

COVID-19 Research Roundup

June 29, 2020

Tatlayoko Lake, Cariboo Chilcotin Coast

BC has entered into 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.

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

- 62% of BC residents would welcome visitors into their community from nearby, a 19% increase since May 11 .
- Destination BC has launched a Signals and Sentiment dashboard to track geographic markets to help understand when travellers are ready to travel.
- Despite increasing concerns, fewer Americans say they would avoid all travel in the six-month period after COVID-19, at 7% compared to 25% from a month earlier.
- American business travel is down. 7% of frequent American business travellers vs. 18% of general business travellers won't feel comfortable flying without a coronavirus vaccine or treatment.
- Skift's 2020 travel megatrends are revisited through the lens of COVID-19.
- Three possible futures for tourism are described to provide a helpful framework for scenario planning.

Support for travel within BC by BC residents increases each week

- On June 23, 62% and 56% of BC residents indicated they would welcome visitors from communities nearby and from other parts of the province, respectively, into their community.
- This has grown from 43% and 35%, respectively since May 11.
- Support for travel within BC by residents of other parts of Canada has increased since May 11 (17% vs 31% June 23), however, sentiment did not change between June 16 and June 23, 31%.
- Relative to the sentiment shared by residents of other provinces, BC residents are more reserved to welcome visitors from across Canada into their community. 31% of BC residents vs. 58% of Quebec residents would welcome visitors from other parts of Canada.

British Columbia / Colombie-Britannique Trended / Tendence

% Somewhat / Strongly Agree	May 11 11 mai (n=201)	May 18 18 mai (n=202)	May 26 26 mai (n=200)	Jun 2 2 juin (n=210)	Jun 9 9 juin (n=203)	Jun 16 16 juin (n=209)	Jun 23 23 juin (n=205)
% Tout à fait d'accord / Plutôt d'accord							
From other communities near me / ... des visiteurs de collectivités voisines	43%	35%	41%	55%	57%	59%	62%
From other parts of my province / ... des visiteurs d'autres parties de ma province	35%	30%	35%	44%	46%	53%	56%
From other parts of Canada / ... des visiteurs d'autres régions du Canada	17%	12%	17%	21%	22%	31%	31%
From the United States / ... des visiteurs des États-Unis	9%	5%	9%	8%	7%	9%	6%
From other countries / ... des visiteurs d'autres pays que les États-Unis	7%	4%	9%	13%	6%	8%	8%

Green text indicates significantly higher than previous week @ 95% confidence
 Red text indicates significantly lower than previous week @ 95% confidence
 Base: British Columbia
 To what extent do you agree or disagree with each of the following statements?
 "I would welcome visitors travelling to my community..."

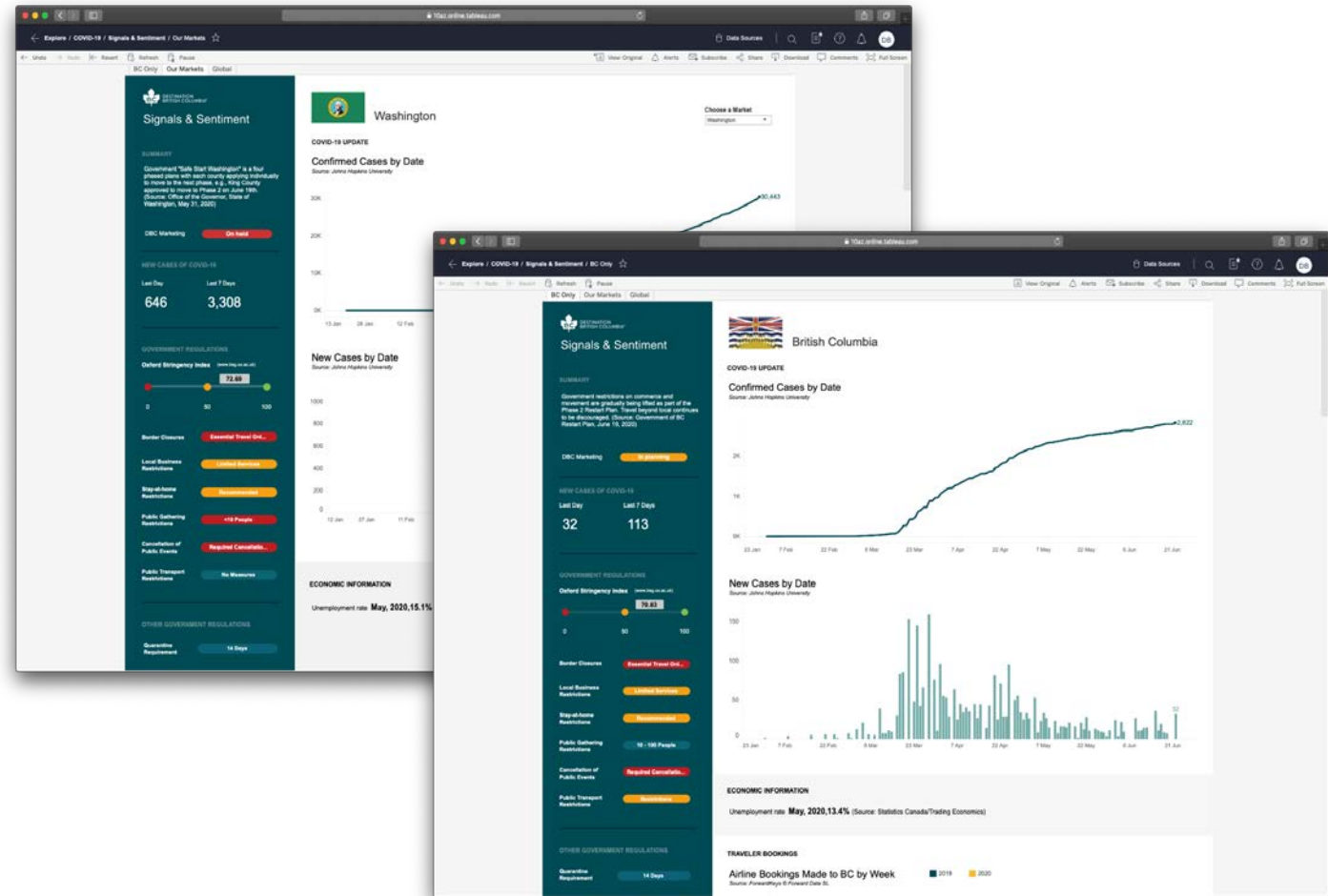
Le vert indique un résultat considérablement plus élevé que la semaine précédente (confiance à 95 %)
 Le rouge indique un résultat considérablement moins élevé que la semaine précédente (confiance à 95 %)
 Niveau de référence : Colombie-Britannique
 Dans quelle mesure êtes-vous d'accord avec chacun des énoncés suivants?
 « J'accueillerais volontiers dans ma collectivité... »

9



Signals and Sentiment dashboard available

- Destination BC has launched a new Signals and Sentiment dashboard designed to help make data-driven decisions over the coming months. The dashboard is a curation of available information that provides a snapshot of what's happening with BC's core geographic markets. Tracking and monitoring these data points is essential to help inform recovery and resilience marketing activities.
- The new dashboard is located on the Destination BC COVID-19 Hub, under [Destination BC Response Research & Insights](#) tab.



Source: [Destination BC](#)



Health and safety matters most

- Consumer priorities are now emphasizing health and safety; travellers will continue using hotels if safety can be assured.
- 48% of US travellers indicated they will wait until they are sure a hotel is safe and will stay as much as before the pandemic.
- Traveller's comfort staying in a hotel within their own country varies. For example, 36% of Canadians compared to 47% of Australians, 39% of Americans, 38% of Chinese, 26% of Japanese, 31% of British, and 30% of Mexicans.

What matters more to you now than before the Coronavirus crisis began?

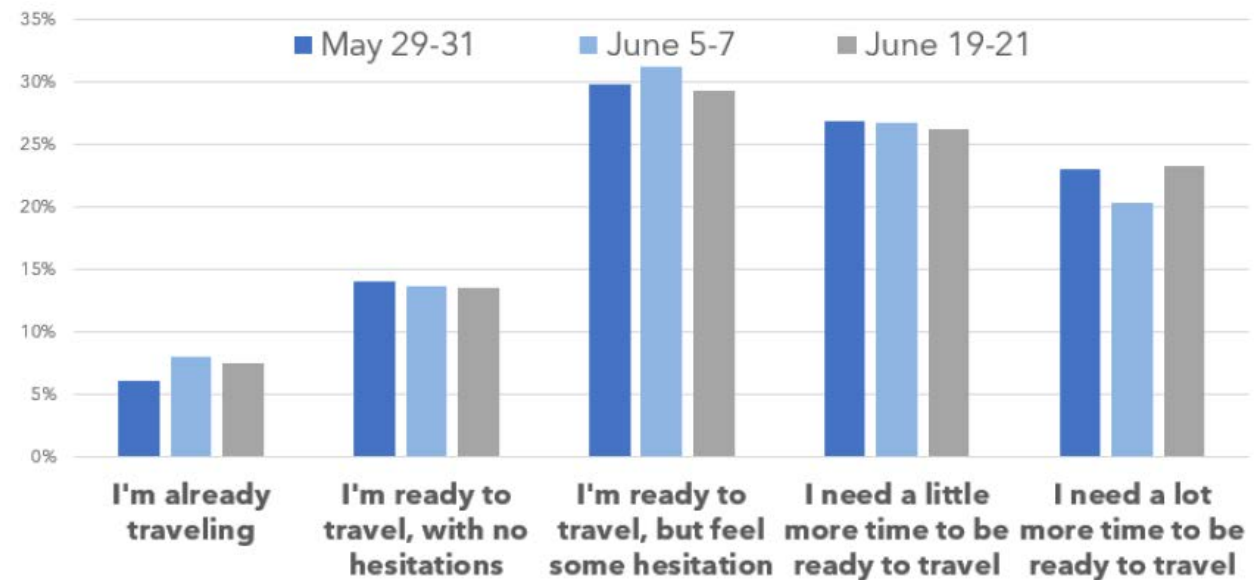


Thinking about when COVID-19-related closures and restrictions end, how will you proceed in using Hotels?



Despite concerns, fewer Americans state they will avoid travel post-COVID-19

- With cases rising in multiple areas throughout the USA, half of American travellers feel the coronavirus situation will get worse in the US in the next month, a significant increase since early June.
- However, fewer Americans say they would avoid all travel in the six-month period after COVID-19, at 7% compared to 25% from a month earlier.
- Major travel activities American travellers plan to avoid include cruises (60%), crowded destinations (57%), casinos (51%), and intercity bus travel (51%).



Coronavirus is changing business travel

- Frequent business travellers are less likely to travel for vacation than business, with 12% waiting for a vaccine or treatment.
- 7% of frequent American business travellers and 18% of business travellers won't feel comfortable flying without a coronavirus vaccine or treatment. 24% and 19% are comfortable flying for business now, respectively.
- Compared to before the pandemic:
 - 55% will travel less often for business
 - 51% think their company will reduce their travel budget
 - 58% will have fewer meetings that require travel
 - 65% will have more virtual meetings instead of travelling
 - 55% will attend fewer trade shows and conferences

Is the frequent flyer business up in the air?

Business travelers are uncomfortable flying now.



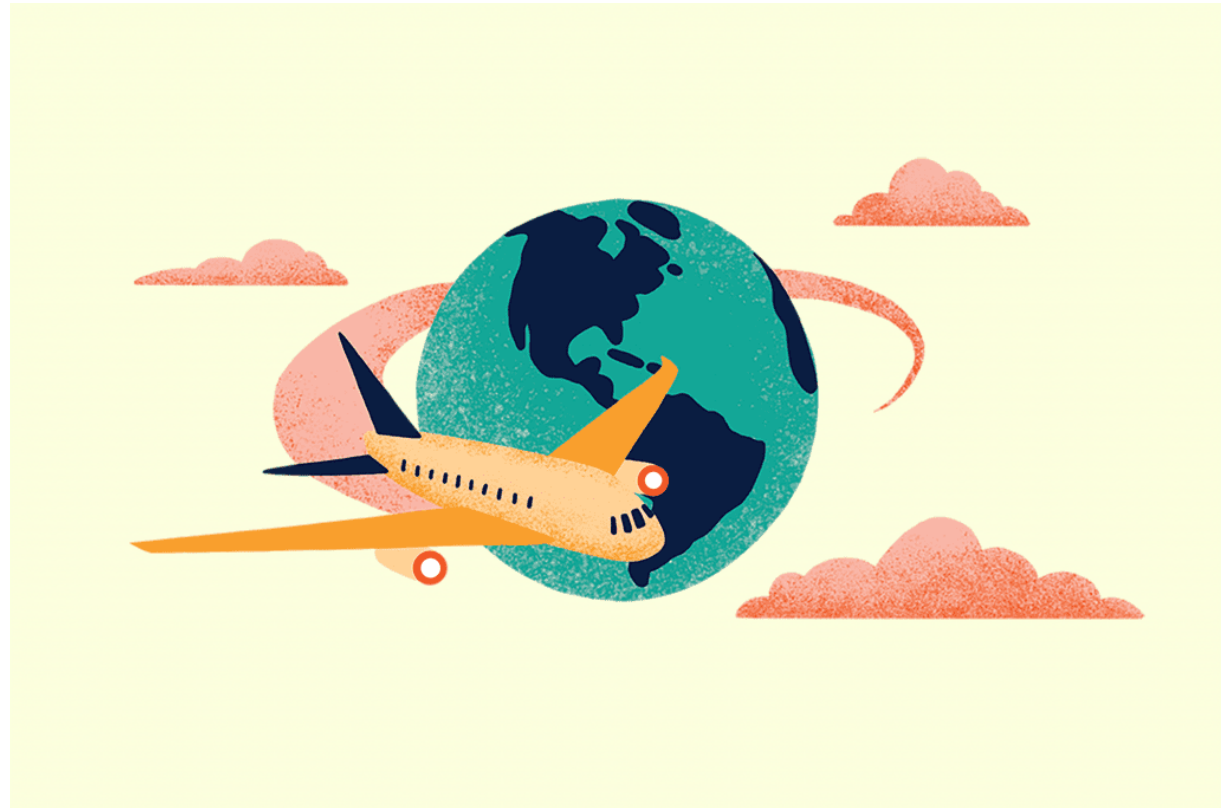
Source: [What the Future: Pandemic, Ipsos, June 24, 2020](#)



Skift updates 2020 Travel Megatrends through the lens of COVID-19

Skift has released a COVID-19 update on its 2020 Travel Megatrends:

- With more people working at home, long-term travel due to remote work culture may increase.
- Slow refund processes may lead to payment processing reform, including the new Open Payment Alliance.
- Virtual events have led to a boom in attendee-related data collection.
- Ultra-long-haul routes may be stalled for years or even decades, with airlines instead continuing to use hubs.

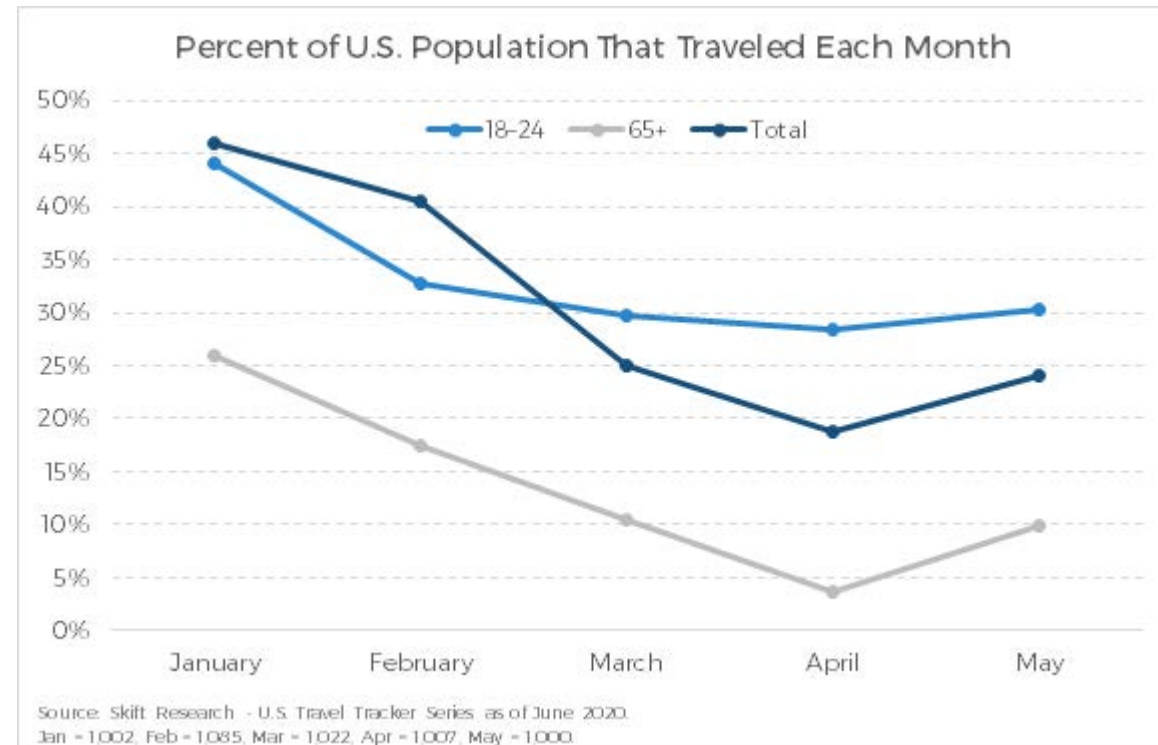


Source: [Rethinking Skift's 2020 Travel Megatrends in a Pandemic World, Skift, June 24, 2020](#)

Skift 2020 Travel Megatrends through the lens of COVID-19 (cont.)

Skift has released a COVID-19 update on its 2020 Travel Megatrends (cont.):

- Subscription travel is accelerating.
- A possible acceleration in destination management vs marketing.
- Smart Cities may be best situated to market towards 18- to 35-year-olds, one of the first groups expected to travel more.
- Many cities feel they need to improve their destination's liveability.
- Gen Z, expected to be a growing market for travel, is travelling more than boomers during the pandemic but may not be able to continue this trend.



Three possible futures of tourism for the thoughtful futurist created

- Ipsos created a set of master vignettes to explore possible scenarios of the future of tourism: one hopeful, one grim and one “Goldilocks” scenario, somewhere in between.
- These vignettes are not formal forecasts but serve as a narrative starting point for discussions and scenario planning.
- The Ipsos in-house futurists have deemed them “scary but plausible.”

Vignette One:
Fast intervention,
and smart investing

Vignette Two:
Uneven testing and
reopening; fall lockdown;
a slow road to recovery.

Vignette Three:
A depression; class
warfare; a complete
breakdown in
our institutions.

Source: [What the Future: Pandemic, Ipsos, June 24, 2020](#)





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