

COVID-19 Research Roundup

July 20, 2020

Mt. Assiniboine Provincial Park, Kootenay Rockies

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.





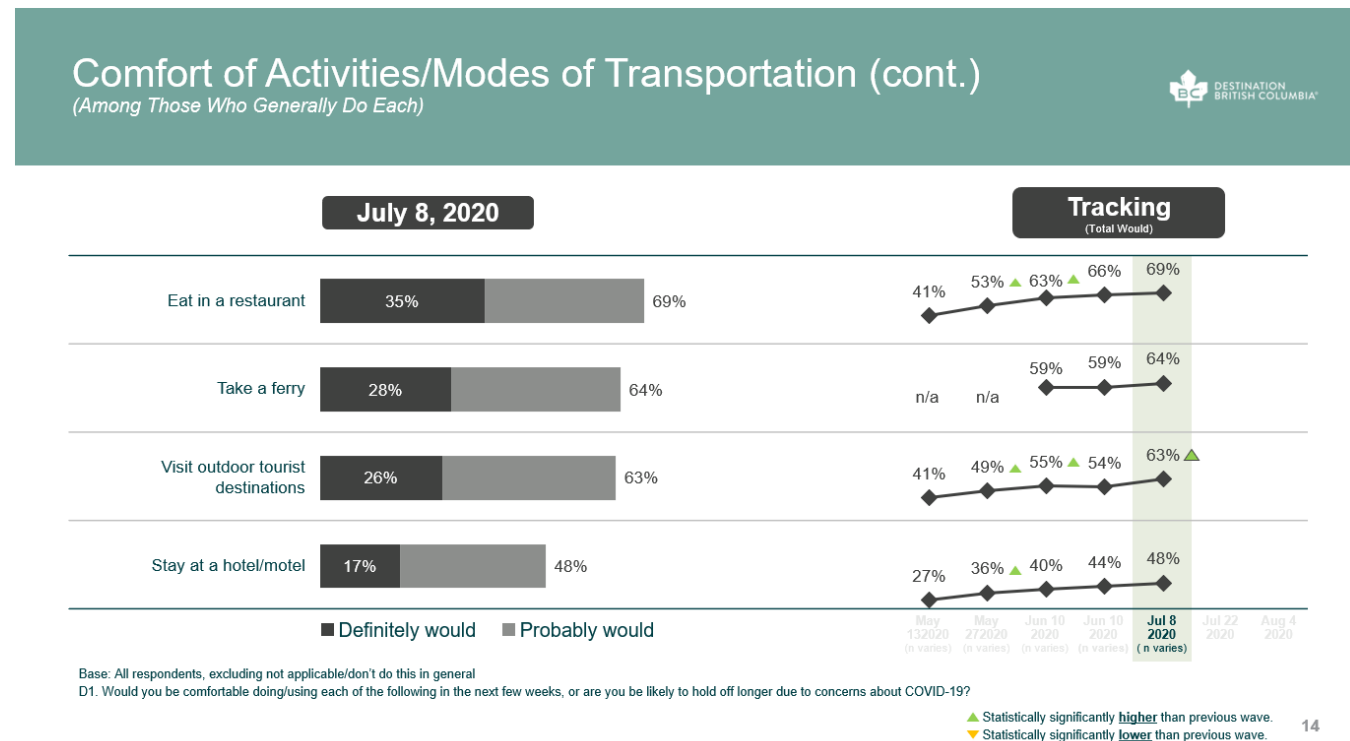
Destination BC is rounding up relevant research and articles each week related to the travel and tourism industry and COVID-19.

Last week in brief:

- BC residents increasingly willing to participate in tourism behaviours.
- BC residents no longer the most conservative in welcoming visitors into their own community.
- Domestic airline bookings to BC exceeded cancellations for the 5th week in a row.
- 0% of BC's accommodation/food services businesses have indicated COVID-19 having no impact; decreased volume of sales was the largest reported impact
- Americans are exhibiting signs of travel optimism for the next 12 months.
- January to April Provincial Tourism Indicators and International Visitor Arrivals are available.
- Year-to-date tourism export revenue for Canada's key markets are down from 2019.

BC residents increasingly willing to participate in tourism behaviours

- Through Wave 5 of Destination BC's BC Resident's Public Perceptions: COVID-19 Travel and Tourism Tracking Study, it was found that BC residents are more likely to participate in every tourism behaviour compared to the previous tracking wave. This includes visiting outdoor tourist destinations, increasing from 54% who would as of June 24 to 63%.
- Similarly, BC residents are more comfortable travelling for non-essential travel by car/RV, ferry, and cruise in the coming weeks compared to the previous wave of research.
- Travelling by airplane for non-essential travel declined slightly to 23% from 25% in the previous wave.
- Sentiment of BC residents intentions to travel and comfort of welcoming visitors into their community can be found in the full report, including insights by demographics and place of residence.



Source: [Destination BC's BC Resident's Public Perceptions: COVID-19 Travel and Tourism Wave 5, Insights West, July 13, 2020](#)

BC residents no longer the most conservative in welcoming visitors into their own community

- Destination Canada's weekly Resident Sentiment Wave 10 Report shows BC residents are no longer the most conservative in their levels of comfort welcoming visitors into their community.
- While BC residents are most likely to welcome fellow BC resident's from nearby communities (59%) compared to from other parts of BC (56%), other parts of Canada (35%), the US (7%), or other countries (8%), Ontario and Quebec residents are less likely to welcome residents by nearby communities (47% and 53%) and the rest of their province (41% and 46%).
- Sentiment of BC residents comfort of welcoming visitors into their community overall, by urban/rural comparison, and by provincial comparison can be found in the full

Comparison by Region / Comparaison par région

% Somewhat / Strongly Agree % Tout à fait d'accord / Plutôt d'accord	BC/C.-B. (n=205)	AB/Alb. (n=201)	SK/MB Sask./Man. (n=200)	ON/Ont. (n=607)	QC/Qc (n=414)	ATL (n=203)
From other communities near me / ... des visiteurs de collectivités voisines	59%	64%	59%	47%	53%	71%
From other parts of my province / ... des visiteurs d'autres parties de ma province	56%	58%	61%	41%	46%	68%
From other parts of Canada / ... des visiteurs d'autres régions du Canada	35%	45%	29%	35%	40%	29%
From the United States / ... des visiteurs des États-Unis	7%	17%	8%	7%	8%	2%
From other countries / ... des visiteurs d'autres pays que les États-Unis	8%	15%	9%	9%	10%	6%

Green text indicates significantly higher than at least one other region @ 95% confidence
 Red text indicates significantly lower than at least one other region @ 95% confidence
 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 qu'au moins une autre région (confiance à 95 %)
 Le rouge indique un résultat considérablement moins élevé qu'au moins une autre région (confiance à 95 %)
 Dans quelle mesure êtes-vous d'accord avec chacun des énoncés suivants?
 « J'accueillerais volontiers dans ma collectivité... »

Source: [Destination Canada's Resident Sentiment Wave 10, Leger, July 14, 2020](#)



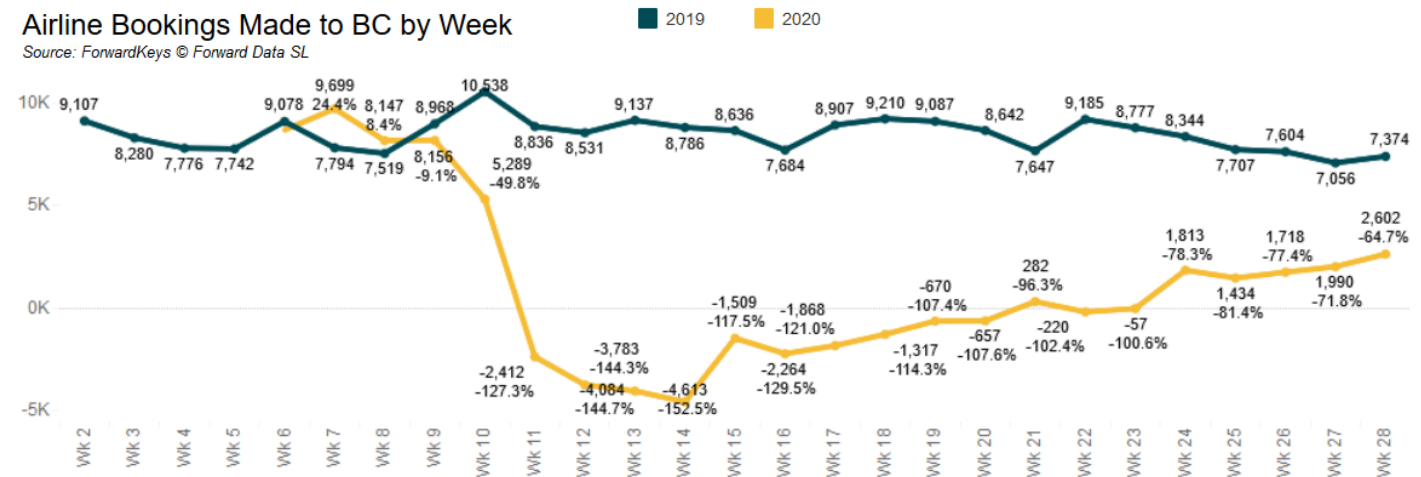
Airline bookings exceed cancellations for the 5th week in a row

- Within Destination BC's Signals & Sentiment dashboard, ForwardKeys shows there were 2,602 airlines bookings made to BC from the Canadian market in the week of July 7, 2020.
- While bookings to BC from the Canadian market are still down significantly over 2019, this represents the fifth week in a row where new bookings exceed cancellations.
- These insights from ForwardKeys 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.

TRAVELER BOOKINGS

Airline Bookings Made to BC by Week

Source: ForwardKeys © Forward Data SL



Source: [ForwardKeys © Forward Data SL, Signals & Sentiment Dashboard, Destination BC](#)

0% of BC's accommodation/food service businesses have indicated COVID-19 having no impact

- According to BC Chamber of Commerce's Pulse Check #4 Survey results, 89% of BC businesses within the accommodation and food service industry report decreased sales volume, which continues to be the most impactful negative effect of COVID-19. 0% of businesses reported COVID-19 having no impact on their business.
- 26% of businesses have increased their digital or e-commerce presence. Other positive impacts include introducing new products or services (16%), advanced new marketing projects (8%) and advancing new research and development (2%).

☒ 1) How COVID impacted biz - 1) To date, how has COVID-19 impacted your business? Select all that apply:

Accommodation and food services

id base: 1,401 • Updated: Jul 14, 2020

Decreased sales volumes



Increased operating costs



Introduced or increased online, digital or e-com...



Laid off employees



Reduced staff hours



Increased staff hours



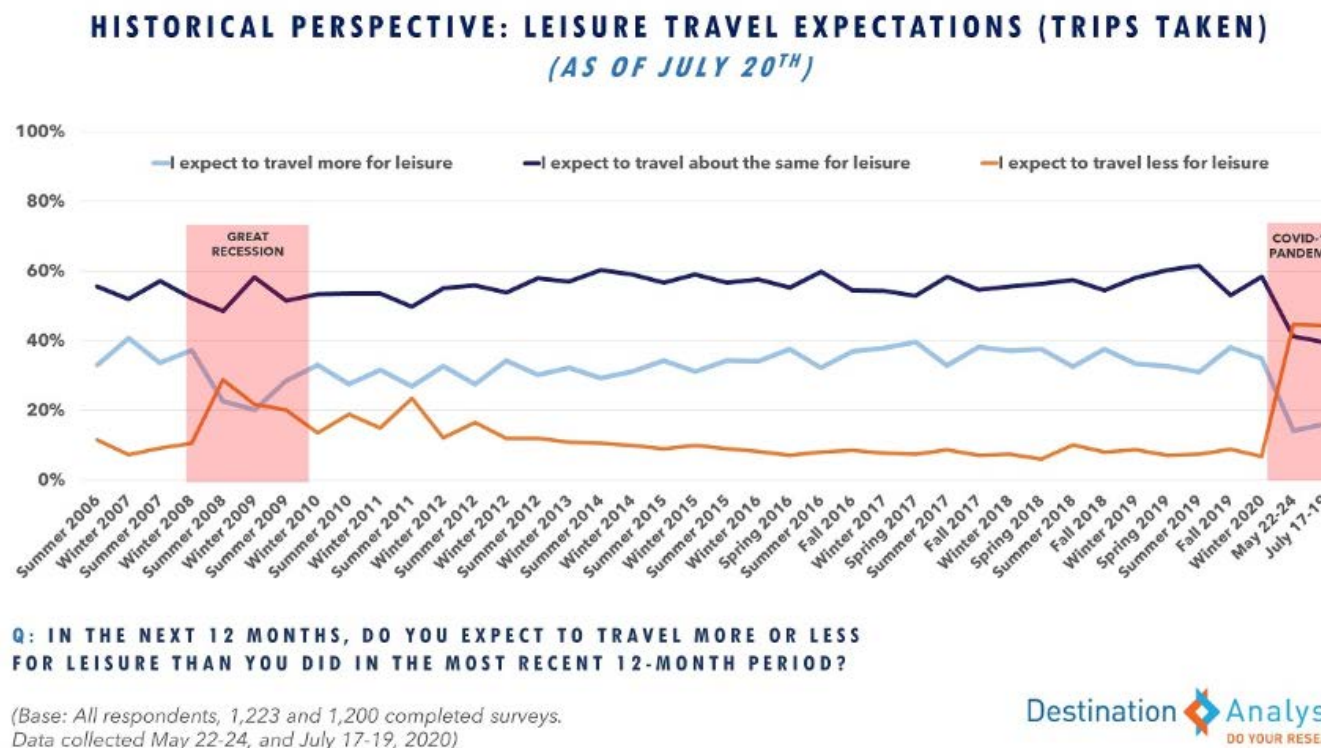
Closed temporarily



Source: [COVID Impact Pulse Check #4, BC Chamber of Commerce, July 16, 2020](#)

Americans are exhibiting signs of travel optimism for the next 12 months

- As of July 20, Destination Analysts reports that while Americans continue to feel down on near-term travel, they are exhibiting signs of optimism for the next 12 months overall (16% say they expect to take more leisure trips in the next year than they did in the previous year, compared to 14% in May).
- After falling to 27% in May from a record 71% in January, now 35% say they will prioritize leisure travel in their budget. Expected leisure travel budgets for the next year for American travellers are also up to \$2,721 from \$2,361 six weeks ago.



Source: [COVID-19 American Traveller Tracking Insights, Destination Analysts, July 19, 2020](#)

2020 quarter one (Jan-Apr) of Provincial Tourism Indicators available

- As data from the first few months of 2020 continues to be available, the impact of the pandemic becomes clear.
- Various provincial indicators for the tourism industry for January to April 2020 are published in Destination BC's [Provincial Tourism Indicators](#).
- BC restaurant receipts were down -25% year-to-date (Jan-Apr) in 2020. This was largely driven by the -64% decline already seen in April.
- Passenger volume to YVR was down -97% in April during the same period in 2019.
- BC Ferries passenger volume was down -77% in April from the same last year.



International Visitor Arrivals to BC for 2020 (Jan-Apr) down 44.3%

- Canada closed its borders to foreign nationals on March 18, 2020.
- The few arrivals recorded within BC during April were likely essential workers, travellers with dual citizenship/ permanent residency or other valid reasons as determined by the Canadian Border Services Agency.
- BC saw a 99% decrease in overnight international visitor arrivals (just 4,875 visitor arrivals in April).
- Year-to-date (Jan-Apr), BC experienced a 44% decrease of international visitor arrivals.
- Similar decreases are seen for Canada as a whole.



	April 2020				Year-to-Date			
	BC	% change*	Canada	% change*	BC	% change*	Canada	% change*
Total U.S.A.	13,448	-96.6%	51,042	-96.8%	814,465	-42.0%	3,144,813	-41.2%
U.S.A. Overnight	2,394	-99.0%	9,617	-98.9%	477,672	-43.7%	1,638,723	-43.8%
U.S.A. Same Day	11,054	-92.9%	41,425	-94.0%	336,793	-39.3%	1,506,090	-38.0%
Total Asia/Pacific	1,091	-98.7%	3,382	-98.0%	170,651	-45.2%	315,078	-46.4%
Japan	92	-99.0%	107	-99.4%	18,459	-52.3%	29,099	-52.8%
Taiwan	52	-98.9%	122	-98.2%	13,976	-38.8%	17,572	-41.8%
Hong Kong	185	-97.4%	204	-98.3%	16,562	-31.4%	25,837	-32.5%
Australia	42	-99.7%	86	-99.5%	36,305	-30.8%	48,220	-33.8%
South Korea	30	-99.5%	122	-99.3%	15,645	-40.4%	29,413	-47.9%
China	347	-98.3%	930	-97.8%	40,339	-53.2%	86,495	-51.8%
New Zealand	191	-92.1%	194	-94.6%	7,539	-18.6%	9,015	-28.4%
India	35	-99.7%	139	-99.5%	9,418	-62.4%	36,119	-51.4%
Total Europe	132	-99.6%	2,381	-98.8%	50,735	-47.9%	320,663	-43.7%
United Kingdom	69	-99.5%	526	-99.1%	21,635	-46.1%	84,557	-46.3%
Germany	21	-99.6%	402	-98.1%	7,741	-49.1%	33,865	-46.0%
Netherlands	5	-99.7%	543	-93.4%	2,164	-56.0%	13,937	-40.6%
Austria	1	-99.8%	27	-98.9%	839	-50.2%	4,392	-44.5%
Switzerland	5	-99.6%	72	-99.0%	1,796	-49.1%	11,570	-51.4%
France	8	-99.7%	195	-99.5%	3,157	-52.6%	82,851	-37.5%
Italy	3	-99.7%	37	-99.6%	1,473	-58.5%	10,054	-53.7%
Brazil	6	-99.8%	30	-99.7%	5,229	-49.2%	24,447	-50.0%
Mexico	1,196	-91.9%	5,818	-87.6%	28,602	-37.7%	79,744	-37.7%
Total International**								
(Includes USA Overnight)	4,875	-98.7%	26,229	-98.1%	741,048	-44.3%	2,484,840	-43.9%

*All percentage comparisons versus same period in 2019

** This publication includes overseas arrivals for all durations, including same-day and overnight. Due to Covid-19, Statistics Canada is not producing overnight arrivals data for countries other than the United States at this time. Destination BC normally publishes data for overnight visitors only.

For more information, please contact:

Destination British Columbia
Research and Analytics

Website:

www.destinationbc.ca/research.aspx

Source: Statistics Canada; prepared by Destination British Columbia, Research and Analytics.

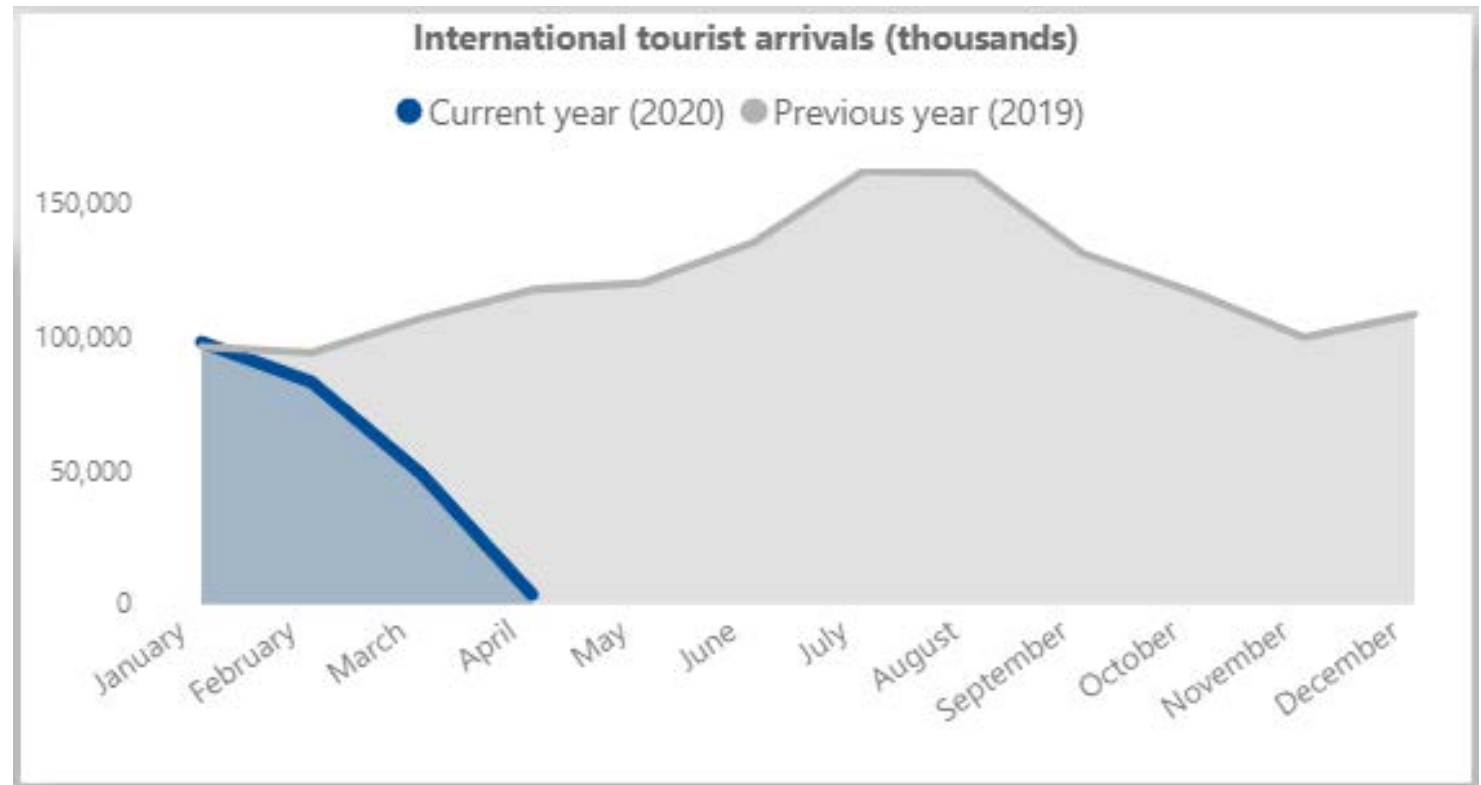
Note: Customs entries include international visitors who cross Canada Customs in British Columbia. These figures do not account for all visitors to BC, as domestic visitors are excluded as well as international visitors who cross Canada Customs outside BC, yet still travel to BC. Likewise, customs entries include visitors that cross Canada Customs in BC, but who continue on to other provinces.

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United Nations World Tourism Organization calls for “responsible restart of the sector”

- Globally, April saw 3.6 million international tourism arrivals, down 97% year-over-year.
- Year-to-date (Jan-Apr), globally there were 190 million international tourism arrivals, down 44% from the same period in 2019.
- The UNWTO has announced the potential impact of COVID-19 on tourism in 2020 to be 850 million to 1.1 billion fewer international tourist arrivals, US\$ 910 billion to US\$ 1.2 trillion lost in export revenues from tourism, and 100 to 120 million direct tourism jobs at risk.



Source: [UNWTO](#)



Canada's Tourism Export Revenue down from 2019

COVID-19 Impact and Recovery Report: International Summary

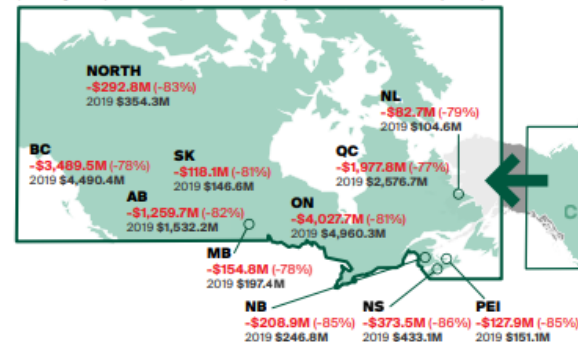
Updated: July 7, 2020



This document provides a summary of the situation across Destination Canada's international markets. For further details, please refer to the Impact and Recovery Report documents available for each individual market.

www.destinationcanada.com/en/coronavirus-updates/covid-19-research

Estimated Change in Tourism Export Revenue from January to September Compared to 2019 by Province (\$M)⁴
(% change compared to 2019) 2019 Tourism Export Revenue from January to September



LEGEND:

Recovery signal assessment¹

Overseas markets:

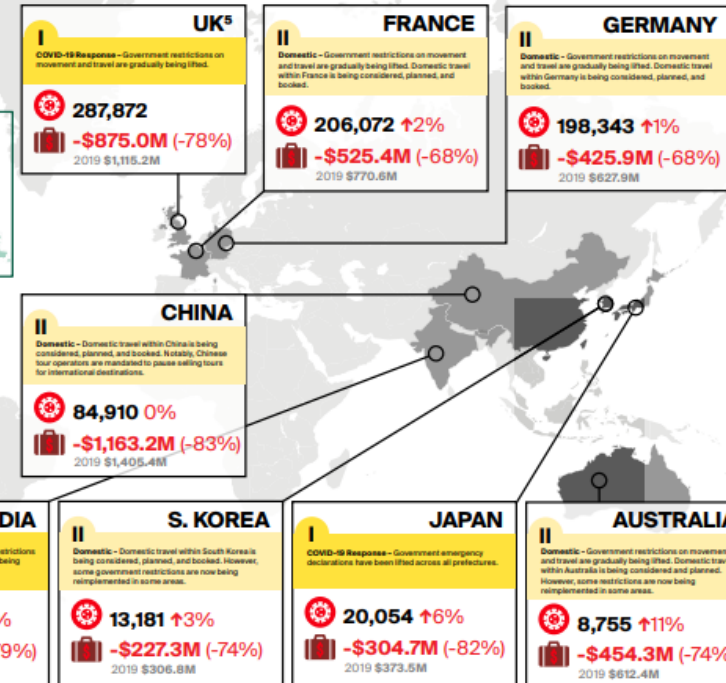
I COVID-19 Response II Domestic III Tentative International IV Regularized International

US market:

I COVID-19 Response II Intra-State III Inter-State IV Tentative International V Regularized International

Total confirmed COVID-19 cases as of July 7² % increase compared to previous week³

Estimated change in Tourism Export Revenue from January to September compared to 2019 (\$M) (% change compared to 2019)⁴
2019 Tourism Export Revenue from January to September



¹ For additional information on methodology and a description of the recovery signals, please see [Methodological Notes](#).

² Johns Hopkins Coronavirus Resource Center, July 7, 2020 5pm PST

³ European CDC, July 7, 2020

⁴ Destination Canada Estimates as of July 5, 2020

⁵ According to the European CDC, on July 3, 2020, the UK announced an ongoing revision of historical data that may lead to changes in the number of cases previously reported. As such, no percentage increase is available for the UK compared to the previous week.





DESTINATION
BRITISH COLUMBIA®

Research & Analytics
TourismResearch@DestinationBC.ca