

# COVID-19 Research Roundup

October 26, 2020

Radium Hot Springs, Kootenay National Park



## *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 October 19, 2020, Canadian and US officials agreed to extend the closure of the border between the two countries to non-essential travel until at least November 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.





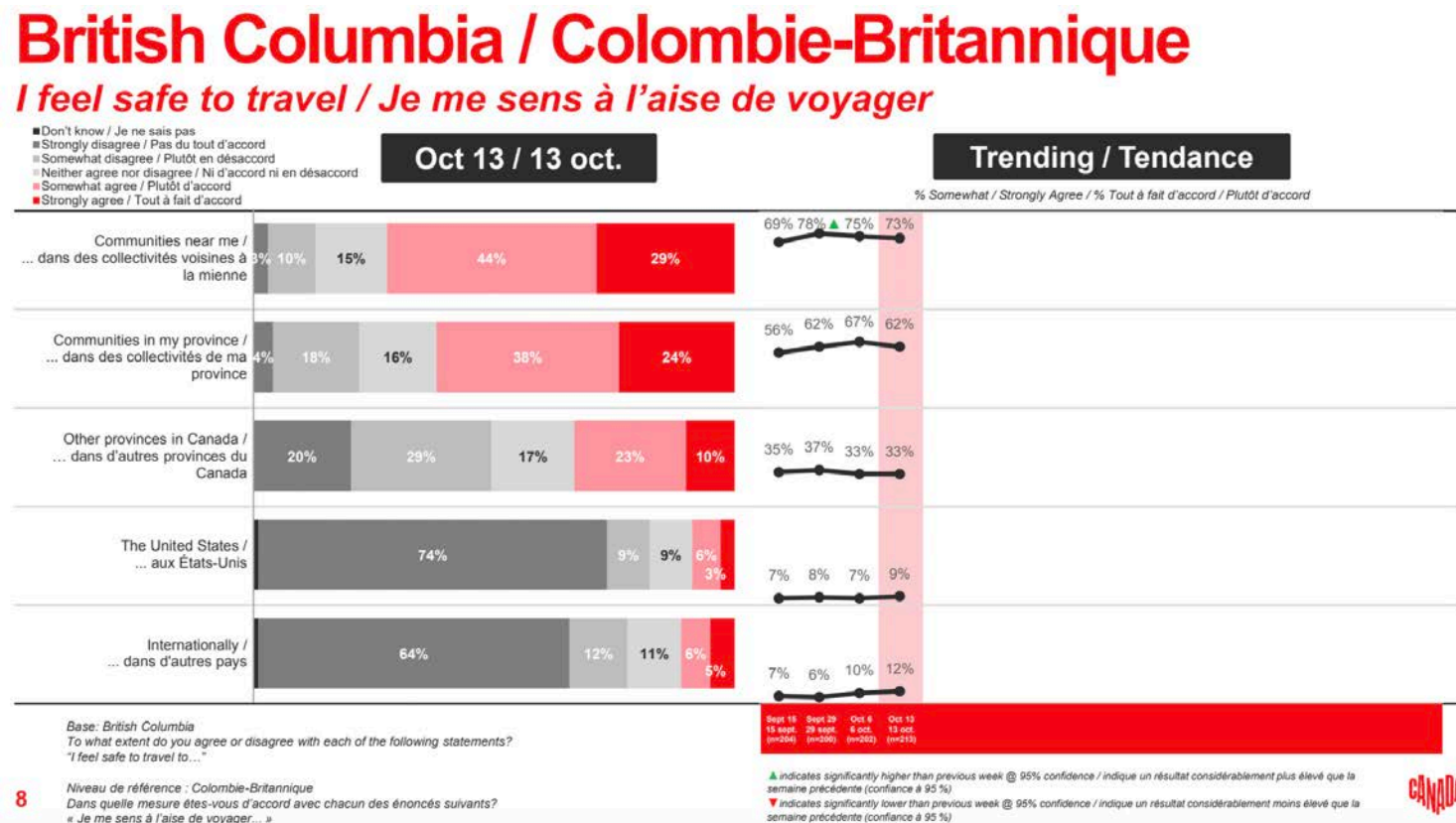
Destination BC is rounding up relevant research and articles each week related to the travel and tourism industry and COVID-19.

Last week in brief:

- BC residents remain stable in sentiments towards travel and welcoming visitors
- Increase in percentage of BC residents who would only travel if a vaccine was available
- Week-over-week domestic movement down across the province
- Year-over-year domestic movement down overall for the province
- BC hotel occupancy for the week of October 11 dropped -27.2 points from 2019
- Occupancy higher amongst BC's more economical hotels
- BC sees the second-most airline bookings since the pandemic began
- Q4 business events in Canada are at high-risk of being cancelled
- 27% of Canadians believe we are currently in the worst period of the COVID-19 crisis
- Good weather / climate is the top reason Canadians travel internationally
- Most Americans have a ready-to-travel state of mind
- Americans are less likely to travel before July 2021 than Europeans
- Tourism and COVID-19 dashboard and reporting resources available

## *BC residents remain stable in sentiments towards travel and welcoming visitors*

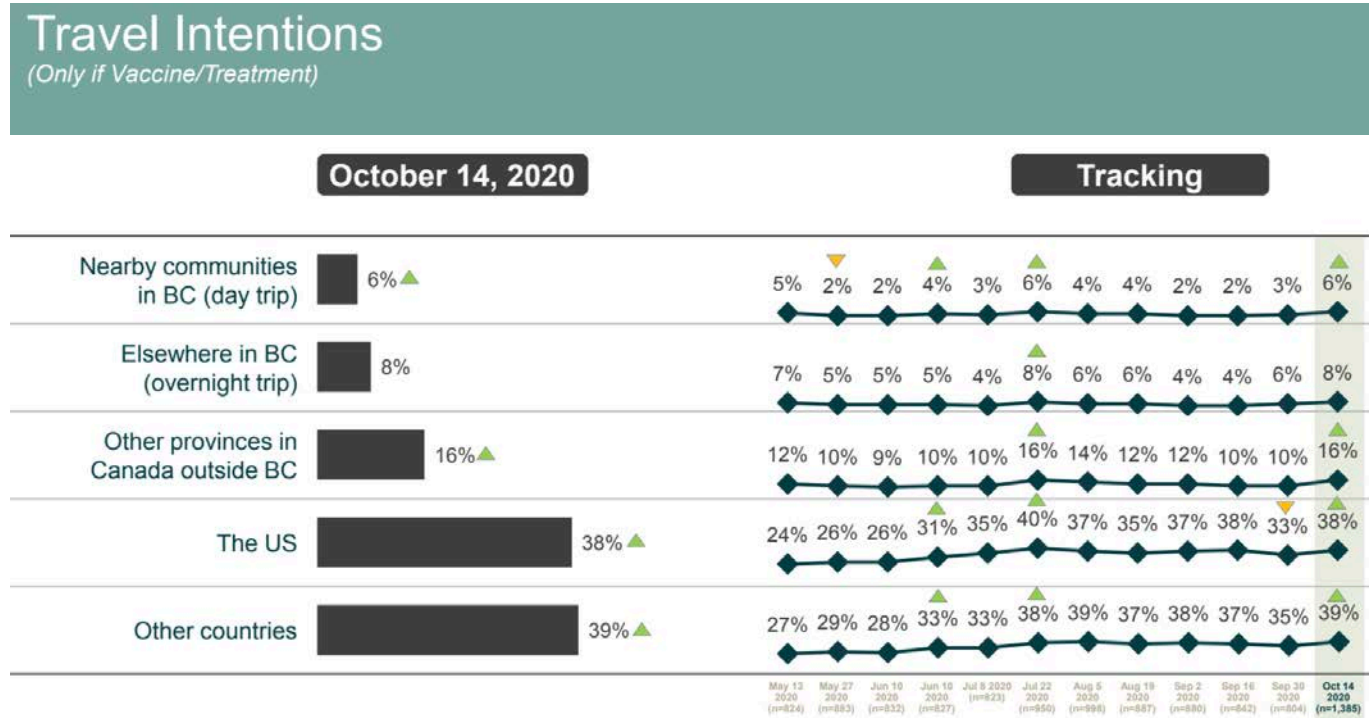
- In Destination Canada's Wave 21 (October 13) report, feelings of safety towards travelling to any travel destination remained stable for BC residents, with 73% of BC residents strongly or somewhat agreeing that they feel safe to travel to a nearby community, compared to 33% for travel to another province.
- BC residents also remained stable in their receptivity towards visitors travelling to their community, with 57% strongly or somewhat agreeing they would welcome visitors from other parts of the province.
- BC and Alberta residents are more likely than Ontario and Quebec residents to welcome visitors from within their own province.



Source: [Destination Canada's Weekly Resident Sentiment, Wave 21, Leger, October 13, 2020](#)

# Increase in percentage of BC residents who would only travel if a vaccine was available

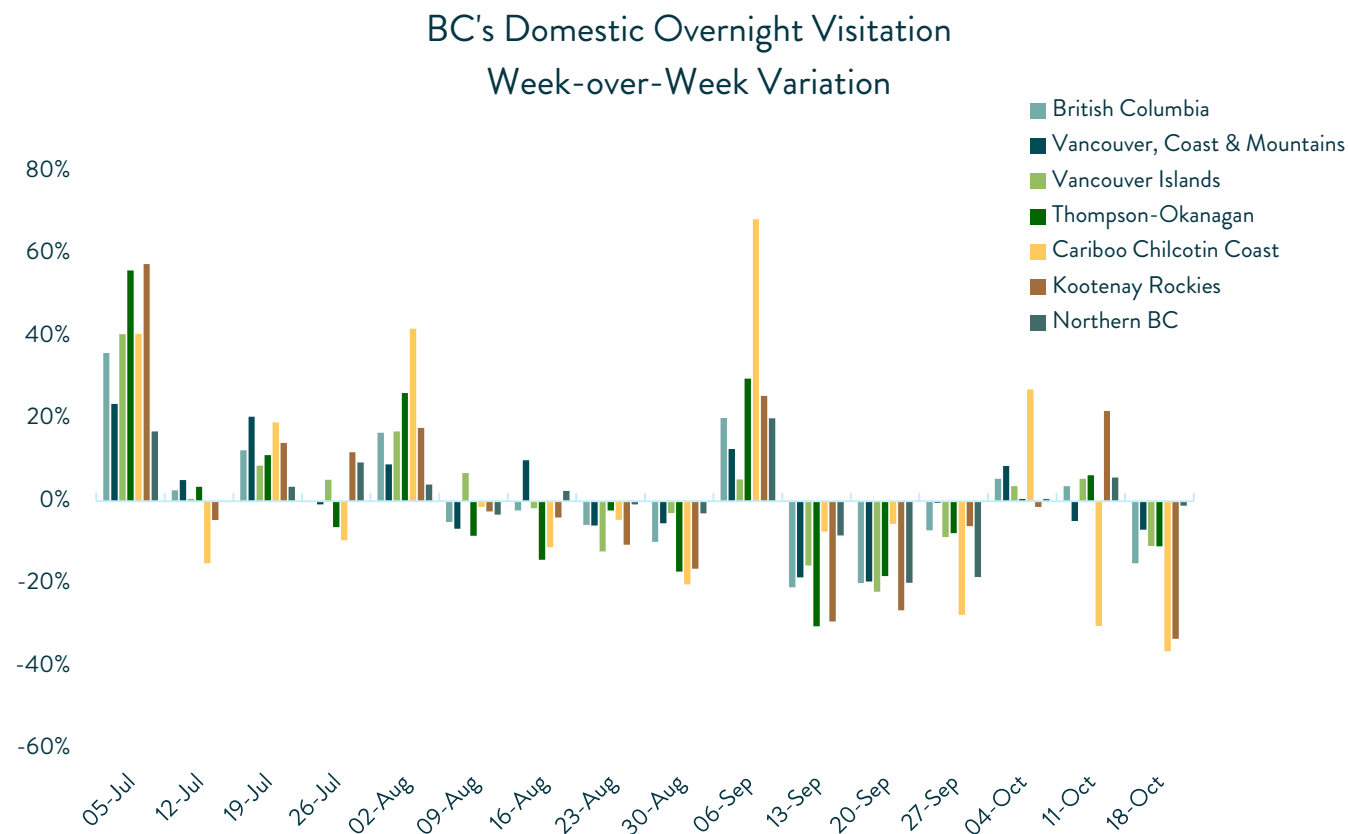
- Wave 12 (October 19) of Destination BC's BC Residents' Public Perceptions survey shows that the percentage of BC residents who report they would only travel if a vaccine / treatment is available increased to 6% (up from 3% in the previous wave) for travel to nearby communities, 16% (up from 10%) for travel to other provinces, and 38% (up from 33%) for travel to the US.
- BC residents' intention to travel within BC for an overnight trip in the next four weeks has fallen to 17% (from 29% on September 30). This decline is likely in part due to a typical decline in travel seen during the fall season.



Source: [Destination BC's BC Residents' Public Perceptions: COVID-19 Travel and Tourism Wave 12, Insights West, October 19, 2020](#)

## *Week-over-week domestic movement down across the province*

- According to Environics Analytics Weekly COVID Tracker Report, during the week ending October 18, BC experienced a week-over-week decrease in domestic overnight visitation (-15.1%) from the previous week.
- All regions across the province saw week-over-week decreases in movement compared to the previous week.
  - Cariboo Chilcotin Coast (-36.4%)
  - Kootenay Rockies (-33.4%)
  - Thompson Okanagan (-11.0%)
  - Vancouver Island (-10.9%)
  - Vancouver, Coast & Mountains (-6.9%)
  - Northern BC (-1.1%)

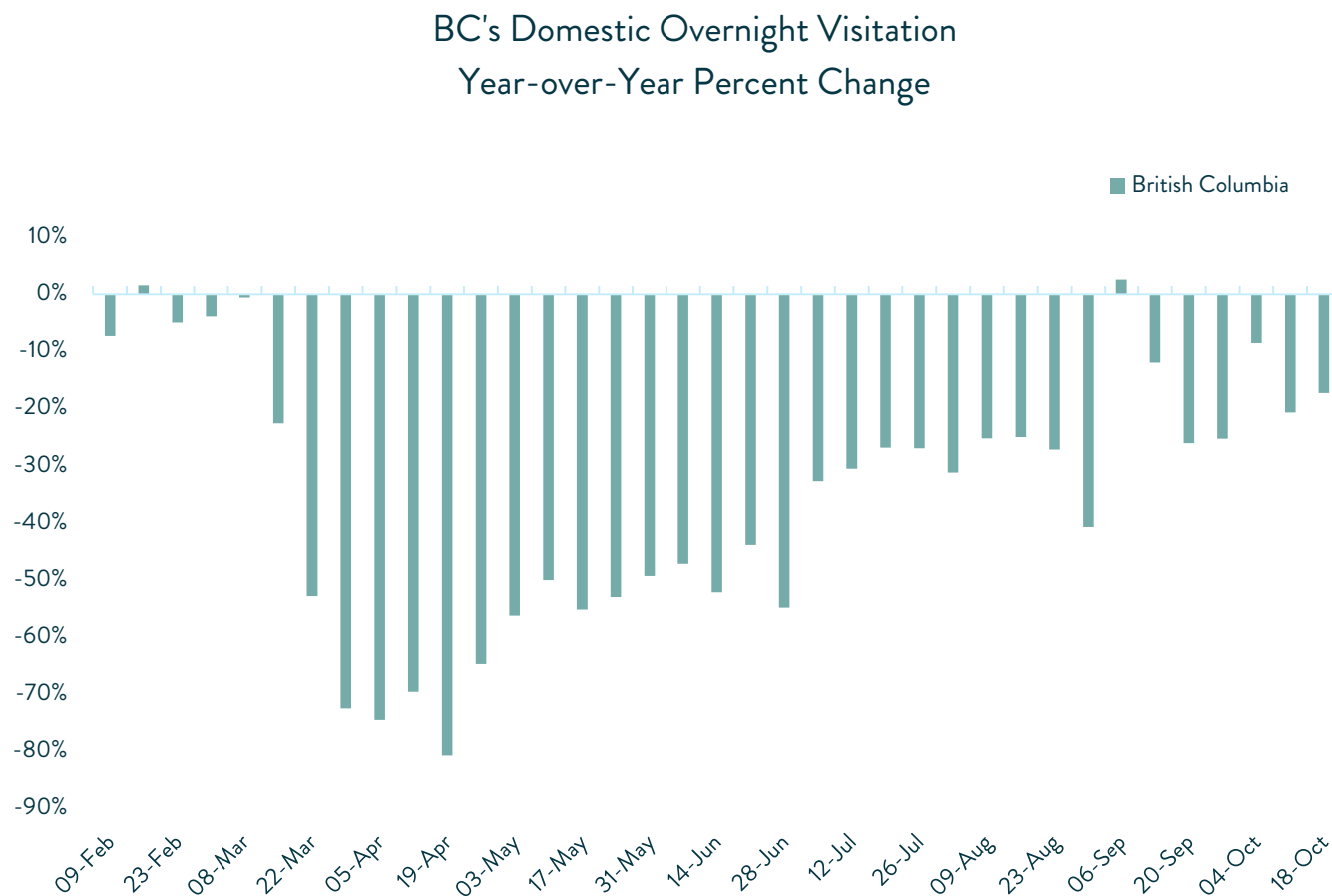


Source: [Environics Analytics Weekly COVID Tracker Report, October 18, 2020](#)



## *Year-over-year domestic movement down overall for the province*

- Environics Analytics also reports year-over-year analysis in the Weekly COVID Tracker Report.
- For the sixth consecutive week, BC's overnight domestic visitation was down (-17.2%) for the week ending October 18, compared to the same week in 2019.
- A year-over-year increase in visitation was seen in the Kootenay Rockies (+13.2%), however, decreases in visitation were seen to the following tourism regions:
  - Vancouver, Coast and Mountains (-28.6%)
  - Vancouver Island (-21.4%)
  - Cariboo Chilcotin Coast (-20.4%)
  - Northern BC (-0.3%)
  - Thompson Okanagan (-0.2%)

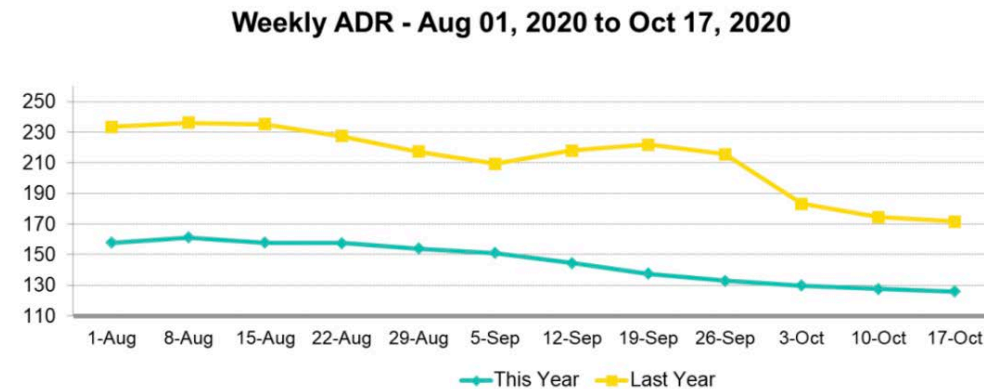
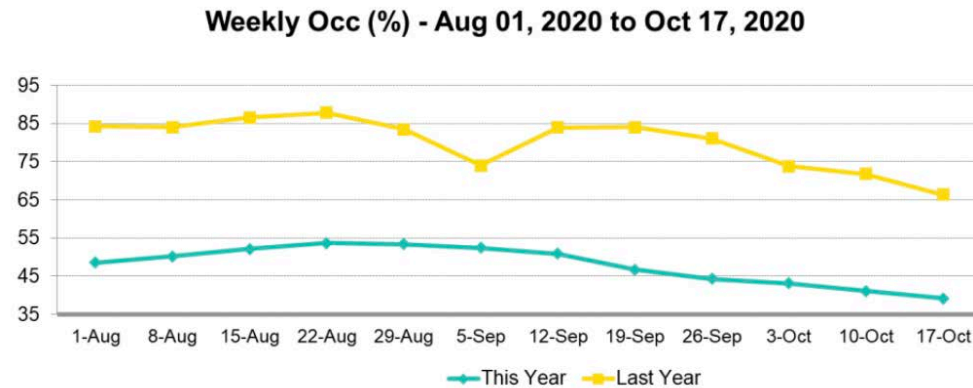


Source: [Environics Analytics Weekly COVID Tracker Report, October 18, 2020](#)



## *BC hotel occupancy for the week of October 11 dropped -27.2 points from 2019*

- STR, an agency which captures BC hotel performance, shows the average weekly occupancy for BC was 39.1% for the week of October 11-17. This represents a decrease of -5.1% or 2.1 points from the previous week and a decrease of -41.0% or -27.2 points, compared to the previous year.
- BC's average daily rate (ADR) was \$125.93 for the week of October 11-17. This represents a 0.4% decrease from the previous week, and a decrease of 26.6% compared to 2019.



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

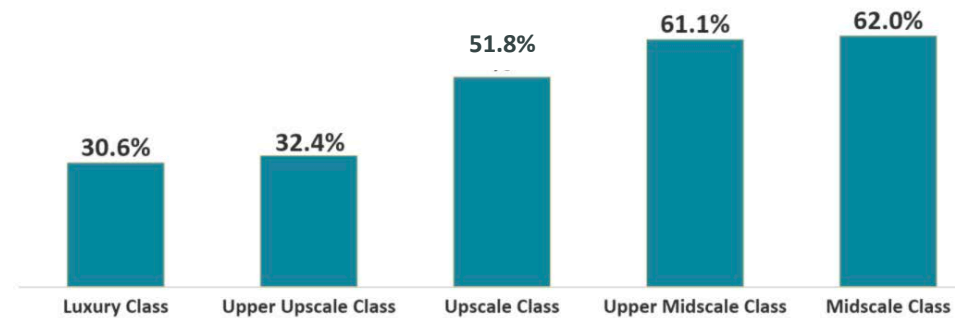




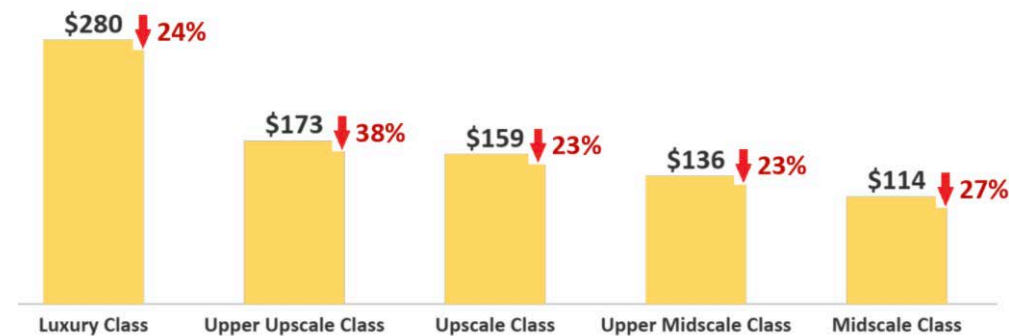
## Occupancy higher amongst BC's more economical hotels

- According to STR data as reported by the BC Hotel Association, the hotel occupancy for the week of September 5-12 was highest amongst more economical hotels in the midscale and upper midscale classes.
- ADR is down across hotel classes, most significantly amongst the upper upscale class which has seen a -38% decrease in ADR for September 5-12, compared to the same time period last year.

Weekly Occ (%) by Class – Sep 5, 2020 to Sep 12, 2020



ADR (\$) by Class – Sep 5, 2020 to Sep 12, 2020



Source: [2020 STR, STR Global Ltd](#), provided by BC Hotel Association

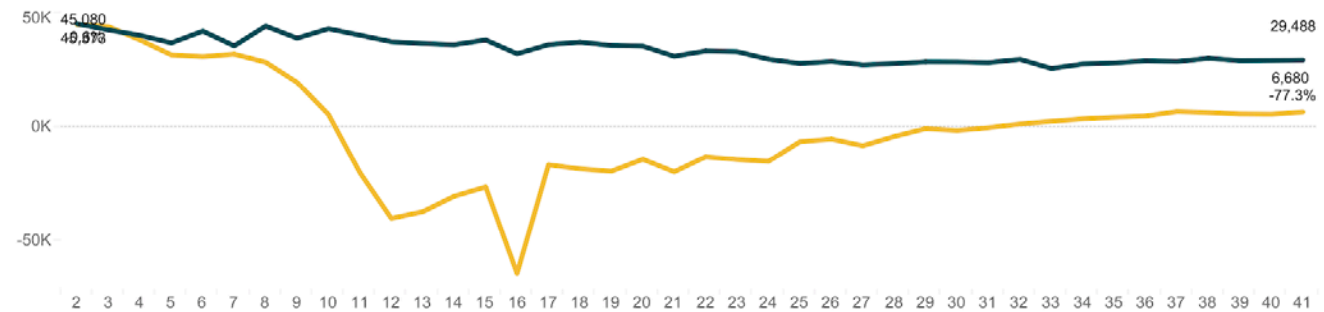


## BC sees the second-most airline bookings since the pandemic began

- ForwardKeys, a flight analysis company, has shown that during the week of October 7, 2020, there were 6,680 airline bookings made to BC. While this is a 77% decrease from the same time period last year, it continues a positive trend of growth and is the second highest number of bookings since the pandemic began.
- Arrivals to BC for the month of October have seen a year-over-year difference of -88%. For each month between April and September, arrivals to BC saw an average year-over-year difference of over -91%.
- These insights from ForwardKeys and more can be found in the Signals & Sentiment dashboard located on the Destination BC COVID-19 Hub, under the [Destination BC Response Signals & Sentiment Dashboard](#) tab.

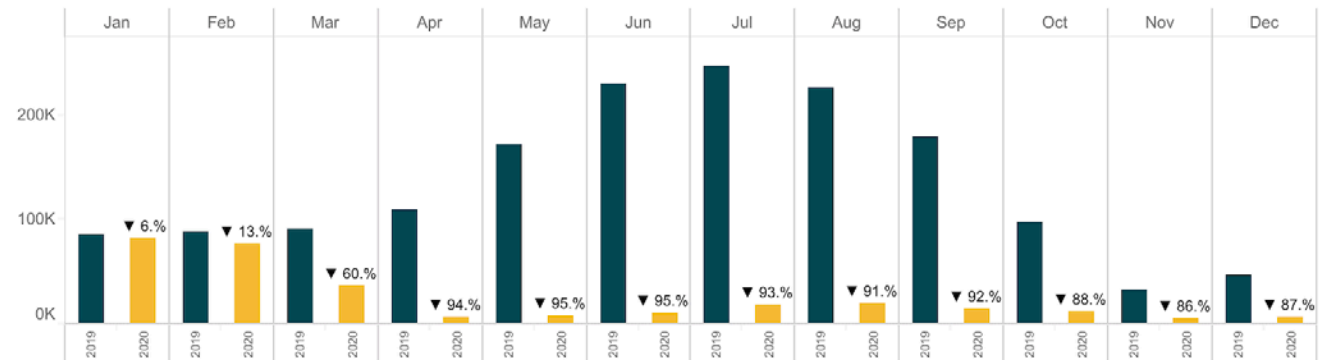
Airline Bookings Made to BC by Week

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

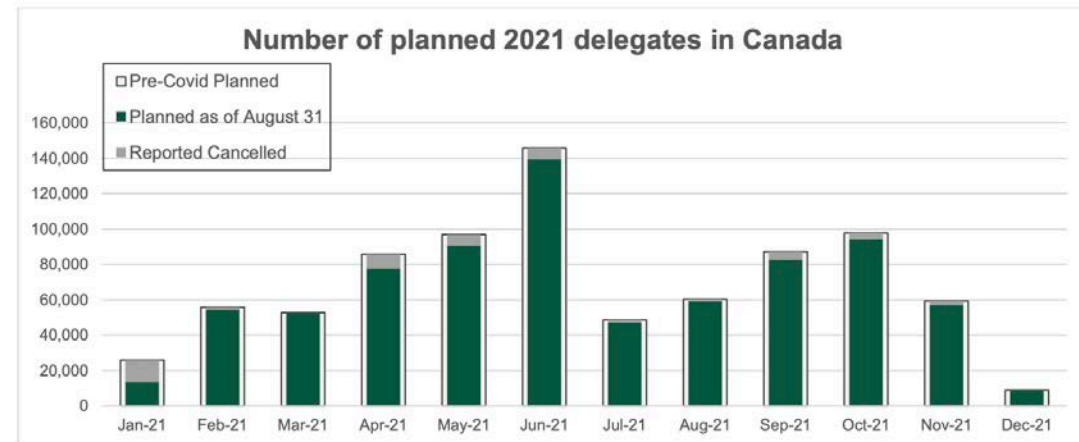
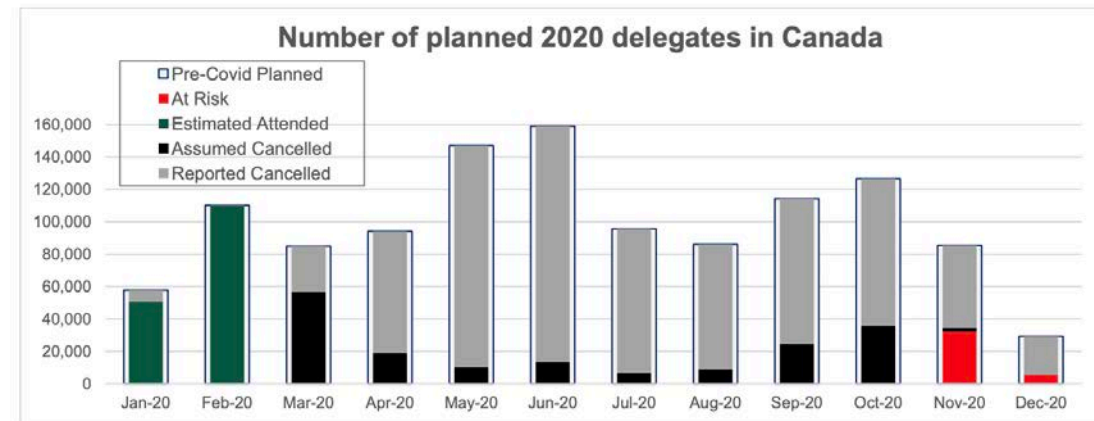


Source: [Signals and Sentiments Dashboard, Destination BC](#)



## *Q4 Business Events in Canada are at high-risk of being cancelled*

- Destination Canada has reported that during the peak months for business events travel in Canada (April – October) all business events were cancelled as a result of COVID-19.
- The remaining domestic conferences for Q4 are now at high risk of being cancelled.
- Some events throughout 2021 are at risk of being cancelled as well.



Source: [COVID-19 Impact and Recovery Report: Business Events, Destination Canada – October 2020](#)



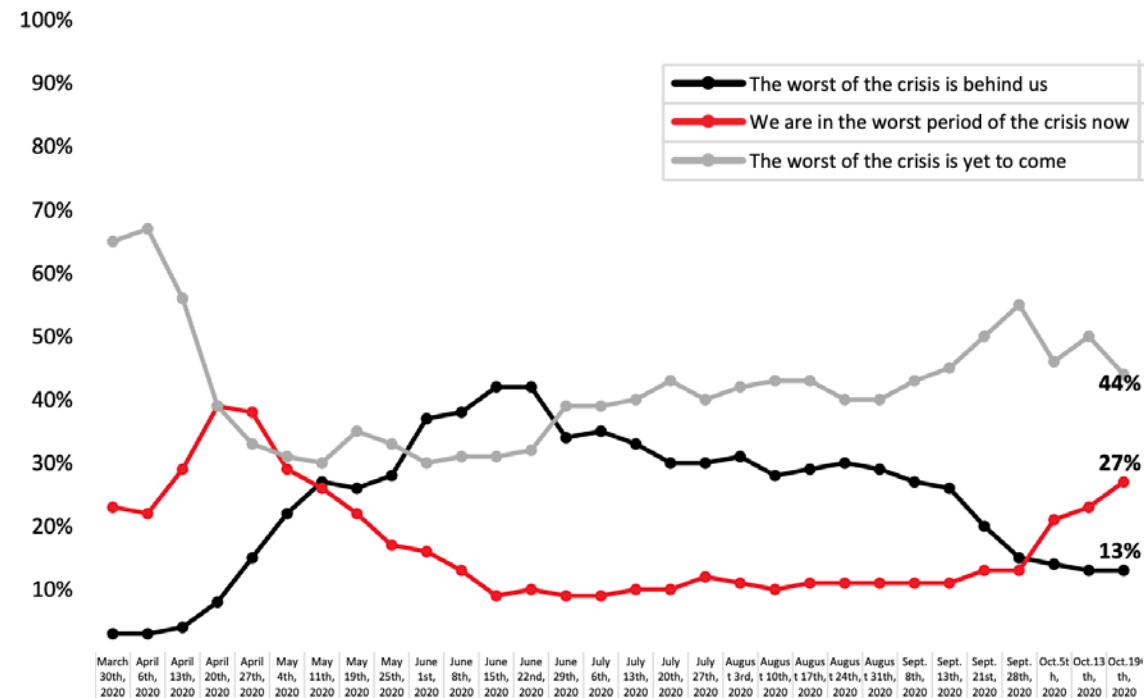


## 27% of Canadians believe we are currently in the worst period of the COVID-19 crisis

- According to Leger's Weekly Survey, 27% of Canadians believe we are currently in the worst period of the COVID-19 crisis, the highest percentage since May 2020, and up from 23% for the week of October 13.
- In the same survey, 64% of BC residents stated they are somewhat or very afraid of contracting COVID-19, not significantly higher than the national average of 61%.
- While Americans and Canadians have similar levels of fear overall towards the virus (62% and 61%, respectively), Americans are more optimistic that the worst of the crisis is behind them (22% compared to 13% for Canadians), and are more likely to rank their mental health since the crisis began as excellent or very good (49% compared to 36% for Canadians).

CTC20: What statement best describes your personal opinion of the COVID-19 crisis for Canada ?

Base: All respondents

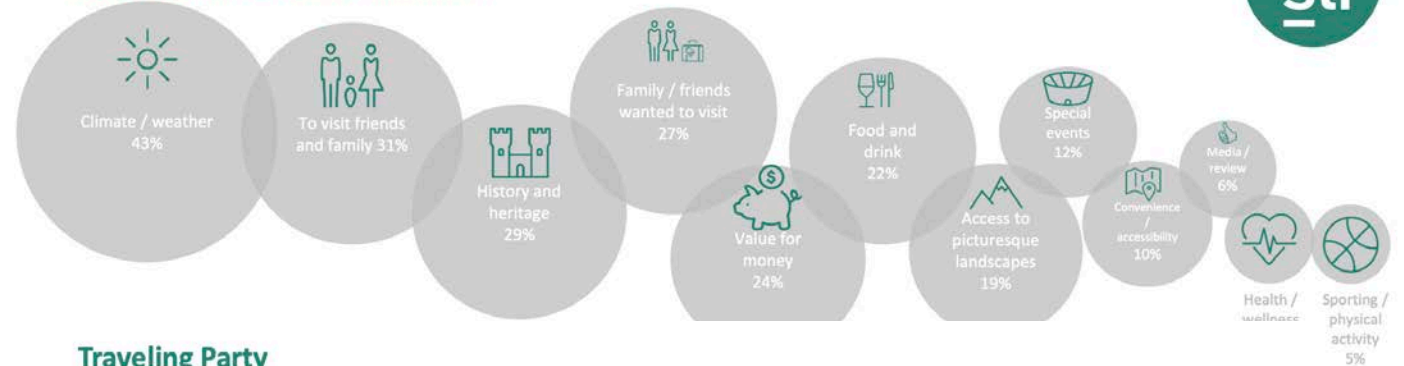


# *Good weather / climate is the top reason Canadians travel internationally*

- According to STR, amongst Canadians who travelled internationally in the last 12 months, the top motivator for their travel was climate / weather at 43%, followed by visiting friends / family at 31%, and history / heritage at 29%.
- Amongst Canadians who travelled internationally in the last 12 months, 65% travelled with a spouse / partner, compared to 15% who travelled solo, and 14% who travelled with a child under 16.
- Compared to other countries surveyed (UK, Australia, United States), Canadians are more likely to use a travel agent to book accommodation (53%), and less likely to book directly on the accommodation providers website for both international and domestic travel (36% and 32%, respectively).

## Travel Behaviors

### Motivations to Visit Destination



### Traveling Party



Source: [Consumer Travel Insights: Market Summary, STR – October 2020](#)

# *Most Americans have a ready-to-travel state of mind*

- A survey by Destination Analysts, a tourism research organization, shows that between October 16-18, 56% of Americans considered themselves to be in a 'ready-to-travel' state of mind, down slightly from 58% between October 9-11.
- This same survey showed that as of October 18, 28.2% of Americans intend to travel during the holiday season, down nearly -25% from the 2019 holiday season.

## AMERICANS' TRAVEL STATE-OF-MIND

MAY 29 – OCTOBER 18



QUESTION: WHEN IT COMES TO GETTING BACK OUT AND TRAVELING AGAIN, WHICH BEST DESCRIBES YOUR CURRENT STATE OF MIND? (SELECT ONE)

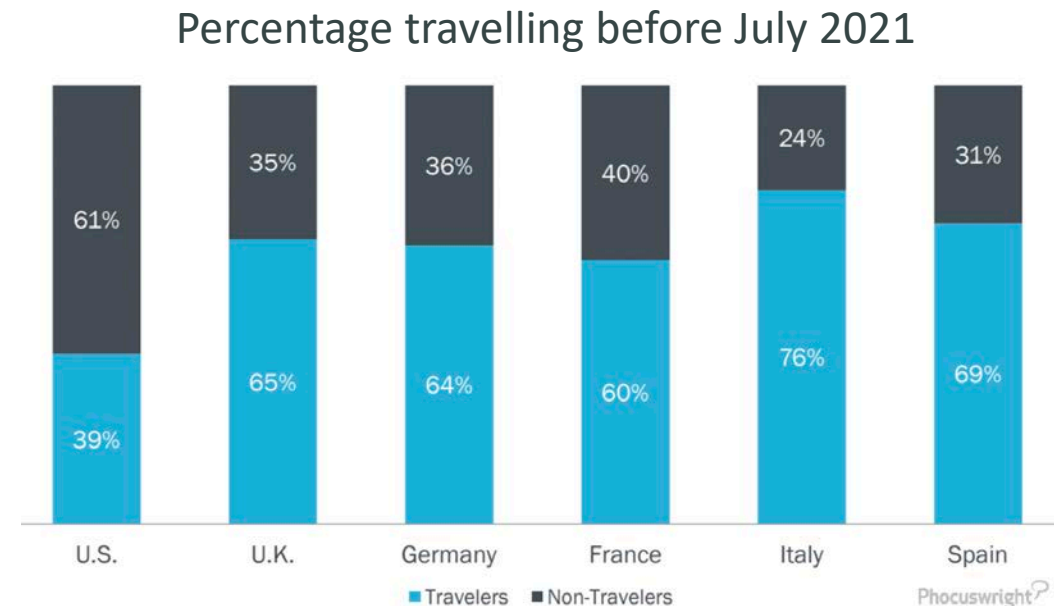
Source: [Update on American Travel in the Period of Coronavirus, Destination Analysts – October 19](#)





## *Americans less likely to travel before July 2021 than Europeans*

- While Americans are ‘ready-to-travel’ as reported by Destination Analysts, American leisure travellers are significantly less likely to travel before July 21, 2021 compared to Europeans, according to a survey by Phocuswright.
- For those not travelling, a top reason for Americans is because of COVID-19 travel restrictions (29%), followed by concerns for personal safety (26%), and health considerations (22%).
- Travellers from the United States and Europe usually focus on reported decreases in infection rates over the availability of a vaccine when considering travel, whereas non-travellers rate the availability of a vaccine to be critical when to considering to travel.



Source: [Phocuswright, Why Some Consumers Won't Travel, October 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](#).
- 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.
- PhocusWire has a live roundup of [coronavirus-related tourism news](#).
- Skift has 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.





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

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