



COVID-19 Research Roundup

September 7, 2020

Ferry to Quadra Island, Vancouver Island

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.

Last week in brief:

- BC resident sentiment towards visitors from all areas has remained stable
- Comfort levels around tourism activities continue to increase in BC
- Domestic overnight visitors down again across BC
- BC hotel occupancy rates slightly dip across BC for the week of August 23-29
- BCHA survey forecasts 32% average expected occupancy rate to end of 2020
- BC sees the most airline bookings since the start of the pandemic
- Americans are less averse to travel than in previous weeks
- Skift Health Score reports travel companies are down 70-90% revenues in Q2
- US virtual events market projected to reach more than \$400B by 2027
- Tourism and COVID-19 dashboard and reporting resources

BC resident sentiment towards visitors from all areas has remained stable

- Destination Canada's Weekly Resident Sentiment Wave 17 (September 1) report shows that the sentiment of BC residents welcoming visitors from all areas has remained stable, whereas a significant increase in positive sentiment was seen by residents of Alberta and Atlantic provinces toward welcoming fellow residents to visit their province.
- Similarly, BC resident sentiment towards promoting their community as a place to visit has remained stable towards all areas from August 25.
- 68% of BC rural residents and 57% of urban residents would welcome visitors from nearby communities, compared to 71% and 55%, respectively on August 25.

Comparison by Region

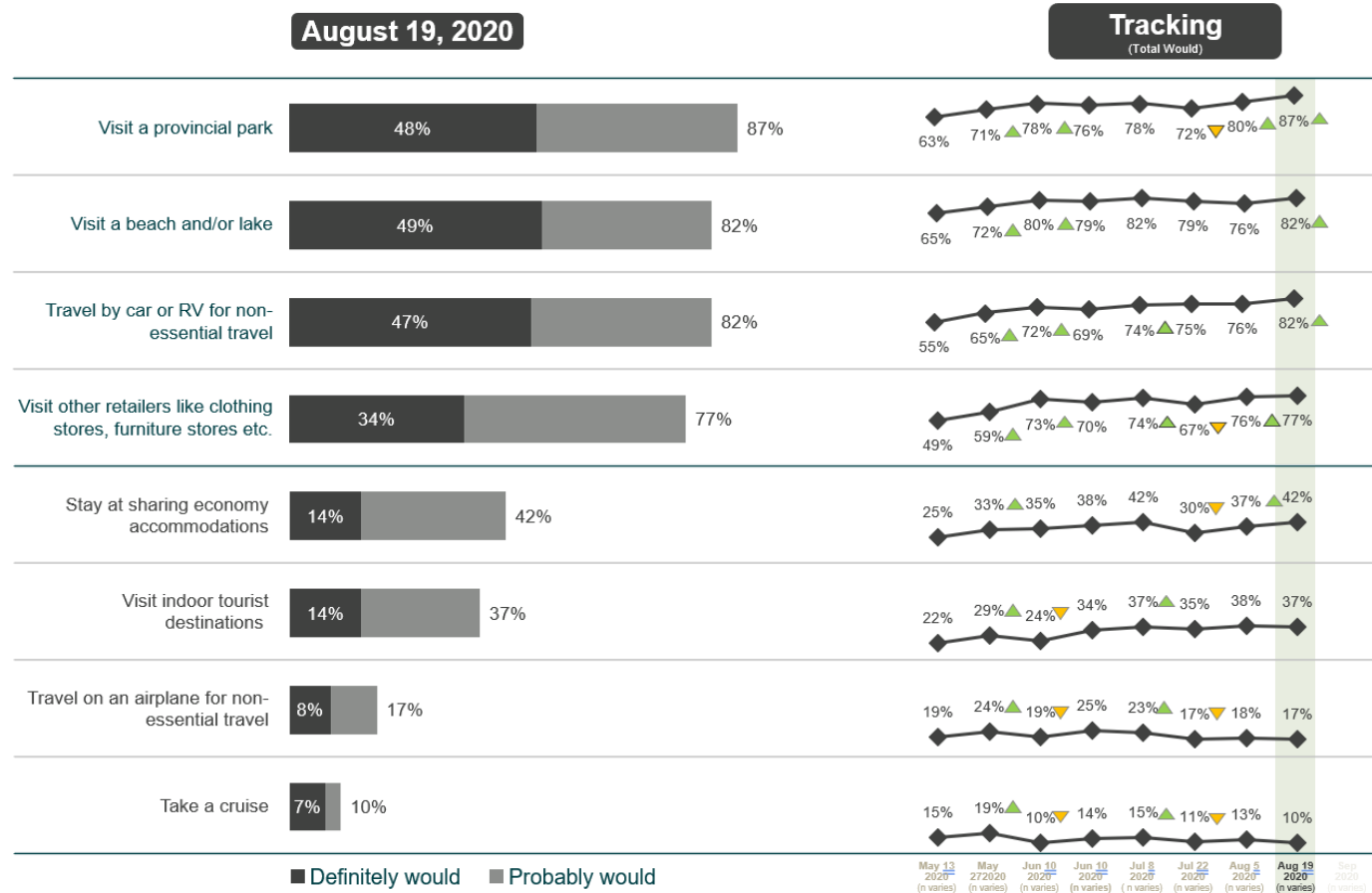
	BC/C.-B. (n=203)	AB/Alb. (n=200)	SK/MB Sask./Man. (n=202)	ON/Ont. (n=609)	QC/Qc (n=408)	ATL (n=200)
From other communities near me / ... de collectivités voisines	58%	69%	53%	53%	56%	81%
From other parts of my province / ... d'autres parties de ma province	52%	66%	47%	47%	59%	78%
From other parts of Canada / ... d'autres régions du Canada	35%	45%	20%	41%	49%	21%
From the United States / ... des États-Unis	8%	12%	9%	8%	11%	1%
From other countries / ... d'autres pays que les États-Unis	9%	15%	7%	12%	15%	2%

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..."



Comfort levels around tourism activities continue to increase in BC

- BC Residents Public Perceptions: COVID-19 Travel and Tourism Tracking Report shows that BC residents' comfort levels around various tourism-related activities continue to increase, with significant increases in likelihood to visit a provincial park (87% definitely or probably would) or visit a beach and/or a lake (82%) in the next few weeks.
- Compared to Wave 7, BC residents' intentions to travel in the next 4 weeks has increased from 59% to 65% for a day trip to surrounding areas and from 33% to 38% for an overnight trip in other parts of the province.

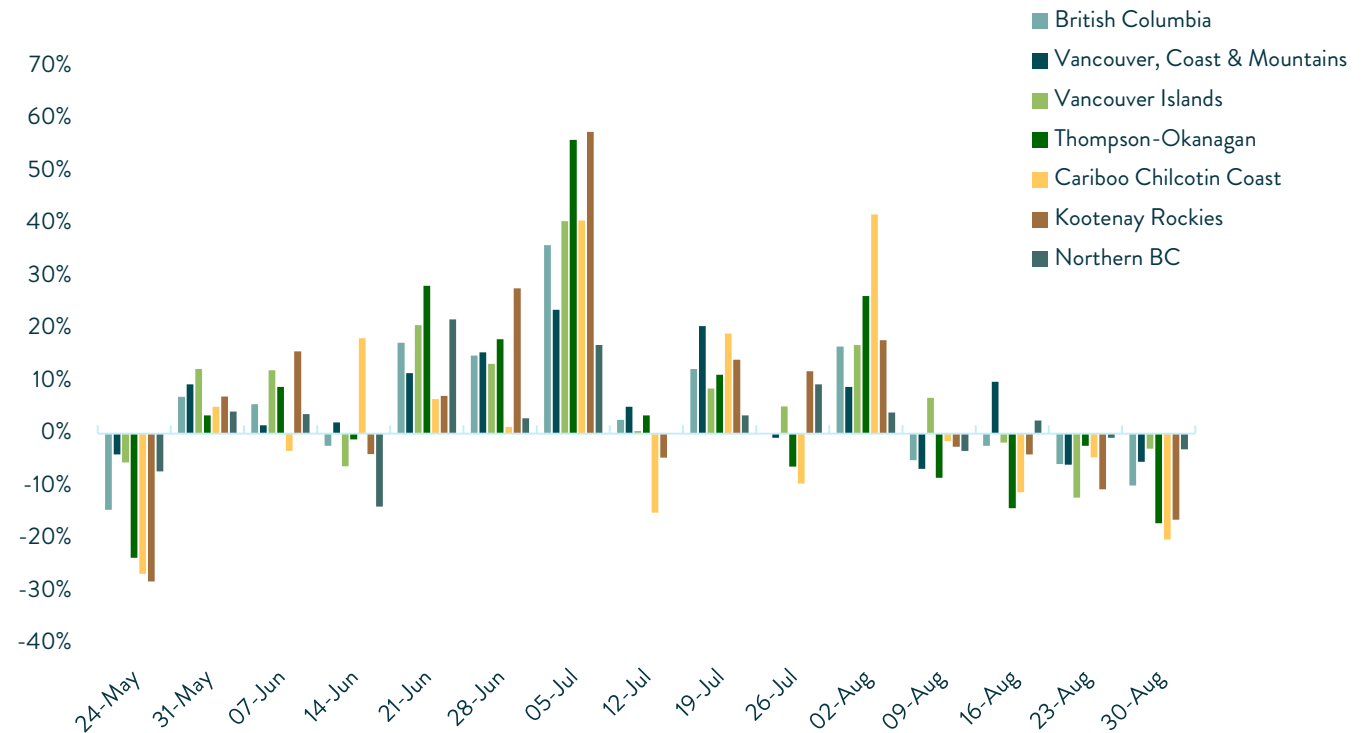


Source: [Destination BC's BC Residents Public Perceptions: COVID-19 Travel and Tourism Wave 8, Insights West, August 19, 2020](#)

Domestic overnight visitors down again across BC

- According to Environics Analytics Weekly COVID Tracker Report, a decline in domestic overnight visitation within BC was seen (-9.9%) during the week ending August 30, compared to the previous week, and down -40.7% from the same period last year.
- All areas around the province saw decreases in domestic overnight visitation during the week of August 24-30 (compared to the week prior):
 - Vancouver Island (-2.9%)
 - Kootenay Rockies (-16.4%)
 - Vancouver, Coast & Mountains (-5.4%)
 - Cariboo Chilcotin Coast (-20.2%)
 - Northern BC (-3.0%)
 - Thompson Okanagan (-17.1%)

BC's Domestic Overnight Visitation
Week over Week Variation



Source: [Environics Analytics Weekly COVID Tracker Report, August 30, 2020](#)



BC hotel occupancy rates slightly dip across BC for the week of August 23-29

- STR, an agency which captures BC hotel performance, shows BC's hotel occupancy for the week of August 23-29 was 53.5%. This represents a decrease of 0.2 points from the previous week and a decrease of -35.9 compared to the previous year (August 25-31, 2019).
- Of the six cities shown, the City of Vancouver has seen the largest year-over-year occupancy point decrease of -65.2%, followed by Richmond at -49.8.
- For the week of August 23-29, 2020, Whistler's ADR is \$225.82, down -1.4% from the previous week, and down just -6.0% from the same period last year.

August 23– August 29, 2020	Occupancy Rate	Week over Week: August 23-29, 2020 vs. August 16-22, 2020 Occupancy Point Change	Year over Year: August 23-29, 2020 vs. August 25-31, 2019 Occupancy Point Change	Average Daily Room Rate	Week over Week: August 23-29, 2020 vs. August 16-22, 2020 ADR Percent Change	Year over Year: August 23-29, 2020 vs. August 25-31, 2019 ADR Percent Change
BC	53.5%	-0.2	-35.9	\$154.01	-1.7%	-29.1%
Vancouver (City of)	31.9%	-0.5	-65.2	\$157.86	-1.2%	-46.0%
Whistler	61.4%	+2.0	-21.3	\$225.82	-1.4%	-6.0%
Victoria	58.3%	+7.7	-32.3	\$167.73	-7.6%	-32.2%
Kelowna	76.1%	-6.5	-16.1	\$188.71	-4.1%	-13.8%
Kamloops	62.7%	-0.6	-28.8	\$108.40	-1.7%	-17.6%
Richmond	43.9%	+0.7	-49.8	\$129.76	-0.3%	-37.0%



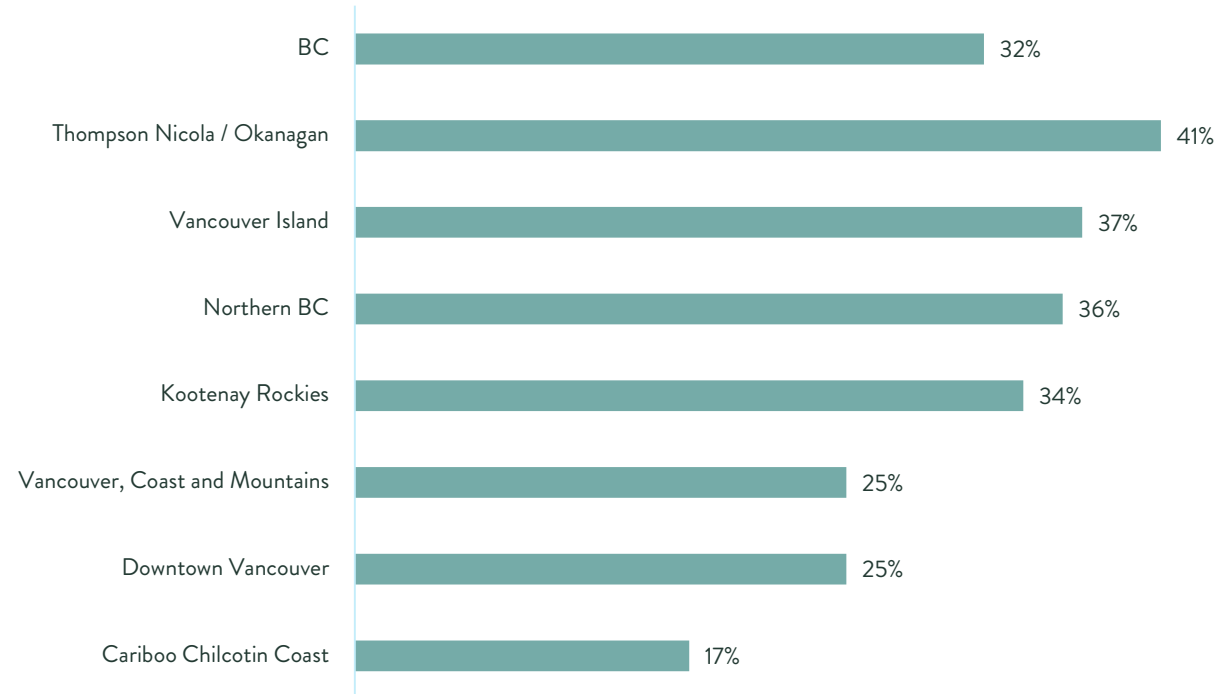
Source: [2020 STR, STR Global Ltd August 23-29, 2020](#)

BCHA survey forecasts 32% average expected occupancy rate to end of 2020

- The BC Hotel Association August Pulse Survey results show the forecasted average expected occupancy rate for BC from August to the end of 2020 is 32%. The Thompson Okanagan, Vancouver Island, Northern BC, and Kootenay Rockies regions are forecasted above the provincial average.
- The number of employees that are still laid off across BC is 30,858, including seasonal positions. 40% of hotels have recalled their teams, while 58% have not and will not be recalling their teams in 2020.
- Further findings can be found in TIABC's [presentation](#) and [video recording](#).

Average Expected Occupancy Rate to end of 2020 (Forecast)

Actuals January to July, Forecast August to December



Source: [State of the Hospitality & Tourism Industry, BC Hotel Association and TIABC, September 3, 2020](#)

BC sees the most airline bookings since the start of the pandemic

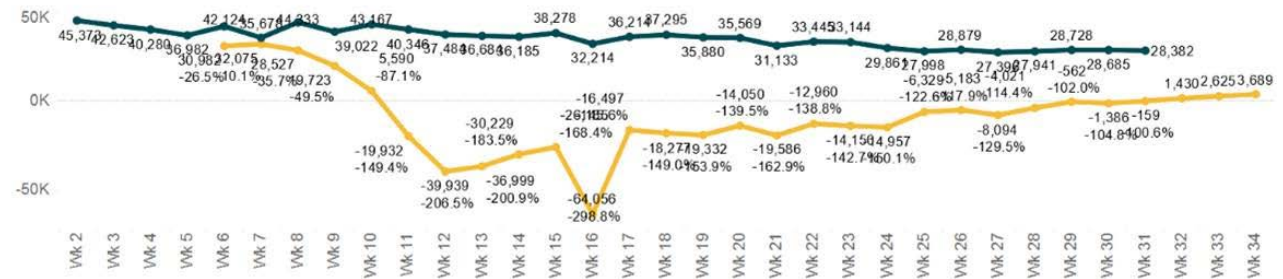
- ForwardKeys, a flight analysis company, has shown in the week of August 17, 2020, there were 3,689 airline bookings made to BC. While this is a significant decrease compared to last year, it is the highest number of bookings since the pandemic began.

- Arrivals to BC by month for April to August have seen a year-over-year difference of over -90% each month.

- 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.

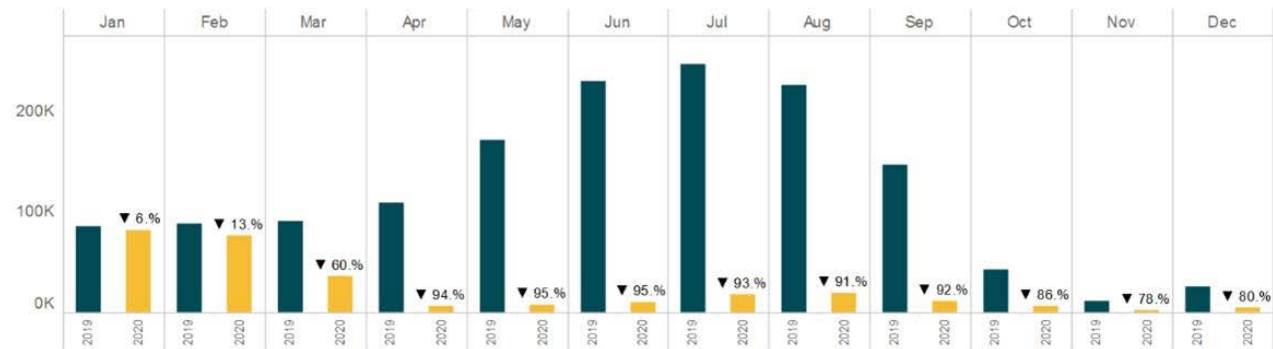
Airline Bookings Made to BC by Week

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



Arrivals to BC by Month

Arrivals by Month, based on current bookings, with Year-over-Year difference displayed as a percentage. Please note: comparison is made on bookings made during the same time period last year, and does not portray total arrivals to BC, especially in more distant time periods. Source: ForwardKeys



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

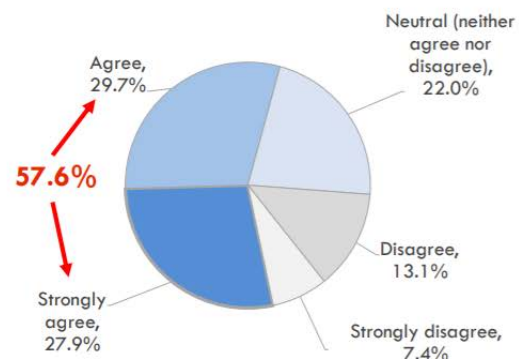


Americans are less averse to travel than in previous weeks

- Destination Analytics reports 57.6% of Americans are “planning to avoid all travel until the Coronavirus situation blows over”, down from 61.7% last week.
- 40.7% of Americans won’t travel without a vaccine, down from 43.6%.
- Travelling on a cruise line, attending large sporting events, and bus travel continue to be perceived as the most unsafe travel activities.
- 53% of Americans are excited to travel, up from 48.7% last week.

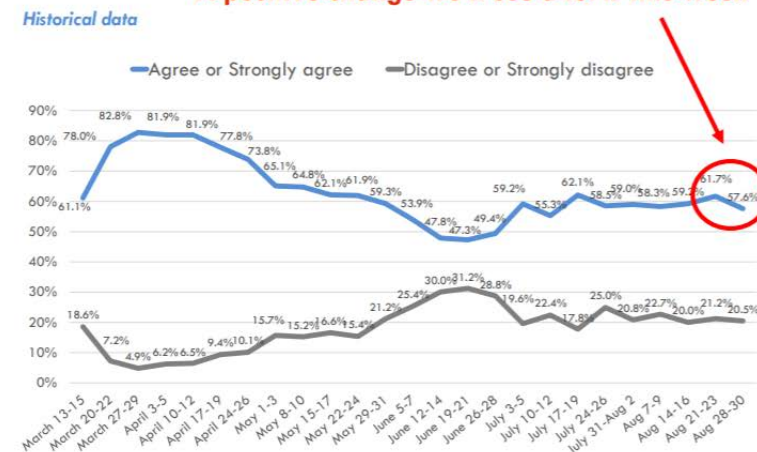
How much do you agree with the following statement?

Statement: I'm planning to avoid all travel until the Coronavirus situation blows over.



(Base: Waves 1-25. All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214, 1,214, 1,205, 1,231, 1,365, 1,213, 1,200, 1,206, 1,224, 1,201, 1,202, 1,207 and 1,250 completed surveys.)

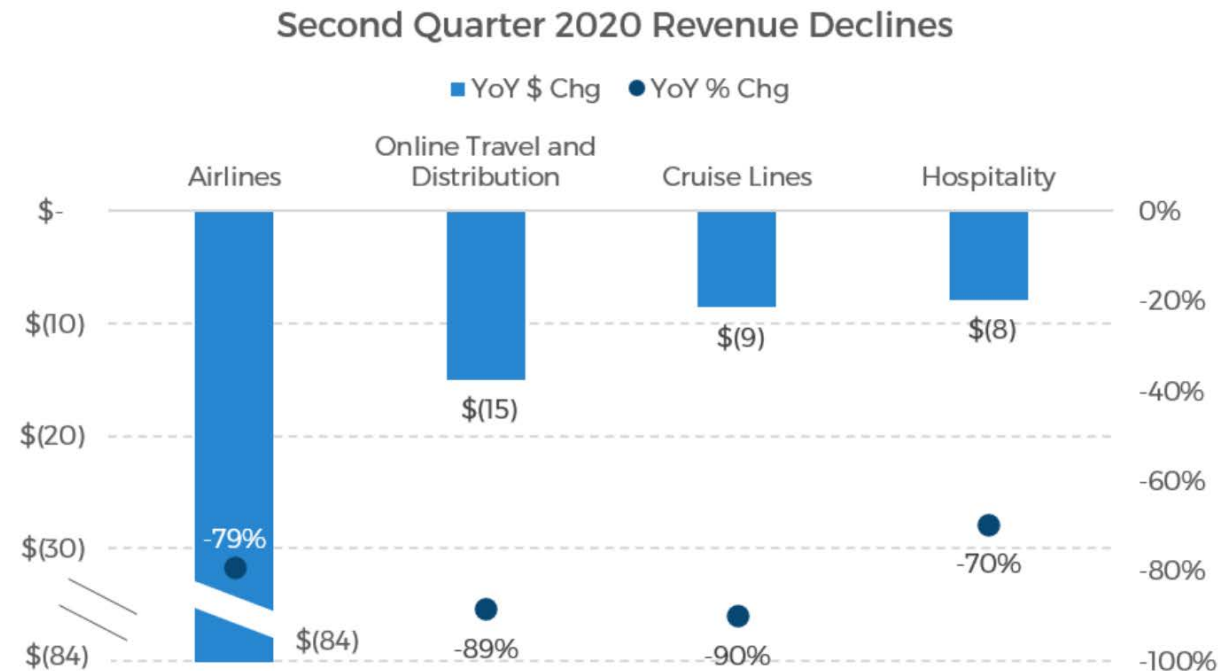
A positive change we'll see a lot if this week



Source: [Coronavirus Travel Sentiment Index Report, Destination Analysts, September 1st, 2020](#)

Skift Health Score reports travel companies are down 70-90% revenues in Q2

- Skift Research’s Skift Health Score, a proprietary metric that assesses the strengths of public travel companies, states second quarter earnings for 86 travel companies across hospitality, airline, cruise, and online travel and distribution sectors was “the ugliest earnings season the travel industry has ever seen”.
- Combined, the 86 companies that have reported second quarter earnings lost more than \$137 billion in revenue compared to the same period in 2019, representing 70-90% revenue declines in Q2 2020.



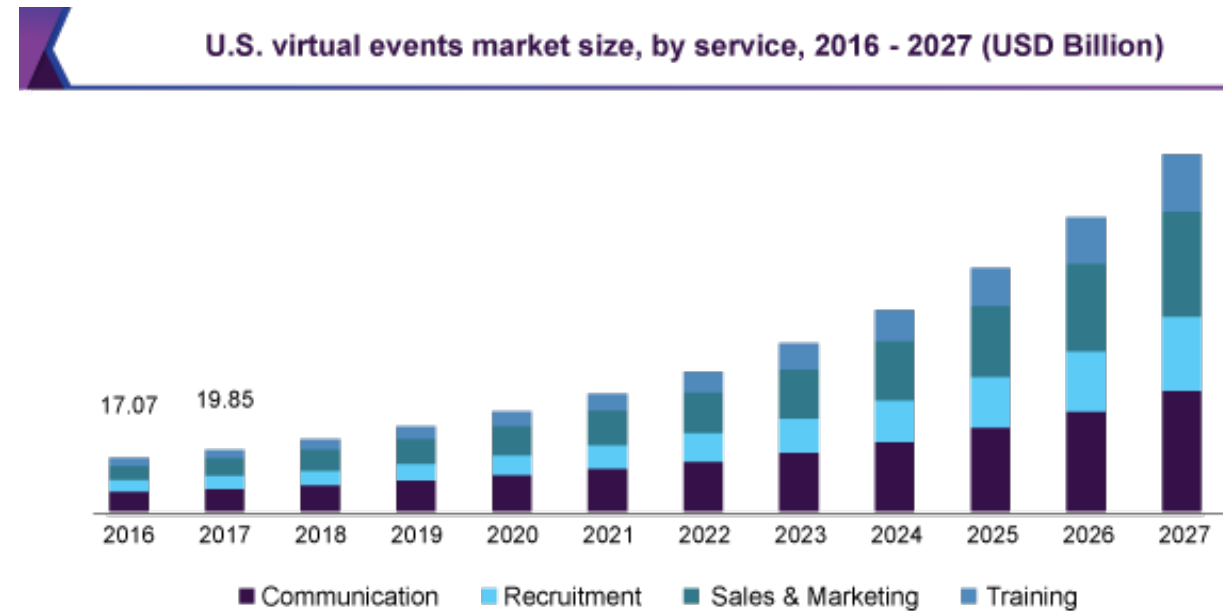
Source: Skift Research. Data as of August 2020. Note line break on the left-hand Y-axis.

Source: [Skift Health Score: August 2020, September 1st, 2020](#)



US virtual events market projected to reach more than \$400B by 2027

- According to Grandview Research, the global virtual events market in 2020 is \$90 billion and expected to reach more than \$400 billion by 2027, growing at a 23% CAGR.
- Virtual events cover a wide range of activities, from video and audio conferencing to live streaming and broadcasting.



Source: www.grandviewresearch.com

Source: [Virtual Events Market Size, Share & Trends Analysis Report By Event Type \(Internal, External, Extended\), By Service, By Establishment Size, By End Use, By Region, And Segment Forecasts, 2020 - 2027, Grandview Research, July 2020](#)



Tourism and COVID-19 dashboard and reporting resources

- 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 pulls together meetings and events information as well as links to several other resources helpful to the Business Events segment in our sector.
- Skift has a live roundup of [coronavirus-related tourism news](#), as well as a [global travel reopening timeline](#).
- The BC Tourism Resiliency Network hosts [tourism impact reports and travel pattern studies](#).
- Destination BC uses a [Signals & Sentiment dashboard](#) to follow core markets and inform their approach through COVID-19.
- Destination BC also hosts [general research and insights](#) on their website.
- The Travel and Tourism Research Association links to many [research & analytics companies](#) on their COVID-19 Resource Centre.





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

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