



# COVID-19 Research Roundup

September 14, 2020



New Denver, 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.*

On August 14, 2020, Canadian and US officials agreed to keep the border between the two countries closed to non-essential travel until September 21, 2020.

While BC is in Phase 3 of the BC Restart Plan, and is not open to non-essential travel from the US or International countries, information provided in this Research 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:

- BC residents' intentions to travel in the next 4 weeks have decreased
- BC's overall domestic overnight visitation increases from previous week; first week-over-week increase since end of July
- BC's overall domestic overnight visitation increases year-over-year for first time since mid-February
- BC hotel ADR dropped -28.2% year-over-year for the week of Aug 20-Sep 5
- Once again, BC sees the most airline bookings since the pandemic began
- Over a third of Americans took a leisure trip over the summer
- Two-thirds of global travellers want to start planning a trip within 3 months of restrictions being lifted
- Google data shows Canada is the second most popular country in the world for 2021 travel
- 53% of destinations worldwide have eased COVID-19 travel restrictions
- 60% of Canadians think another pandemic lockdown is likely
- European travellers are more concerned with a decrease in destination infections than a vaccine becoming available
- Tourism and COVID-19 dashboard and reporting resources

# BC residents' intentions to travel in the next 4 weeks have decreased

- Compared to Wave 8, BC residents' intentions to travel in the next 4 weeks has decreased from 65% to 60% to surrounding areas for a day trip, and from 38% to 31% to other parts of the province for an overnight trip. This is understandable as BC residents' travel normally decreases during the Fall.
- BC residents' concern for welcoming both domestic and international visitors remained stable between Wave 8 and Wave 9.
- Compared to the rest of the province, Vancouver Island residents tend to be more concerned about welcoming residents from elsewhere in BC (63% concerned) and from other parts of Canada (84% concerned).



Base: All respondents  
 D3. When, if at all, are you likely to make trips to the following destinations?

▲ Statistically significantly higher than previous wave.  
 ▼ Statistically significantly lower than previous wave.

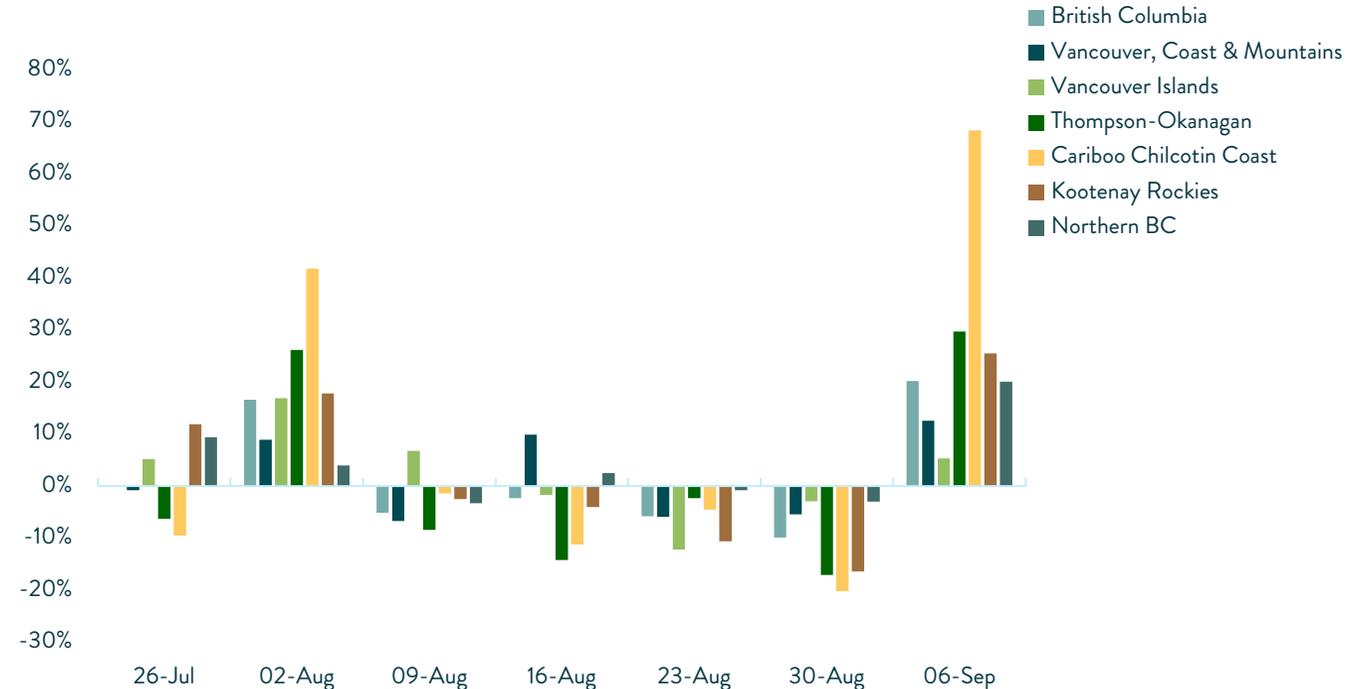
Source: [Destination BC's BC Residents Public Perceptions: COVID-19 Travel and Tourism Wave 9, Insights West, September 9, 2020](#)



# BC's overall domestic overnight visitation increases from previous week; first week-over-week increase since end of July

- According to Environics Analytics Weekly COVID Tracker Report, during the week ending September 6, BC experienced a week-over-week increase in domestic overnight visitation for the first time since the end of July (up +20.2% from the previous week). Labour Day weekend likely contributed greatly to the movement seen across the province and across Canada. .
- All areas around the province saw increases in domestic overnight visitation during the week ending September 6 (compared to the week prior) due to the Labour Day weekend:
  - Cariboo Chilcotin Coast (+68.4%)
  - Thompson Okanagan (+29.7%)
  - Kootenay Rockies (+25.5%)
  - Northern BC (+20.1%)
  - Vancouver, Coast & Mountains (+12.6%)
  - Vancouver Island (+5.3%)

BC's Domestic Overnight Visitation  
Week-over-Week Variation



Source: [Environics Analytics Weekly COVID Tracker Report, September 6, 2020](#)

# BC's overall domestic overnight visitation increases year-over-year for first time since mid-February

- Environics Analytics also reports year over year analysis in the Weekly COVID Tracker Report. During the week ending September 6, BC experienced a year-over-year increase in domestic overnight visitation for the first time since mid-February (+2.6% compared to the same week in 2019). This is likely attributed to the period in which Labour Day weekend fell into in 2020 vs. 2019.
- While year-over-year increases in visitation were not seen in Vancouver, Coast and Mountains (-10.2%) or Vancouver Island (-12.6%), all other areas of the province did see an increase in visitation (week ending September 6 compared to the same period in 2019):
  - Cariboo Chilcotin Coast (+59.9%)
  - Thompson Okanagan (+15.2%)
  - Kootenay Rockies (+15.2%)
  - Northern BC (+8.6%)

BC's Domestic Overnight Visitation  
Year-over-Year Percent Change

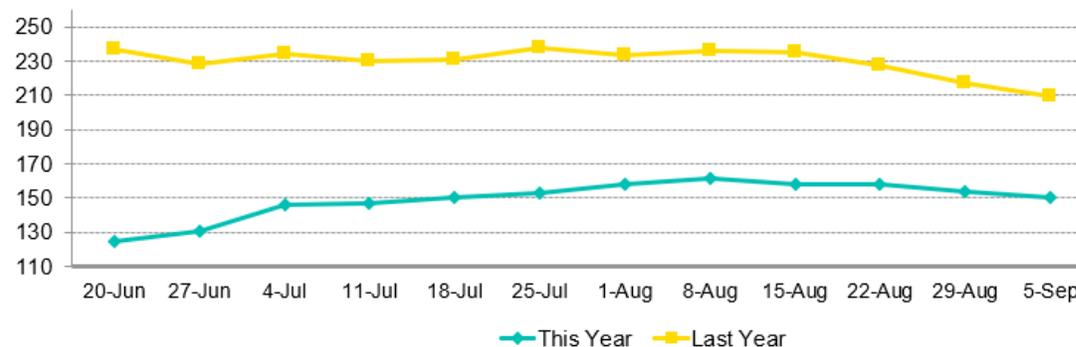


Source: [Environics Analytics Weekly COVID Tracker Report, September 9, 2020](#)

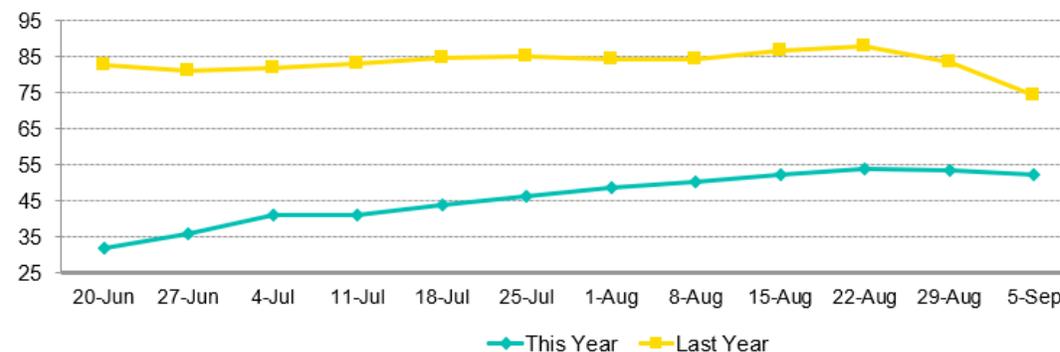
# BC hotel ADR dropped -28.2% year-over-year for the week of Aug 20-Sep 5

- STR, an agency which captures BC hotel performance, shows the average weekly ADR for BC was \$150.22 for the week of August 30 - September 5, 2020, which represents a -28.2% change year-over-year (September 1 - September 7, 2019).
- Of the six cities tracked, the City of Vancouver saw the greatest year-over-year decline of ADR at -46.0%, followed by Richmond (-33.8%), Victoria, (-23.8%), Kamloops (-12.2%), Whistler (-9.7%), and Kelowna (-5.8%).
- BC hotel occupancy was 52.3% during the week of August 30 - September 5. This represents a decrease of 0.2 points from the previous week and a decrease of -21.7 points compared to the previous year.

**Weekly ADR - Jun 20, 2020 to Sep 05, 2020**



**Weekly Occ (%) - Jun 20, 2020 to Sep 05, 2020**



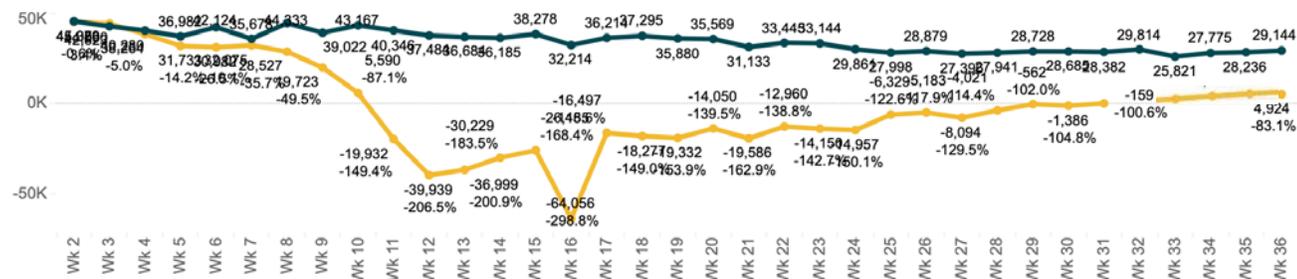
Source: [2020 STR, STR Global Ltd](#)

# Once again, BC sees the most airline bookings since the pandemic began

- Forward Keys, a flight analysis company, has shown in the week of August 31, 2020, there were 4,924 airline bookings made to BC. While this is an 83% decrease from the same time period last year, it continues a trend of positive week-over-week growth and is the highest number of bookings since the pandemic began.
- Arrivals to BC by month for April to September have seen a year-over-year difference of over -90% each month.
- 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.

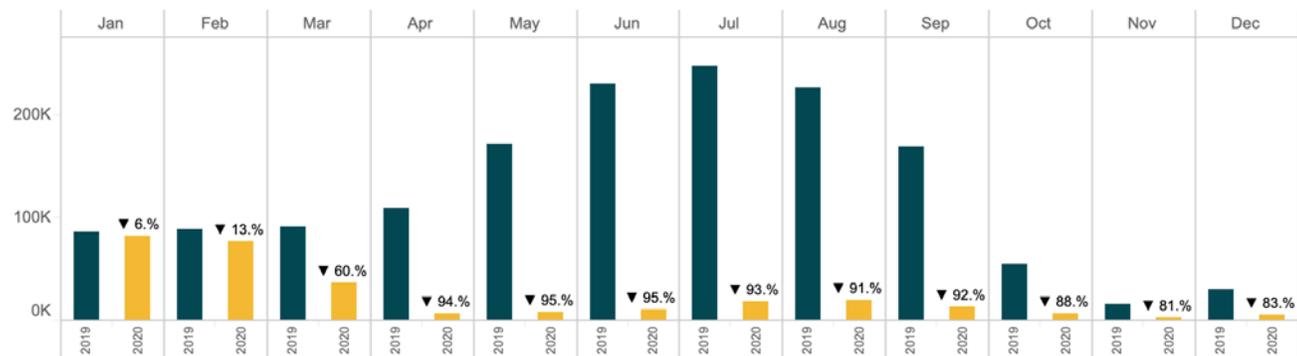
## Airline Bookings Made to BC by Week

Bookings Made to BC by Week; negative values indicate more cancellations than bookings in a given week. Please hover over data points to see more information. Source: ForwardKeys



## Arrivals to BC by Month

Arrivals by Month, based on current bookings, with Year-over-Year difference displayed as a percentage. Please note: comparison is made on bookings made during the same time period last year, and does not portray total arrivals to BC, especially in more distant time periods. Source: ForwardKeys



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



# Over a third of Americans took a leisure trip over the summer

- Destination Analytics reports that from June 1 to September 6, 35% of Americans took a leisure trip, 26% took a staycation, and 8% travelled for a business trip.
- Of those Americans who travelled, 49% stated their trip made them more confident that they can safely travel during the COVID-19 crises.
- Of Americans who travelled by plane during their summer travel trip, 53% stated they had safety concerns regarding the Coronavirus while onboard the airplane.
- 51% of Americans are excited to travel, down slightly from 53% last week.

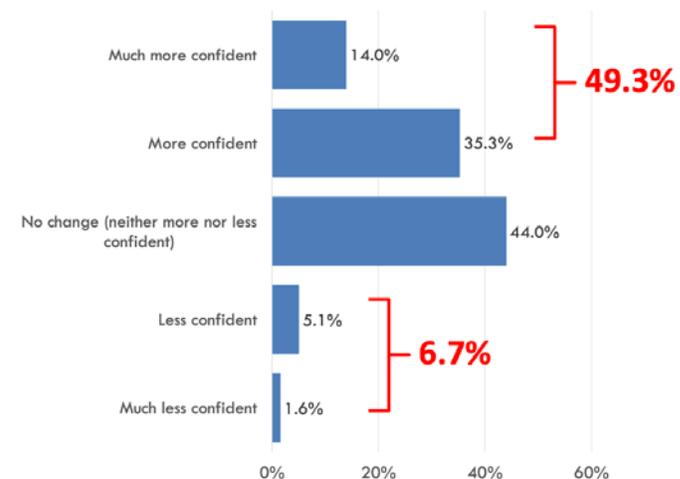
## HOW AMERICANS TRAVELED IN THE SUMMER OF COVID-19 JUNE 1 – SEPTEMBER 6



**Question:** Did taking this trip make you more or less confident that you can travel safely in the time of the Coronavirus? (Select one)

**My experiences on my most recent leisure trip have made me \_\_\_\_\_ I can travel safely.**

(Base: Wave 26 data. Respondents taking a summer leisure trip, 416 completed surveys. Data collected September 4-6, 2020)



Source: [Coronavirus Travel Sentiment Index Report, Destination Analysts, September 7, 2020](#)

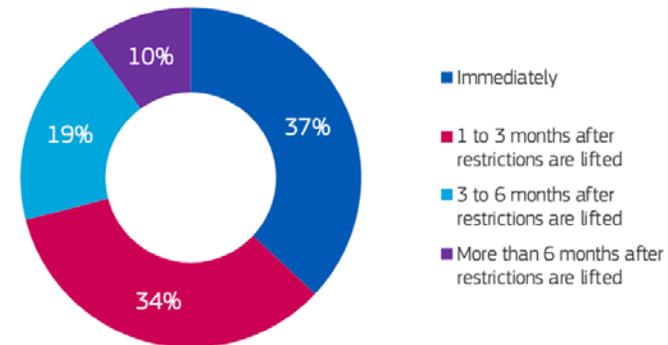


# Two-thirds of global travellers want to start planning a trip within 3 months of restrictions being lifted

- A new study, compiled by Amadeus, shows that 71% of global travellers will likely start planning their next trip within three months of COVID-19 travel restrictions being lifted.
- The same study showed that 52% of global travellers stated visiting friends or family would be the primary reason for their next leisure trip, whereas 40% state that going somewhere unfamiliar would be the primary reason.
- 70% of global travellers expect to have the same or more budget for their future holidays.

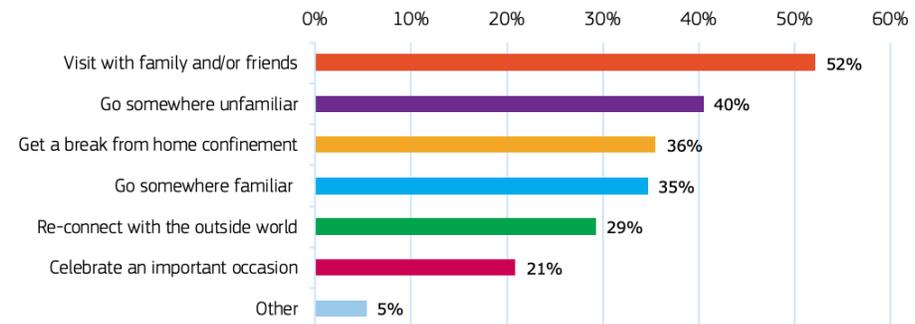
**Question: How long are you considering to wait, once the travel restrictions are lifted, to start planning your next trip?**

Respondents n=5,785



**Question: What reasons would cause you to plan and book LEISURE travel in the coming months?**

Respondents n=5,785



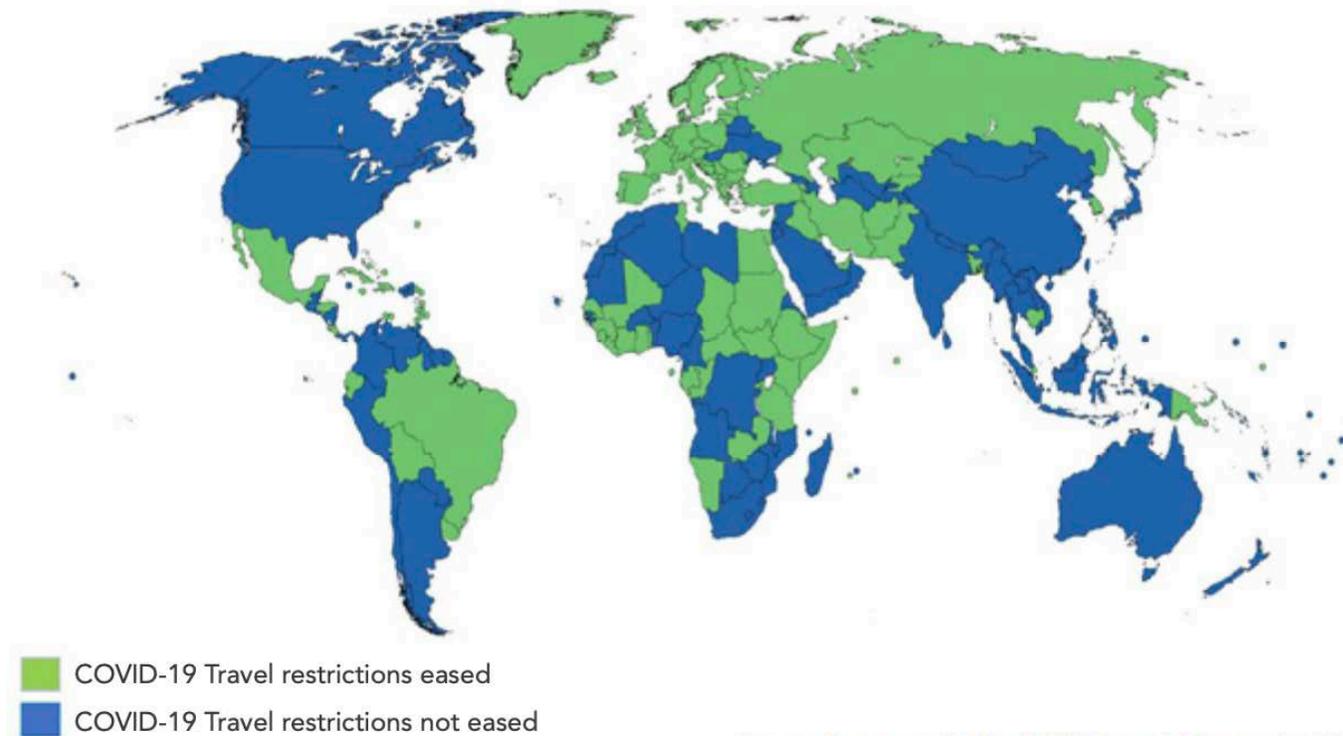
Source: [Destination X Where To Next Study: What Leisure Travellers Want In A COVID-19 World Study by Amadeus](#)



# 53% of destinations worldwide have eased COVID-19 travel restrictions

- According to the UNWTO, as of September 1 2020, 115 or 53% of destinations worldwide have eased COVID-19 related travel restrictions for international tourism. This is an increase of 28 destinations compared to July 19.
- Of the destinations which have eased travel restrictions, currently 56% have partial opening of borders, and a further 30% have destination-specific travel restrictions. Only 2% have no COVID-19 travel restrictions.
- Both Canada and the United States have not eased COVID-19 international travel restrictions.

Figure A – Destinations that have eased COVID-19 related travel restrictions as of 1 September 2020



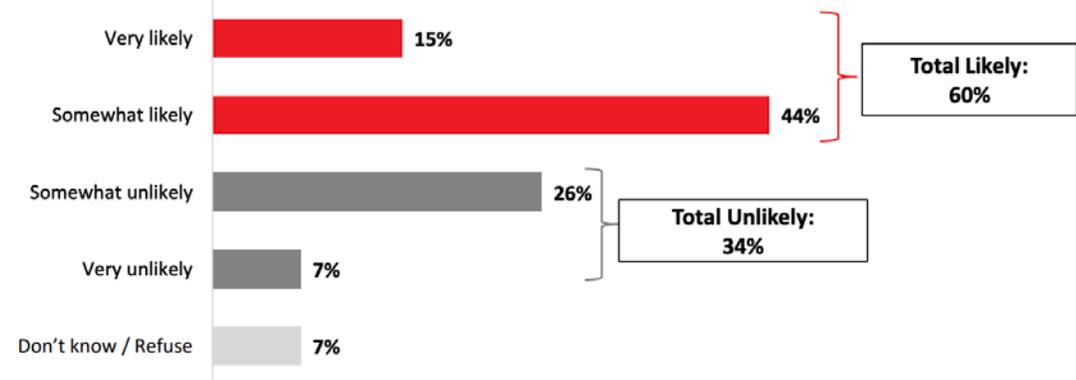
Source: Data compiled by UNWTO as of 1 September 2020.

# 60% of Canadians think another pandemic lockdown is likely

- A weekly surveys, conducted by Leger on Canadians and American perspectives towards current events, shows that 60% of Canadians believe it is very or somewhat likely that, over the next three months, we will return to a pandemic lockdown with business closures and stay-at-home-orders.
- This same survey showed that 40% of Canadians rate their mental health, since the beginning of the COVID-19 crises, as excellent or very good, with another 43% rating it as good.
- Currently, 56% of Canadians state they are personally very afraid or somewhat afraid of contracting COVID-19.

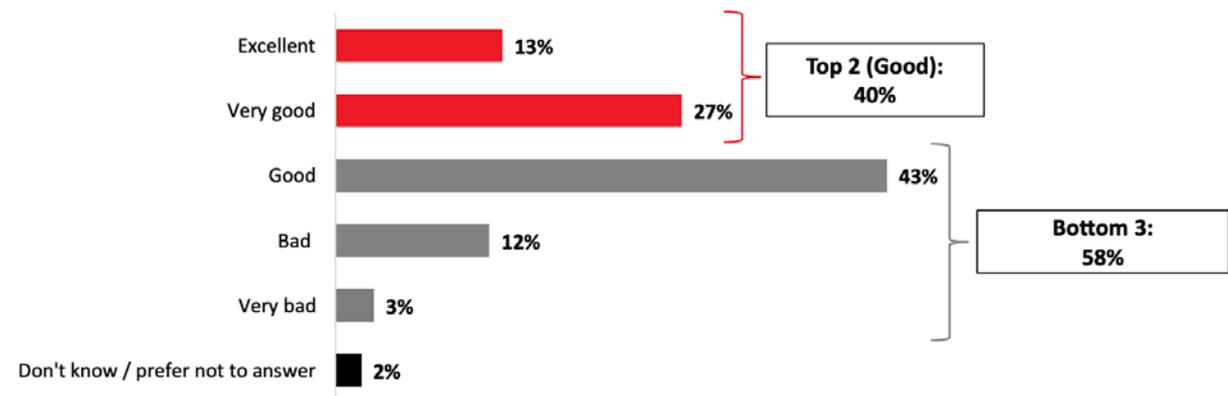
**CTC184. In your view, what is the likelihood that, over the next three months, we will go back to a pandemic lockdown, with business closures and stay-at-home orders (similar to March and April)?**

Base: All respondents (n=1,529)



**CTC46. Since the beginning of the COVID-19 crisis, how would you rate your mental health?**

Base: All respondents (n=1,529)

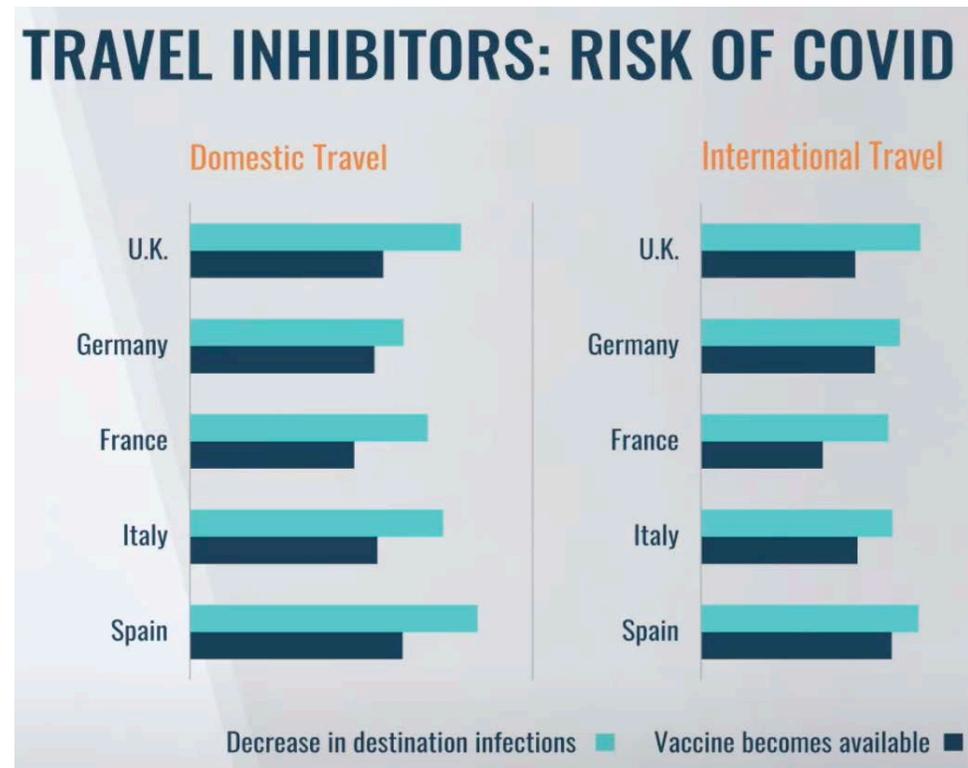


Source: [Leger Weekly Survey on Canadian and American perspectives on current events, September 8<sup>th</sup>](#)



## *European travellers are more concerned with a decrease in destination infections than a vaccine becoming available*

- Phocuswright, a tourism research organization, reported that amongst European travellers, a decrease in destination infections is a bigger factor than vaccine availability in encouraging both domestic and international travel.
- 52% of UK travellers who want to make a trip within the next year would like to leave Europe. This is a higher percentage willing to leave the continent than other European countries such as Germany (42%), France (40%), Spain (34%), and Italy (32%).



Source: [The Path To Recovery In Travel's Next Era Study by Phocuswright Research, September 2020](#)

## *Tourism and COVID-19 dashboard and reporting resources*

- The UNWTO has an [online dashboard of international statistics](#) on the impact of COVID-19 on the tourism sector.
- MPI has created a [coronavirus resource page](#) that pulls together meetings and events information as well as links to several other resources helpful to the Business Events segment in our sector.
- Skift has a live roundup of [coronavirus-related tourism news](#), as well as a [global travel reopening timeline](#).
- The BC Tourism Resiliency Network hosts [tourism impact reports and travel pattern studies](#).
- Destination BC uses a [Signals & Sentiment dashboard](#) to follow core markets and inform their approach through COVID-19.
- Destination BC also hosts [general research and insights](#) on their website.
- The Travel and Tourism Research Association links to many [research & analytics companies](#) on their COVID-19 Resource Centre.





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

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