



DESTINATION
BRITISH COLUMBIA®

COVID-19 Research Roundup

December 7, 2020

Great Northern Rail Trail, Kootenay Rockies

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, the Province is urging all British Columbians to press pause on all non-essential travel and stay in their local community. Some insights noted in this Research Roundup were gathered prior to this announcement by BC's Provincial Health Officer, Dr Bonnie Henry, originally given on November 19, and reinforced on December 7.





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:

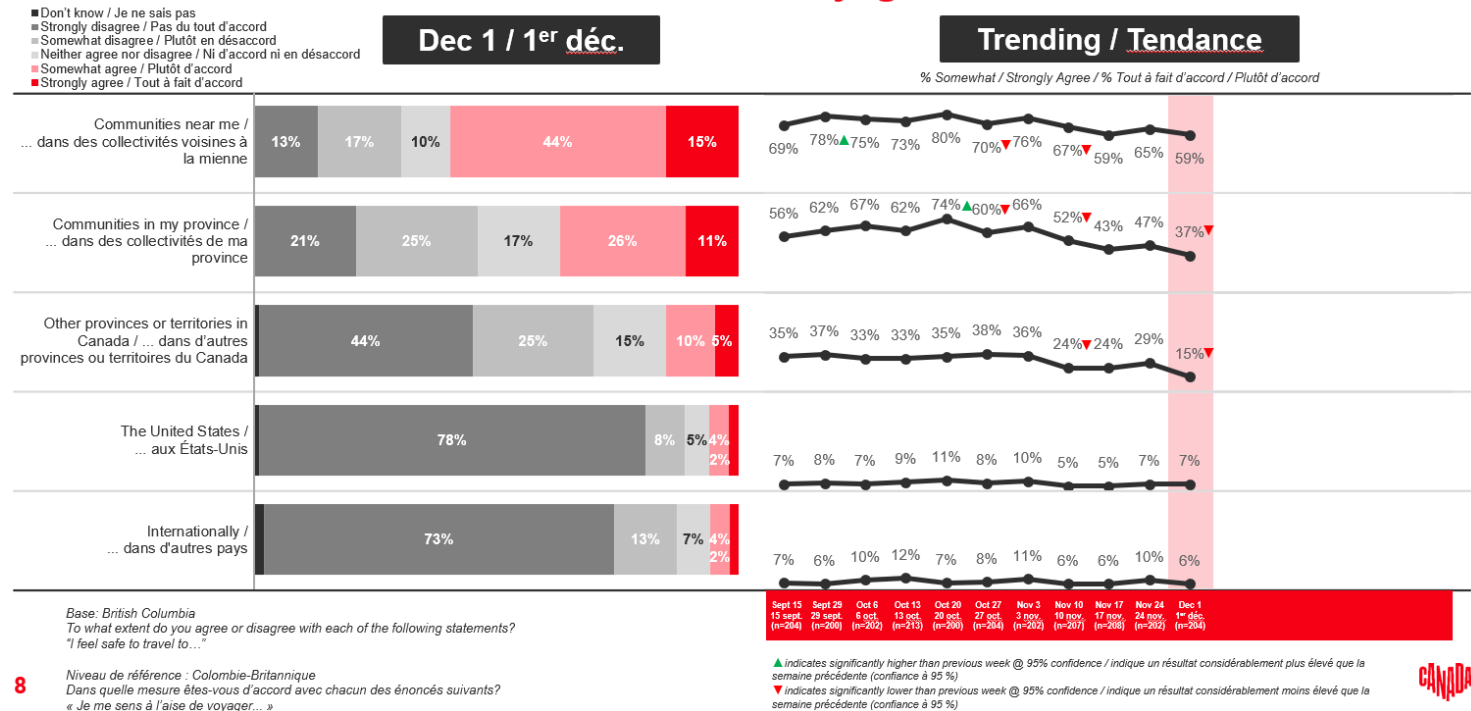
- BC residents' feelings of safety to travel lowest since September
- BC residents' intentions toward domestic travel remain stable, but are up for international travel
- BC continues to see weekly decrease in domestic overnight visitation compared to previous week
- Decrease in weekly movement in BC compared to same period in 2019 similar to early-May decreases
- Airline bookings in BC down almost a third since last week
- BC accommodation performance down from previous week
- BC's November accommodation performance down -28.3% from 2019
- 45% of Canadians are afraid of being exposed to COVID-19 at holiday gatherings
- American travellers continue to be less open to travel inspiration
- COVID-19 the largest concern in the world for the 8th consecutive month
- Tourism and COVID-19 dashboard and reporting resources available

BC residents' feelings of safety to travel lowest since September

- In Destination Canada's Wave 26 (December 1) report, the number of British Columbians that felt at least somewhat safe to travel to nearby communities decreased to 59% from 65% in Wave 25. Feelings of safety to travel within the province dropped down to 37% from 47% in Wave 25, the lowest rate of feelings of safety reported since the tracking of this question began in September.
- Feelings of safety travelling to other provinces within Canada decreased as well, 15% from 29% in Wave 25. Feelings of safety travelling to other provinces within Canada is the lowest reported since tracking began in September.

British Columbia / Colombie-Britannique

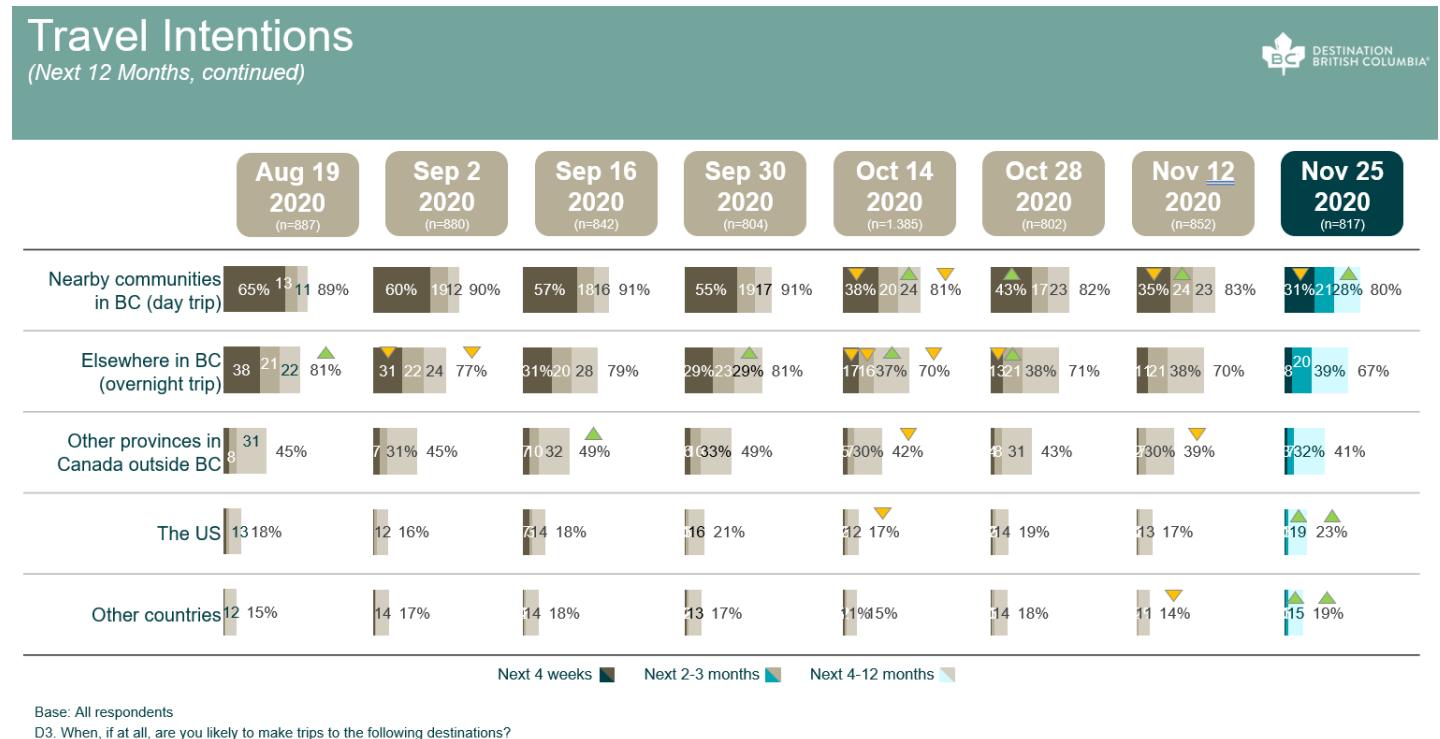
I feel safe to travel / Je me sens à l'aise de voyager



Source: [Destination Canada's Weekly Resident Sentiment, Wave 26, Leger, December 1, 2020](#)

BC residents' intentions toward domestic travel remain stable, but are up for international travel

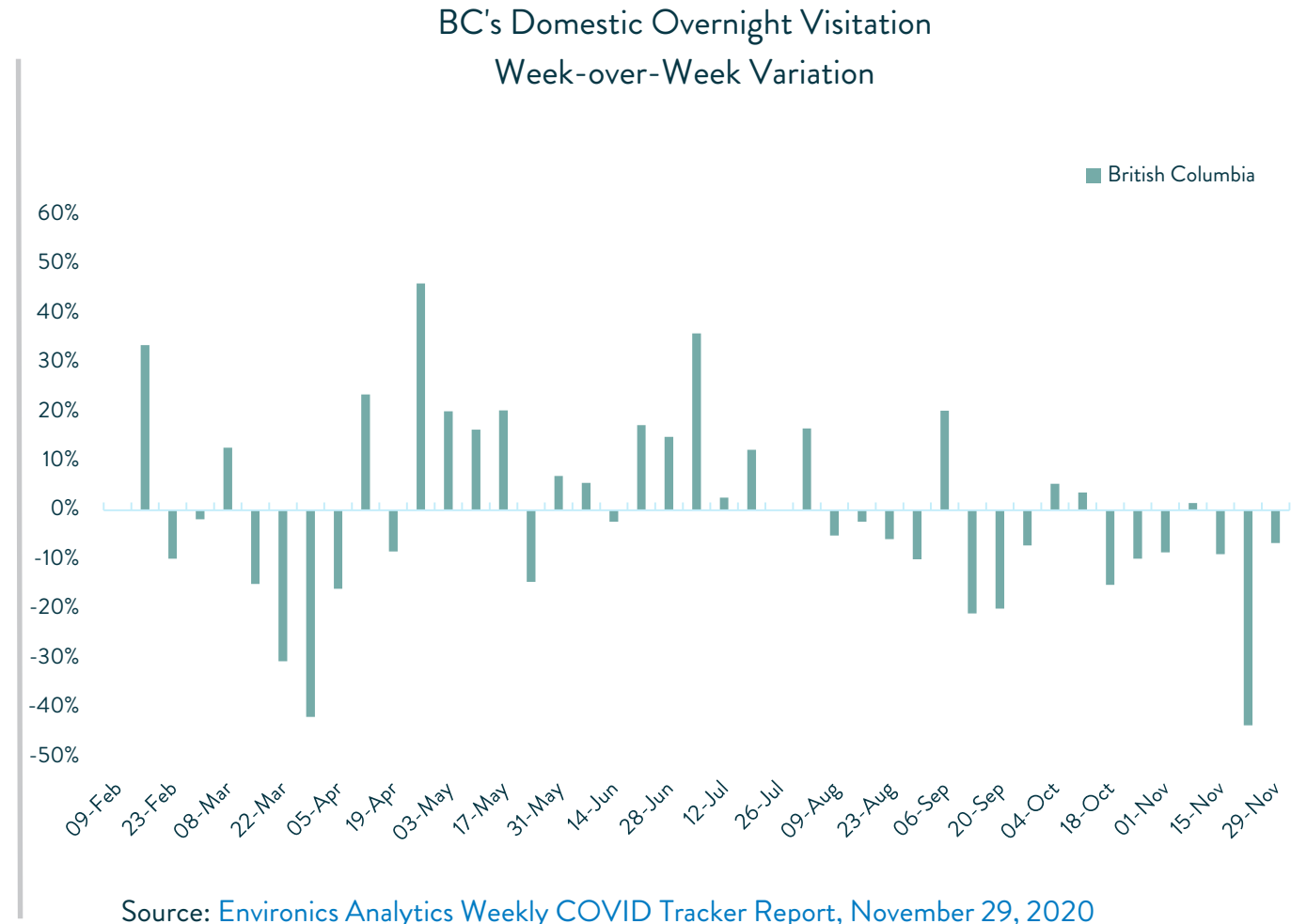
- Wave 15 (November 25) of Destination BC's BC Residents' Public Perceptions survey shows that BC residents' travel intentions in the next 4 weeks are down, while remaining relatively stable in the next 12 months for domestic travel.
- The biggest change in this wave is for international travel. Intentions to travel to the US in the next 12 months increased from 17% in Wave 14 to 23% in Wave 15 and intentions to travel to other countries increased from 14% to 19%.



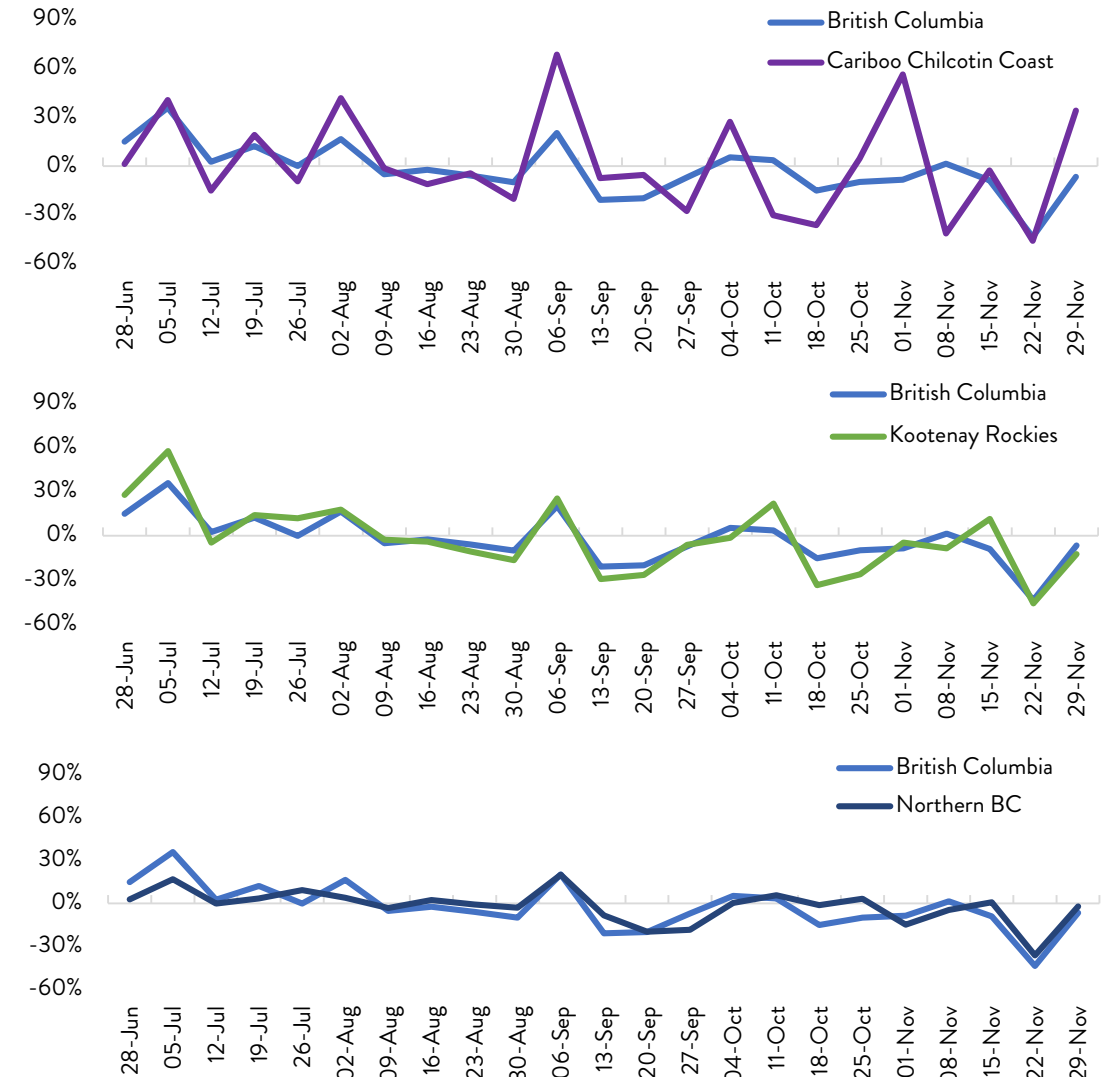
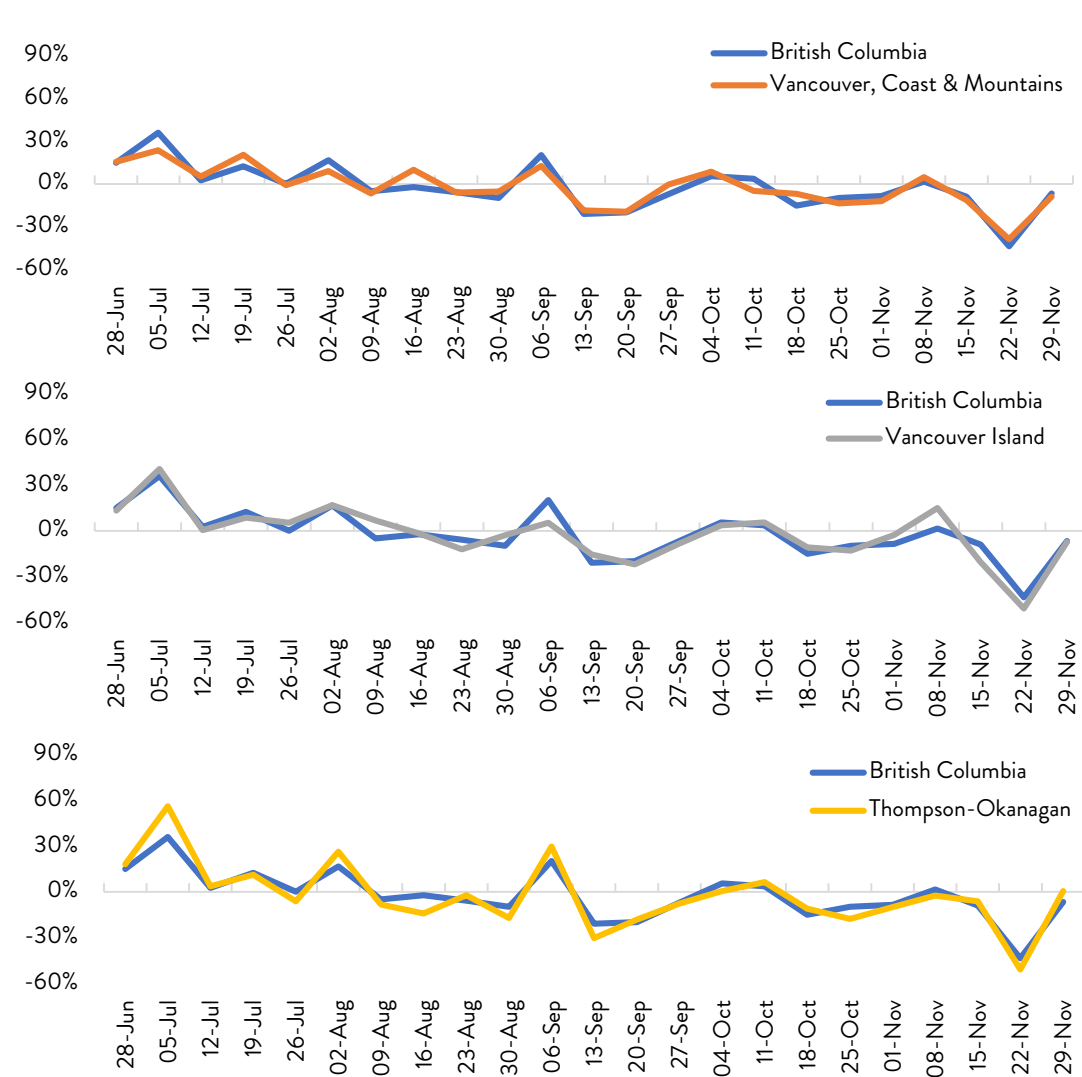
Source: [Destination BC's BC Residents' Public Perceptions: COVID-19 Travel and Tourism Wave 15, Insights West, November 25, 2020](#)

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 29, BC experienced a week-over-week decrease (-6.6%).
- Week-over-week decreases in movement in domestic overnight visitation were seen mostly throughout the province:
 - Kootenay Rockies (-12.4%)
 - Vancouver Island (-7.4%)
 - Vancouver, Coast & Mountains (-6.6%)
 - Northern BC (-2.1%)
- However, week-over-week increases in domestic overnight visitation were seen in the Cariboo Chilcotin Coast (+34.0%) and the Thompson Okanagan (+0.5%).

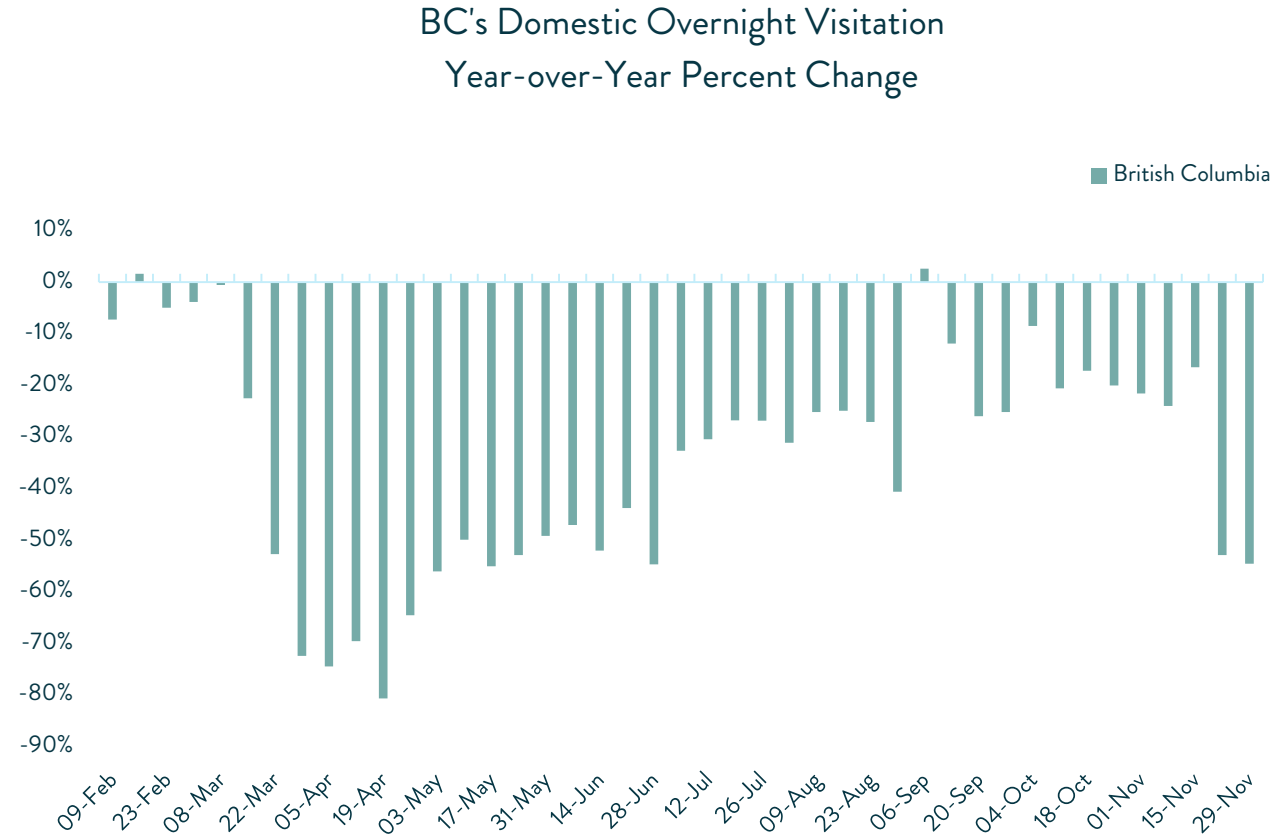


BC and Regional Domestic Overnight Visitation Week-over-Week Variation



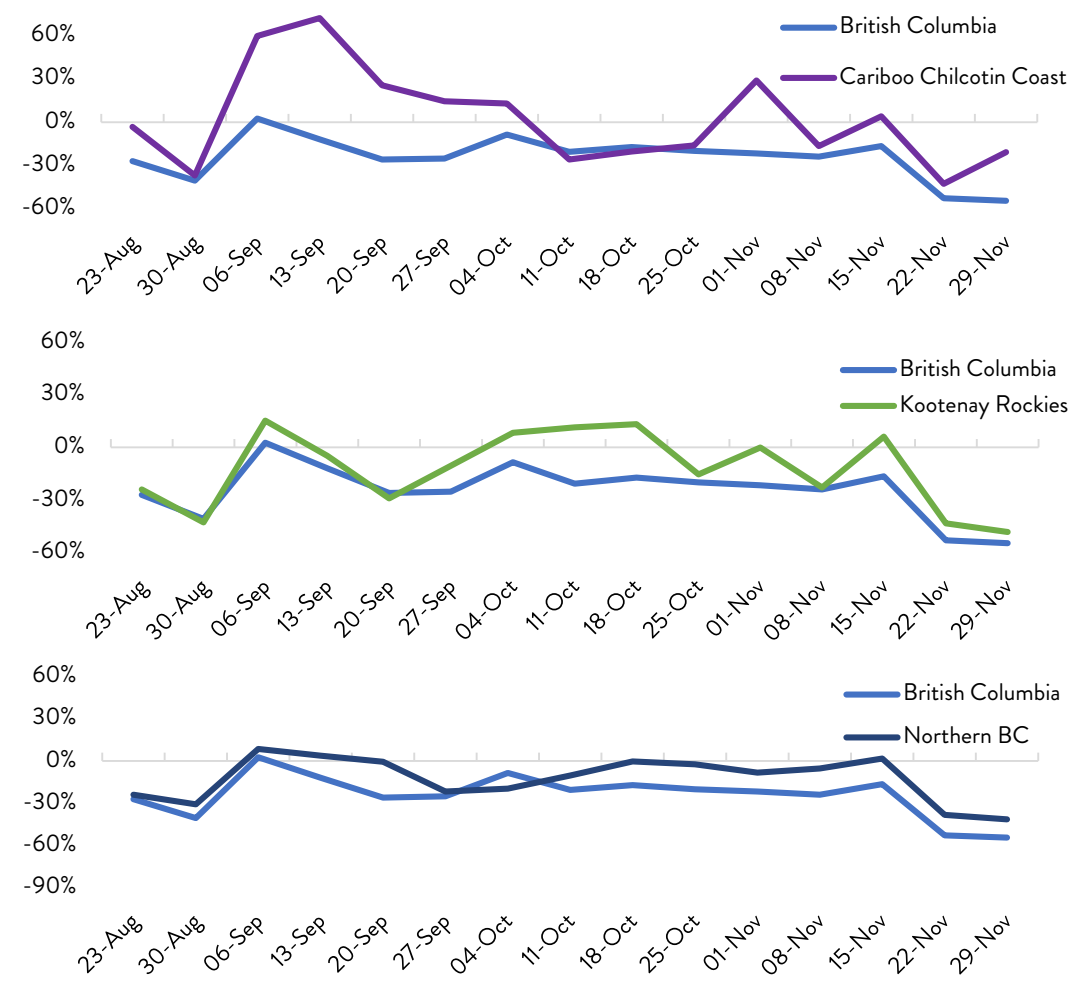
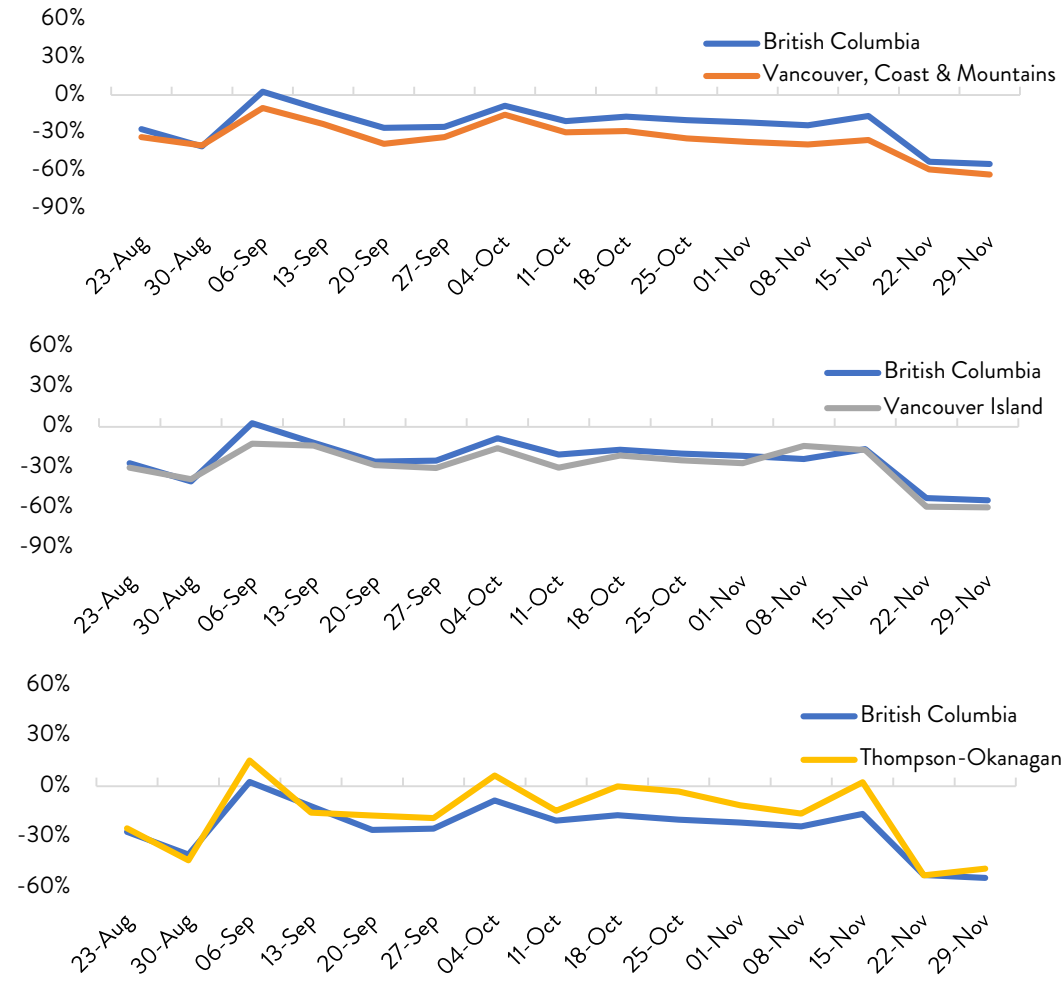
Decrease in weekly movement in BC compared to same period in 2019 similar to early-May decreases

- Environics Analytics also reports year-over-year analysis in the Weekly COVID Tracker Report.
- For the twelfth consecutive week, BC's overnight domestic visitation was down (-54.6%) for the week ending November 29 compared to the same week in 2019. This is the greatest decrease in movement seen in 2020 since early May.
- A year-over-year decrease in visitation was seen for all tourism regions:
 - Vancouver, Coast & Mountains (-62.9%)
 - Vancouver Island (-59.9%)
 - Thompson Okanagan (-49.1%)
 - Kootenay Rockies (-48.2%)
 - Northern BC (-41.6%)
 - Cariboo Chilcotin Coast (-20.8%)



Source: [Environics Analytics Weekly COVID Tracker Report, November 29, 2020](#)

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



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

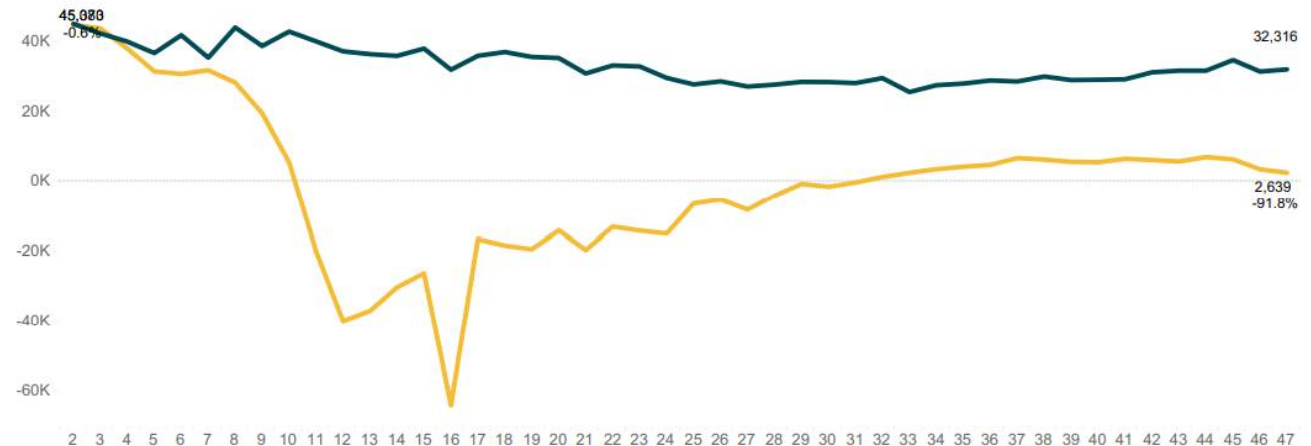
Airline bookings in BC down almost a third since last week

- ForwardKeys, a flight analysis company, has shown that during the week of November 16, 2020, there were 2,639 airline bookings made within BC. This is a decrease of -91.8% from the same time period last year.
- 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

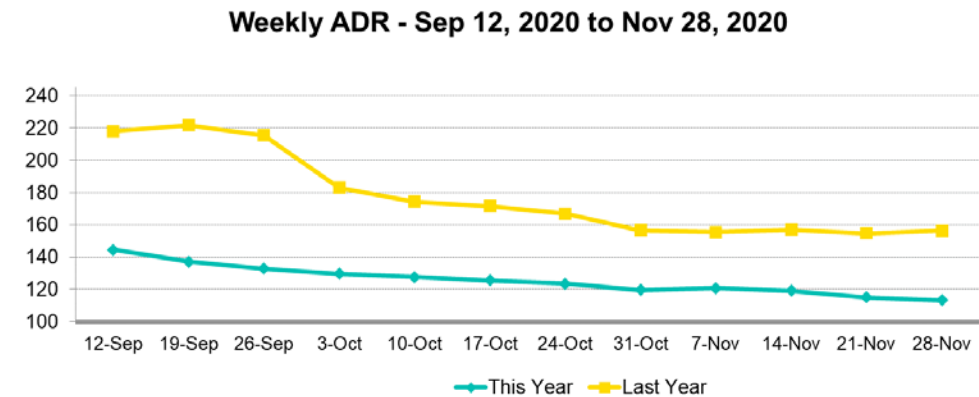
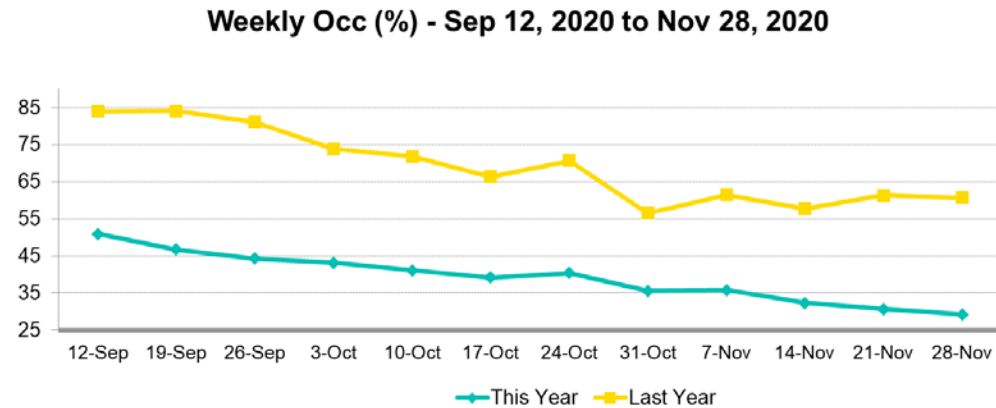
Bookings Made to BC by Week; negative values indicate more cancellations than bookings in a given week. Please hover over data points to see more information. Source: ForwardKeys



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

BC accommodation performance down from previous week

- STR, an agency which captures BC hotel performance, shows the average weekly occupancy for BC was 29.2% for the week of November 22-28, 2020. This represents a decrease of -1.4 points from the previous week and a decrease of -31.4 points compared to a similar period in 2019.
- BC's average daily rate (ADR) was \$113.30 for the week of November 22-28, 2020. This represents a -1.7% decrease from the previous week, and a -27.6% 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 22 - 28, 2020	Nov 22 - 28, 2020	Week-over-Week Nov 22 - 28, 2020 vs. Nov 15 - 21, 2020, 2020	Year-over-Year Nov 22 - 28, 2020 vs. Nov 24 - 30, 2019	Nov 22 - 28, 2020	Week-over-Week Nov 22 - 28, 2020 vs. Nov 15 - 21, 2020	Year-over Year Nov 22 - 28, 2020 vs. Nov 24 - 30, 2019
	Occupancy Rate	Occupancy Point Change	Occupancy Point Change	ADR	ADR Percent Change	ADR Percent Change
British Columbia	29.2%	-1.4	-31.4	\$113.30	-1.7%	-27.6%
Vancouver (City of)	16.0%	-1.1	-58.5	\$136.69	-4.1%	-29.1%
Whistler	13.0%	+0.1	-39.5	\$192.02	+10.8%	-32.1%
Victoria	20.2%	-3.9	-44.9	\$125.61	-3.4%	-14.6%
Kelowna	22.4%	-2.6	-27.8	\$102.12	-0.6%	-17.0%
Kamloops	43.6%	-0.6	+0.6	\$90.14	-3.9%	-12.9%
Richmond	38.2%	-0.7	-33.7	\$121.33	-0.6%	-20.2%



BC's November accommodation performance down -28.3% from 2019

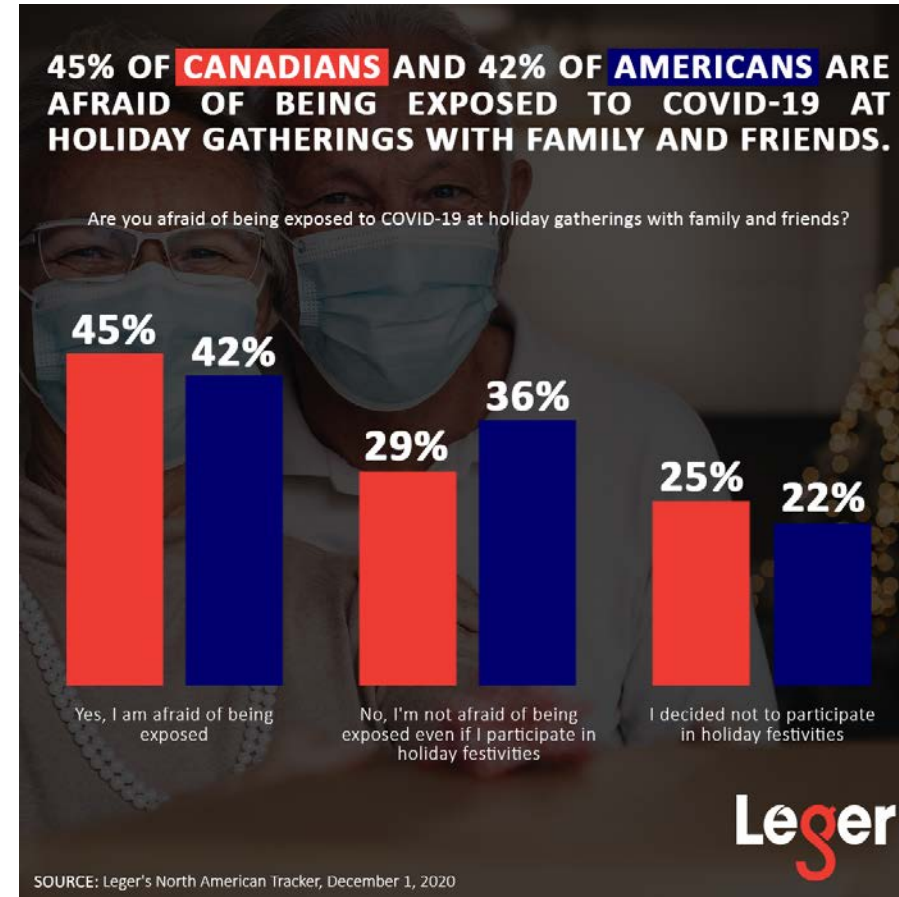
- STR, an agency which captures BC hotel performance, shows the average monthly occupancy for BC was 32% for the month of November 2020. This represents a decrease -28.3 points compared to November 2019.
- The monthly ADR for BC was \$117.28, a -24.8% decrease compared to the previous year.

Destination	November 2020 Hotel Occupancy Rate	Point Change (over similar 2019 period)
British Columbia Overall	32.0%	-28.3
Vancouver (City of)	18.8%	-56.2
Whistler	20.5%	-16.9
Victoria	27.0%	-35.5
Kelowna	26.0%	-27.8
Kamloops	45.0%	+3.3
Richmond	39.0%	-37.4



45% of Canadians are afraid of being exposed to COVID-19 at holiday gatherings

- A recent study by Leger shows that 45% of Canadians and 42% of Americans are afraid of being exposed to COVID-19 at holiday gatherings with family and friends.
- 71% of Canadians and 51% of Americans have changed their holiday plans due to the COVID-19 situation.
- 60% of Canadians support a total ban on holiday gatherings (except with those in the same household). 42% of Americans support a ban, while 41% do not.



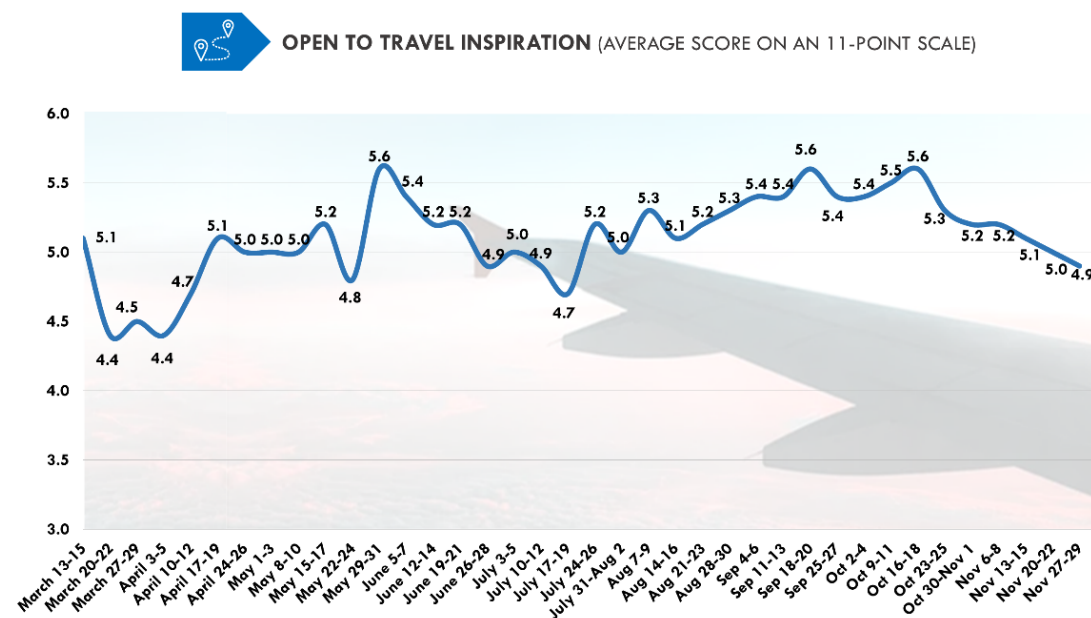
Source: [Leger, December 1, 2020](#)

American travellers continue to be less open to travel inspiration

- Destination Analysts, a US-based tourism research company, found in a recent survey that Americans' openness to travel inspiration has been on a steady decline since a recent peak on October 18 (5.6 on a 0-11 scale), but is now at 4.9 on a 0-11 scale.
- This week, half of American travellers say they have lost interest in travelling for the time being, and 62% say if they were to travel right now, they wouldn't be able to fully enjoy it.

OPENNESS TO TRAVEL INSPIRATION

MARCH 13 – NOVEMBER 29



QUESTION: AT THIS MOMENT, HOW INTERESTED ARE YOU IN LEARNING ABOUT NEW, EXCITING TRAVEL EXPERIENCES OR DESTINATIONS TO VISIT?

(Base: Waves 1-38. All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214, 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, 1,205, 1,206, 1,205 and 1,205 completed surveys.)

Destination  Analysts
DO YOUR RESEARCH

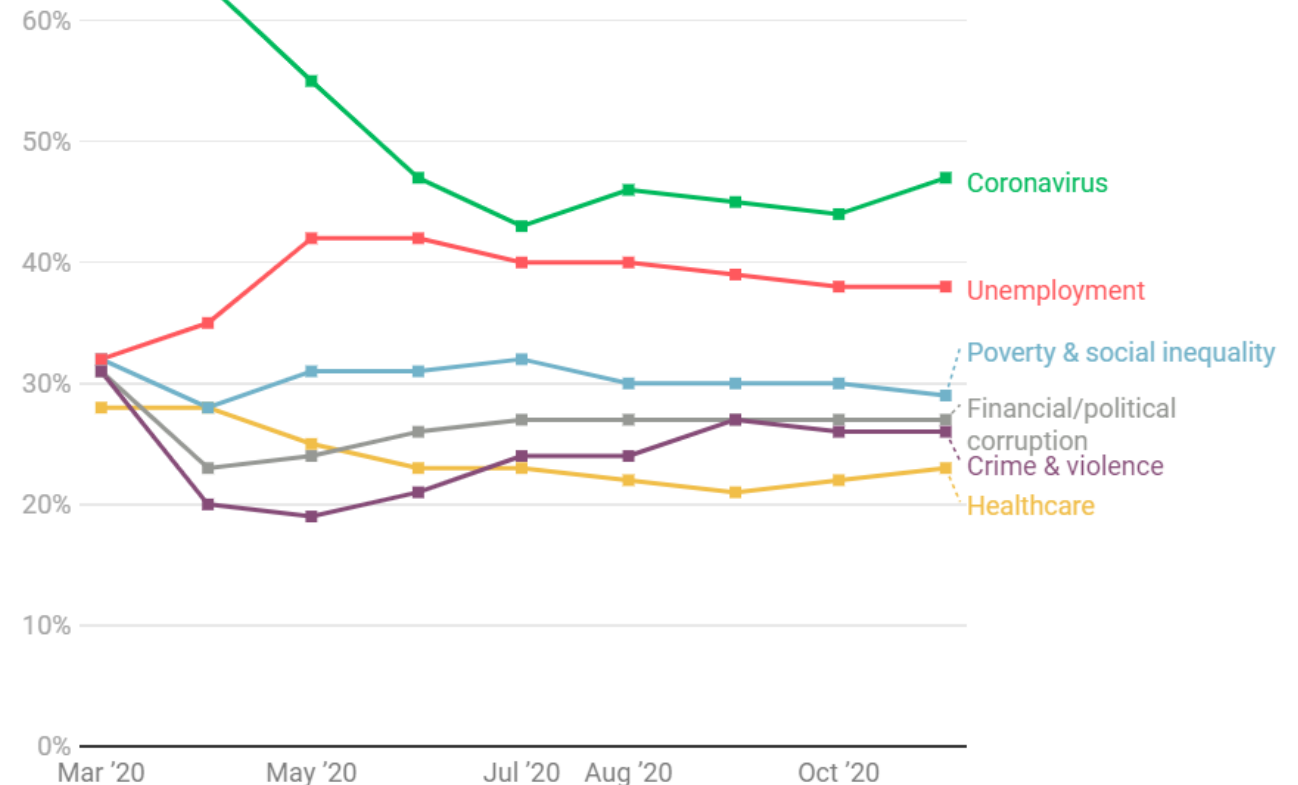
Source: [Destination Analysts, November 29, 2020](#)



COVID-19 the largest concern in the world for the 8th consecutive month

- According to a survey by Ipsos, COVID-19 is the world's biggest concern for the eighth month in a row. In addition, almost two-thirds of the 27 nations surveyed say that generally "things in their country are on the wrong track".

Top global concerns



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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