

COVID-19 Research Roundup

November 19, 2020

Farwell Canyon, 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 November 18, 2020, Canadian and US officials agreed to extend the closure of the border between the two countries to non-essential travel until at least December 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.

To get COVID-19 transmission under control right now, the Province is urging all British Columbians to press pause on non-essential travel and stay in their local community. This includes a temporary pause on inter-provincial travel and travel throughout British Columbia. Many insights noted in this Research Roundup were gathered prior to this announcement by BC's Provincial Health Officer, Dr Bonnie Henry, on November 19.





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:

- Pfizer COVID-19 vaccine 95% effective
- BC residents less happy with promoting their communities
- Comfort levels for some tourism-related activities increase
- Half of Albertans feel safe travelling to other provinces
- BC sees weekly increase in domestic overnight visitation compared to previous week
- 9th consecutive decrease in weekly movement in BC compared to same period in 2019
- Hotel occupancy and ADR increases slightly from previous week, but down from previous year
- Hotel stays increase in the US, but recovery is a slow climb
- Canadian tourism sector loses 70,400 jobs, while BC tourism sector employment up +0.3% between September and October
- Indigenous tourism opportunity for market share gains due to COVID-19
- Insights West releases top 10 insights for BC brands and marketers
- Almost 60% of American travellers are ready to travel
- Global air traffic recovers slightly in September compared to August
- Tourism and COVID-19 dashboard and reporting resources available

Pfizer COVID-19 vaccine is 95% effective

- The Pfizer COVID-19 vaccine, reportedly 95% effective, is one of seven vaccines pre-ordered by the Canadian government.
- Prime Minister Trudeau says he hopes a vaccine will be available “early next year”, with some experts cautioning against expecting approvals before December.
- According to Skift and Event Manager Blog, the impact of the announcement has resulted in market gains for events companies and airlines. For example:
 - Eventbrite was up +27%
 - Viad, which owns GES, a global full-service provider for live events, was up +7%
 - Informa was up +21%
 - European airlines were up +40%
 - United airline was up +20%
 - American airline was up +20%
 - Air Canada was up +31%



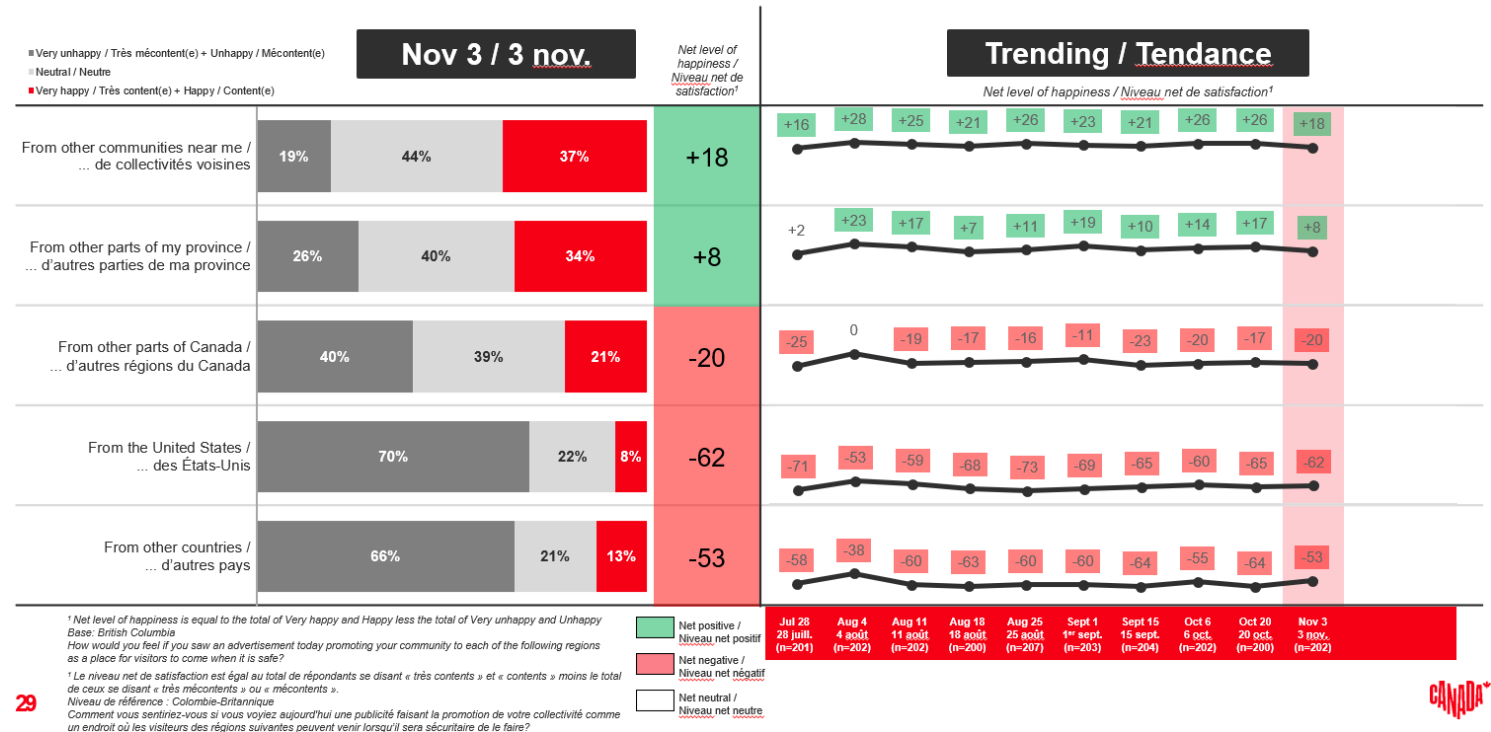
Source: [CBC, November 18, 2020](#)

Source: [Event Manager Blog, November 9, 2020](#)

BC residents less happy with promoting their communities

- In Destination Canada's Wave 23 (November 3) report, 37% of British Columbians said they would be very happy seeing an advertisement promoting their community to other communities nearby. This equates to a net level of happiness of +18, down from +26 in the prior wave.
- 34% said the same for seeing an advertisement promoting their community to other parts of the province. This equates to a net level of happiness of +8, down from +17 in the prior wave.
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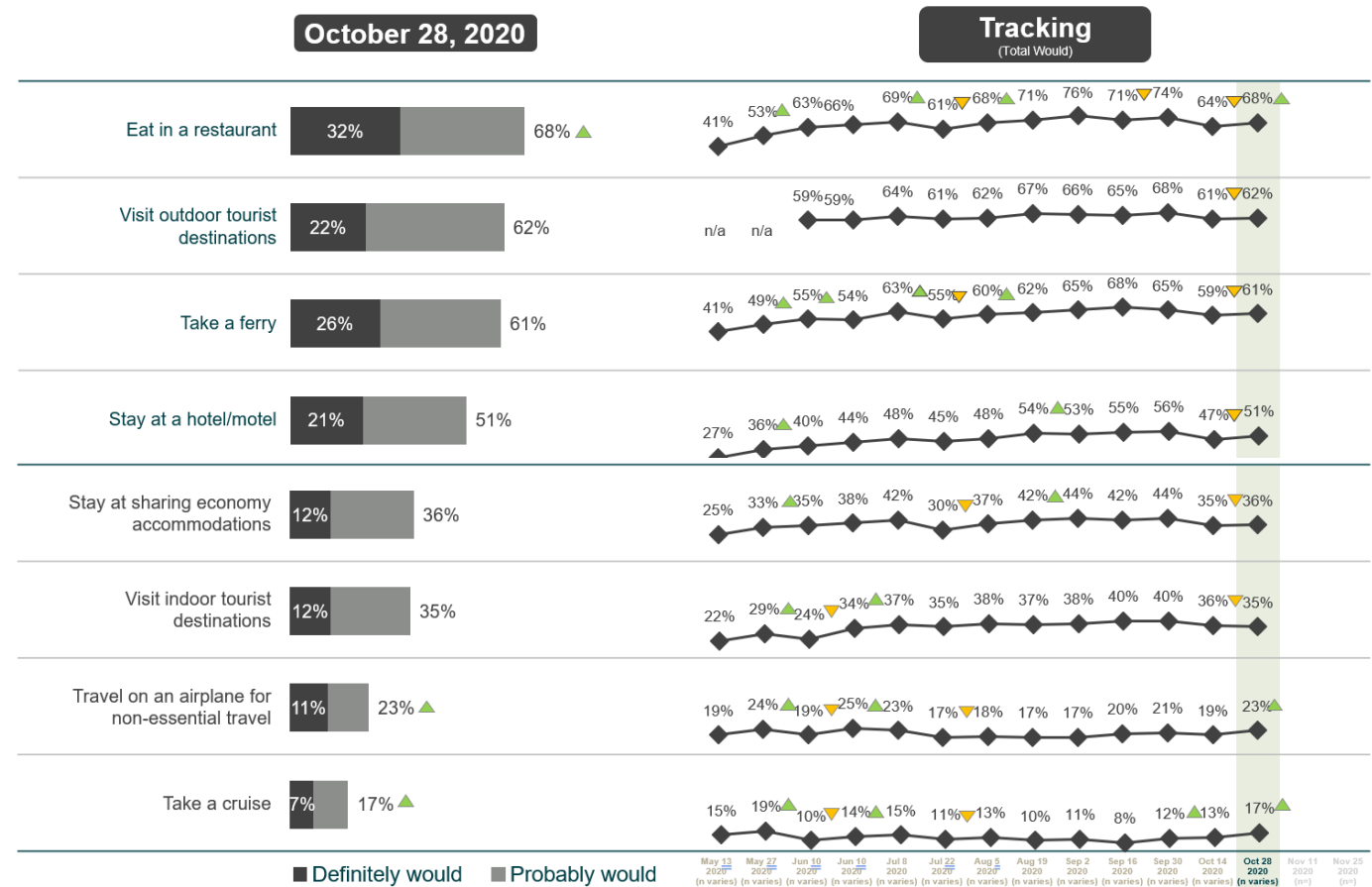
British Columbia / Colombie-Britannique



Source: [Destination Canada's Weekly Resident Sentiment, Wave 23, Leger, November 3, 2020](#)

Comfort levels for some tourism-related activities increase

- Wave 13 (October 28) of Destination BC's BC Residents' Public Perceptions survey shows that while BC residents' comfort with many tourism-related activities has stayed the same from the previous wave, some increases were seen, including eating in a restaurant, travelling on an airplane for non-essential travel, and taking a cruise (each up +4%)
- Activities considered the most comfortable include visiting a provincial park (80%), visiting a beach and/or lake (77%), and visiting other retailers, such as clothing and furniture stores (74%). The level of comfort in participating in these activities has not changed since dropping in the week of September 30.



Source: [Destination BC's BC Residents' Public Perceptions: COVID-19 Travel and Tourism Wave 13, Insights West, October 28, 2020](#)

Half of Albertans feel safe travelling to other provinces

- In Destination Canada's Wave 23 (November 3) report, feelings of safety towards travel have increased to 82% from 75% for Alberta residents when considering travelling to nearby communities, while dipping slightly to 49% from 51% when considering travelling to other provinces in Canada.
- Albertans' feelings of safety travelling to other provinces have trended down for the past two waves, though they are still up +6 points from a low of 43% in early October.

Alberta

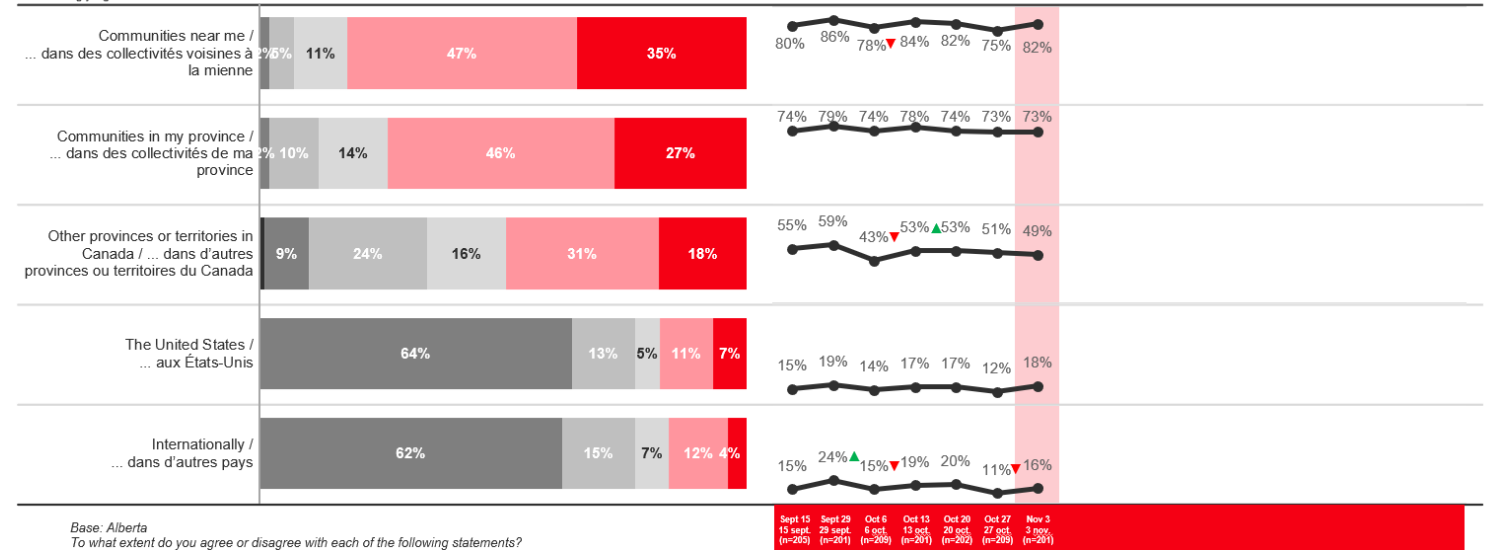
I feel safe to travel / Je me sens à l'aise de voyager

■ Don't know / Je ne sais pas
 ■ Strongly disagree / Pas du tout d'accord
 ■ Somewhat disagree / Plutôt en désaccord
 ■ Neither agree nor disagree / Ni d'accord ni en désaccord
 ■ Somewhat agree / Plutôt d'accord
 ■ Strongly agree / Tout à fait d'accord

Nov 3 / 3 nov.

Trending / Tendance

% Somewhat / Strongly Agree / % Tout à fait d'accord / Plutôt d'accord



Base: Alberta
 To what extent do you agree or disagree with each of the following statements?
 "I feel safe to travel to..."

10 Niveau de référence : Alberta
 Dans quelle mesure êtes-vous d'accord avec chacun des énoncés suivants?
 « Je me sens à l'aise de voyager... »

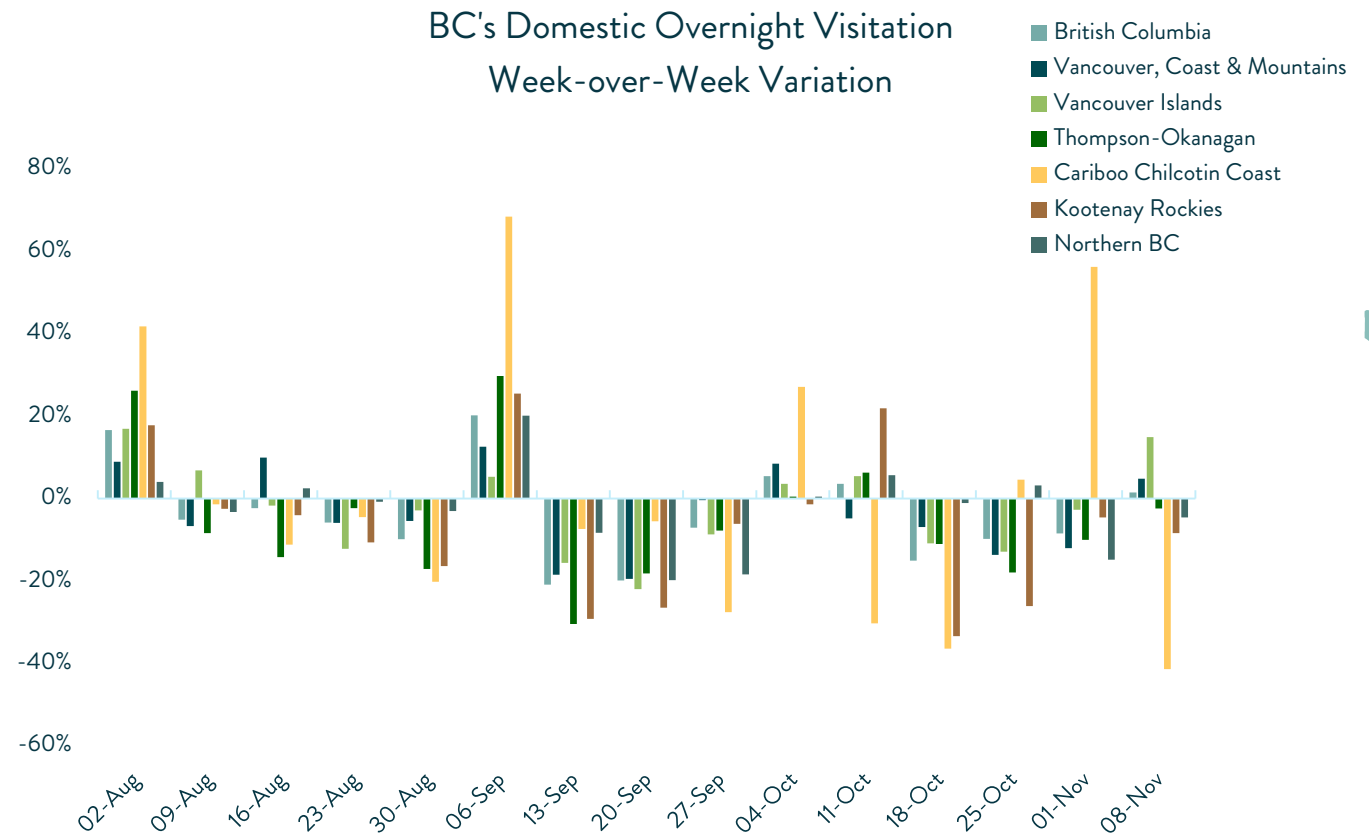
▲ Indicates significantly higher than previous week @ 95% confidence / indique un résultat considérablement plus élevé que la semaine précédente (confiance à 95 %)
 ▼ Indicates significantly lower than previous week @ 95% confidence / indique un résultat considérablement moins élevé que la semaine précédente (confiance à 95 %)



Source: [Destination Canada's Weekly Resident Sentiment, Wave 23, Leger, November 3, 2020](#)

BC sees weekly increase in domestic overnight visitation compared to previous week

- According to Environics Analytics Weekly COVID Tracker Report, during the week ending November 8, BC experienced the first week-over-week increase (+1.5%) after three consecutive weeks of decreases in domestic overnight visitation from the previous week.
- Vancouver Island (+14.9%) and Vancouver, Coast & Mountains (+4.8%) regions saw week-over-week increases in movement, whereas the rest of the province saw decreases compared to the previous week:
 - Cariboo Chilcotin Coast (-41.4%)
 - Kootenay Rockies (-8.4%)
 - Northern BC (-4.6%)
 - Thompson Okanagan (-2.4%)

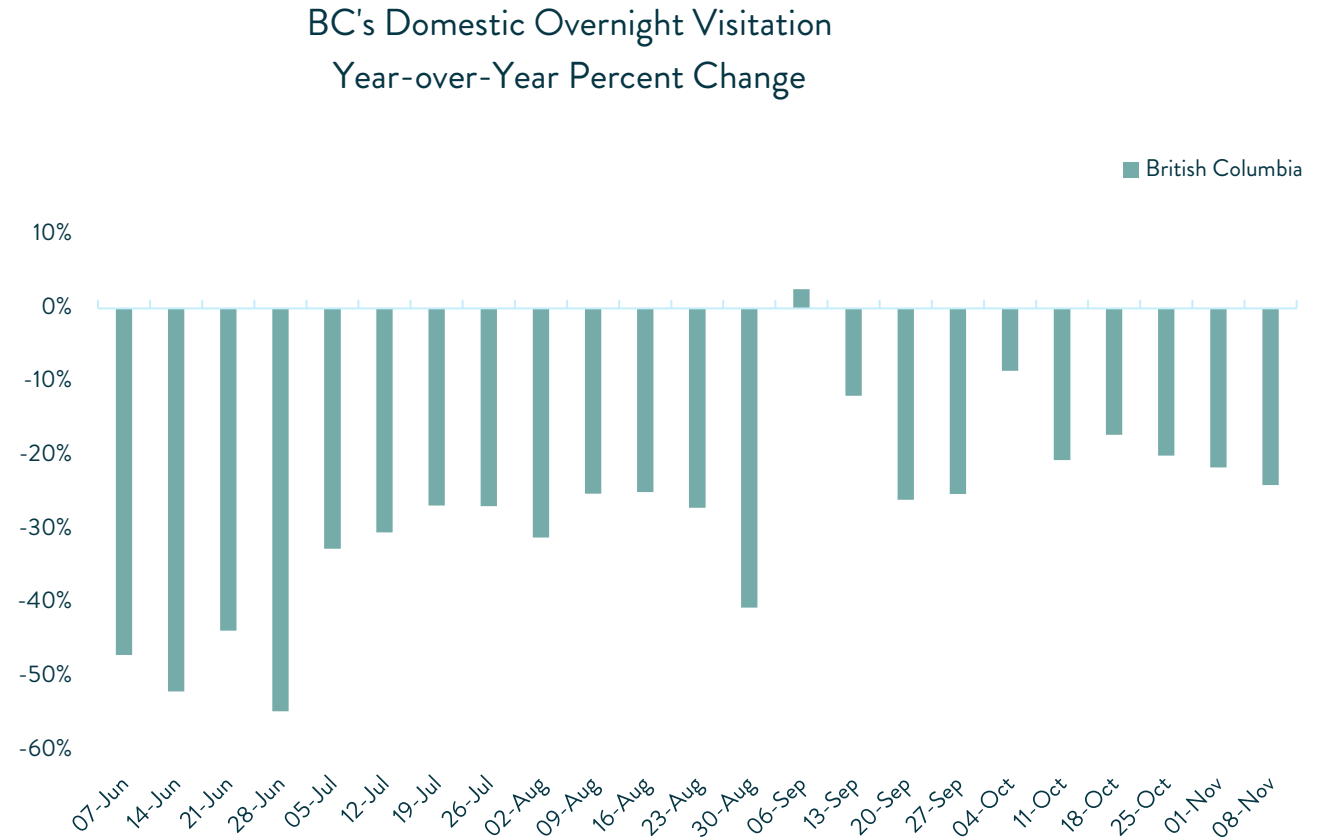


Source: [Environics Analytics Weekly COVID Tracker Report, November 8, 2020](#)



9th consecutive decrease in weekly movement in BC compared to same period in 2019

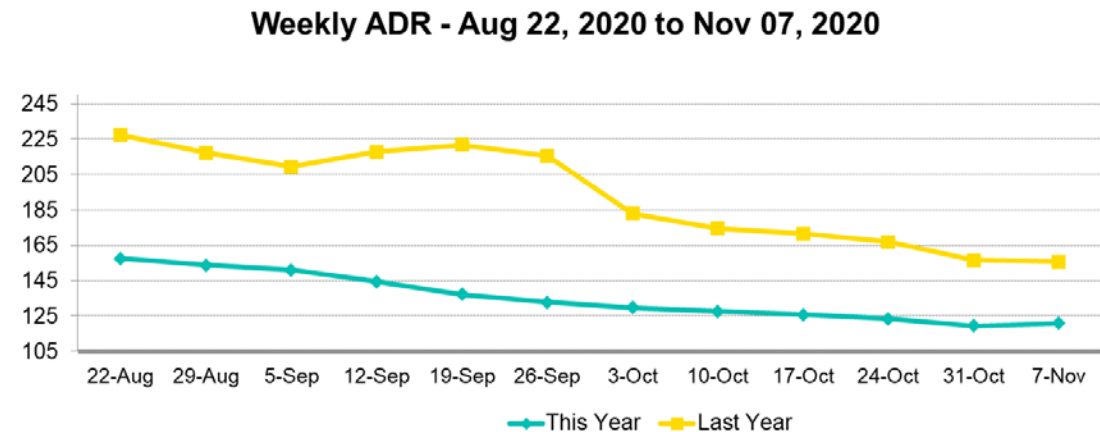
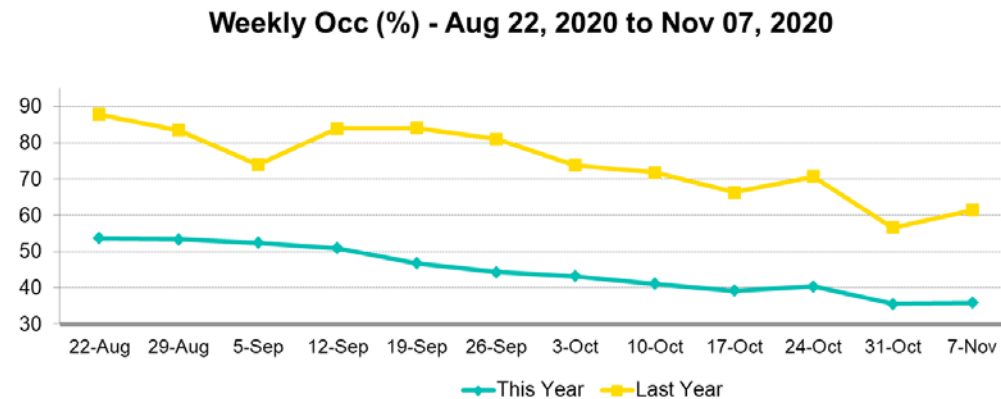
- Environics Analytics also reports year-over-year analysis in the Weekly COVID Tracker Report.
- For the ninth consecutive week, BC's overnight domestic visitation was down (-24.0%) for the week ending November 8 compared to the same week in 2019.
- A year-over-year decrease in visitation was seen across all tourism regions:
 - Vancouver, Coast and Mountains (-39.1%)
 - Kootenay Rockies (-22.8%)
 - Cariboo Chilcotin Coast (-16.6%)
 - Thompson Okanagan (-16.4%)
 - Vancouver Island (-14.2%)
 - Northern BC (-5.3%)



Source: [Environics Analytics Weekly COVID Tracker Report, November 8, 2020](#)

Hotel occupancy and ADR increases slightly from previous week, but down from previous year

- STR, an agency which captures BC hotel performance, shows the average weekly occupancy for BC was 35.8% for the week of November 1-7, 2020. This represents an increase of +0.2 points from the previous week and a decrease of -25.6 points compared to the previous year.
- BC's average daily rate (ADR) was \$120.82 for the week of November 1-7, 2020. This represents an +1.3% increase from the previous week, and a -22.3% decrease compared to a similar period in 2019.

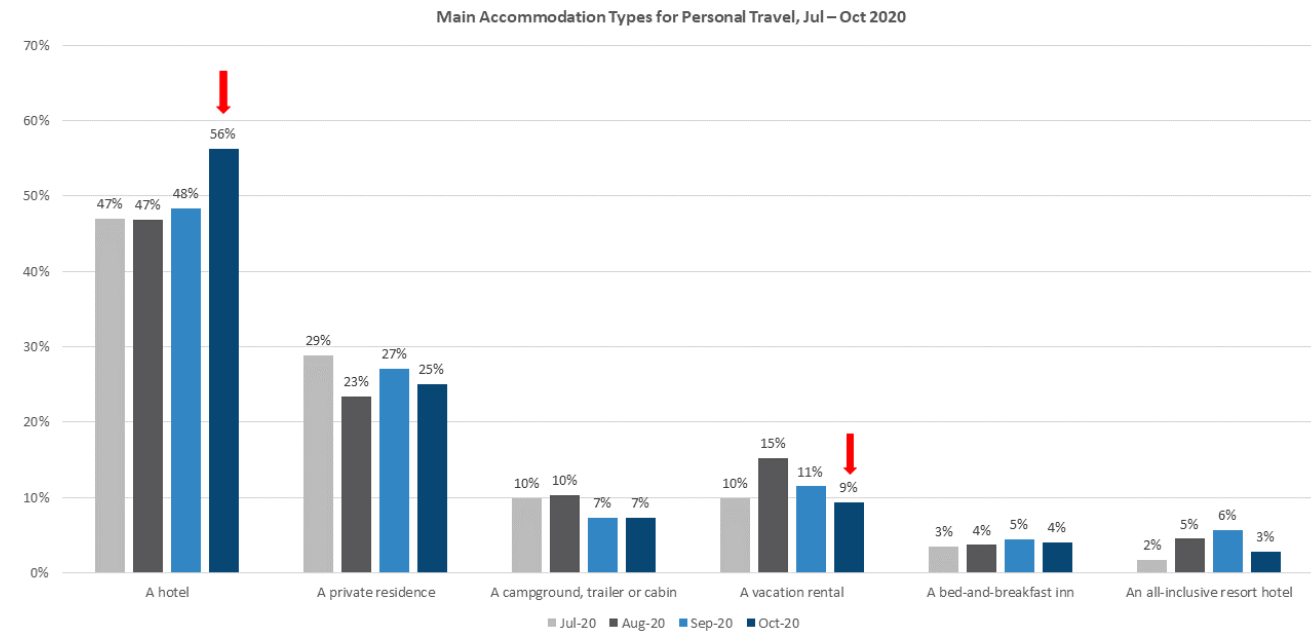


Source: [2020 STR, STR Global Ltd](#)



Hotel stays increase in the US, but recovery is a slow climb

- Skift reports that for the first time since the beginning of the pandemic, hotel stays in the US increased significantly. The period between September 20 and October 20 saw 56% of trips with hotels as the main accommodation type for personal travel, up +8 points from the month prior.
- Overall, the total rate of travel in the United States increased only slightly since April.



Source: Skift Research, November 2020

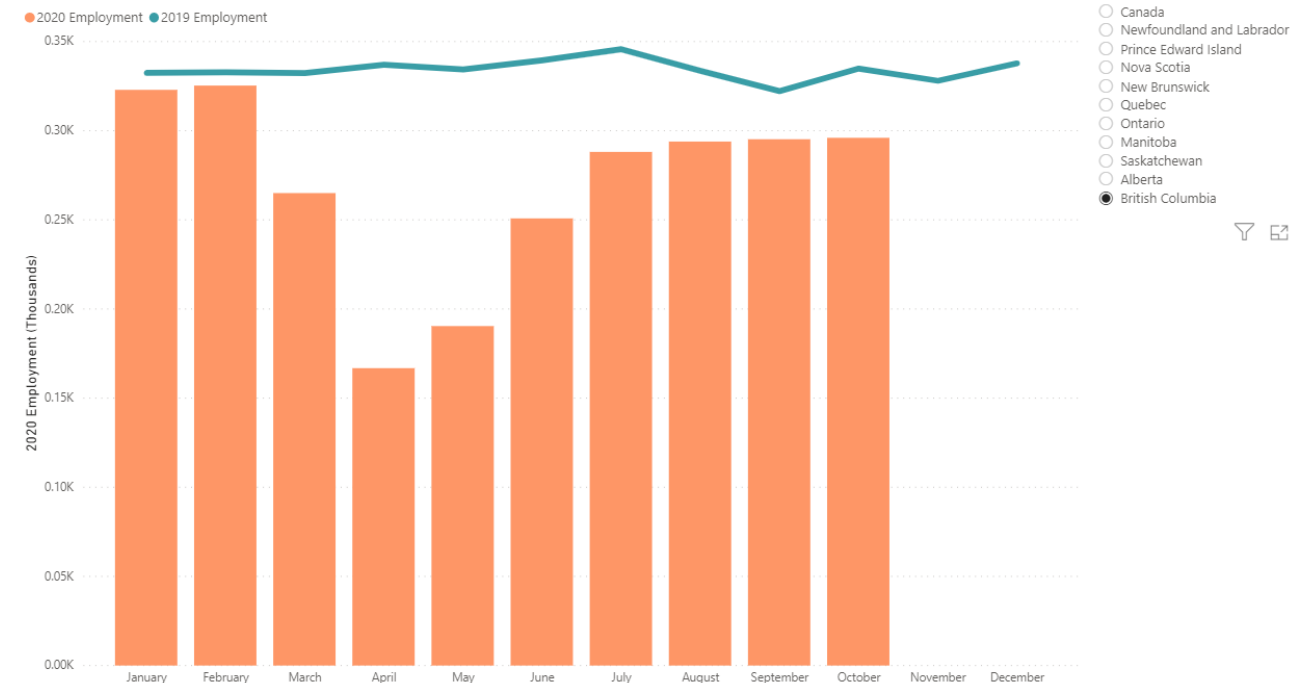
Source: [US Travel Tracker, Skift, November 2020](#)



Canadian tourism sector loses 70,400 jobs, while BC tourism sector employment up +0.3% between September and October

- Tourism HR Canada tracks employment and unemployment in the tourism sector and compares it with the overall economy.
- Overall, the Canadian economy added 84,000 jobs in October. However, for tourism, employment dropped -4.8% between September and October.
- Across Canada, the sector lost 70,400 jobs, mostly full-time positions.
- Despite BC's tourism-centric economy, few tourism jobs were gained between September and October (+0.3%).

Chart 1: Tourism Employment by Province
Tourism Employment



Source: [Tourism HR, October 2020](#)



Indigenous tourism opportunity for market share gains due to COVID-19

- A study by Insignia Research for the Indigenous Tourism Association of Canada (ITAC) states COVID-19 disruption has created an unprecedented, industry-wide opportunity for Indigenous tourism and cultural experiences.
- According to Insignia Research, attitudes precede shifts in behaviour, and both have shifted fundamentally to the advantage for Indigenous tourism, including the search by travellers for escapism and “hidden gems”.
- Escapism is being redefined to embracing a slower, more mindful pace of life with your loved ones, appreciating nature, simplicity, spirituality and soulfulness.
- To hear more, listen to the ITAC [Insignia Research Webinar](#) from October 30, timestamp 12:00.



Source: [COVID-19 Driven Interest Assessment of Canada's Domestic Market for Indigenous Tourism & Cultural Experiences, Indigenous Tourism Association of Canada, October 2020](#)

Insights West releases top 10 insights for BC brands and marketers

- In October, Insights West recently released a June report on the impact of COVID-19 on BC brands, which shows that fear is driving consumers' choices.
- The report encourages businesses to personalize their service, differentiate themselves, and use digital channels such as email to reach customers.
- The report highlights how well BC brands are responding to COVID-19, including Science World (60% rated 8, 9 or 10 out of 10), Vancouver Aquarium (56%), Vancouver Canucks (56%), Earls (56%), YVR (55%), Capilano Suspension Bridge (55%), PNE/Playland (54%), Grouse Mountain (54%), BC Ferries (53%), Air Canada (46%) and WestJet (44%).

Top 10 Insights for Brands and Marketers



Fear still driving consumers, even with restrictions lifted



High levels of personalization is key



Despite charitable giving being down, charitable sentiment is high



Email is king right now



Differentiation is key, and tell us something we don't know



Hyper-localization of consumer preferences in supporting brands



Be careful not to appear to be opportunistic



There is an expectation that prices will be higher



Sentiment that the province of BC is opening too fast, so be extra careful



Willingness to pay COVID-19 surcharges and premiums is limited



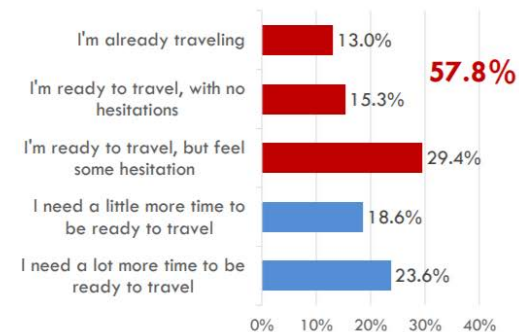
Source: [The Impact of COVID-19 on Brands, Insights West, June 2020](#)

Almost 60% of American travellers are ready to travel

- Destination Analysts, an American tourism research firm, found that almost 60% of American travellers are ready to travel, including 13% who already are travelling. This is part of a significant trend upward over the past several months.
- When asked about the perceived safety of tourism activities, 52% felt unsafe about each activity on average. This is down -15.8% from mid-July.
- 50% of American travellers are excited to travel, up from 48% last week.

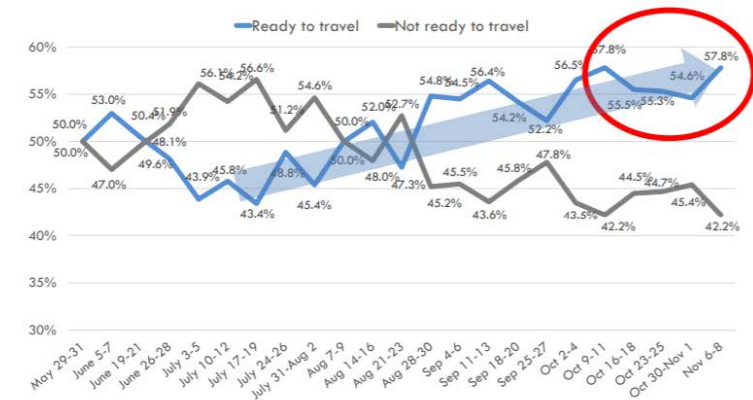
TRAVEL STATE-OF-MIND

Question: When it comes to getting back out and traveling again, which best describes your current state of mind? (Select one)



(Base: Waves 12-13 and 15-35. All respondents, 1,257, 1,214, 1,205, 1,231, 1,365, 1,213, 1,200, 1,206, 1,224, 1,201, 1,202, 1,207, 1,250, 1,225, 1,205, 1,200, 1,205, 1,203, 1,203, 1,204, 1,203, 1,203 and 1,205 completed surveys.)

Historical data



Source: [Coronavirus Travel Sentiment Index Report, Destination Analysts, November 10, 2020](#)

Global air traffic recovers slightly in September compared to August

- According to the International Air Transport Association (IATA), global air traffic was down -72.8% in September compared to the same period in 2019. However, global air traffic volume seen in September was a slight recovery from the volume decline seen in August (down -75.2% compared to August 2019).
- Domestic air travel was down -43.3% in September, an improvement from the decline seen in August (down -50.7% compared to August 2019). The improvements are largely attributed to Russia and China.



Source: [Travel Weekly, November 5, 2020](#)



Tourism and COVID-19 dashboard and reporting resources

- Destination BC's [Signals & Sentiment dashboard](#) follow core markets and informs 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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