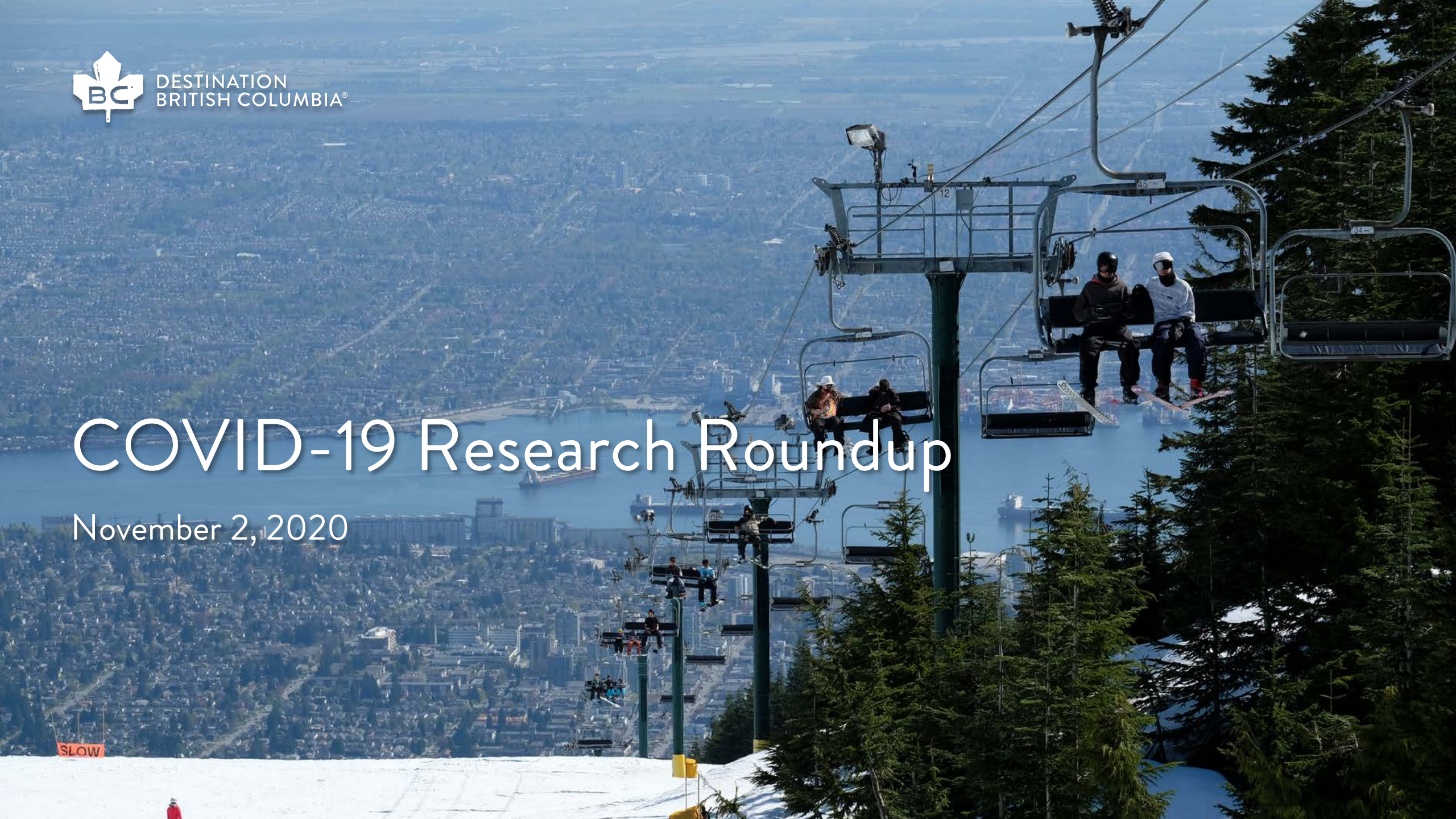




DESTINATION
BRITISH COLUMBIA®

COVID-19 Research Roundup

November 2, 2020



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.





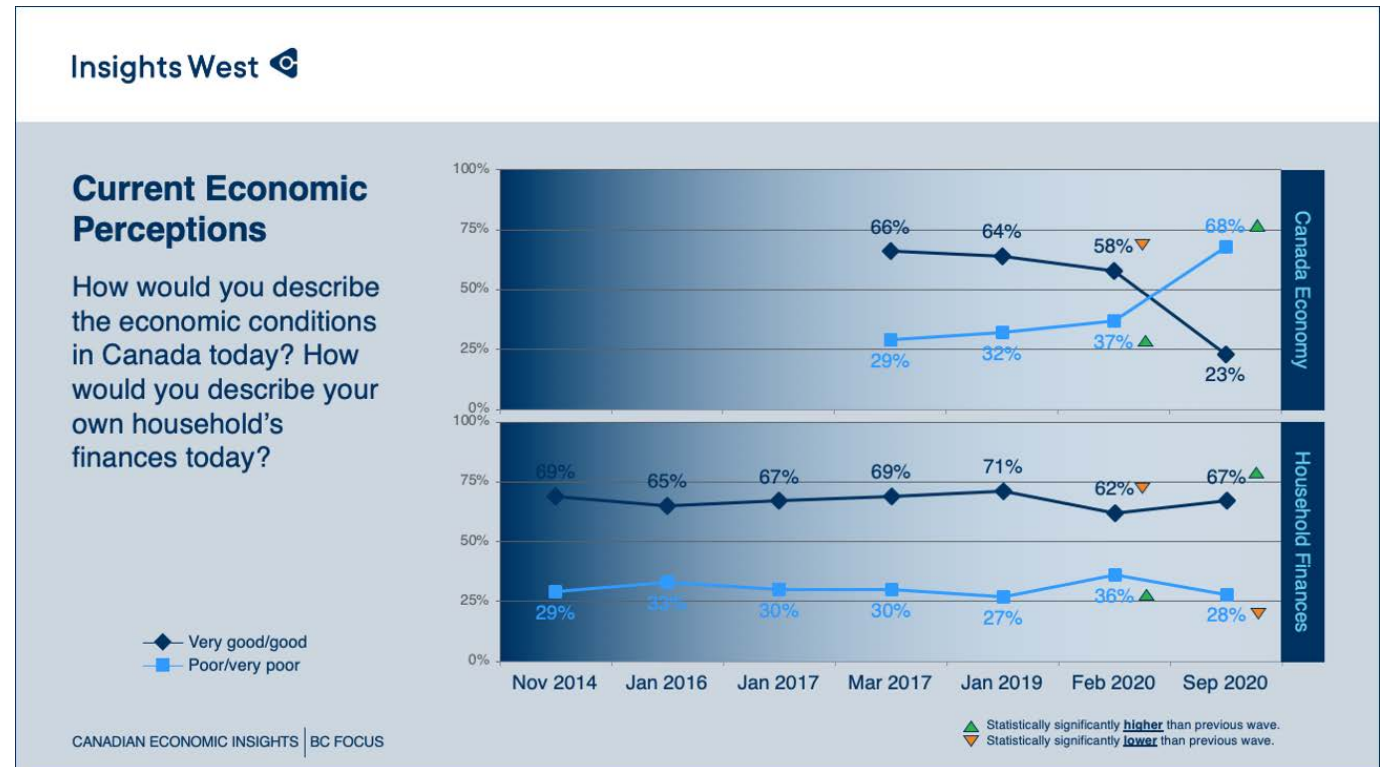
Destination BC is rounding up relevant research and articles each week related to the travel and tourism industry and COVID-19.

Last week in brief:

- BC residents' personal finances in better shape than pre-pandemic
- Feelings of safety with travel to nearby communities decrease significantly
- Comfort with tourism activities decreases for almost all tracked
- Movement across BC was down -9.8% compared to previous week
- Movement in BC is down for the 7th consecutive week compared to 2019
- Weekly hotel occupancy for BC increases +1.1 points from previous week
- BC Ferries passenger volume is down -38.8% across the province compared to 2019 year-to-date
- Airline bookings are down -82% for the week of October 21 compared to same period in 2019
- International visitor arrivals down -98.2% for BC
- Global International tourism down -70% due to COVID concerns and travel restrictions
- Large accommodations are considered the riskiest
- Almost a quarter of Canadian accommodation & food service businesses have closed
- Canada's tourism industry dropped -60% in paid employment during May
- Only 28% of Americans plan to travel this holiday season
- Tourism and COVID-19 dashboard and reporting resources available

BC residents' personal finances in better shape than pre-pandemic

- A new study by Insights West shows that over two-thirds of BC residents indicate that their personal financial situation is good or very good. This is 5% higher than before the pandemic.
- Over three-quarters of British Columbians believe Canada is in a recession that most feel will last until the end of 2021 or later.

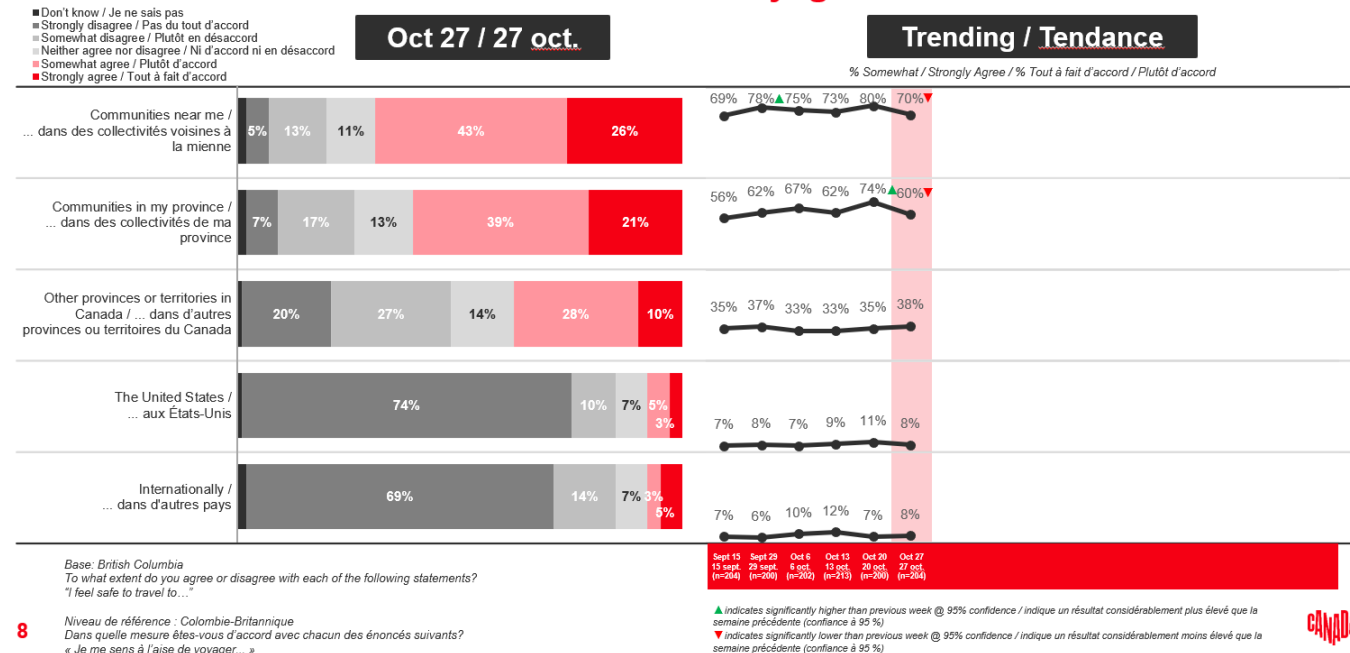


Feelings of safety with travel to nearby communities decrease significantly

- In Destination Canada's Wave 22 (October 27) report, feelings of safety towards travel have decreased significantly for travel to nearby communities and to other parts of the province compared to the previous wave.
- However, this is after a significant increase was seen in the previous wave for feelings of safety towards travel to other parts of the province.
- Compared to the previous wave, sentiment of BC residents towards visitors from other parts of the province has also decreased significantly.

British Columbia / Colombie-Britannique

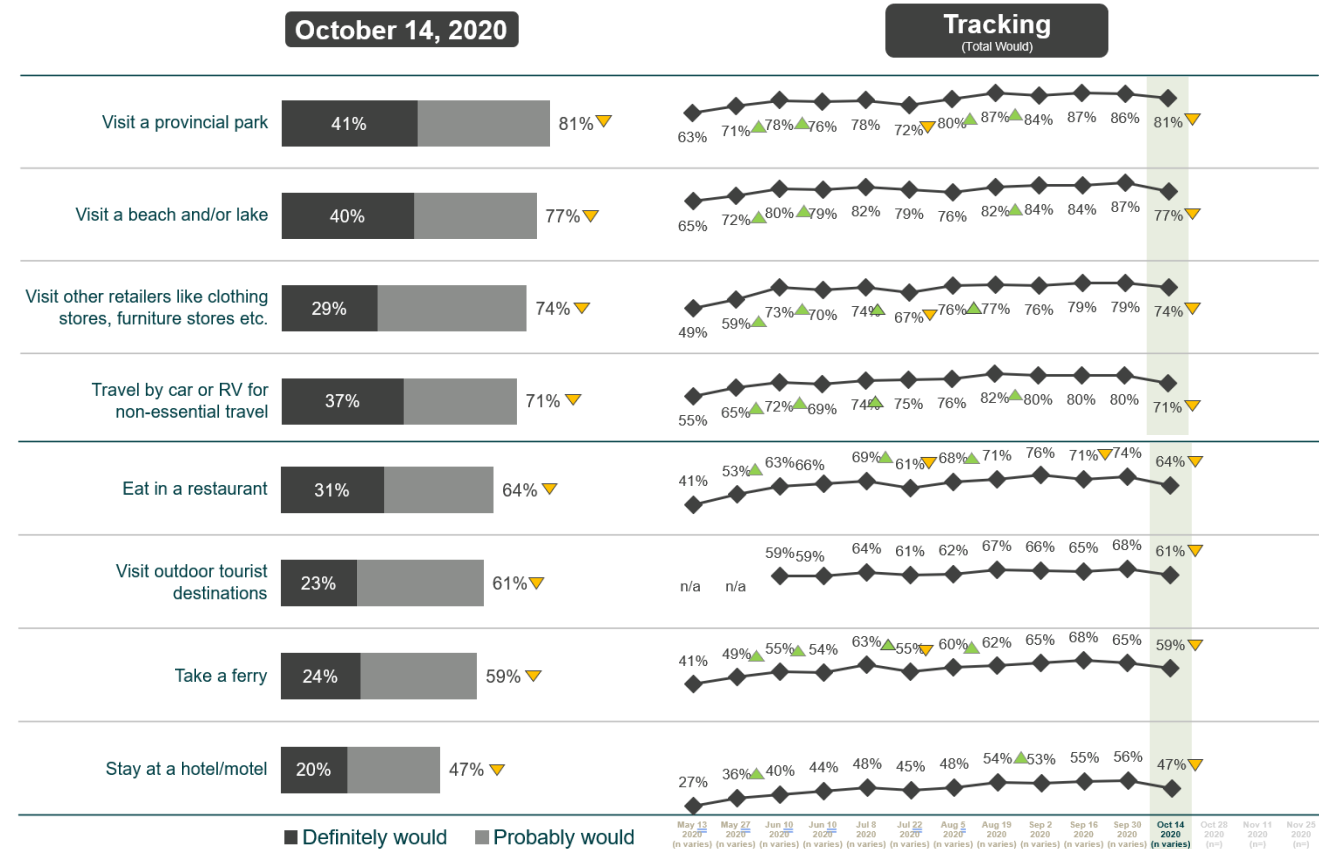
I feel safe to travel / Je me sens à l'aise de voyager



Source: [Destination Canada's Weekly Resident Sentiment, Wave 22, Leger, October 27, 2020](#)

Comfort with tourism activities decreases for almost all tracked

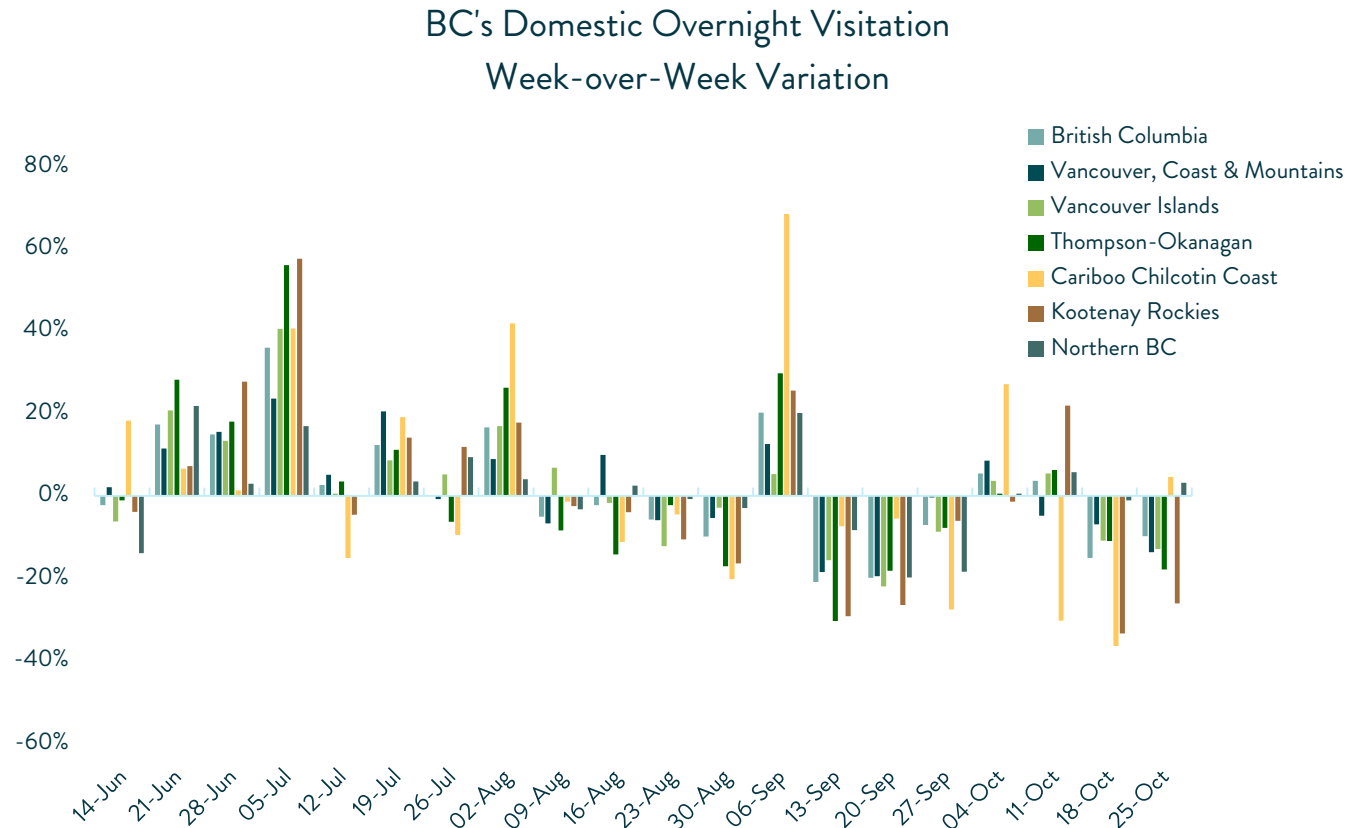
- Wave 12 (October 14) of Destination BC's BC Residents' Public Perceptions survey shows that levels of comfort to participate in all tourism-related activities has decreased across the board.
- Comfort travelling by plane (19%) or taking a cruise (13%) are still low, and comfort travelling by car/RV for non-essential travel has decreased to 71% from 80%, compared to the previous wave – the first decline since tracking began.



Source: [Destination BC's BC Residents' Public Perceptions: COVID-19 Travel and Tourism Wave 12, Insights West, October 14, 2020](#)

Movement across BC was down -9.8% compared to previous week

- According to Environics Analytics Weekly COVID Tracker Report, during the week ending October 25, BC experienced a week-over-week decrease in domestic overnight visitation (-9.8%) from the previous week.
- Nearly all regions across the province saw week-over-week decreases in movement compared to the previous week:
 - Kootenay Rockies (-26.1%)
 - Thompson Okanagan (-17.9%)
 - Vancouver, Coast & Mountains (-13.7%)
 - Vancouver Island (-12.9%)
- The Cariboo Chilcotin Coast (+4.6%) and Northern BC (+3.2%) saw week-over-week increases in movement compared to the previous week.

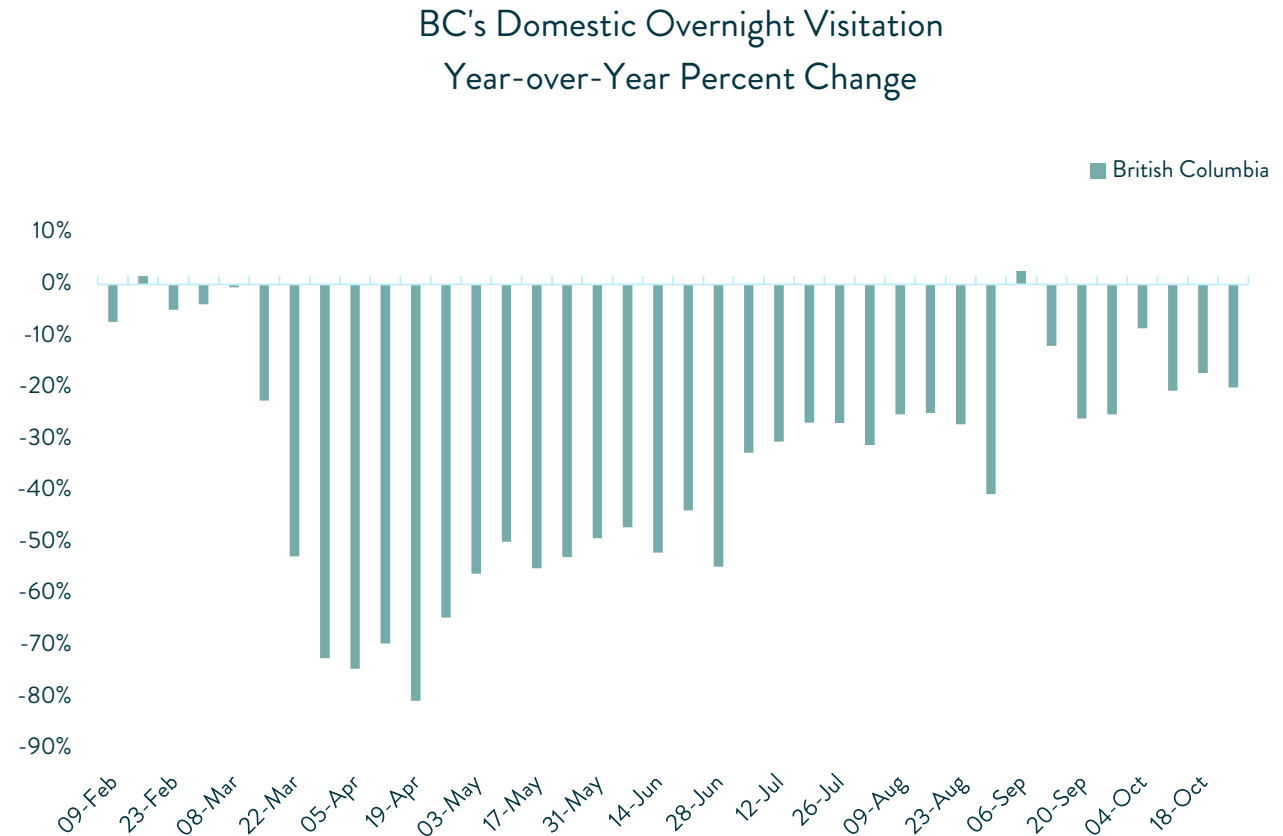


Source: [Environics Analytics Weekly COVID Tracker Report, October 25, 2020](#)



Movement in BC is down for the 7th consecutive week compared to 2019

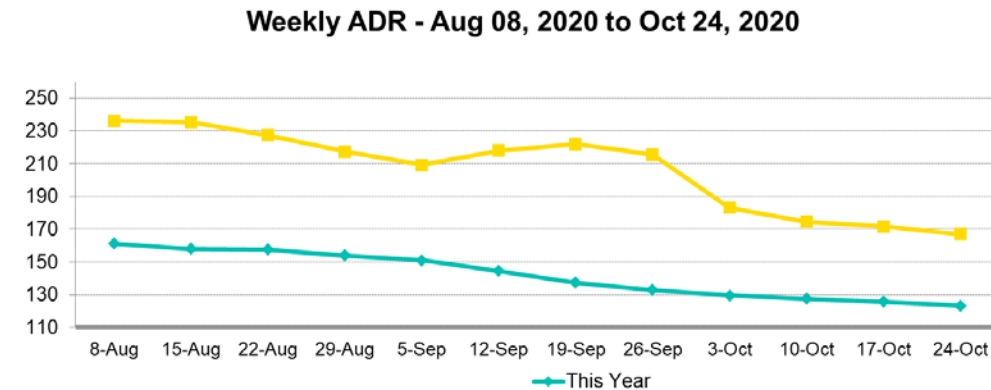
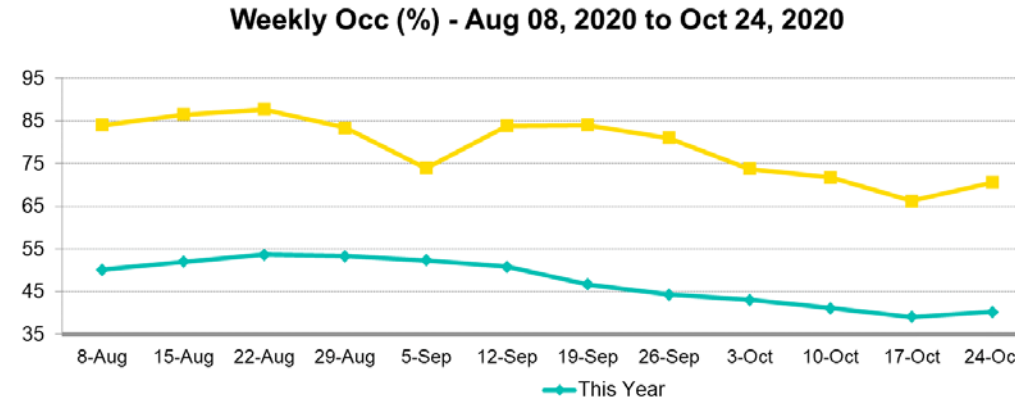
- Environics Analytics also reports year-over-year analysis in the Weekly COVID Tracker Report.
- For the sixth consecutive week, BC's overnight domestic visitation was down (-20.0%) for the week ending October 25 compared to the same week in 2019.
- A year-over-year decrease in visitation was seen across all tourism regions:
 - Vancouver, Coast and Mountains (-34.4%)
 - Vancouver Island (-24.9%)
 - Cariboo Chilcotin Coast (-16.1%)
 - Kootenay Rockies (-15.4%)
 - Thompson Okanagan (-3.2%)
 - Northern BC (-2.4%)



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

Weekly hotel occupancy for BC increases +1.1 points from previous week

- STR, an agency which captures BC hotel performance, shows the average weekly occupancy for BC was 40.2% for the week of October 18-24. This represents an increase of +1.1 points from the previous week and a decrease of -30.4 points compared to the previous year.
- BC's average daily rate (ADR) was \$123.35 for the week of October 18-24. This represents a -2.0% decrease from the previous week, and a decrease of -26.1% compared to the same period in 2019.



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



BC Ferries passenger volume is down -38.8% across the province compared to 2019 year-to-date

- BC Ferries passenger volume across the province for January to August 2020 was down -38.8% compared to the same period in 2019.
- Since May, the gap in passenger volume between 2020 and 2019 has reduced in size each month. For example, in May, BC Ferries passenger volume was down -65.1% compared to May 2019. In June, it was down -47.1%, down -34.1% in July, and down -29.0% in August.

BC Ferries Passenger Volume By Regional Route

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	YTD
Victoria, Nanaimo, Vancouver	534,226 -11.0%	628,797 11.0%	438,165 -48.6%	126,772 -85.4%	252,345 -75.3%	485,047 -57.3%	847,394 -43.7%	1,041,009 -36.5%	4,353,755 -46.8%
Gulf Islands	300,938 -9.9%	335,323 23.4%	274,387 -32.2%	145,918 -65.1%	230,657 -53.6%	353,862 -32.6%	513,972 -20.2%	570,651 -17.1%	2,725,708 -28.0%
Sunshine Coast	281,079 -11.5%	311,329 18.0%	238,514 -36.7%	120,524 -68.8%	205,286 -54.4%	294,416 -37.6%	446,970 -22.8%	506,932 -20.1%	2,405,050 -30.9%
Inside Passage, Haida Gwaii	9,858 7.1%	10,475 8.0%	8,605 -32.4%	3,474 -73.0%	4,908 -70.6%	7,069 -69.1%	9,207 -71.0%	8,570 -74.8%	62,166 -58.5%
Total Passengers	1,126,101 -10.7%	1,285,924 15.7%	959,671 -41.7%	396,688 -76.5%	693,196 -65.1%	1,140,394 -47.1%	1,817,543 -34.1%	2,127,162 -29.0%	9,546,679 -38.8%



Source: [Tourism Indicators, Destination BC – July 2020](#)

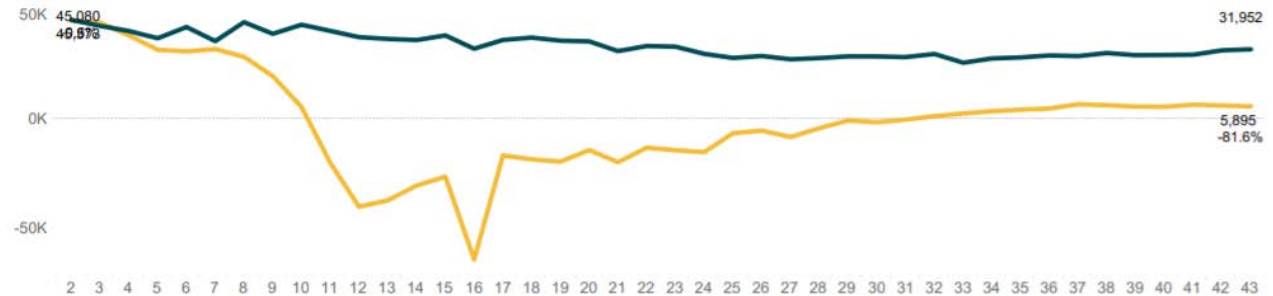
Airline bookings are down -82% for the week of October 21 compared to same period in 2019

- ForwardKeys, a flight analysis company, has shown that during the week of October 21, 2020, there were 5,895 airline bookings made to BC. This is a decrease of -82% from the same time period last year.
- Arrivals to BC for the month of October have seen a year-over-year decrease of -87%.
- 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.

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



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](#)



International visitor arrivals down -98.2% for BC

- Destination BC's overnight visitor arrivals for August 2020 show a -98.2% decrease in total international arrivals year-over-year.
- USA overnight visitor arrivals are down -98.6% for August 2020 compared to August 2019.
- BC saw the greatest decrease in overnight visitor arrivals from Australia (-99.6%), followed by Netherlands (-99.3%).

	August 2020				Year-to-Date			
	BC	% change*	Canada	% change*	BC	% change*	Canada	% change*
Total U.S.A.	27,895	-96.9%	120,824	-96.6%	916,061	-80.0%	3,552,736	-79.9%
U.S.A. Overnight	9,169	-98.6%	44,976	-98.1%	507,737	-83.4%	1,772,788	-83.5%
U.S.A. Same Day	18,726	-92.7%	75,848	-93.8%	408,324	-73.3%	1,779,948	-74.2%
Total Asia/Pacific	6,165	-96.4%	14,339	-95.8%	184,445	-81.2%	345,918	-81.7%
Japan	503	-97.7%	541	-98.7%	19,428	-80.3%	30,144	-82.5%
Taiwan	196	-97.8%	377	-96.9%	14,523	-77.3%	18,439	-78.6%
Hong Kong	1,054	-90.9%	1,604	-91.9%	19,104	-74.6%	29,340	-76.4%
Australia	103	-99.6%	287	-99.4%	36,564	-79.0%	48,982	-81.0%
South Korea	687	-95.2%	1,234	-96.0%	16,886	-80.0%	31,654	-83.0%
China	1,280	-97.3%	2,259	-97.9%	43,678	-82.6%	92,808	-82.4%
New Zealand	46	-99.2%	87	-99.0%	7,712	-78.3%	9,294	-81.4%
India	469	-96.8%	4,467	-89.4%	10,320	-89.3%	43,420	-83.3%
Total Europe	1,452	-98.7%	11,517	-97.8%	54,004	-88.6%	349,253	-84.4%
United Kingdom	448	-98.8%	2,643	-98.1%	22,882	-87.1%	90,566	-85.7%
Germany	198	-99.2%	1,242	-98.3%	8,133	-91.2%	36,857	-87.8%
Netherlands	52	-99.3%	632	-96.9%	2,290	-93.3%	16,316	-83.8%
Austria	22	-98.9%	119	-98.3%	881	-88.8%	4,803	-84.0%
Switzerland	50	-99.1%	380	-97.8%	1,904	-91.7%	12,721	-86.2%
France	247	-97.3%	2,830	-97.6%	3,672	-88.4%	88,837	-81.1%
Italy	66	-98.6%	363	-99.0%	1,597	-88.7%	11,035	-89.7%
Brazil	34	-99.2%	177	-99.1%	5,285	-80.9%	24,874	-80.7%
Mexico	452	-97.5%	3,441	-93.7%	31,816	-73.0%	94,365	-73.4%
Total International** (Includes USA Overnight)	17,519	-98.2%	82,816	-97.6%	793,203	-83.2%	2,719,304	-83.0%

*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.

Source: [August International Visitor Arrivals, Destination BC, 2020](#)



Global International tourism down -70% due to COVID concerns and travel restrictions

- The latest data from the UNWTO shows that international travel is down -70% for the first eight months of 2020.
- This represents 700 million fewer arrivals compared to the same period in 2019, and a loss of USD \$730 billion in export revenues from international tourism.
- This financial loss is over eight times the loss of the 2009 global economic and financial crisis.

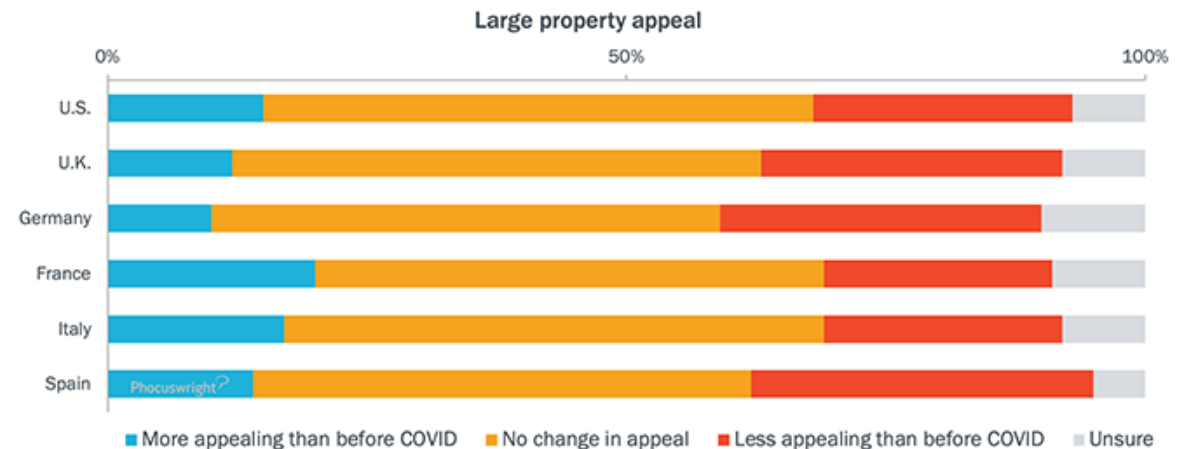


Source: [UNWTO, October 27, 2020](#)

Large accommodations are considered the riskiest

- A study by Phocuswright shows that large accommodation have become less appealing during COVID-19 due to concerns about infection risks.
- In addition, travel that minimizes encounters with others is popular. For example, private home rentals, self-guided tours and road trips (with own or borrowed cars) have seen a surge in appeal.

Properties that are too large raise concerns about infection risks through increased interactions with others.



Question: Following is a list of lodging options and amenities that may be available for your leisure trip(s). For each one, please indicate whether the COVID-19 outbreak has made this option more appealing to you, less appealing to you, or has not changed its appeal to you at all.
Base: U.S. (N=811); U.K. (N=811); Germany (N=803); France (N=801); Italy (N=809); Spain (N=805)
Source: Phocuswright's COVID-19: The Path to Recovery

Phocuswright
Powering great decisions.



Source: [Phocuswright, COVID-19: Perceptions of Transport, Lodging, Cruise and Activities, October 2020](#)

Almost a quarter of Canadian accommodation & food service businesses have closed

- Findings by Destination Canada show that Accommodation & Food Services and Arts, Entertainment & Recreation have both experienced an over -24% loss in active businesses between January and June in 2020.
- Domestic airlines lost -95% of revenues in Q2 of 2020, while the accommodation sector lost -74%.

Accommodation & Food Services

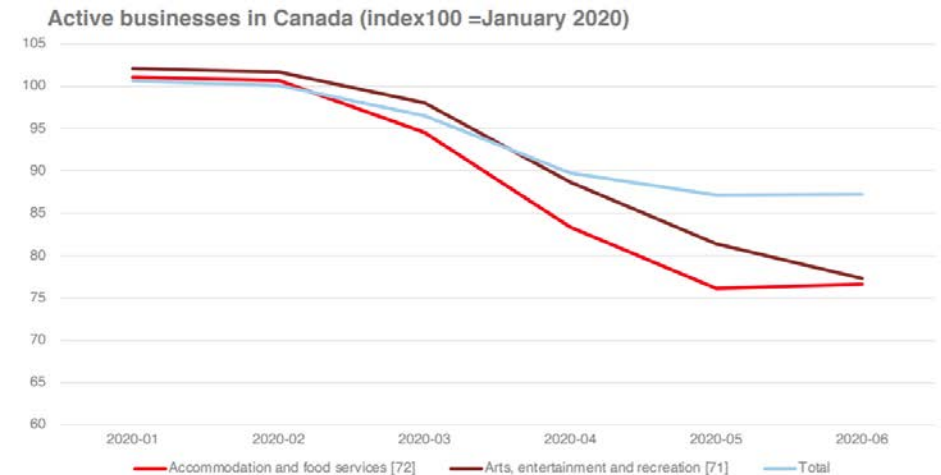
Loss of 24.3%

Change in active businesses Jan 2020 to June 2020

Arts, Entertainment & Recreation

Loss of 24.2%

Change in active businesses since Jan 2020 to June 2020

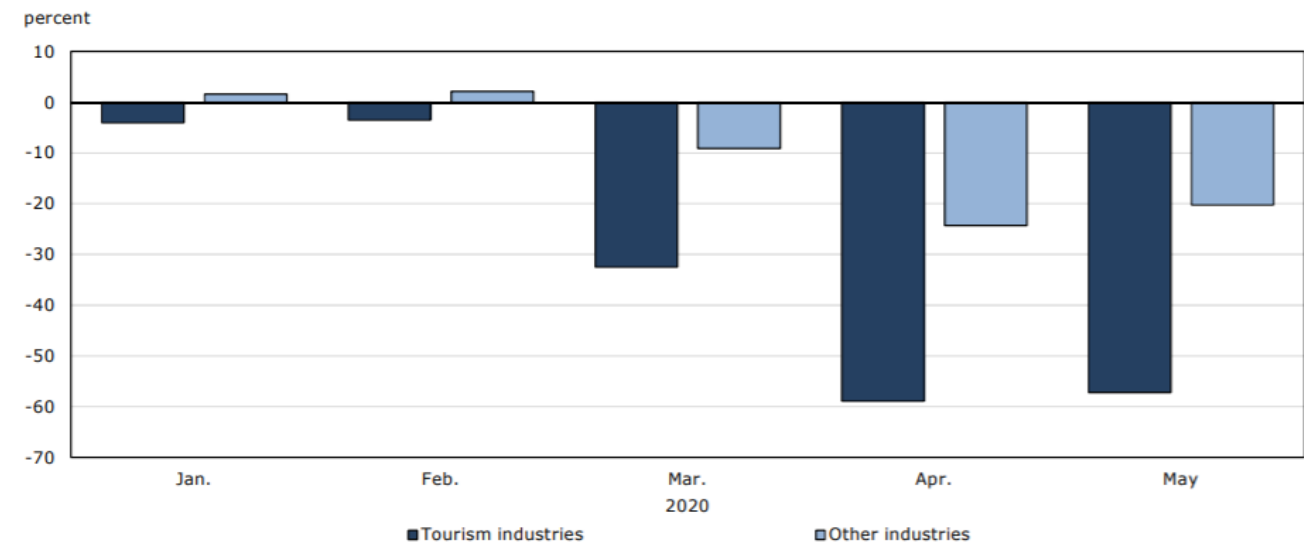


Source: [State of the Industry, Destination Canada, October 2020](#)

Canada's tourism industry dropped -60% in paid employment during May

- According to Statistics Canada, paid employment in the tourism industry in May 2020 was down almost -60% from 2019. For reference, a decline of approximately -25% of paid employment was seen for other industries.
- In Statistics Canada's optimistic scenario, the tourism industry was forecasted to lose \$16.3 billion in GDP.
- The number of jobs impacted by travel restrictions is forecasted to range from 383,000 to 549,000.

Change in paid employment in the tourism industry from 2019



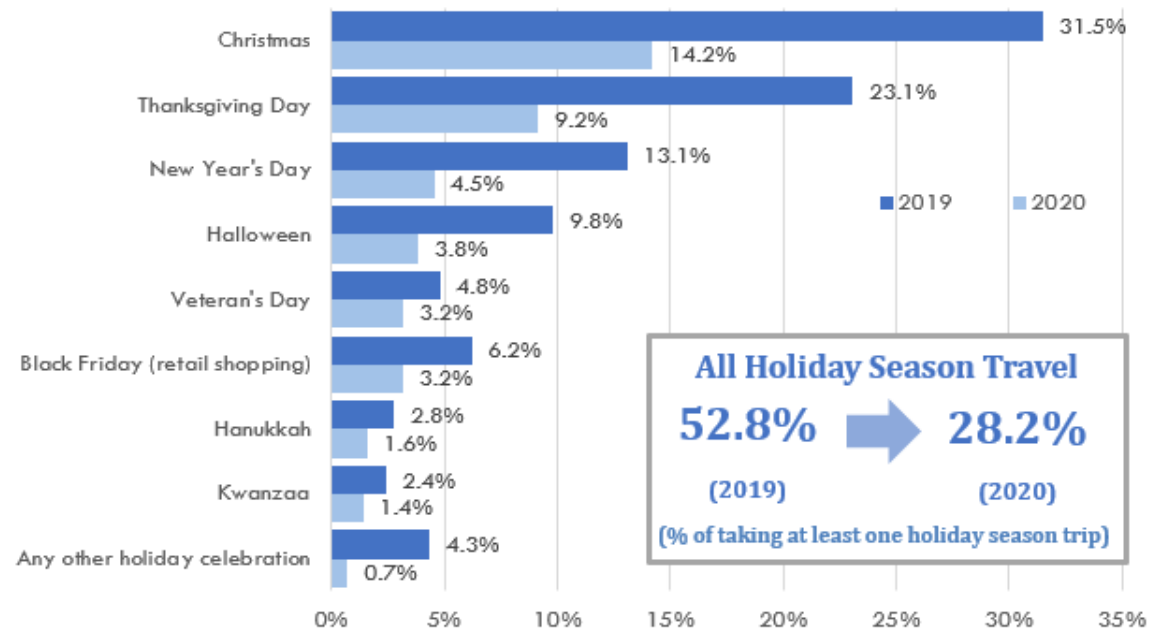
Source: Statistics Canada, Labour Force Survey, author's calculations.



Source: [Statistics Canada Economic Insights, October 23, 2020](#)

Only 28% of Americans plan to travel this holiday season

- A survey by Destination Analysts, a tourism research organization, shows that only 28.2% of Americans plan to travel this holiday season compared to over 50% in 2019.
- 51.3% said they will not undergo testing for COVID-19 before their holiday travels, while a third said they will (34.8%).



Source: [The 2020 Holiday Travel Season, Destination Analysts, October 27, 2020](#)

Tourism and COVID-19 dashboard and reporting resources

- Destination BC has 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 a [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 compiles 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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