

# COVID-19 Research Roundup

October 5, 2020

Taylor Pass, Cariboo Chilcotin Coast

## *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 September 18, 2020, Canadian and US officials agreed to keep the border between the two countries closed to non-essential travel until at least October 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.

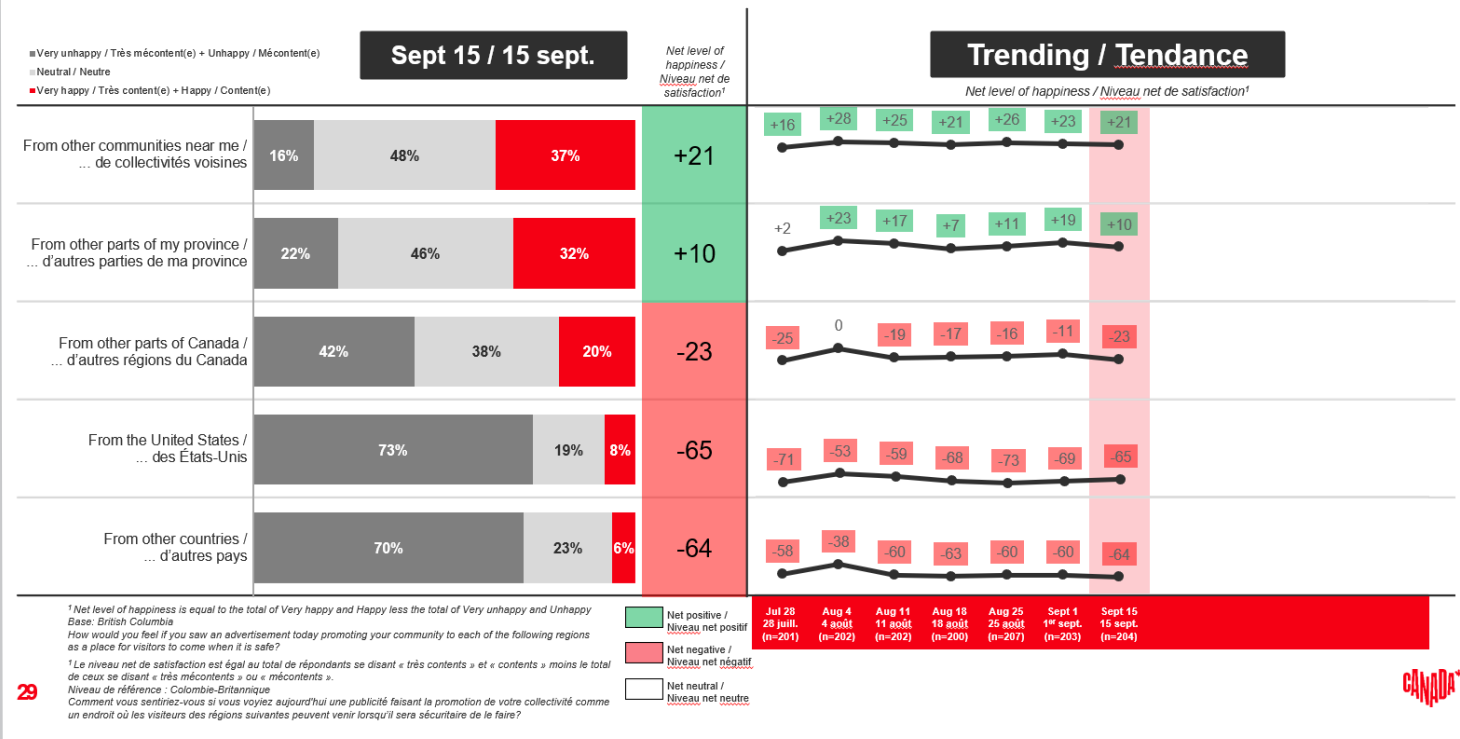
Last week in brief:

- BC residents are receptive to advertising to nearby communities, but less to other parts of BC
- Levels of concern of BC residents for welcoming visitors slowly trending down
- HelloBC.com traffic continues steep decline post-summer
- BC's weekly ADR continues decline for 2020
- BC's monthly ADR declines -38.6% year-over-year for August
- Visitation across BC remains down week ending September 27, compared to previous week
- Visitation is down -25% the week ending September 27 from similar week in 2019
- Canadians decreasingly receptive to offers encouraging travel
- 58% of travellers plan to take domestic trips for the rest of 2020
- Domestic flights reign while international travel begins to correct
- Confidence in travel safety is high for those already travelling
- Butchart Gardens tops the attraction list for overall comfort of BC residents
- Group travel and unique stays drive Airbnb traffic
- A mix of effective cleaning and visual cues may be key to hotel confidence
- The UNWTO has launched a new tourism recovery tracker
- Plus a roundup of tourism and COVID-19 dashboards and reporting resources

# BC residents are receptive to advertising to nearby communities, but less so to other parts of BC

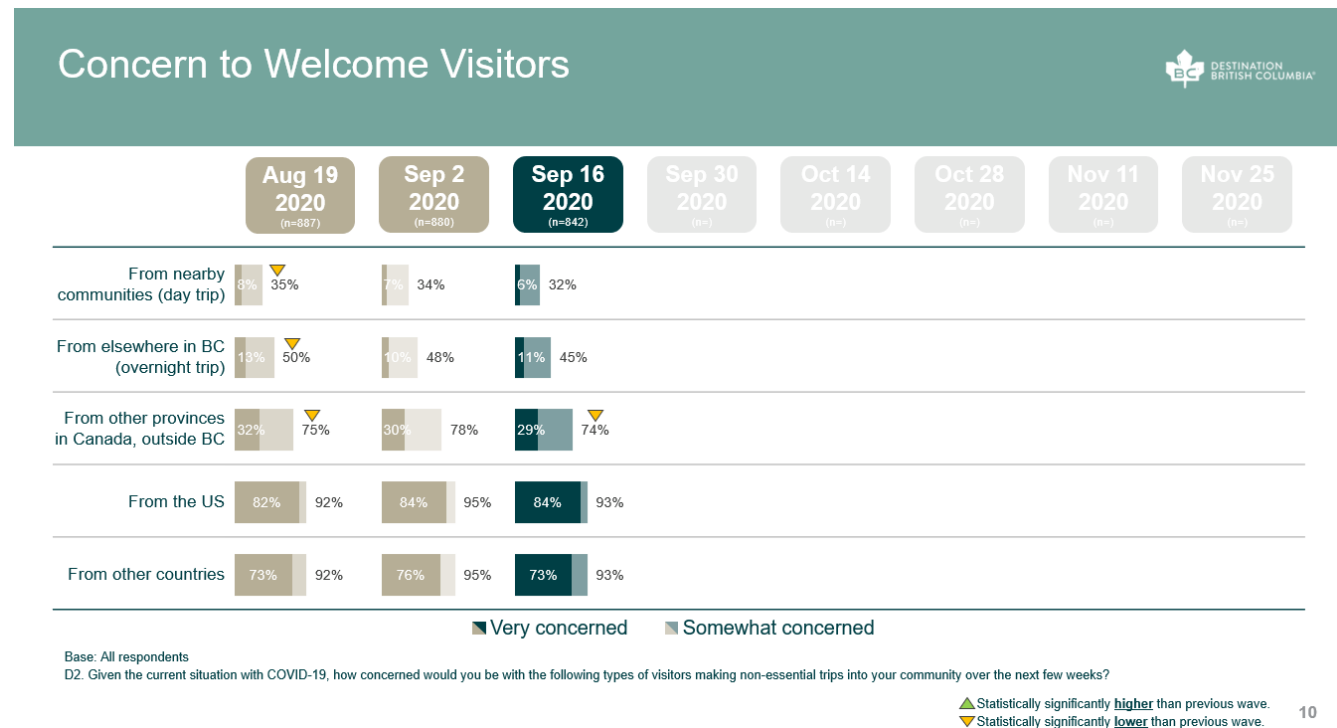
- Destination Canada's Resident Sentiment Wave 18 (September 15) report shows that BC residents have a +21 net level of happiness when it comes to advertising towards visitors from nearby communities. This is down 2 points from Wave 17.
- BC residents' happiness when it comes to advertising towards visitors from other parts of BC has dropped from +19 to +10.
- Urban residents have a +24 net level of happiness, while rural residents are at +8.
- Destination Canada has transitioned the cadence of the Resident Sentiment research to bi-weekly from weekly.

## British Columbia / Colombie-Britannique



# Levels of concern for welcoming visitors slowly trending down

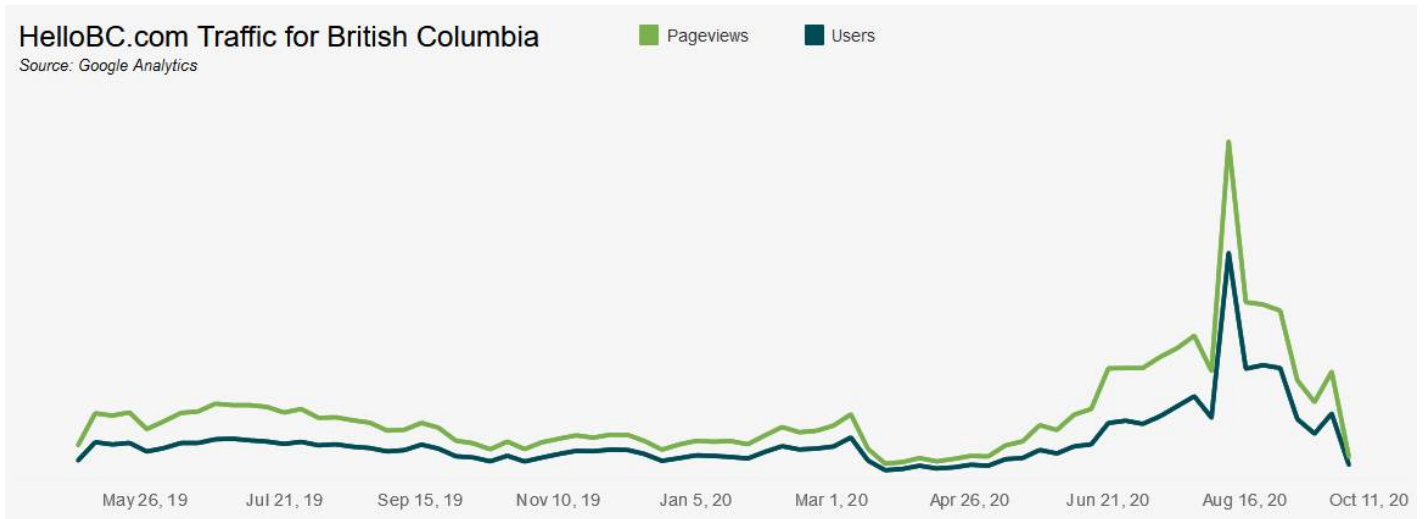
- Wave 10 (September 22) of Destination BC's BC Residents' Public Perceptions survey shows that 32% of BC residents are concerned with welcoming visitors into their community from surrounding areas, down 2 points from Wave 9.
- 45% are concerned with welcoming visitors from other parts of the province (down 3 points), and 74% from other parts of Canada (down 4 points).
- Comfort in participating in tourism-related activities remains largely unchanged, except for eating in a restaurant, which changed from 76% who 'would' in wave 9 to 71%.
- BC residents are still uncomfortable travelling by plane (20% comfortable) and cruise (8%), though likelihood to travel by car/RV for non-essential travel remains at 80% and taking a ferry is at 68%.



Source: [Destination BC's BC Residents Public Perceptions: COVID-19 Travel and Tourism Wave 10, Insights West, September 22, 2020](#)

## *HelloBC.com traffic continues steep decline post-summer*

- Travel-related Google searches for British Columbia continue to decline post-summer.
- Searches are down in October to April levels for the key terms “getting around in BC”, “places to visit: British Columbia” and “scenic drives/road trips”.
- These insights from Google 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.

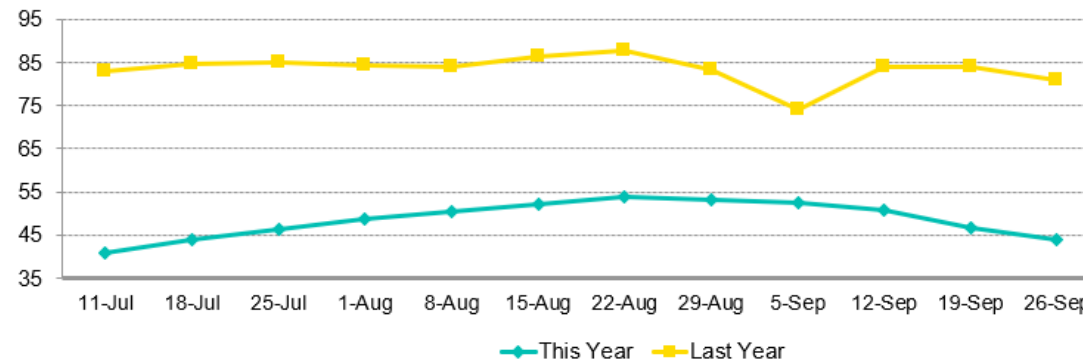


Source: [Signals & Sentiment Dashboard, Destination BC](#)

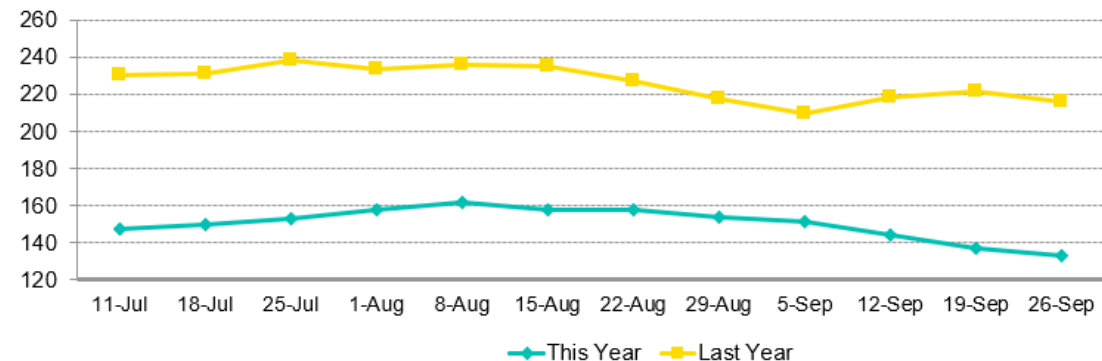
## BC's weekly ADR continues decline for 2020

- STR, an agency which captures BC hotel performance, shows the average weekly ADR for BC was \$133.18 for the week of September 20-26, which represents a -38.2% change year-over-year (September 22-28, 2019).
- Of the six cities tracked, the City of Vancouver saw the highest year-over-year rate of ADR percent change at -53.4%, followed by Richmond (-42.6%), Kamloops (-18.7%), Victoria (-18.4%), Kelowna (-14.5%), and Whistler (-12.1%).
- BC hotel occupancy was 44.0%. This represents a decrease of -6.9 points from the previous week and a decrease of -45.7 points compared to the previous year.

Weekly Occ (%) - Jul 11, 2020 to Sep 26, 2020



Weekly ADR - Jul 11, 2020 to Sep 26, 2020



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



## *BC's monthly ADR declines -31.2% year-over-year for the month of August*

- STR, an agency which captures BC hotel performance, shows the average monthly ADR for BC in August was \$157.68. This represents a -31.2% change year-over-year.
- Of the six cities tracked, the City of Vancouver saw the highest year-over year-rate of ADR percent change at -49.9%, followed by Richmond (-38.2%), Victoria (-29.6%), Whistler (-15.1%), Kamloops (-18.3%), and Kelowna (-6.9%).
- BC hotel occupancy in August was 52.4%. This represents a decrease of -38.6 points compared to the previous year.

Destination	August 2020 Average Daily Room Rate	Percent Change (over similar 2019 period)
British Columbia Overall	\$157.68	-31.2%
Vancouver (City of)	\$160.04	-49.9%
Whistler	\$227.68	-15.1%
Victoria	\$177.90	-29.6%
Kelowna	\$196.83	-6.9%
Kamloops	\$109.80	-18.3%
Richmond	\$131.37	-38.2%

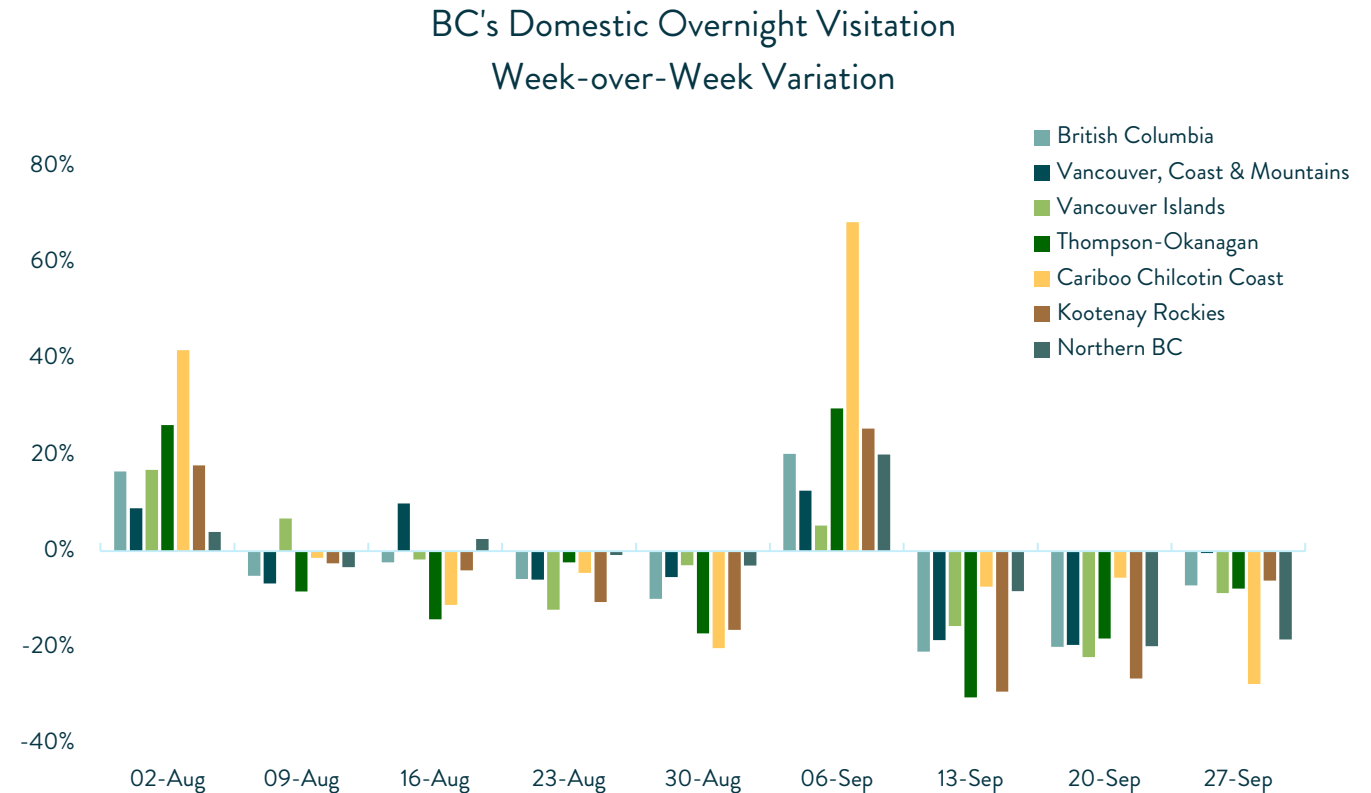


Source: [2020 STR, STR Global Ltd – 28 Day Running Period August 2 – 29, 2020](#)



# Visitation across BC remains down week ending September 27, compared to previous week

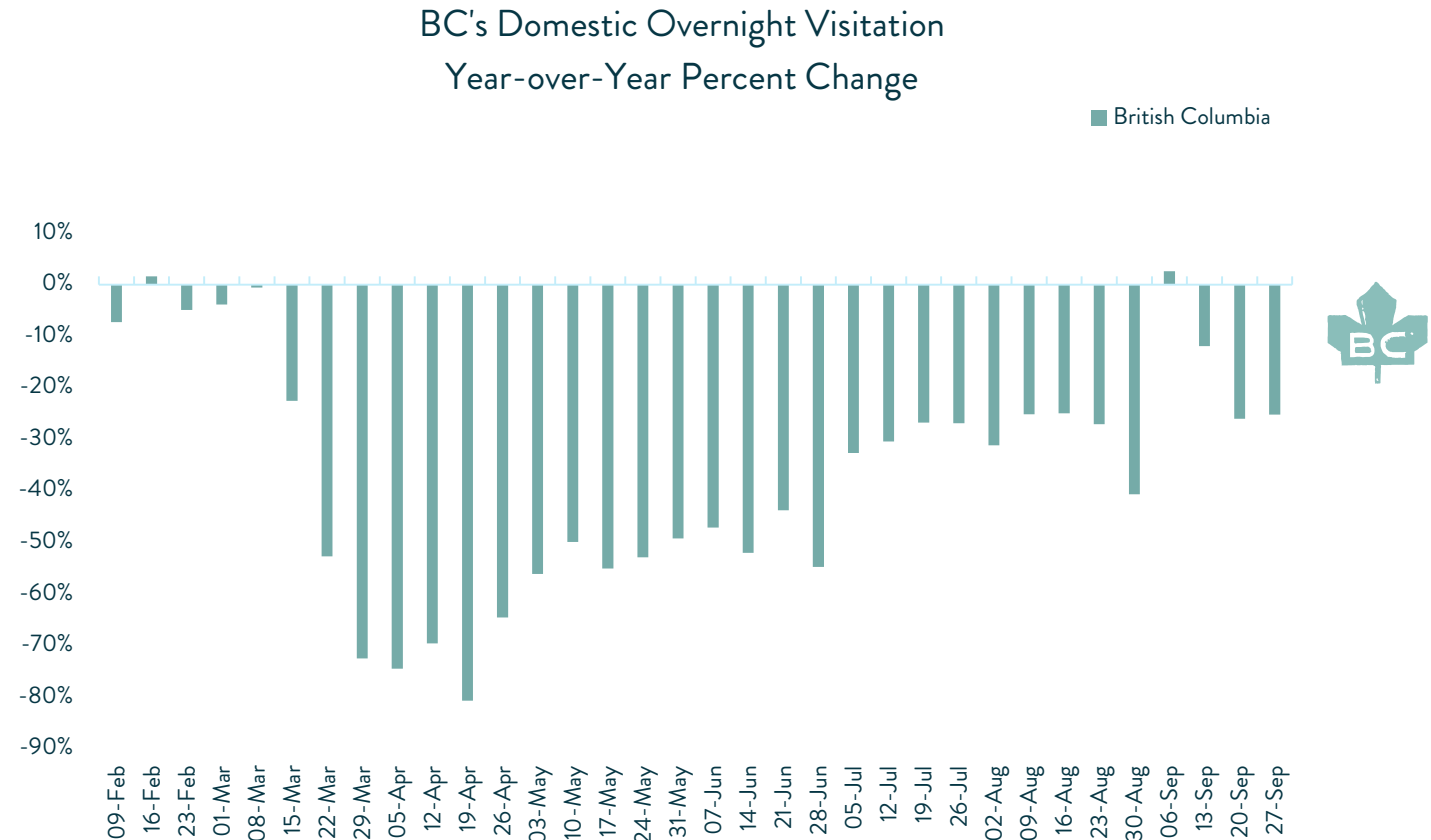
- According to Environics Analytics Weekly COVID Tracker Report, during the week ending September 27, BC experienced a week-over-week decrease in domestic overnight visitation (-7.1%) from the previous week.
- All areas across the province saw week-over-week decreases in movement as well:
  - Cariboo Chilcotin Coast (-27.6%)
  - Northern BC (-18.4%)
  - Vancouver Island (-8.7%)
  - Thompson Okanagan (-7.8%)
  - Kootenay Rockies (-6.1%)
  - Vancouver, Coast & Mountains (-0.4%)



Source: [Environics Analytics Weekly COVID Tracker Report, September 27, 2020](#)

# Visitation is down -25% the week ending September 27 from similar week in 2019

- Environics Analytics also reports year-over-year analysis in the Weekly COVID Tracker Report.
- Following the first year-over-year increase since mid-February during the week ending September 6, BC resumed the year-over-year decrease in visitation trend for the third consecutive week. For the week ending September 27, overnight domestic visitation was down -25.2%, compared to the same week in 2019.
- While year-over-year increases in visitation were not seen in the majority of tourism regions across BC, such as Vancouver, Coast and Mountains (-33.3%), Vancouver Island (-30.6%), Northern BC (-21.6%), Thompson Okanagan (-18.9%), and Kootenay Rockies (-10.5%), increases in visitation were seen in the Cariboo Chilcotin Coast (+14.6%).



Source: [Environics Analytics Weekly COVID Tracker Report, September 20, 2020](#)

# Canadians decreasingly receptive to offers encouraging travel

- According to Destination Canada's Global Tourism Watch COVID Special Survey Wave 3 – (September), Canadians are decreasingly receptive to offerings that encourage travel in the near future.
- Full ticket refunds, discounted travel deals, and free cancellations are the most likely to encourage travel. However, 33% say that none of the listed offerings would encourage them to make a booking in the near future.
- The full report, covering Canadian travel intentions, domestic resident characteristics and COVID-related topics, can be found on [Destination BC's Research & Insights COVID-19](#) webpage, including Wave 1 and 2 reports.

## Offerings to Encourage Travel in Near Future

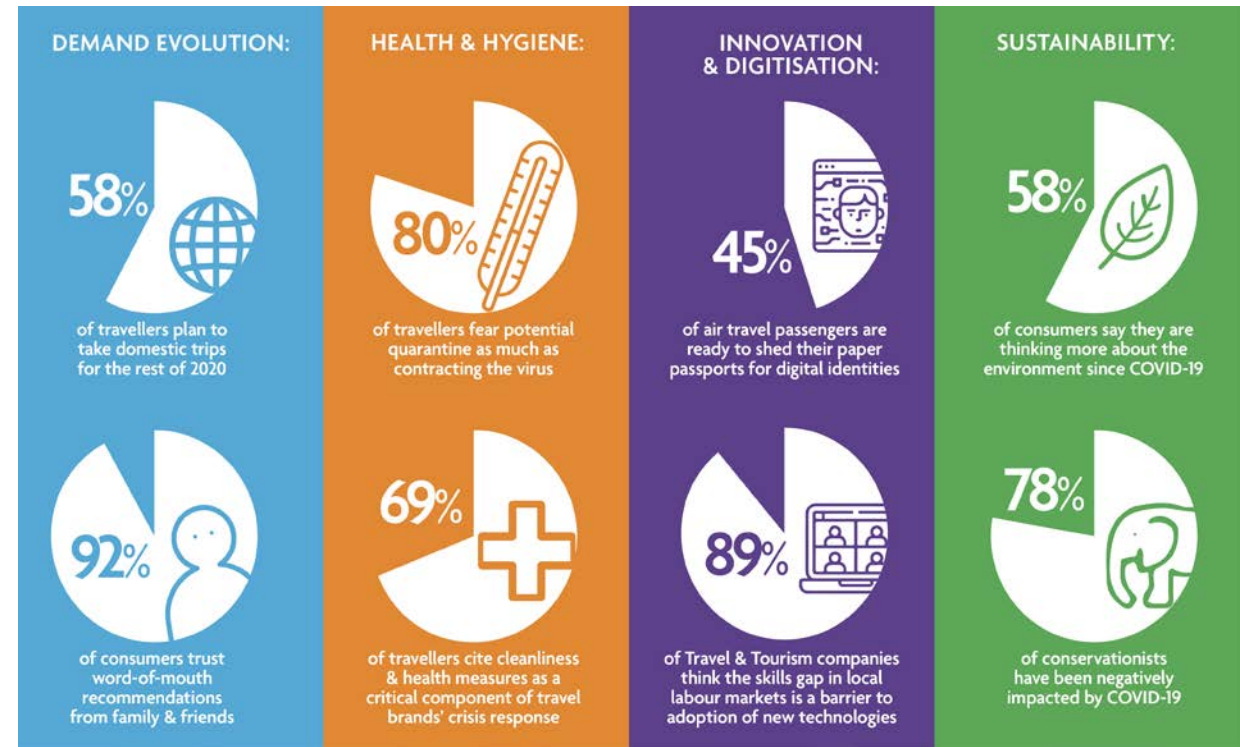
	TOTAL	BC	AB	SK	MB	ON	QC	NB	NS	PE	NL
	W1 (n=9050) W2 (n=9050) W3 (n=9050)	W1 (n=1500) W2 (n=1500) W3 (n=1500)	W1 (n=1500) W2 (n=1500) W3 (n=1500)	W1 (n=500) W2 (n=500) W3 (n=500)	W1 (n=500) W2 (n=500) W3 (n=500)	W1 (n=2100) W2 (n=2100) W3 (n=2100)	W1 (n=1500) W2 (n=1500) W3 (n=1500)	W1 (n=400) W2 (n=405) W3 (n=407)	W1 (n=400) W2 (n=424) W3 (n=419)	W1 (n=250) W2 (n=236) W3 (n=219)	W1 (n=400) W2 (n=385) W3 (n=405)
Full ticket refund	25% 26% 20% ▼	31% 29% 22% ▼	27% 29% 21% ▼	26% 25% 22%	22% 29% 20% ▼	26% 26% 21% ▼	21% 22% 16% ▼	18% 24% 16% ▼	26% 22% 21%	18% 36% 19% ▼	30% 30% 27%
Discounted travel deal	19% 17% 13% ▼	19% 16% 11% ▼	22% 20% 14% ▼	19% 16% 10% ▼	19% 19% 11% ▼	18% 18% 13% ▼	20% 14% 14%	14% 14% 12%	18% 8% 13%	20% 8% 6%	21% 14% 14%
Free cancellations	15% 16% 14% ▼	16% 19% 15% ▼	15% 16% 14%	14% 18% 11% ▼	16% 15% 11%	15% 15% 13%	15% 15% 15%	16% 16% 11%	15% 13% 10%	12% 16% 15%	12% 12% 11%
Travel insurance offer	5% 5% 4% ▼	5% 5% 4%	4% 4% 2% ▼	5% 5% 4%	6% 3% 4%	4% 5% 4% ▼	6% 6% 5%	3% 3% 3%	3% 2% 2%	4% 4% 1%	6% 4% 1%
Waived booking fees	3% 2% 2%	2% 2% 1%	2% 1% 2%	2% 3% 2%	2% 1% 2%	3% 3% 2%	3% 2% 2%	1% 1% 3%	1% 1% 2%	3% 2% 1%	2% 2% 1%
None of the above would encourage me to make a travel booking in the near future	32% 33% 33%	26% 27% 30%	28% 27% 31%	34% 31% 38%	34% 32% 42% ▲	32% 31% 30%	34% 40% 38%	47% 41% 42%	36% 51% 40% ▼	40% 32% 41%	29% 38% 36%



Source: [Global Tourism Watch COVID Special Survey Wave 3, Destination Canada, August, 2020](#)

## *58% of travellers plan to take domestic trips for the rest of 2020*

- According to a new report by the World Travel & Tourism Council, significant new trends have emerged due to COVID-19.
- 58% of global travellers are planning to take domestic trips for the rest of 2020, and preferences have shifted toward what is familiar, predictable, and trusted.
- 92% trust word-of-mouth recommendations from friends over advertising.
- For 80% of travellers, the fear of potential quarantine is as strong as the fear of contracting the virus.
- 89% of travel and tourism companies believe a barrier to their adoption of new technologies is a gap in the skills of local labour.



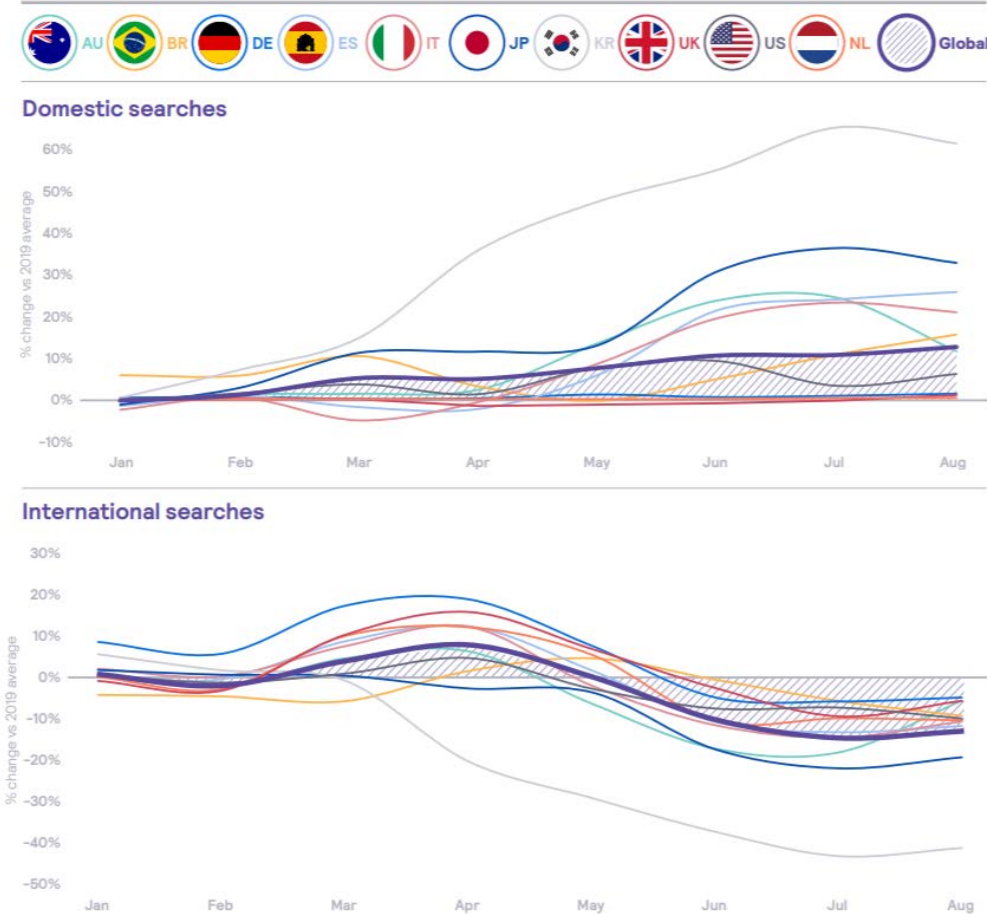
Source: [To Recovery & Beyond](#), World Travel & Tourism Council, September 27, 2020





## *Domestic flights reign while international travel begins to correct*

- A new report by Skyscanner shows that searches for domestic travel continue to reign. However, international searches are slowly beginning to recover.
- The beginning of the pandemic saw a massive increase in searches for one-way tickets as travellers sought to get home. The trend remains as people still look to reposition themselves for the pandemic or look to maintain flexibility.
- After a large spike in searches for travel, with a departure date in less than a week, seen at the beginning of the pandemic, searches for travel within 7-30 days is recovering slowly.



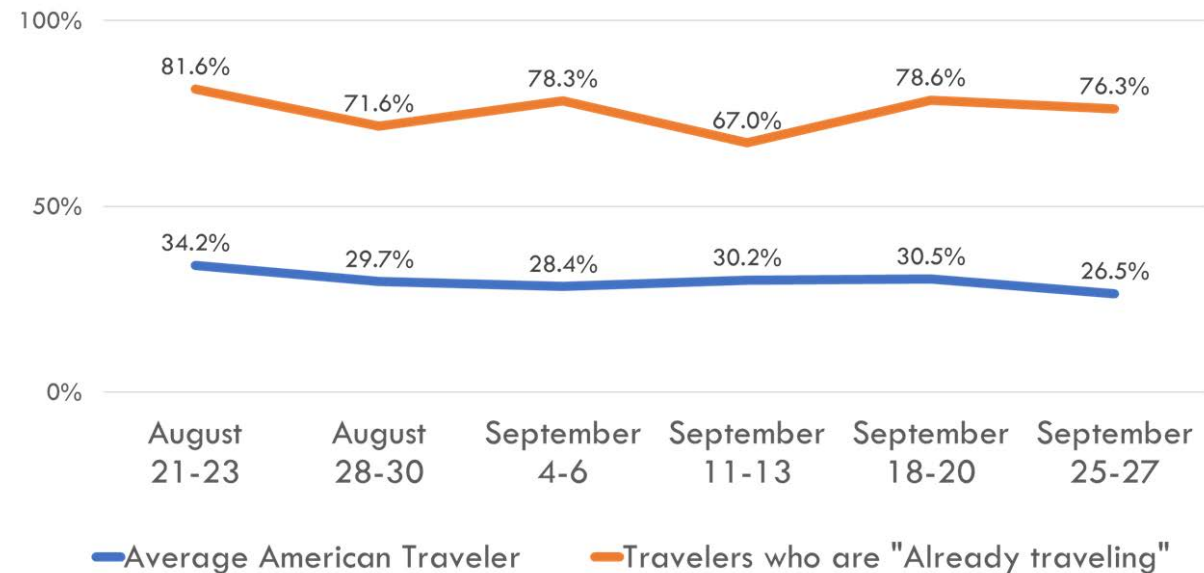
Source: [New World of Travel, Skyscanner, 2020](#)

## Confidence in travel safety is high for those already travelling

- According to Destination Analysts, Americans who are already travelling are confident that they can travel safely.
- While just over a quarter of the average American traveller feels confident that they can travel safely in the current environment, over three quarters of those already travelling feel confident.
- These travellers still take precautions, including seeking airlines that are taking extra measures for safety, wearing personal protective equipment, and using hand sanitizer.

### How confident are you that you can travel safely in the current environment?

% who are "Confident" or "Very confident"

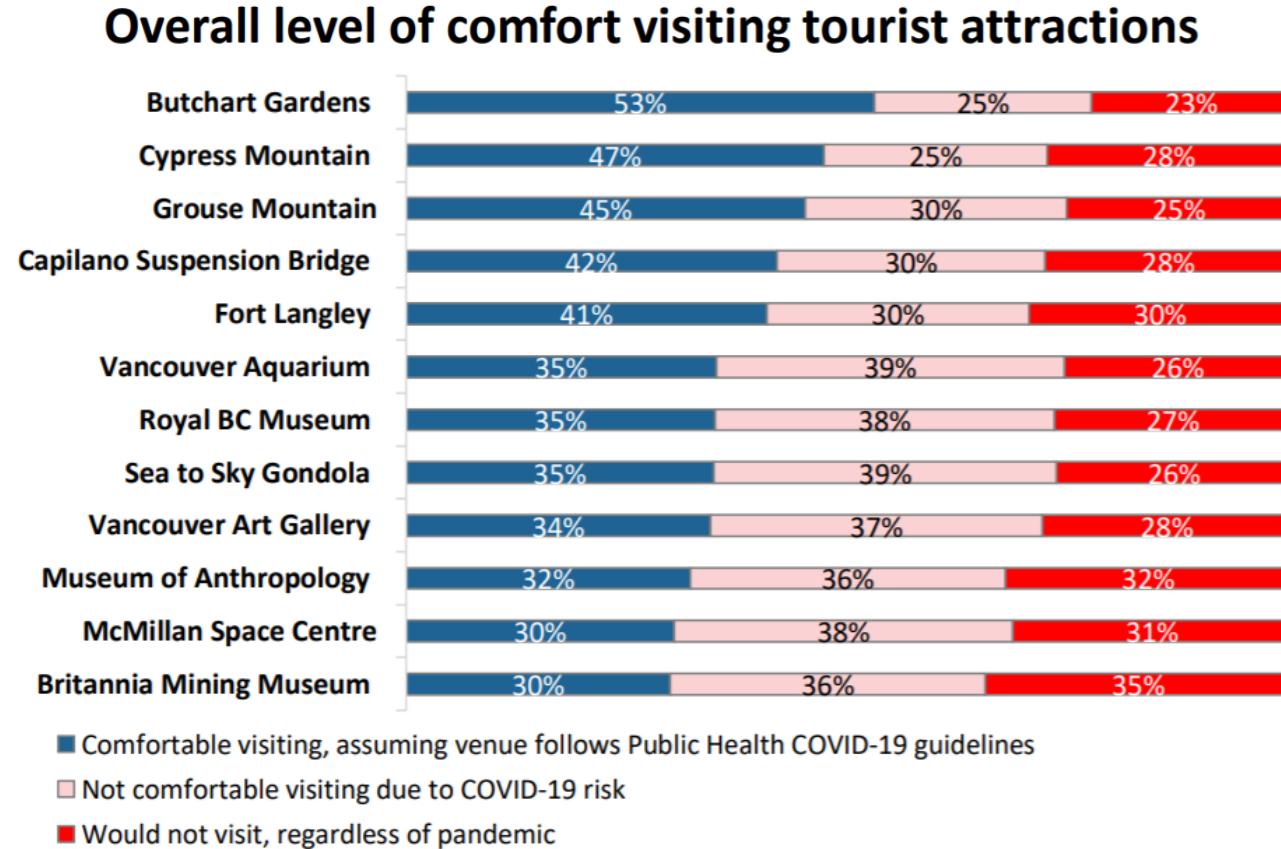


Source: [Destination Analysts, September 29, 2020](#)



## *Butchart Gardens tops the attraction list for overall comfort of BC residents*

- A new survey from Leger collected responses from BC residents aged 18 and older between September 4 and 6 on their overall level of comfort visiting various tourist attractions in BC.
- Results showed that the attractions BC residents are most comfortable visiting during the pandemic are the Butchart Gardens (53%), Cypress Mountain (47%), Grouse Mountain (45%), Capilano Suspension Bridge (42%) and Fort Langley (41%).



Source: [Tourist Attractions in BC, Leger, September, 2020](#)

## *Group travel and unique stays drive Airbnb traffic*

- According to Airbnb Tourism Recovery Insights for September/October 2020, the share of cabin bookings made by US travellers have more than doubled from 2019, compared to apartments, which decreased by half.
- Guests are looking to stay in unique places. For wish lists, shepherds' huts almost doubled in July compared to 2019, barns increased 60%, cabins 40%, and cottages 30%.
- Family and small-group travel continues to be a strong driver. Groups made up more bookings than solo travellers, and 12% of searches included the pet-friendly amenity filter.

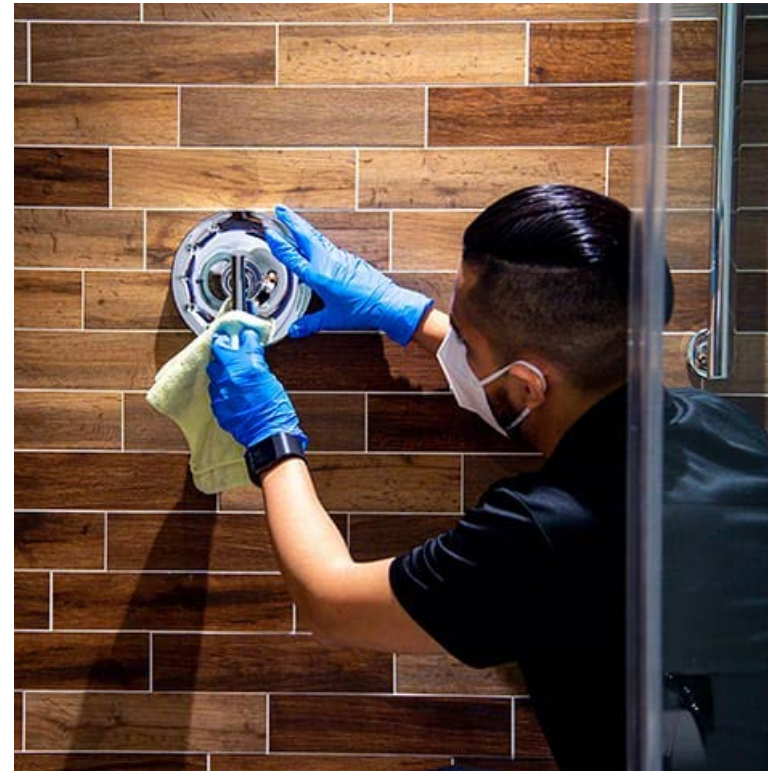


Source: Airbnb Tourism Recovery Insights September/October 2020



## *A mix of effective cleaning and visual cues may be key to hotel confidence*

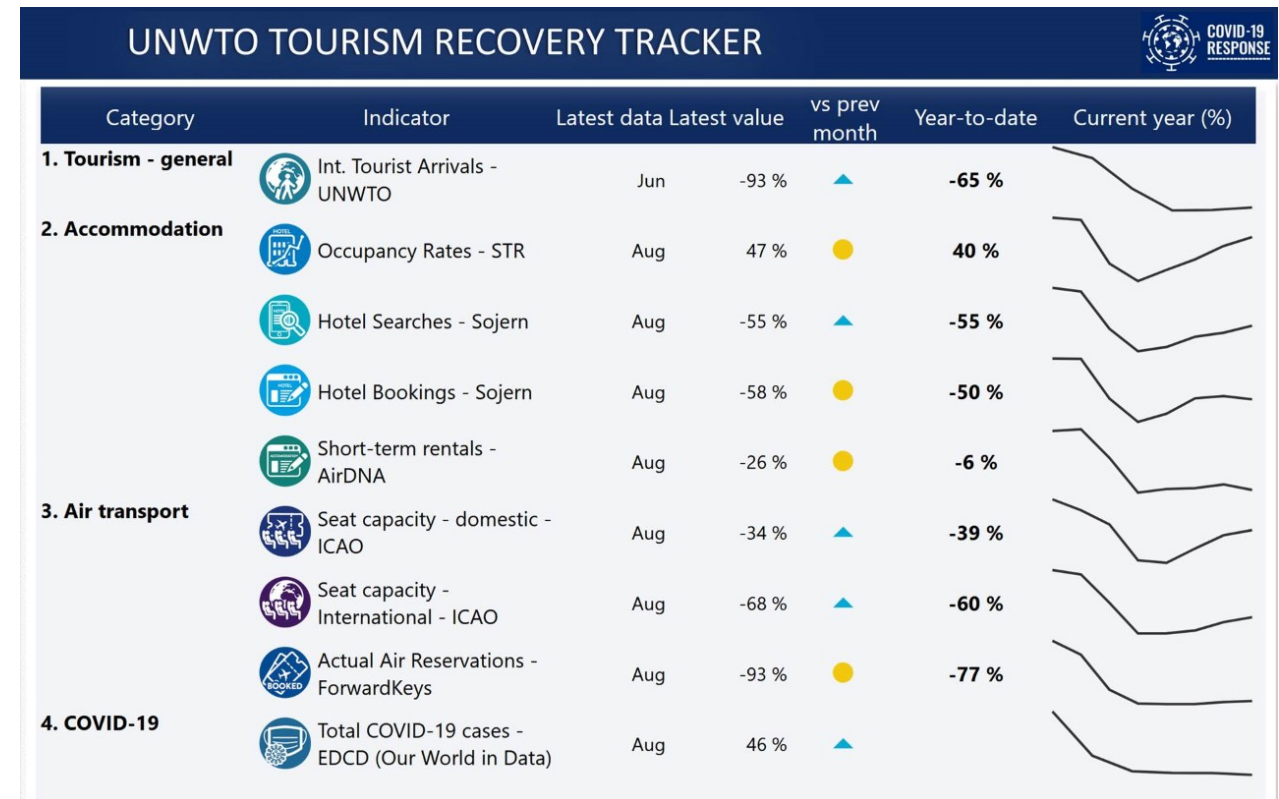
- A recent Skift article shows that after criticisms towards hotel chains about using “hygiene theater” instead of effective safety measures, many large hotel chains are stepping up their cleaning protocols.
- New protocols may now include cleaning with electrostatic sprayers, extra attention to high touch points, and offering contactless hotel sprays.
- Some hotels are finding that visual cues such as cleaning high-traffic areas while busy are important to maintain confidence in guests.



Source: [Skift, September 2020](#)

## The UNWTO has launched a new tourism recovery tracker

- The UNWTO has launched a comprehensive tourism dashboard.
- The dashboard is a collaborative effort between international organizations and the private sector, including International Civil Aviation Organisation (ICAO), ForwardKeys, STR, Sojern and AIRDNA.
- The dashboard includes data on international tourist arrivals, seat capacity in international and domestic air routes, air travel bookings, hotel searches and bookings, occupancy rates, and demand for short term rentals.



Source: [UNWTO, 2020](#)

# *Tourism and COVID-19 dashboard and reporting resources*

- Destination BC developed a [Signals & Sentiment dashboard](#) to follow core markets and inform their approach through COVID-19. We also conduct and commission general [research and insights](#) related to travel and tourism in British Columbia, as well as [COVID-19 Research and Insights](#).
- **NEW:** The UNWTO has [launched a new tourism recovery tracker](#), the most comprehensive tourism dashboard to date.
- 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 industry.
- 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](#).
- The Travel and Tourism Research Association links to many [research & analytics companies](#) on their COVID-19 Resource Centre.





## DESTINATION BRITISH COLUMBIA®

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

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