



DESTINATION
BRITISH COLUMBIA®

COVID-19 Research Roundup

August 3, 2020

Invermere, Kootenay Rockies

British Columbia is in Phase 3 of BC's Restart Plan

On June 24, 2020, it was announced that British Columbia is taking the next step in [BC's Restart Plan](#) with a gradual transition to Phase 3, including the smart, safe and respectful return of travel and tourism within the province.

While BC is in Phase 3 of the BC Restart Plan, and is not open to non-essential travel from the USA or International countries, information provided in this Roundup Report highlights not only local insights, but global insights which may be applicable to BC now.





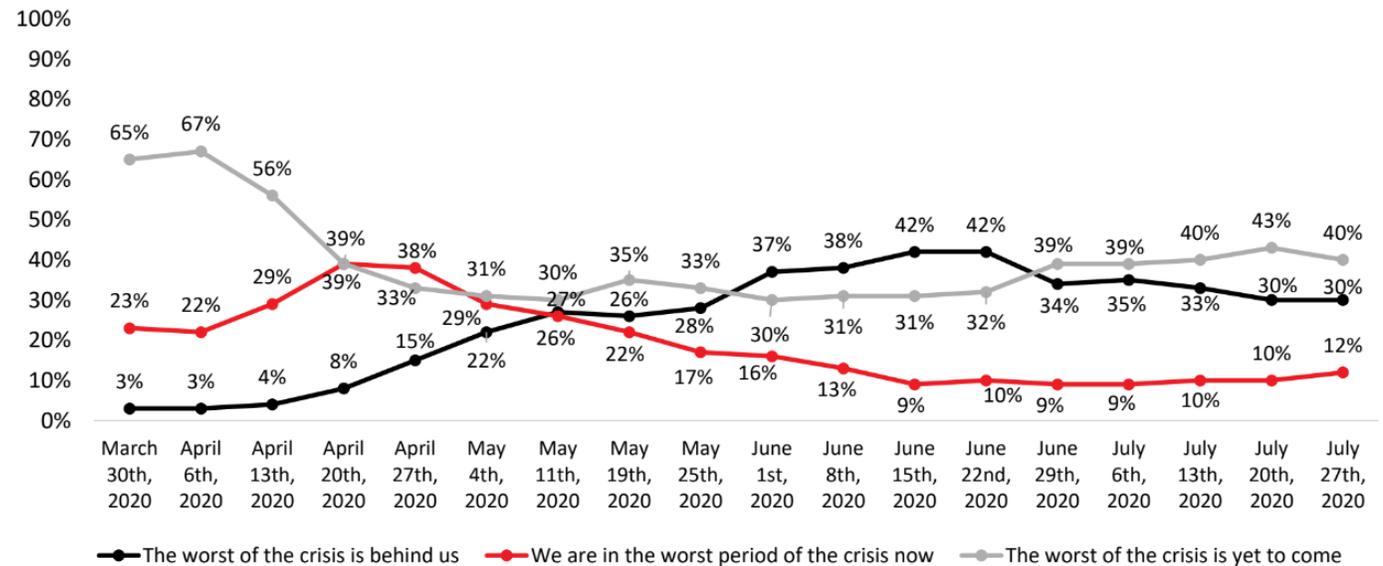
Destination BC is rounding up relevant research and articles each week related to the travel and tourism industry and COVID-19.

Last week in brief:

- More Canadians feel the worst of the crisis is yet to come
- UNWTO creates global tourism dashboard to follow pandemic response
- Scenario planning estimates \$21 billion in domestic travel potential
- BC residents' intentions to travel are greatest within the next 4 weeks
- Overnight stays were up in BC for 9 of the past 13 weeks
- Hotel occupancy and ADR continue to grow
- More Americans are planning road trips for the rest of 2020

More Canadians feel the worst of the crisis is yet to come

- Leger’s Weekly COVID-19 Survey, July 27, indicates that 40% of Canadians feel the worst of the pandemic crisis is yet to come, up from the 30% who held that opinion in June. Just 30% believe the worst of the crisis is behind us and 12% believe we are in the worst period right now.
- Mental health of Canadians have fluctuated between April and July, with ratings of good mental health higher in early May and June (44%-46%), however positive ratings of mental health have declined in the past few weeks, with 37% of Canadians indicating good mental health July 27.
- Currently, over half of Canadians are personally afraid of contracting COVID-19, with BC residents have the greatest fear (67%) compared to residents from other parts of Canada.



Source: [Leger’s Weekly Survey, July 27, 2020](#)

UNWTO creates global tourism dashboard to follow pandemic response

- The United Nations World Tourism Organization has created a global tourism dashboard which provides a broad array of statistics and insights on indicators for inbound and outbound tourism at a global, national and regional level for 220 countries.
- The new policy tracker outlines what different places around the world are doing to respond to the pandemic crisis.
- Categories of information include fiscal policy, monetary policy, jobs and skills, market intelligence, public-private partnerships, restarting tourism, domestic tourism and others.



Source: [COVID-19: Measures to Support Travel and Tourism, UNWTO, July 2020](#)

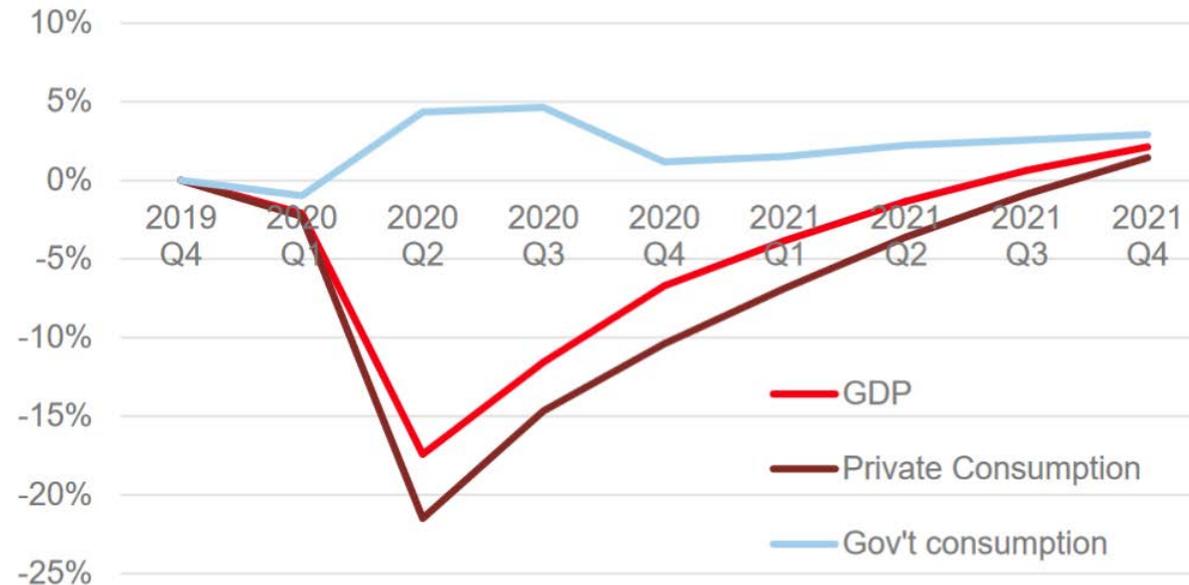


Scenario planning estimates \$21 billion in domestic travel potential in Canada

- Canada has one of the highest COVID-related government spending per capita to support recovery, which has buffered the economic impact of the lockdown.
- Destination Canada shared further analysis of new economic data and scenarios for the tourism industry at a national level. Scenario planning shows that, based on the \$27.7 billion Canadians spend on vacation trips in the US and overseas annually, the maximum potential redirected into domestic travel is \$21 billion (about 75%) across the country while the minimum is \$2.7 billion (10%).
- Destination BC's CEO, Marsha Walden, presented this research during the [July 23 Industry Call](#) (41:10-49:35). More details on the scenario can be found directly on Destination Canada's website.

Government spending
minimizing the impact of Covid-19 on the economy

Index (2019 Q4 = 100)



Source: Oxford Economics

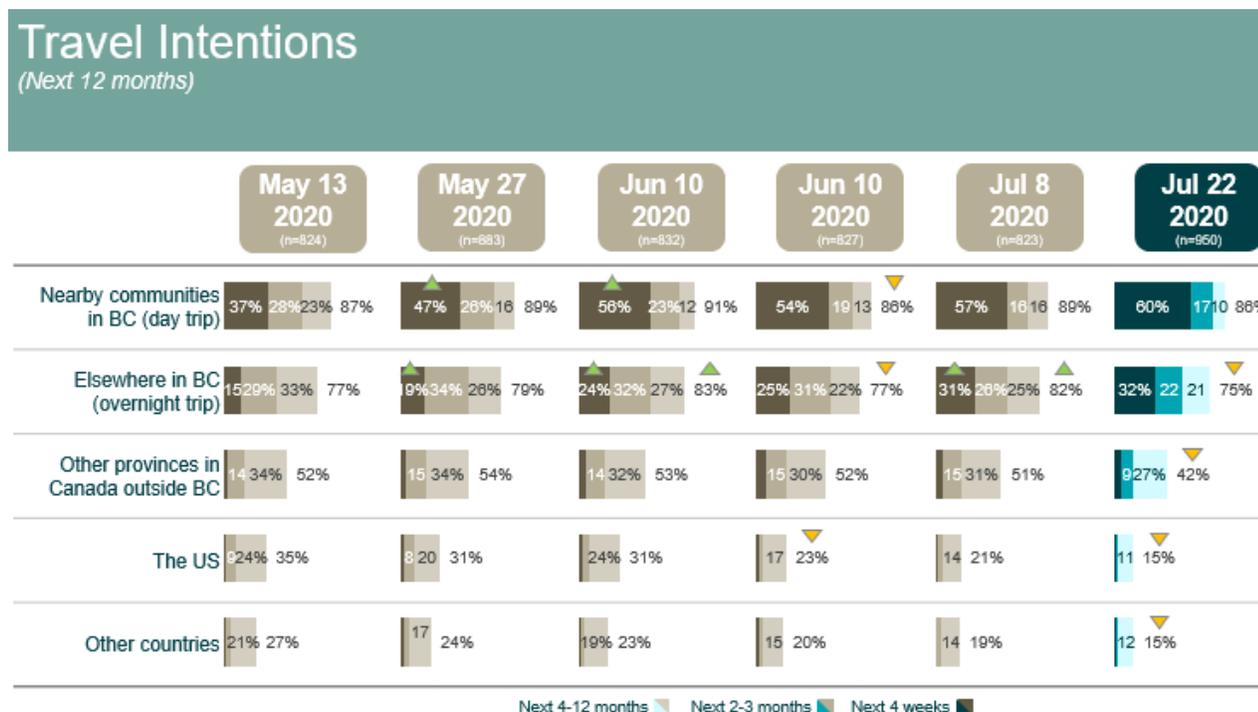


Source: [Destination Canada Visitor Demand Forecast \(July 2020 Update\)](#)



BC residents' intentions to travel are greatest within the next 4 weeks

- Destination BC's Resident's Public Perceptions Bi-Weekly Survey, Wave 6, shows that BC residents' likelihood to travel to other provinces in Canada, over the next 3 months, continues to be low and a decline in intention to travel. Likelihood to travel to the US or to other countries is even lower and has also declined.
- However, locally, 77% of BC residents anticipate taking a day trip to a nearby community in BC in the next 3 months, with 60% of those being within the next 4 weeks.
- And intentions to travel elsewhere in BC for an overnight trip, over the next 4 weeks, have more than doubled since May from 15% to 31%.
- Sentiment of BC residents' intentions to travel and comfort of welcoming visitors into their community can be found in the full report, including insights by demographics and place of residence.

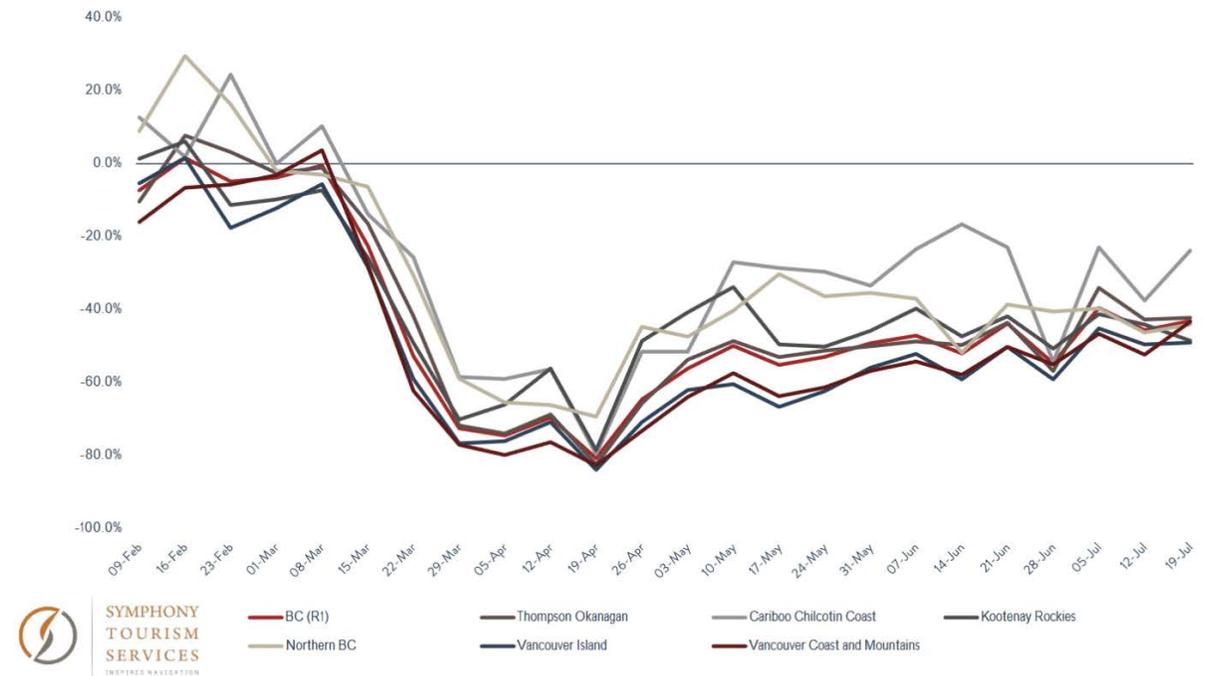


Source: [Destination BC's BC Resident's Public Perceptions: COVID-19 Travel and Tourism Wave 6, Insights West, July 27, 2020](#)

Domestic overnight visitors up in BC for 9 of the past 13 weeks

- As reported by the British Columbia Regional Tourism Secretariat, domestic overnight visitors moving throughout BC is down compared to 2019, however, upward trends in movement and overnight stays were apparent for nine of the past 13 weeks based on Environics Analytics mobility data.
- All tourism regions in BC, with the exception of the Kootenay Rockies, saw an increase in visitation from week 23 (July 6-12) to week 24 (July 13-19).
- Year-over-year variations for each of the six tourism regions in BC can be found in the full report.

Domestic Overnight Visitors - Year over Year Variation
For period of February 4 - July 19, 2020



SYMPHONY
TOURISM
SERVICES
INSPIRED NAVIGATION

BC (R) Thompson Okanagan Cariboo Chilcotin Coast Kootenay Rockies
Northern BC Vancouver Island Vancouver Coast and Mountains

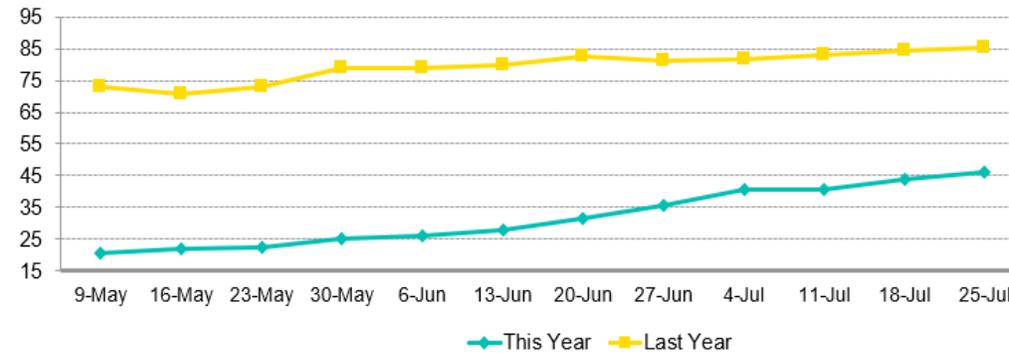
Source: [Measuring Canadian Travel Patterns, July 19, 2020, British Columbia Regional Tourism Secretariat](#)



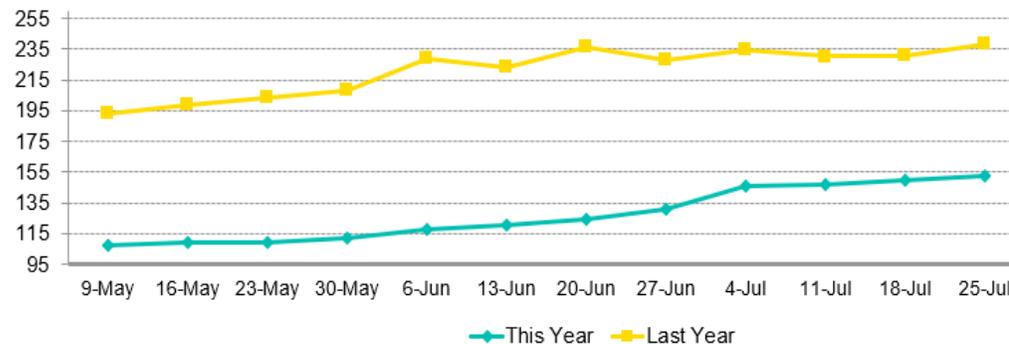
STR Hotel occupancy and ADR continue to grow

- STR, an agency which captures hotel occupancy and ADR, reports a continued, steady rise in BC hotel performance, week after week.
- Compared to July 12-18, BC's hotel occupancy for the week of July 19-25 was 46.1%, an increase of 2.5 points.
- Year-over-year remains down compared to the same period last year (July 19-25) (-45.9%).
- During the same week, BC's hotel performance of ADR was \$152, down -36% from the same period last year.
- These insights from STR and more can be found in the Signals & Sentiment dashboard located on the Destination BC COVID-19 Hub, under [Destination BC Response Signals & Sentiment Dashboard](#) tab.

Weekly Occ (%) - May 09, 2020 to Jul 25, 2020



Weekly ADR - May 09, 2020 to Jul 25, 2020

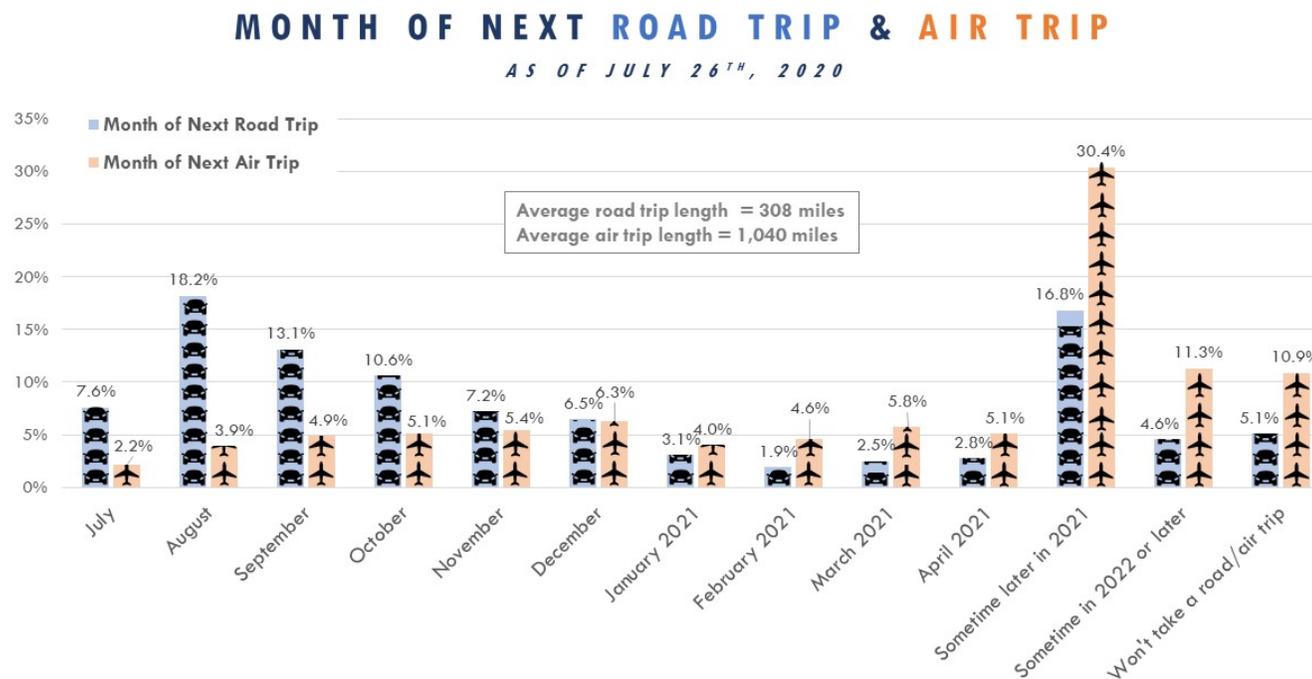


Source: [2020 STR, STR Global, Ltd](#)



More Americans are planning road trips for the rest of 2020

- Americans are increasingly excited for near-term travel and openness to travel inspiration. Nearly one fifth (18%) of American travellers are anticipating taking a road trip in August. Nearly a third (30%) expect to travel by air later in 2021.
- Americans who recently travelled by air found the health and safety protocols of airlines and airports to be largely satisfactory.
- Over half of American travellers are not currently interested in travel, especially baby boomers and those living in the west and northeast.



Questions: 1. In what month do you expect you will take your NEXT ROAD TRIP (Traveling in a personal automobile)? 2. In what month do you expect you will take your NEXT TRIP on a commercial airline?

Destination Analysts





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