



DESTINATION
BRITISH COLUMBIA

COVID-19 Research Roundup

March 22, 2021



New Denver, Kootenay Rockies

BC's Restart Plan

The phased approach to [BC's Restart Plan](#) is on pause for the duration of province-wide restrictions, as noted below.

Province-wide restrictions

To get COVID-19 transmission under control, the Province is urging all British Columbians to press pause on all non-essential travel and stay in their local community. Some insights noted in this Research Roundup were gathered prior to this announcement by BC's Provincial Health Officer, Dr Bonnie Henry, originally given on November 19 and reinforced on December 7, 2020, January 7, 2021, and February 5.

On March 19, 2021, Canadian and US officials agreed to extend the closure of the border between the two countries to non-essential travel until at least April 21, 2021.

Information provided in this Research Roundup Report highlights not only local insights, but global insights which may be applicable to BC now.





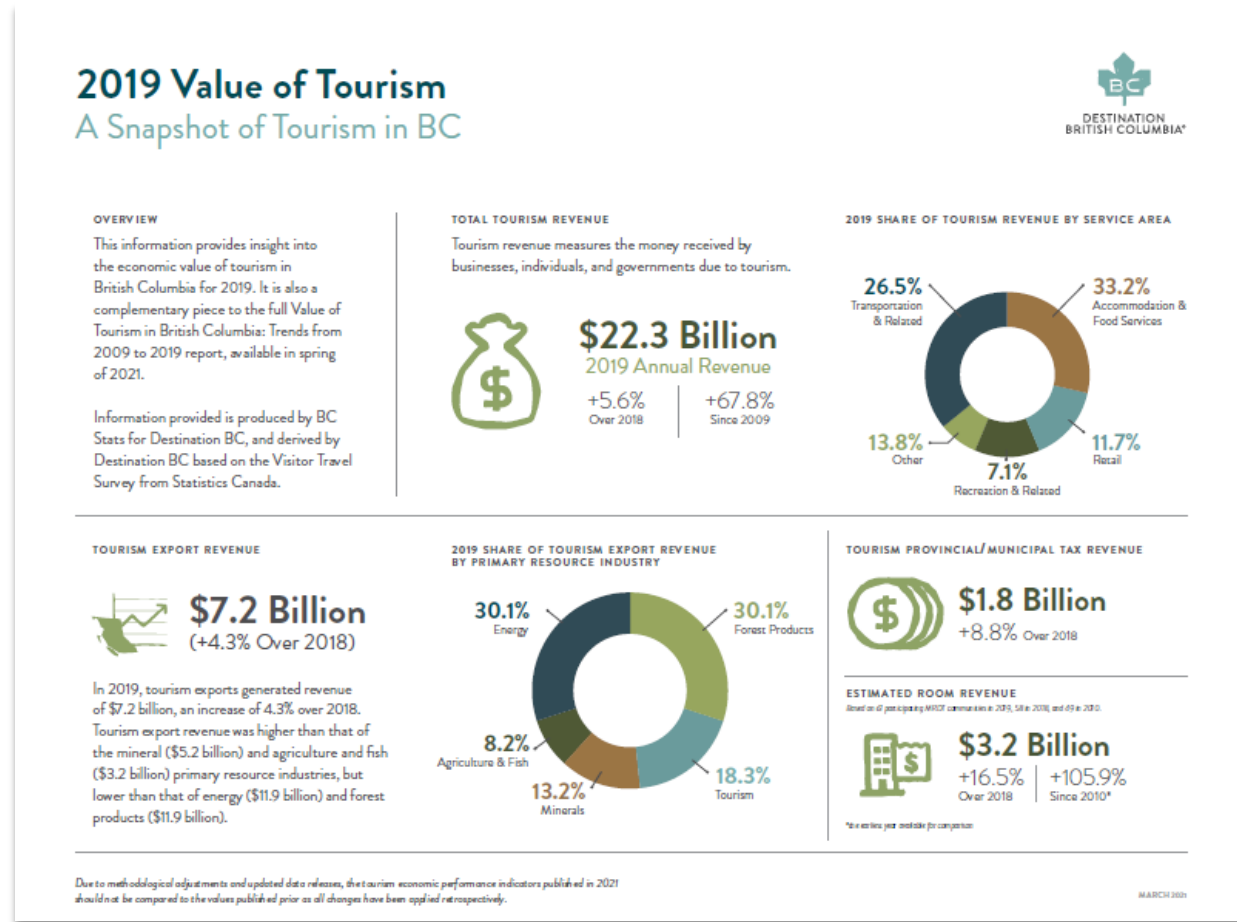
Destination BC is rounding up relevant research and articles each week related to the travel and tourism industry and COVID-19.

Last week in brief:

- Destination BC releases BC's 2019 Value of Tourism Snapshot
- 53% of Alberta residents feel safe to travel to other provinces or territories in Canada (+23 net score)
- 50% of BC residents are concerned to welcome visitors from nearby communities
- 89% of BC residents will be comfortable welcoming visitors when their community is fully vaccinated
- 74% of Owner Direct vacation rental customers plan to visit nearby communities within the next 12 months
- BC sees an increase of +3.3% in weekly domestic overnight visitation compared to previous week
- BC sees a decrease of -37.5% in weekly domestic overnight visitation compared to same period last year
- BC's occupancy rate (38.3%) up +2.1 points from the previous week
- BC's average daily rate (\$133.42) up +0.1% from the previous week
- BC's revenue per available room (RevPAR) (\$51.13) up +6.0% from the previous week
- BC tourism employment in February 2021 was down -15% year-over-year
- Destination Canada reports Canada's 2020 tourism losses are the greatest on record
- Leger reports 51% of Canadians intend to get vaccinated with the first vaccine offered
- Skift commented on the disparate effects of the shutdown on Indigenous tourism in Canada
- Destination Analysts reports 41.5% of American Travellers feel they can travel safely
- Phocuswright shares that the US travel market is forecasted at \$289 billion USD in 2022
- Travel Agent Central reports 32% of US agency client travellers have booked their next trip
- Tourism and COVID-19 dashboard and reporting resources

Destination BC releases BC's 2019 Value of Tourism Snapshot

- Destination BC has released its annual Value of Tourism Snapshot publication.
- The Snapshot summarizes the economic contribution of tourism in BC for 2019. This publication includes indicators, such as total tourism revenue, export revenue, GDP, employment, businesses, and more.
- A time-lag for tourism economic indicators is seen each year (e.g. 2019 estimates are available early 2021) as a result of availability of complete annual business data, as well as processing and review time.
- This information and more can be found on the [Destination BC Research & Insights portal](#).



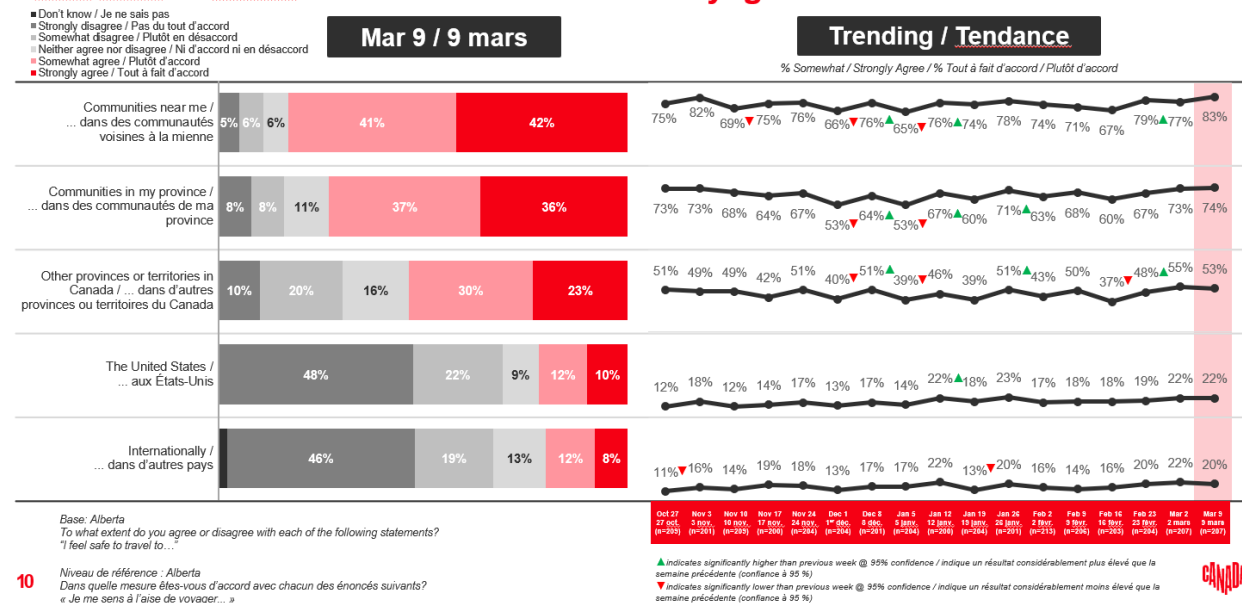
Source: [Destination BC, March 2021](#)

53% of Alberta residents feel safe to travel to other provinces or territories in Canada (+23 net score)

- In Destination Canada's latest Resident Sentiment report (Wave 37, March 9, 2021), 53% of Albertans stated they feel safe to travel to other provinces or territories in Canada, whereas 30% of Alberta residents expressed an opposing view, stating they did not feel safe, resulting in a net score of +23.
- 40% of Ontario residents stated they feel safe to travel to other provinces or territories in Canada, while an equal share (39%) of Ontario residents expressed an opposing view, stating they did not feel safe, resulting in a net score of +1.
- For comparison, BC residents have a net score of -9 in regards to feeling safe to travel to other provinces or territories.
- Destination Canada paused the March 16 Resident Sentiment Survey. The survey will resume March 23 with a new bi-weekly survey cadence.

Alberta

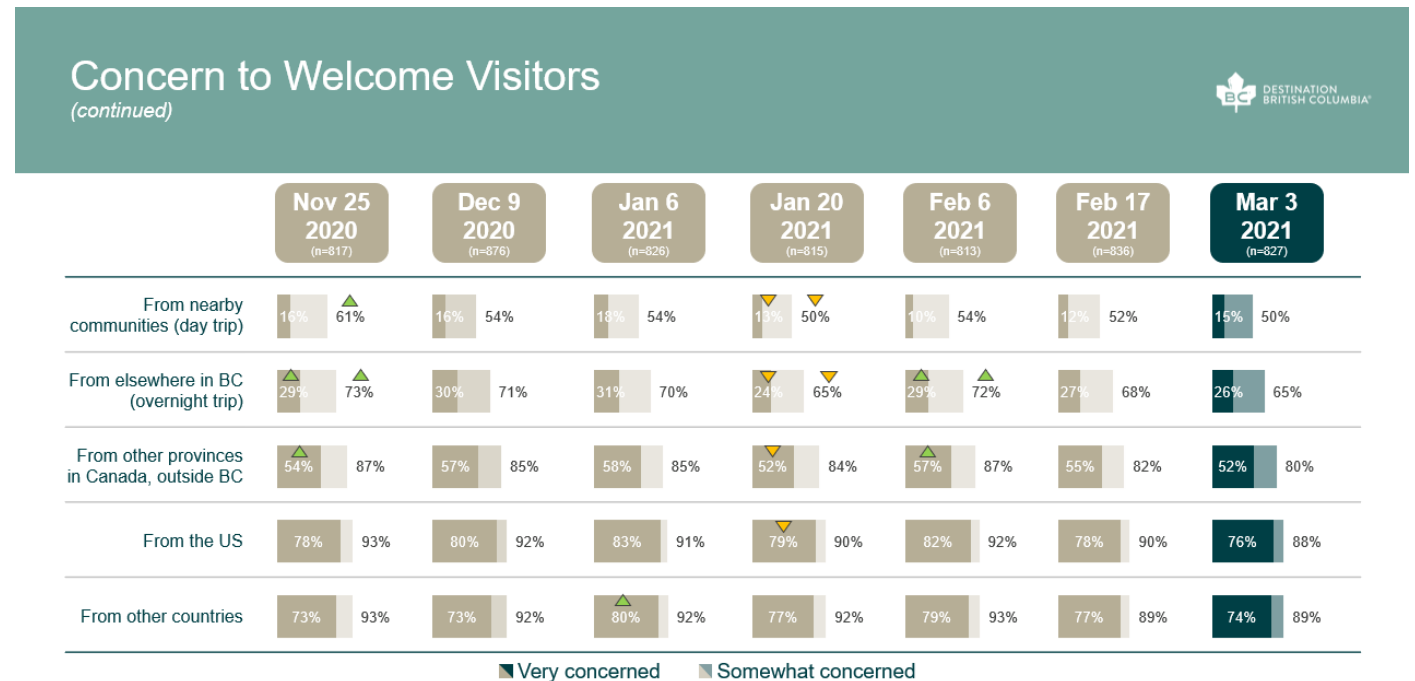
I feel safe to travel / Je me sens à l'aise de voyager



Source: [Destination Canada's Weekly Resident Sentiment, Wave 37, Leger, March 9, 2021](#)

50% of BC residents are concerned to welcome visitors from nearby communities

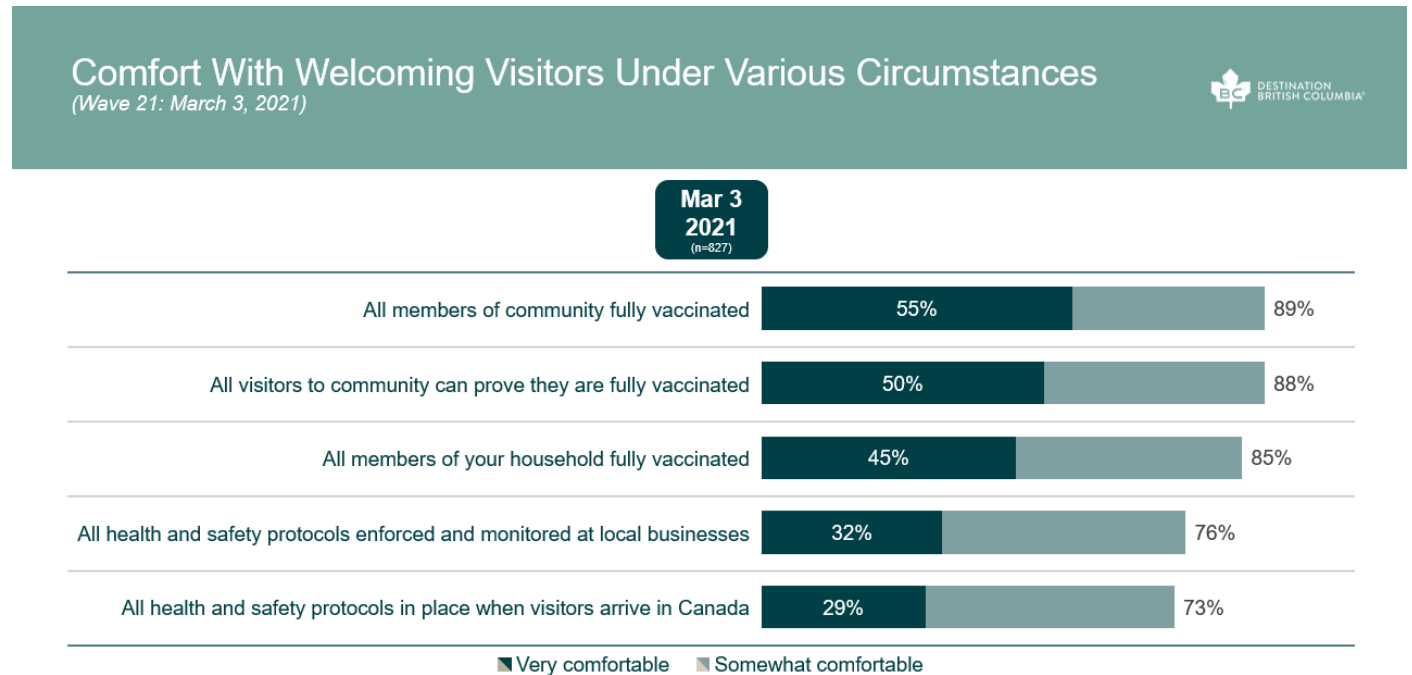
- In Destination BC's BC Residents' Public Perceptions Wave 21 (March 3, 2021) report, 50% of BC residents said they are concerned to welcome visitors from nearby communities in BC, with 65% concerned for visitors from elsewhere in BC, compared to 88% for the US and 89% from other countries.



Source: [Destination BC's BC Residents' Public Perceptions: COVID-19 Travel and Tourism Wave 21, Insights West, March 3, 2021](#)

89% of BC residents will be comfortable welcoming visitors when their community is fully vaccinated

- In Destination BC's BC Residents' Public Perceptions Wave 21 (March 3, 2021) report, 89% of BC residents said they will be comfortable welcoming visitors when all members of their community are fully vaccinated, with 88% comfortable when 'all visitors to the community can prove they are fully vaccinated', and 85% when 'all members of the household are fully vaccinated'.
- 76% of BC residents said they will be comfortable welcoming visitors when 'all health and safety protocols are enforced and monitored at local businesses' and 73% being comfortable when 'all health and safety protocols are in place when visitors arrive in Canada'.



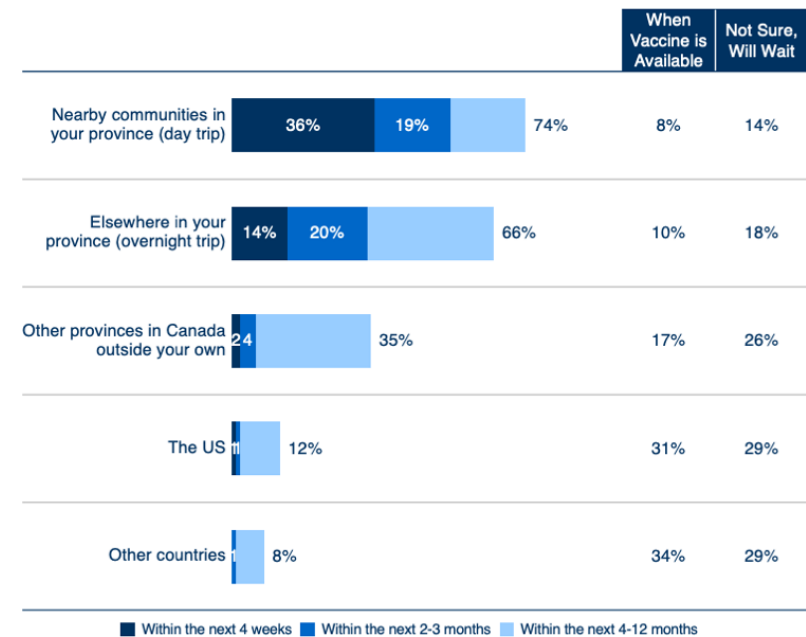
Source: [Destination BC's BC Residents' Public Perceptions: COVID-19 Travel and Tourism Wave 21, Insights West, March 3, 2021](#)

74% of Owner Direct vacation rental customers plan to visit nearby communities within the next 12 months

- A survey of Owner Direct vacation rental customers from BC and Alberta showed that 74% intend to travel to nearby communities in their province in the next 12 months.
- 19% intend to spend more than usual on travel compared to pre-COVID years, with 28% intending to spend less in the next year.
- 35% intend to stay in a vacation rental property with 17% choosing to rent a hotel, motel, or resort.

Insights West

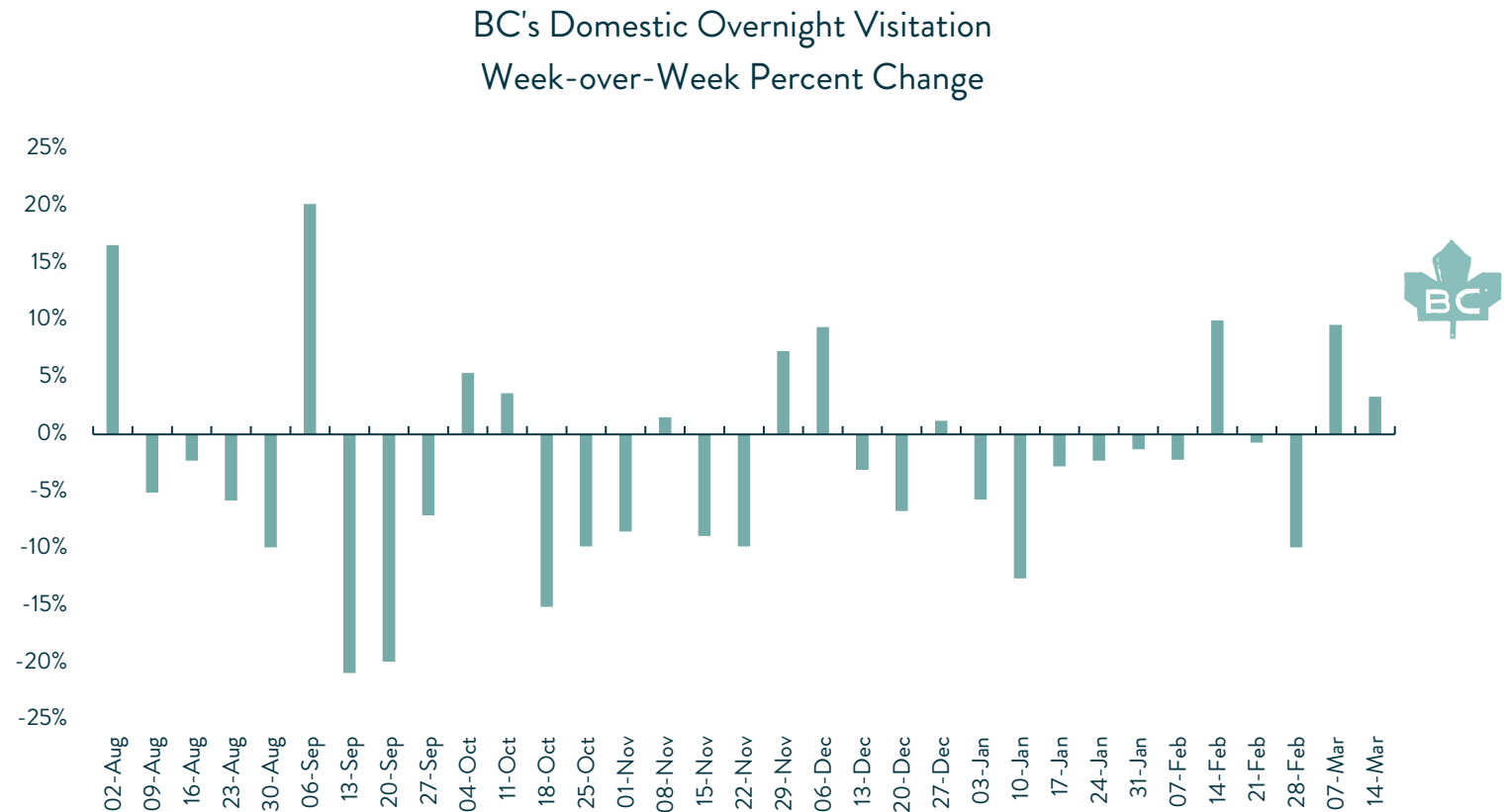
When, if at all, are you likely to travel to the following destinations for pleasure purposes?



Source: [Insights West, March 11, 2021](#)

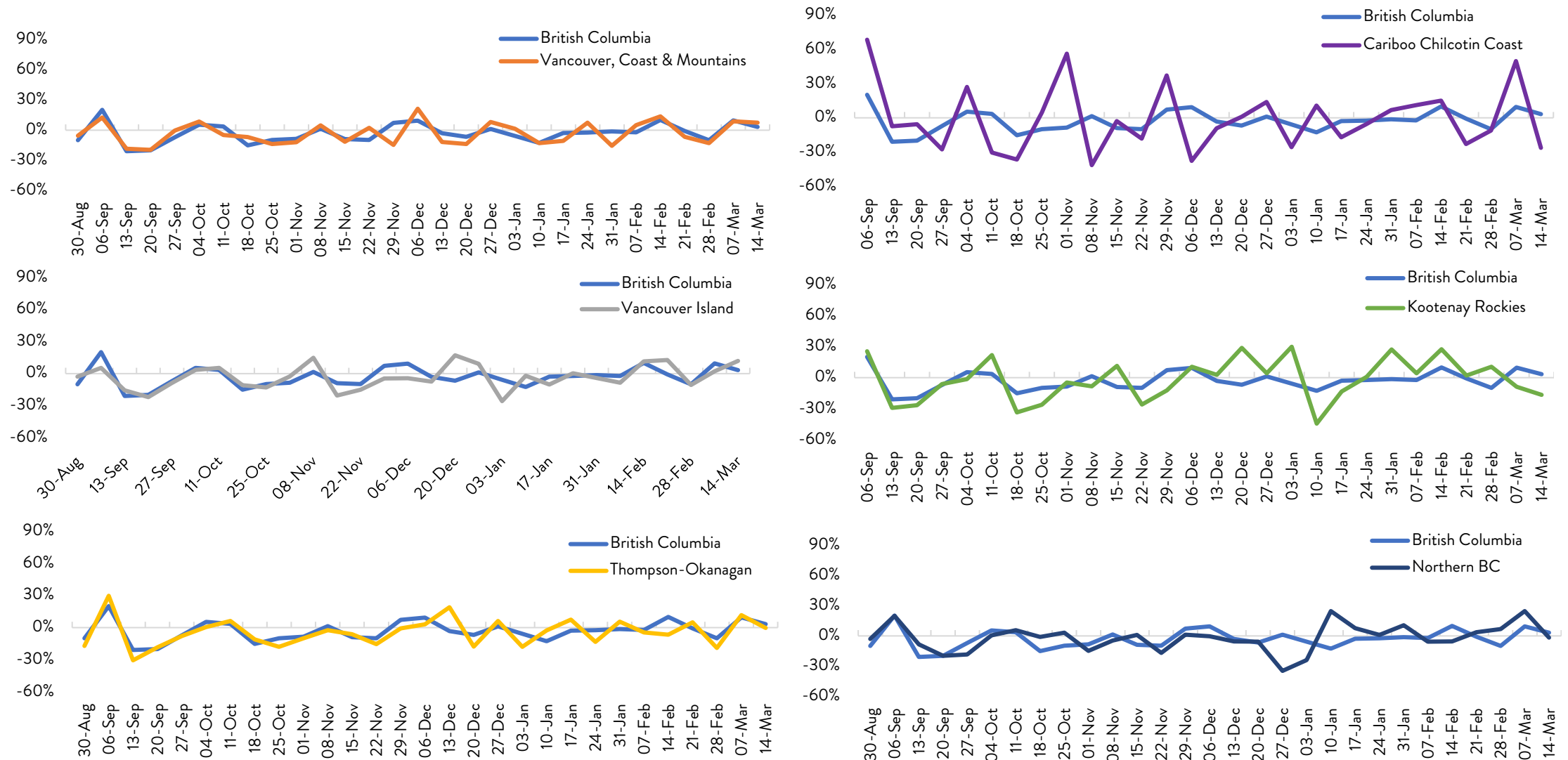
BC sees an increase of +3.3% in weekly domestic overnight visitation compared to previous week

- According to Environics Analytics Weekly COVID Tracker Report, during the week ending March 14, 2021, BC experienced a week-over-week increase of +3.3% in weekly domestic overnight visitation.
- Week-over-week increase in domestic overnight visitation were seen in two of the six tourism regions:
 - Vancouver Island (+12.0%)
 - Vancouver, Coast & Mountains (+7.4%)
- However, week-over-week decreases in domestic overnight visitation were seen in the remaining four tourism regions:
 - Cariboo Chilcotin Coast (-26.1%)
 - Kootenay Rockies (-16.5%)
 - Northern BC (-1.6%)
 - Thompson Okanagan (-0.2%)



Source: [Environics Analytics Weekly COVID Tracker Report, March 14, 2021](#)

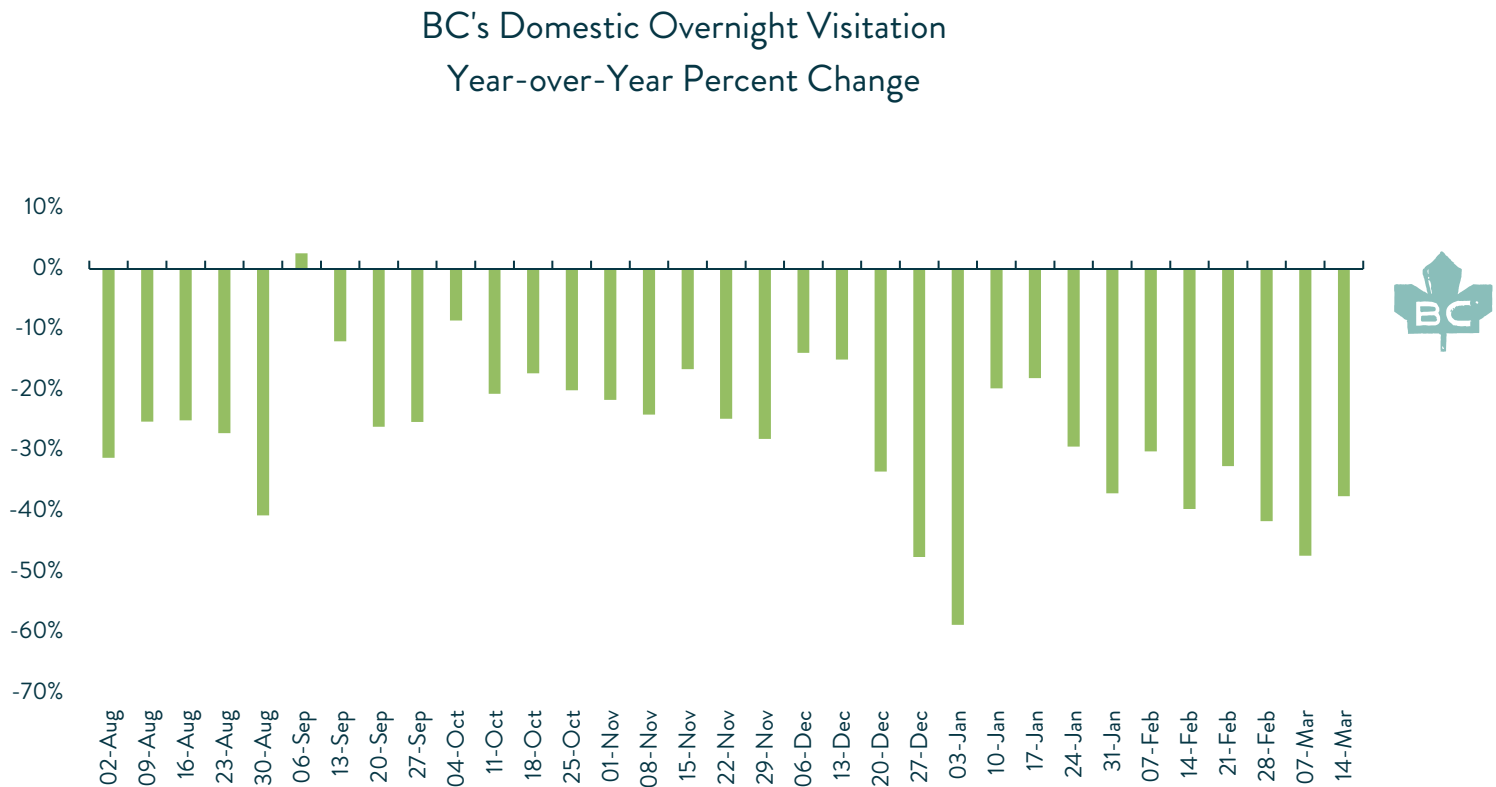
BC and Regional Domestic Overnight Visitation Week-over-Week Percent Change



Source: [Environics Analytics Weekly COVID Tracker Report, March 14, 2021](#)

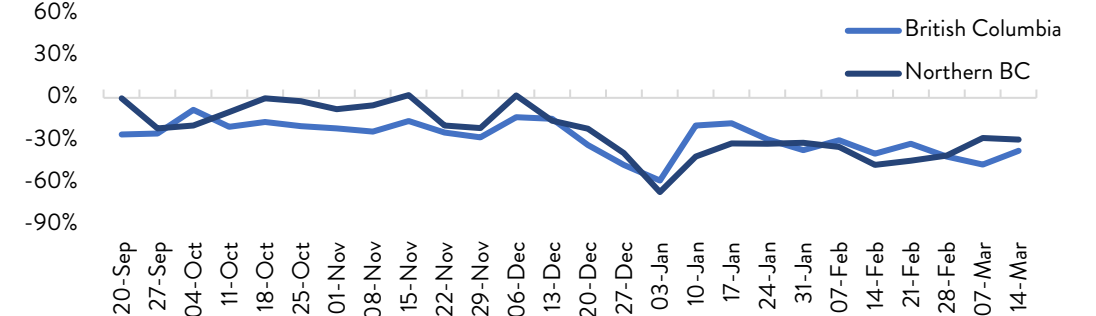
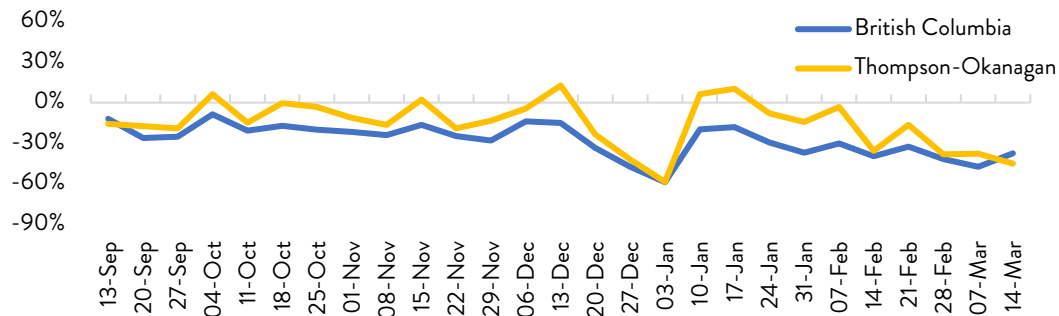
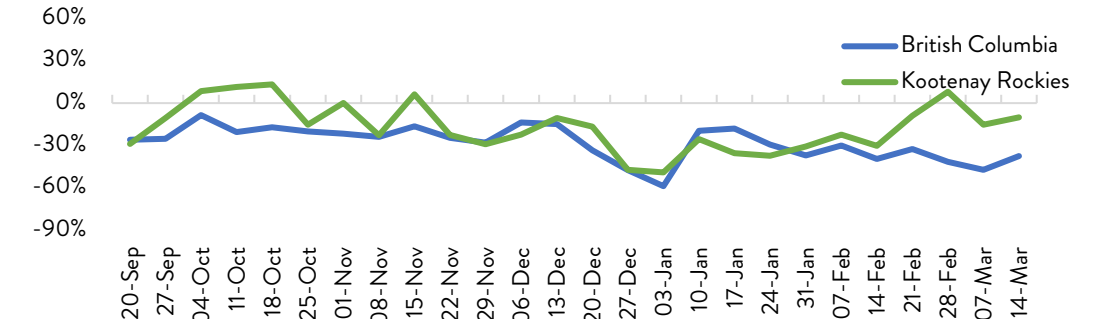
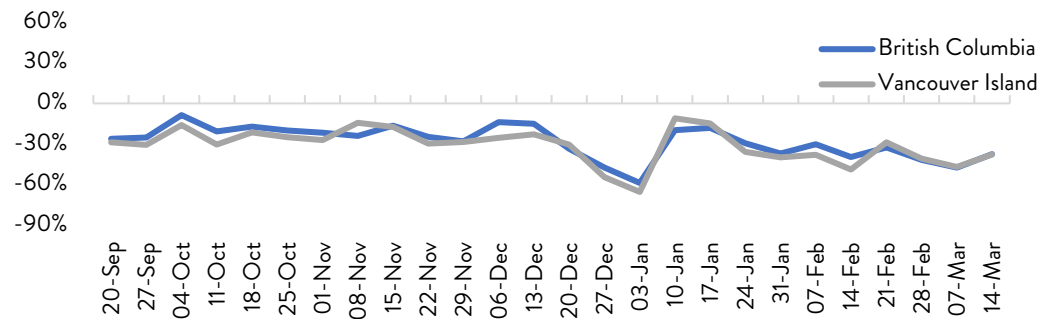
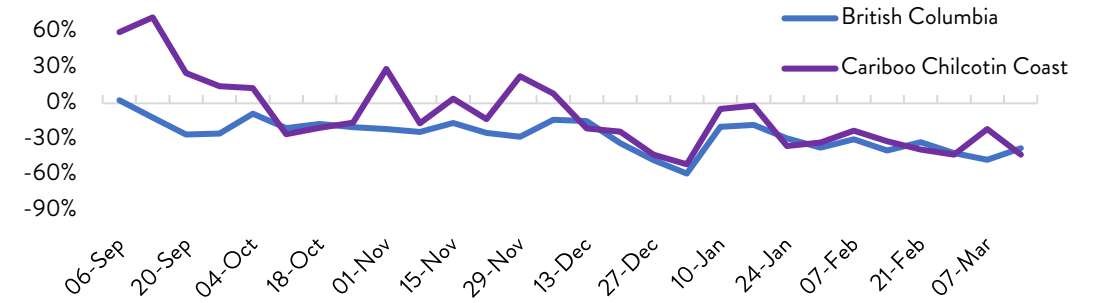
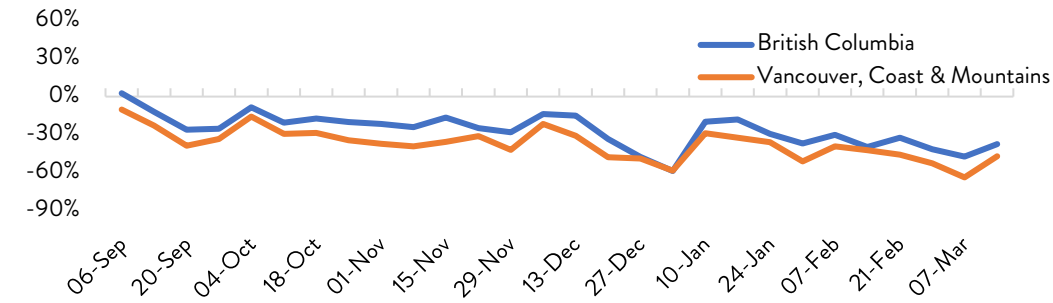
BC sees a decrease of -37.5% in weekly domestic overnight visitation compared to same period last year

- Environics Analytics also reports year-over-year analysis in the Weekly COVID Tracker Report.
- For the week ending March 14, 2021, weekly domestic overnight visitation was down -37.5% compared to the same week in 2020.
- A year-over-year decrease in weekly visitation was seen across the province in each tourism region:
 - Vancouver, Coast & Mountains (-47.0%)
 - Thompson Okanagan (-45.0%)
 - Cariboo Chilcotin Coast (-42.9%)
 - Vancouver Island (-37.8%)
 - Northern BC (-29.7%)
 - Kootenay Rockies (-10.2%)



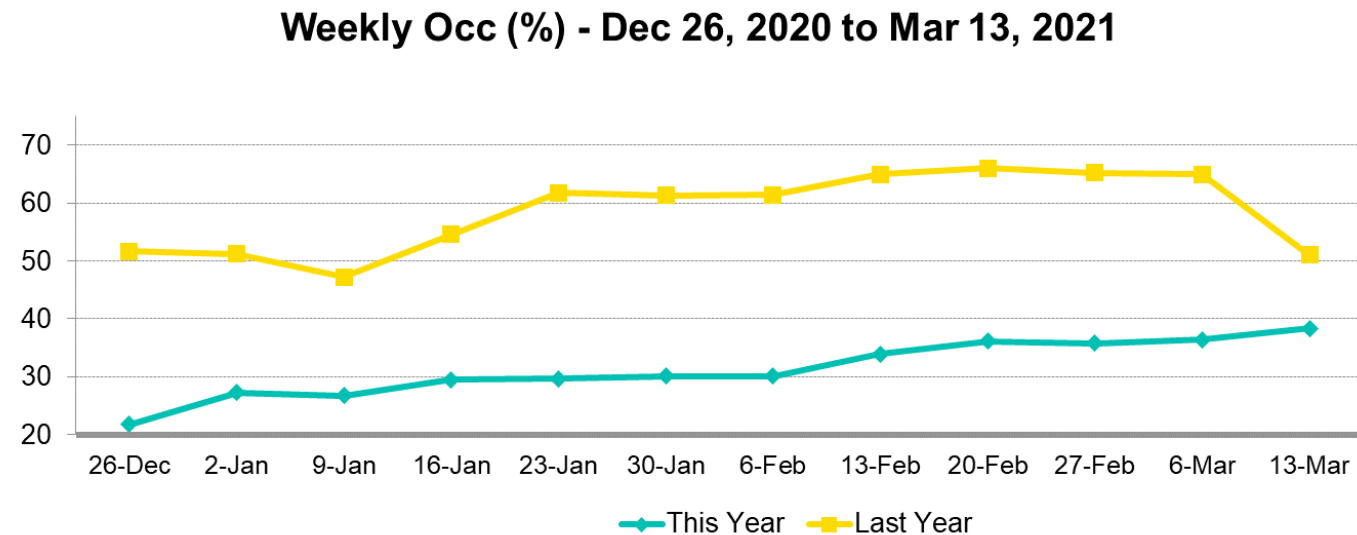
Source: [Environics Analytics Weekly COVID Tracker Report, March 14, 2021](#)

BC and Regional Domestic Overnight Visitation Year-over-Year Percent Change



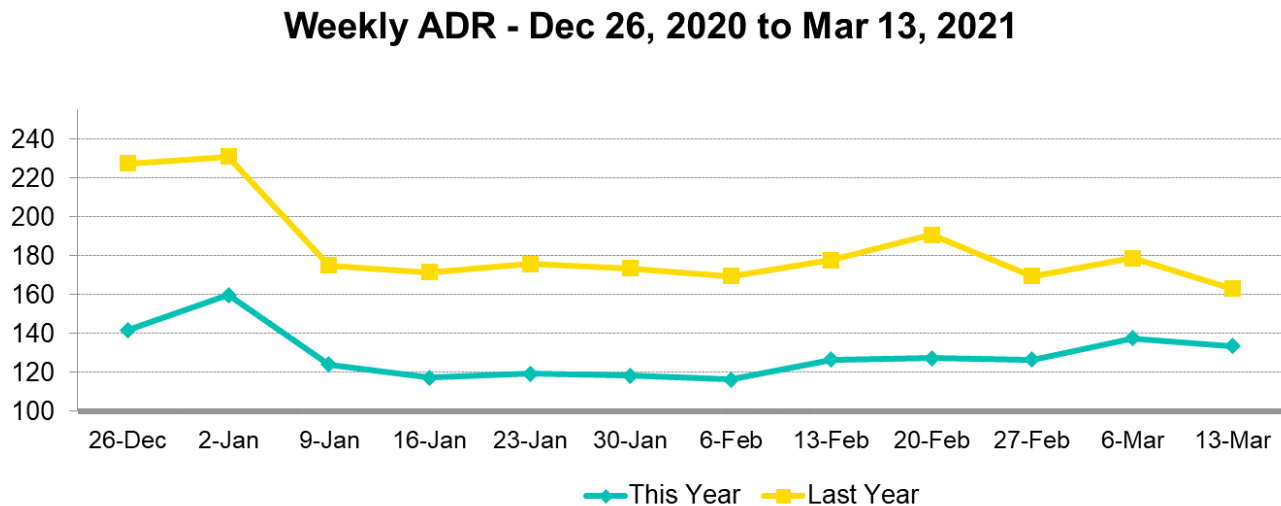
BC's occupancy rate (38.3%) up +2.1 points from the previous week

- STR, an agency which reports BC's hotel performance, shows the average weekly occupancy for BC was 38.3% for the week of March 7 – March 13, 2021. This represents an increase of +2.1 points from the previous week and a decrease of -12.7 points compared to a similar period in 2020.



BC's average daily rate (\$133.42) up +0.1% from the previous week

- STR, an agency which reports BC's hotel performance, shows BC's average daily rate (ADR) was \$133.42 for the week of March 6 – March 13, 2021. This represents an increase of +0.1% from the previous week and a decrease of -18.1% compared to a similar period in 2020.



British Columbia's Hotel Occupancy Rate and Average Daily Room Rate (ADR)

	Mar. 7 - 13, 2021 Occupancy Rate	Week-over-Week Mar. 7 - 13, 2021 vs. Feb. 28 - Mar. 6, 2021 Occupancy Point Change	Year-over-Year Mar. 7 - 13, 2021 vs. Mar. 8 - 14, 2020 Occupancy Point Change	Mar. 7 - 13, 2021 ADR	Week-over-Week Mar. 7 - 13, 2021 vs. Feb. 28 - Mar. 6, 2021 ADR Percent Change	Year-over Year Mar. 7 - 13, 2021 vs. Mar. 8 - 14, 2020 ADR Percent Change
British Columbia	38.3%	+2.1	-12.7	\$133.42	+0.1%	-18.1%
Vancouver (City of)	22.9%	+1.9	-26.5	\$154.88	+2.7%	-18.5%
Whistler	26.7%	-0.6	-40.1	\$254.70	-8.8%	-36.5%
Victoria	35.0%	+1.6	-13.7	\$122.31	+4.8%	-12.0%
Kelowna	31.1%	+2.1	-15.4	\$106.63	+1.4%	-16.6%
Kamloops	48.7%	+8.2	+8.6	\$92.07	+2.4%	-13.3%
Richmond	58.8%	+3.5	+0.0	\$194.40	-0.5%	+23.0%



BC's revenue per available room (RevPAR) (\$51.13) up +6.0% from the previous week

- STR, an agency which reports BC's hotel performance, shows BC's revenue per available room (RevPAR) was \$51.13 for the week of March 7 – March 13, 2021. This represents an increase of +6.0% from the previous week and a decrease of -38.5% compared to a similar period in 2020.

	Mar. 7 - 13, 2021 RevPAR	Week-over-Week Mar. 7 - 13, 2021 vs. Feb. 28 - Mar. 6, 2021 RevPAR Percent Change	Year-over-Year Mar. 7 - 13, 2021 vs. Mar. 8 - 14, 2020 RevPAR Percent Change
British Columbia	\$51.13	+6.0%	-38.5%
Vancouver (City of)	\$35.45	+12.1%	-62.3%
Whistler	\$68.11	-10.8%	-74.6%
Victoria	\$42.83	+9.9%	-36.7%
Kelowna	\$33.18	+8.6%	-44.2%
Kamloops	\$44.88	+23.2%	+5.1%
Richmond	\$114.23	+5.8%	+22.9%



BC tourism employment in February 2021 was down -15% year-over-year

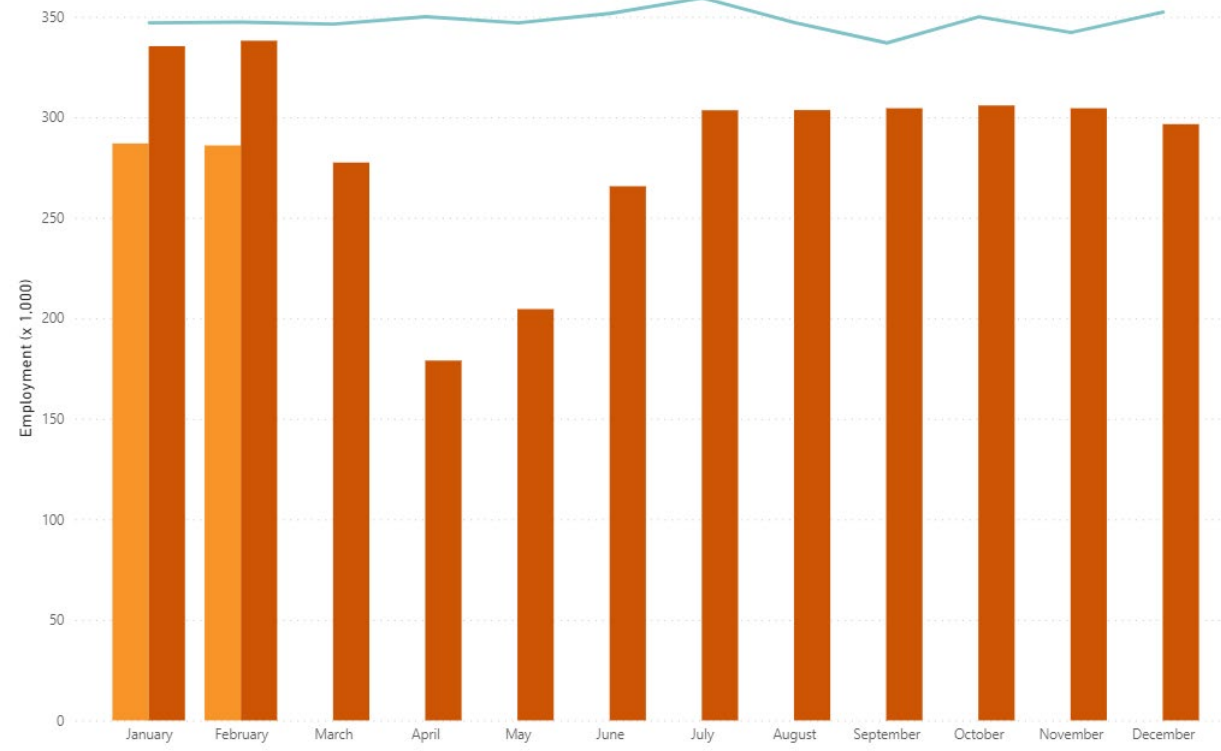
- According to Tourism HR Canada, tourism employment in BC was 286,000 in February 2021, down from 287,000 in January 2021 and 338,100 in February 2020. This is a -15% decrease year-over-year (down 52,100 employees).

British Columbia

Chart 1: Tourism Employment by Province

Tourism Employment (x 1,000)

2021 Employment 2020 Employment 2019 Employment



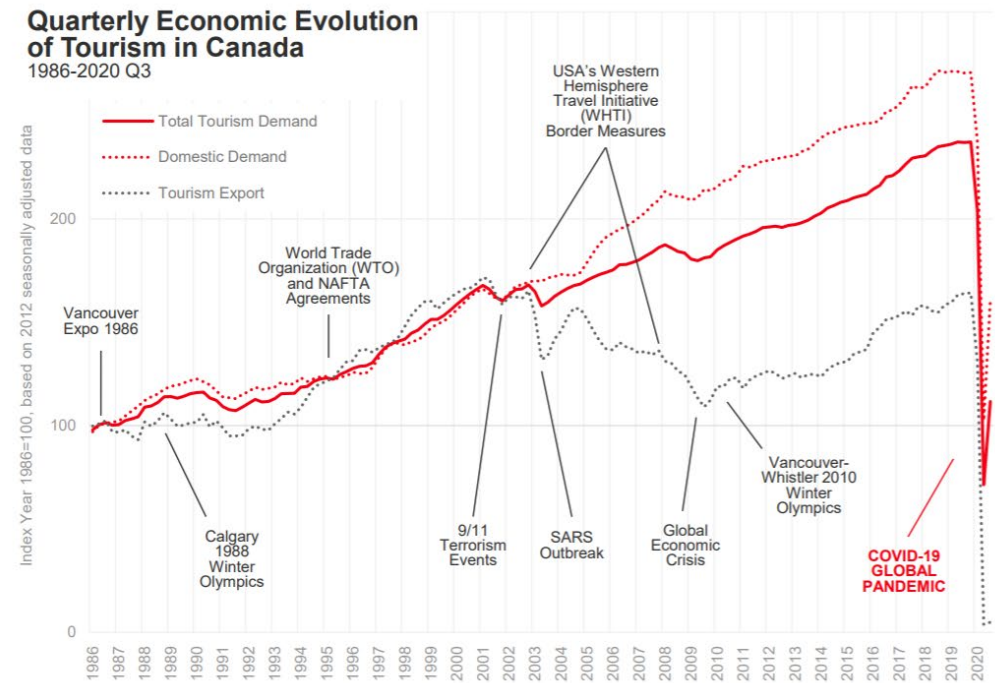
Source: [Tourism HR Canada, March 2021](#)



Destination Canada reports Canada's 2020 tourism losses are the greatest on record

- Destination Canada's Revisiting Tourism report shows that 2020 was the worst recorded loss to tourism on record.

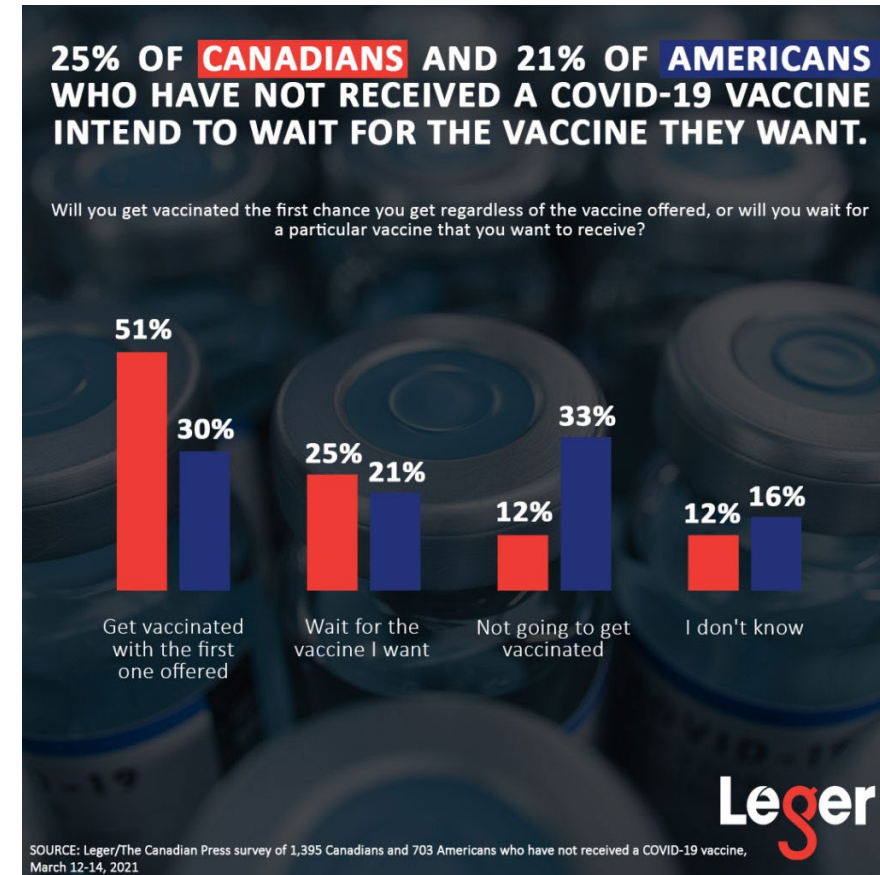
2020 losses to Canada's tourism sector are the worst on record



Source: [Revisiting Tourism, Destination Canada, March 2021](#)

Leger reports 51% of Canadians intend to get vaccinated with the first vaccine offered

- A recent survey by Leger showed that 51% of Canadians intend to get vaccinated with the first vaccine offered, while 25% of Canadians intend to wait for their preferred vaccine, and 12% don't intend to get vaccinated.



Source: [Leger, March 16, 2021](#)

Skift commented on the disparate effects of the shutdown on Indigenous tourism in Canada

- In a recent article by Skift, the disparate effects of the pandemic shutdown on Indigenous tourism and the immigrant workforce in Canada were discussed. The article states that “without financial assistance and without international travelers, up to 66 percent of [Indigenous] businesses may fall off the tourism scene... COVID impact data also shows deepening inequality because of COVID’s disparate impact on women, who make up the majority of the travel services workforce, as well as on immigrants, who make up 26 percent of tourism employees, higher than the national 23.8 percent.”

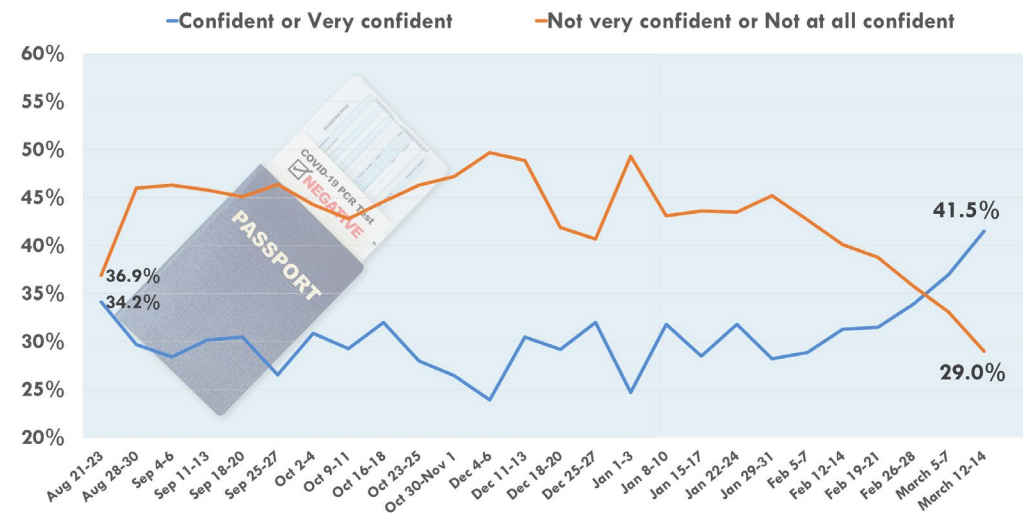


Source: [Skift, March 16, 2021](#)

Destination Analysts reports 41.5% of American travellers feel they can travel safely

- Destination Analysts, a US-based tourism research company, shared that 41.5% of American travellers feel confident that they can travel safely in the current pandemic environment, continuing an upward trend. Only 29% feel they cannot travel safely currently.
- The percentage of American travellers feeling confident that they can travel safely continues to grow weekly which corresponds positively with the growth in the number of Americans vaccinated. This trend can be expected to continue.

AMERICANS' INCREASING CONFIDENCE IN THEIR ABILITY TO TRAVEL SAFELY AUGUST 21, 2020 – MARCH 14, 2021



QUESTION: HOW CONFIDENT ARE YOU THAT YOU CAN TRAVEL SAFELY IN THE CURRENT ENVIRONMENT?

(Base: Waves 24-34 and 39-53 data. All respondents, 1,202, 1,246, 1,222, 1,205, 1,200, 1,205, 1,203, 1,203, 1,204, 1,203, 1,203, 1,204, 1,206, 1,201, 1,207, 1,206, 1,225, 1,205, 1,206, 1,209, 1,209, 1,216, 1,210, 1,204, 1,209 and 1,204 completed surveys.)

Destination Analysts
DO YOUR RESEARCH

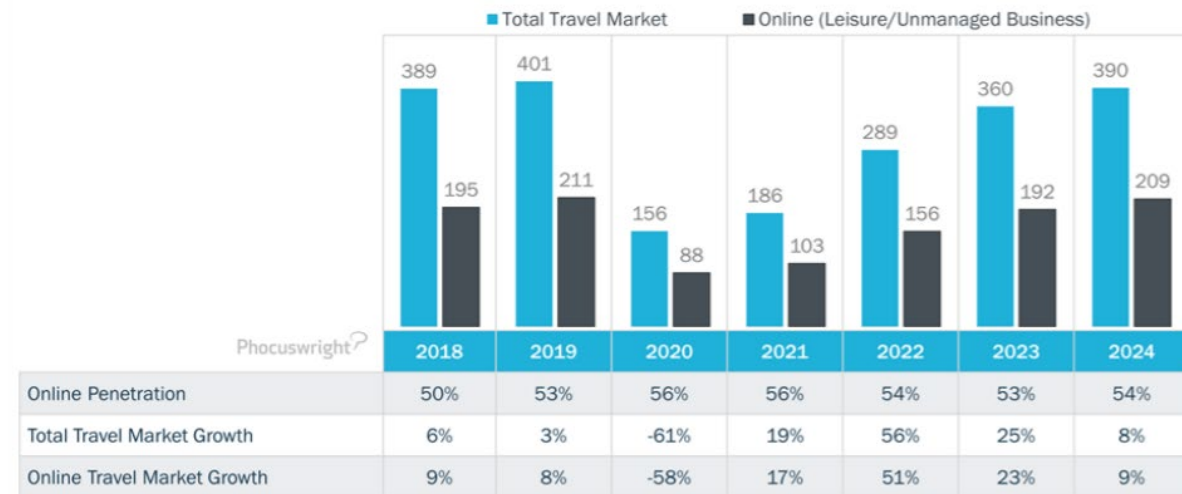


Source: [Destination Analysts, March 14, 2021](#)

Phocuswright shares the US travel market is forecasted to grow to \$289 billion USD in 2022

- A report by Phocuswright forecasted total US travel markets to grow from \$186 billion USD in 2021 to \$289 billion USD in 2022, \$360 billion USD in 2023, and \$390 billion USD in 2024.
- Online travel penetration is expected to reach 56% in 2021, 54% in 2022, 53% in 2023, and 54% in 2024.

Figure 1: U.S. Total and Online Travel Markets (US\$B), Online Penetration and Growth (%), 2018-2024



Source: [U.S. Travel Market Report 2020-2024, Phocuswright, March 2021](#)



Travel Agent Central reports 32% of US agency client travellers have booked their next trip

- According to Travel Agent Central, 32% of the Travel Leaders Network's member agency clients have already booked their next trip, with 24% planning their next vacation.
- 44% of travellers said they have already been vaccinated, while 41% intend to get a vaccination once eligible.



Source: [Travel Agent Central, March 16, 2021](#)

Tourism and COVID-19 dashboard and reporting resources

- Destination BC's new [Tourism Industry Dashboard](#) tracks statistics across tourism-related industries including accommodations, food & beverage, and transportation.
- Destination BC's [Signals & Sentiment dashboard](#) follows core markets 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.
- The BC Tourism Resiliency Network hosts [tourism impact reports and travel pattern studies](#).
- The Travel and Tourism Research Association links to many [research and 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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