

Measuring Canadian Travel Patterns

JANUARY 1, 2021 - JANUARY 02, 2022

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.



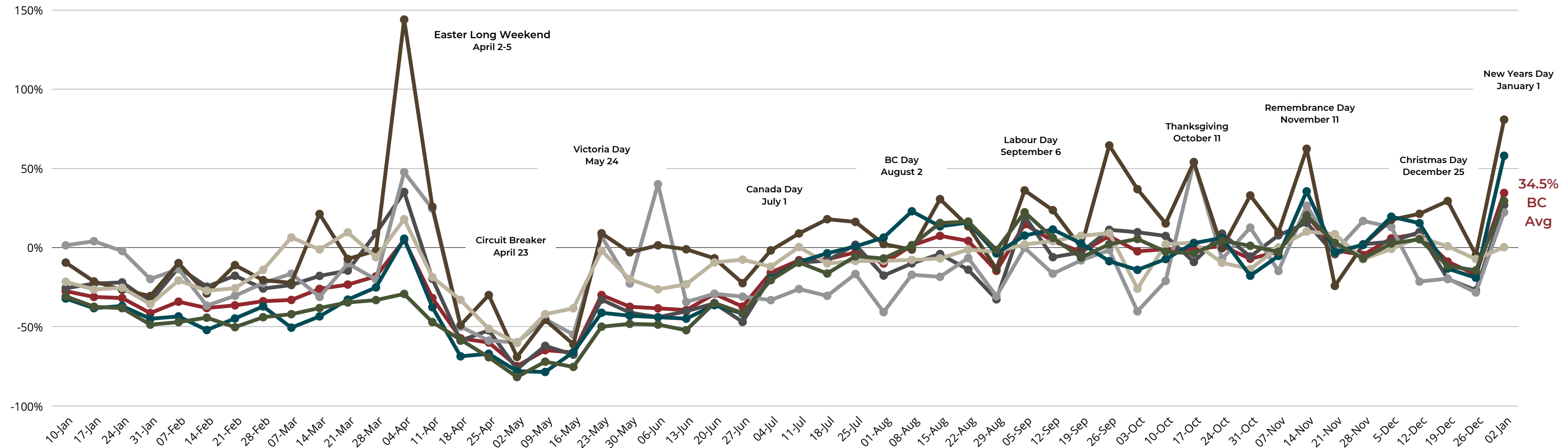
INTRODUCTION

- 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:

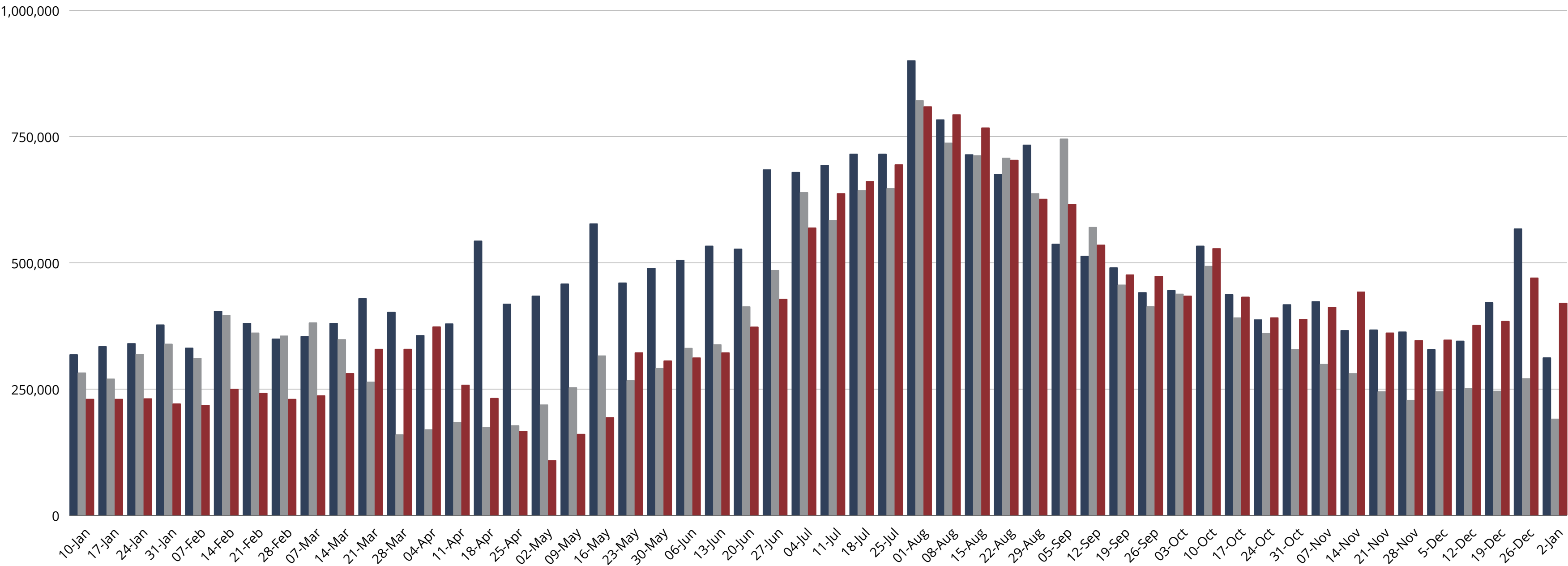
- Average Domestic Overnight Visitation to BC for Week 52 (Dec 27, 2021 - Jan 02, 2022) is **up 34.5%** compared to the same week in 2019 and all regions saw an **increase** in mobile movement when comparing Week 51 (Dec 20 - 26, 2021) to Week 52 (Dec 27, 2021 - Jan 02, 2022)
- While it appears that the week ending Dec 26, 2021 was quite down compared to the same week in 2019, and the following week quite a bit higher, it is important to note that the days that the holidays fell on vary each year and can result in different travel movement
- If we compare the total volume of visitors during the two final weeks of the year, in 2019 it was approximately 1M and in 2021 it was approximately 900K which is a difference of **-10%**
- Important to note that this is not reflected in hotel occupancy, which continues to be down compared to 2019, as it includes visiting friends and relatives and stays at vacation rentals.

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 60kms 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 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.
- Weekly comparisons may not reflect the exact same date range year over year. Therefore holiday weekends may fall on different weeks and result in higher peaks in the current year.
- Provincial Health Order limit to non-essential travel within the Province from April 23, 2021 through May 15, 2021. Domestic travel within Canada permitted as of July 1.

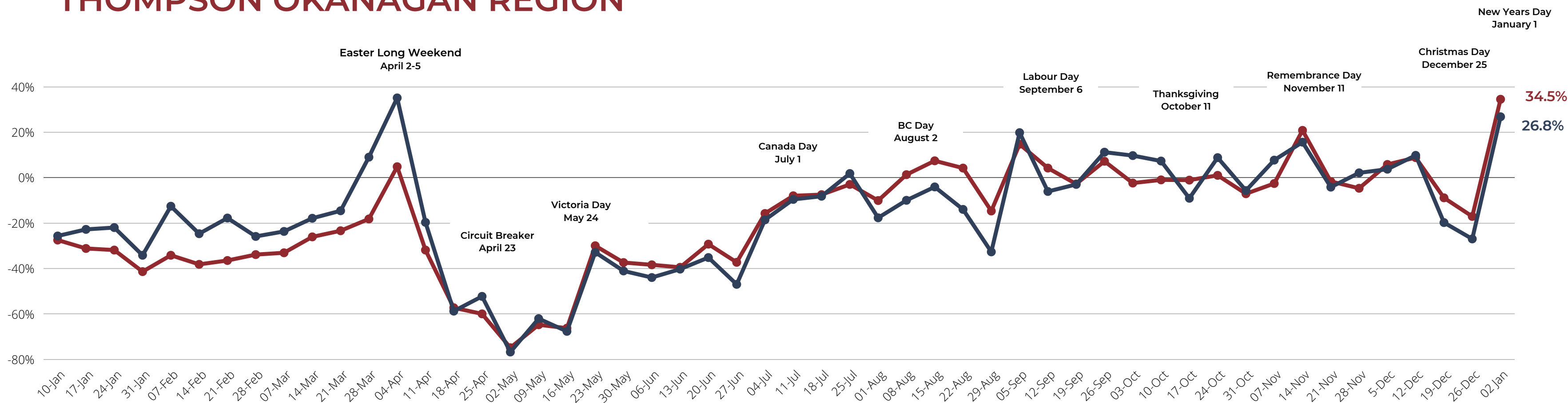
DOMESTIC OVERNIGHT VISITORS - WEEKLY YEAR OVER YEAR (2019, 2020, 2021) VARIATION

BRITISH COLUMBIA



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

THOMPSON OKANAGAN REGION



Key Findings:

- Domestic Overnight Visitation to the Thompson Okanagan for Week 52 (Dec 27, 2021 - Jan 02, 2022) is **up 26.8%** compared to the same week in 2019
- The Thompson Okanagan saw **7.7% less visitation** when compared to British Columbia during Week 52 (Dec 27, 2021 - Jan 02, 2022)
- While it appears that the week ending Dec 26, 2021 was quite down compared to the same week in 2019, and the following week quite up, it is important to note that the days that the holidays fell on vary each year and can result in different travel movements.
- If we compare the total volume of visitors during the two final weeks of the year, in 2019 it was approximately 186,000 and in 2021 it was approx 172,000 which means a difference of **-7%**
- Important to note that this is not reflected in hotel occupancy, which continues to be down compared to 2019, as it includes visiting friends and relatives and stays at vacation rentals.

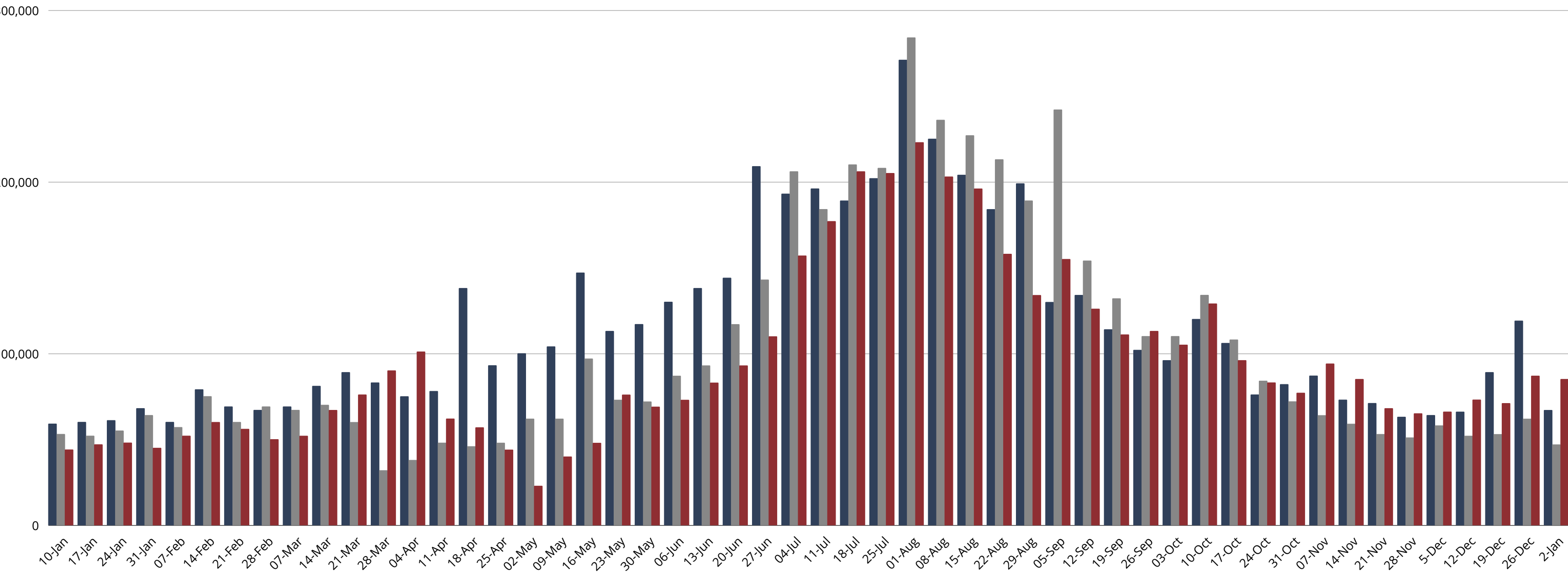
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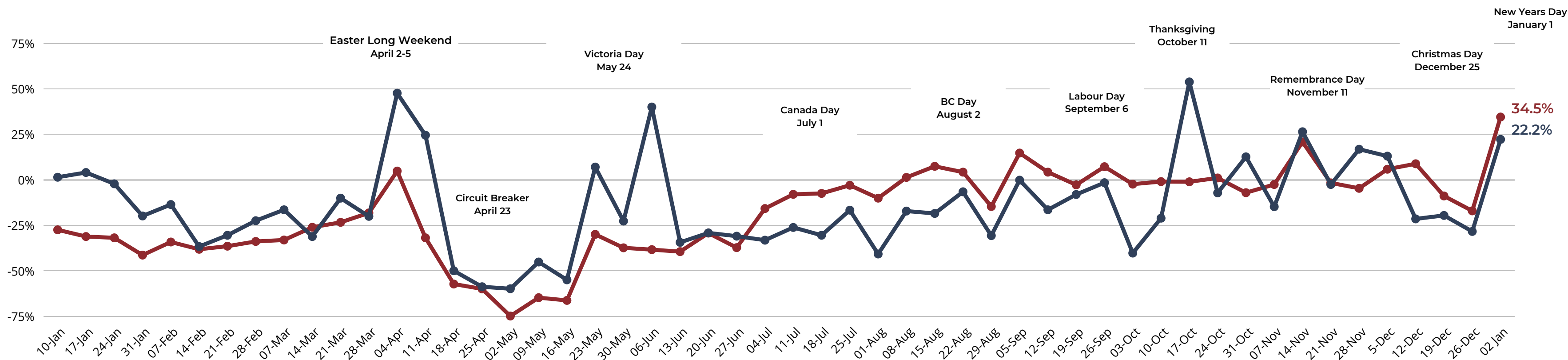
DOMESTIC OVERNIGHT VISITORS - WEEKLY YEAR OVER YEAR (2019, 2020, 2021) VARIATION

THOMPSON OKANAGAN REGION



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

CARIBOO CHILCOTIN COAST



Key Findings:

- Domestic Overnight Visitation to the Cariboo Chilcotin Coast for Week 52 (Dec 27, 2021 - Jan 02, 2022) is **up 22.2%** compared to the same week in 2019
- The Cariboo Chilcotin Coast saw **12.3% less visitation** when compared to British Columbia during Week 52 (Dec 27, 2021 - Jan 02, 2022)
- While it appears that the week ending Dec 26, 2021 was quite down compared to the same week in 2019, and the following week quite up, it is important to note that the days that the holidays fell on vary each year and can result in different travel movements.
- If we compare the total volume of visitors during the two final weeks of the year, in 2019 it was approximately 27,000 and in 2021 it was approx 23,000 which means a difference of **-15%**
- Important to note that this is not necessarily reflected in hotel occupancy data, as it includes visiting friends and relatives and stays at vacation rentals.

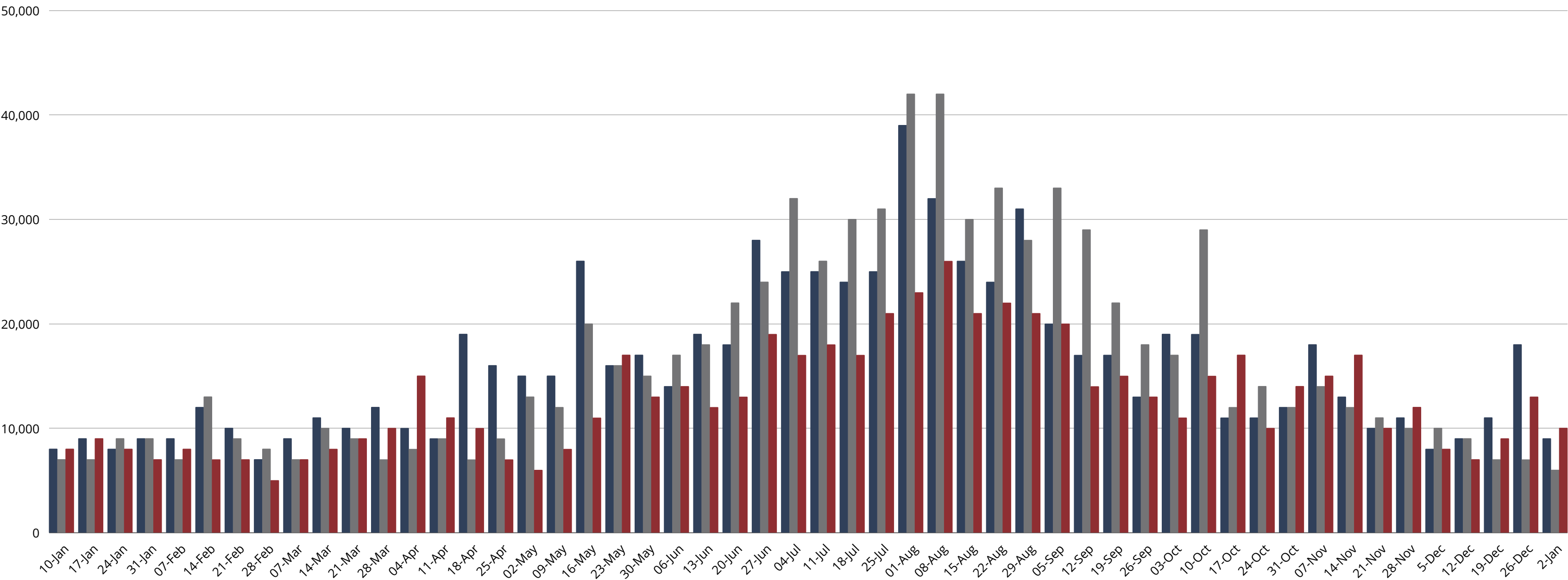
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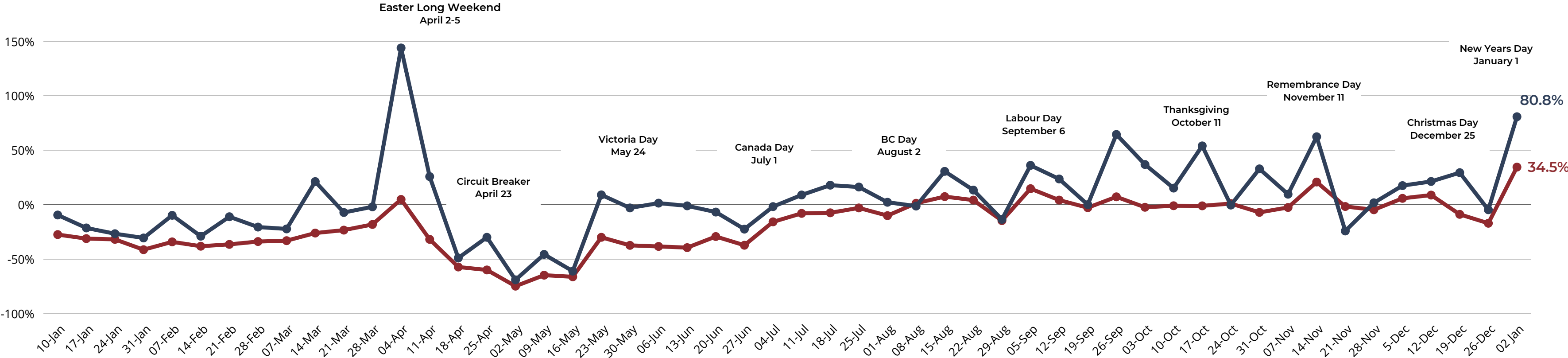
DOMESTIC OVERNIGHT VISITORS - WEEKLY YEAR OVER YEAR (2019, 2020, 2021) VARIATION

CARIBOO CHILCOTIN COAST



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

KOOTENAY ROCKIES



Key Findings:

- Domestic Overnight Visitation to the Kootenay Rockies for Week 52 (Dec 27, 2021 - Jan 02, 2022) is **up 80.8%** compared to the same week in 2019
- The Kootenay Rockies saw **46.3% more visitation** when compared to British Columbia during Week 52 (Dec 27, 2021 - Jan 02, 2022)
- While it appears that the week ending Dec 26, 2021 was quite down compared to the same week in 2019, and the following week quite up, it is important to note that the days that the holidays fell on vary each year and can result in different travel movements.
- If we compare the total volume of visitors during the two final weeks of the year, in 2019 it was approximately 91,000 and in 2021 it was approx 117,000 which means a difference of **+28%**
- Important to note that this is not reflected in hotel occupancy, which continues to be down compared to 2019, as it includes visiting friends and relatives and stays at vacation rentals.

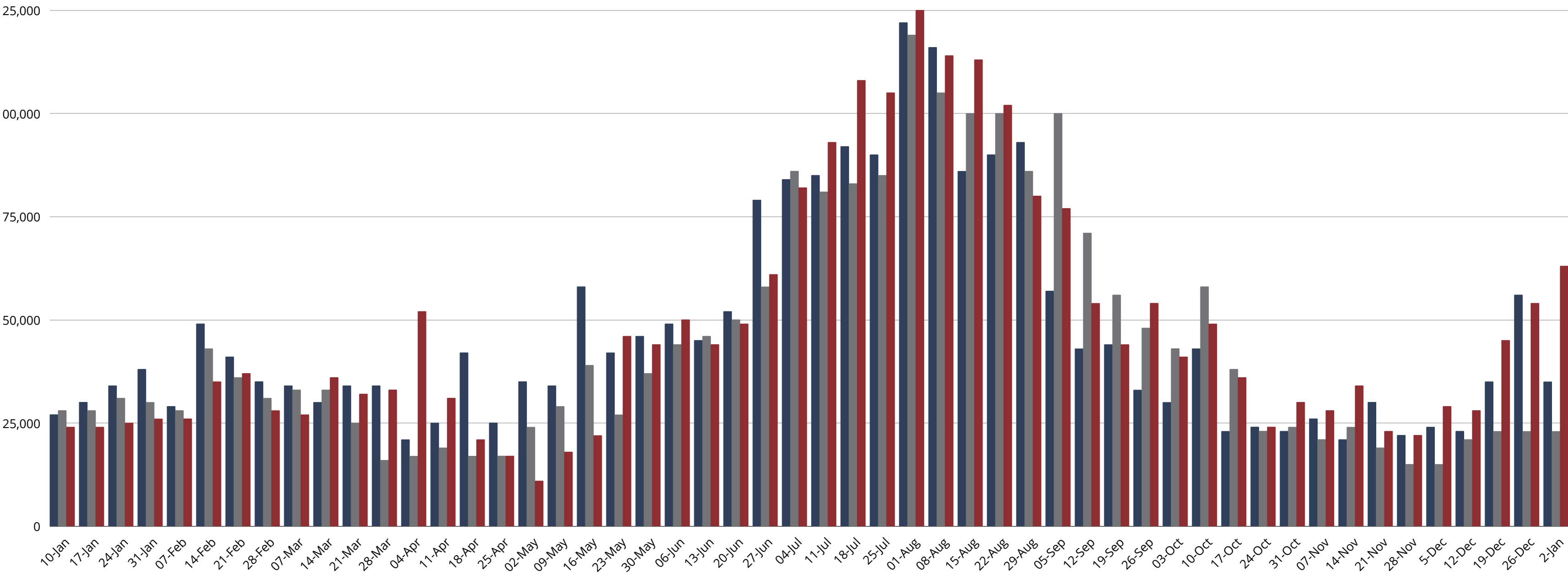
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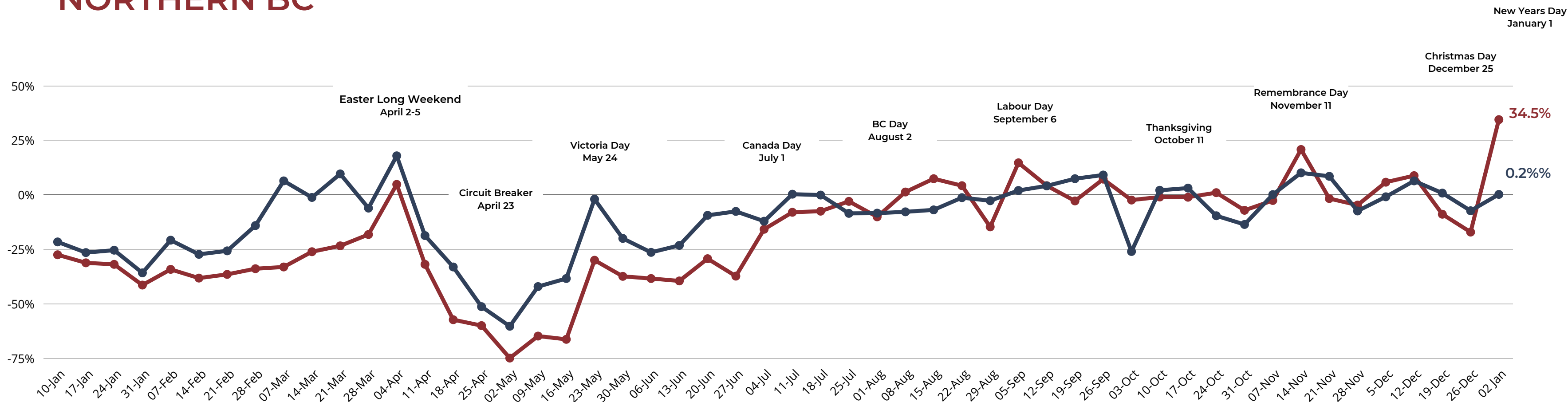
DOMESTIC OVERNIGHT VISITORS - WEEKLY YEAR OVER YEAR (2019, 2020, 2021) VARIATION

KOOTENAY ROCKIES



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

NORTHERN BC



Key Findings:

- Domestic Overnight Visitation to Northern BC for Week 52 (Dec 27, 2021 - Jan 02, 2022) is **up 0.2%** compared to the same week in 2019
- Northern BC saw **34.3% less visitation** when compared to British Columbia during Week 52 (Dec 27, 2021 - Jan 02, 2022)
- While it appears that the week ending Dec 26, 2021 was quite down compared to the same week in 2019, and the following week quite up, it is important to note that the days that the holidays fell on vary each year and can result in different travel movements.
- If we compare the total volume of visitors during the two final weeks of the year, in 2019 it was approximately 86,000 and in 2021 it was approx 82,000 which means a difference of **-5%**
- Important to note that this is not reflected in hotel occupancy, which continues to be down compared to 2019, as it includes visiting friends and relatives and stays at vacation rentals.

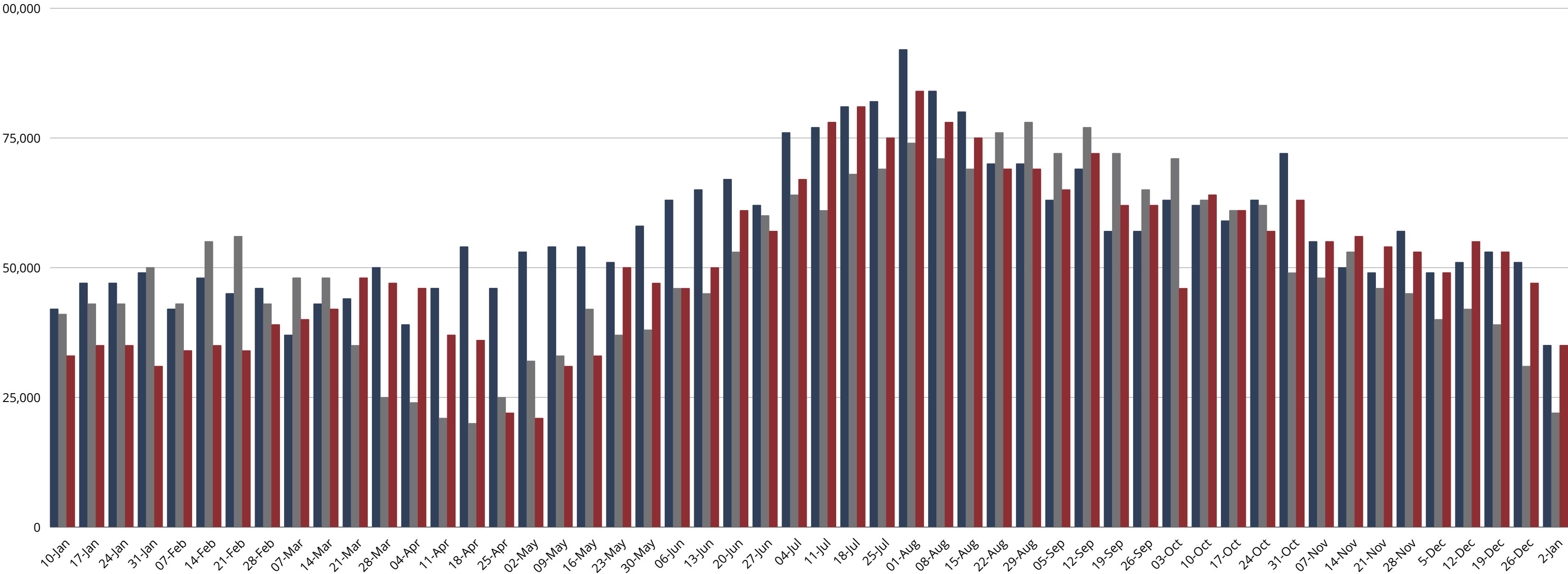
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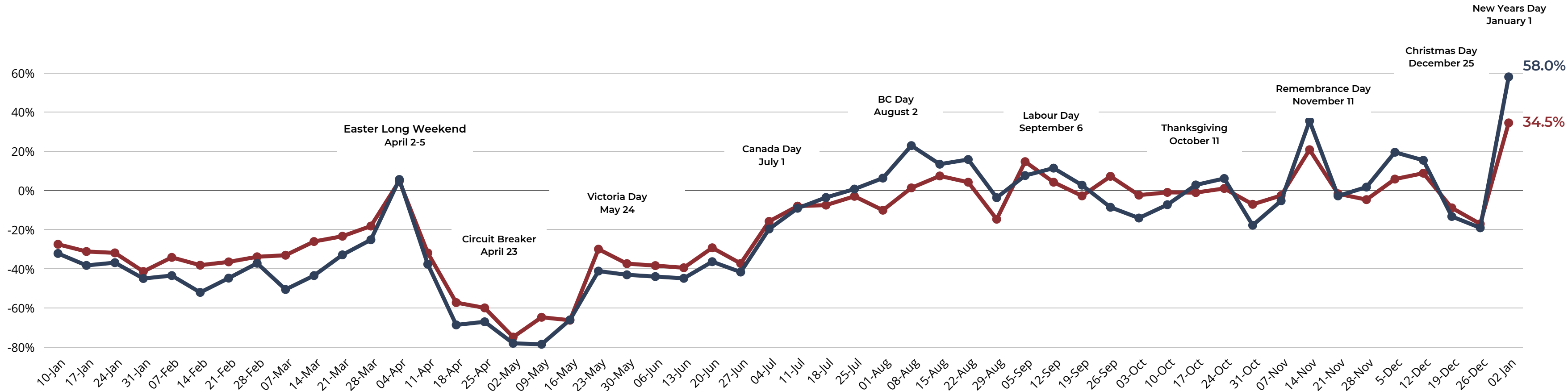
DOMESTIC OVERNIGHT VISITORS - WEEKLY YEAR OVER YEAR (2019, 2020, 2021) VARIATION

NORTHERN BC



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

VANCOUVER ISLAND



Key Findings:

- Domestic Overnight Visitation to Vancouver Island for Week 52 (Dec 27, 2021 - Jan 02, 2022) is **up 58.0%** compared to the same week in 2019
- Vancouver Island saw **23.5% more visitation** when compared to British Columbia during Week 52 (Dec 27, 2021 - Jan 02, 2022)
- While it appears that the week ending Dec 26, 2021 was quite down compared to the same week in 2019, and the following week quite up, it is important to note that the days that the holidays fell on vary each year and can result in different travel movements.
- If we compare the total volume of visitors during the two final weeks of the year, in 2019 it was approximately 212,000 and in 2021 it was approx 221,000 which means a difference of **+4%**
- Important to note that this is not reflected in hotel occupancy, which continues to be down compared to 2019, as it includes visiting friends and relatives and stays at vacation rentals.

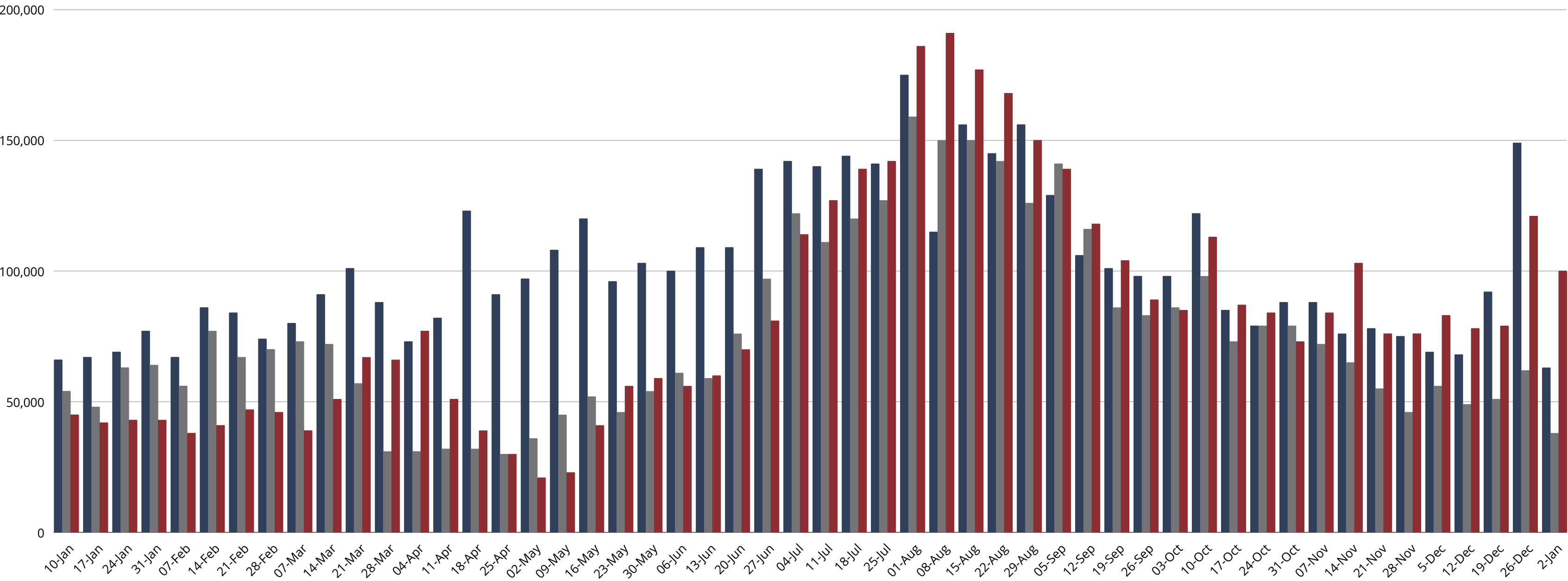
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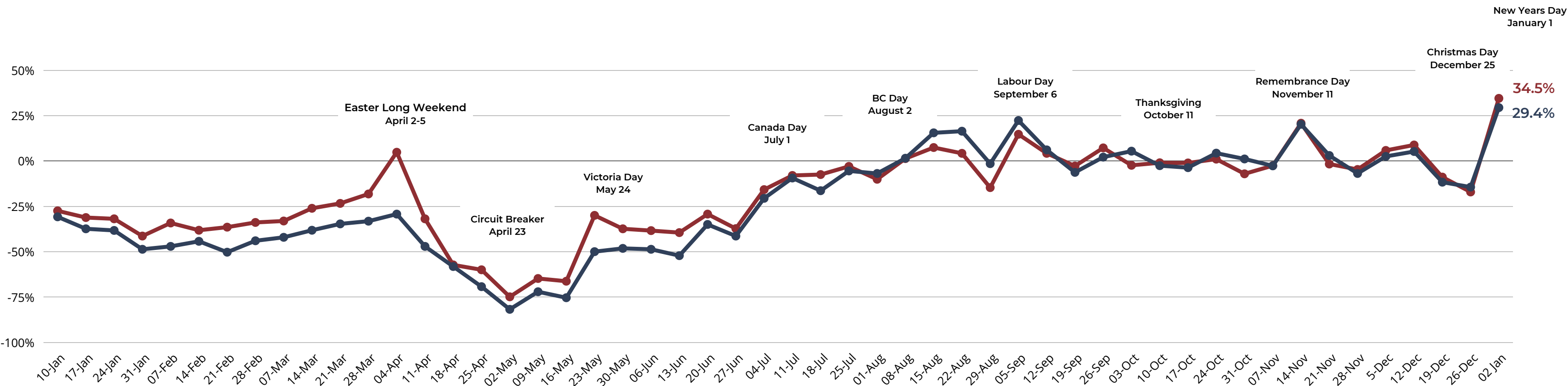
DOMESTIC OVERNIGHT VISITORS - WEEKLY YEAR OVER YEAR (2019, 2020, 2021) VARIATION

VANCOUVER ISLAND



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

VANCOUVER, COAST & MOUNTAINS



Key Findings:

- Domestic Overnight Visitation to Vancouver Coast & Mountains for Week 52 (Dec 27, 2021 - Jan 02, 2022) is **up 29.4%** compared to the same week in 2019.
- Vancouver, Coast & Mountains saw **5.1% less visitation** when compared to British Columbia Week 52 (Dec 27, 2021 - Jan 02, 2022)
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- If we compare the total volume of visitors during the two final weeks of the year, in 2019 it was approximately 212,000 and in 2021 it was approx 221,000 which means a difference of **+2%**
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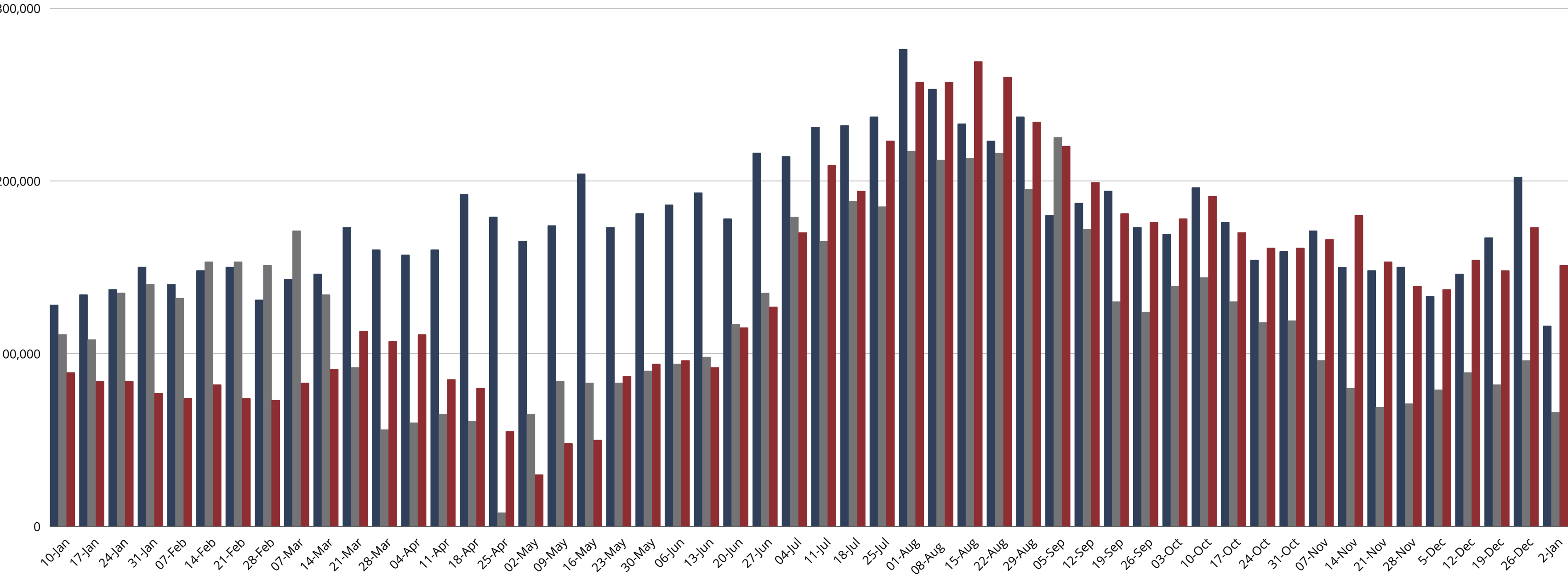
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DOMESTIC OVERNIGHT VISITORS - WEEKLY YEAR OVER YEAR (2019, 2020, 2021) VARIATION

VANCOUVER, COAST & MOUNTAINS



STR Destination Report

December 26, 2021 to January 01, 2022



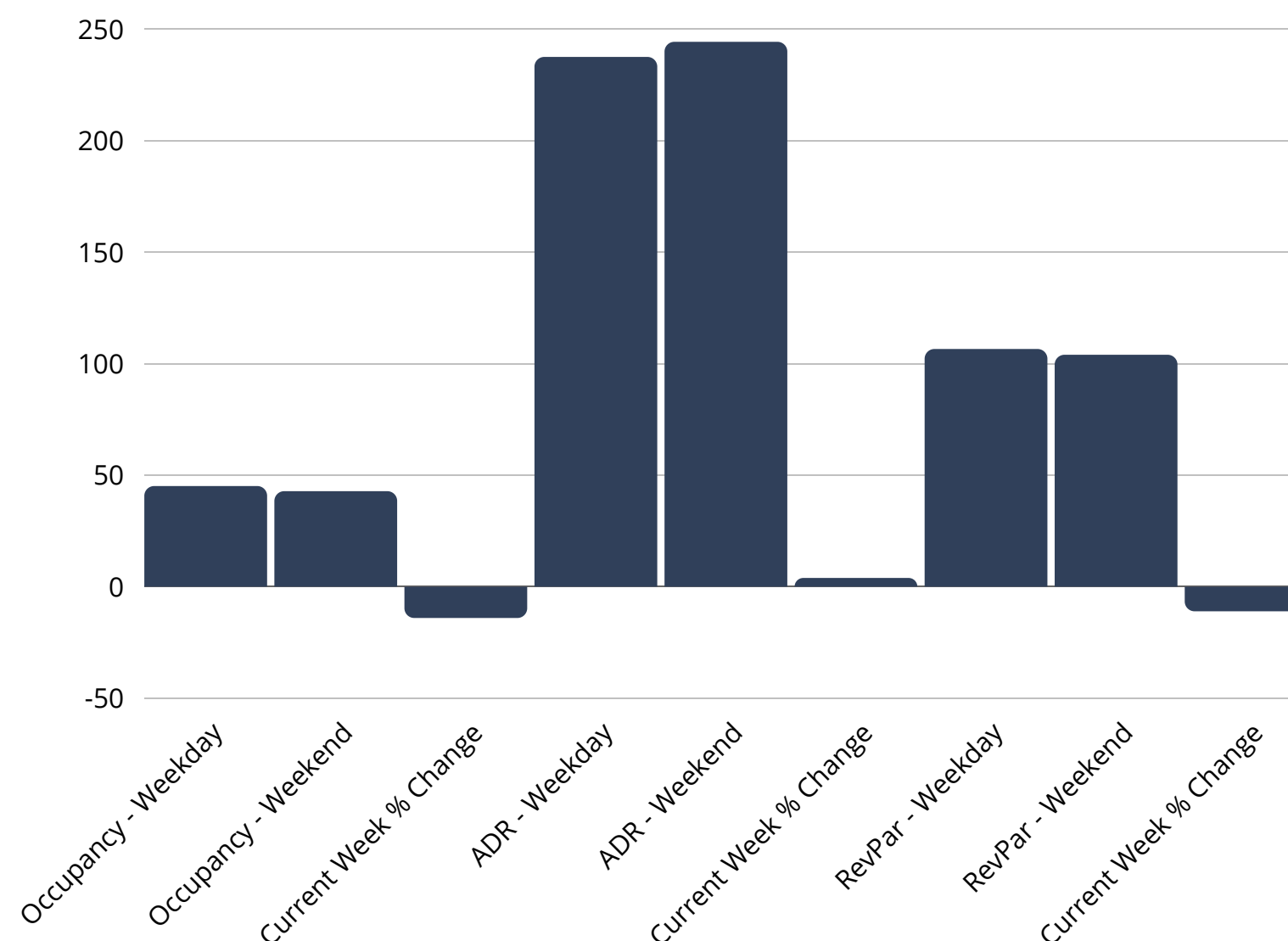
STR SUMMARY BC & REGIONS

DECEMBER 26 2021 - JAN 01 2022

- British Columbia had a **44.8%** occupancy from Sunday-Thursday and a **42.5%** occupancy during the weekend, down **-13.7%** compared to the same week in 2019.
- British Columbia had an ADR of **\$237.17** from Sunday-Thursday and an ADR of **\$243.94** during the weekend, up **3.6%** compared to the same week in 2019.
- British Columbia had a RevPAR of **\$106.24** from Sunday-Thursday and a RevPAR of **\$103.65** during the weekend, down **-10.7%** compared to the same week in 2019.

REGIONAL STATS WEEKEND OF December 31, 2021 - Jan 1, 2022:

- Cariboo Chilcotin Coast: OCC 25.6% ADR \$162.01 REVPAR \$41.43
- Kootenay Rockies: OCC 34.2% ADR \$174.91 REVPAR \$59.81
- Northern BC: OCC 22.8% ADR \$123.30 REVPAR \$28.09
- Thompson Okanagan: OCC 38.0% ADR \$149.03 REVPAR \$56.61
- Vancouver Island: OCC 43.9% ADR \$192.65 REVPAR \$84.62
- Vancouver: OCC 48.3% ADR \$200.10 REVPAR \$96.61
- Whistler: OCC 67.5% ADR \$938.51 REVPAR \$633.55



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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

CONTACT US



Symphony Tourism Services

Email: info@symphonytourism.ca

Phone: 778.721.5448

symphonytourismservices.com

