



DESTINATION
BRITISH COLUMBIA®

COVID-19 Research Roundup

August 10, 2020

Stanley Park, Vancouver, Coast & Mountains

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:

- Wave 7 of BC's Resident's Public Perceptions coming soon
- BC residents are significantly more welcoming for visitors from BC and Canada
- BC's hotel occupancy continues to grow as reported by STR
- More time is spent in parks, less time on retail and recreation within BC
- Airline bookings to BC declined last week
- Most airline searches in Canada are for international travel
- Fewer Americans happy to see tourism ads for their community
- 40% of global destinations have loosened travel restrictions
- COVID-19-related tourism health & safety headlines from around the world

Wave 7 of BC's Resident's Public Perceptions coming soon

- A reminder that Destination BC's Resident's Public Perceptions Survey is a bi-weekly tracking study.
- Wave 6 of this study, for results captured up to July 22, is available on the [Destination BC COVID-19 Hub](#), under [Destination BC Response, Research & Insights](#).
- Wave 7 of this study will be available soon, providing new insights up to August 5.
- This research differs from Destination Canada's Weekly Resident Sentiment in that it captures not only concerns of welcoming visitors to the province, but also travel intentions and comfort in participating in various travel-related activities and modes of transportations.
- The full report also captures results by demographics and place of residence.

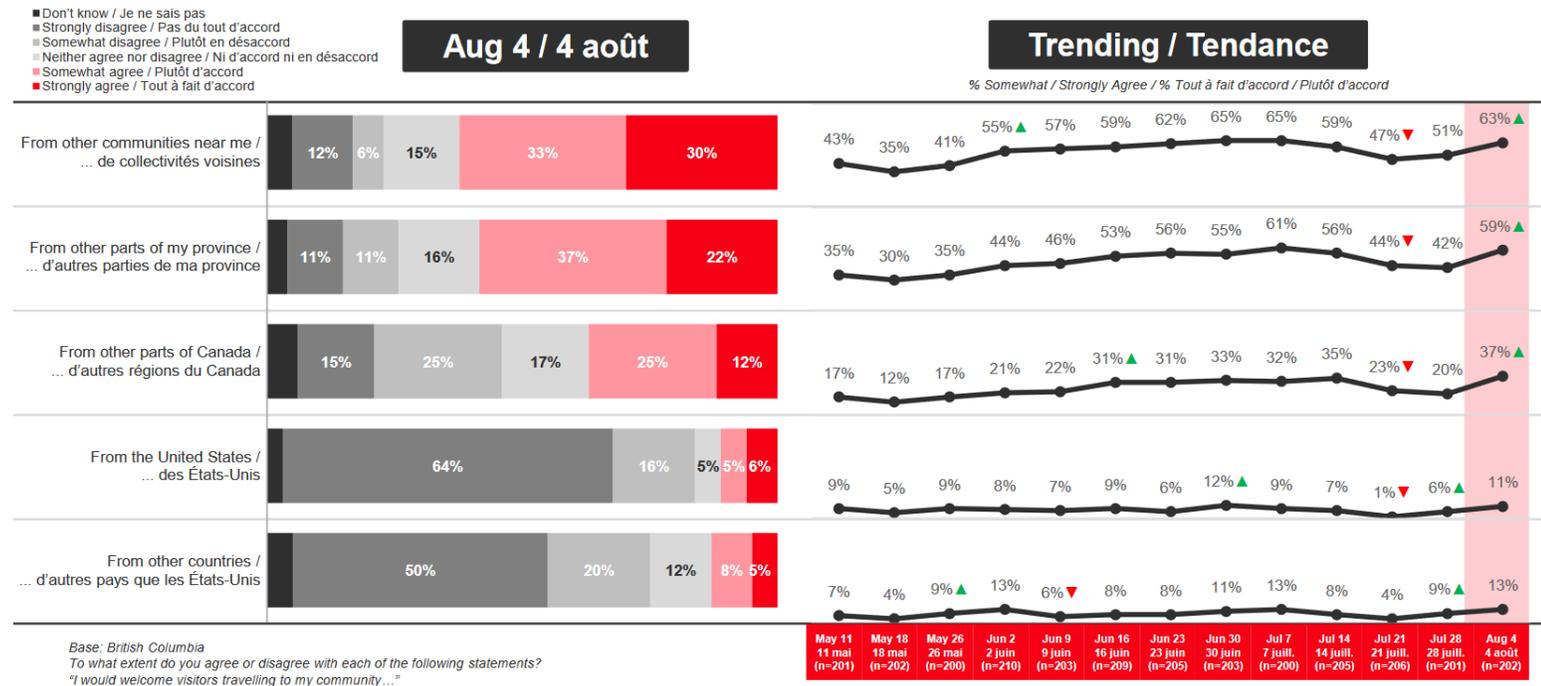


Source: [Destination BC's BC Resident's Public Perceptions: COVID-19 Travel and Tourism Wave 6, Insights West, July 27, 2020](#)

BC residents are significantly more welcoming of visitors from BC and Canada

- Destination Canada's Weekly Resident Sentiment Wave 13 report shows the level of welcome from BC residents towards all levels of domestic visitors has increased significantly, reverting to levels seen at the end of June and early July.
- 63% of residents would welcome visitors from nearby communities, 59% from other parts of BC, and 37% from other parts of Canada.
- Sentiment of BC residents' comfort of welcoming visitors into their community overall, by urban/rural comparison, and by province can be found in the full report.

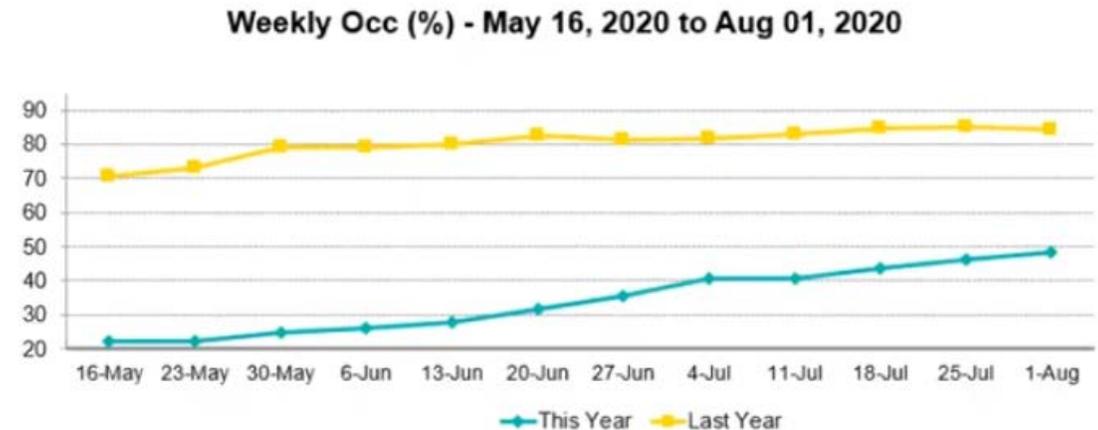
British Columbia / Colombie-Britannique



Source: [Destination Canada's Weekly Resident Sentiment, Wave 13, Leger, August 4 2020](#)

BC's hotel occupancy continues to grow as reported by STR

- STR, an agency which captures hotel occupancy and ADR, reports a continued, steady rise in BC hotel performance, week after week.
- BC's hotel occupancy for the week of July 26-Aug 1 was 48%. While year-over-year remains down (-42%) compared to the same period last year (July 28-Aug 3), this represents a positive increase of 2.1 points from the previous week.
- The average occupancy rate for the City of Vancouver was 26% (up 3.4 points from the previous week), Kelowna 74% (up 2.1 points), Kamloops 60% (up 5.8 points), Victoria 40% (up 1.1 points), Whistler 56% (up 2.1 points), and Richmond 40% (up 0.4 points)
- 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.



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

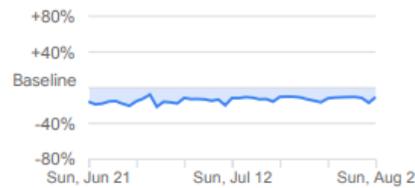


More time is spent in parks, less time on retail and recreation within BC

- According to Google mobility data, within BC, 11% less time was spent doing retail and recreational activities as of August 1, compared to a baseline of the first five weeks of the year.
- Likely in part due to weather, during the week of August 1, more time was spent in parks (191%) compared to the baseline of the first five weeks of the year. Compared to the week prior, this is up 26%.

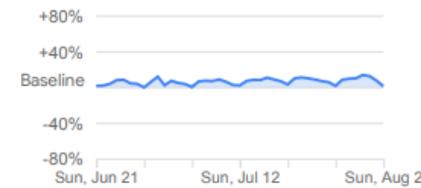
Retail & recreation

-11% compared to baseline



Grocery & pharmacy

+2% compared to baseline



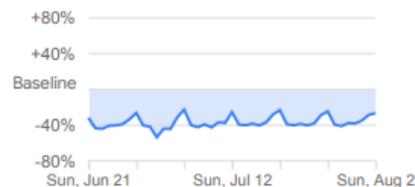
Parks

+191% compared to baseline



Transit stations

-27% compared to baseline



Workplaces

-18% compared to baseline



Residential

+0% compared to baseline



Source: [COVID-19 Community Mobility Report, Google, August 2nd, 2020](#)

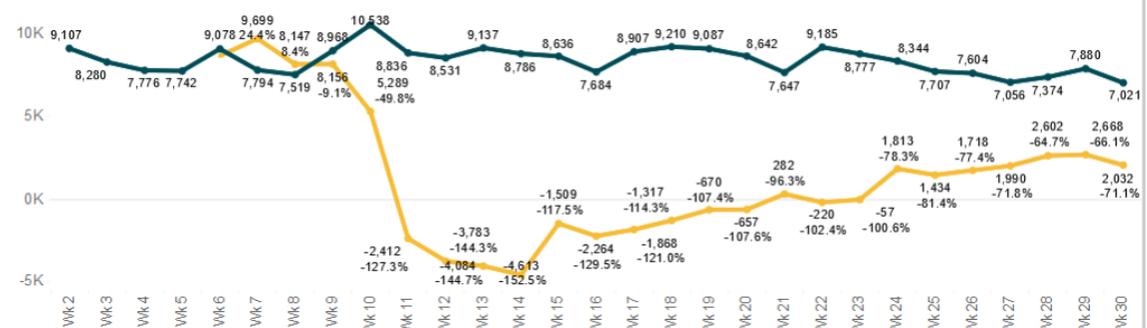
Airline bookings to BC decline

- ForwardKeys, a flight analysis company, has shown that airline bookings made to BC declined last week to 2,032 from 2,668 the week before.
- Arrivals to BC by month remain far below 2019 levels.
- These insights from ForwardKeys 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.

TRAVELER BOOKINGS

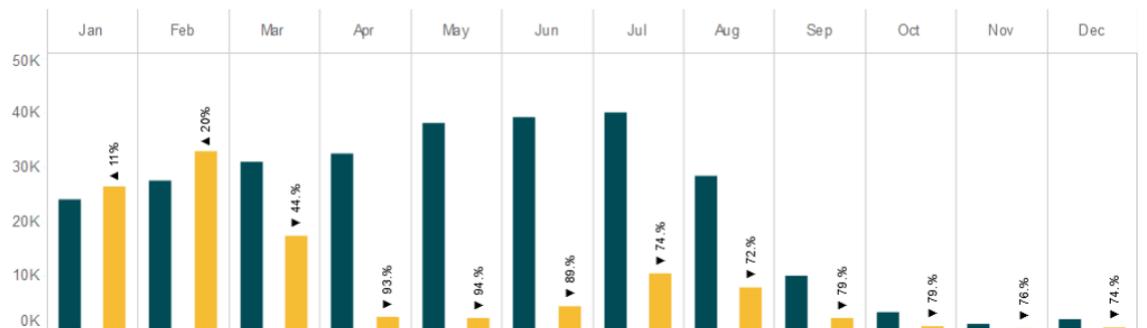
Airline Bookings Made to BC by Week

Source: ForwardKeys © Forward Data SL



Arrivals to BC by Month

Source: ForwardKeys © Forward Data SL



Source: [ForwardKeys, Signals & Sentiment Dashboard, Destination BC](#)

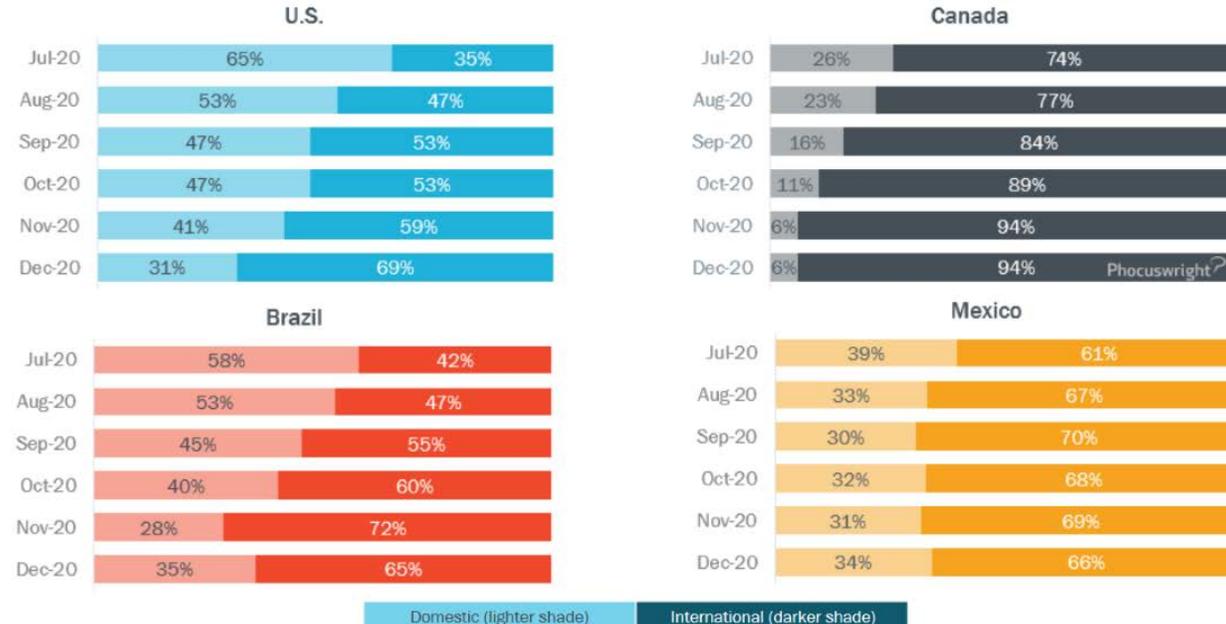


Most airline searches in Canada are for international travel

- Phocuswright’s Global Air Trends report states that online airline searches for Canada trend sharply towards international, in contrast to searches made by the US, Brazil, and Mexico.
- The top 5 International Destinations for the Canadian market are China, USA, UK, France and Hong Kong.
- The report shows the Canada is in the top 5 International Destination for Mexico (#2) and China (#5).
- The top 5 International Destination for the US market are Mexico, China, UK, Japan and Spain.
- More context for the report is available from the Phocuswright Podcast: [InPhocus Episode 19](#)

The Americas – Monthly Airline Searches

Share by Destination, July – December 2020



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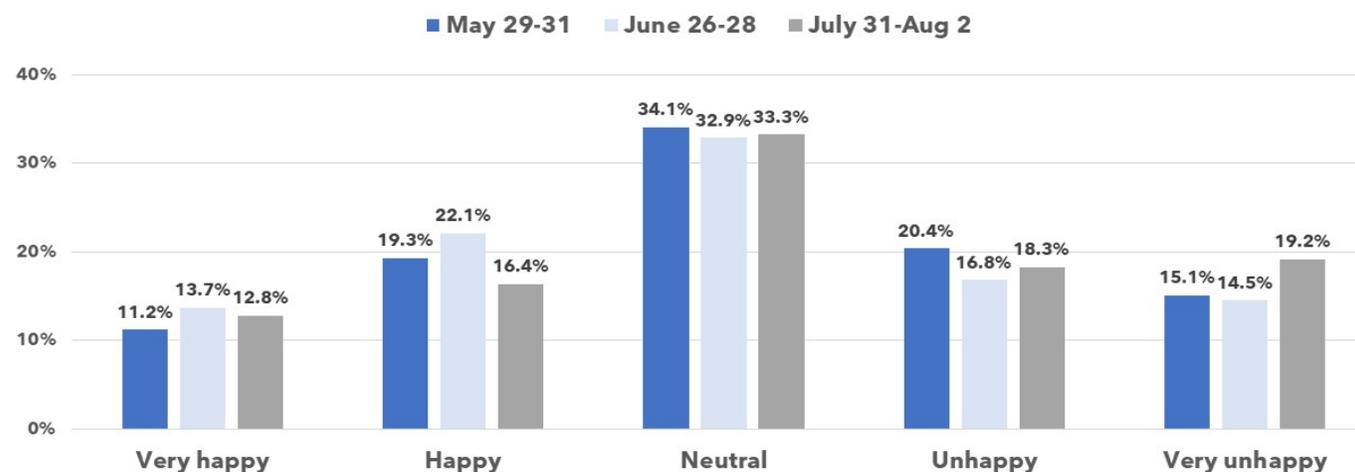
Source: [Global Air Trends, Phocuswright, July 2020](#)



Fewer Americans happy to see tourism ads for their community

- 29% of Americans would be happy to see their community promoted for tourism when safe, down from 36% at the end of June.
- Almost a third of American travellers are less likely to visit American destinations most associated with coronavirus, even after the end of the pandemic.
- 49% of American travellers have leisure trip plans in 2020.

HAPPINESS WITH SEEING A TOURISM AD FOR OWN COMMUNITY: MAY – JULY



QUESTION: HOW WOULD YOU FEEL IF YOU SAW AN ADVERTISEMENT TODAY PROMOTING YOUR COMMUNITY AS A PLACE FOR TOURISTS TO COME VISIT WHEN IT IS SAFE?

*(Base: All respondents, 1,200, 1,206 and 1,224 completed surveys.
Data collected May 29-31, June 26-28, July 31-Aug 2, 2020)*

Destination  Analysts
DO YOUR RESEARCH

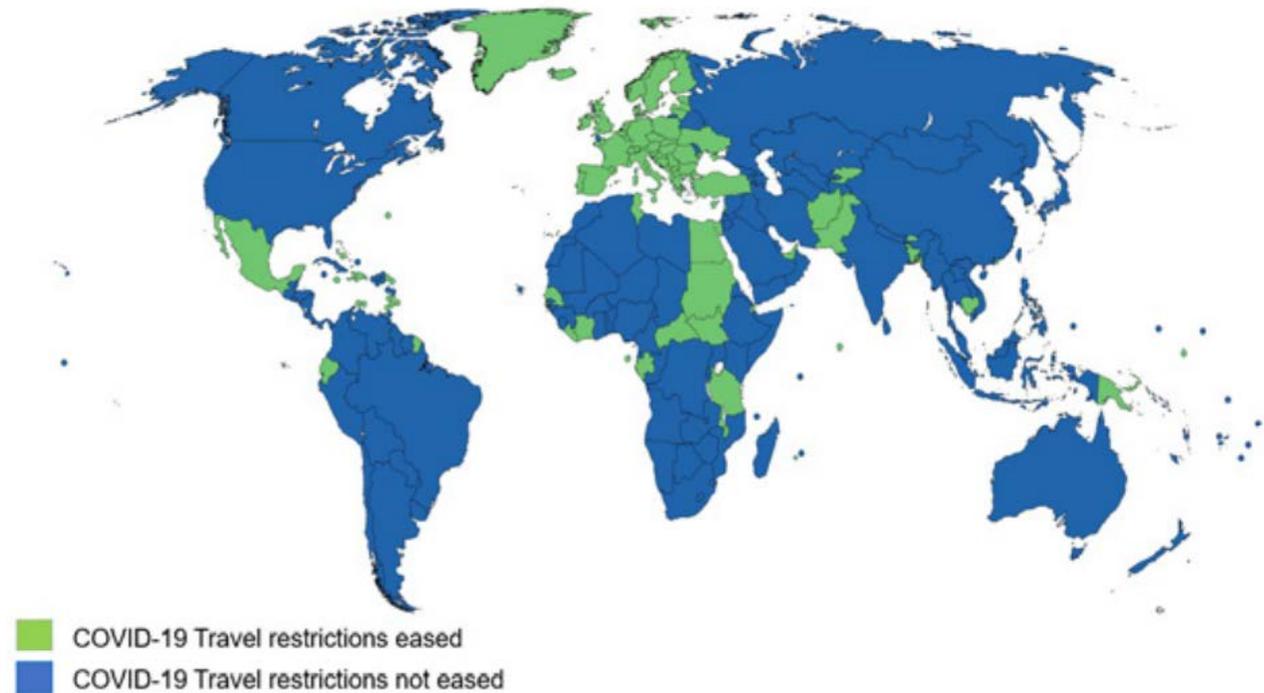


Source: [American Travel in the Period of Coronavirus, Destination Analysts, Aug 3rd, 2020](#)

40% of global destinations have loosened travel restrictions

- As of July 19, 40% of the 115 destinations worldwide captured in UNWTO's Global Review For Tourism, had eased travel restrictions, up from 22% as of June 15.
- Four destinations have lifted all restrictions: Albania, Maldives, Serbia and Tanzania.
- 20 of the 87 destinations that have eased restrictions recently are Small Island Developing States, many of which depend on tourism for economic growth and employment.
- Approximately half (41) of all those destinations are in Europe.

Figure A – Destinations that have eased COVID-19 related travel restrictions as of 19 July 2020



Source: [UNWTO, COVID-19 Related Travel Restrictions – A Global Review For Tourism, July 30, 2020](#)



COVID-19-related tourism health & safety headlines from around the world

- Southwest Airlines is no longer wiping down arm rests and seat belts after each flight. [Source](#)
- About half of German, British, and French travellers would skip their vacation instead of taking a test, wearing a mask outdoors, or quarantining after. [Source](#)
- Singapore is now requiring travellers to wear electronic tags to enforce quarantine. [Source](#)
- Air Emirates has committed to covering the cost of COVID-19-related medical expenses for anyone travelling abroad through the airline. [Source](#)



Source: [Coronavirus and the Travel Industry, Skift](#)

57% of tourism businesses' digital transformation plans will be significantly affected by COVID-19

- Skift and Amazon Web Services surveyed almost 1,000 global travel industry executives on the topic of digital transformation. 43% of respondents said their digital strategies are focusing on digital analytics the most, ahead of front-end customer experience (42%), e-commerce (41%), and mobile (40%).
- Top business priorities for 2020 included high-quality customer experiences (61%), growing traveller/guest base (60%), deepening existing customer relationships (58%), and increasing customer retention (54%).
- Only 10% said COVID-19 would have no impact on their business's digital transformation plans, while 57% said it would have a large/significant impact. 20% of businesses said they are behind when it comes to competing in a digital world.
- Before COVID-19, digital transformation investment was estimated to reach \$7.4 trillion between 2020 and 2023. This number is expected to increase due to the pandemic.

Source: [2020 Digital Transformation Report, Skift](#)

Thinking about your overall digital strategy, which of the following areas will you be focusing on most over the 12 months?





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This report can be found online on the Destination BC COVID-19
Research & Insights webpage: [link](#)

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