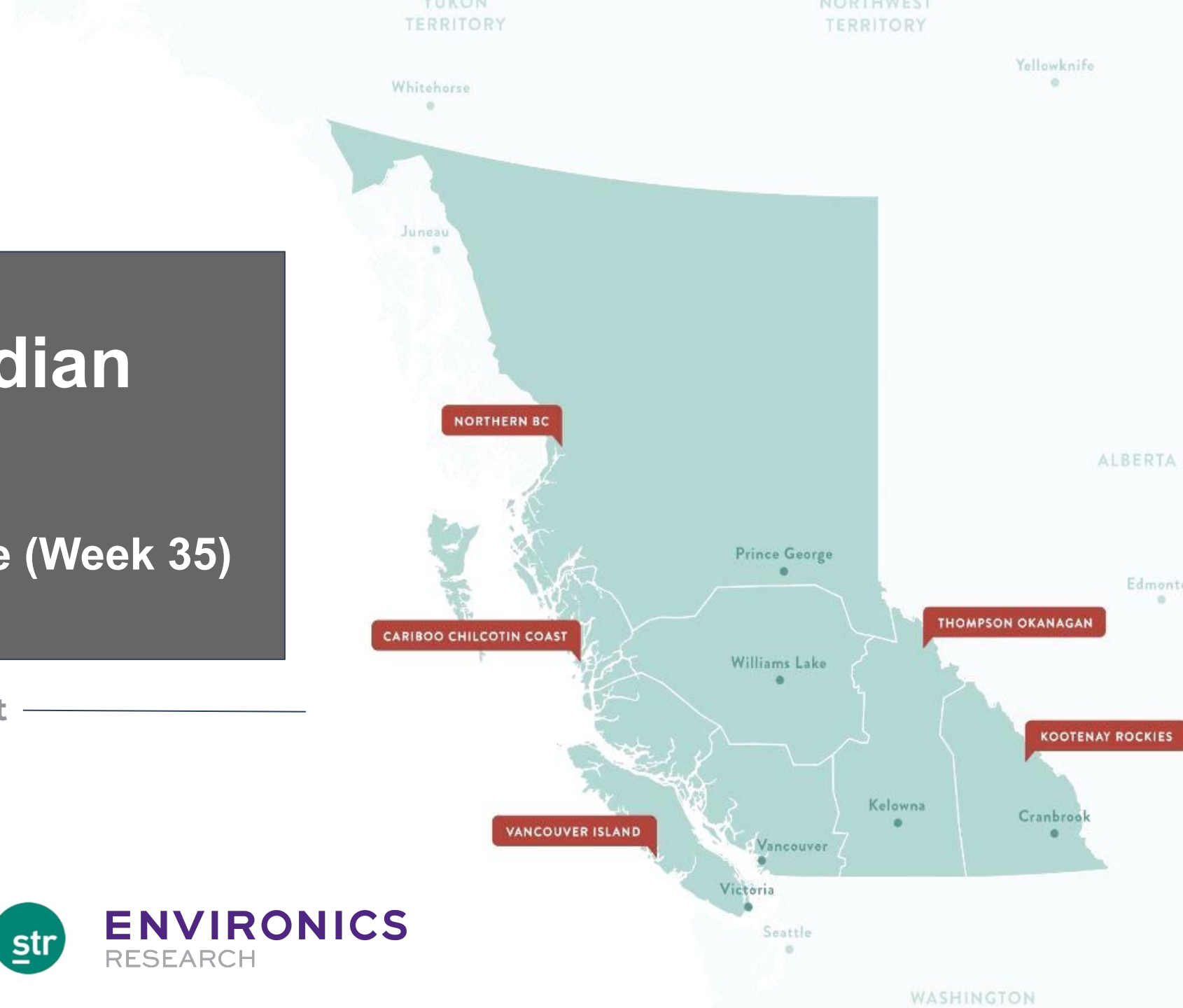


STR and Environics Domestic
VisitorView

Measuring Canadian Travel Patterns

September 11, 2024 Update (Week 35)

2024 Weekly Report



Purpose

- 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**.





MacMillan Provincial Park, Vancouver Island
Credit: Destination BC/ Sean Scott



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 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.

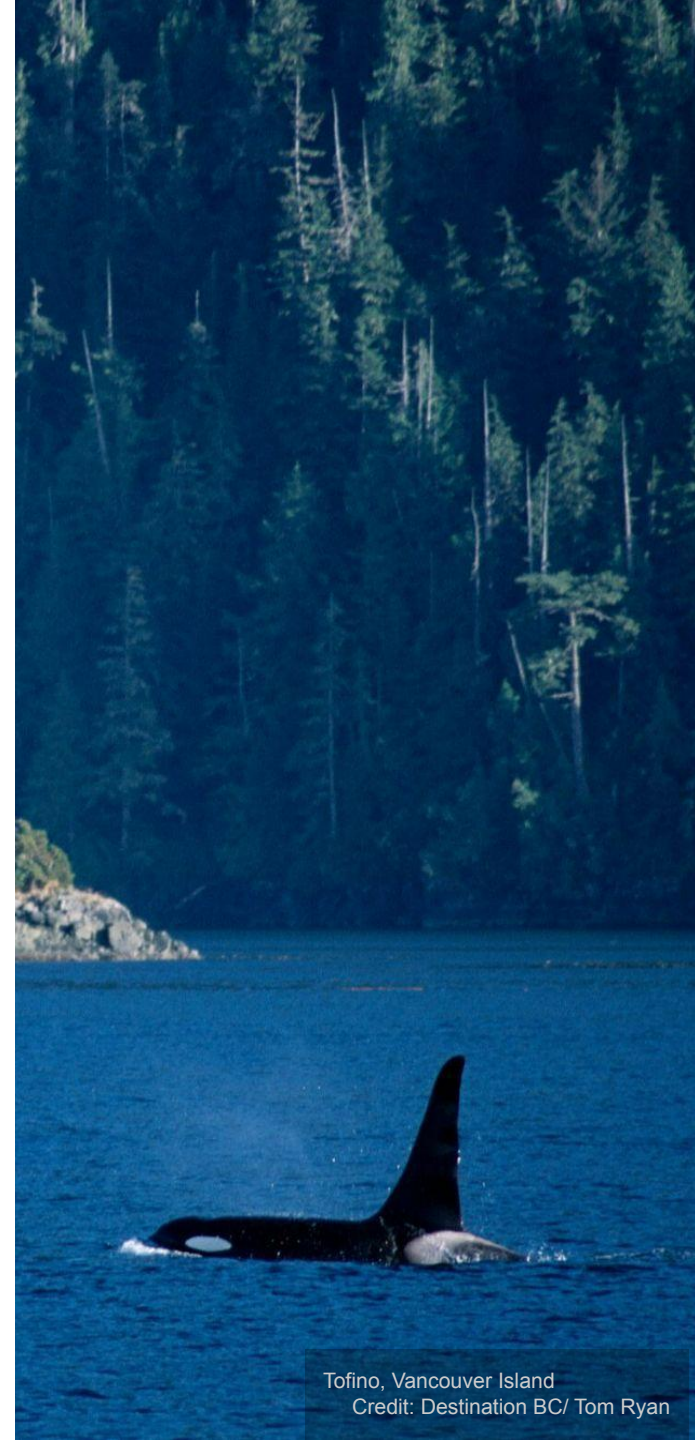
STR Methodology

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





Domestic Overnight Visitors

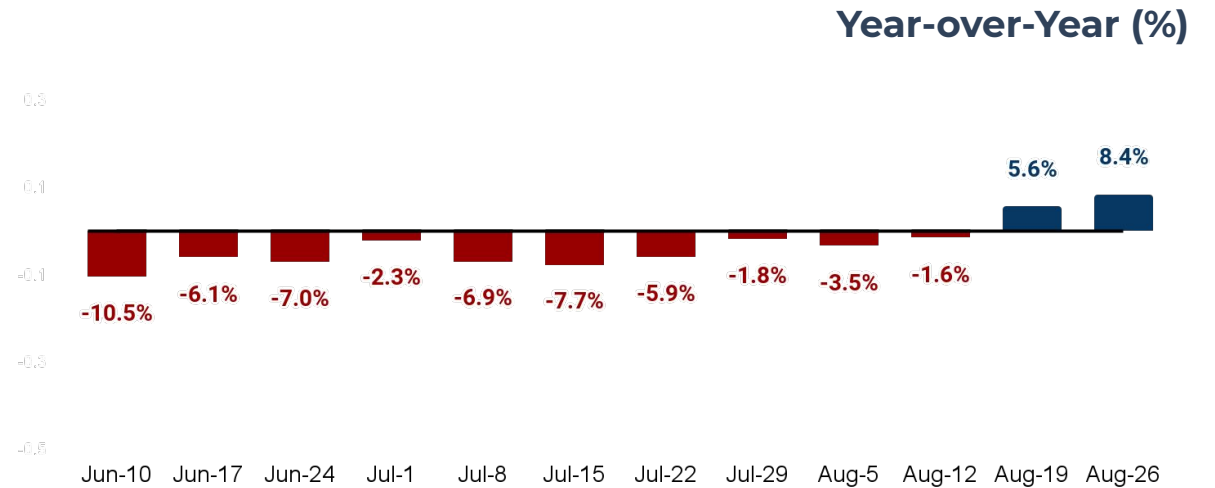
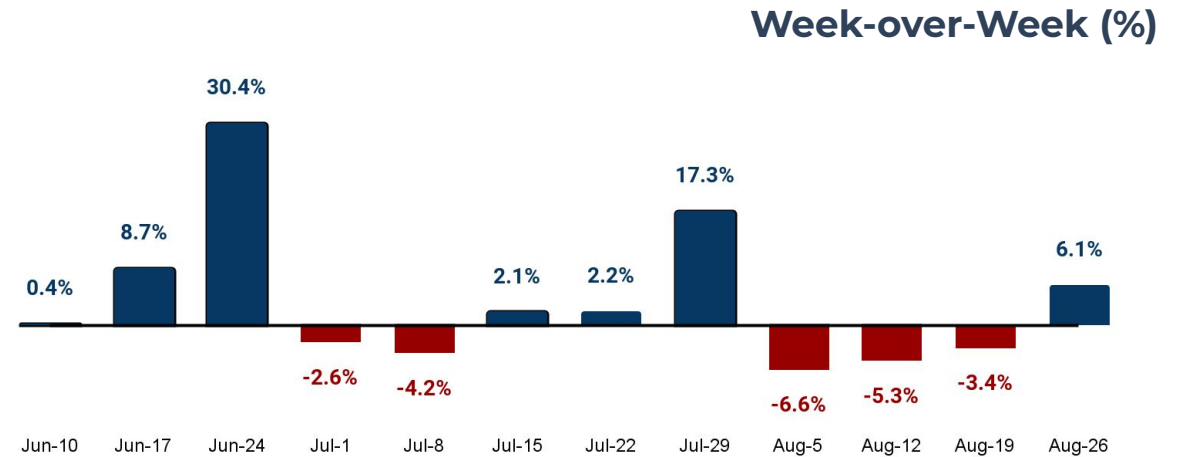
Environics Canada

Domestic Overnight Visitors - Weekly

BC & Regions

Key Findings

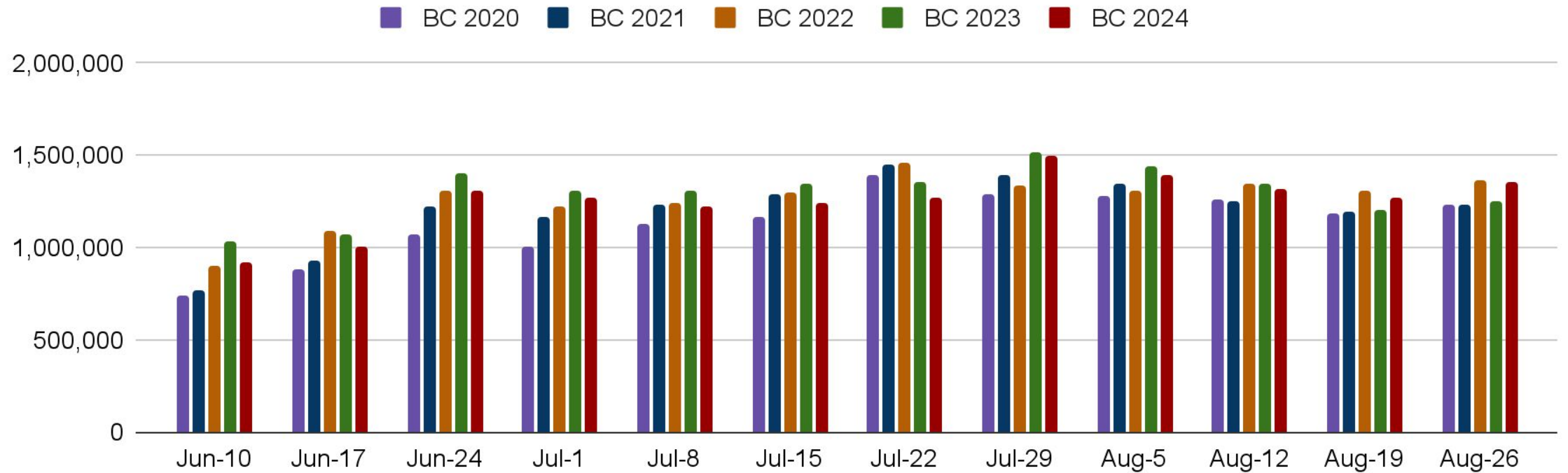
- British Columbia **increased 6.1%** when comparing Week 35 (August 26 - September 1, 2024) to Week 34 (August 19 - August 25, 2024).
- When comparing Week 35 to Week 34, all regions saw an **increase** in visitation.
- Year-over-year Overnight Visitation to BC for Week 35 is **up 8.4%** compared to the same week in 2023.



Domestic Overnight Visitors - Weekly

BC & Regions

Visitors Count - Weekly (2020-2024)



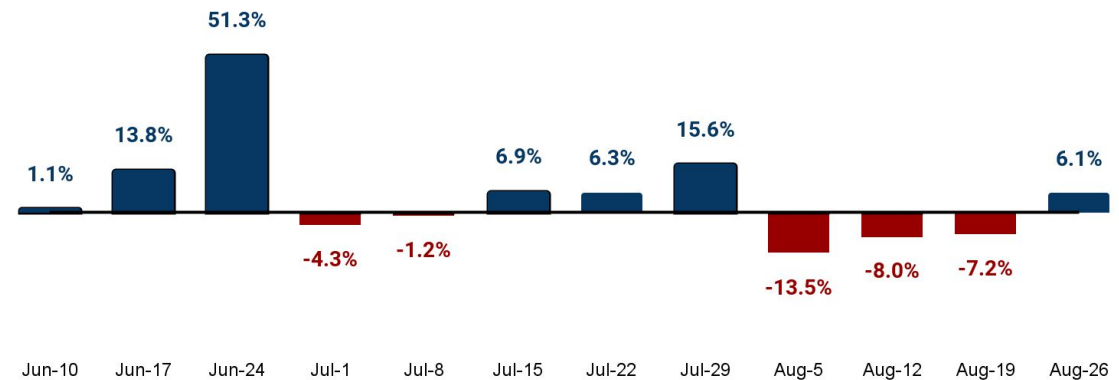
Domestic Overnight Visitors - Weekly

Kootenay Rockies Region

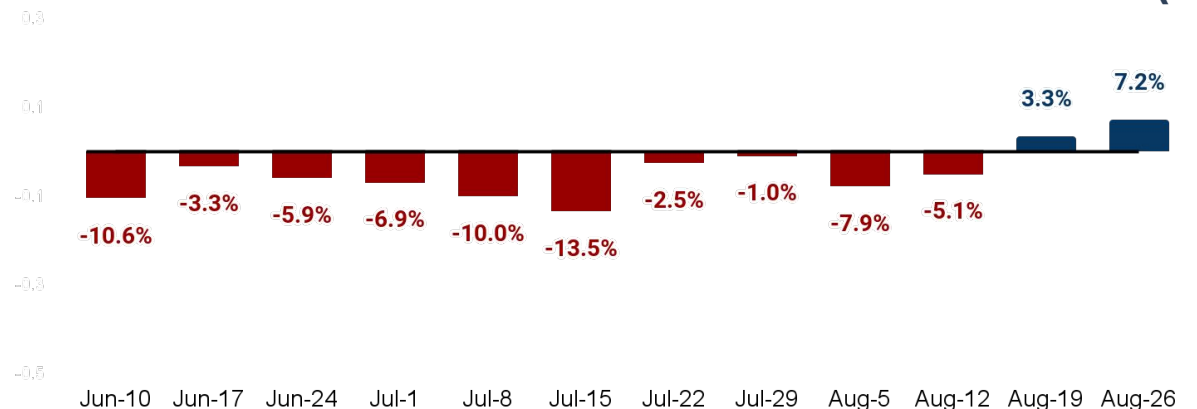
Key Findings

- Visitation to Kootenay Rockies **increased by 6.1%** comparing current week to the previous week.
- Year-over-year Overnight Visitation to Kootenay Rockies for Week 35 (August 26 - September 1, 2024) was **up 7.2%** compared to the same week in 2023.
- Year-over-year, the growth rate for Kootenay Rockies is **slightly lower** than that for the entire province.

Week-over-Week (%)



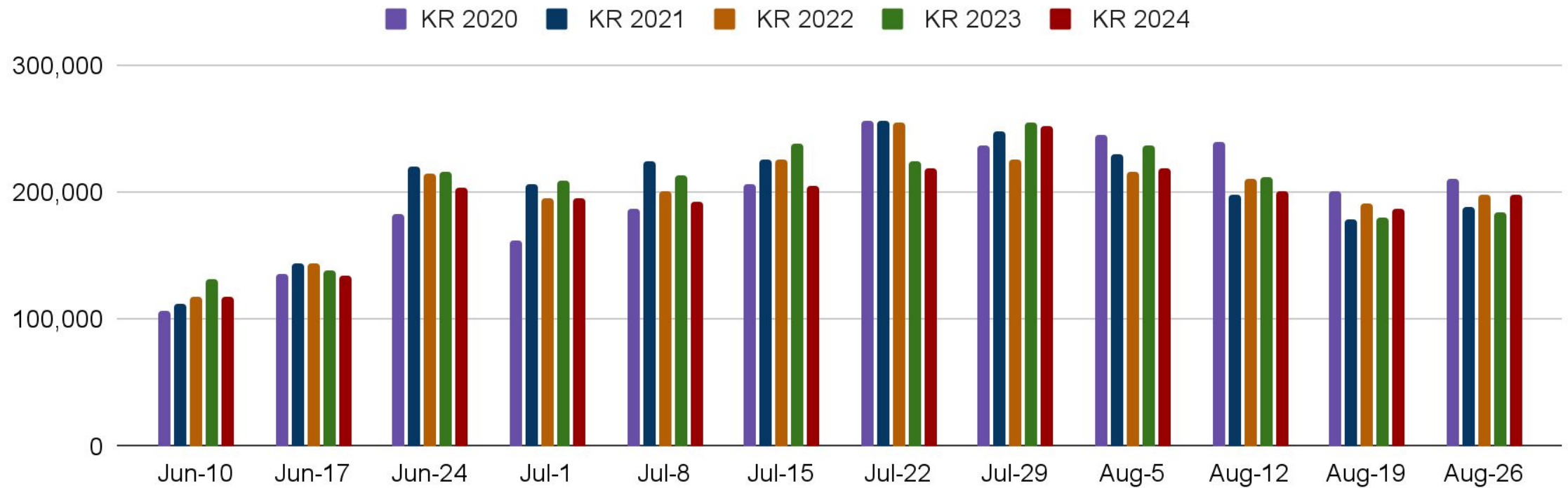
Year-over-Year (%)



Domestic Overnight Visitors - Weekly

Kootenay Rockies Region

Visitors Count - Weekly (2020-2024)





STR Hospitality Summary

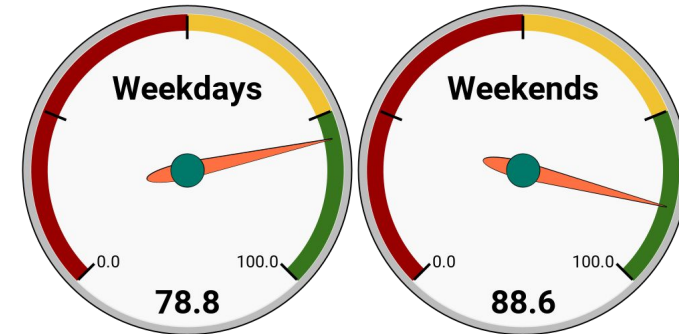
STR/BCHA

STR Summary BC & Regions

August 25 - August 31, 2024

- British Columbia had a **78.8%** Occupancy from Sunday-Thursday and a **88.6%** Occupancy during the weekend, up **6.2%** compared to the same week in 2023.
- British Columbia had an ADR of **\$276.5** from Sunday-Thursday and an ADR of **\$321.8** during the weekend, up **2.4%** compared to the same week in 2023.
- British Columbia had a RevPAR of **\$218** from Sunday-Thursday and a RevPAR of **\$285** during the weekend, up **8.7%** compared to the same week in 2023.

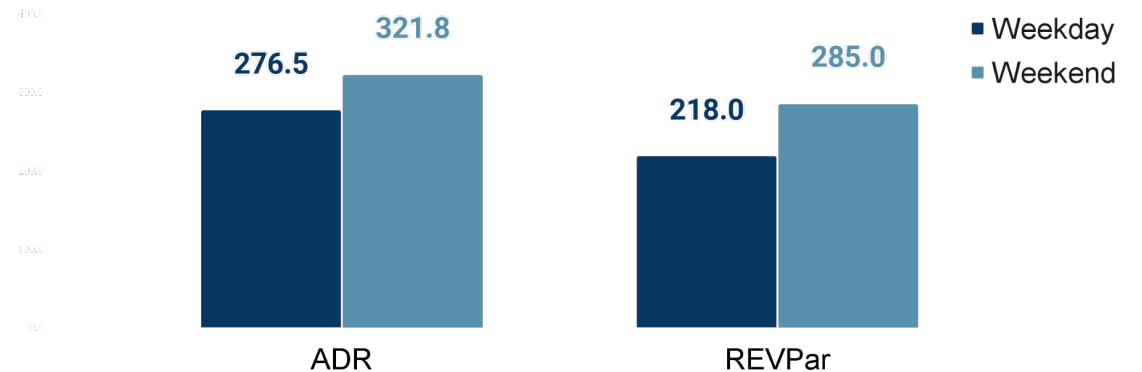
Average Occupancy



Regional Statistics the Weekend of August 30 - August 31, 2024:

	OCC	ADR	REVPAR
Vancouver	94.2%	\$367.7	\$346.2
Vancouver Island	91.5%	\$384.9	\$352.3
Whistler	87%	\$387.5	\$337.1
Thompson Okanagan	88.4%	\$246.6	\$218
Northern BC	64.7%	\$144.1	\$93.2
Kootenay Rockies	73.6%	\$254	\$187
Cariboo Chilcotin Coast	84.2%	\$156.4	\$131.7

Average of ADR and RevPAR by Weekday and Weekend

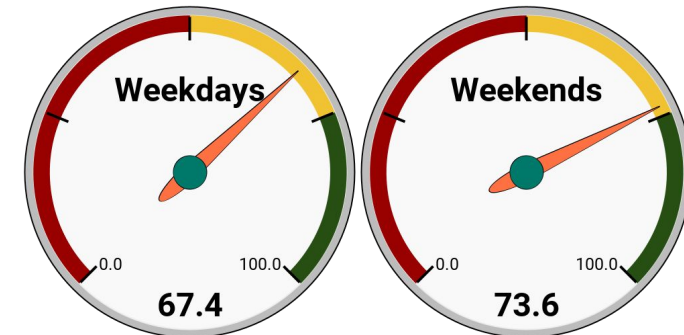


Kootenay Rockies Summary

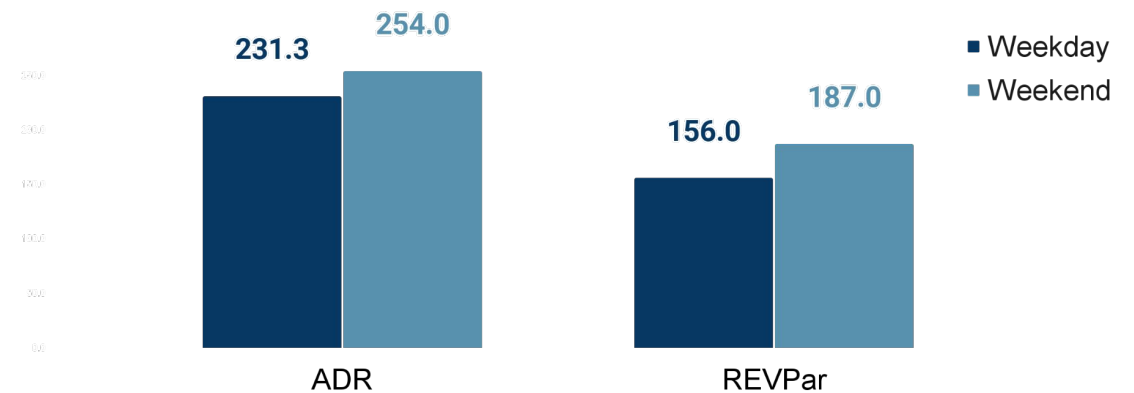
August 25 - August 31, 2024

- Kootenay Rockies had a **67.4%** Occupancy from Sunday - Thursday and a **73.6%** Occupancy during the weekend, giving the region the **second-lowest** percent Occupancy in BC.
 - Compared to the week of August 26, 2023, Occupancy is up **18%**
- Kootenay Rockies had an ADR of **\$231.3** from Sunday - Thursday and an ADR of **\$254** during the weekend, giving the region the **fourth-highest** ADR in BC.
 - Compared to the week of August 26, 2023, ADR is up **18.6%**
- Kootenay Rockies had a RevPAR of **\$156** from Sunday - Thursday and a RevPAR of **\$187** during the weekend, giving the region the **third-lowest** RevPAR in BC.
 - Compared to the week of August 26, 2023, RevPAR is up **39.9%**

Average Occupancy



Average of ADR and RevPAR by Weekday and Weekend



British Columbia:

Weekday (Sunday - Thursday)

Weekend (Friday - Saturday)

Compared to the same week in 2023

	OCC	ADR	REVPAR
Weekday (Sunday - Thursday)	78.8%	\$276.5	\$218
Weekend (Friday - Saturday)	88.6%	\$321.8	\$285
Compared to the same week in 2023	6.2%	2.4%	8.7%

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	August 7, 2023 (Week 32)	August 5, 2024 (Week 32)
Labour Day	September 4, 2023 (Week 36)	September 2, 2024 (Week 36)
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
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 2

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%
31	July 29 - August 4	-1.8%	-8.8%	-9.5%	-1.0%	-11.1%	-4.1%	7.3%
32	August 5 - August 11	-3.5%	-7.7%	-8.9%	-7.9%	-14.4%	-3.9%	5.3%

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
33	August 12 - August 18	-1.6%	6.5%	-4.9%	-5.1%	-17.6%	-7.7%	0.8%
34	August 19 - August 25	5.6%	51.5%	0.1%	3.3%	-15.7%	-7.0%	0.6%
35	August 26 - September 1	8.4%	27.6%	7.7%	7.2%	-11.4%	-0.1%	7.6%

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Robb MacDonald

Managing Director, Symphony Tourism Services

Email: rmacdonald@totabc.com

symphonytourismservices.com