



DESTINATION
BRITISH COLUMBIA®

COVID-19 Research Roundup

November 23, 2020

Hat Creek Ranch, Thompson Okanagan

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:

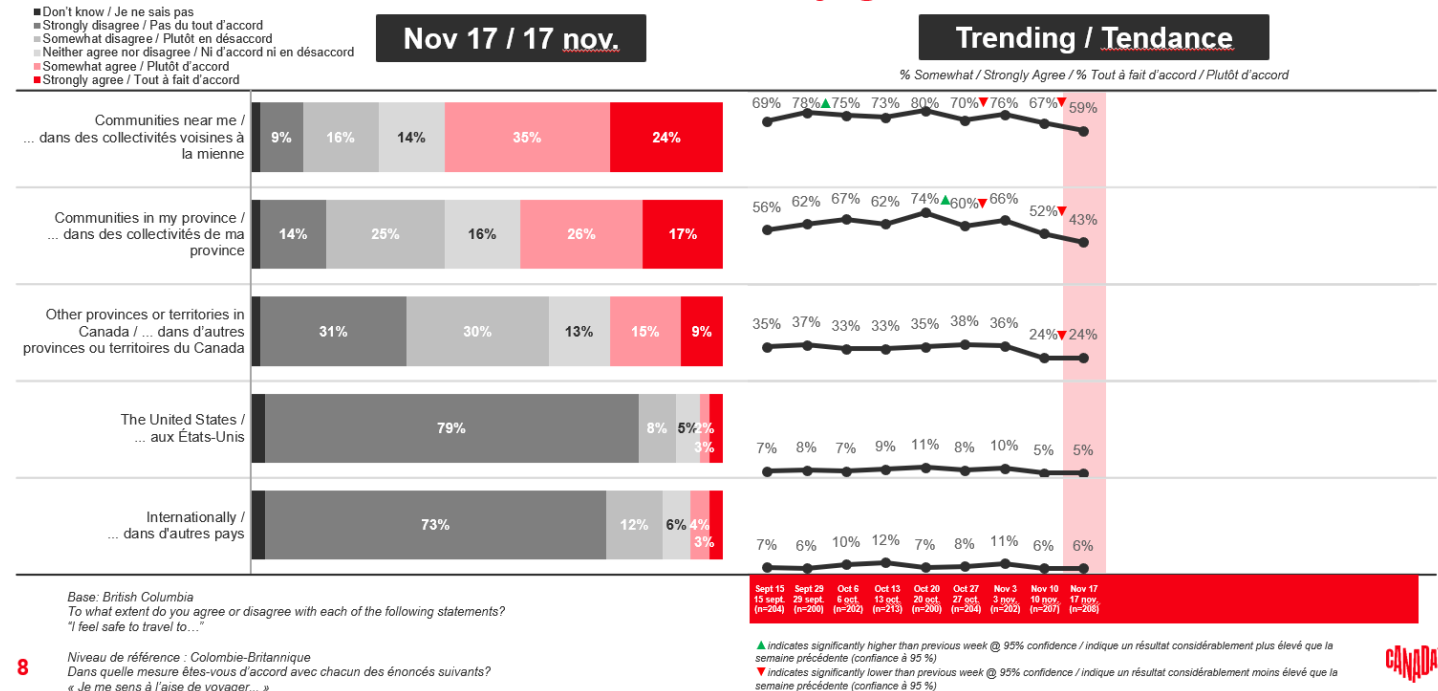
- BC residents' feelings of safety while travelling in-province continues to fall
- BC residents are postponing their local travel plans
- BC sees weekly decrease in domestic overnight visitation compared to previous week
- 10th consecutive decrease in weekly movement in BC compared to same period in 2019
- Nearly 70% of travellers within BC were BC residents for summer 2020
- Weekly accommodation performance sees a decrease during the week of November 8-14, 2020
- Similar monthly hotel occupancy trend seen across the province
- CBRE forecasts Vancouver 2020 occupancy at 31% and ADR of \$150
- Airline bookings in BC see greatest rate of decline since August
- Over 20% of BC tourism businesses lost 75-100% of revenue in September
- BC estimated to lose -82% of tourism export revenue in 2020
- Canadians more likely than Americans to take the Pfizer vaccine for COVID-19
- 2020 US travel spending expected to be down -45% from 2019
- Almost 60% of American travellers have taken a road trip during the pandemic
- WTTC says global travel & tourism could lose 174 million jobs
- Over 70 countries have no travel restrictions
- Tourism and COVID-19 dashboard and reporting resources available

BC residents' feelings of safety while travelling in-province continues to fall

- In Destination Canada's Wave 24 (November 17) report, the number of British Columbians that felt at least somewhat safe to travel to nearby communities dropped from 67% to 59%. Feelings of safety to travel within the province also dropped from the previous wave (from 52% to 43%).
- Feelings of safety travelling to other provinces or internationally remain low but stable.
- 70% of rural residents feel at least somewhat safe travelling to nearby communities, compared to 58% of urban residents who feel at least somewhat safe travelling to nearby communities.

British Columbia / Colombie-Britannique

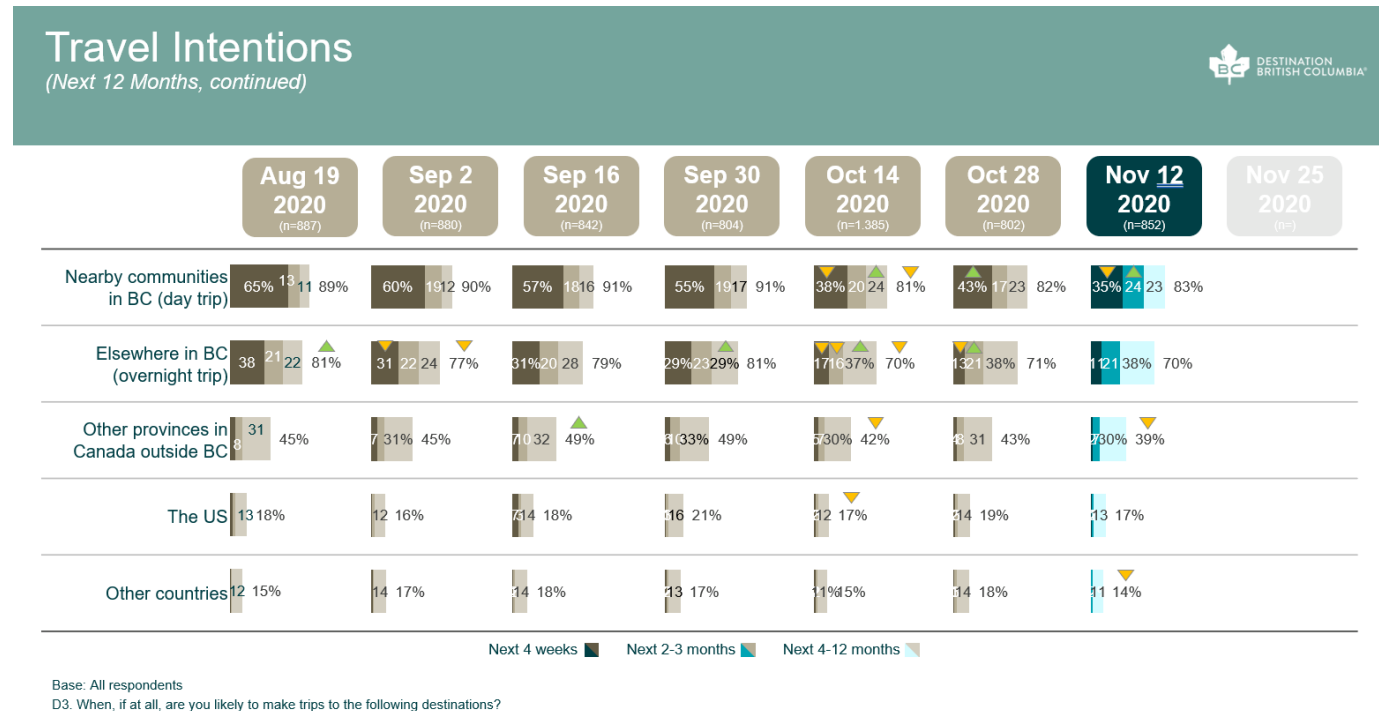
I feel safe to travel / Je me sens à l'aise de voyager



Source: [Destination Canada's Weekly Resident Sentiment, Wave 24, Leger, November 17, 2020](#)

BC residents' intentions to travel locally in the next 4 weeks has declined

- Wave 14 (November 12) of Destination BC's BC Residents' Public Perceptions survey shows that 83% of BC residents intend to travel to nearby communities within the next 12 months. This has remained stable from the prior wave, however, only 35% of residents are planning to do so in the next 4 weeks, down from 43%.
- 7% of BC residents say they will only travel to nearby communities if there is a vaccine, while 11% won't travel elsewhere in BC without one.



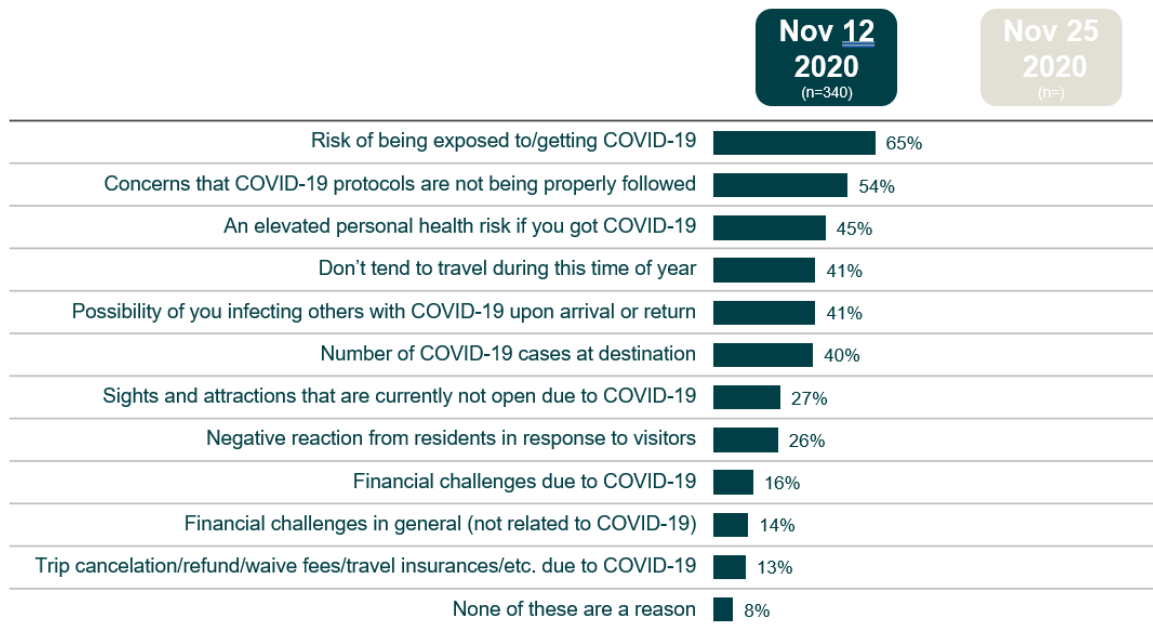
Source: [Destination BC's BC Residents' Public Perceptions: COVID-19 Travel and Tourism Wave 14, Insights West, November 12, 2020](#)

BC residents primary reason not to travel is to avoid exposure/contracting the virus

- A new question was included in Wave 14 (November 12) of Destination BC's BC Residents' Public Perceptions survey to assess reasons for not intending to travel in the next 3 months or until a vaccine is available.
- Of those BC residents not intending to travel in BC in the next 3 months or those not willing to travel without a vaccine, 65% are concerned about their risk of being exposed to or contracting COVID-19.
- 54% are concerned that safety protocols are not being properly followed.

Aided Reasons for Not Considering BC Travel

(Among Those Not Intending to Travel in BC in the Next 3 Months)



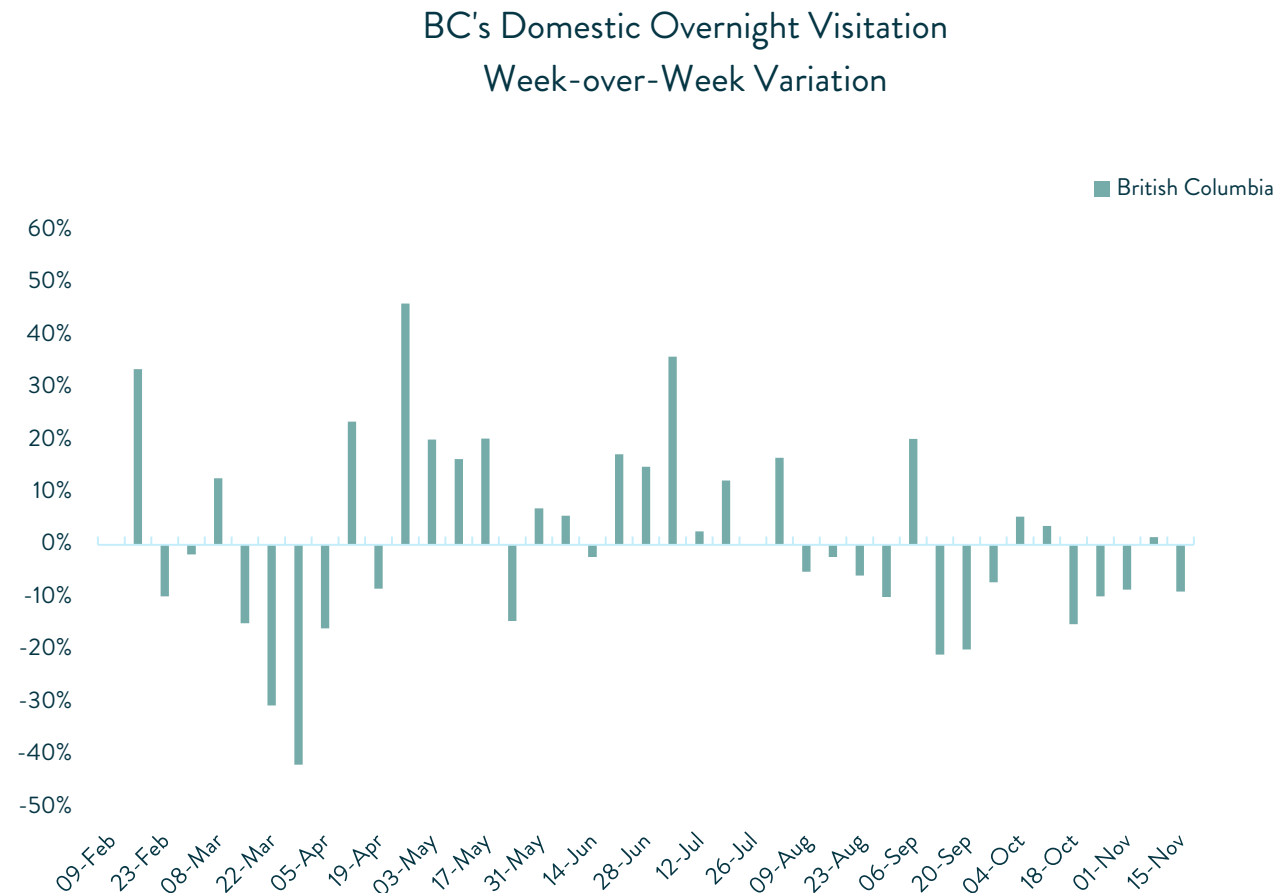
Base: Those who are not likely to take a daytrip in BC or an overnight trip in BC in the next 3 months
D4. Why are you **not** likely to travel in BC for a day trip or an overnight trip in the next 3 months?

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



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

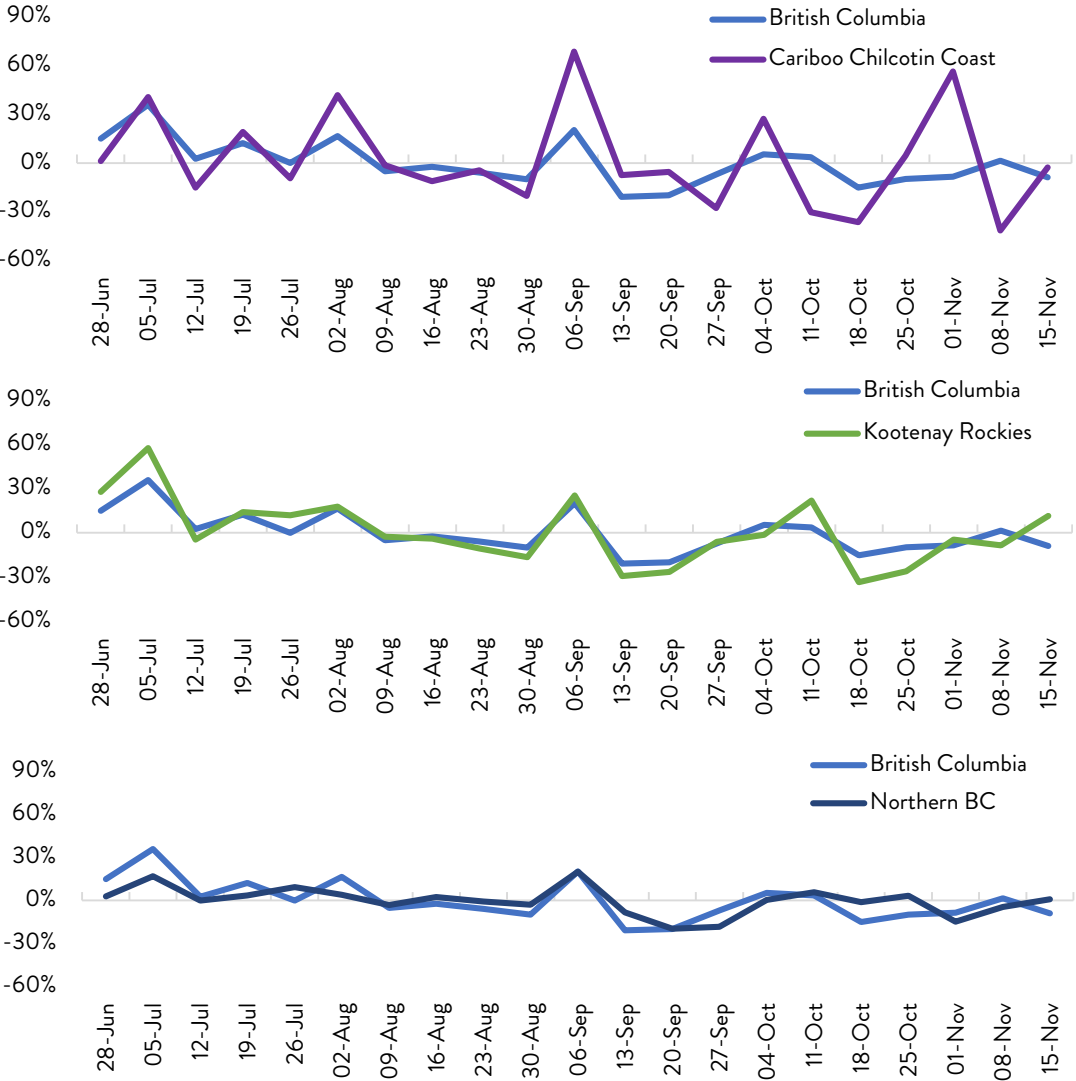
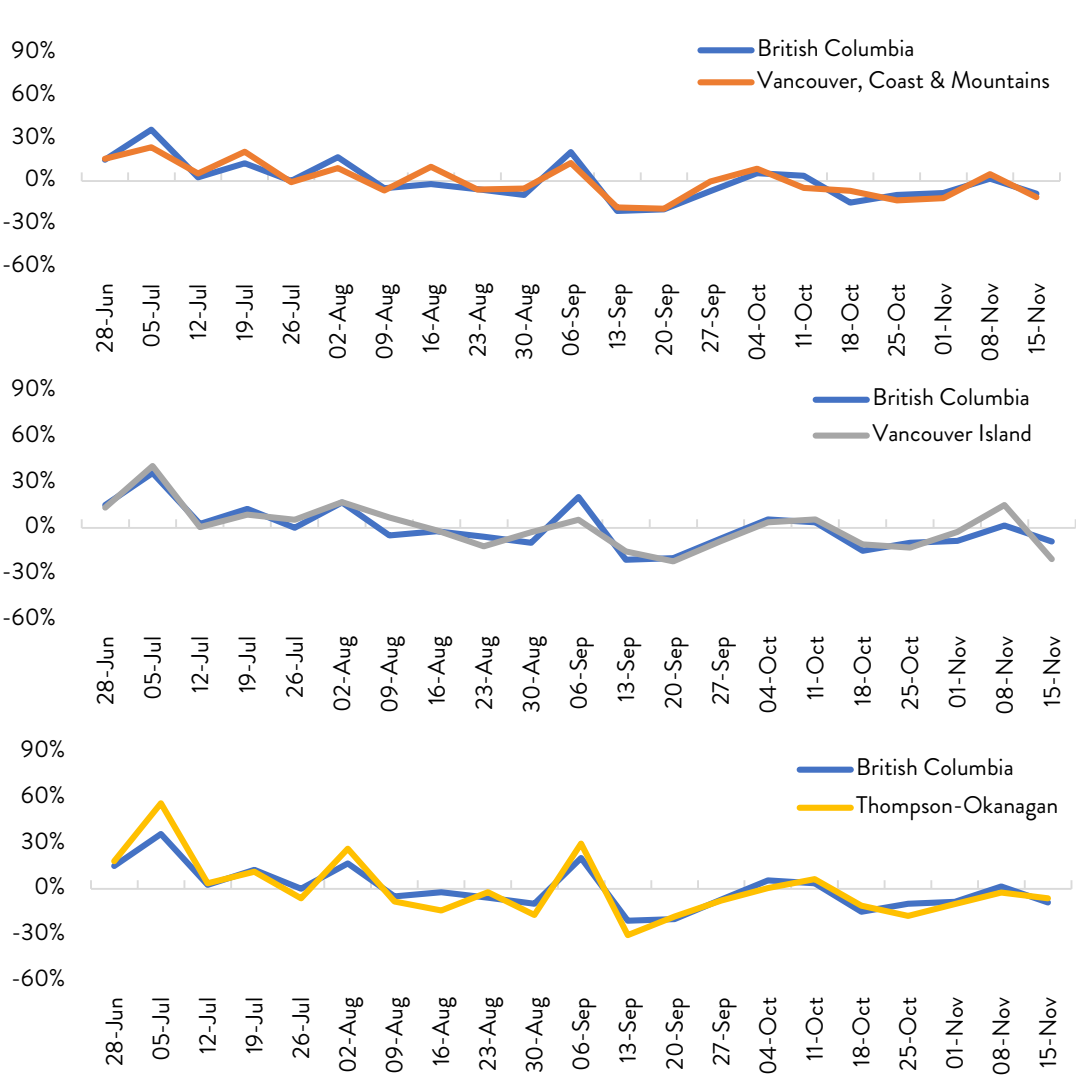
- According to Environics Analytics Weekly COVID Tracker Report, during the week ending November 15, BC experienced a week-over-week decrease (-8.9%).
- With the exception of Kootenay Rockies (+11.4%) and Northern BC (+0.9%), which saw week-over-week increases in movement, decreases in movement in domestic overnight visitation were seen throughout the rest of the provinces:
 - Vancouver Island (-20.6%)
 - Vancouver, Coast & Mountains (-11.4%)
 - Thompson Okanagan (-6.2%)
 - Cariboo Chilcotin Coast (-2.7%)



Source: [Environics Analytics Weekly COVID Tracker Report, November 15, 2020](#)

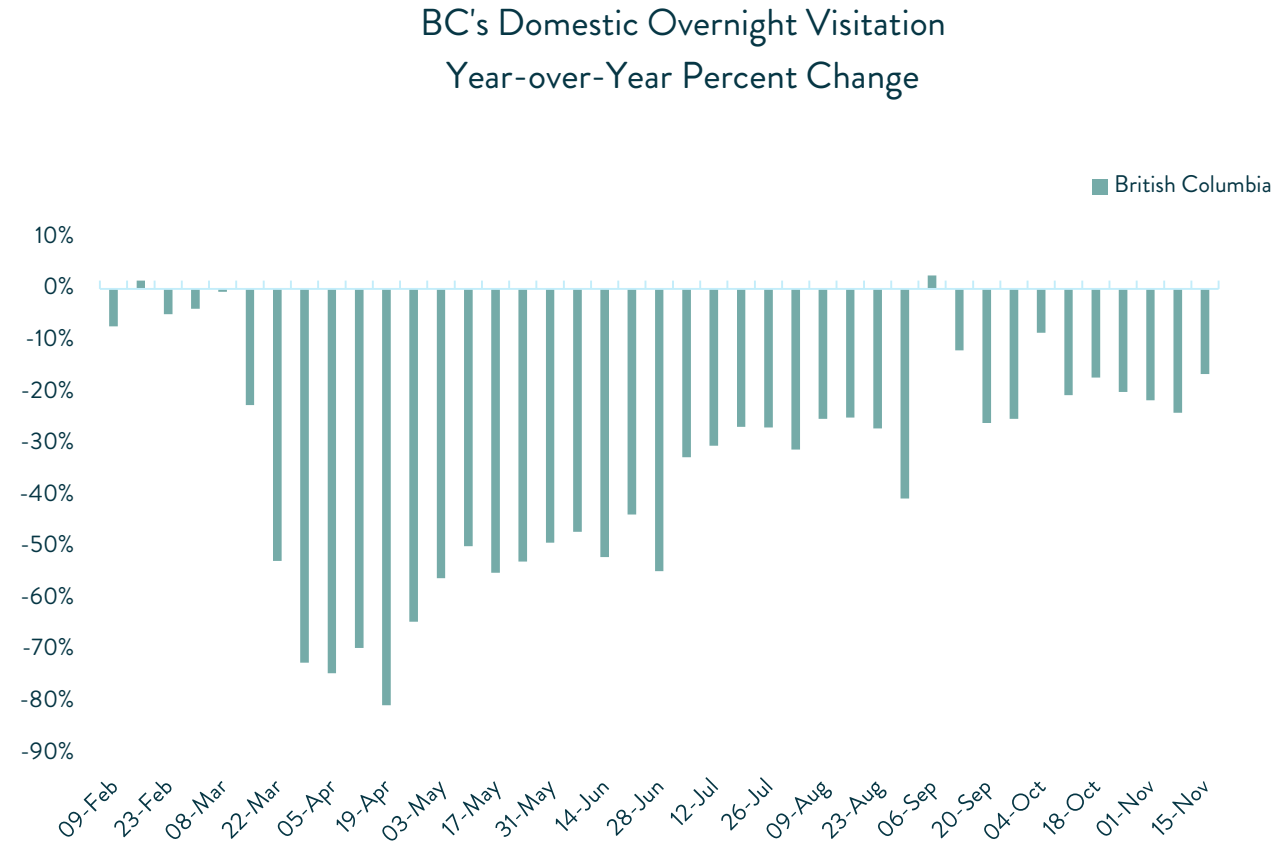


BC and Regional Domestic Overnight Visitation Week-over-Week Variation



10th consecutive decrease in weekly movement in BC compared to same period in 2019

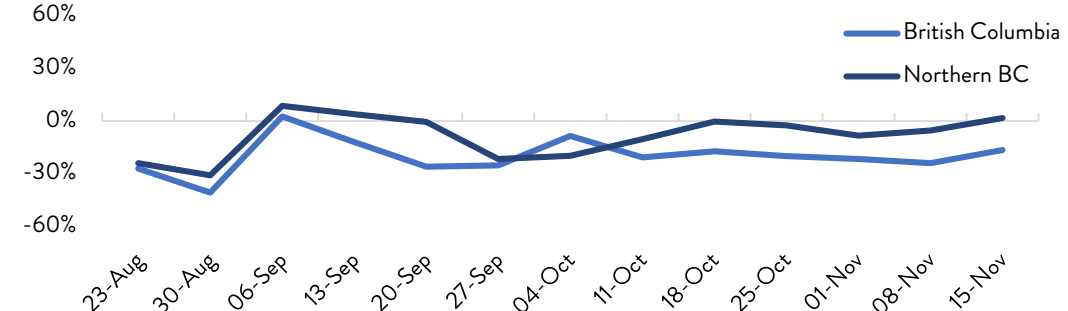
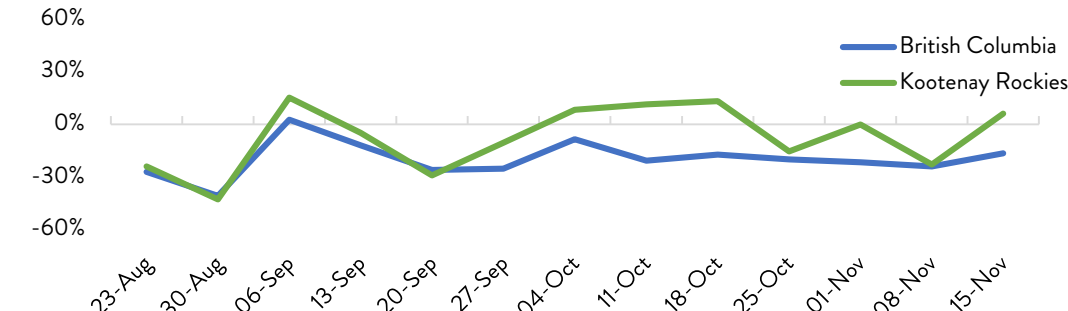
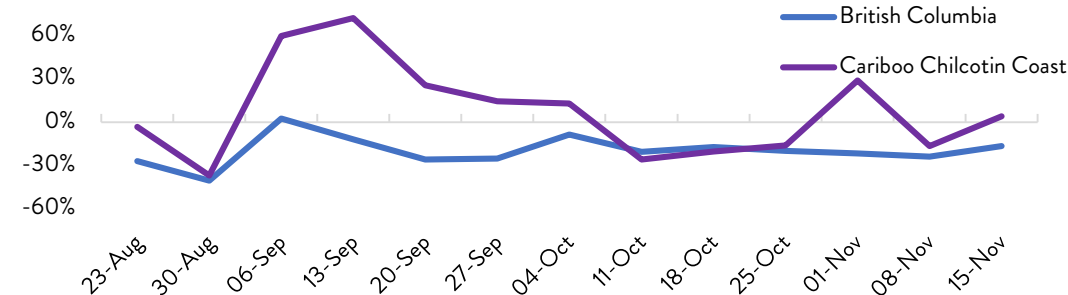
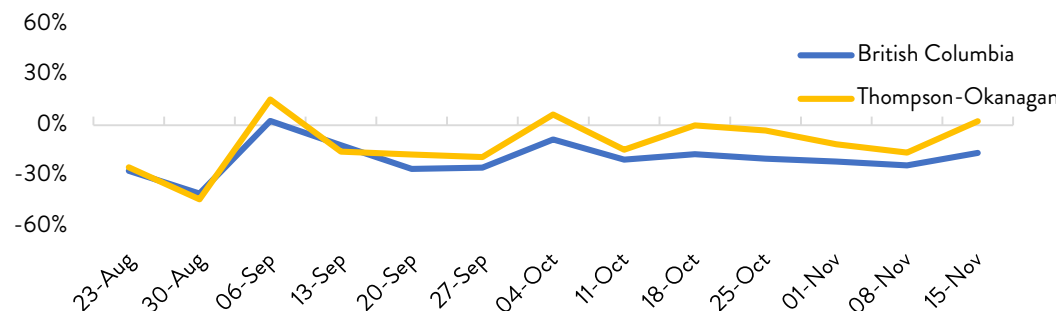
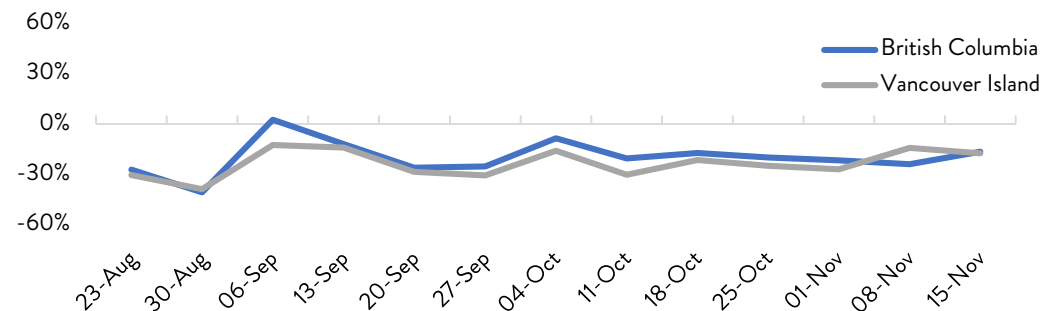
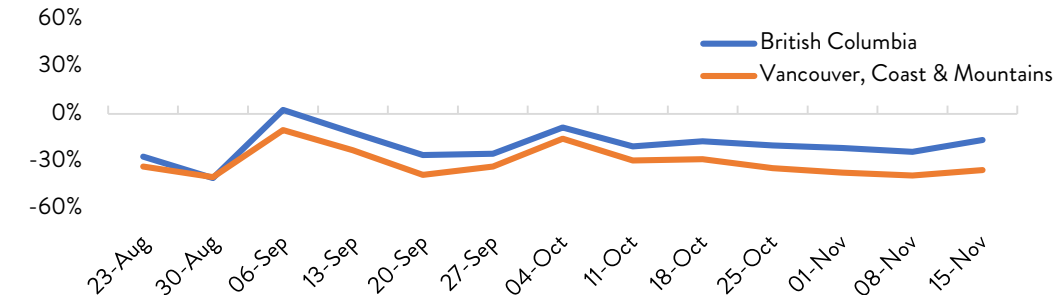
- Environics Analytics also reports year-over-year analysis in the Weekly COVID Tracker Report.
- For the tenth consecutive week, BC's overnight domestic visitation was down (-16.5%) for the week ending November 15 compared to the same week in 2019.
- A year-over-year decrease in visitation was seen in:
 - Vancouver, Coast and Mountains (-35.6%)
 - Vancouver Island (-17.4%)
- Whereas a year-over-year increase in visitation was seen in:
 - Kootenay Rockies (+6.1%)
 - Cariboo Chilcotin Coast (+4.1%)
 - Thompson Okanagan (+2.4%)
 - Northern BC (+1.8%)



Source: [Environics Analytics Weekly COVID Tracker Report, November 15, 2020](#)



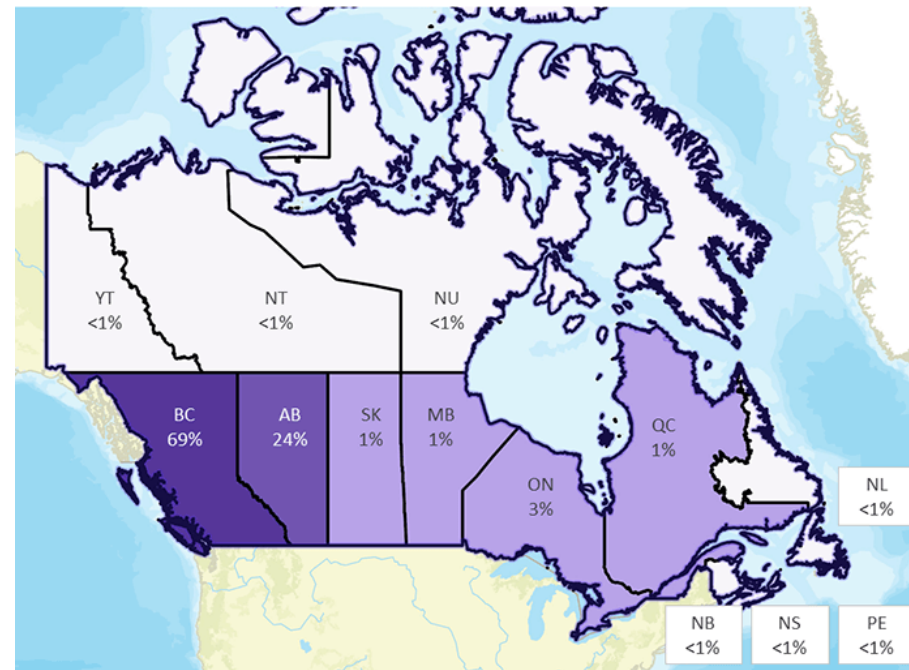
BC and Regional Domestic Overnight Visitation Year-over-Year Percent Change



Nearly 70% of travellers within BC were BC residents for summer 2020

- Environics Analytics VisitorView database shows that almost 70% of all visitors to British Columbia destinations for summer 2020 were BC residents, which was the highest rate in Canada.
- Approximately 44% of all travellers hailed from the Vancouver area and chose destinations such as the Thompson-Okanagan or Vancouver Island for weekend getaways.
- British Columbia has the lowest decline of Out-of-Province visitors at a -40% reduction. It is notable compared to other large provinces like Ontario and Quebec, with declines of -56% and -61%, respectively.

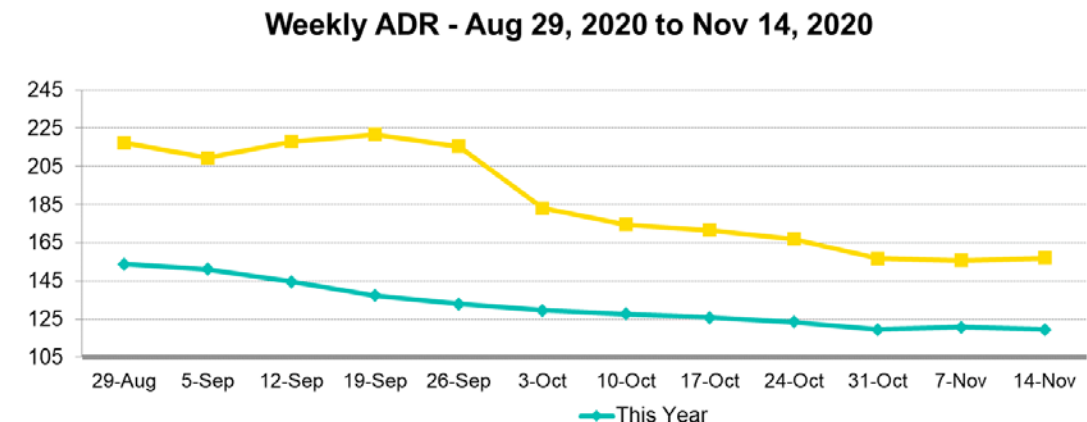
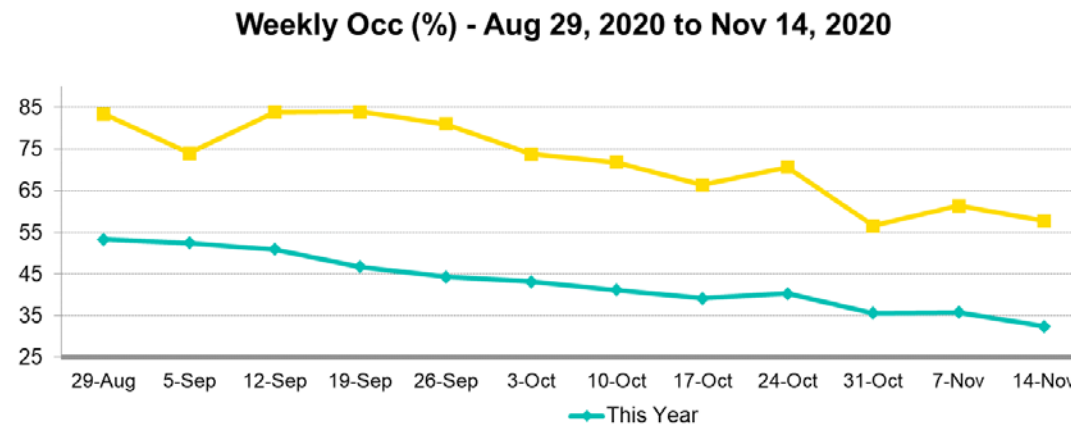
Visitors to BC - Summer 2020 - by Province



Source: [How COVID-19 has changed travel patterns in Canada — What the data says, Environics Analytics, October 30, 2020](#)

Weekly accommodation performance sees a decrease during the week of November 8-14, 2020

- STR, an agency which captures BC hotel performance, shows the average weekly occupancy for BC was 32.4% for the week of November 8-14, 2020. This represents a decrease of -3.4 points from the previous week and a decrease of -25.3 points compared to the previous year.
- BC's average daily rate (ADR) was \$119.39 for the week of November 8-14, 2020. This represents a -1.2% decrease from the previous week, and a -24.0% decrease compared to a similar period in 2019.



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



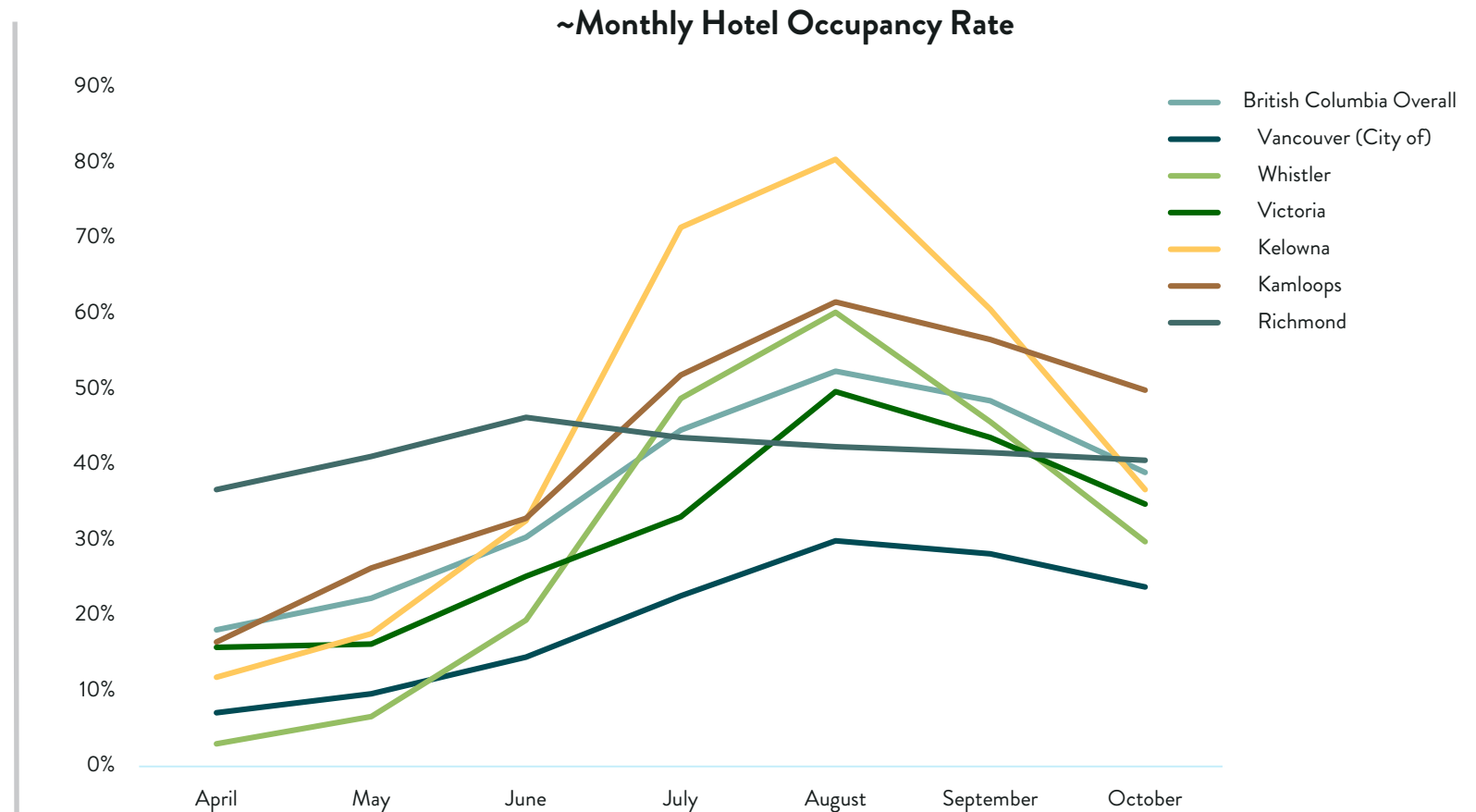
British Columbia's Hotel Occupancy Rate and Average Daily Room Rate

Source: STR Nov 8 – 14, 2020	Nov 8 – 14, 2020	Week-over-Week Nov 8 – 14, 2020 vs. Nov 1 - 7, 2020	Year-over-Year Nov 8 – 14, 2020 vs. Nov 10 - 16, 2019	Nov 8 – 14, 2020	Week-over-Week Nov 8 – 14, 2020 vs. Nov 1 - 7, 2020	Year-over Year Nov 8 – 14, 2020 vs. Nov 10 - 16, 2019
	Occupancy Rate	Occupancy Point Change	Occupancy Point Change	ADR	ADR Percent Change	ADR Percent Change
British Columbia	32.4%	-3.4	-25.3	\$119.39	-1.2%	-24.0%
Vancouver (City of)	19.5%	-2.8	-55.2	\$142.92	-3.6%	-29.4%
Whistler	28.5%	0.8	-2.4	\$186.36	0.9%	-12.3%
Victoria	31.2%	-1.7	-24.0	\$139.59	2.0%	-0.7%
Kelowna	26.6%	-3.6	-27.1	\$105.99	-3.9%	-17.6%
Kamloops	42.4%	-7.4	2.6	\$92.20	-2.6%	-10.8%
Richmond	39.9%	0.7	-34.6	\$121.20	-1.2%	-22.9%



Similar monthly hotel occupancy trend seen across the province

- STR, an agency which captures BC hotel performance, provides running 28 day totals.
- Between April and October, BC's average hotel occupancy rate varied, with higher occupancy seen during July, August and September. Similar trends were seen across the province in select cities being monitored.
- While high occupancy rates have been seen, they remain lower than what has been seen in 2019.
- Note, monthly values are based on running 28 day totals. This means that for a given month, the occupancy rate may include days from the neighbouring months and/or may not include the full number of days within the month (e.g. September represents: Aug 30 – Sep 26).



Source: [2020 STR, STR Global Ltd, Running 28 Day Month](#)



CBRE forecasts Vancouver 2020 occupancy at 31% and ADR of \$150

- According to the CBRE Hotels Canada 2020 Major Markets Forecast, Vancouver is forecasted to achieve 31% occupancy (-49 points compared to 2019), \$150 ADR (-32%) and \$46 RevPAR (-73%) for 2020.
- Vancouver is forecasted to have the highest occupancy rate of any other major domestic market, including Calgary (24%), Toronto (26%), Montreal (21%), and Quebec City (23%).

2020 Major Market Forecast						
		2017	2018	2019	2020 Forecast	2019-20 Change
National	Occ	66%	66%	65%	32%	-33 pts
	ADR	\$155	\$162	\$164	\$128	-21%
	RevPAR	\$102	\$107	\$107	\$41	-61%
Vancouver	Occ	79%	80%	80%	31%	-49 pts
	ADR	\$190	\$212	\$219	\$150	-32%
	RevPAR	\$150	\$170	\$175	\$46	-73%



Source: [2020 Major Markets Forecast, CBRE Hotels Canada, November 2020](#)

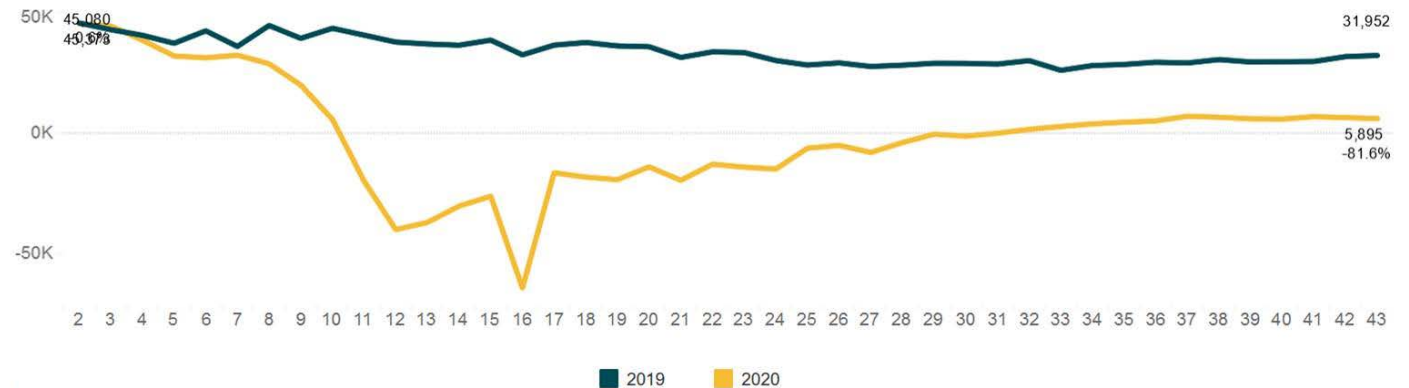
Airline bookings in BC see greatest rate of decline since August

- ForwardKeys, a flight analysis company, has shown that during the week of November 2, 2020, there were 6,513 airline bookings made within BC. This is a decrease of -81.4% from the same time period last year, making this the greatest rate of decline over 2019 since August 31, 2020.
- 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

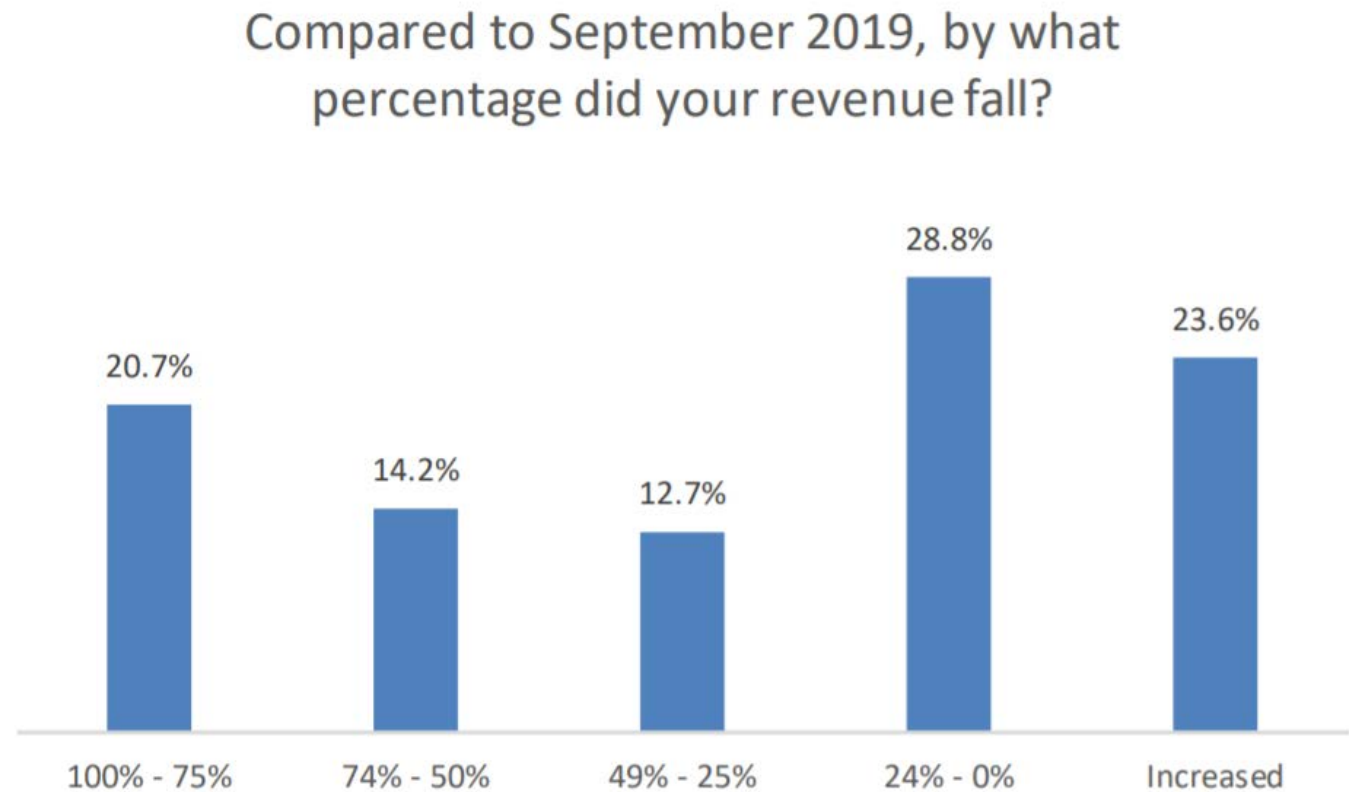
Bookings Made to BC by Week; negative values indicate more cancellations than bookings in a given week. Please hover over data points to see more information. Source: ForwardKeys



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

Over 20% of BC tourism businesses lost 75-100% of revenue in September

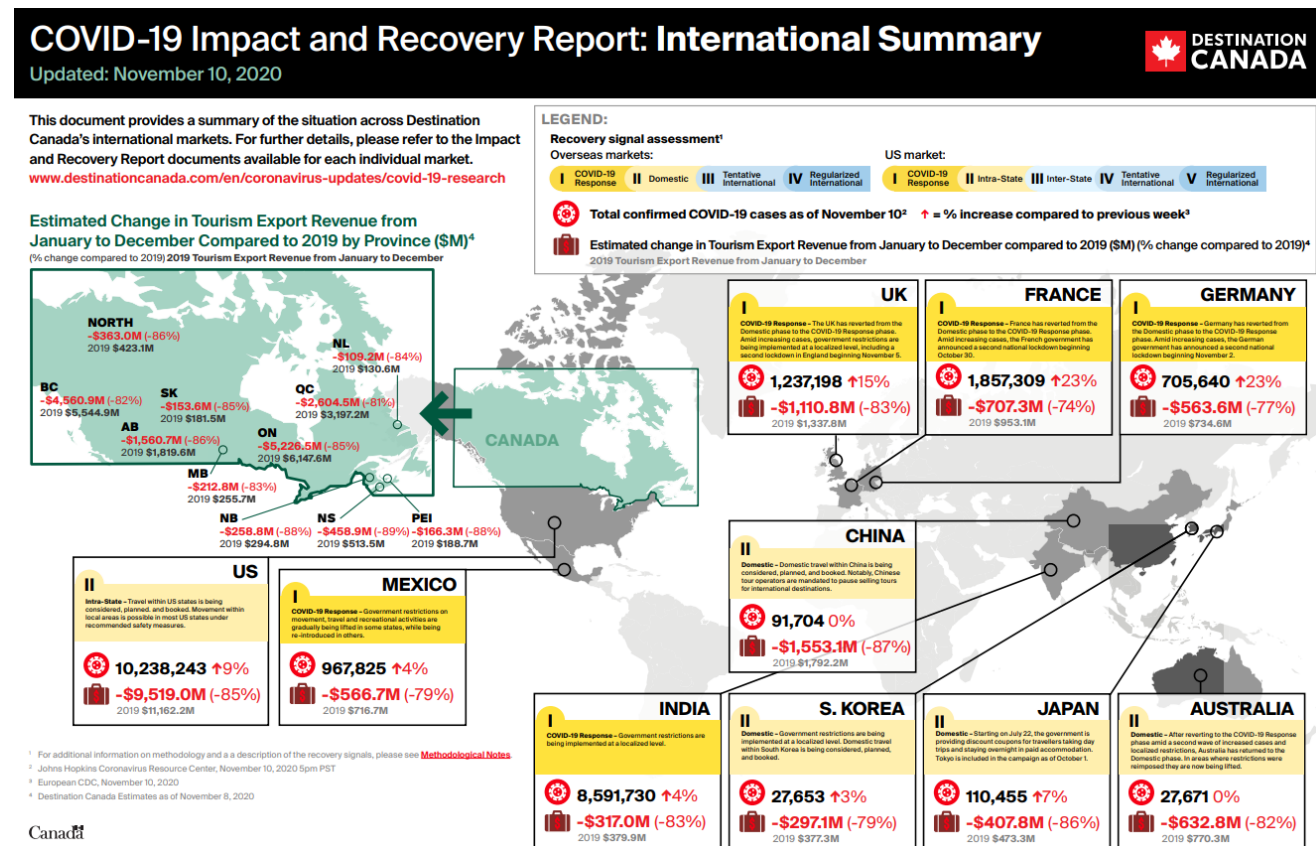
- According to the BC Regional Tourism Secretariat, over 20% of BC tourism businesses reported losing between 75-100% of their revenue compared to September 2019.
- The number of businesses reporting “business as usual” has stayed the same since the last survey. 58% are operating with a reduction in hours, staff, and/or services, and 13% are either temporarily closed or not yet reopened due to COVID-19. 1% have closed permanently due to COVID-19.



Source: [COVID-19 Tourism Impact Report, BC Tourism Regional Secretariat, November 2020](#)

BC estimated to lose -82% of tourism export revenue in 2020

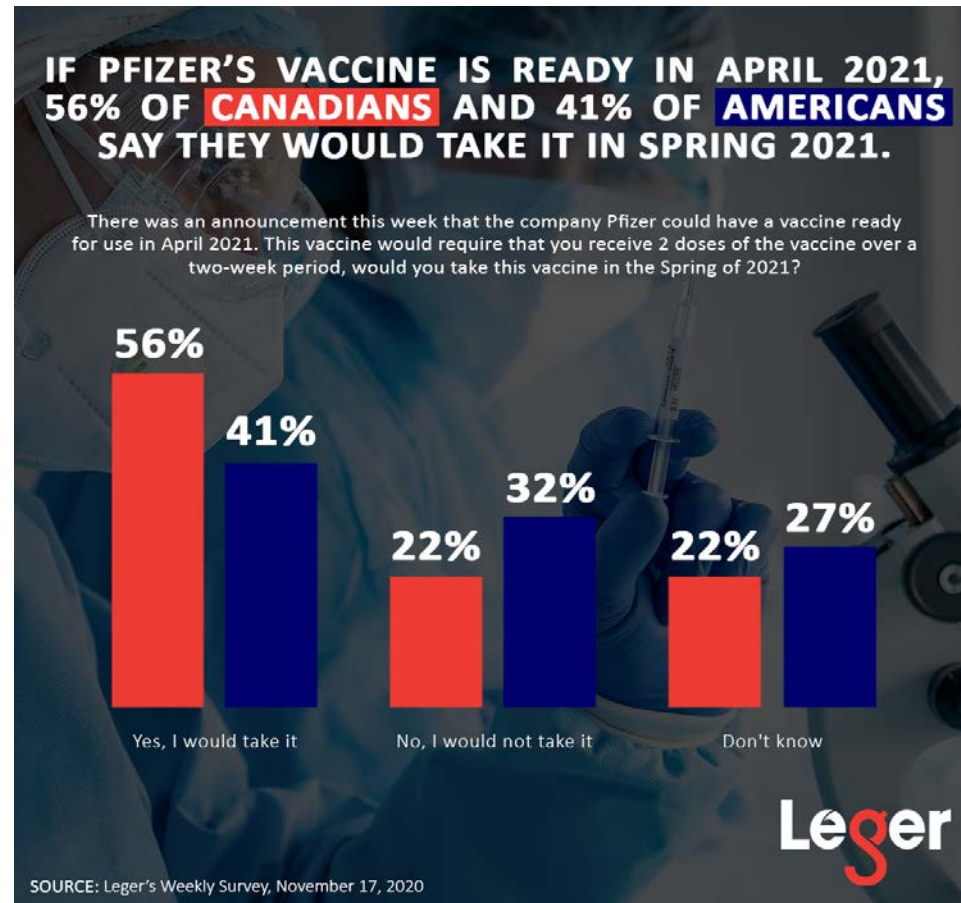
- Destination Canada's latest international report for COVID-19 impact recovery shows that BC's tourism export revenue is estimated to drop -82% for 2020 from 2019 levels. This equates to a loss of -\$4,560.9 million, almost half of the US's total estimated export revenue loss.
- Half of Destination Canada's international markets are still in 'Phase 1 – COVID-19 Response' of Destination Canada's Recovery Signal Assessment Plan. Half were open to domestic travel (prior to recent travel restrictions put in place across many provinces and territories).



Source: [Destination British Columbia based on Destination Canada's GTW COVID Special Report Wave 3, November 10, 2020](#)

Canadians more likely than Americans to take the Pfizer vaccine for COVID-19

- According to Leger, only 56% of Canadians and 41% of Americans would take the Pfizer vaccine if it were ready in April 2021.



Source: [Leger, November 17, 2020](#)

2020 US travel spending expected to be down -45% from 2019

- The US Travel Association is expecting travel spending in the US to be down -45% from 2019 levels. Recovery isn't expected until 2024.
- This includes a decline of -34% in domestic leisure travel spending, -55% for domestic business travel, and -77% from international inbound markets.

U.S. TRAVEL FORECAST			TRAVEL FORECAST				
	2018	2019	2020	2021	2022	2023	2024
Total Travel Spending in the U.S. (\$ Billions)	1,088	1,127	617	847	966	1,043	1,100
U.S. Residents	931	972	582	785	871	924	968
Business	282	291	131	244	248	258	266
Leisure	649	681	450	541	624	666	702
International Visitors ¹	157	155	36	62	95	118	132
Total International Visitors to the U.S. (Millions)	79.7	79.3	19.0	33.0	52.5	67.4	76.3
Canada	21.5	20.7	4.8	9.1	14.6	18.4	21.3
Mexico	18.4	18.1	7.1	10.6	14.7	18.2	18.9
Overseas	39.9	40.4	7.2	13.2	23.1	30.8	36.1
Global Long-Haul Travel (Millions)	342.3	357.0	99.3	169.2	253.8	314.9	357.6
U.S. Share of global long-haul travel (%)²	11.7	11.3	7.2	7.8	9.1	9.8	10.1
Total U.S. Domestic Person-Trips³ (Millions)	2,278	2,318	1,600	1,905	2,272	2,376	2,455
Business	459	464	185	229	395	433	457
Leisure	1,819	1,854	1,415	1,676	1,876	1,942	1,998
GDP, Nominal (\$ Billions)	20,612	21,433	20,948	22,158	23,257	24,247	25,225
Unemployment Rate (%)	3.9	3.7	8.3	6.7	5.5	4.6	4.2
Consumer Price Index (CPI) ⁴	251	256	259	263	268	273	278
Travel Price Index (TPI)⁴	287	292	265	273	282	290	306



Source: [US Travel Association, November 17, 2020](#)

Almost 60% of American travellers have taken a road trip during the pandemic

- According to Destination Analysts latest COVID report, November 15, over 23% of American travellers have travelled by air during the pandemic. Almost 60% have taken a road trip.
- Over 70% of American travellers don't intend to travel during the holidays.
- Pfizer's announcement of a vaccine has made over 60% of American travellers more optimistic about travelling safely.

TRAVEL DURING THE PANDEMIC AS OF NOVEMBER 15TH

AMERICANS WHO HAVE TRAVELED BY AIR



QUESTION: HAVE YOU TRAVELED ON A COMMERCIAL AIRLINE SINCE THE START OF THE CORONAVIRUS PANDEMIC (MARCH 2020 TO TODAY)?

(Base: Wave 36 data. All respondents, 1,206 completed surveys. Data collected Nov 13-15, 2020)

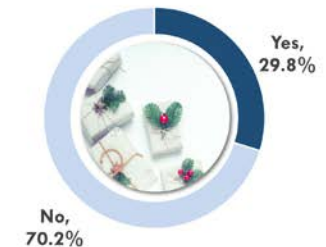
AMERICANS WHO HAVE TAKEN A ROAD TRIP



QUESTION: HAVE YOU TAKEN ANY ROAD TRIPS (50 MILES OR MORE FROM YOUR HOME) SINCE THE START OF THE CORONAVIRUS PANDEMIC (MARCH 2020 TO TODAY)?

(Base: Wave 36 data. All respondents, 1,206 completed surveys. Data collected Nov 13-15, 2020)

AMERICANS WHO HAVE HOLIDAY TRAVEL PLANS



QUESTION: DO YOU HAVE ANY TRAVEL PLANS (EVEN IF TENTATIVE) FOR THE HOLIDAY SEASON THIS YEAR?

(Base: Wave 36 data. All respondents, 1,206 completed surveys. Data collected Nov 13-15, 2020)

Destination Analysts
DO YOUR RESEARCH



Source: [Destination Analysts, November 15, 2020](#)

WTTC says global travel and tourism could lose 174 million jobs

- The World Travel & Tourism Council says the global economy could lose 174 million tourism jobs. 143 million jobs globally have already been impacted.
- Worst-case scenarios can be avoided, says the WTTC, if an immediate coordinated response is implemented. This could save 31 million jobs by the end of 2020.



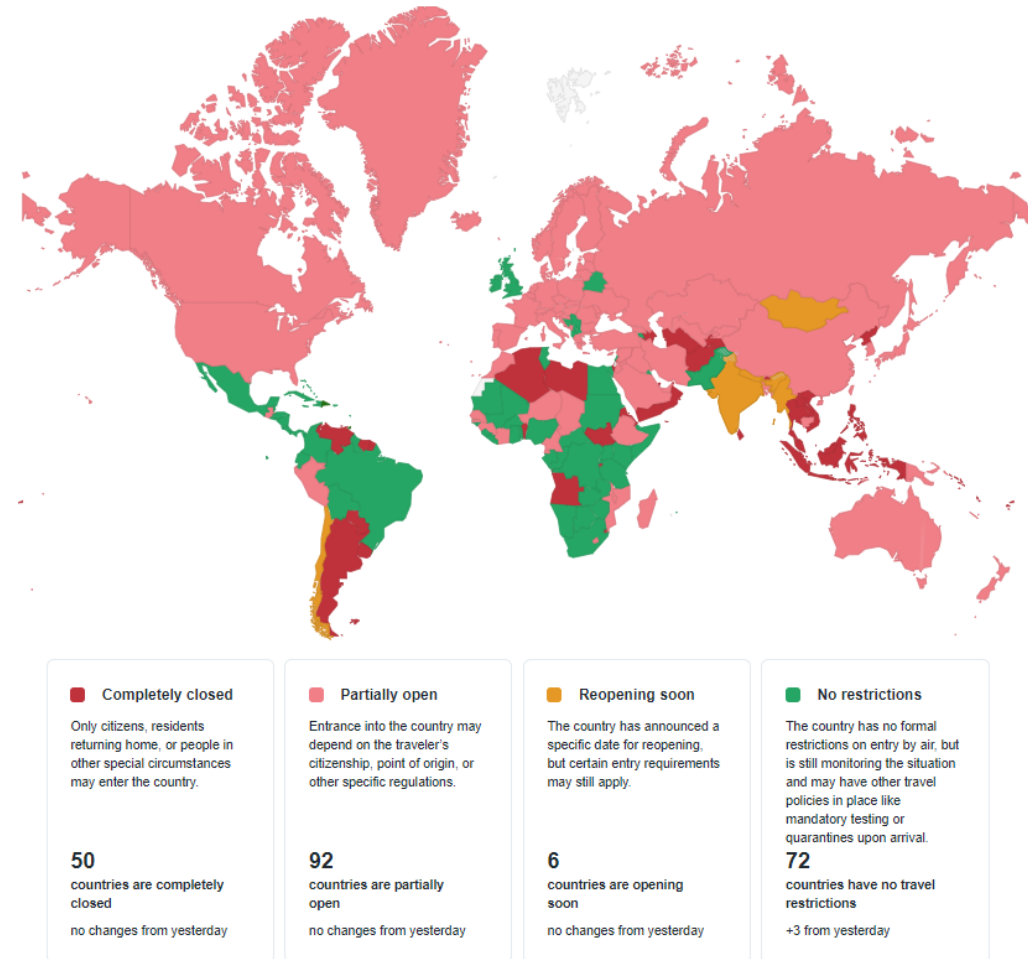
Source: [World Travel & Tourism Council, October 29, 2020](#)

Over 70 countries have no travel restrictions

- A database by Kayak shows that as of November 24, over 73 countries have no travel restrictions, while 5 are opening soon and 92 are partially open.
- Countries with no travel restrictions include Mexico, South Africa, Costa Rica, Cuba, Egypt, Pakistan, Serbia, Tunisia, Ireland, and the UK.

Travel restrictions by country*

This map shows which countries have entry restrictions by air for travel into the country.



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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