



DESTINATION
BRITISH COLUMBIA®

COVID-19 Research Roundup

May 31, 2021



Revelstoke, Kootenay Rockies

BC's Restart Plan

We are in Step 1 of [BC's Restart Plan](#), a 4-step plan launched on May 25, 2021. The earliest date to progress to Step 2 is June 15.

Province-wide restrictions

Although some public health restrictions are lifting and recreation travel within your Regional Health Zone is now permitted, non-essential travel between the three Regional Health Zones remains restricted until Step 2 of the plan. Safety and health protocols such as mask wearing and physical distancing will also remain in place and mandatory until at least June 15 (Step 2). Most insights noted in this Research Roundup were gathered before the latest provincial announcement on May 25, 2021.

On May 18, 2021, Canadian and US officials agreed to extend the closure of the border between the two countries to non-essential travel until at least June 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:

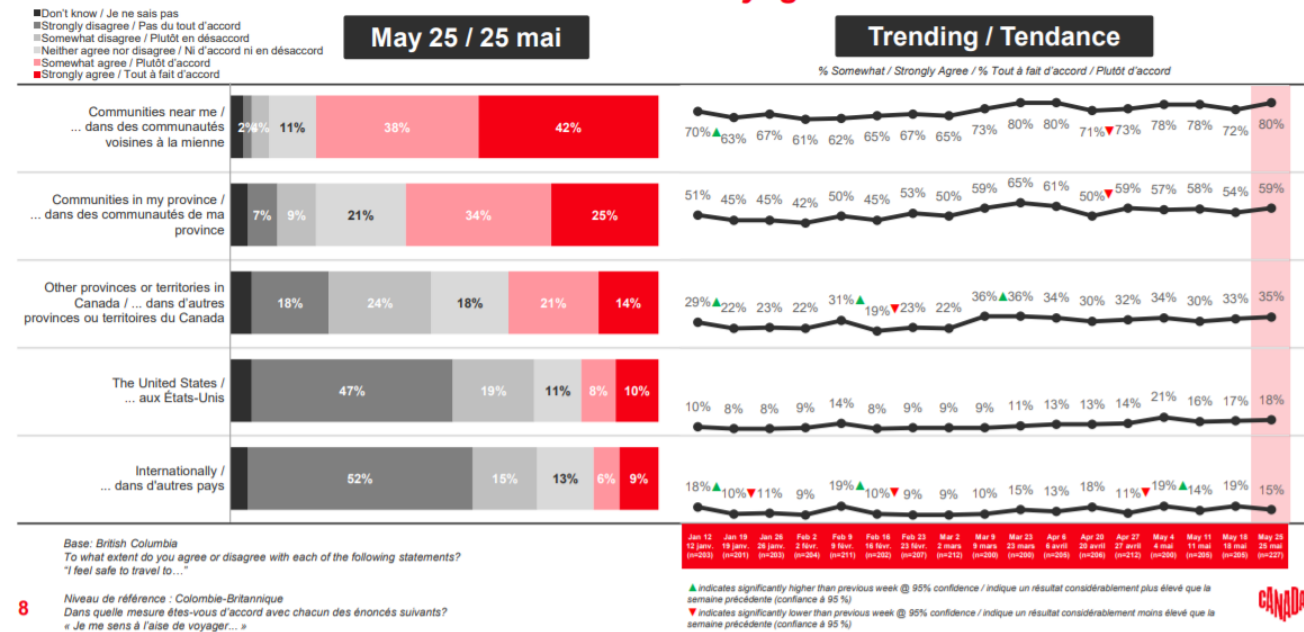
- Destination Canada reports 80% of BC residents now feel safe travelling to nearby communities
- 64% of BC residents intend to travel elsewhere in BC within the next 2-3 months
- BC weekly domestic overnight visitation is up +18.1% from the start of the April 23 travel restrictions
- BC sees an increase of +8.8% in weekly domestic overnight visitation compared to the same period in 2020
- BC's occupancy rate (33.1%) up +2.5 points from the previous week
- BC's average daily rate (\$131.59) up +2.1% from the previous week
- BC's revenue per available room (RevPAR) (\$43.51) up +10.4% from the previous week
- CBRE forecasts that RevPAR across Canada in 2021 will see a +16% increase compared to 2020
- Leger reveals 53% of Canadians think safety measures are being relaxed at the right pace
- Ipsos reveals that most Canadians support vaccine passports for a variety of indoor and outdoor activities
- Destination Analysts reports that 22.6% of American travellers had travel plans for the Memorial Day holiday weekend
- Skift develops 'The 2021 Guide to Safer Meetings for Hotels and Venues'
- Vancouver issues 26 film permits between September 2020 and March 2021
- Tourism and COVID-19 dashboard and reporting resources

Destination Canada reports 80% of BC residents now feel safe travelling to nearby communities

- In Destination Canada's latest Resident Sentiment report (May 25, 2021), 80% of BC residents stated they would feel safe travelling to nearby communities. This represents an increase of +8 points from the previous week (May 18) and likely reflects growing optimism as COVID-19 case numbers continue to fall across the province.
- 59% of BC residents stated they would feel safe travelling to other communities in their province. This represents an increase of +5 points compared to the previous week.
- Only 35% of BC residents stated they would feel safe travelling to other provinces. This represents a smaller increase of only +2 points compared to the previous week.

British Columbia / Colombie-Britannique

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

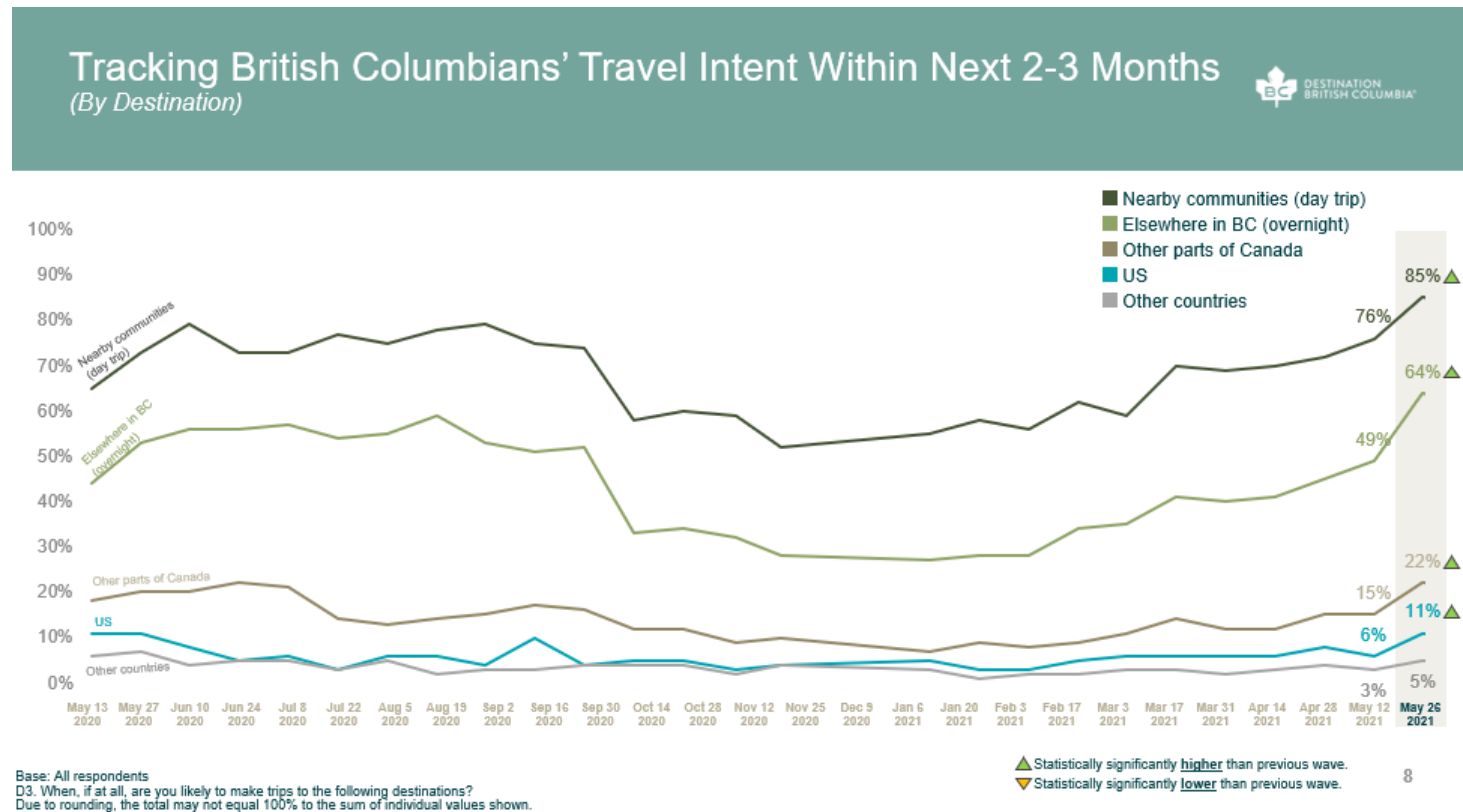


Source: [Destination Canada's Weekly COVID-19 Resident Sentiment, May 25, 2021](#)



64% of BC residents intend to travel elsewhere in BC within the next 2-3 months

- In Destination BC's BC Residents' Public Perceptions Wave 27 (May 26, 2021) report, 64% of British Columbians said they intend to travel to other communities within BC in the next 2-3 months. This is a 15%+ increase from the previous wave and likely represents growing optimism about the ability to travel over the summer in response to BC's Restart Plan, including a tentative date of June 15 as the earliest point to resume provincial travel.
- 85% of BC residents said they intend to travel to nearby communities within the next 2-3 months. This is a +9% increase from the previous wave (May 12).
- BC Residents' travel intent over the next 2-3 months to other provinces and the US also rose +7% and +5% respectively, to 22% and 11%.

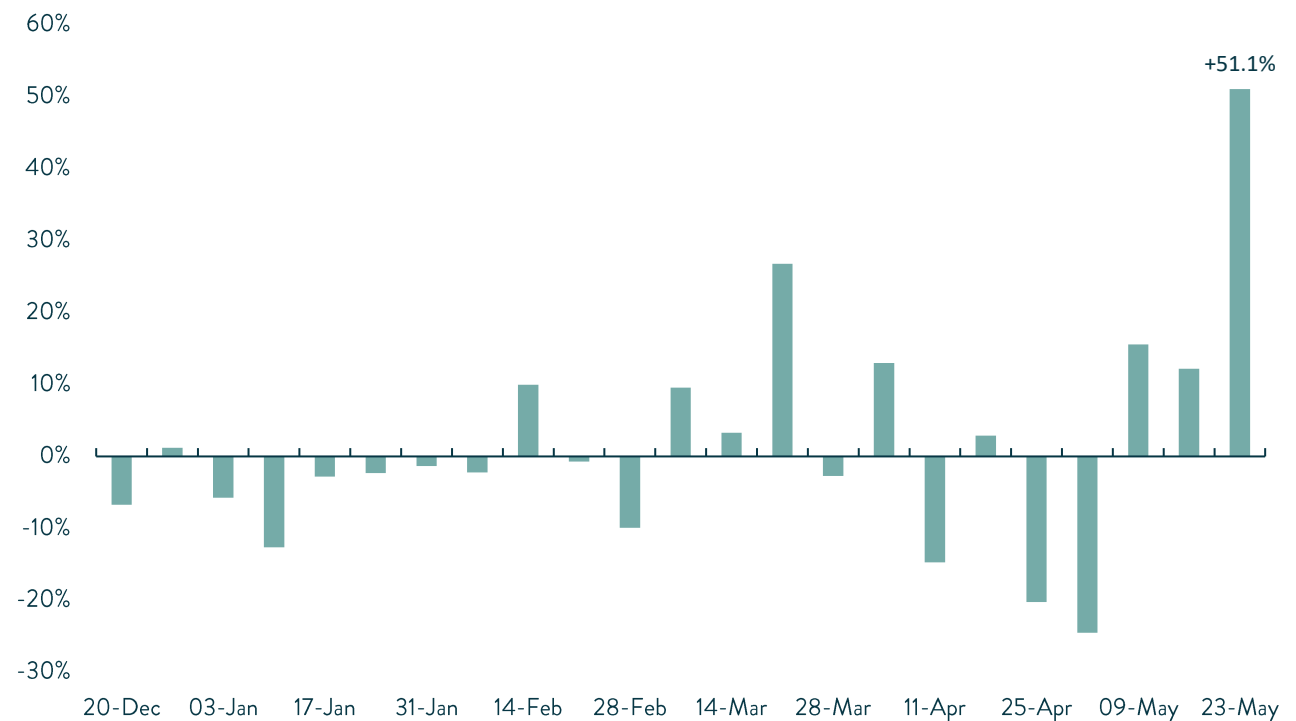


Source: [Destination BC's BC Residents' Public Perceptions: COVID-19 Travel and Tourism Wave 26, Insights West, May 12, 2021](#)

BC weekly domestic overnight visitation is up +18.1% from the start of the April 23 travel restrictions

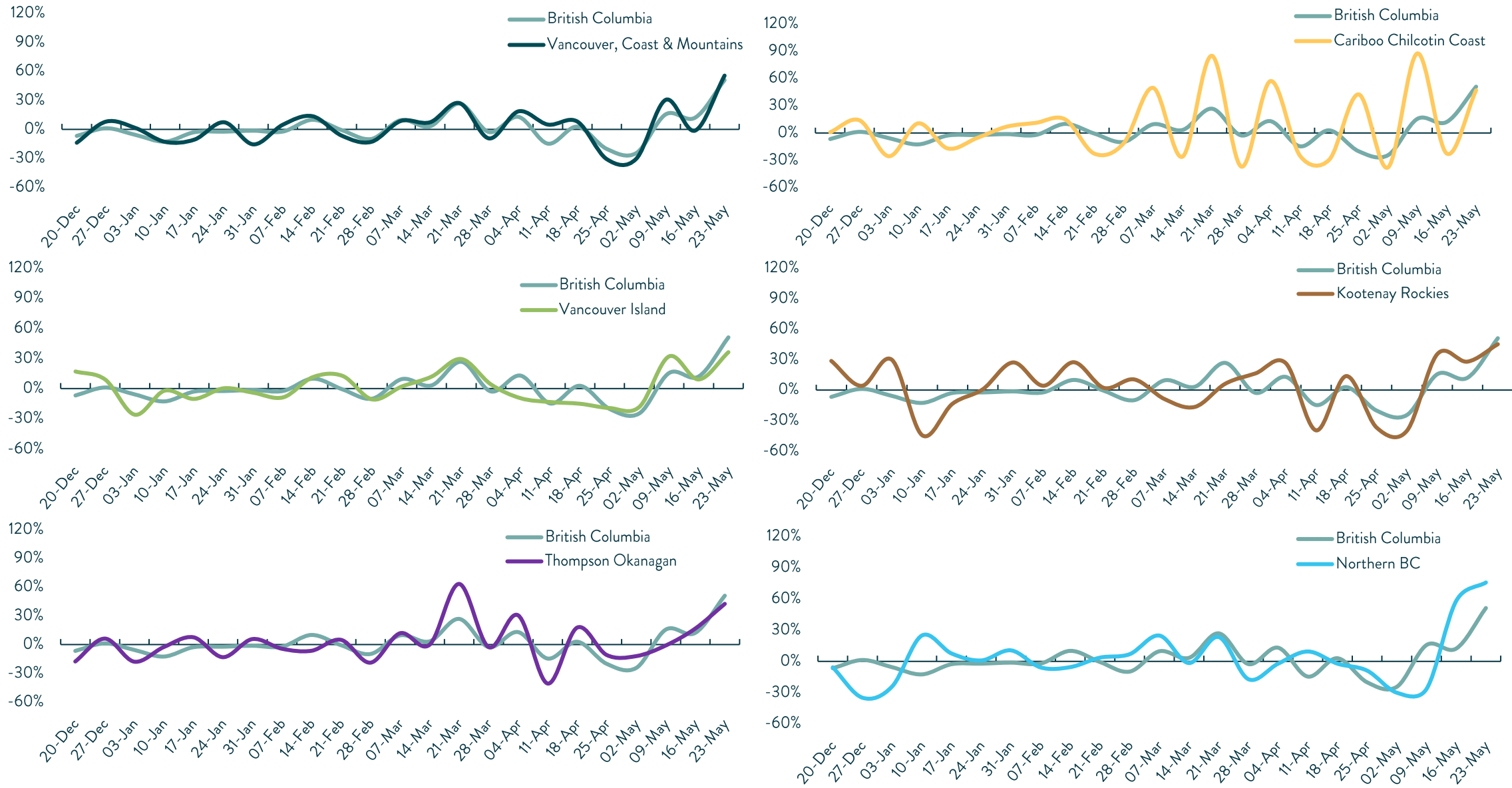
- According to Environics Analytics Weekly COVID Tracker Report, during the week ending May 23, 2021, BC experienced a week-over-week increase of +51.1% in weekly domestic overnight visitation. This is +18.1% higher than from the start of the April 23 provincial travel restrictions.
- Week-over-week increases in domestic overnight visitation were seen in all six of the tourism regions across the province:
 - Northern BC (+75.8%)
 - Vancouver, Coast & Mountains (+55.7%)
 - Cariboo Chilcotin Coast (+47.2%)
 - Kootenay Rockies (+45.1%)
 - Thompson Okanagan (+42.5%)
 - Vancouver Island (+36.3%)

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



Source: [Environics Analytics Weekly COVID Tracker Report, May 23, 2021](#)

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

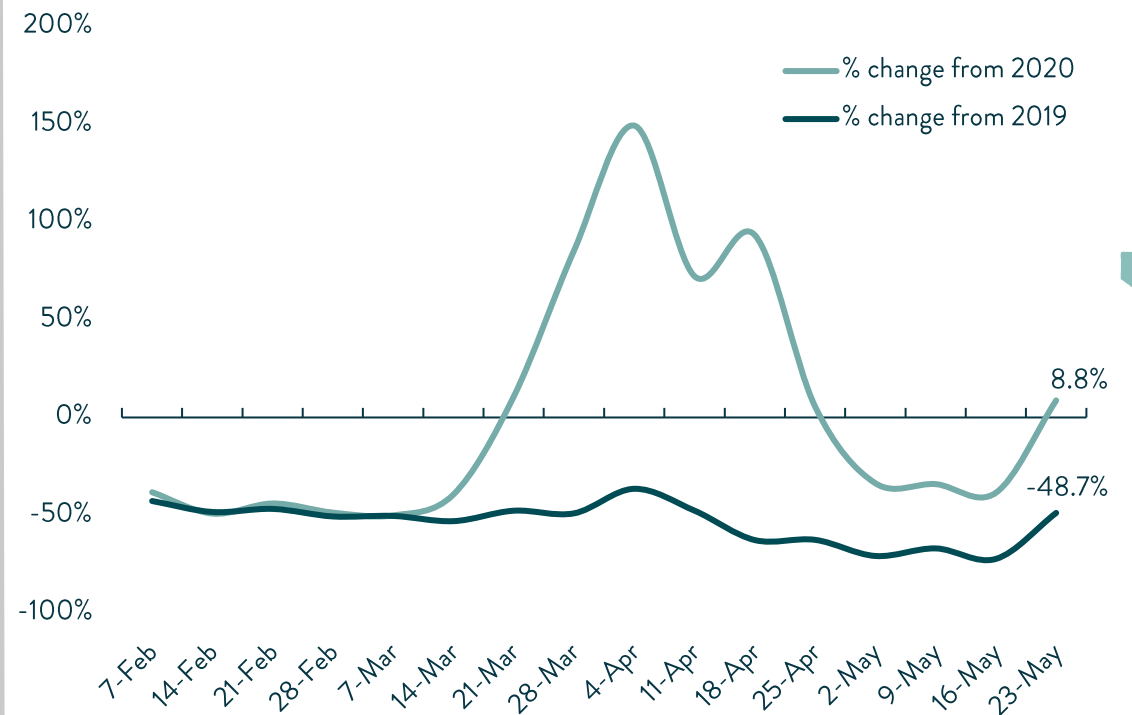


Source: [Environics Analytics Weekly COVID Tracker Report, May 23, 2021](#)

BC sees an increase of +8.8% in weekly domestic overnight visitation compared to the same period in 2020

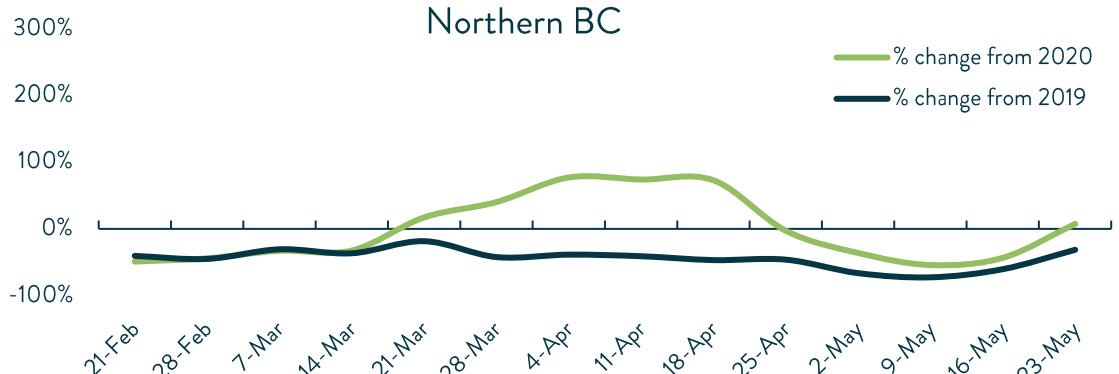
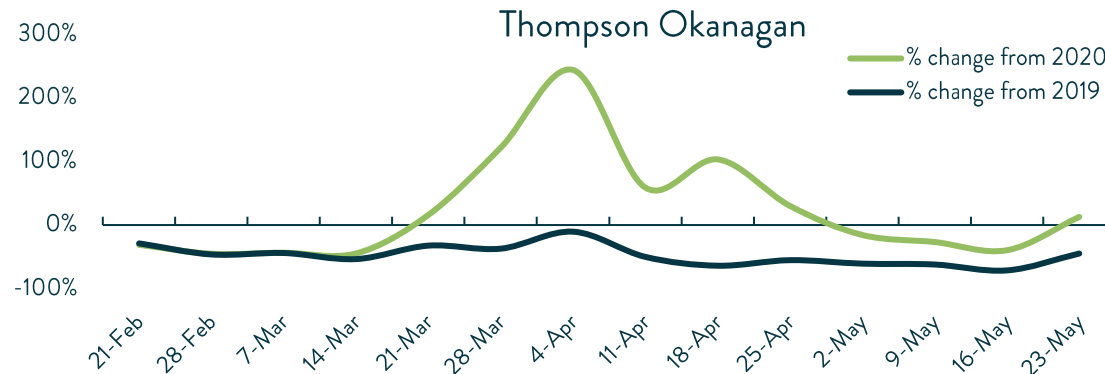
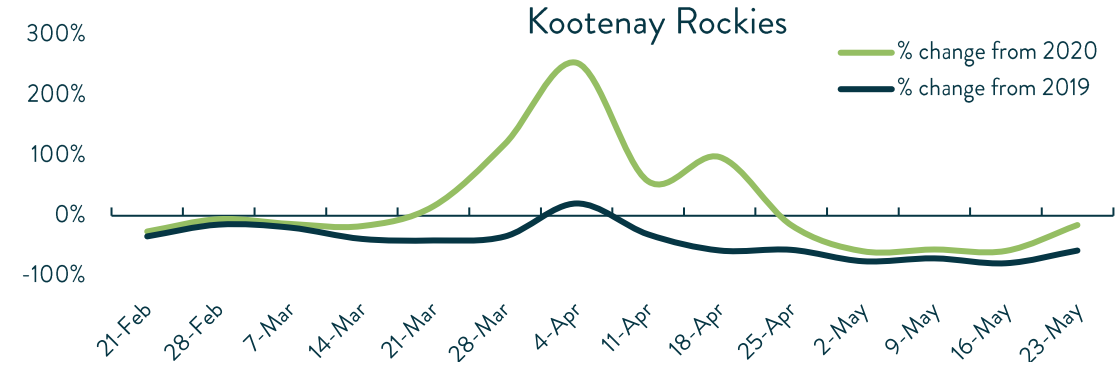
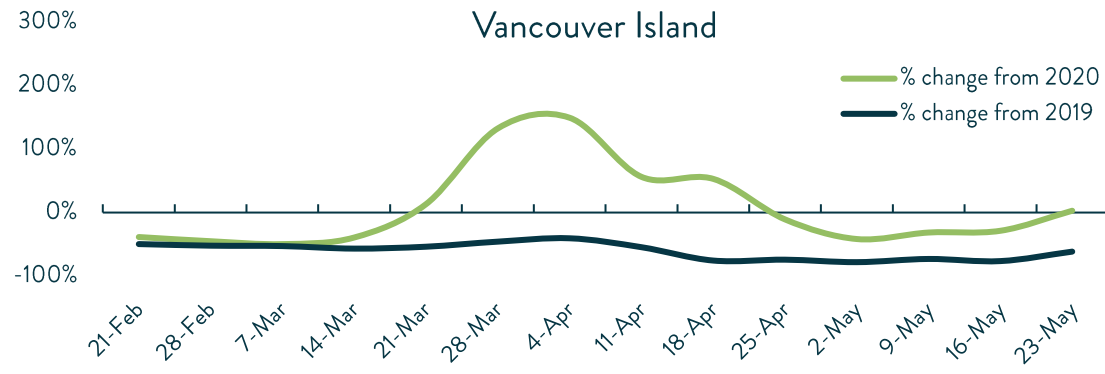
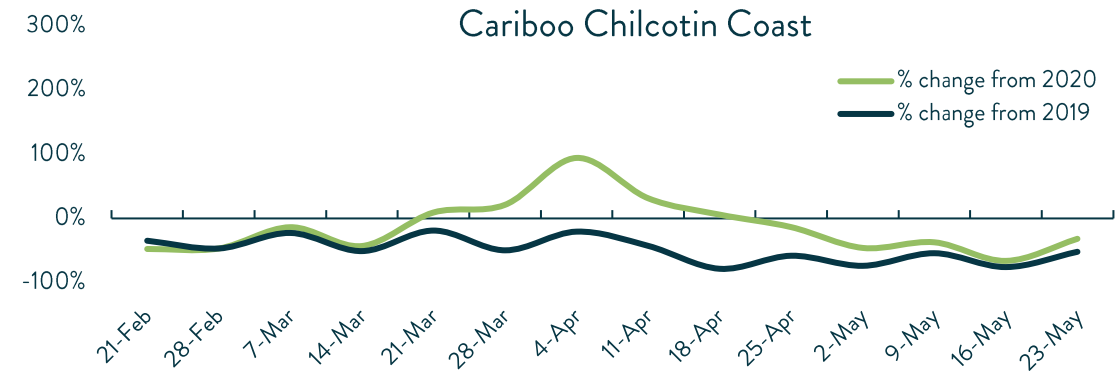
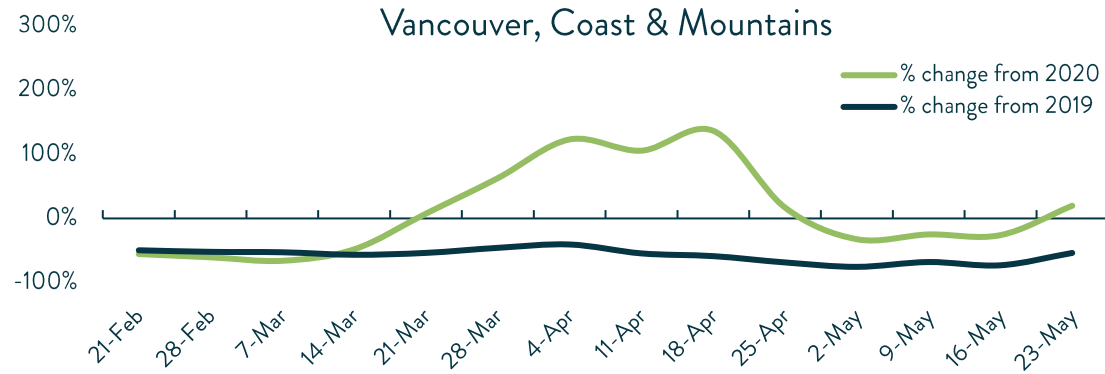
- For the week ending May 23, 2021, Environics Analytics reported that weekly domestic overnight visitation was up +8.8% compared to the same week in 2020. Compared to the same week in 2019, weekly domestic overnight visitation was down -48.7%.
- In four of the tourism regions across the province, year-over-year increases in weekly visitation were seen when compared to the same period in 2020. All regions continue to see decreases when compared to the same period in 2019.
 - Vancouver, Coast & Mountains (+19.9% over 2020; -53.7% over 2019)
 - Thompson Okanagan (+12.9%; -44.9%)
 - Northern BC (+7.6%; -31.5%)
 - Vancouver Island (+2.7%; -61.3%)
 - Kootenay Rockies (-15.0%; -57.6%)
 - Cariboo Chilcotin Coast (-31.5%; -51.8%)

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



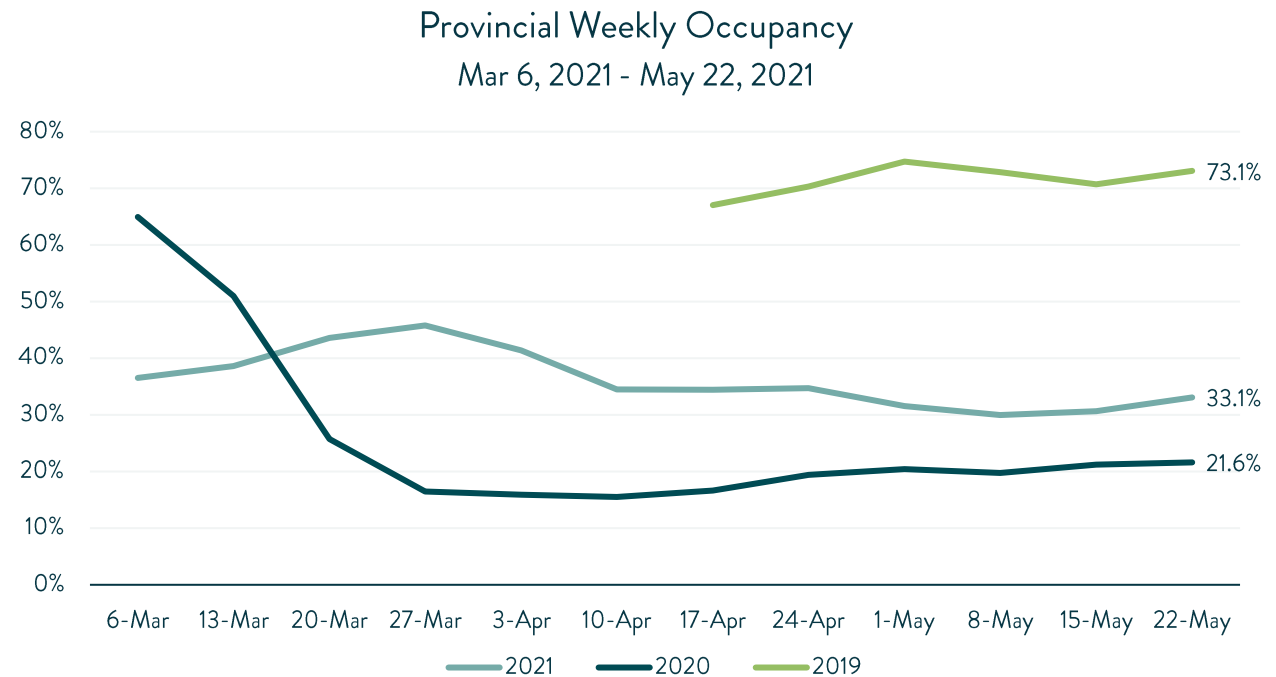
Source: [Environics Analytics Weekly COVID Tracker Report, May 23 2021](#)

Regional Domestic Overnight Visitation Year-over-Year Percent Change



BC's occupancy rate (33.1%) up +2.5 points from the previous week

- STR, an agency which reports BC's hotel performance, shows the average weekly occupancy for BC was 33.1% for the week of May 16 – May 22, 2021. This represents an increase of +2.5 points from the previous week.
- It also represents an increase of +11.4 points compared to a similar period in 2020 and a decrease of -40.0 points compared to 2019.



*Please note data for 2019 is only available starting for the week April 7 - 13, 2019

Source: [2021 STR, STR Global Ltd - STR May 16 – May 22, 2021](#)



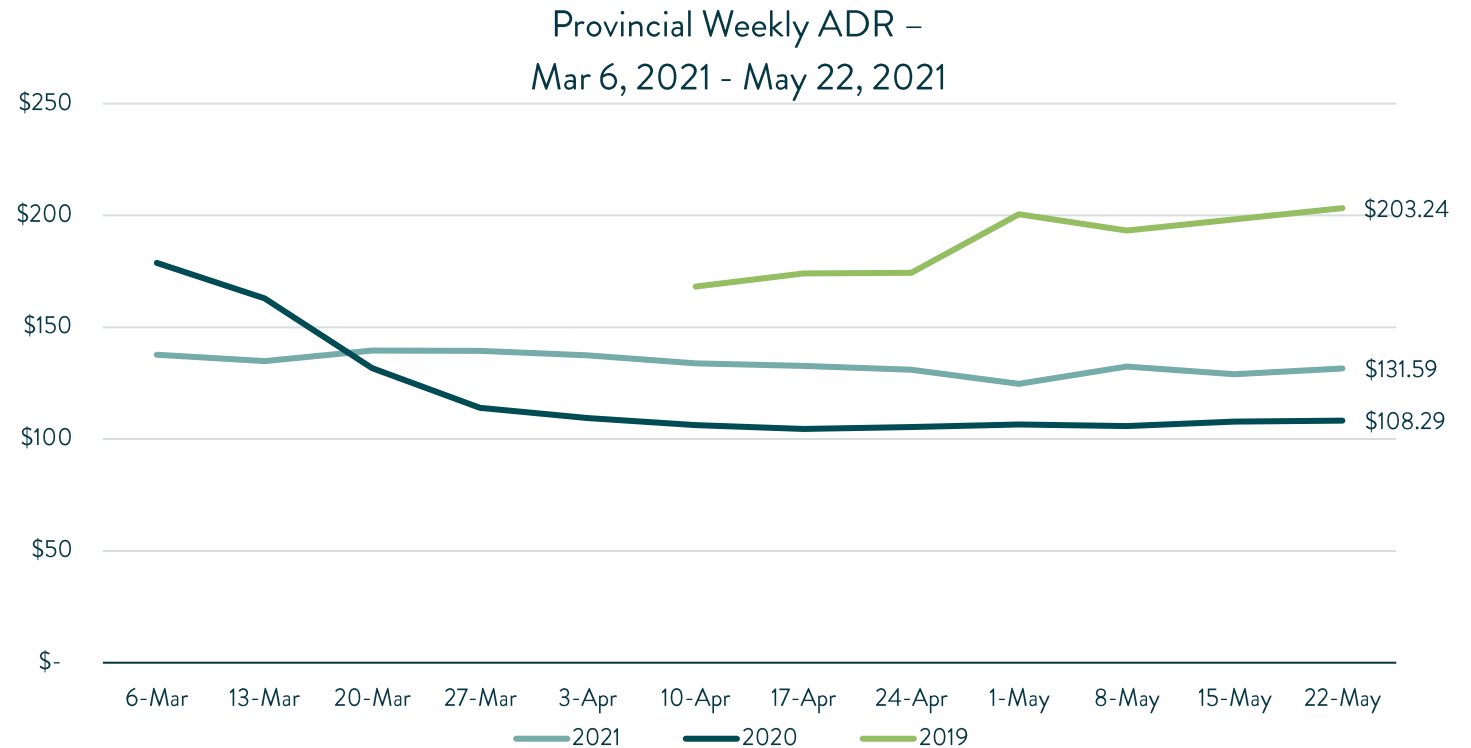
British Columbia's Hotel Occupancy Rate Week-over-Week

	May 16 - 22, 2021 Occupancy Rate	Week-over-Week May 16 - 22, 2021 vs. May 9 - 15, 2021 Occupancy Point Change	2021 vs. 2020 May 16 - 22, 2021 vs. May 17 - 23, 2020 Occupancy Point Change	2021 vs. 2019 May 16 - 22, 2021 vs. May 19 - 25, 2019 Occupancy Point Change
British Columbia	33.1%	+2.5	+11.4	-40.0
Vancouver (City of)	21.0%	+2.3	+11.5	-64.7
Whistler	5.2%	+1.5	-1.7	-47.8
Victoria	25.8%	+8.6	+9.0	-46.6
Kelowna	29.7%	+1.6	+12.5	-43.2
Kamloops	49.1%	-0.8	+20.4	-32.3
Richmond	52.4%	+4.5	+20.3	-27.7
Revelstoke	20.9%	-1.4	+4.0	-30.4



BC's average daily rate (\$131.59) up +2.1% from the previous week

- STR, an agency which reports BC's hotel performance, shows BC's average daily rate (ADR) was \$131.59 for the week of May 16 – May 22, 2021. This represents an increase of +2.1% from the previous week.
- It also represents an increase of +21.5% compared to a similar period in 2020 and a decrease of -35.3% compared to 2019.



*Please note data for 2019 is only available starting for the week April 7 - 13, 2019

British Columbia's Hotel Average Daily Rate (ADR) Week-over-Week

	May 16 - 22, 2021 ADR	Week-over-Week May 16 - 22, 2021 vs. May 9 - 15, 2021 ADR Percent Change	2021 vs. 2020 May 16 - 22, 2021 vs. May 17 - 23, 2020 ADR Percent Change	2021 vs. 2019 May 16 - 22, 2021 vs. May 19 - 25, 2019 ADR Percent Change
British Columbia	\$131.59	+2.1%	+21.5%	-35.3%
Vancouver (City of)	\$176.76	+2.5%	+47.3%	-38.8%
Whistler	\$209.20	+30.8%	+49.5%	+4.7%
Victoria	\$119.67	-10.3%	+22.9%	-45.3%
Kelowna	\$121.57	+7.1%	+14.3%	-27.2%
Kamloops	\$95.88	+0.2%	+6.8%	-25.3%
Richmond	\$168.90	-3.1%	+23.6%	-13.3%
Revelstoke	\$96.50	-0.6%	+9.5%	-15.3%



BC's revenue per available room (RevPAR) (\$43.51) up +10.4% from the previous week

- STR, an agency which reports BC's hotel performance, shows BC's revenue per available room (RevPAR) was \$43.51 for the week of May 16 – May 22, 2021. This represents an increase of +10.4% from the previous week.
- BC's RevPAR showed an increase (+85.8%) for the week of May 16 – May 22, 2021 compared to a similar period in 2020 and a decrease (-70.7%) for 2019.
- RevPAR substantially increased for all reported cities compared to a similar period in 2020 but remain below 2019 levels. The lower RevPAR seen in Whistler is beginning to rise quickly indicating that the encouragement of the provincial health and general solicitor officials to only travel to Whistler for essential travel is likely tailing off.

	May 16 - 22, 2021	Week-over-Week
	RevPAR	May 16 - 22, 2021 vs. May 9 - 15, 2021 RevPAR Percent Change
British Columbia	\$43.51	+10.4%
Vancouver (City of)	\$37.17	+15.2%
Whistler	\$10.95	+83.8%
Victoria	\$30.84	+34.3%
Kelowna	\$36.05	+13.1%
Kamloops	\$47.07	-1.5%
Richmond	\$88.46	+6.0%
Revelstoke	\$20.16	-6.9%



Source: [2021 STR, STR Global Ltd - STR May 16 – May 22, 2021](#)

CBRE forecasts that RevPAR across Canada in 2021 will see a +16% increase compared to 2020

- The CBRE 2021 Market Outlook forecast that RevPAR across Canada in 2021 is expected to increase +16% compared to 2020. This outlook is based on several key assumptions including Canada reaching its vaccination targets and the Canada-US border re-opening in Q4 2021.
- Occupancy across Canada's national accommodation market is forecast to grow to 38% in 2021, an increase of +5 points over 2020 levels. Hotel occupancy across Canada is projected to see even more significant growth in 2022 with an increase of +13 points to 51%.
- Read the full report here: [2021 Market Outlook](#)

National Historic Results

	Occ	ADR	RevPAR	Supply	Demand	Occ	ADR	RevPAR
2019	65%	\$163	\$106	1.4%	1%	-0.4 pts	5%	5%
2020*	33%	\$129	\$43	0.8%	-48%	-32 pts	-21%	-59%

National Outlook

	Occ	ADR	RevPAR	Supply	Demand	Occ	ADR	RevPAR
2021	38%	\$131	\$50	1.1%	16%	5 pts	1%	16%
2022	51%	\$136	\$70	1.5%	36%	13 pts	4%	39%
2023	59%	\$145	\$85	1.8%	16%	7 pts	7%	22%
2024	62%	\$157	\$98	0.6%	7%	4 pts	8%	15%
2025	65%	\$163	\$106	0.7%	5%	3 pts	4%	8%

* 2020 performance has been annualized to reflect total inventory

CBRE HOTELS CANADA

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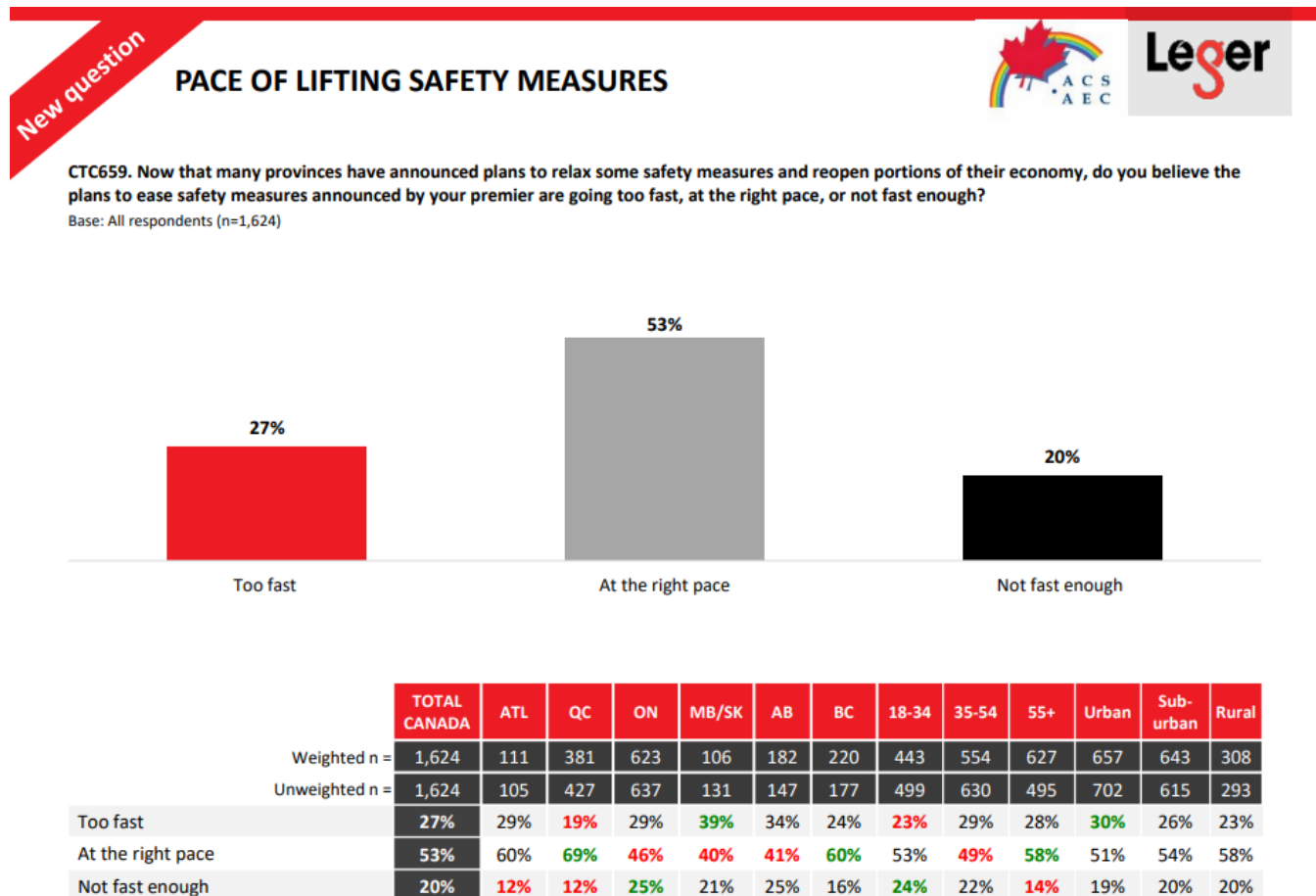
CBRE



Source: [CBRE Hotels Canada Industry Outlook - May 2021](#)

Leger reveals 53% of Canadians think safety measures are being relaxed at the right pace

- A new Leger survey has revealed that a majority (53%) of Canadians think that safety measures are being eased at the right pace. 27% of Canadians think that safety measures are being relaxed too quickly, whereas 20% say they are not being relaxed fast enough.
- The same survey showed that amongst BC Residents, 60% feel that safety measures are being eased at the right pace. This data was collected between May 21 and May 23, a few days before BC's Restart Plan was launched on May 25.
- More information can be found in the survey here: [Leger's North American Tracker](#)



Ipsos reveals that most Canadians support vaccine passports for a variety of indoor and outdoor activities

- The latest research from Ipsos reveals that most Canadians support the idea of requiring proof of vaccination before they are permitted to engage in certain activities regardless of whether the activity is indoors or outdoors. This includes 74% in favour of a vaccine passport for visiting a senior's facility, 72% for flying on an airplane, and 71% for travelling internationally.
- Canadians who have already received their first dose of the vaccine are much more likely to support vaccine passports being required for various activities when compared to those who have not yet received the vaccine.

Support for Vaccine Passports to Do Activities

Activity	% Support (Strongly/Somewhat)	% Oppose (Strongly/Somewhat)
Visiting a senior's facility	74% (45%/30%)	26% (12%/13%)
Flying on an airplane	72% (49%/23%)	28% (14%/14%)
Traveling internationally	71% (50%/21%)	29% (16%/13%)
Attending an indoor concert, event, museum, arena, theatre, etc.	67% (37%/30%)	33% (16%/17%)
Attending a post-secondary institutions (like a college or university)	67% (32%/36%)	33% (14%/19%)
Attending an outdoor concert, event, stadium, etc.	66% (31%/34%)	34% (17%/18%)

Source: [Ipsos, May 22, 2021](#)

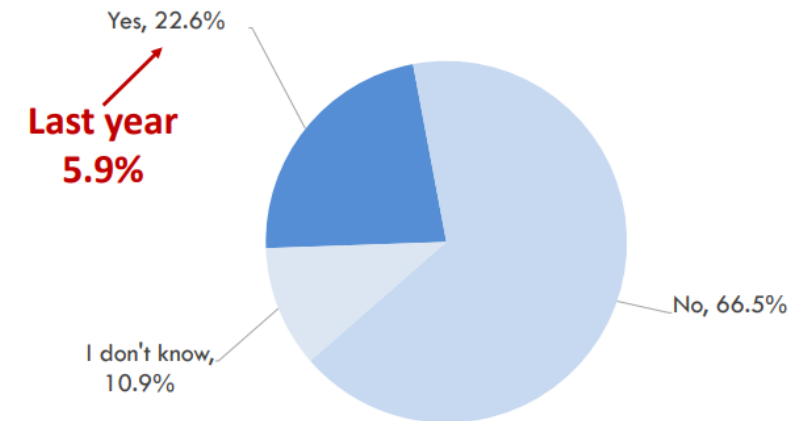


Destination Analysts reports that 22.6% of American travellers had travel plans for the Memorial Day holiday weekend

- The latest survey by Destination Analysts, a US-based tourism research company, reveals that 22.6% of Americans travellers had plans to travel over the Memorial Day holiday weekend compared to only 5.9% last year.
- 23.0% of Americans who reported they are travelling for Memorial Day planned on staying in a luxury or 5-star hotel, whereas 21.4% plan on staying in a full-service or 3-4 star hotel.
- View the full webinar here: [Update on COVID-19's Impact on American Travel](#)

MEMORIAL DAY WEEKEND TRAVEL

Question: Will you be traveling over the Memorial Day holiday (50 miles or more from your home) this year?



(Base: Wave 63 data. All respondents, 1,201 completed surveys. Data collected May 20-22, 2021)

Destination Analysts
ON YOUR RESEARCH

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Source: [Destination Analysts, COVID-19's Impact On American Travel, May 25, 2021](#)

Skift develops 'The 2021 Guide to Safer Meetings for Hotels and Venues'

- Skift has released a guide for hotels and venues to host safer meetings. The key recommendations include:
 1. Refocusing marketing efforts around communicating safety policies.
 1. Configuring event space to accommodate social distancing.
 2. Ensuring the right infrastructure is in place to embrace technology and hybrid events.
 3. Rethinking food and beverage options to include grab-and-go items or food vouchers, rather than buffet lines.
 4. Working with local DMOs or CVBs to rebuild group business in a safe manner.

Read the full guide here: [Safer Meetings: The Guide to Group Recovery for Hotels and Venues](#)



Source: [Skift, 2021 Guide to Safer Meetings for Hotels and Venues, May 25, 2021](#)

Downtown Vancouver issues 26 film permits between September 2020 and March 2021

- The Downtown Vancouver BIA reported that Vancouver's film industry recovered quickly after easing of COVID-19 restrictions. Around 40 productions were being filmed in Metro Vancouver prior to the lockdown. By October 2020 over 60 productions were either being filmed or in pre-production with an additional 26 downtown film permits being issued between September 2020 and March 2021.
- View the full report here: [State of Downtown 2020](#)



Source: [Downtown Vancouver BIA, State Of Downtown, 2020 Report](#)

Tourism and COVID-19 dashboard and reporting resources

- Destination BC's [Tourism Industry Dashboard](#) tracks statistics across tourism-related industries including accommodations, food and beverage, and transportation.
- Destination BC conducts and commissions 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 also 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.
- The Business Council of BC Dashboard allows users to [quickly understand the economic toll, recovery, and economic climate of BC](#).
- The [Ipsos Consolidated Economic Indicators](#) dashboard displays economic indicators across the globe including investment, employment, and GDP.
- Phocuswire has [restarted their COVID-19 liveblog](#), covering the pandemic's impact and recovery in the tourism industry.





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

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