bcrts
British Columbia Regional Tourism Secretariat

OCTOBER 2021 UPDATE

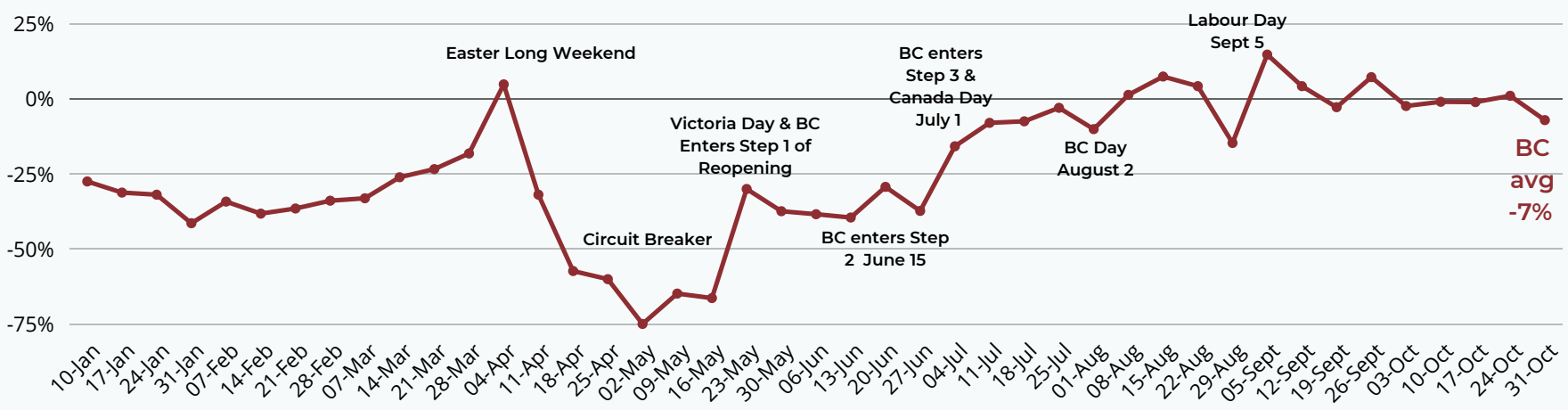
Nov 29, 2021

RECOVERY TRACKING: VISITATION INDICATORS

Weekly Domestic Overnight Visitors to BC 2021 vs 2019

1.

Canadian overnight visitor volume hovered around 2019 levels through the month of October, on average, ending the month at -7% compared to 2019.



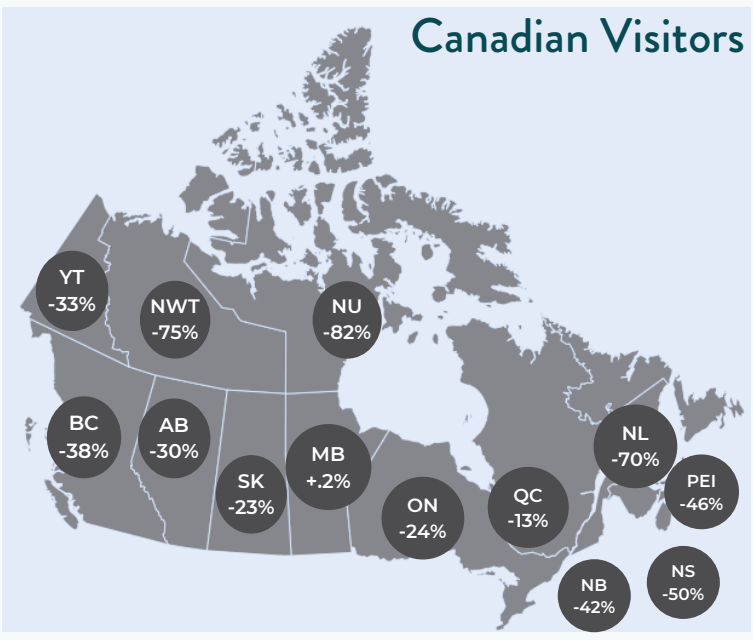
Domestic overnight visitor volume for the month of October, 2021 has been relatively consistent over the five weeks of the month, on average just below 2019 numbers, while dipping at the end of the month to -7% compared to the same week in 2019.

The BC Tourism Regions varied up and down week to week, with each ending up with overall averages for the month just above or just below 2019 numbers. Kootenay Rockies was the exception, consistently above 2019 numbers throughout the month with some weeks at the same level as 2019 and other weeks 30-50% above.

Note: Environics Analytics' Weekly Tracker tracks movement of mobile devices and counts visitors as anyone 60km from home overnight between the hours of 8pm and 8am.

Canadian Visitors to BC in Q3 (Jul-Sept) 2021 vs 2019

2.



Total Estimated Yearly Canadian Visitors Q3:
2019: 5,573,400
2020: 5,280,100
2021: 3,668,300

Decrease of **-34%** 2019 over 2021

Decrease of **-31%** 2021 over 2020

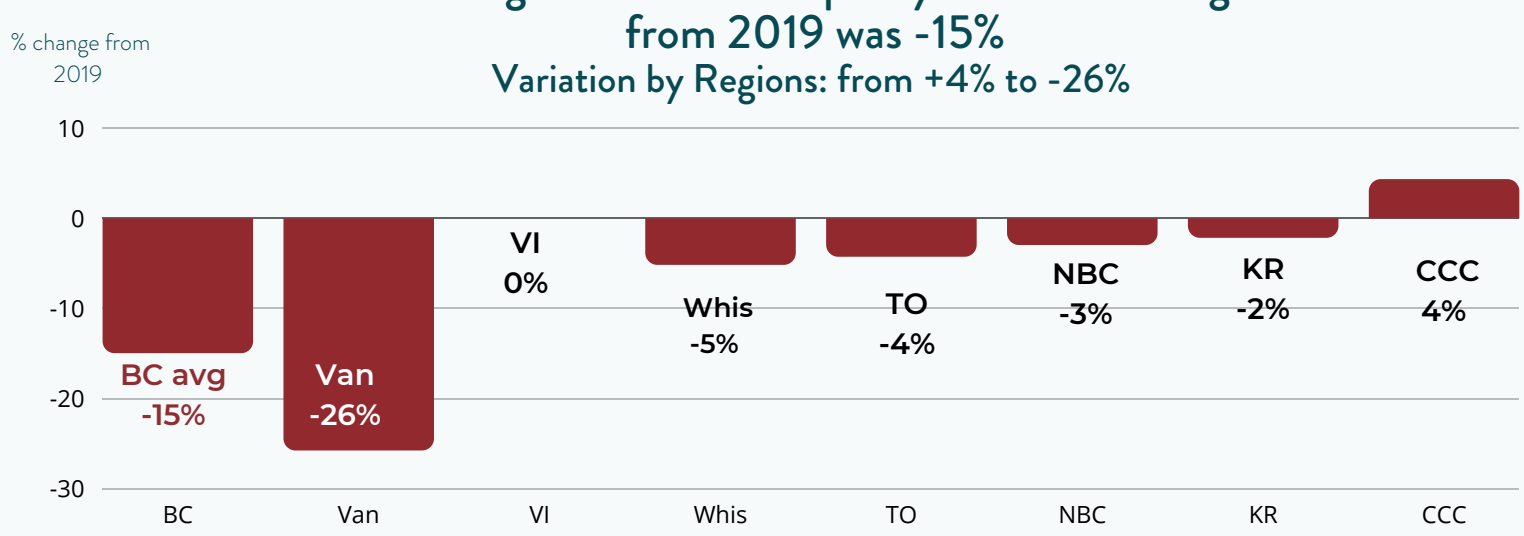
- All provinces visiting BC showed a decrease in levels between -82% (NU) to -13% (QC) comparing Q3 2021 to 2019 except for MB which increased by .2%.
- Monthly Canadian Visitation Update:
  - July 2021: 5% above July 2020 numbers and 3% below 2019.
  - Aug. 2021: 4% below August 2020 numbers and 11% below 2019.
  - Sept 2021: 8% below Sept 2020 numbers and 6% below 2019.
  - October 2021: 2% above October 2020 numbers and 5% below 2019.

BC Hotel Performance 2021 YTD vs 2019

BC Avg. October Occupancy Percent Change from 2019 was -15%

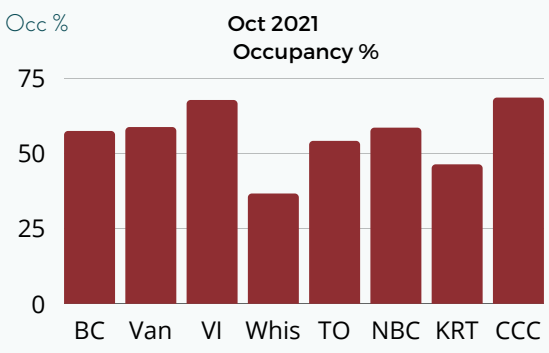
Variation by Regions: from +4% to -26%

3.

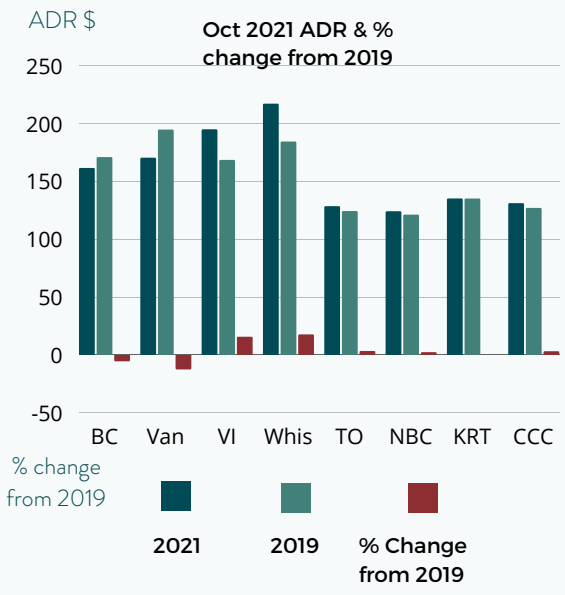


- Looking at real occupancy for the month of October 2021 compared to October 2019, BC's average was -15% (57% occupancy in Oct 2021 vs 67.5% occupancy in Oct 2021)
  - The October 2021 Year-to-date (YTD) figure is -33%, with 2021 Oct YTD occupancy of 48% vs Oct 2019 YTD of 72%.
- Average Daily Rate (ADR) for Oct 2021 was $160, -5.5% compared to 2019 rates, with Vancouver lowest at -12.5% and other regions ranging from +18% (Whistler) to 0% (Kootenay Rockies).
  - The BC YTD Oct 2021 ADR is at -17% compared to 2019 and as low as -27% for Vancouver compared with YTD Oct 2019.
- The BC Revenue Per Available Room (RevPAR) for Oct 2021, averaged -20% compared to 2019, an improvement of 9 points since Sept, with Vancouver at -35% compared to the same month in 2019 respectively, and the other regions ranging from -2% (KR) to +16% (VI).
  - The YTD Oct 2021 RevPAR is still quite behind 2019 YTD, at -45% on average in BC; -60% (Whis), -58% (Van), -20% (VI), -15% (KR), -17% (TO), -14% (NBC), and -6% (CCC), all improving about 2 points since September.
- The YTD figures have been included to show the cumulative impact; while some months show improvements or occupancy levels relatively close to 2019, the losses have not been recuperated and all regions are showing averages below 2019 levels.
- Note this data reflects responses from approximately 25-50% of accommodations in the province, and mainly chains, and therefore trends noted above may differ from anecdotal reports.

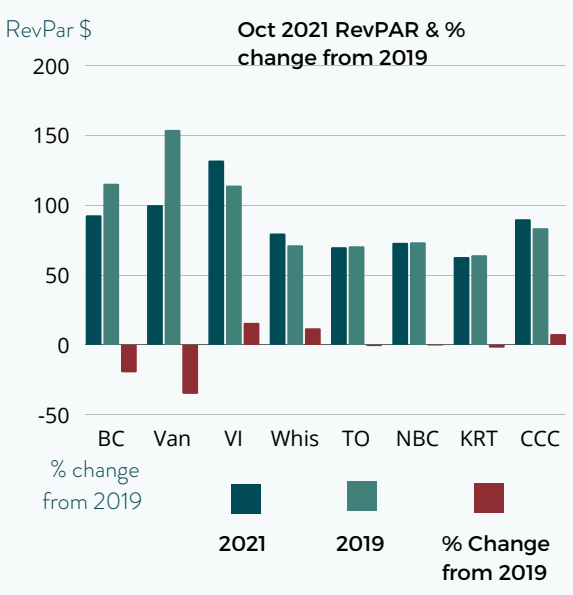
Regional Occupancy for Oct 2021 ranged from 37% in KR to 68% in CCC. BC Avg was 57% (vs 67% in 2019).



BC ADR for Oct 2021 was $161 (vs $170 in 2019), -5.5% compared to 2019



BC Avg RevPAR for Oct 2021 is $80 (vs $145 in 2019), -20% compared to 2019.



NOTES:

1. Environics Analytics Weekly Tourism Tracker, BCRTS, Symphony Tourism Services
2. Visitor View Monthly Visitor Highlights, BCRTS, Environics Analytics, Symphony Tourism Services
3. STR Monthly YTD Report, BCRTS, Symphony Tourism Services

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RECOVERY TRACKING: BUSINESS RESPONSES

The current period, October 2021, found British Columbia in the beginning of the shoulder season, with Canada-wide travel permitted and the second month with international travellers permitted. October domestic visitor numbers continued the trend we saw in September of resembling more closely 2019 volumes. In regards to accommodation recovery, we can see through the year-to-date revenue figures that there are major losses still to be overcome. The challenges of labour shortages continue to be a theme from the direct contact with tourism stakeholders through the COVID-19 Impact Report and BC Tourism Resiliency Program. The following indicators are tracked now bi-monthly via business surveys to provide a picture of concerns and recovery trends.

COVID-19 Impact Report: Recovery Trends Sept & Oct 2021

Of the 181 firms surveyed in Sept & Oct 2021:

28% reported "business as usual" indicating sector continuing to face abnormal business conditions (similar to previous report, up from 18% in June). Hotels and resorts showing the highest percentage of closed firms (27%).

33% reported using less than half their usual staff for this time of year, a small improvement from June. The average staffing level rose to 67% in July and dropped to 58% in August.

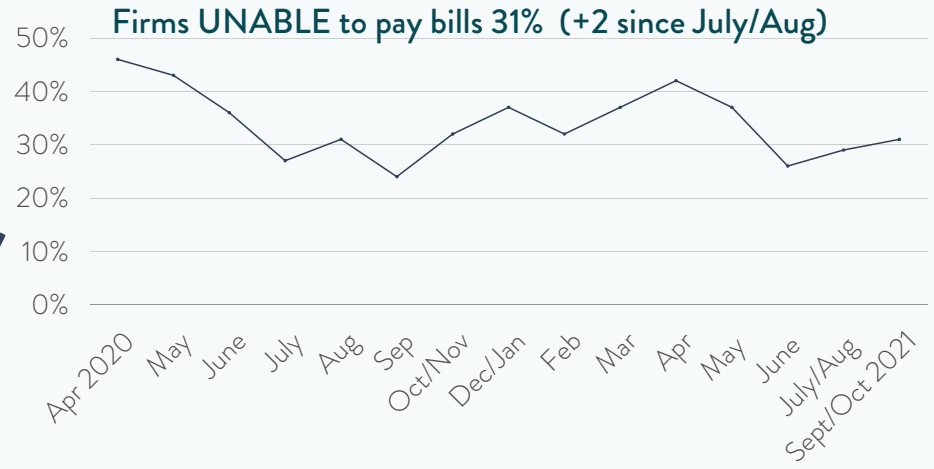
Hardest Hit: Seasonal businesses suffered greater losses and less likely to pay all of their bills

30% reported losing more than half of their revenue relative to the same month in 2019. And 58% reported losses of 25% or more year over year.

31% were unable to pay their Aug/Sept 2021 bills, an increase of 2 percentage points since July/Aug report.

17–33% reported being ineligible for major provincial and federal programs targeted for businesses, a stationary trend over time.

50% reported receiving a quarter or less than their 2019 bookings.



Significant Issues:

Staff shortages and capacity restrictions have disproportionately affected food & beverage businesses, while international travel restrictions have had the largest impact on hotels and remote businesses.

Tourism Resiliency Network September 2021 Highlights

British Columbia Tourism Resiliency Network

2,014 Businesses Registered in the Program

Women-Owned Businesses	425
Indigenous-Owned Businesses	145
Youth-Owned Businesses	5

Restart Concerns and Adaptation Signs from Hospitality & Tourism Businesses:

Concerns and Challenges:

- Common themes continued throughout the month of October were staffing challenges/ labour shortage
- Businesses have indicated they are offering higher wages and working harder to retain good staff.
- Requests for funding opportunities that do not require repayment
- Stakeholders affected by the wildfires, media and smoke challenges are looking for additional funding and roundtables to discuss experiences and solutions

Companies Expressed Interest in:

- Digital marketing support including TripAdvisor and other business listings and ad support for further digital adaptation
  - Ready to e-Market Program offered by BCRTS and DBC's Digital Academy offerings promoted
- Travel offers such as ads promoted by DBC and other platforms
- Inclusion of Indigenous cultural experiences in offerings and reconciliation
- More information on Tourism Relief Fund and Employee Lockdown Benefit

"The hardest issue is capacity issues in the winter. Keeping the 6-foot spacing as well as requiring double vaccinations and masks seems redundant" - Remote F&B business

"The grants being offered would have helped my business weather the storm, however the qualifications are too narrow for my young business" - Urban transportation business

NOTES:

4. BCRTS COVID-19 Impact Report September & October 2021
5. BC Tourism Resiliency Network Oct 2021 Report

Visit https://tourismresiliency.ca/reports/#impact-reports

A collaboration between:

Cariboo Chilcotin Coast Tourism Association
Kootenay Rockies Tourism Association
Northern BC Tourism Association
Thompson Okanagan Tourism Association
Tourism Association of Vancouver Island

Prepared by Symphony Tourism Services