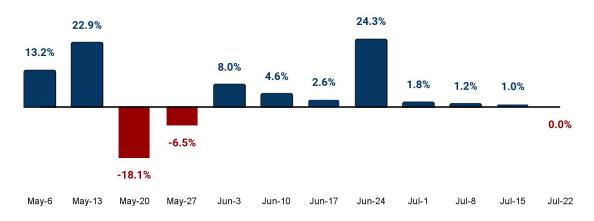


Vancouver Island Region

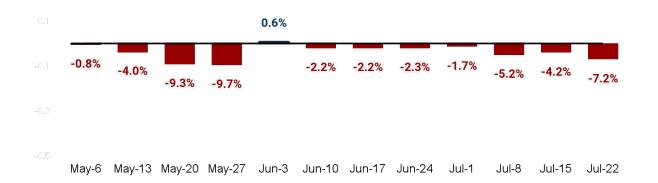
Key Findings

- Visitation to Vancouver Island unchanged at 0% comparing current week to the previous week.
- Year-over-year Overnight Visitation to Vancouver Island for Week 30 (July 22 - July 28, 2024) was down 7.2% compared to the same week in 2023.
- Year-over-year, Vancouver Island saw a change in visitation **more** pronounced than BC.

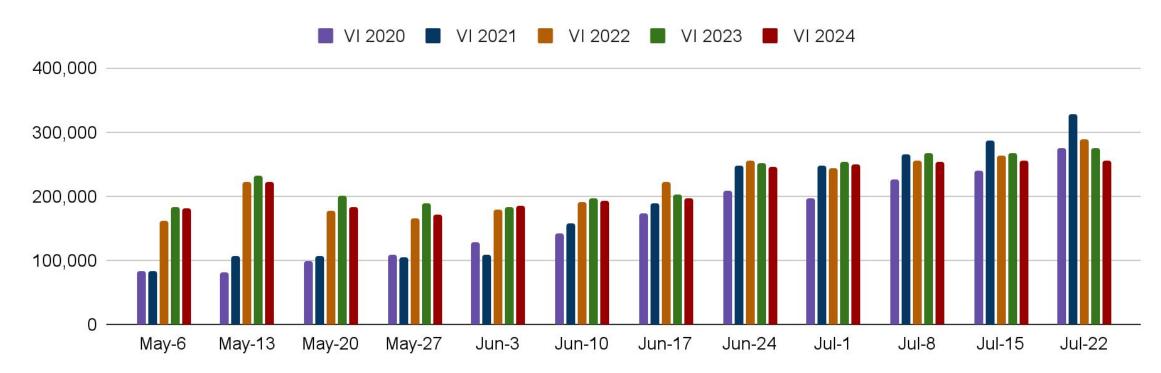
Week-over-Week (%)



Year-over-Year (%)



Vancouver Island Region

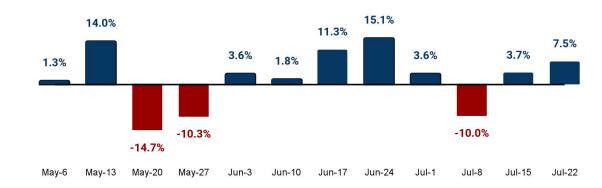


Vancouver, Coast & Mountains Region

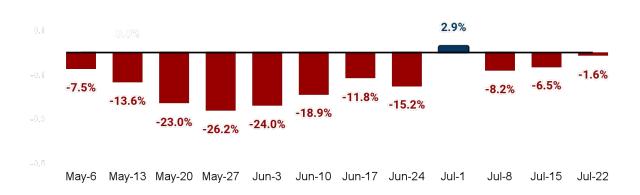
Week-over-Week (%)

Key Findings

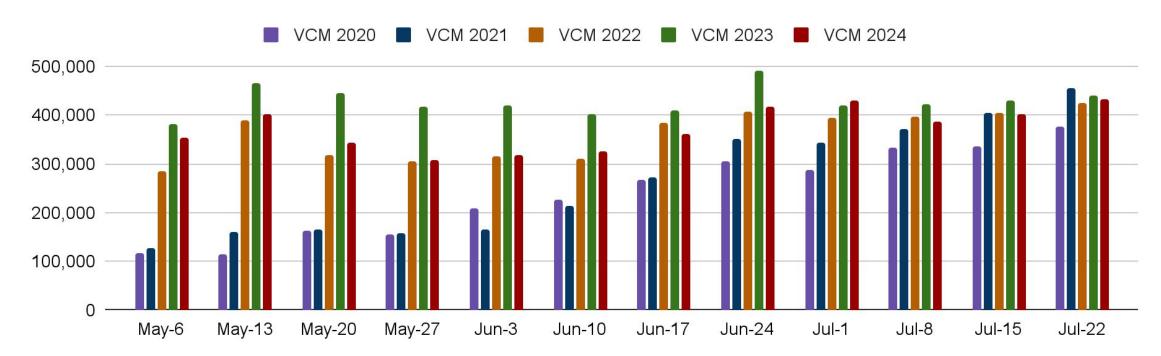
- Visitation to Vancouver, Coast & Mountains increased by 7.5% comparing current week to the previous week.
- Year-over-year Overnight Visitation to Vancouver, Coast & Mountains for Week 30 (July 22 - July 28, 2024) was down 1.6% compared to the same week in 2023.
- Year-over-year, Vancouver, Coast & Mountains saw a change in visitation less pronounced than BC.



Year-over-Year (%)



Vancouver, Coast & Mountains Region





STR Summary BC & Regions

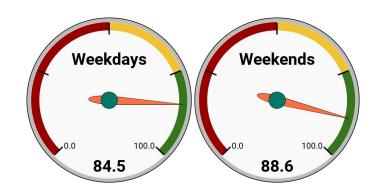
July 21 - July 27, 2024

- British Columbia had a 84.5% Occupancy from Sunday-Thursday and a 88.6% Occupancy during the weekend, up 1% compared to the same week in 2023.
- British Columbia had an ADR of \$304.7 from Sunday-Thursday and an ADR of \$343.2 during the weekend, up 4.1% compared to the same week in 2023.
- British Columbia had a RevPAR of \$257.5 from Sunday-Thursday and a RevPAR of \$304.2 during the weekend, up 5.1% compared to the same week in 2023.

Regional Statistics the Weekend of July 26 - July 27, 2024:

	осс	ADR	REVPAR	
Vancouver	95.2%	\$407.3	\$387.6	
Vancouver Island	93.5%	\$367.6	\$343.6	
Whistler	87.8%	\$434.8	\$381.6	
Thompson Okanagan	82.4%	\$252.4	\$208	
Northern BC	70.7%	\$143.6	\$101.6	
Kootenay Rockies	82.5%	\$226.4	\$186.8	
Cariboo Chilcotin Coast	68.2%	\$155.6	\$106.2	

Average Occupancy











Cariboo Chilcotin Coast Summary

July 21 - July 27, 2024

- Cariboo Chilcotin Coast had a 84.6% Occupancy from Sunday Thursday and a 68.2% Occupancy during the weekend, giving the
 region the fourth-highest percent Occupancy in BC.
 - Compared to the week of July 22, 2023, Occupancy is down 1.8%
- Cariboo Chilcotin Coast had an ADR of \$159.3 from Sunday Thursday and an ADR of \$155.6 during the weekend, giving the region the second-lowest ADR in BC.
 - Compared to the week of July 22, 2023, ADR is down 4.5%
- Cariboo Chilcotin Coast had a RevPAR of \$134.8 from Sunday Thursday and a RevPAR of \$106.2 during the weekend, giving the region the second-lowest RevPAR in BC.
 - Compared to the week of July 22, 2023, RevPAR is down 6.3%

British Columbia:

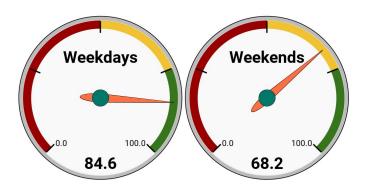
Weekday (Sunday - Thursday)

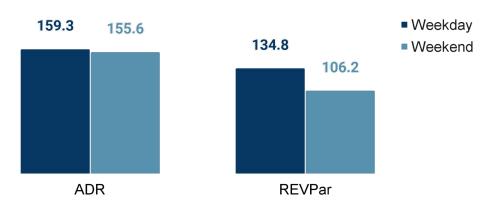
Weekend (Friday - Saturday)

Compared to the same week in 2023

осс	ADR	REVPAR
84.5%	\$304.7	\$257.5
88.6%	\$343.2	\$304.2
1%	4.1%	5.1%

Average Occupancy













Kootenay Rockies Summary

July 21 - July 27, 2024

- Kootenay Rockies had a 78.4% Occupancy from Sunday Thursday and a 82.5% Occupancy during the weekend, giving the region the third-lowest percent Occupancy in BC.
 - Compared to the week of July 22, 2023, Occupancy is up 5%
- Kootenay Rockies had an ADR of \$215.9 from Sunday Thursday and an ADR of \$226.4 during the weekend, giving the region the third-lowest ADR in BC.
 - Compared to the week of July 22, 2023, ADR is down 0.1%
- Kootenay Rockies had a RevPAR of \$169.2 from Sunday Thursday and a RevPAR of \$186.8 during the weekend, giving the region the third-lowest RevPAR in BC.
 - Compared to the week of July 22, 2023, RevPAR is up 4.9%

British Columbia:

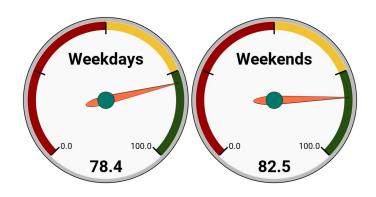
Weekday (Sunday - Thursday)

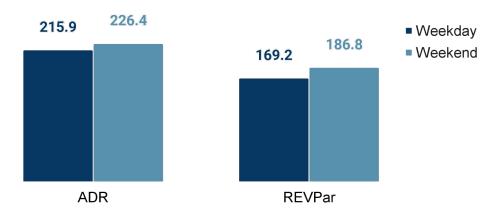
Weekend (Friday - Saturday)

Compared to the same week in 2023

осс	ADR	REVPAR
84.5%	\$304.7	\$257.5
88.6%	\$343.2	\$304.2
1%	4.1%	5.1%

Average Occupancy













Northern BC Summary

July 21 - July 27, 2024

- Northern BC had a 74.2% Occupancy from Sunday Thursday and a 70.7% Occupancy during the weekend, giving the region the lowest percent Occupancy in BC.
 - Compared to the week of July 22, 2023, Occupancy is down 4.3%
- Northern BC had an ADR of \$145.7 from Sunday Thursday and an ADR of \$143.6 during the weekend, giving the region the lowest ADR in BC.
 - o Compared to the week of July 22, 2023, ADR is up 2.3%
- Northern BC had a RevPAR of **\$108.1** from Sunday Thursday and a RevPAR of **\$101.6** during the weekend, giving the region the **lowest** RevPAR in BC.
 - o Compared to the week of July 22, 2023, RevPAR is down 2.1%

British Columbia:

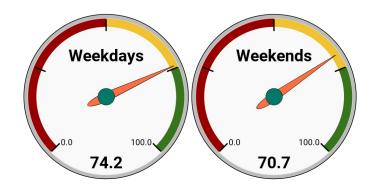
Weekday (Sunday - Thursday)

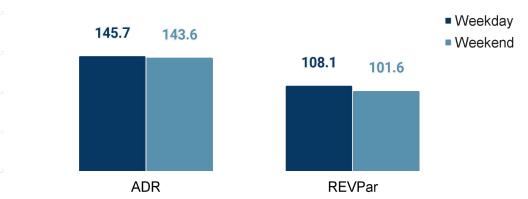
Weekend (Friday - Saturday)

Compared to the same week in 2023

осс	ADR	REVPAR
84.5%	\$304.7	\$257.5
88.6%	\$343.2	\$304.2
1%	4.1%	5.1%

Average Occupancy













Thompson Okanagan Summary

July 21 - July 27, 2024

- Thompson Okanagan had a **77.8%** Occupancy from Sunday Thursday and a **82.4%** Occupancy during the weekend, giving the region the **second-lowest** percent Occupancy in BC.
 - o Compared to the week of July 22, 2023, Occupancy is up 0.1%
- Thompson Okanagan had an ADR of **\$226.4** from Sunday Thursday and an ADR of **\$252.4** during the weekend, giving the region the **fourth-highest** ADR in BC.
 - o Compared to the week of July 22, 2023, ADR is up **3.7%**
- Thompson Okanagan had a RevPAR of **\$176.2** from Sunday Thursday and a RevPAR of **\$208** during the weekend, giving the region the **fourth-highest** RevPAR in BC.
 - o Compared to the week of July 22, 2023, RevPAR is up 3.8%

British Columbia:

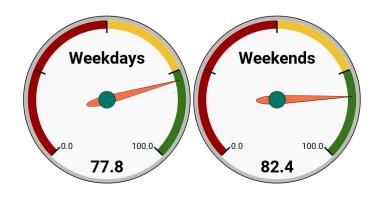
Weekday (Sunday - Thursday)

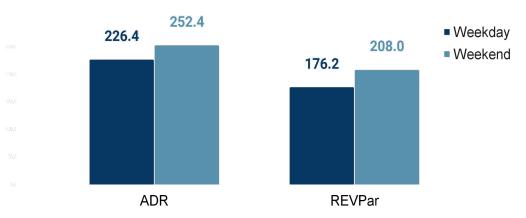
Weekend (Friday - Saturday)

Compared to the same week in 2023

осс	ADR	REVPAR
84.5%	\$304.7	\$257.5
88.6%	\$343.2	\$304.2
1%	4.1%	5.1%

Average Occupancy













Whistler Summary

July 21 - July 27, 2024

- Whistler had a **81.7%** Occupancy from Sunday Thursday and a **87.8%** Occupancy during the weekend, giving the region the **third-highest** percent Occupancy in BC.
 - o Compared to the week of July 22, 2023, Occupancy is up **3.2%**
- Whistler had an ADR of \$368.5 from Sunday Thursday and an ADR of \$434.8 during the weekend, giving the region the highest ADR in BC.
 - Compared to the week of July 22, 2023, ADR is up 3.6%
- Whistler had a RevPAR of \$300.9 from Sunday Thursday and a RevPAR of \$381.6 during the weekend, giving the region the second-highest RevPAR in BC.
 - Compared to the week of July 22, 2023, RevPAR is up 6.9%

British Columbia:

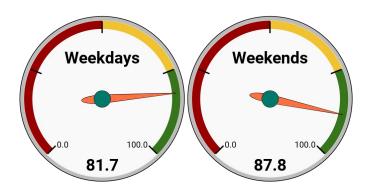
Weekday (Sunday - Thursday)

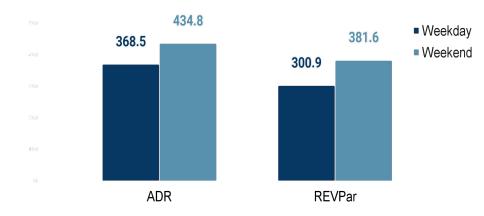
Weekend (Friday - Saturday)

Compared to the same week in 2023

осс	ADR	REVPAR
84.5%	\$304.7	\$257.5
88.6%	\$343.2	\$304.2
1%	4.1%	5.1%

Average Occupancy













Vancouver Island Summary

July 21 - July 27, 2024

- Vancouver Island had a 85.8% Occupancy from Sunday Thursday and a 93.5% Occupancy during the weekend, giving the region the second-highest percent Occupancy in BC.
 - o Compared to the week of July 22, 2023, Occupancy is up 6.8%
- Vancouver Island had an ADR of \$352 from Sunday Thursday and an ADR of \$367.6 during the weekend, giving the region the third-highest ADR in BC.
 - o Compared to the week of July 22, 2023, ADR is up 7.7%
- Vancouver Island had a RevPAR of \$301.9 from Sunday Thursday and a RevPAR of \$343.6 during the weekend, giving the region the third-highest RevPAR in BC.
 - Compared to the week of July 22, 2023, RevPAR is up 14.9%

British Columbia:

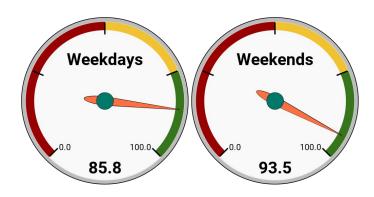
Weekday (Sunday - Thursday)

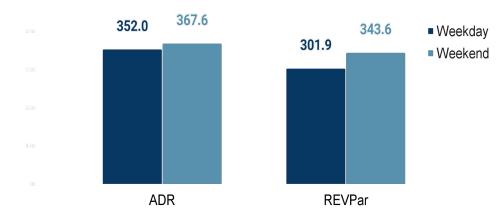
Weekend (Friday - Saturday)

Compared to the same week in 2023

осс	ADR	REVPAR
84.5%	\$304.7	\$257.5
88.6%	\$343.2	\$304.2
1%	4.1%	5.1%

Average Occupancy













Vancouver Summary

July 21 - July 27, 2024

- Vancouver had a 90% Occupancy from Sunday Thursday and a 95.2%
 Occupancy during the weekend, giving the region the highest percent Occupancy in BC.
 - Compared to the week of July 22, 2023, Occupancy is up 0.3%
- Vancouver had an ADR of \$356.4 from Sunday Thursday and an ADR of \$407.3 during the weekend, giving the region the second-highest ADR in BC.
 - o Compared to the week of July 22, 2023, ADR is up 3%
- Vancouver had a RevPAR of \$320.8 from Sunday Thursday and a RevPAR of \$387.6 during the weekend, giving the region the highest RevPAR in BC.
 - Compared to the week of July 22, 2023, RevPAR is up 3.4%

British Columbia:

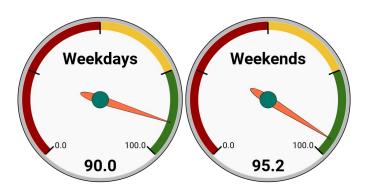
Weekday (Sunday - Thursday)

Weekend (Friday - Saturday)

Compared to the same week in 2023

осс	ADR	REVPAR
84.5%	\$304.7	\$257.5
88.6%	\$343.2	\$304.2
1%	4.1%	5.1%

Average Occupancy













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.



Notes

Long Weekends and Holidays:

- New Years Day
- Family Day
- Good Friday
- Victoria Day
- Canada Day
- B.C. Day

- Labour Day
- Truth & Reconciliation Day
- Thanksgiving Day
- Remembrance Day
- Christmas Day

Notes:

- The baseline of comparison is 2023, with percentages above 0% indicating higher rates of visitation in 2024 than 2023, and percentages below 0% indicating lower rates of visitation in 2024 than 2023.
- 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 7 in 2023 (week of April 3) and March in 2024 (week of
 March 25), this created a leap/fall when comparing year over year.



Appendix - Date conversions

	Week of - 2023	Week of - 2024
New Years Day	January 2, 2023 (Week 1)	January 1, 2024 (Week 1)
Family Day	February 20, 2023 (Week 8)	February 19, 2024 (Week 8)
Good Friday	April 7, 2023 (Week 14)	March 29, 2024 (Week 13)
Victoria Day	May 22, 2023 (Week 21)	May 20,2024 (Week 21)
Canada Day	July 1, 2023 (Week 27)	July 1,2024 (Week 27)
B.C. Day		
Labour Day		
Truth & Reconciliation Day		
Thanksgiving Day		
Remembrance Day		
Christmas Day		

Appendix 2 - Domestic Overnight Visitors

Weekly Year Over Year (2024 vs. 2023) Variation - Part 1

Week #	Week Of:	British Columbia	Thompson Okanagan	Cariboo Chilcotin Coast	Kootenay Rockies	Northern BC	Vancouver Island	Vancouver Coast and Mountains
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%
43	October 23 - October 29	-7.4%	-7.0%	-3.0%	-7.5%	-6.8%	-1.9%	-10.3%
44	October 30 - November 5	-12.9%	-8.1%	-8.2%	-6.8%	-5.6%	-9.2%	-25.5%
45	November 6 - November 12	-4.0%	-1.0%	-4.6%	-0.8%	-1.6%	1.4%	-11.3%
46	November 13 - November 19	-12.8%	-9.9%	-3.3%	-0.2%	-11.9%	-5.0%	-21.5%
47	November 20 - November 26	-10.7%	-7.5%	3.9%	-5.6%	-9.1%	-3.7%	-18.7%
48	November 27 - December 3	-10.7%	-5.6%	0.8%	-10.0%	-9.4%	0.2%	-19.0%
49	December 4 - December 10	-18.9%	-13.9%	-8.8%	-7.7%	-15.0%	-11.0%	-27.7%
50	December 11 - December 17	-19.5%	-13.7%	-10.2%	-10.8%	-15.6%	-13.2%	-29.5%
51	December 18 - December 24	-6.8%	-2.7%	5.0%	-2.3%	-0.1%	1.1%	-17.1%
52	December 25 - December 31	-4.7%	1.1%	5.5%	-3.7%	-11.6%	6.8%	-15.5%



Appendix 2 - Domestic Overnight Visitors

Weekly Year Over Year (2024 vs. 2023) Variation - Part 2

Week#	Week Of:	British Columbia	Thompson Okanagan	Cariboo Chilcotin Coast	Kootenay Rockies	Northern BC	Vancouver Island	Vancouver Coast and Mountains
1	January 1 - January 7	-10.7%	-6.8%	4.5%	-8.4%	-20.3%	4.6%	-18.6%
2	January 8 - January 14	-21.5%	-17.9%	-15.7%	-26.1%	-23.2%	-14.5%	-26.0%
3	January 15 - January 21	-24.5%	-20.7%	-10.5%	-13.7%	-19.1%	-21.9%	-32.6%
4	January 22 - January 28	-18.6%	-13.0%	-2.7%	-5.8%	-17.8%	-16.5%	-26.6%
5	January 29 - February 4	-18.2%	-14.0%	-5.7%	-9.7%	-15.6%	-11.4%	-27.3%
6	February 5 - February 11	-13.6%	-11.9%	7.3%	-11.6%	-17.3%	-2.8%	-21.3%
7	February 12 - February 18	-13.8%	-9.3%	-1.9%	-12.4%	-14.6%	-5.6%	-22.0%
8	February 19 - February 25	-9.7%	-7.1%	16.0%	-8.5%	-15.0%	1.4%	-16.6%
9	February 26 - March 3	-12.0%	-8.4%	4.3%	-9.7%	-17.8%	-3.2%	-17.5%
10	March 4 - March 10	-16.4%	-17.0%	-7.1%	-17.7%	-20.3%	-15.7%	-17.8%
11	March 11 - March 17	-21.3%	-22.9%	-10.0%	-17.7%	-17.8%	-18.1%	-25.7%
12	March 18 - March 24	-13.2%	-13.0%	0.4%	-14.8%	-10.6%	-4.4%	-19.1%
13	March 25 - March 31	6.0%	20.2%	38.3%	16.4%	-6.9%	19.6%	-8.0%
14	April 1 - April 7	-28.4%	-34.9%	-22.6%	-32.4%	-19.1%	-28.4%	-27.2%
15	April 8 - April 14	-17.7%	-18.3%	-2.2%	-14.1%	-17.7%	-12.6%	-23.1%
16	April 15 - April 21	-10.7%	-12.2%	2.6%	-2.7%	-12.8%	-4.8%	-15.0%



Appendix 2 - Domestic Overnight Visitors

Weekly Year Over Year (2024 vs. 2023) Variation - Part 3

Week#	Week Of:	British Columbia	Thompson Okanagan	Cariboo Chilcotin Coast	Kootenay Rockies	Northern BC	Vancouver Island	Vancouver Coast and Mountains
17	April 22 - April 28	-7.2%	-7.0%	3.2%	-6.4%	-0.6%	-2.0%	-12.2%
18	April 29 - May 5	-13.1%	-12.4%	-2.8%	-9.7%	-10.6%	-12.0%	-17.5%
19	May 6 - May 12	-2.5%	3.6%	5.4%	2.4%	2.1%	-0.8%	-7.5%
20	May 13 - May 19	-7.6%	-6.3%	-5.3%	-9.0%	-4.2%	-4.0%	-13.6%
21	May 20 - May 26	-14.3%	-9.7%	-11.6%	-12.2%	-8.3%	-9.3%	-23.0%
22	May 27 - June 2	-15.5%	-12.1%	-11.8%	-8.2%	-8.0%	-9.7%	-26.2%
23	June 3 - June 9	-12.1%	-8.0%	-8.7%	-9.8%	-7.8%	0.6%	-24.0%
24	June 10 - June 16	-10.5%	-7.9%	-10.8%	-10.6%	-6.6%	-2.2%	-18.9%
25	June 17 - June 23	-6.1%	-7.1%	4.6%	-3.3%	-4.5%	-2.2%	-11.8%
26	June 24 - June 30	-7.0%	-4.0%	-1.1%	-5.9%	-7.6%	-2.3%	-15.2%
27	July 1 - July 7	-2.3%	-6.9%	-0.9%	-6.9%	-6.1%	-1.7%	2.9%
28	July 8 - July 14	-6.9%	-8.8%	-14.0%	-10.0%	-11.7%	-5.2%	-8.2%
29	July 15 - July 21	-7.7%	-10.7%	-2.0%	-13.5%	-11.3%	-4.2%	-6.5%
30	July 22 - July 28	-5.9%	-8.9%	-10.0%	-2.5%	-16.1%	-7.2%	-1.6%





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