



DESTINATION
BRITISH COLUMBIA®

COVID-19 Research Roundup

November 30, 2020

Victoria, Vancouver Island

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. Some 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:

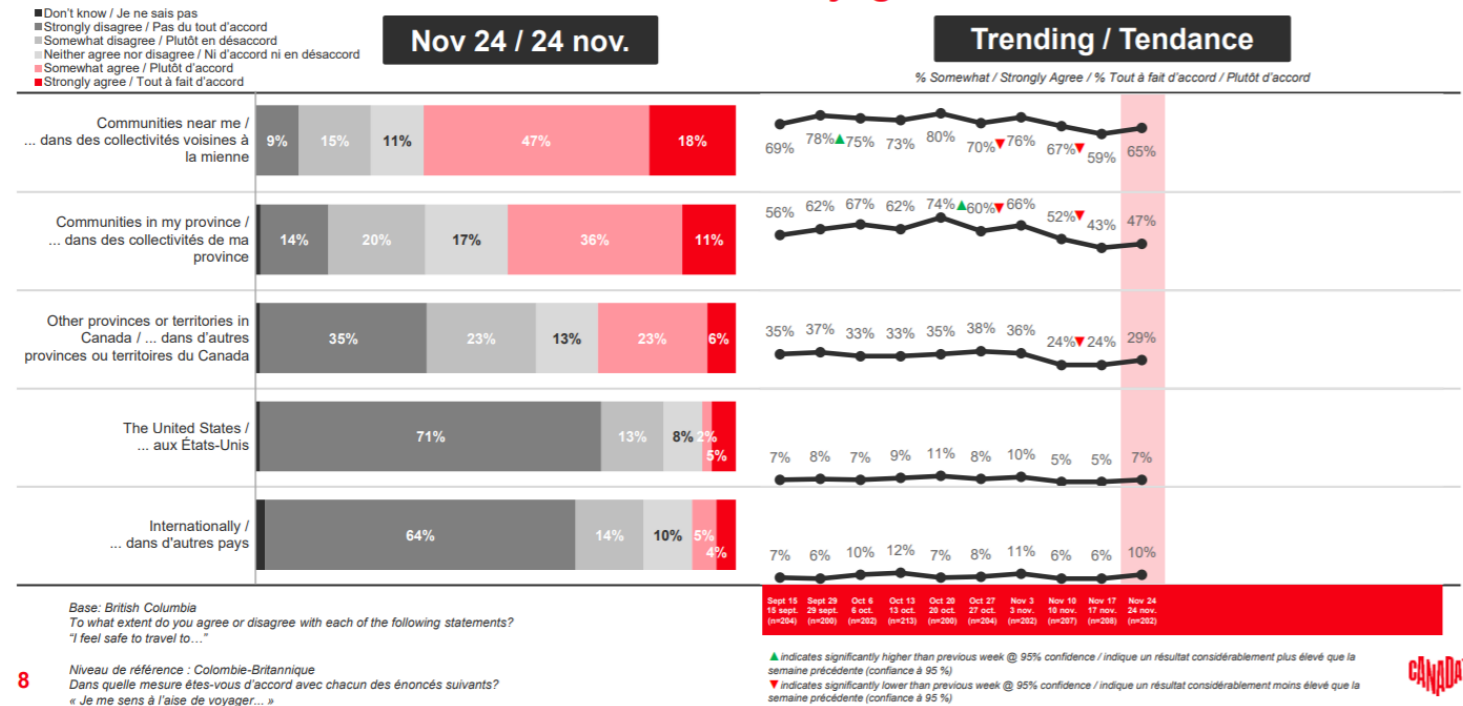
- BC residents feel safer to travel than last week, breaking a month-long trend
- BC residents' comfort with tourism activities drops
- BC continues to see weekly decrease in domestic overnight visitation compared to previous week
- 11th consecutive decrease in weekly movement in BC compared to same period in 2019
- 65% of BC residents support a temporary closing of restaurants & pubs
- Canada will remain a strong choice for international business events—later
- Updated COVID-19 Impact and Recovery Report: Travel-Related Measures
- Over 70% of American travellers plan to travel before 2022
- Almost 80% of US travellers changed their travel plans in the next six months
- 60% of global travel buyers are likely to allow business travel in 2021
- Domestic air hubs now most air-connected cities in the world
- Tourism and COVID-19 dashboard and reporting resources available

BC residents feel safer to travel than last week, breaking a month-long trend

- In Destination Canada's Wave 25 (November 24) report, the number of British Columbians that felt at least somewhat safe to travel to nearby communities increased from 59% to 65%. Feelings of safety to travel within the province also increased from the previous wave (from 43% to 47%).
- Feelings of safety travelling to other provinces or internationally remain low but also saw upticks.

British Columbia / Colombie-Britannique

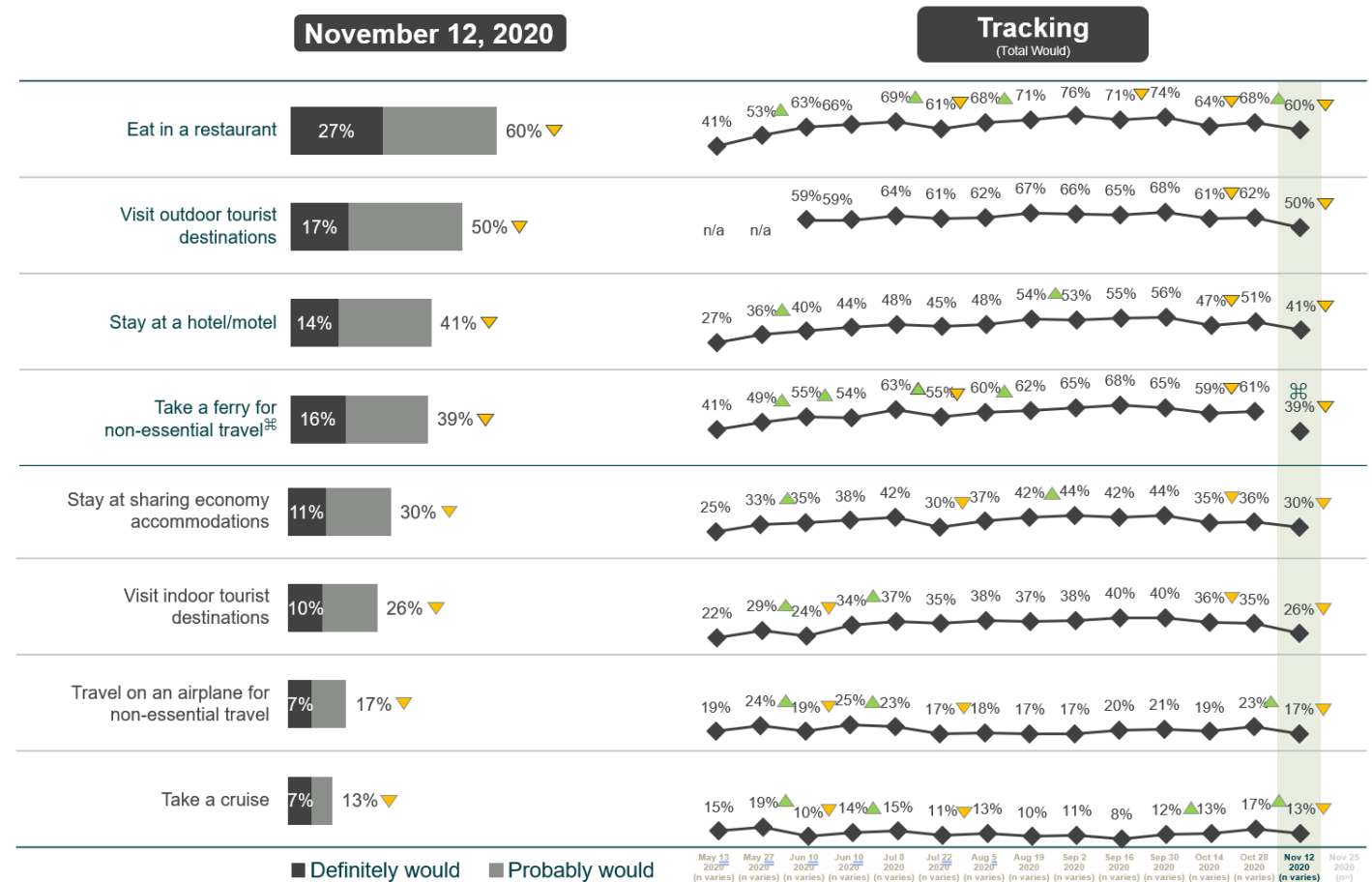
I feel safe to travel / Je me sens à l'aise de voyager



Source: [Destination Canada's Weekly Resident Sentiment, Wave 25, Leger, November 24, 2020](#)

BC residents' comfort with tourism activities drops

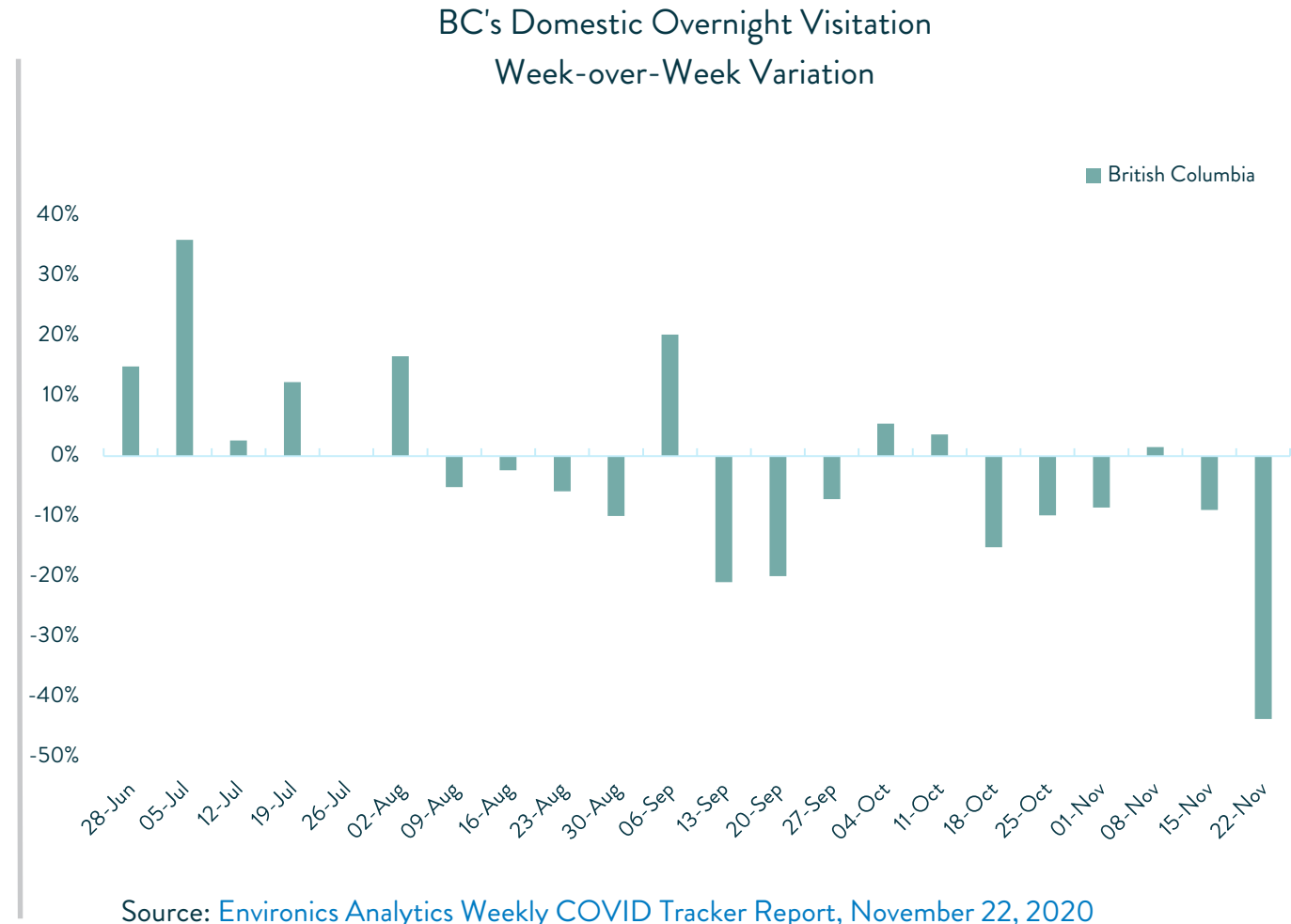
- Wave 14 (November 12) of Destination BC's BC Residents' Public Perceptions survey shows that BC residents' comfort levels with tourism activities are down across the board, with the exception of visiting a provincial park or visiting a beach and/or lake.
- This includes comfort with non-essential travel on an airplane and taking a cruise, both of which saw decreased levels of comfort from Wave 13.
- Note that the Wave 14 BC Residents' Public Perceptions survey was in field after the initial announcement from the PHO to limit social interaction and non-essential travel within and to/from Vancouver Coast Health and Fraser Health regions, and before the wider Provincial restrictions were in place on November 19.



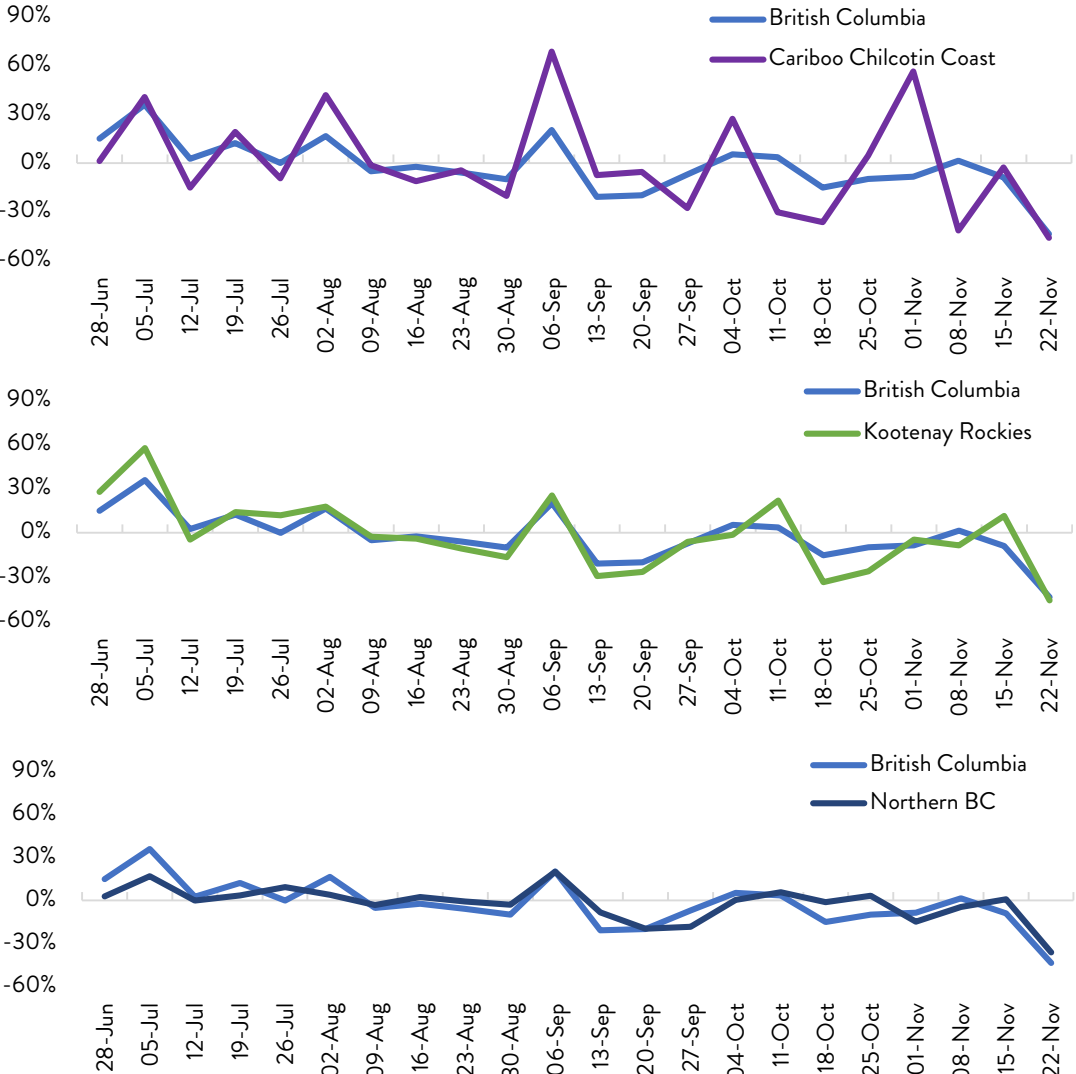
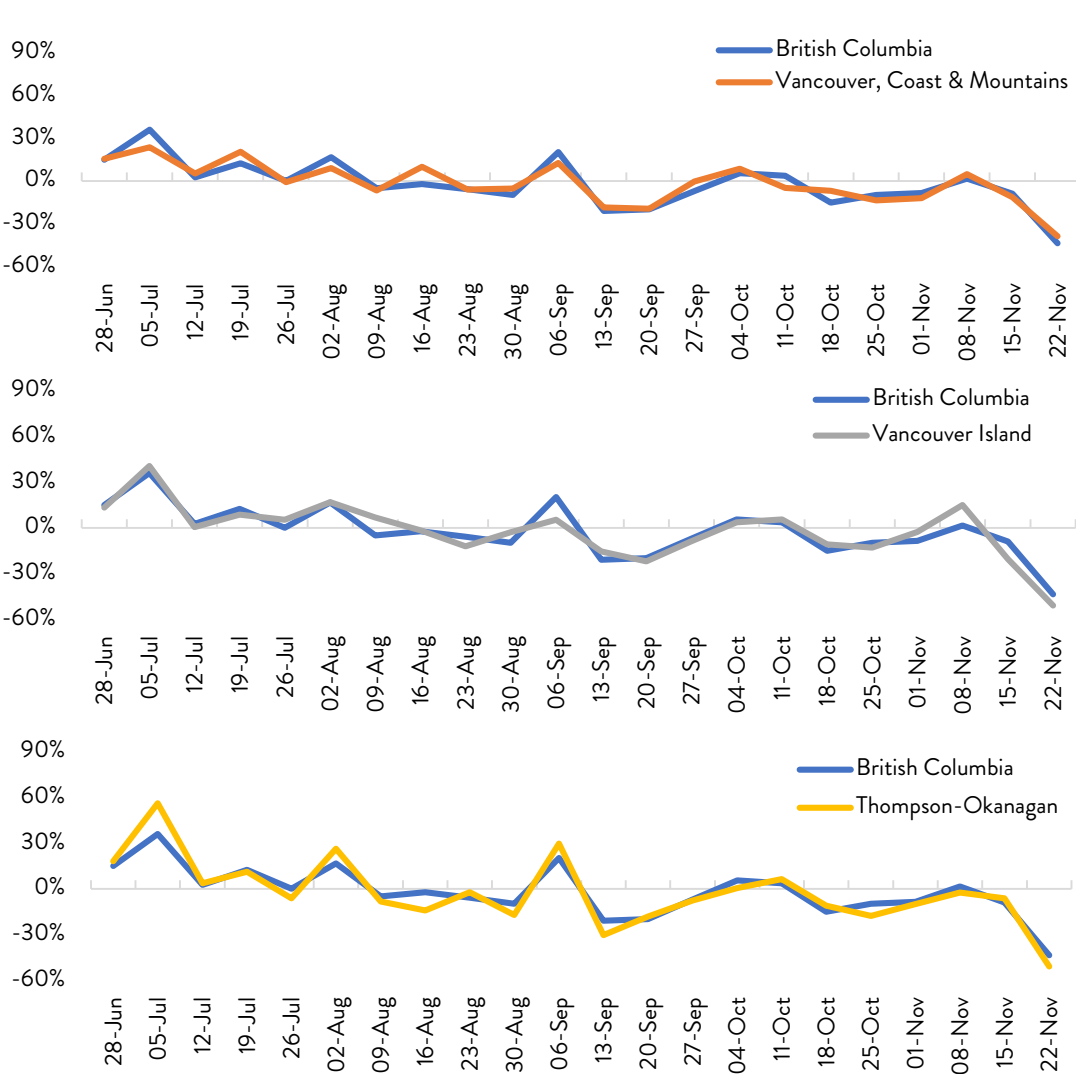
Source: [Destination BC's BC Residents' Public Perceptions: COVID-19 Travel and Tourism Wave 14, Insights West, November 12, 2020](#)

BC continues to see weekly decrease in domestic overnight visitation compared to previous week

- According to Environics Analytics Weekly COVID Tracker Report, during the week ending November 22, BC experienced a week-over-week decrease (-43.6%).
- Week-over-week decreases in movement in domestic overnight visitation were seen throughout the whole province:
 - Vancouver Island (-51.0%)
 - Thompson Okanagan (-50.9%)
 - Cariboo Chilcotin Coast (-45.9%)
 - Kootenay Rockies (-45.7%)
 - Vancouver, Coast & Mountains (-38.8%)
 - Northern BC (-36.2%)



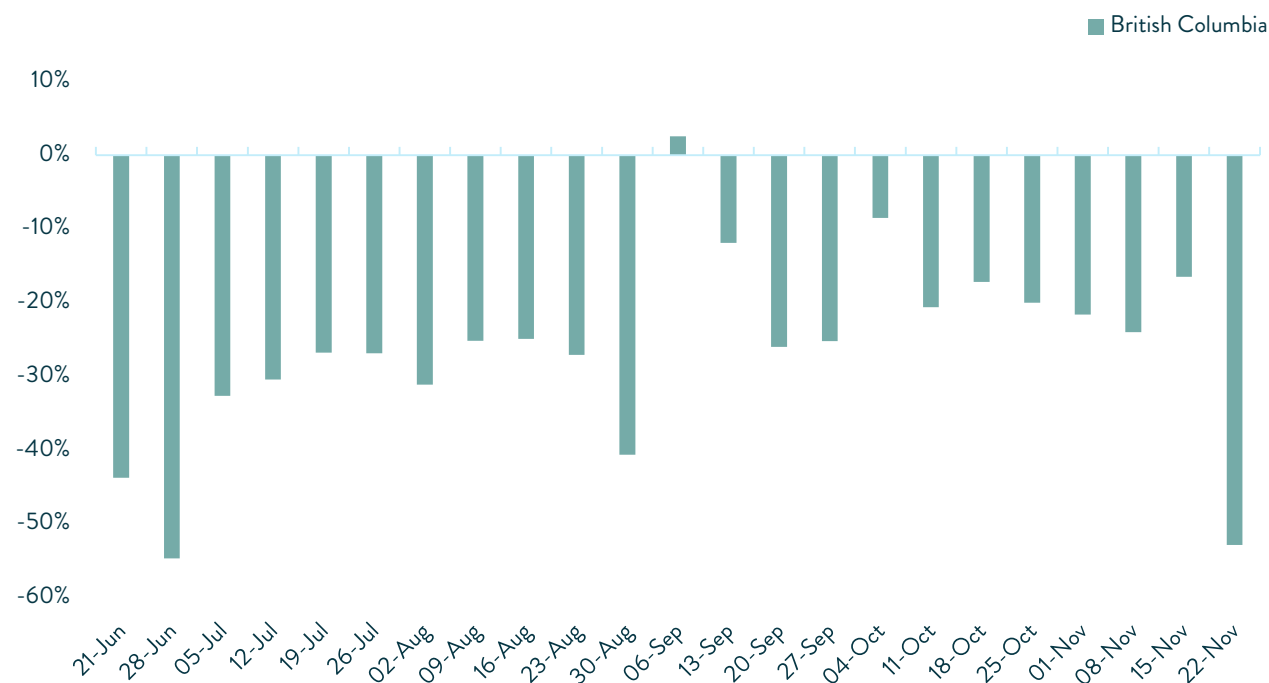
BC and Regional Domestic Overnight Visitation Week-over-Week Variation



11th consecutive decrease in weekly movement in BC compared to same period in 2019

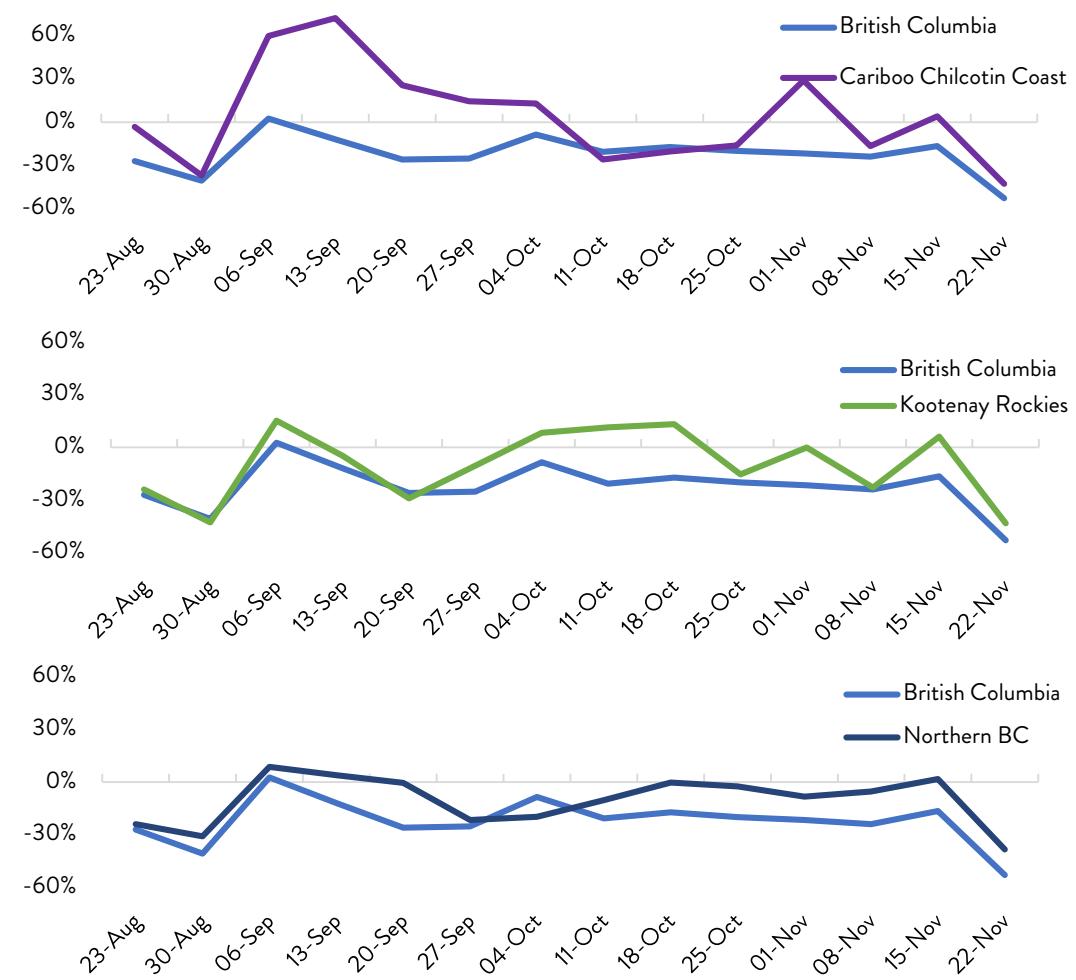
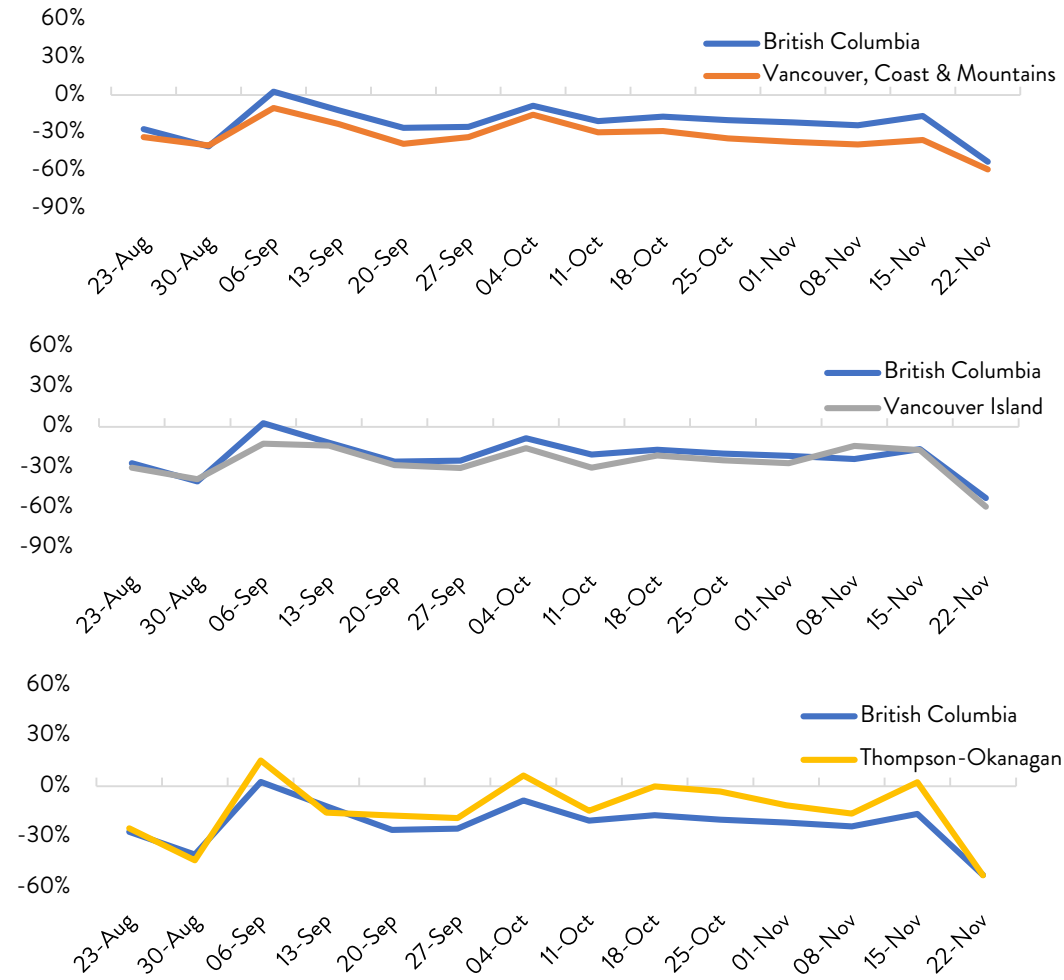
- Environics Analytics also reports year-over-year analysis in the Weekly COVID Tracker Report.
- For the eleventh consecutive week, BC's overnight domestic visitation was down (-52.9%) for the week ending November 22 compared to the same week in 2019.
- A year-over-year decrease in visitation was seen for all tourism regions:
 - Vancouver Island (-59.4%)
 - Vancouver, Coast and Mountains (-58.9%)
 - Thompson Okanagan (-53.0%)
 - Kootenay Rockies (-43.3%)
 - Cariboo Chilcotin Coast (-42.8%)
 - Northern BC (-38.3%)

BC's Domestic Overnight Visitation
Year-over-Year Percent Change



Source: [Environics Analytics Weekly COVID Tracker Report, November 22, 2020](#)

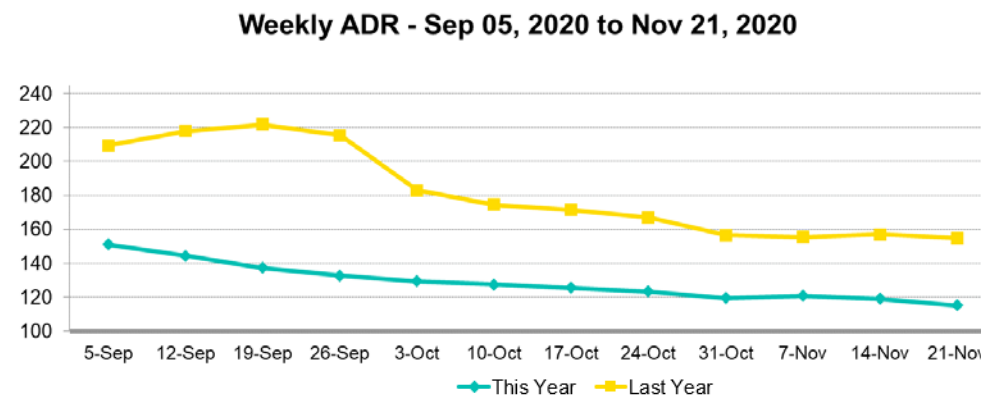
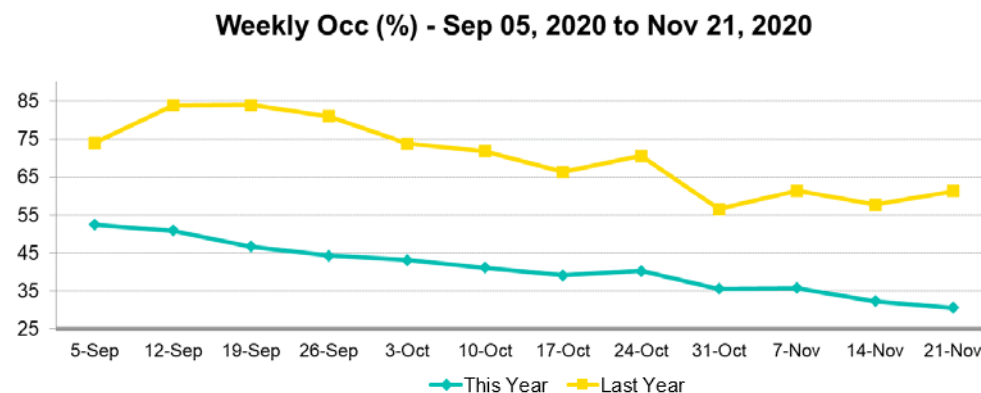
BC and Regional Domestic Overnight Visitation Year-over-Year Percent Change



Source: Environics Analytics Weekly COVID Tracker Report, November 22, 2020

Accommodation performance for BC continues to trend downward

- STR, an agency which captures BC hotel performance, shows the average weekly occupancy for BC was 30.6% for the week of November 15-21, 2020. This represents a decrease of -1.8 points from the previous week and a decrease of -30.7 points compared to the previous year.
- BC's average daily rate (ADR) was \$115.21 for the week of November 15-21, 2020. This represents a -3.5% decrease from the previous week, and a -25.5% decrease compared to a similar period in 2019.



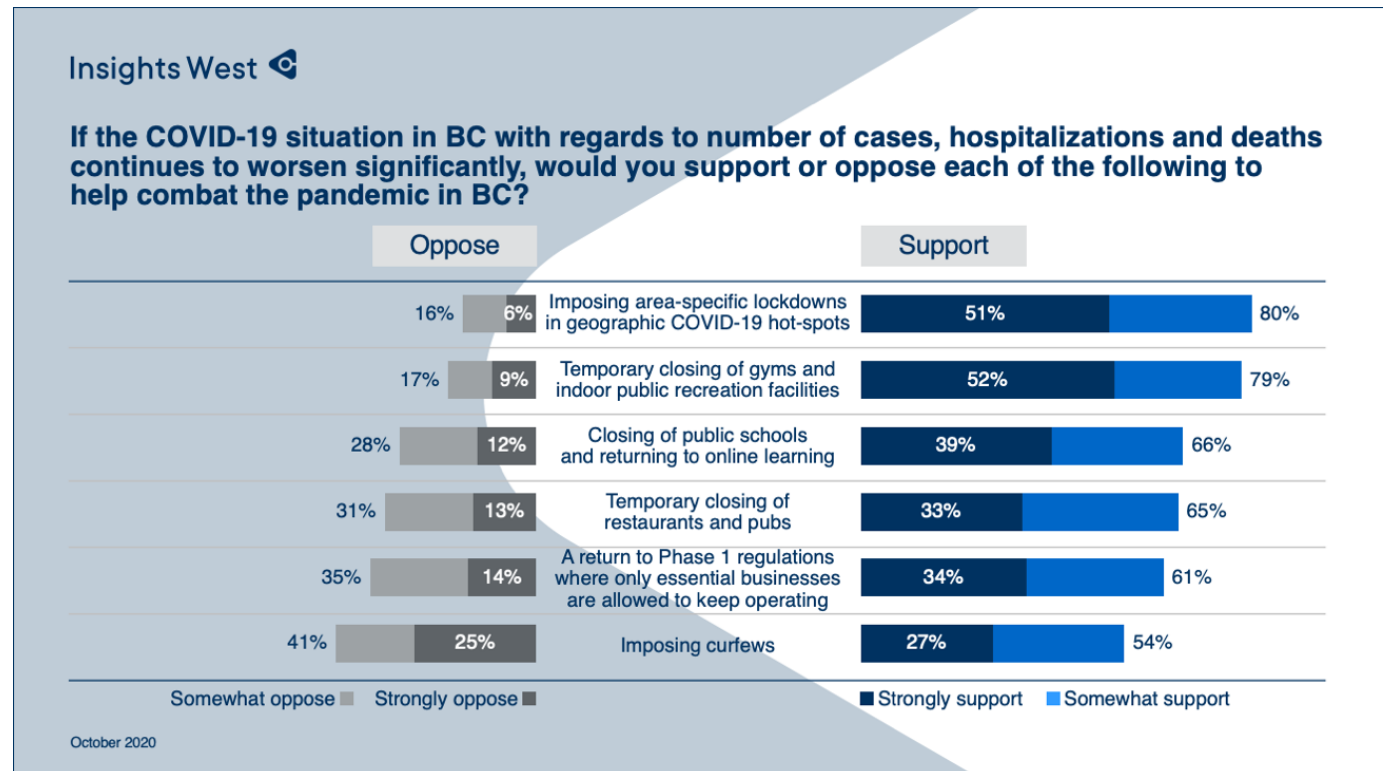
British Columbia's Hotel Occupancy Rate and Average Daily Room Rate

Source: STR Nov 15 – 21, 2020	Nov 15 – 21, 2020	Week-over-Week Nov 15 – 21, 2020 vs. Nov 8 - 14, 2020, 2020	Year-over-Year Nov 15 – 21, 2020 vs. Nov 17 - 23, 2019	Nov 15 – 21, 2020	Week-over-Week Nov 15 – 21, 2020 vs. Nov 8 - 14, 2020	Year-over Year Nov 15 – 21, 2020 vs. Nov 17 - 23, 2019
	Occupancy Rate	Occupancy Point Change	Occupancy Point Change	ADR	ADR Percent Change	ADR Percent Change
British Columbia	30.6%	-1.8	-30.7	\$115.21	-3.5%	-25.5%
Vancouver (City of)	17.2%	-2.3	-60.9	\$142.59	-0.2%	-27.3%
Whistler	12.9%	-15.6	-19.0	\$173.33	-7.0%	-9.7%
Victoria	24.1%	-7.1	-37.4	\$130.06	-6.8%	-9.9%
Kelowna	25.1%	-1.5	-31.8	\$102.75	-3.1%	-17.1%
Kamloops	44.2%	1.8	2.5	\$93.78	1.7%	-9.8%
Richmond	38.9%	-0.9	-40.6	\$122.10	0.7%	-24.4%



65% of BC residents support a temporary closing of restaurants and pubs

- A recent survey by Insights West indicates that BC residents strongly support increasingly restrictive measures to combat COVID-19.
- 80% support area-specific lockdowns for COVID-19 hotspots and 65% support a temporary closing of restaurants and pubs.

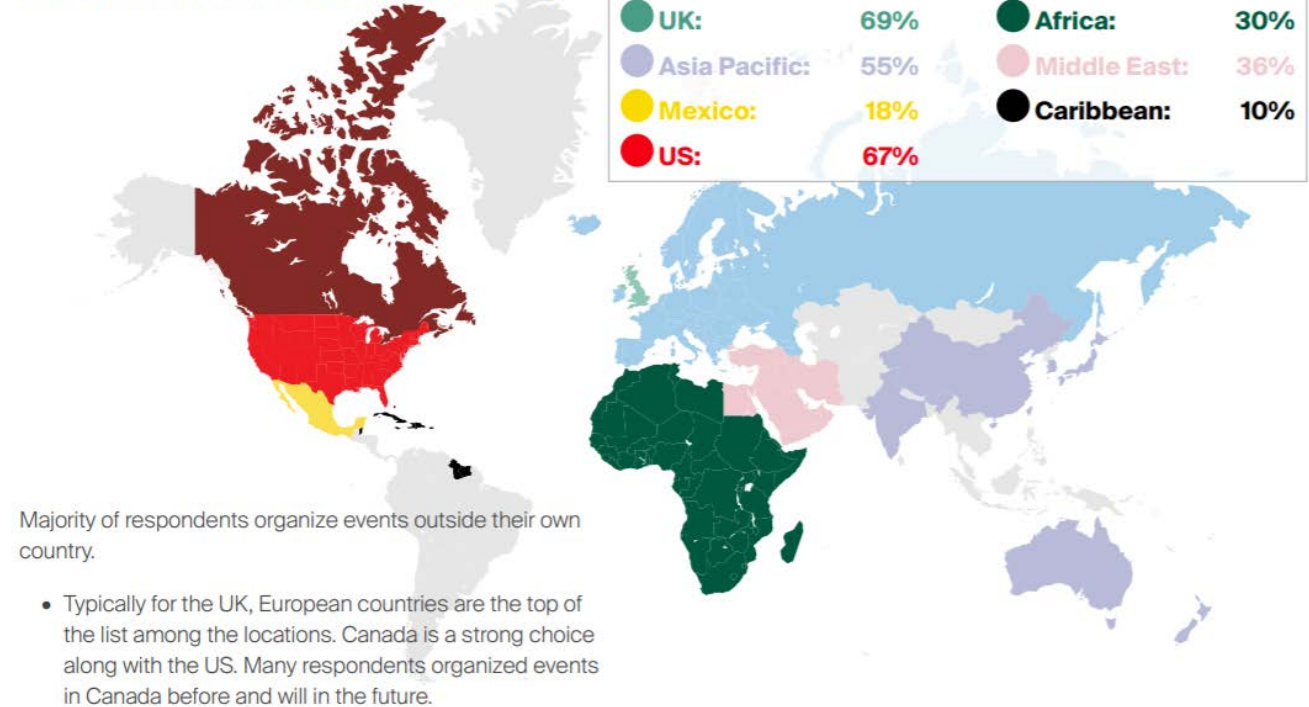


Source: [Insights West, November 7, 2020](#)

Canada will remain a strong choice for international business events—later

- Destination Canada's latest report on business events in Canada shows that Canada is a strong choice for international business events—many respondents said they have chosen Canada before and will again.
- However, uncertainty remains in international markets: UK planners intend to hold events closer to home, US associations are moving to smaller and hybrid events, and US financial sectors are looking at 2022 and beyond for events.
- Partnerships between destinations and organizations will be key and will require adapting business models and readily available packages with technology offerings.

Countries booked by organizers for international business events



Source: [Insights into the Future of Business Events in Canada, Destination Canada, November 2020](#)



Updated COVID-19 Impact and Recovery Report: Travel-Related Measures

- Destination Canada provides an evergreen assessment of the COVID-19 situation in Canada. The report is available and updated weekly to capture all travel-related measures for COVID-19 in Canada.
- A map outlining the current travel restrictions and self-isolation requirements is available on Destination Canada's website: [link](#).
- While the information included in the COVID-19 Impact and Recovery Report is updated on an ongoing basis, it should be noted that individual provincial government websites should be referred to as the official sources.

Travel Measures

	Traveller self-isolation required?	Travel restrictions?
British Columbia ^{2, 3, 4} (BC)	<p>●</p> <p>No self-isolation for domestic travellers entering BC</p>	<p>✗</p> <p>All non-resident travel to Haida Gwaii is restricted. Otherwise, no travel restrictions for domestic travellers entering BC; however, people travelling to BC from another province or territory within Canada should only come for essential reasons. As of November 7, travel into and out of the Lower Mainland and Fraser Valley should be limited to essential travel only; this limitation does not restrict travel and flights to/from BC.</p>
Alberta ⁵ (AB)	<p>●</p> <p>No self-isolation for domestic travellers entering AB. Starting November 2, eligible international travellers returning to Alberta at the Calgary International Airport or Coutts land border crossing can participate in a pilot program that will allow them to quarantine for less time (approximately 48 hours) provided they test negative for COVID-19 and if they commit to following specific public health and testing measures.</p>	<p>●</p> <p>No travel restrictions for domestic travellers entering AB</p>
Saskatchewan (SK)	<p>●</p> <p>No self-isolation for domestic travellers entering SK</p>	<p>●</p> <p>No travel restrictions for domestic travellers entering SK</p>
Manitoba ⁶ (MB)	<p>✗</p> <p>Residents of Western Canada and Northwestern Ontario do not need to self-isolate for 14 days when entering MB; 14-day self-isolation for all other domestic travellers entering MB, except for essential workers.</p>	<p>✗</p> <p>No travel restrictions for domestic travellers entering MB, but self-isolation required (except for residents of Western Canada and Northwestern Ontario). Travel to and from northern Manitoba is restricted and non-essential travel is discouraged.</p>



Source: [Destination Canada, November 2020](#)

Over 70% of American travellers plan to travel before 2022

- Destination Analysts, a US-based tourism research company, shows that over 70% of American travellers plan to travel before 2022.
- Of the nearly 30% of American travellers who have no plans to travel before 2021, almost 9% of US travellers have no travel plans until after 2022 and another 18% have no plans to travel in the future.
- Over 60% said Pfizer's vaccine announcement made them more or much more optimistic that they can travel safely in 2021.



QUESTION: EVEN IF ONLY TENTATIVELY SCHEDULED, IN WHICH MONTHS OF THIS YEAR DO YOU CURRENTLY PLAN TO TAKE ANY LEISURE TRIPS?

(Base: Wave 37 data. All respondents, 1,205 completed surveys. Data collected Nov 20-22, 2020)

Destination  Analysts
DO YOUR RESEARCH



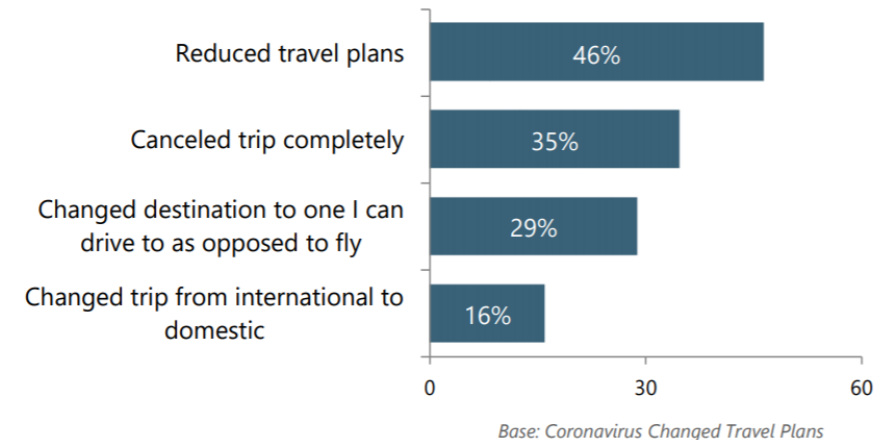
Source: [Destination Analysts, November 23, 2020](#)

Almost 80% of US travellers changed their travel plans in the next six months

- A new survey of US citizens by Longwoods International shows that 77% of travellers planning to travel in the next six months will change their plans due to COVID-19.
- 46% of these respondents reduced their travel plans, while 35% cancelled their trip completely.



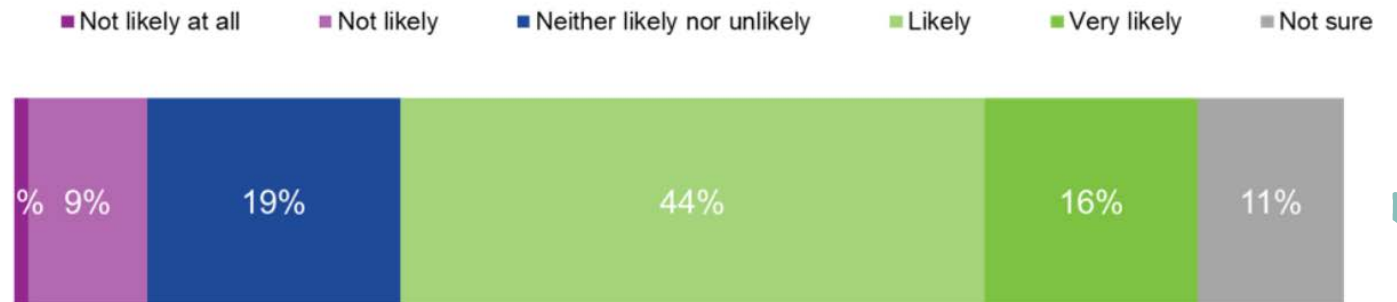
of travelers planning to travel in the next six months will change their travel plans due to coronavirus



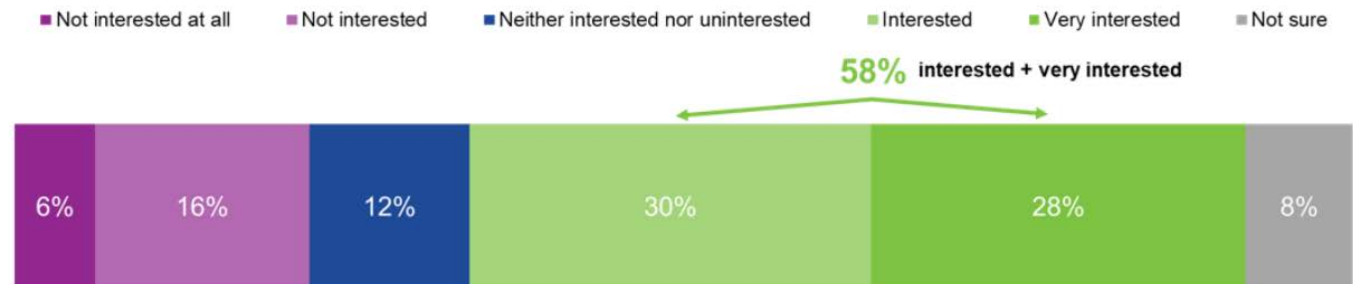
60% of global travel buyers are likely to allow business travel in 2021

- The Global Business Travel Association's semi-weekly poll tracks the impact of COVID-19 on the business travel industry. The November 19 Coronavirus Poll report showed that 60% of members surveyed, companies of travel buyers and procurement professionals, are likely or very likely to allow business travel and in-person meetings in 2021 based on recent vaccine news.
- 58% are at least interested in quarantine exemptions for some international business trips.

Based on recent vaccine news, are travel programs more likely to allow business travel and in-person meetings in 2021?



Are respondents interested in quarantine exemptions for some international business trips?



Source: [2020 Coronavirus Poll, Global Business Travel Association, November 19, 2020](#)

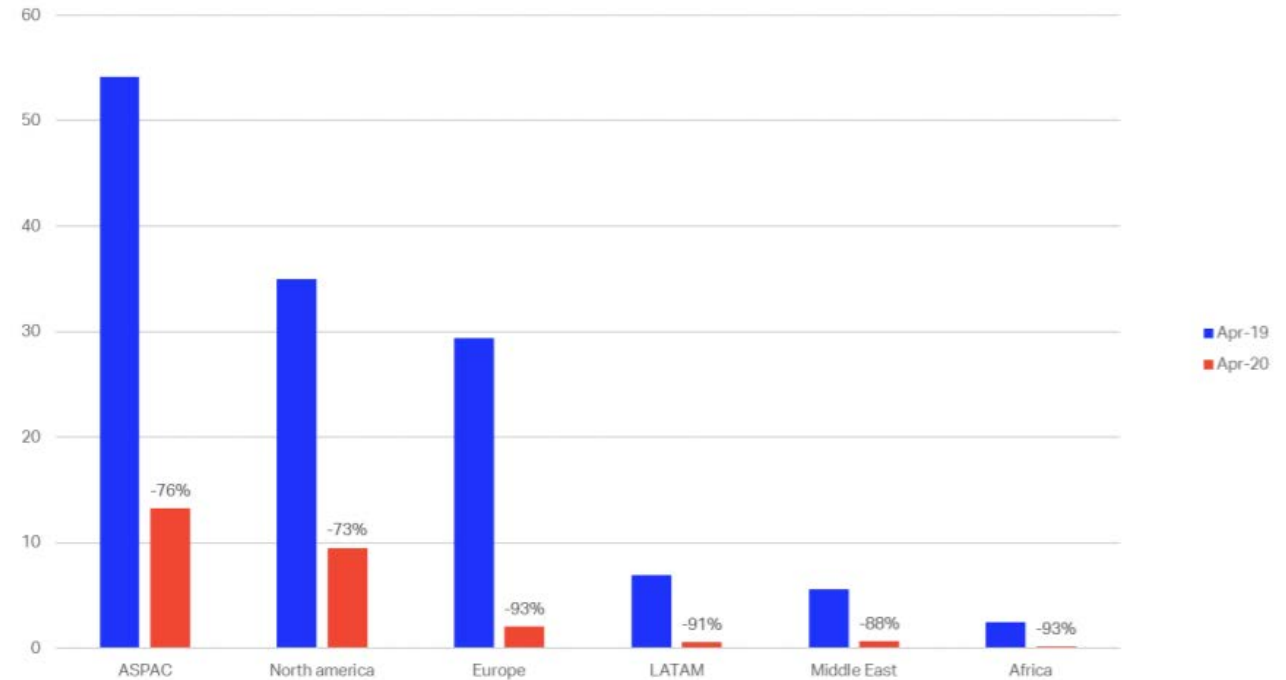


Domestic air hubs now most air-connected cities in the world

- A new report by the International Air Transport Association shows big changes in air connectivity. International destinations no longer dominate, with domestic hubs rising.
- London, the world's number one most connected city in September 2019, has declined by -67% in connectivity. It is now 8th.
- Shanghai is the new top city for connectivity. The top four most connected cities are in China: Shanghai, Beijing, Guangzhou and Chengdu.
- New York (-66% fall in connectivity), Tokyo (-65%), Bangkok (-81%), Hong Kong (-81%) and Seoul (-69%) are no longer in the top ten.

ES 1: Global air connectivity disruption due to COVID-19

Destination-weighted seats (in millions)



Source: IATA Economics

Source: [Travel Press, November 26, 2020](#) and [IATA, November 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

Research & Analytics
TourismResearch@DestinationBC.ca