



COVID-19 Research Roundup

September 28, 2020

Mount Edziza Provincial Park, Northern BC

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 September 18, 2020, Canadian and US officials agreed to keep the border between the two countries closed to non-essential travel until at least October 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:

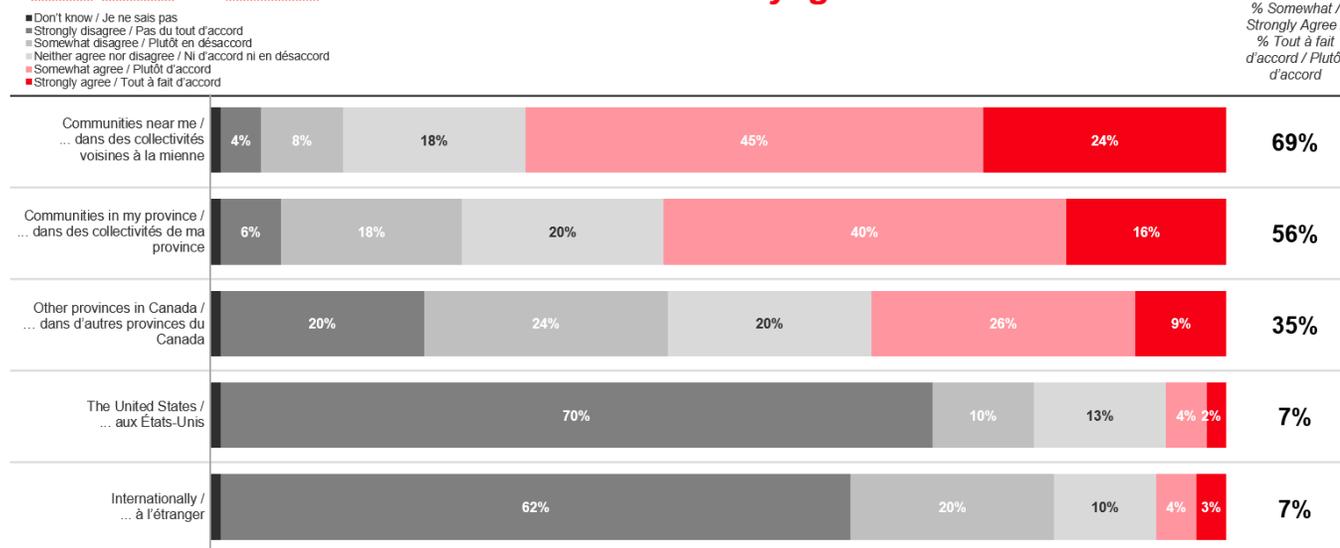
- 69% of BC residents feel somewhat safe travelling to nearby communities
- BC residents' intention to travel remain unchanged from previous wave
- September searches for travel in BC drop dramatically
- BC hotel ADR dropped 38% year-over-year for the week of Sept 13-19
- Following Labour Day Weekend, visitation remains down for two consecutive weeks across BC
- Visitation is down -26% the week ending September 20 from 2019
- Nights spent in BC by Canadian travellers in August were more than 70% of nights spent in BC in August 2019
- Tourism regions vary in their dependency on international travellers
- Travelling Canadians are most interested in outdoor recreation and nature
- Americans are increasingly open to travel inspiration
- 66% of American travellers have postponed their planned 2020 trip to a later date
- Skift report shows positive signs of recovery in China, Europe and US
- “Flights to nowhere” sell out in 10 minutes, and other headlines
- Tourism and COVID-19 dashboard and reporting resources available

69% of BC residents feel somewhat safe travelling to nearby communities

- Destination Canada’s Resident Sentiment Wave 18 (September 15) report shows that 69% of BC residents feel at least somewhat safe to travel to nearby communities, with 56% feeling somewhat safe to travel to other communities in the province. Only 7% feel any degree of safety travelling to the United States or other international destinations.
- Destination Canada has transitioned the cadence of the Resident Sentiment research to bi-weekly from weekly.

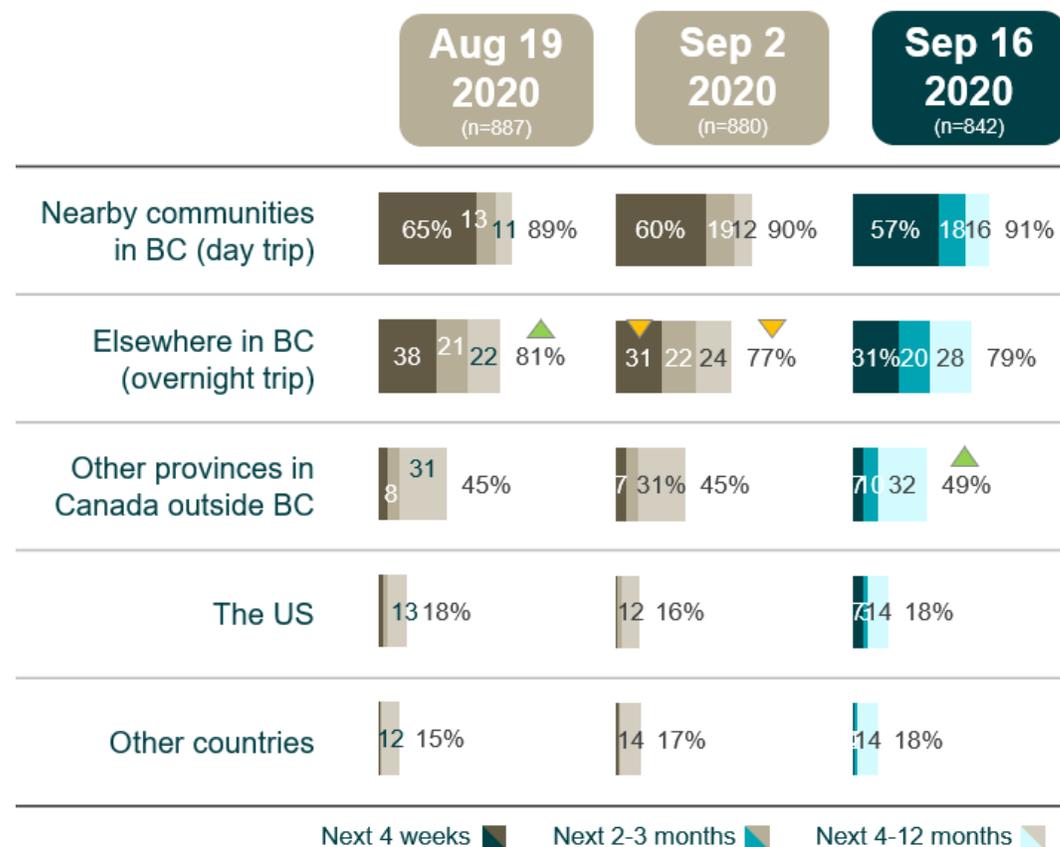
British Columbia / Colombie-Britannique

I feel safe to travel / Je me sens à l'aise de voyager



BC residents' intention to travel remain unchanged from previous wave

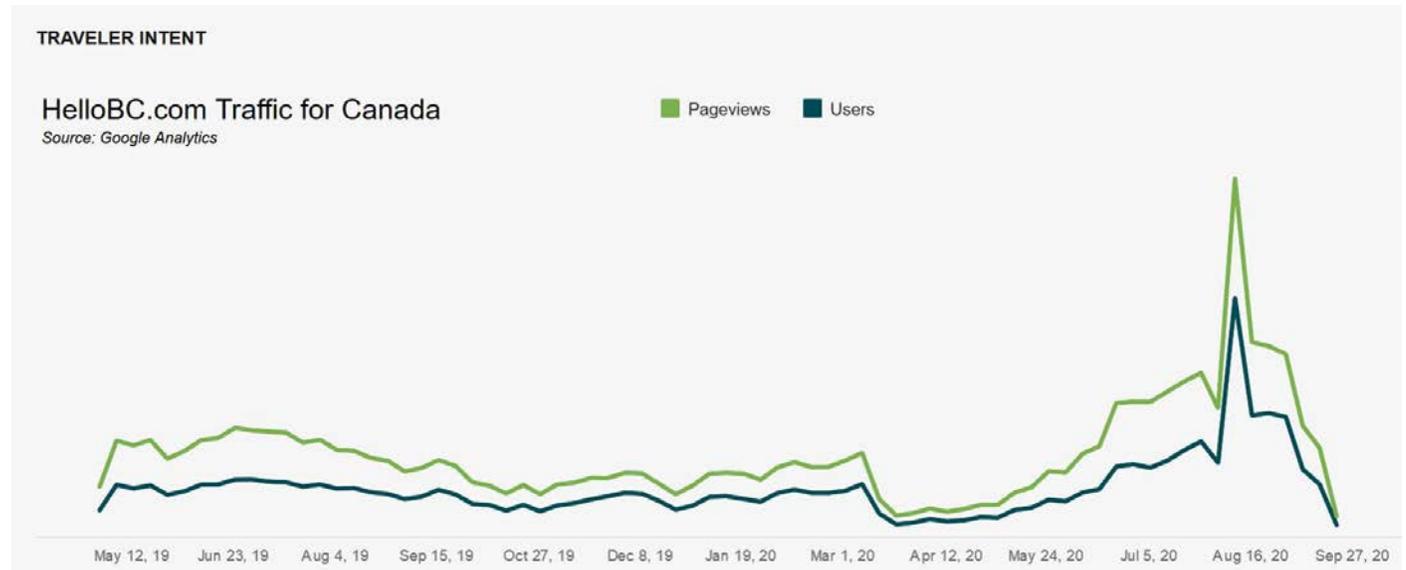
- Wave 10 (September 22) of our BC Residents' Public Perceptions: COVID-19 Travel and Tourism report shows BC residents' intentions to travel remain unchanged from the previous wave. 57% of BC residents have intentions to travel within their surrounding area for a day trip in the next 4 weeks (vs. 60% in Wave 9). Intentions to travel to other parts of the province overnight remain at 31%.
- Only 7% of BC residents intend to travel to other parts of Canada in the next 4 weeks, unchanged from the past few waves.
- There is still a very low likelihood of BC residents travelling to the US or internationally without a vaccine.



Source: [Destination BC's BC Residents Public Perceptions: COVID-19 Travel and Tourism Wave 10, Insights West, September 22, 2020](#)

September searches for travel in BC drop dramatically

- Travel-related Google searches dropped dramatically in September. Searches are down to April levels for the key terms “getting around in BC”, “places to visit: British Columbia” and “scenic drives/road trips”.
- These insights from Google 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.

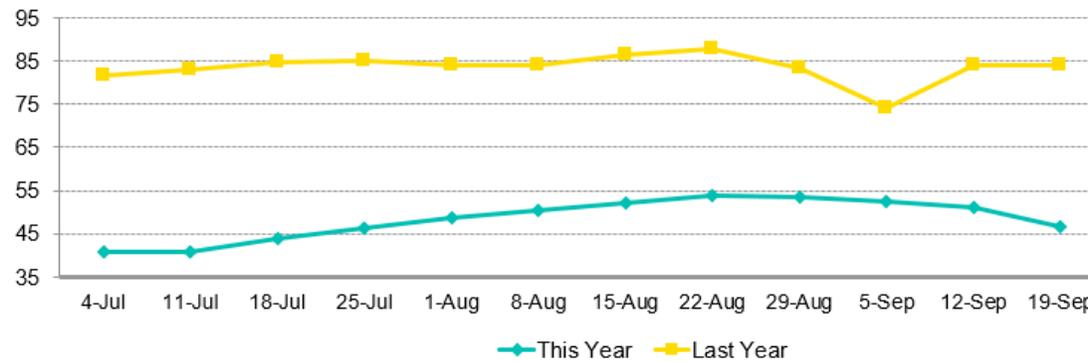


Source: [Signals & Sentiment Dashboard, Destination BC](#)

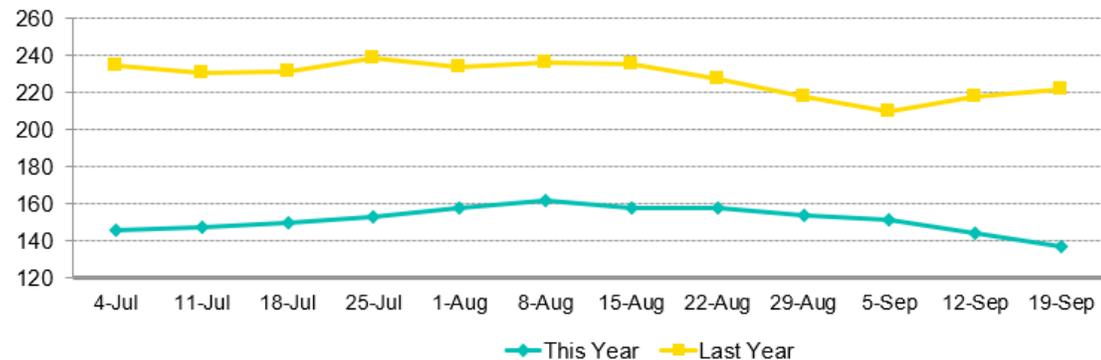
BC hotel ADR dropped 38% year-over-year for the week of Sept 13-19

- STR, an agency which captures BC hotel performance, shows the average weekly ADR for BC was \$136.86 for the week of September 13-19, which represents a -38.3% change year-over-year (September 15-21, 2019).
- Of the six cities tracked, the City of Vancouver saw the highest year-over-year rate of ADR percent change at -52.8%, followed by Richmond (-43.1%), Victoria (-24.6%), Whistler (-18.4%), Kamloops (-14.3%), and Kelowna (-10.7%).
- BC hotel occupancy was 46.6%. This represents a decrease of 4.3 points from the previous week and a decrease of -44.5 points compared to the previous year.

Weekly Occ (%) - Jul 04, 2020 to Sep 19, 2020



Weekly ADR - Jul 04, 2020 to Sep 19, 2020



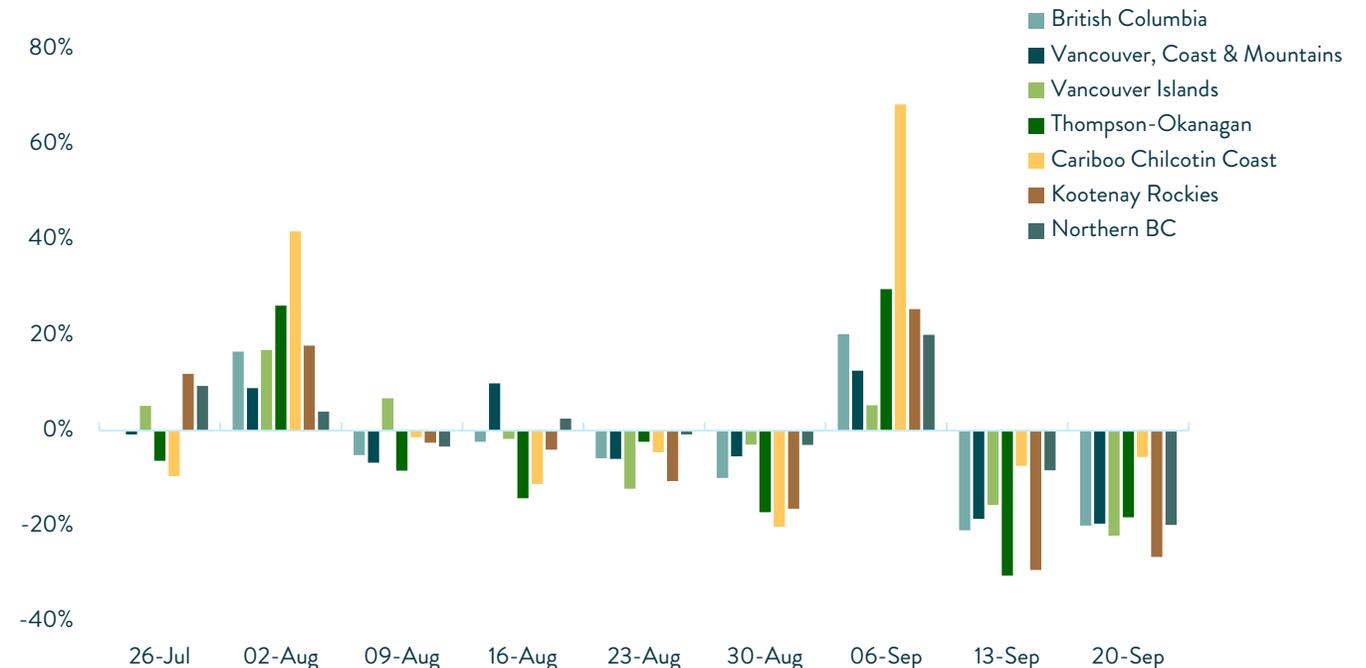
Source: [2020 STR, SIR Global Ltd](#)



Following Labour Day Weekend, visitation remains down for two consecutive weeks across BC

- According to Environics Analytics Weekly COVID Tracker Report, during the week ending September 20, BC experienced a week-over-week decrease in domestic overnight visitation (down -19.9%) from the previous week. A decrease is seen for the second consecutive week across BC, following the Labour Day weekend.
- All areas across the province saw week-over-week decreases in movement as well:
 - Kootenay Rockies (-26.5%)
 - Vancouver Island (-22.0%)
 - Northern BC (-19.8%)
 - Vancouver, Coast & Mountains (-19.5%)
 - Thompson Okanagan (-18.2%)
 - Cariboo Chilcotin Coast (-5.5%)

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

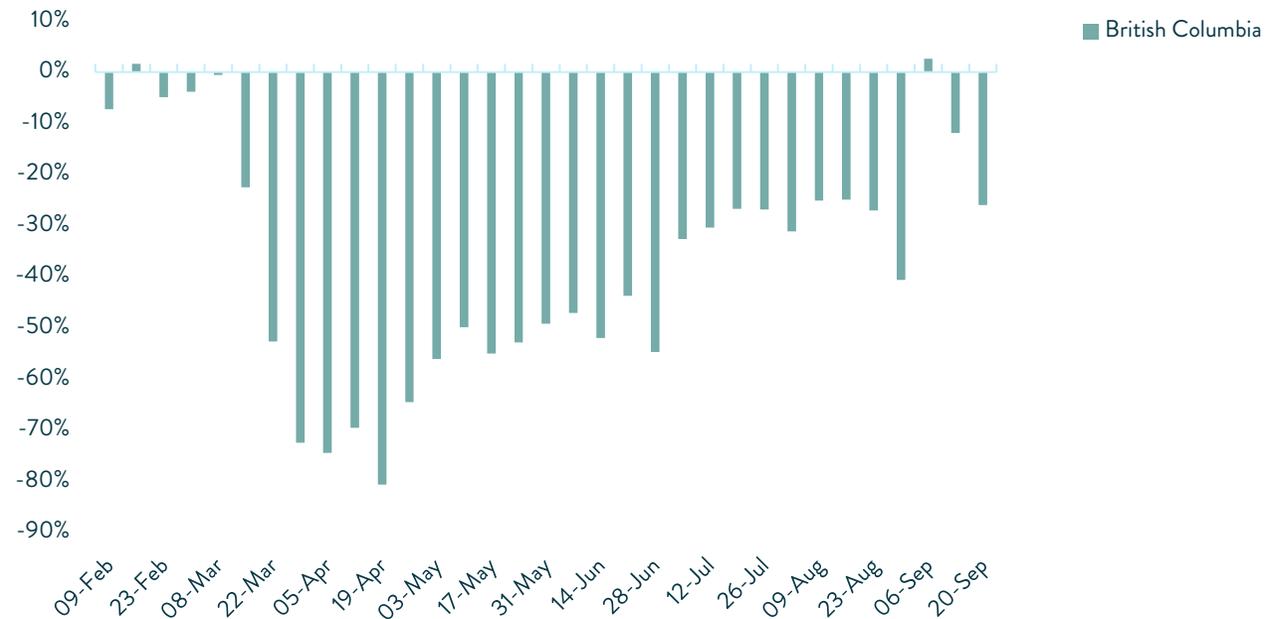


Source: [Environics Analytics Weekly COVID Tracker Report, September 20, 2020](#)

Visitation is down -26% the week ending September 20 from 2019

- Environics Analytics also reports year-over-year analysis in the Weekly COVID Tracker Report. Following the first year-over-year increase since mid-February during the week ending September 6, BC resumed the year-over-year decrease in visitation trend for the second consecutive week. For the week ending September 20, overnight domestic visitation was down -26.0%, compared to the same week in 2019.
- While year-over-year increases in visitation were not seen in the majority of tourism regions across BC, such as Vancouver, Coast and Mountains (-38.6%), Kootenay Rockies (-29.0%), Vancouver Island (-28.6%), Thompson Okanagan (-17.4%), and Northern BC (-0.4%), increases in visitation were seen in the Cariboo Chilcotin Coast (+25.5%).

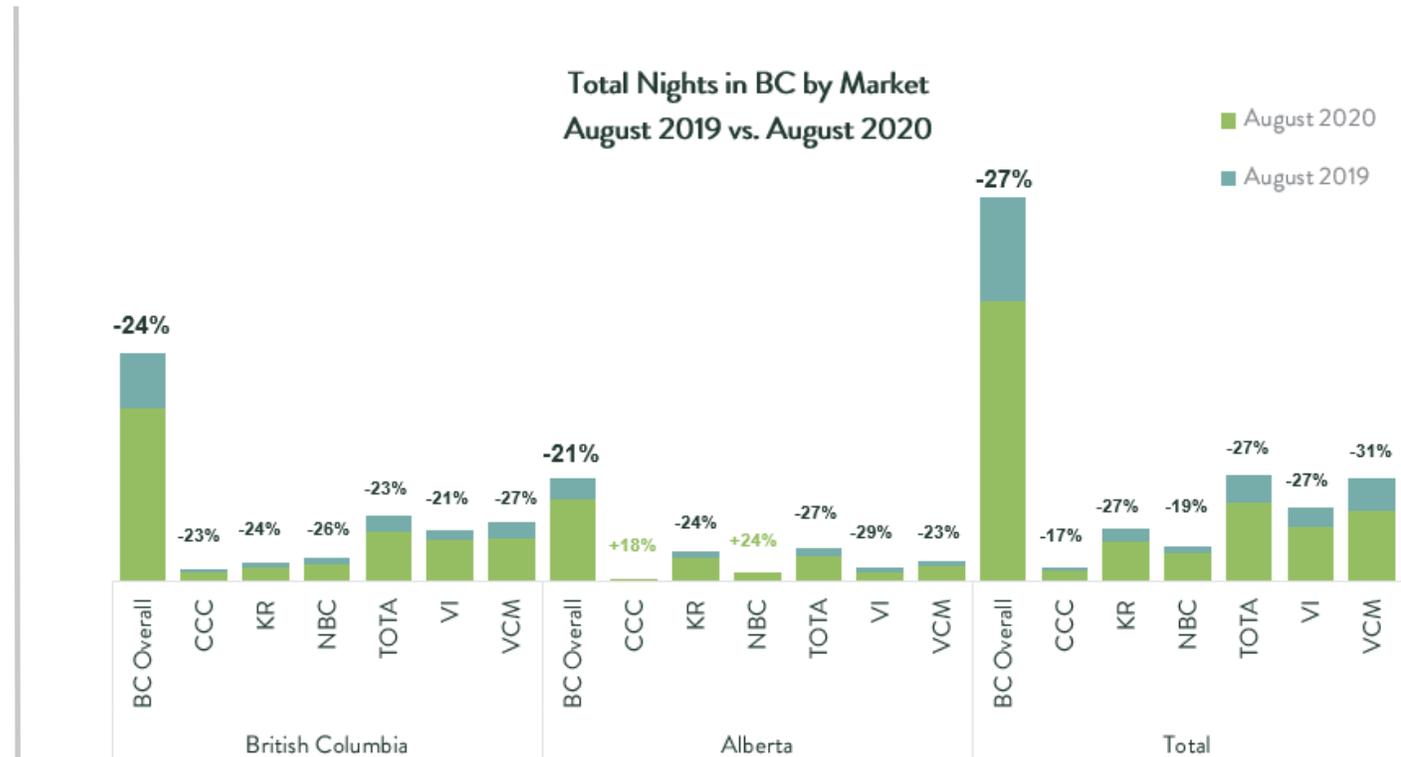
BC's Domestic Overnight Visitation
Year-over-Year Percent Change



Source: [Environics Analytics Weekly COVID Tracker Report, September 20, 2020](#)

Nights spent in BC by Canadian travellers in August were more than 70% of nights spent in BC in August 2019

- While total trips for the month of August remained below August 2019 levels (-33%), visitors are spending more nights while on their trips in BC compared to August 2019.
- Total nights spent in BC during August 2020 is down -27% from the total nights spent in August 2019.
- Based on Environics Analytics mobility data, British Columbia has managed to achieve the “best case” scenario for travel by British Columbians in July, reaching nearly 90% of nights spent around the province by BC residents, however, for August, this has decreased to 75%.
- For August 2020, a decrease of -21% in total nights spent by the Alberta market is seen and a decrease of -59% is seen by the Ontario market.

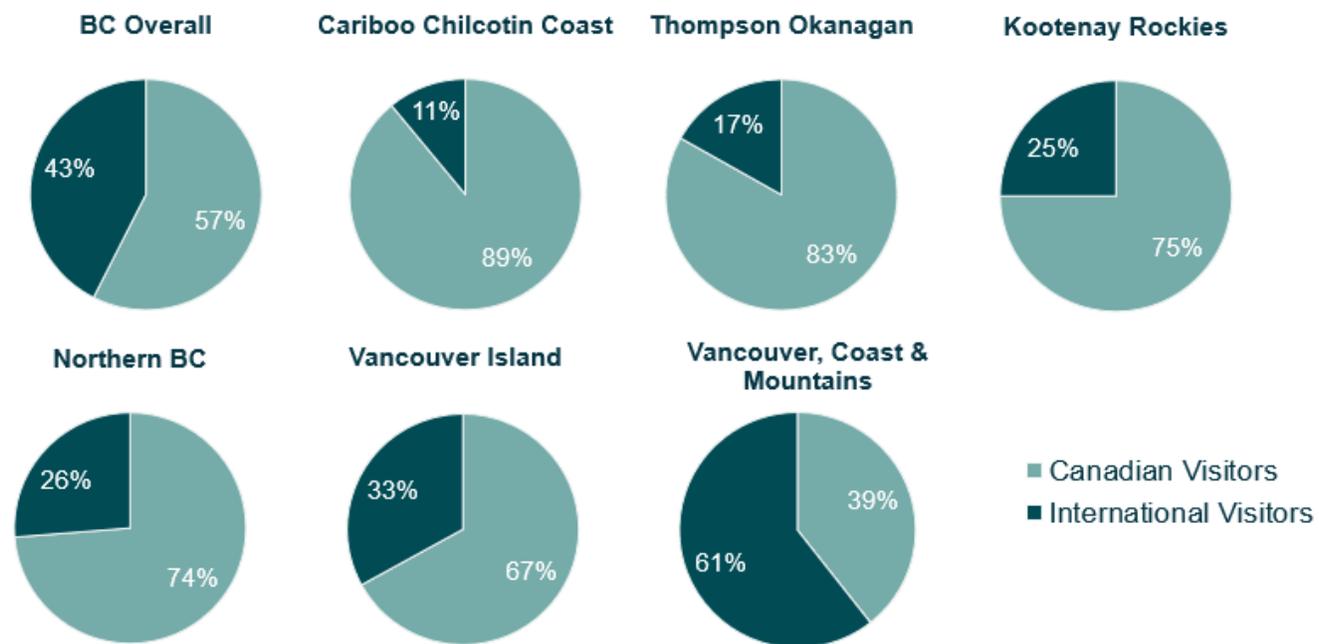


Source: Environics Analytics VisitorView Domestic

Tourism regions vary in their dependency on international travellers

- Even with BC travel at 70% of last year, tourism regions that are more dependent on international visitors continue to suffer disproportionately.
- For example, British Columbians and Canadians in general, have not made a significant shift away from Vancouver, Coast and Mountains (VCM) and other tourism regions compared to the past, however, since VCM normally welcomes many international visitors, it has been disproportionately affected by border closures.

Canadian vs. International Nights Spent in BC

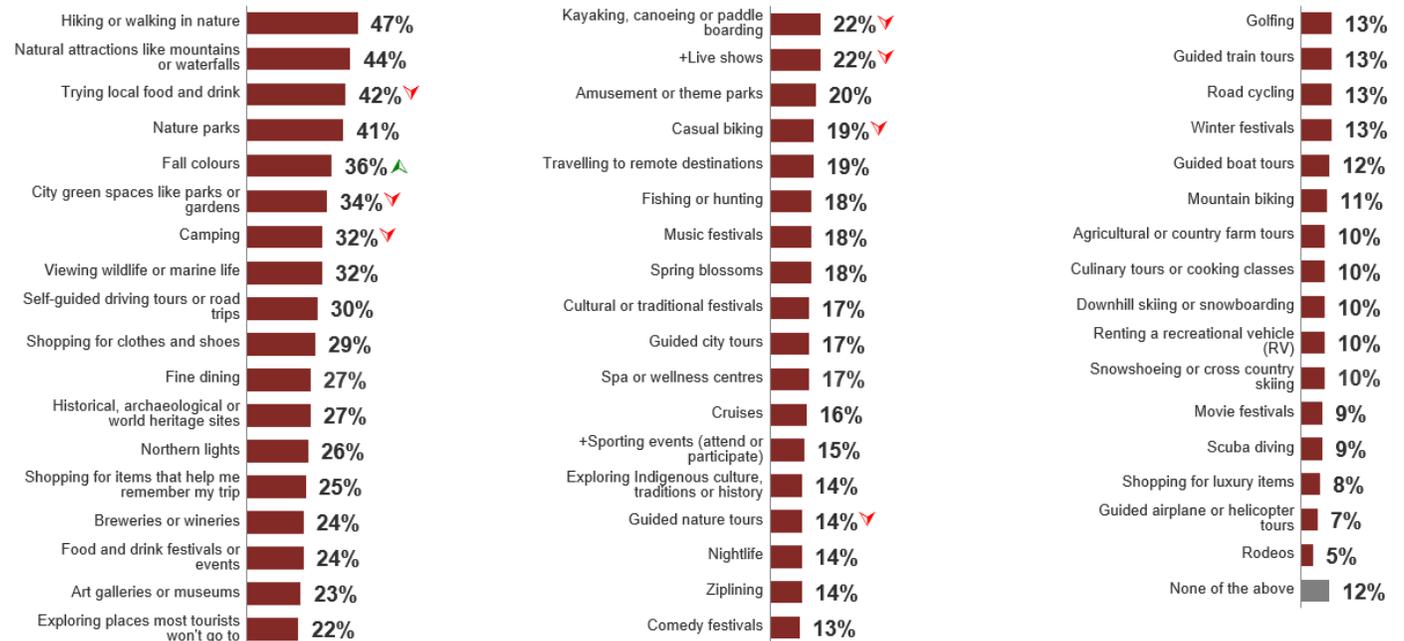


Source: Destination BC's Estimates based on Statistics Canada National and International Travel Surveys

Travelling Canadians are most interested in outdoor recreation and nature

- According to Destination Canada's Global Tourism Watch COVID Special Survey Wave 3 – (September), Canadians are most interested in outdoor recreation and nature-based activities during COVID-19. One exception is trying local food and drink, with 42% of people interested.
- The full report, covering Canadian travel intentions, domestic resident characteristics and COVID-related topics, can be found on [Destination BC's Research & Insights COVID-19](#) webpage, including Wave 1 and 2 reports.

General Activities Interested In



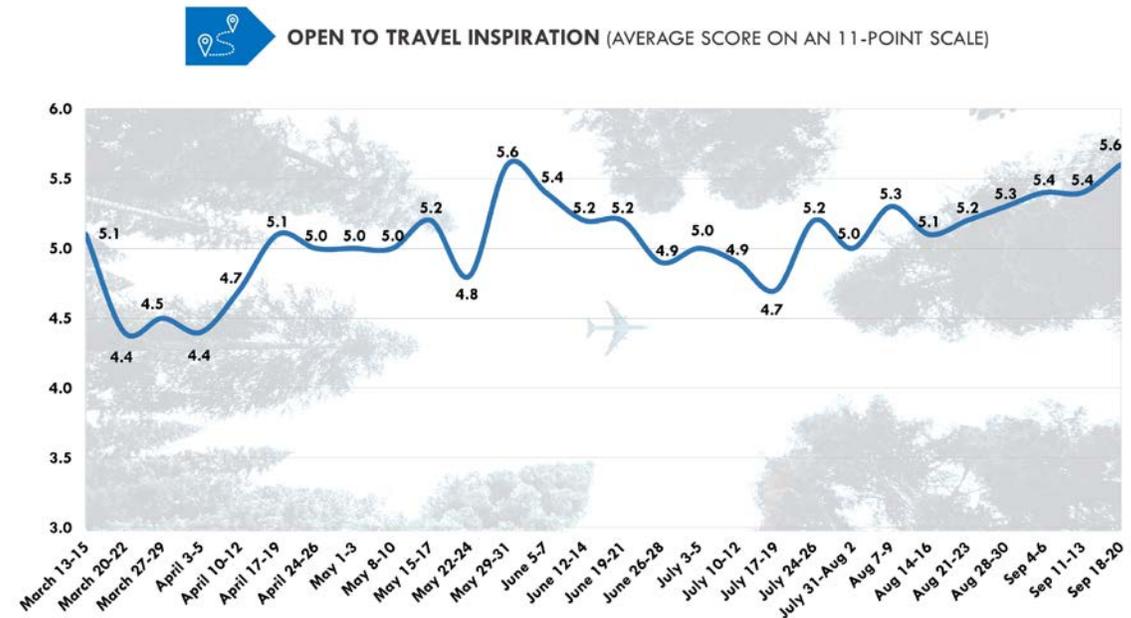
Source: [Global Tourism Watch COVID Special Survey Wave 3, Destination Canada, August, 2020](#)

Americans are increasingly open to travel inspiration

- According to Destination Analysts, Americans are increasingly open to travel inspiration. This is a continuing trend over the past five weeks. Excitement for learning about new travel experiences or destinations is at the highest it's been since the beginning of the pandemic.
- Less than 50% of American travellers consider the following to be unsafe: staying in a hotel, Airbnb or home rental; dining in a restaurant; visiting an amusement park or other outdoor attraction; recreating outdoors; and shopping.
- Only 37% of Americans say they need a vaccine to travel, down from 45% at the beginning of August.

OPENNESS TO TRAVEL INSPIRATION

MARCH – SEPTEMBER



QUESTION: AT THIS MOMENT, HOW INTERESTED ARE YOU IN LEARNING ABOUT NEW, EXCITING TRAVEL EXPERIENCES OR DESTINATIONS TO VISIT?

(Base: Waves 1-28. All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214, 1,214, 1,205, 1,231, 1,365, 1,213, 1,200, 1,206, 1,224, 1,201, 1,202, 1,207, 1,250, 1,225, 1,205 and 1,200 completed surveys.)

Destination Analysts
DO YOUR RESEARCH

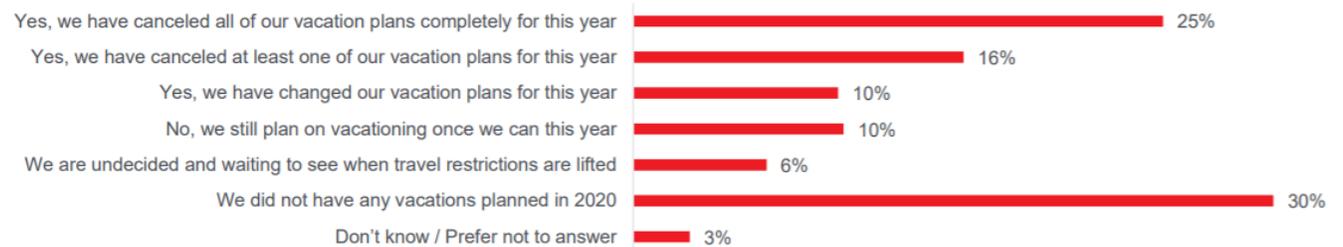
Source: [Destination Analysts, September 21, 2020](#)



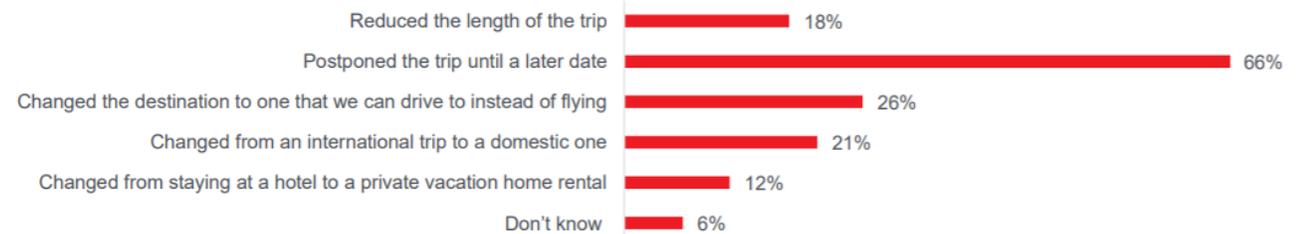
66% of American travellers have postponed their planned 2020 trip

- According to a Leger survey on tourism in the US, travel is shifting towards local. 41% of American travellers have canceled some or all of their 2020 vacation plans, though a small proportion of travellers modified their plans. 66% of these postponed their trip to a later date; 26% changed their destination to one that they can drive to instead of flying; and 21% changed from an international trip to a domestic vacation.
- 51% of Americans plan to spend more time travelling within their state over the next year, while 52% plan to take more staycations.
- 65% of Americans are looking forward to being able to travel again, and 65% of Americans are willing to wait until it is safe to travel again.

Q. Have you changed travel plans in 2020 due to the COVID-19 pandemic? (Base n=1001)



Q. How have your travel plans changed? (only asked if respondents noted they have changed their travel plans on previous slide; Base n=97)



Source: [Tourism in the United States: Assessing the Impact on COVID-19 on Current and Future Travel, Leger, September 15, 2020](#)



Skift report shows positive signs of recovery in China, Europe and US

- A new Skift Research report shows positive signs. China is seeing domestic recovery for leisure and business travel, Europe and especially Germany are showing travel demand recovery, and the United States is seeing a “considerable amount of searches and advance bookings”.
- The report also shows how travellers want to travel but have an inability to “do anything meaningful” once they arrive due to necessary public health measures and safety precautions. Many business travellers are also eager to travel, but may be limited by their company’s policies and obligations.
- COVID-19 may be the turning point for vacation rentals to become “mainstream” as working from home means the lines between leisure and business travel are blurred.
- Before the industry can use price to increase demand, they must restore consumer confidence.

Chinese hotel indicators continue to narrow the gap, supported by leisure demand in summer and recovery of domestic business travel.



Source: [The Travel Industry Turned Upside Down, Skift Research, September 2020](#)

“Flights to nowhere” sell out in 10 minutes, and other headlines

The airline industry is in major flux. Here are some headlines from recent weeks:

- Airlines have taken to selling “flights to nowhere” that depart and arrive from the same airport. Many are selling out, with Qantas’s first offering selling out in 10 minutes. [Source](#)
- Ethiopian Airlines debuts the first contactless bio-safety terminal in the world. [Source](#)
- A new relief bill in the US could prevent up to 100,000 airline layoffs. [Source](#)
- International airline levels were 92% below 2019 levels in July, with little improvement in August. [Source](#)
- After recent efforts to “overhaul the male-dominated airline sector”, many of the pilots slated for layoffs under “last in, first out” policies are female. [Source](#)
- Many US airlines are shifting from focus on business travellers to leisure flyers in an effort to regain revenue. [Source](#)
- Lufthansa forecasts shift from 50% of capacity to 20-30% of last year’s levels by Q4. [Source](#)
- Estimated timeline of airlines “returning to reality” have expanded to 2024. [Source](#)



Tourism and COVID-19 dashboard and reporting resources

- Destination BC developed a [Signals & Sentiment dashboard](#) to follow core markets and inform their approach through COVID-19. We also conduct and commission general [research and insights](#) related to travel and tourism in British Columbia, as well as [COVID-19 Research and Insights](#).
- 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 industry.
- 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](#).
- 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 Research & Insights COVID-19](#) webpage

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