



DESTINATION  
BRITISH COLUMBIA®

# COVID-19 Research Roundup

August 17, 2020



Boya Lake, Northern BC

## *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 August 14, 2020, Canadian and US officials agreed to keep the border between the two countries closed to non-essential travel until September 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.

This week we are highlighting some positive news during the continued challenges tourism faces:

- BC residents' intentions to travel remain similar to weeks prior
- BC residents are net positive for advertising their community to other BC visitors
- Canadian residents likely to consider BC as travel destination
- Travellers are most anxious about overall exposure to other guests
- Movement within BC has declined from previous week
- In BC, more time spent in parks, less time on retail and recreation
- BC's hotel occupancy continues to grow as reported by STR
- Airline bookings to BC increase
- Global air passenger traffic estimated to drop up to 70% in 2020
- Adventure travellers expect to resume travel before overall US market
- Examples of tourism resiliency



## BC residents' travel intentions remain unchanged since July 22

- BC residents' intentions to travel haven't changed since Wave 6, July 22. Intentions to take day trips in the next 4 weeks remain the highest at 59%, followed by overnight trips to other parts of the province at 33%.
- BC residents remain uninterested in travelling to the US or other countries without a vaccine or treatment.
- 43% of BC residents are concerned with welcoming visitors from nearby communities, up from 37% in Wave 6, while 56% are concerned with welcoming visitors from other parts of the province, up from 52%.

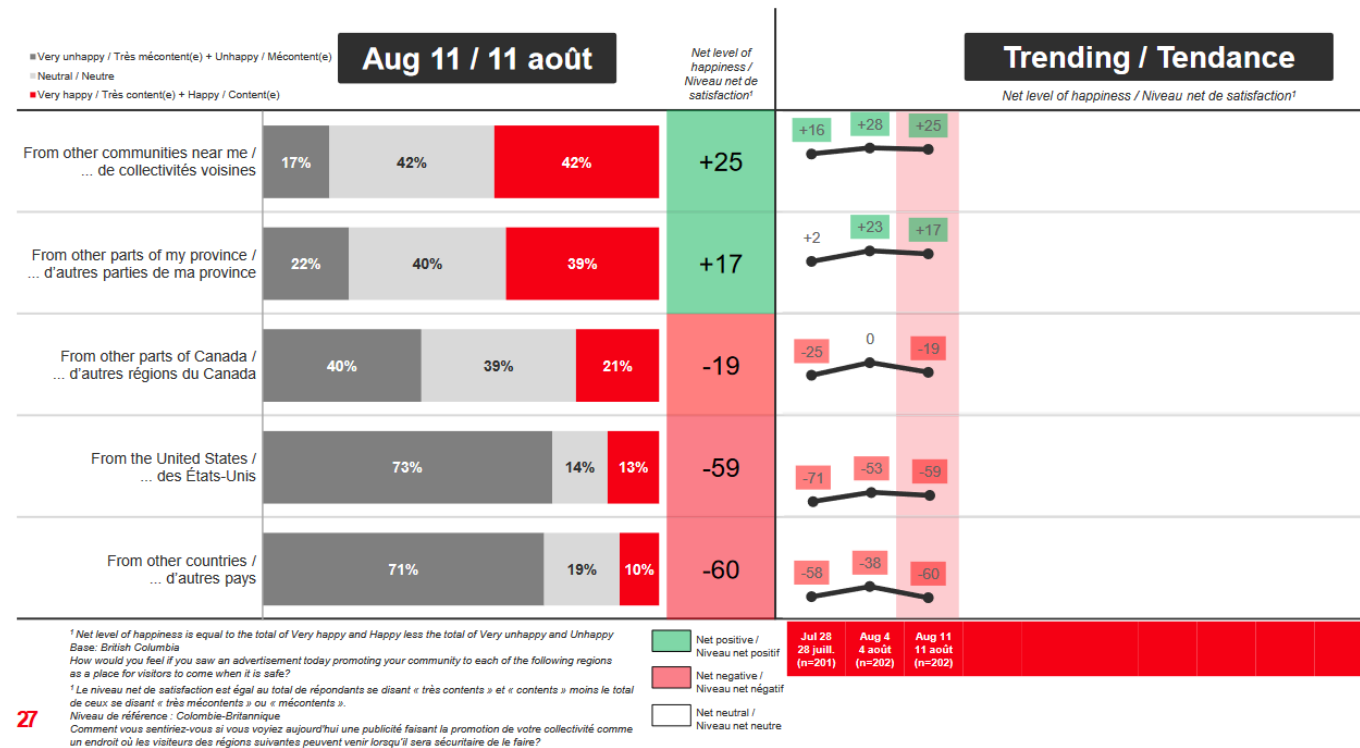


Source: [Destination BC's BC Resident's Public Perceptions: COVID-19 Travel and Tourism Wave 7, Insights West, August 10, 2020](#)

# BC residents are net positive for advertising their community to other BC visitors

- Destination Canada's Weekly Resident Sentiment Wave 14 report shows BC residents' receptivity of their community being advertised to other BC visitors has increased since July 28.
- Receptivity of advertising towards Canadian, US and International visitors has continued to remain net negative.
- Sentiment of BC residents' comfort of welcoming visitors into their community overall, by urban/rural comparison, and by province, can be found in the full report.

## British Columbia / Colombie-Britannique



Source: [Destination Canada's Weekly Resident Sentiment, Wave 14, Leger, August 11 2020](#)

# Canadian residents likely to consider BC as travel destination

- According to Destination Canada's Global Tourism Watch COVID Special Survey Wave 2 (July), 48% of Canadian residents (not including BC residents) would consider a taking a trip to BC in the next year. This is followed by 41% of residents considering a trip to Ontario (not including Ontario residents), and 32% of residents considering taking a trip to Alberta (not including Alberta residents).
- BC residents (when choosing the top two) claimed the most important conditions impacting their travel interest were strict cleaning protocols (47%), physical distancing (40%), and staff masks (36%), however, the impact of having these conditions and others in place have decreased since Wave 1 (June) of this survey.
- The full report, covering Canadian travel intentions, domestic resident characteristics and COVID-related topics, will be posted online shortly, along with future Waves as they complete. In the meantime, please email Destination BC's Research & Analytics team at [TourismResearch@DestinationBC.ca](mailto:TourismResearch@DestinationBC.ca) for more insights.

Wave 2 – July 2020

## Aided Consideration (Next Year) – by City/Region

	W1	W2	W3
British Columbia	47%	48%	
Vancouver	43%	42%	
Victoria	27%	28%	
Kootenay Rockies	19%	19%	
Whistler	15%	17%	▲
Thompson Okanagan	15%	16%	
Alberta	31%	32%	
Banff & Lake Louise	30%	32%	
Calgary	26%	27%	
Edmonton	19%	19%	
Alberta Rockies	17%	18%	
Jasper	16%	17%	
Saskatchewan	7%	9%	▲
Regina	11%	12%	
Saskatoon	11%	12%	

	W1	W2	W3
Manitoba	8%	9%	
Winnipeg	16%	18%	▲
Churchill	5%	5%	
Ontario	43%	41%	
Toronto	32%	29%	▼
Niagara Falls	27%	29%	
Ottawa	20%	21%	
Muskoka	8%	7%	
Northern Ontario	7%	7%	
Quebec	30%	30%	
Montréal	33%	32%	
Québec City	27%	26%	
Mont Tremblant	9%	11%	▲
New Brunswick	18%	18%	
Saint John	17%	18%	
Fredericton	14%	16%	▲

	W1	W2	W3
Nova Scotia	26%	25%	
Halifax	27%	29%	▲
Cape Breton	19%	20%	
Prince Edward Island	21%	22%	
Charlottetown	28%	30%	▲
Newfoundland & Labrador	16%	15%	
St. John's	23%	24%	
Yukon	6%	7%	
Whitehorse	12%	13%	
Dawson City	7%	9%	▲
Northwest Territories	4%	4%	
Yellowknife	12%	13%	
Inuvik	4%	4%	
Nunavut	2%	2%	
Iqaluit	11%	11%	

▲ / ▼ Significantly higher / lower than previous wave.

Base: Out-of-province pleasure travellers (past 3 years), excluding residents from each province (Wave 2-3492-4417)

12 BVC1a\_OP and BVC1b\_OP. You may have already mentioned this before, but which destinations would you seriously consider visiting in the next year? (Select all that apply)

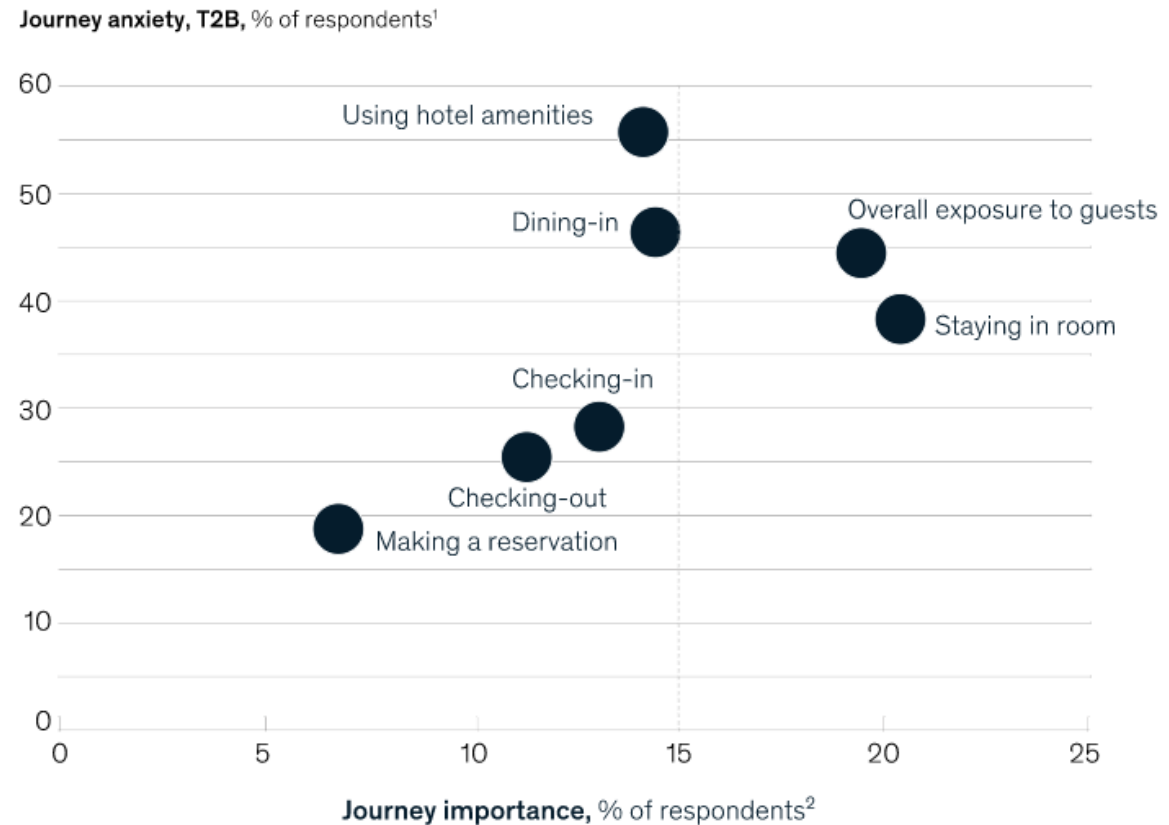
Destination BC



Source: 2020 Global Tourism Watch COVID Special Survey Wave 2, Destination Canada, July 2020

## *Travellers are most anxious about overall exposure to other guests*

- McKinsey & Company reports that, weighted for importance to the journey, travellers are most anxious about staying in rooms and their overall exposure to other guests. Making a reservation was the least anxious part of their experience.
- When it comes to flights, travellers are most anxious about their overall exposure to other guests and boarding their flight. They were least anxious about getting to the airport.
- McKinsey states that COVID-19 is accelerating the evolution of traveller needs, including:
  - More analytics and disruptive tech
  - A shift to digital and mobile
  - Environmental impact considerations
  - Expanded well-being service offerings
  - Fundamental shifts in food and beverage

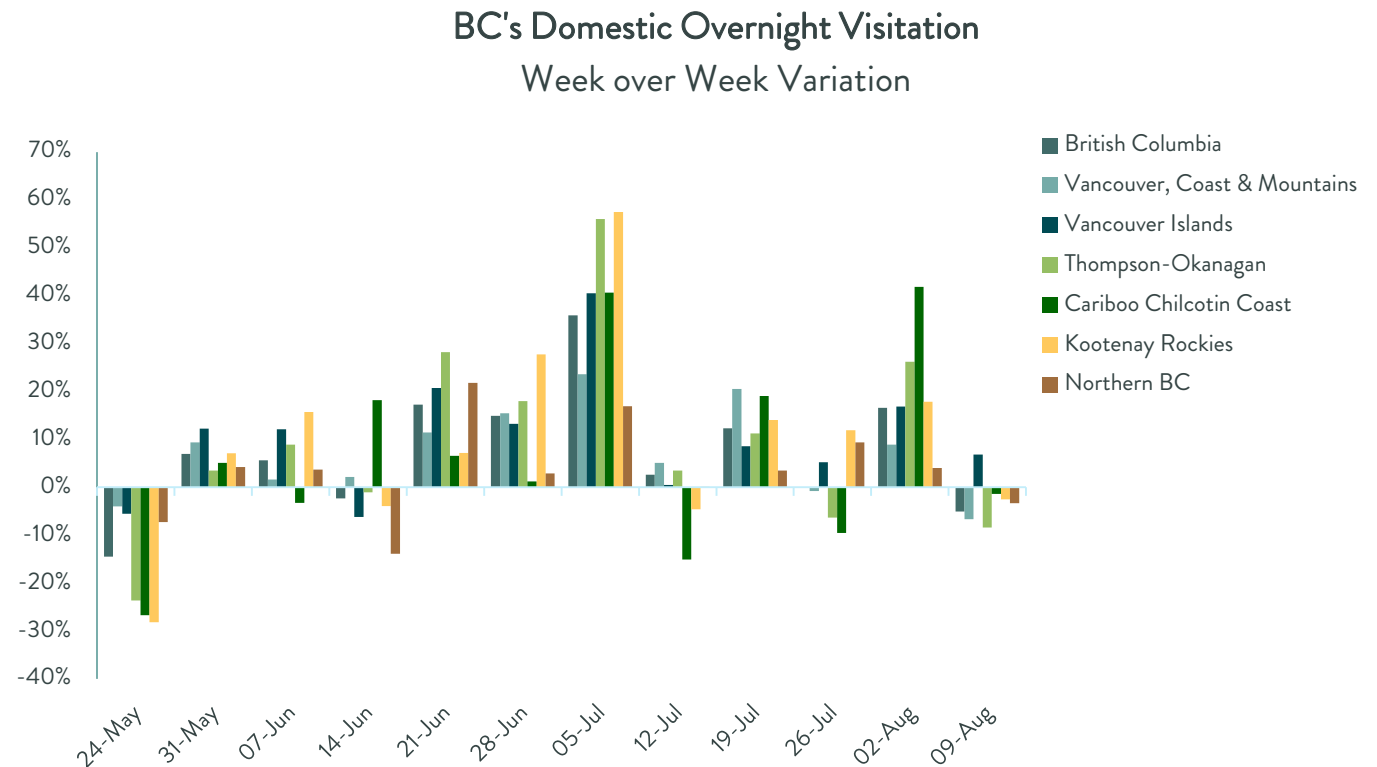


Source: [McKinsey & Company, June 15, 2020](#)



## *Movement within BC has declined from previous week*

- Movement within BC has declined from the week ending August 9, compared to the previous week.
- According to Environics Analytics Weekly COVID Tracker Report, a decline in domestic overnight visitation within BC was seen (-5.1%). Decreases in visitation were seen throughout the province – for example, Thompson-Okanagan (-8.4%), Vancouver, Coast & Mountains (-6.7%), Northern BC (-3.3%), Kootenay Rockies (-2.5%), and Cariboo Chilcotin Coast (-1.4%).
- Vancouver Island saw an increase of domestic overnight visitation (+6.8%) from the previous week.



Source: [Environics Analytics Weekly COVID Tracker Report, August 9, 2020](#)





## *In BC, more time spent in parks, less time on retail and recreation*

- According to Google mobility data, movement in parks is up 184% compared to a baseline of the first five weeks of the year. However, this is down from 191% on August 4.
- Less movement is seen in retail and recreation areas, down -12% on August 9 and in transit stations, down -23%, of which none are significant changes since August 4.

### Movement in British Columbia

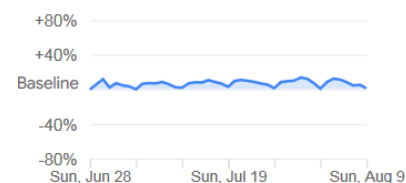
#### Retail & recreation

-12% compared to baseline



#### Grocery & pharmacy

+2% compared to baseline



#### Parks

+184% compared to baseline



#### Transit stations

-23% compared to baseline



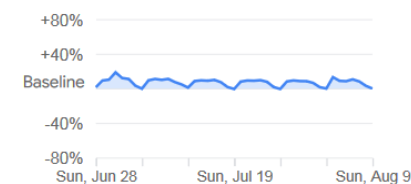
#### Workplaces

-15% compared to baseline



#### Residential

+0% compared to baseline

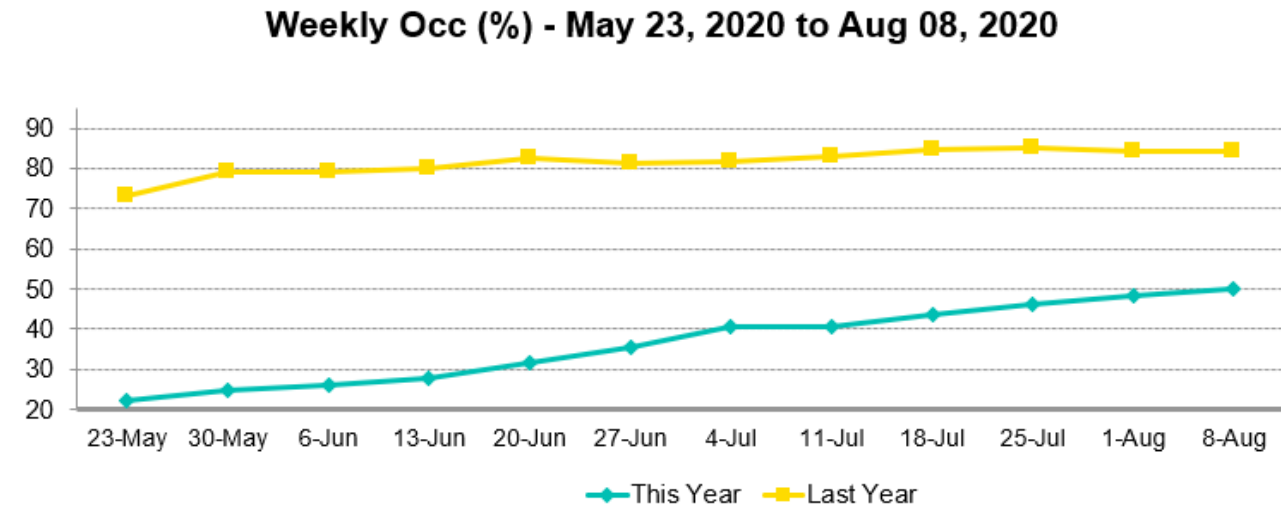


Source: [COVID-19 Community Mobility Report, Google, August 9, 2020](#)



## *BC's hotel occupancy continues to grow as reported by STR*

- STR, an agency which captures hotel occupancy and ADR, reports a continued, steady rise in BC hotel performance, week after week.
- BC's hotel occupancy for the week of Aug 2-8 was 50.2%. This represents a positive increase of 2.0 points from the previous week. BC was the only Canadian province to reach a 50% occupancy level.
- The average occupancy rate for the City of Vancouver was 27.4% (up 1.2 points from the previous week), Kelowna 82.3% (up 7.9 points), Kamloops 59.6% (down 0.4 points), Victoria 41.4% (up 1.5 points), Whistler 60.3% (up 3.9 points), and Richmond 40.3% (down 0.1 points).



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

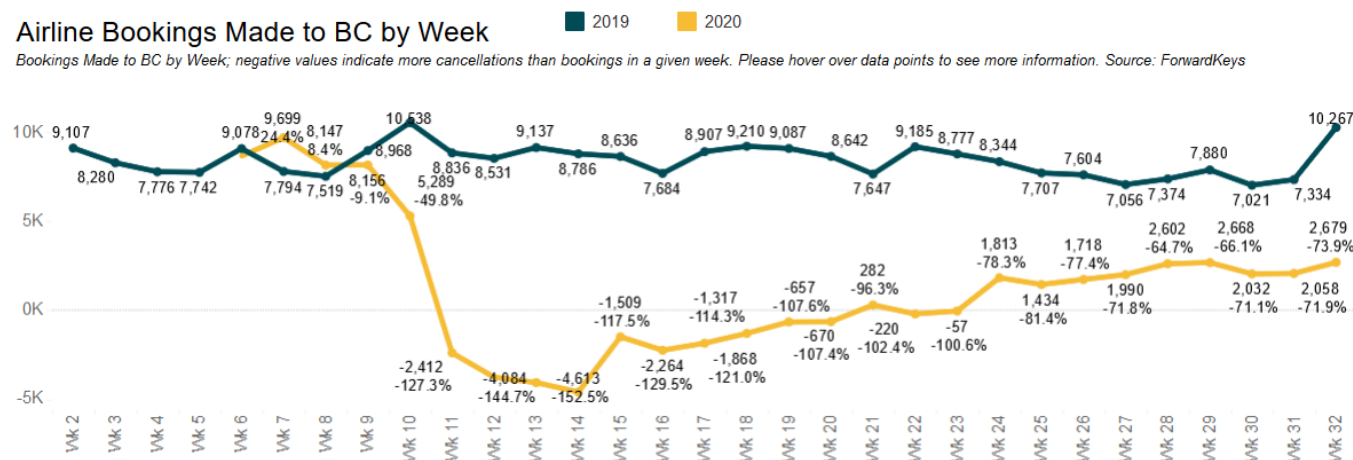
# Airline bookings to BC increase

- ForwardKeys, a flight analysis company, has shown in the week of August 3, 2020, there were 2,679 airline bookings made to BC. While this is a change of -73.9% compared to last year, it is the highest number of bookings since the pandemic began, and an uptick from the two weeks previous.
- 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

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



Source: [ForwardKeys, Signals & Sentiment Dashboard, Destination BC](#)



## *Global air passenger traffic estimated to drop up to 70% in 2020*

- S&P Global now expects global air passenger traffic to drop by 60-70% in 2020 compared with last year.
- S&P Global also reports that they expect a more gradual recovery than previously estimated, reaching pre-COVID levels by 2024.
- For more insights, visit [S&P Global website](#).

### **We Have Revised Downward Our Base-Case Assumptions For Global Passenger Air Traffic\***

Year	Current estimates versus 2019 actual	Previous estimate (as of May 28, 2020)§
2020	Negative 60%-70%	Negative 50%-55%
2021	Negative 30%-40%	Negative 25%-30%
2022	Negative 15%-20%	Negative 15%-20%
2023	Negative 10%-15%	Negative 5%-10%

\*Revenue passenger kilometers or revenue passenger miles (one paying passenger flown one kilometre or mile, an industry standard measure of traffic). §Source: "Airports Face A Long Haul To Recovery," published May 28, 2020, on RatingsDirect.



Source: [S&P Global, August 12, 2020](#)

## *Adventure travellers expect to resume travel before overall US market*

- A study by the Adventure Travel Trade Association has reported that Adventure travellers expect to resume near pre-COVID level travel spending in 2021, three years before the overall US travel market is expected to recover.
- In the next 6 to 12 months, out of those US adventure travellers likely to travel, 53% intend to travel abroad, including 8% to neighbouring countries and 45% for an international trip involving an airplane.



Source: [ATTA, U.S. Adventure Traveler Sentiment - June-July 2020 Report](#)



## Examples of tourism resiliency

With the tourism industry facing challenges worldwide, it is important to recognize signs and strategies as tourism businesses pivot and adapt on the road to recovery. These are just a few of the positive stories across BC.

- The British Columbia Regional Tourism Secretariat reported that 24% of businesses were experiencing business as usual in July, up 13% from June. 907 staff have been rehired by 203 businesses. [Source](#)
- After closing to all lodging, the historic Chilcotin Lodge successfully reopened as a car-hop: a drive-in burger bar. [Source](#)
- After reopening, WildPlay Element Parks created a Reseller Program, offering partners a commission for any tickets sold while taking the opportunity to cross-promote other tourism businesses. [Source](#)
- Tally-Ho Carriage Tours has been able to re-start operations, in part by the development of a partnership with three other local businesses to create the new Tally-Ho & Sea Cider Picnic Experience, a three-hour, horse-drawn carriage tour. [Source](#)
- More BC [Stories of Resilience](#) can be found on the BC Tourism Resiliency Network website.





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

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