



# COVID-19 Research Roundup

November 9, 2020



## *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 October 19, 2020, Canadian and US officials agreed to extend the closure of the border between the two countries to non-essential travel until at least November 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:

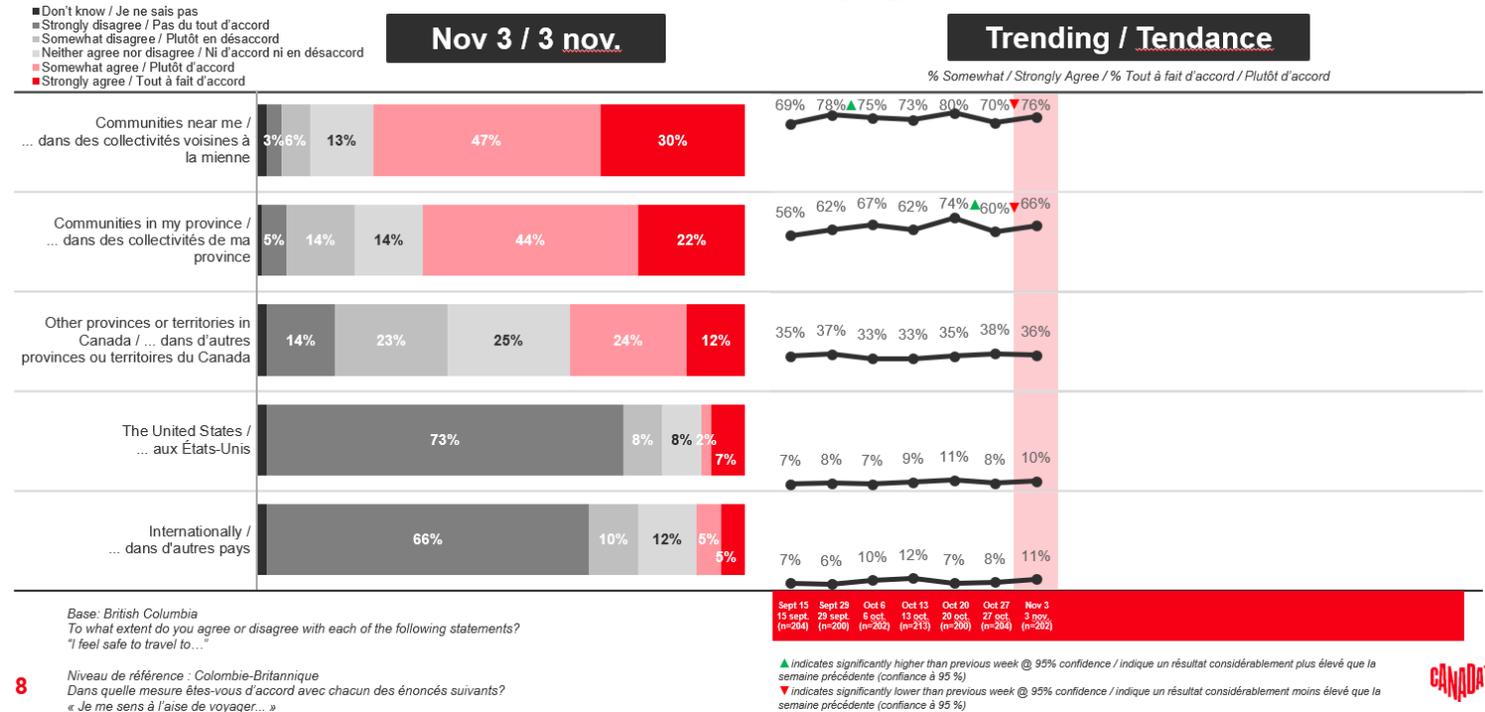
- BC residents' feelings of safe travel within BC increase again
- 43% of BC residents intend to travel within the next four weeks
- BC's weekly visitation is down -8.5% compared to previous week
- BC's weekly movement decreases -21.6% compared to same weekly period in 2019
- BC hotel occupancy and ADR continue to decline
- Domestic airline bookings to BC dip slightly
- Research shows airline flights to be safer than grocery shopping with layered approach
- Over a third of American travellers plan to travel more domestically
- Mobile optimization, multi-channel campaigns are the new normal
- Canada has third strongest Nation Brand in the world
- Tourism and COVID-19 dashboard and reporting resources available



# BC residents' feelings of safe travel within BC increase again

- In Destination Canada's Wave 23 (November 3) report, feelings of safety towards travel have increased both to nearby communities and the rest of BC for BC residents after a significant decrease in the previous wave.
- Compared to their fellow Canadian counterparts, BC residents' feelings are similar to Ontario residents in terms of feeling safe to travel within their own province (76% for BC and 72% for ON).
- 36% of BC residents feel safe to travel out of province to other areas of Canada, whereas a greater proportion of Alberta residents (49%) feel it is safe to travel outside of Alberta, within Canada.

## British Columbia / Colombie-Britannique I feel safe to travel / Je me sens à l'aise de voyager

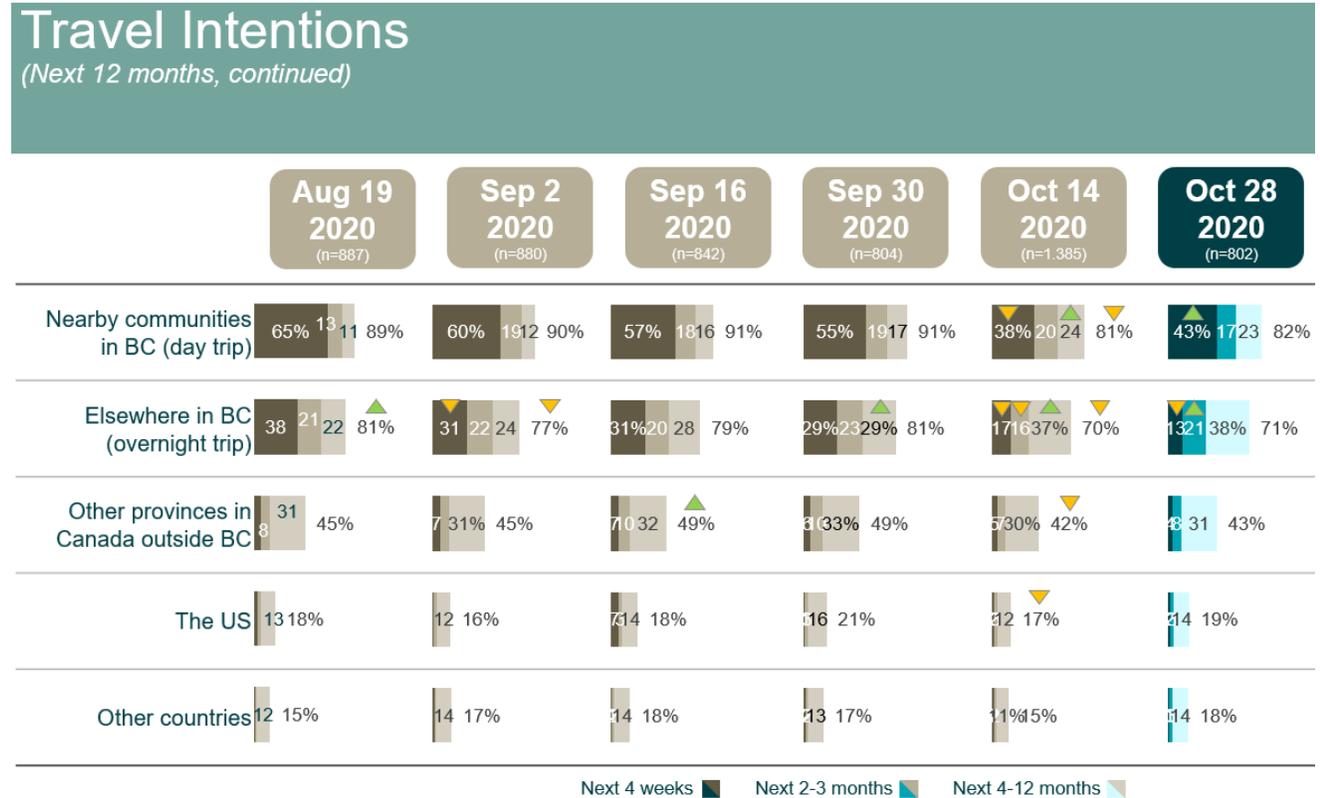


Source: [Destination Canada's Weekly Resident Sentiment, Wave 23, Leger, November 3, 2020](#)



# 43% of BC residents intend to travel within the next four weeks

- Wave 13 (October 28) of Destination BC's BC Residents' Public Perceptions survey shows that 43% of BC residents intend travel within the next four weeks, a +5 point increase from the previous wave.
- 82% of BC residents intend to travel to nearby communities in BC within the next 12 months.
- 10% of BC residents will only take overnight trips in BC after there is a vaccine.
- 47% of BC residents are at least somewhat concerned to welcome visitors from nearby communities, while 61% are for those from elsewhere in BC.

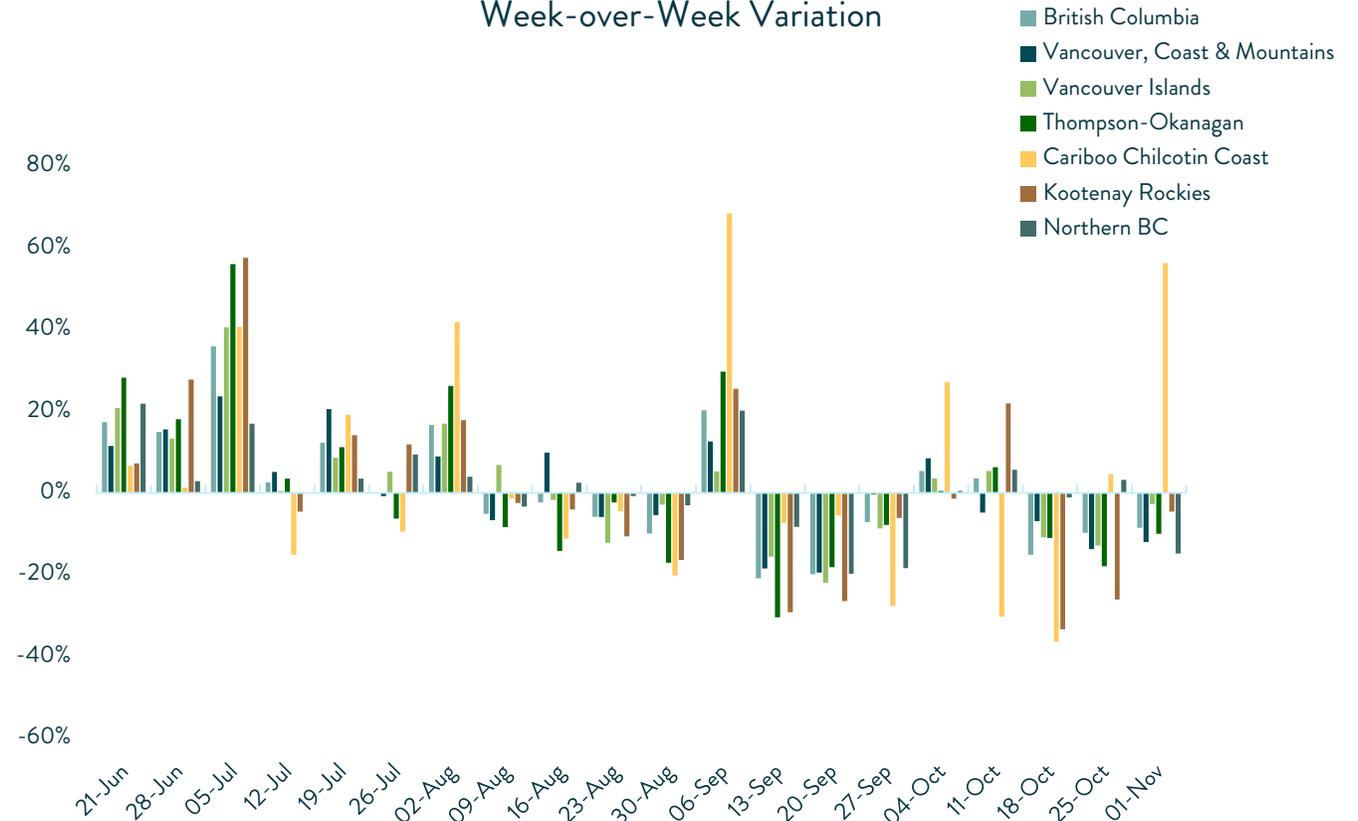


Source: [Destination BC's BC Residents' Public Perceptions: COVID-19 Travel and Tourism Wave 13, Insights West, October 28, 2020](#)

# BC's weekly visitation is down -8.5% compared to previous week

- According to Environics Analytics Weekly COVID Tracker Report, during the week ending November 1, BC experienced a week-over-week decrease in domestic overnight visitation (-8.5%) from the previous week.
- Nearly all regions across the province saw week-over-week decreases in movement compared to the previous week:
  - Northern BC (-14.8%)
  - Vancouver, Coast & Mountains (-12.0%)
  - Thompson Okanagan (-10.0%)
  - Kootenay Rockies (-4.6%)
  - Vancouver Island (-2.7%)
- The Cariboo Chilcotin Coast (+56.2%) saw a week-over-week increase in movement compared to the previous week.

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



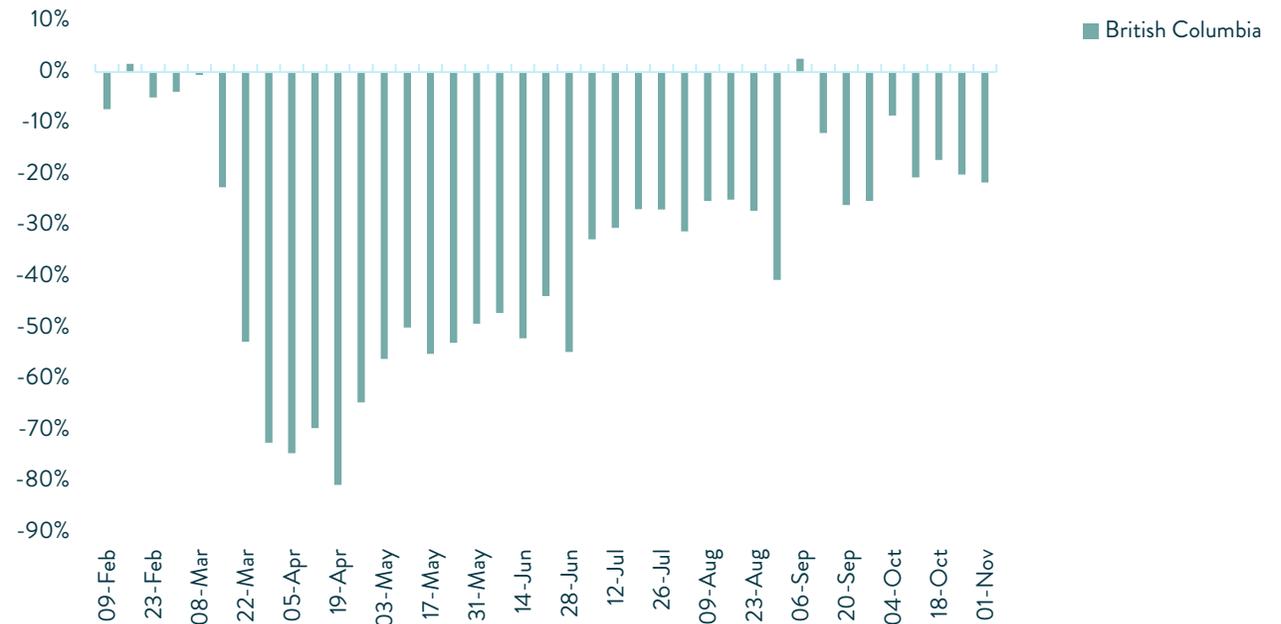
Source: [Environics Analytics Weekly COVID Tracker Report, November 1, 2020](#)



# BC's weekly movement decreases -21.6% compared to same weekly period in 2019

- Environics Analytics also reports year-over-year analysis in the Weekly COVID Tracker Report.
- For the eight consecutive week, BC's overnight domestic visitation was down (-21.6%) for the week ending November 1 compared to the same week in 2019.
- A year-over-year decrease in visitation was seen across nearly all tourism regions:
  - Vancouver, Coast and Mountains (-37.2%)
  - Vancouver Island (-27.0%)
  - Thompson Okanagan (-11.3%)
  - Northern BC (-8.2%)
- The Cariboo Chilcotin Coast (+29%) saw a week-over-week increase in movement compared to the previous week and no change was seen in the Kootenay Rockies (0%).

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

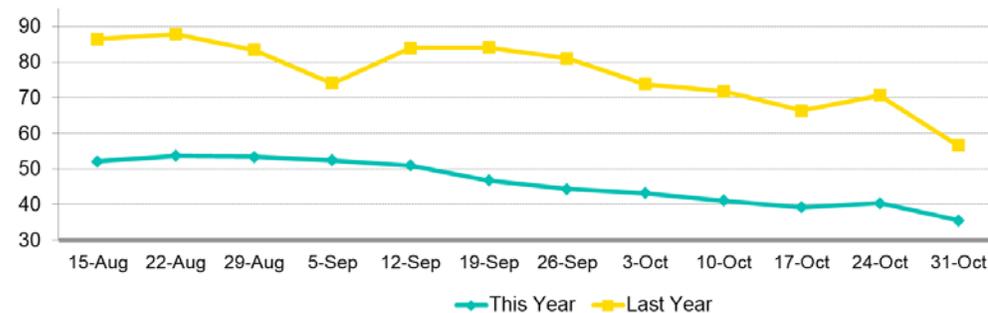


Source: [Environics Analytics Weekly COVID Tracker Report, November 1, 2020](#)

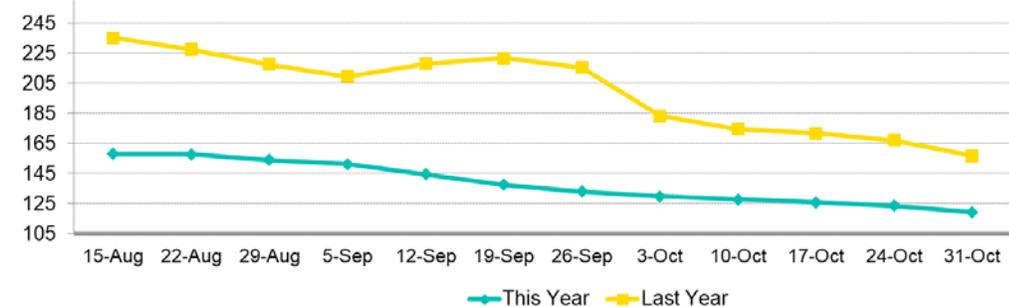
## BC's hotel performance continues to decline

- STR, an agency which captures BC hotel performance, shows the average weekly occupancy for BC was 35.6% for the week of October 25-31, 2020. This represents a decrease of -4.6 points from the previous week and a decrease of -21.0 points compared to the previous year.
- BC's average daily rate (ADR) was \$119.24 for the week of October 25-31, 2020. This represents a -3.3% decrease from the previous week, and a -23.9% decrease compared to a similar period in 2019.

Weekly Occ (%) - Aug 15, 2020 to Oct 31, 2020



Weekly ADR - Aug 15, 2020 to Oct 31, 2020



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

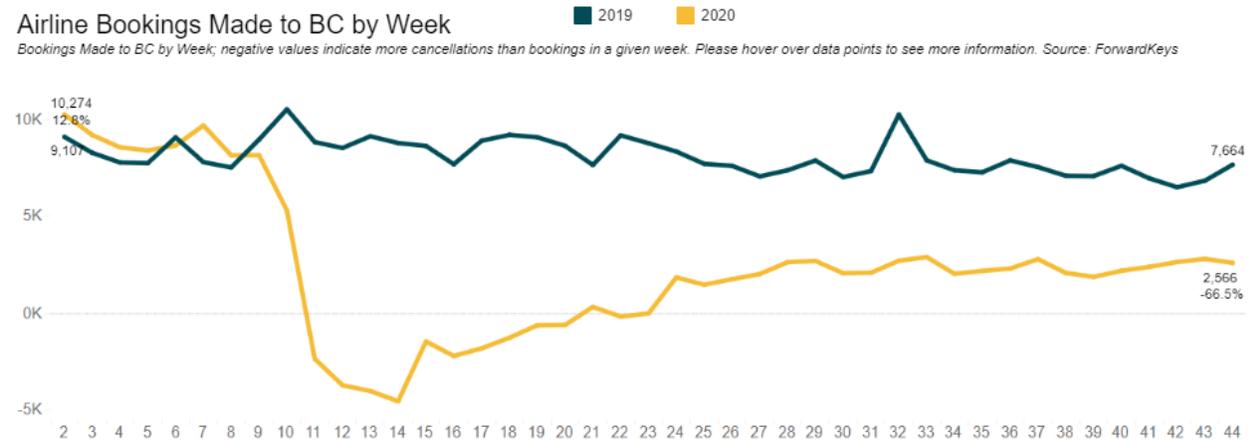


# Domestic airline bookings to BC dip slightly

- ForwardKeys, a flight analysis company, has shown that during the week of October 21, 2020, there were 2,566 airline bookings made to BC from Canada. This is a decrease of -66.5% from the same time period last year.
- Domestic arrivals to BC for the month of October have seen a year-over-year decrease of -70% based on bookings.
- These insights from ForwardKeys and more can be found in the Signals & Sentiment dashboard located on the Destination BC COVID-19 Hub, under the [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 and Sentiments Dashboard, Destination BC](#)



# Research shows airline flights safer than grocery shopping with layered approach

- Researchers with the Aviation Public Health Initiative (APHI), a project of the Harvard T.H. Chan School of Public Health released a report stating that transmission risks of COVID-19 during airline flights are very low.
- According to their research, when layered approach measures including mandated masks, boosted cleaning procedures, and revised boarding procedures are taken, flights are safer than grocery shopping or going out to dinner, saying, “with millions of passenger hours flown, there has been little evidence to date of onboard disease transmission.”



Source: [Aviation Public Health Initiative Phase 1 Report, Harvard T.H. Chan School of Public Health](#)

Source: [Reuters, October 27, 2020](#)

# Over a third of American travellers plan to travel more domestically

- Destination Analysts, an American tourism research firm, found that over a third of American travellers plan to travel more domestically in the next two years.
- Over a quarter said they want to visit more national parks and public lands, and nearly a quarter of American travellers indicated that they want to visit more bucket-list destinations and are open to new travel ideas.
- Over 40% of American travellers feel or would feel guilty travelling. Half say travel feels irresponsible.

## FUTURE TRAVEL PRIORITIES (NEXT 2 YEARS) AS OF NOVEMBER 1<sup>ST</sup>



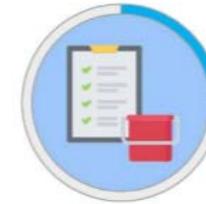
**TRAVELING MORE DOMESTICALLY**  
(33.4%)



**TRAVELING MORE WITH MY FAMILY**  
(31.2%)



**VISITING MORE NATIONAL PARKS AND PUBLIC LANDS**  
(26.4%)



**VISITING MORE DESTINATIONS ON MY BUCKET LIST**  
(23.9%)



**BEING MORE OPEN TO NEW TRAVEL IDEAS**  
(23.6%)



**TRAVELING MORE INTERNATIONALLY**  
(19.5%)



**TRAVELING MORE WITH FRIENDS**  
(19.2%)



**VISITING ICONIC AMERICAN CITIES**  
(16.7%)



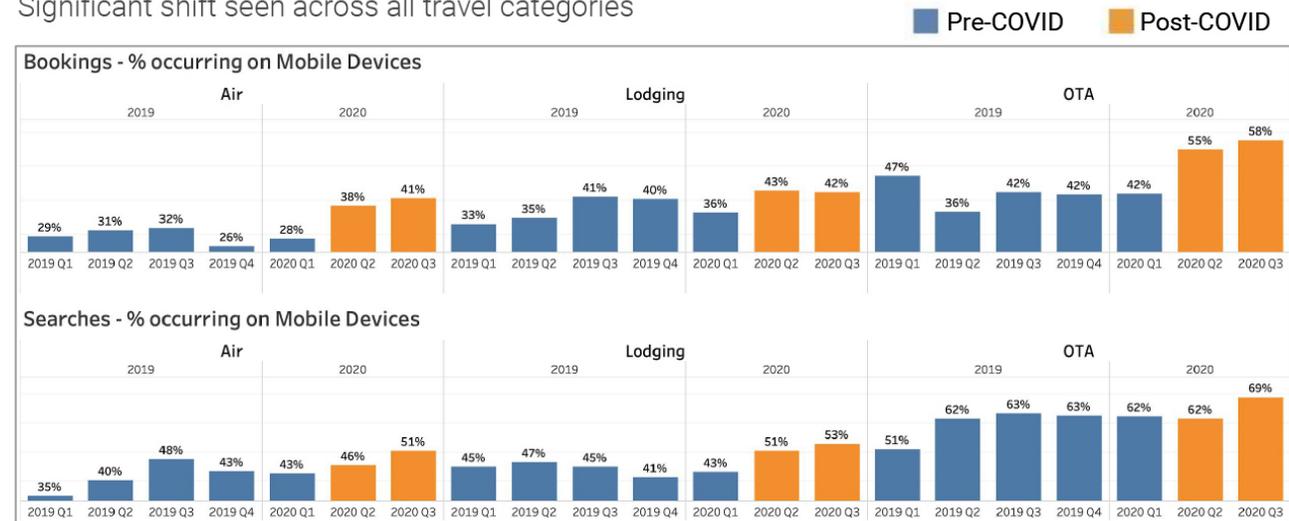
Source: [COVID-19's Impact on American Travel, Destination Analysts, November 3, 2020](#)

# Mobile optimization, multi-channel campaigns are the new normal

- Sojern reports that COVID-19 has driven digital adoption rates at an accelerated pace, including a +40% increase in consumers using social media.
- Travel bookings are accelerating on mobile channels across all travel categories, a trend that has increased with the pandemic.
- Consumers are using multiple channels to “dream, plan, and book” travel. Sojern found that their customers who advertised on three channels (Facebook, SEM, and display) saw double the conversion.

## Travel Bookings Accelerating on Mobile Channels

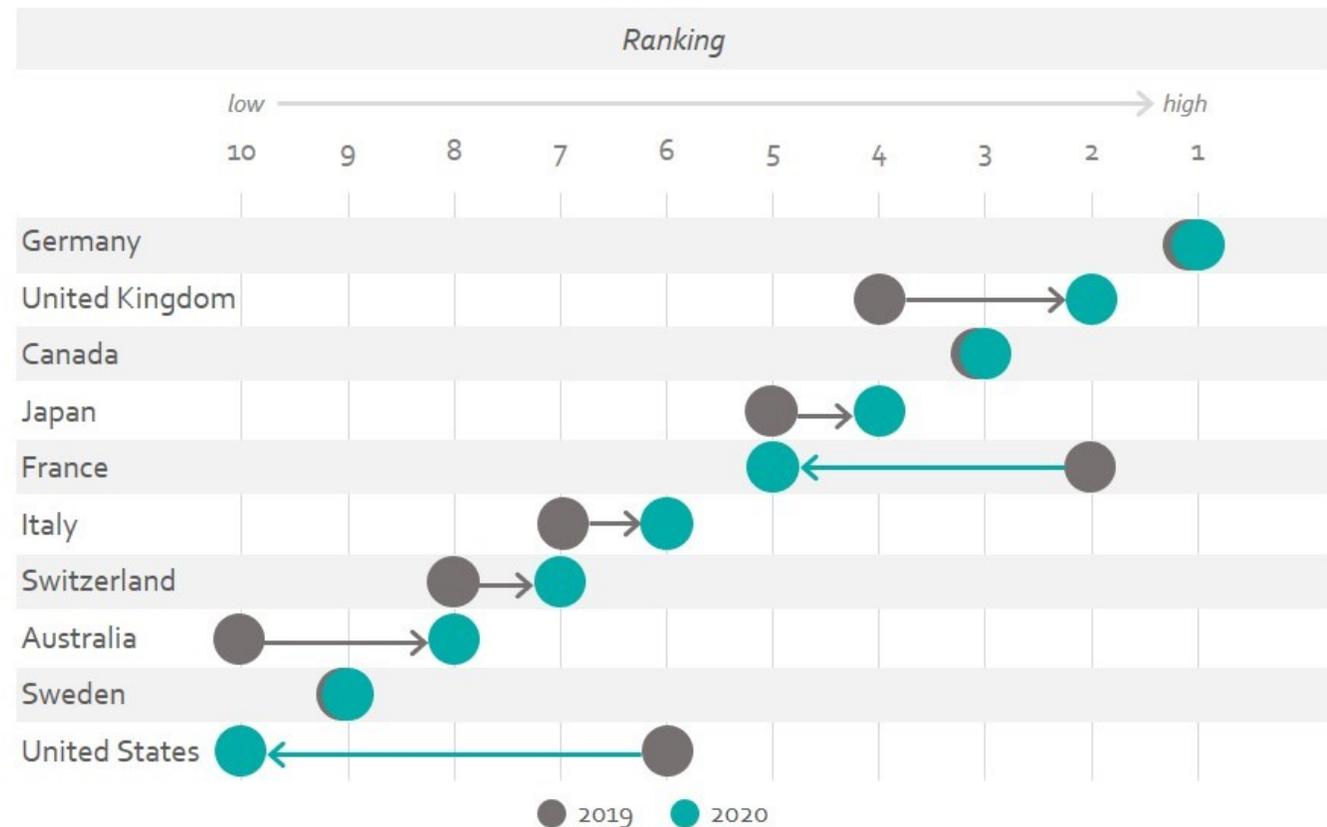
Significant shift seen across all travel categories



Source: [Sojern, November 2, 2020](#)

# Canada has third strongest Nation Brand in the world

- Ipsos has announced that Canada has the third strongest Nation Brand in the world, after Germany and the United Kingdom. This marks the second year of Canada in third place.
- Ipsos shares that Canada’s reputational strengths “are on the People and Governance categories – driven by positive opinion about the welcoming nature of Canada’s people and the competence and honesty of its government.”
- Canada’s brand weaknesses are on the Exports and Tourism categories, especially on the “perception of contribution to science and technology and its historic buildings.”



Source: [Ipsos, October 27, 2020](#)

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

- Destination BC's [Signals & Sentiment dashboard](#) follow core markets and informs 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 a [tourism recovery tracker](#), the most comprehensive tourism dashboard to date.
- 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 compiles meetings and events information as well as links to several other resources helpful to the Business Events segment in our industry.
- PhocusWire has a live roundup of [coronavirus-related tourism news](#).
- Skift has 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.





DESTINATION  
BRITISH COLUMBIA®

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

Research & Analytics  
[TourismResearch@DestinationBC.ca](mailto:TourismResearch@DestinationBC.ca)