

COVID-19 Research Roundup

December 14, 2020

Furry Creek, Vancouver, Coast & Mountains

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 December 11, 2020, Canadian and US officials agreed to extend the closure of the border between the two countries to non-essential travel until at least January 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:

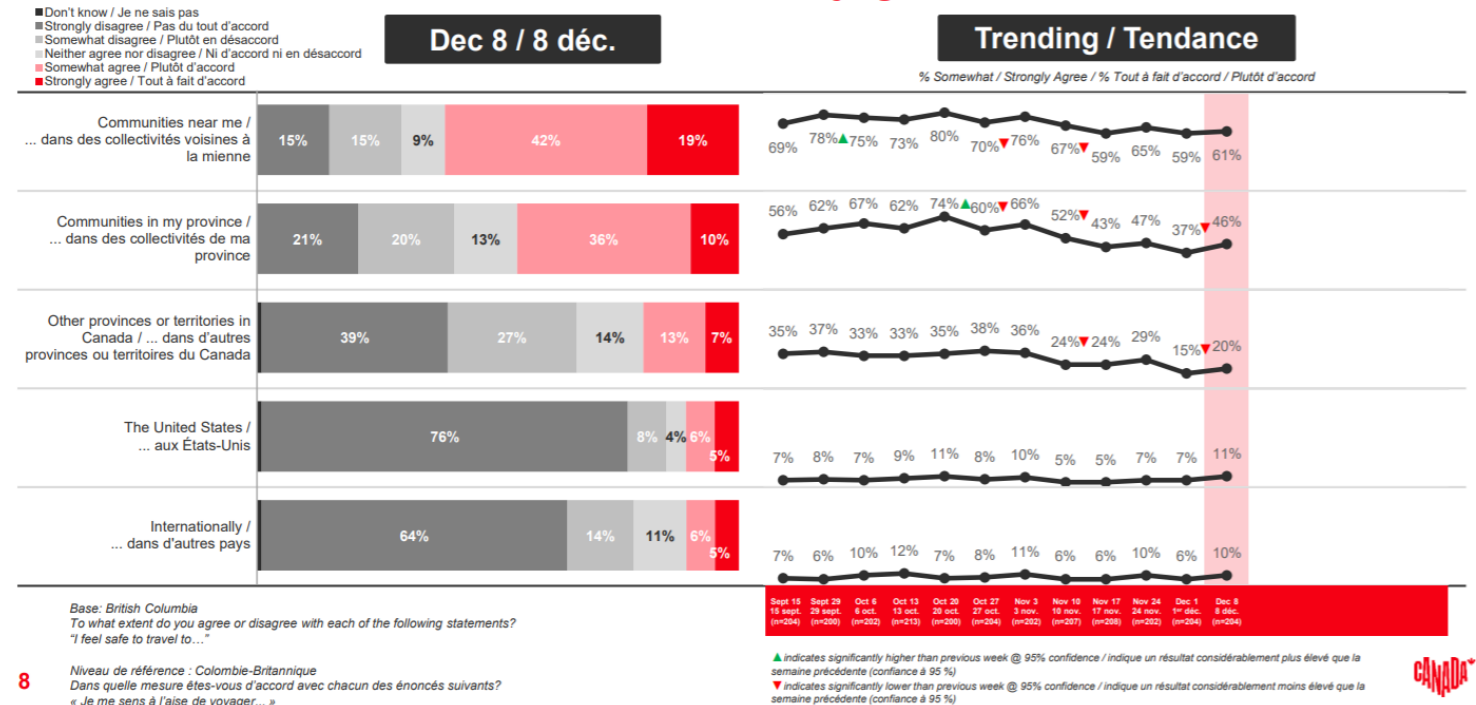
- BC residents' feelings of safety while travelling are up after a sharp downturn
- BC residents' comfort with tourism activities is down
- BC sees weekly increase in domestic overnight visitation compared to previous week
- For over 3 months, decreases in weekly movement in BC are seen compared to same periods in 2019
- BC accommodation performance decline slows from previous weeks
- Over a third of British Columbians do not intend to travel abroad without a vaccine
- CLIA estimates that, for each day that cruises are suspended, 100 Canadian jobs are lost
- 50% of US travellers are optimistic/very optimistic that they will be able to take a cruise in 2021
- Destination Canada forecasts that full recovery could occur anywhere between 2024 and 2026
- Most American travellers travelled in 2020 and expect to take 3 trips in 2021
- Domestic air traffic is already in recovery, while international to increase in 2021
- Tourism and COVID-19 dashboard and reporting resources available

BC residents' feelings of safety while travelling are up after a sharp downturn

- In Destination Canada's Wave 27 (December 8) report, the number of British Columbians that felt at least somewhat safe to travel to nearby communities increased by +2 points to 61%. Feelings of safety to travel within the province increased from 37% to 46%.
- Feelings of safety travelling to other provinces within Canada increased as well, up to 20% from 15% in Wave 26. Feelings of safety travelling to the US and internationally increased as well, up to 11% and 10%, respectively.

British Columbia / Colombie-Britannique

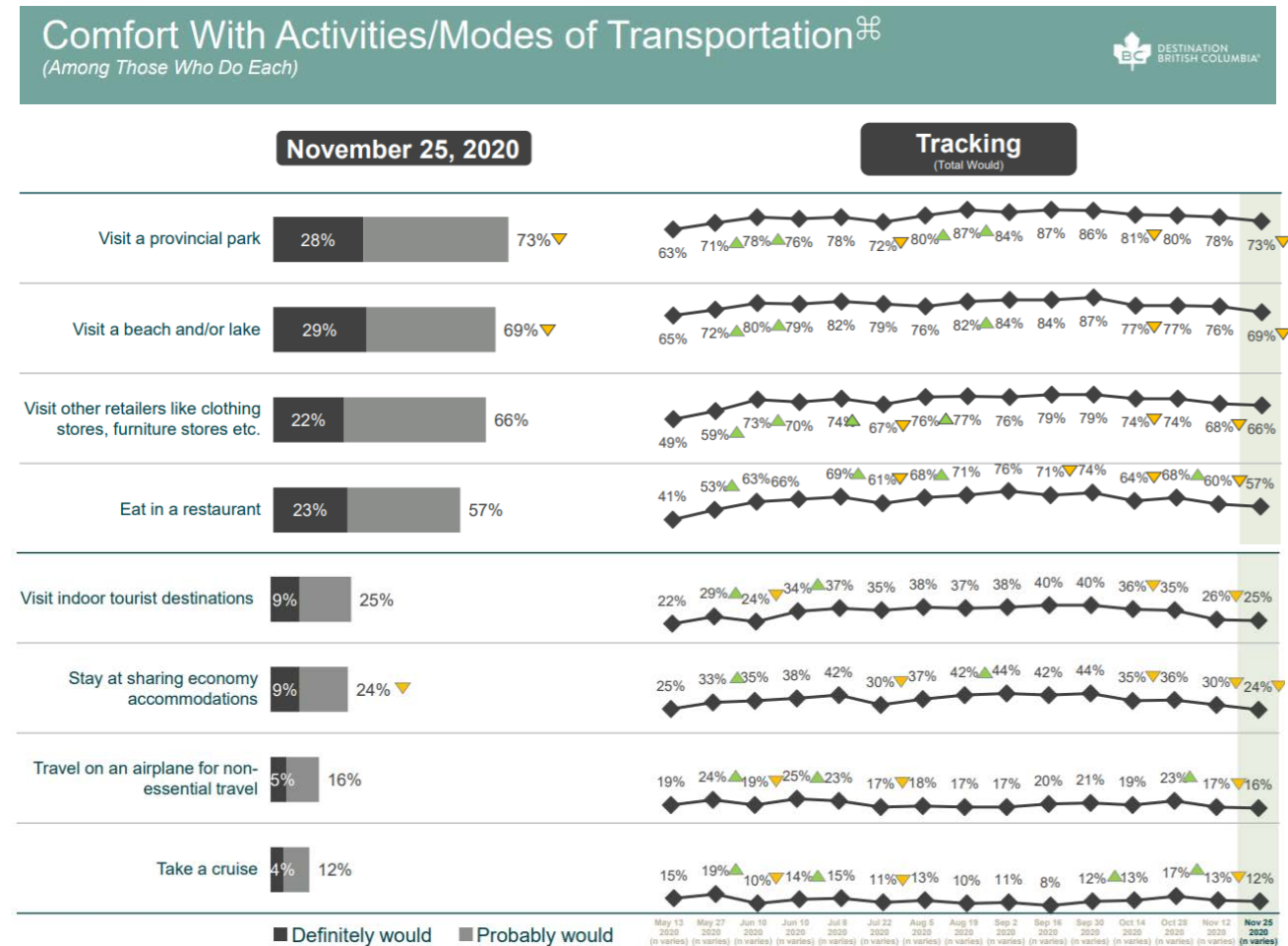
I feel safe to travel / Je me sens à l'aise de voyager



Source: [Destination Canada's Weekly Resident Sentiment, Wave 27, Leger, December 8, 2020](#)

BC residents' comfort with tourism activities is down

- Wave 15 (November 25) of Destination BC's BC Residents' Public Perceptions survey shows that BC residents' comfort with many tourism activities and modes of transport have trended downward.
- Visiting a provincial park, visiting a beach and/or lake, staying at sharing economy accommodations, travelling by car or RV for non-essential travel, staying at a hotel/motel, and taking a ferry for non-essential travel have all trended downward.

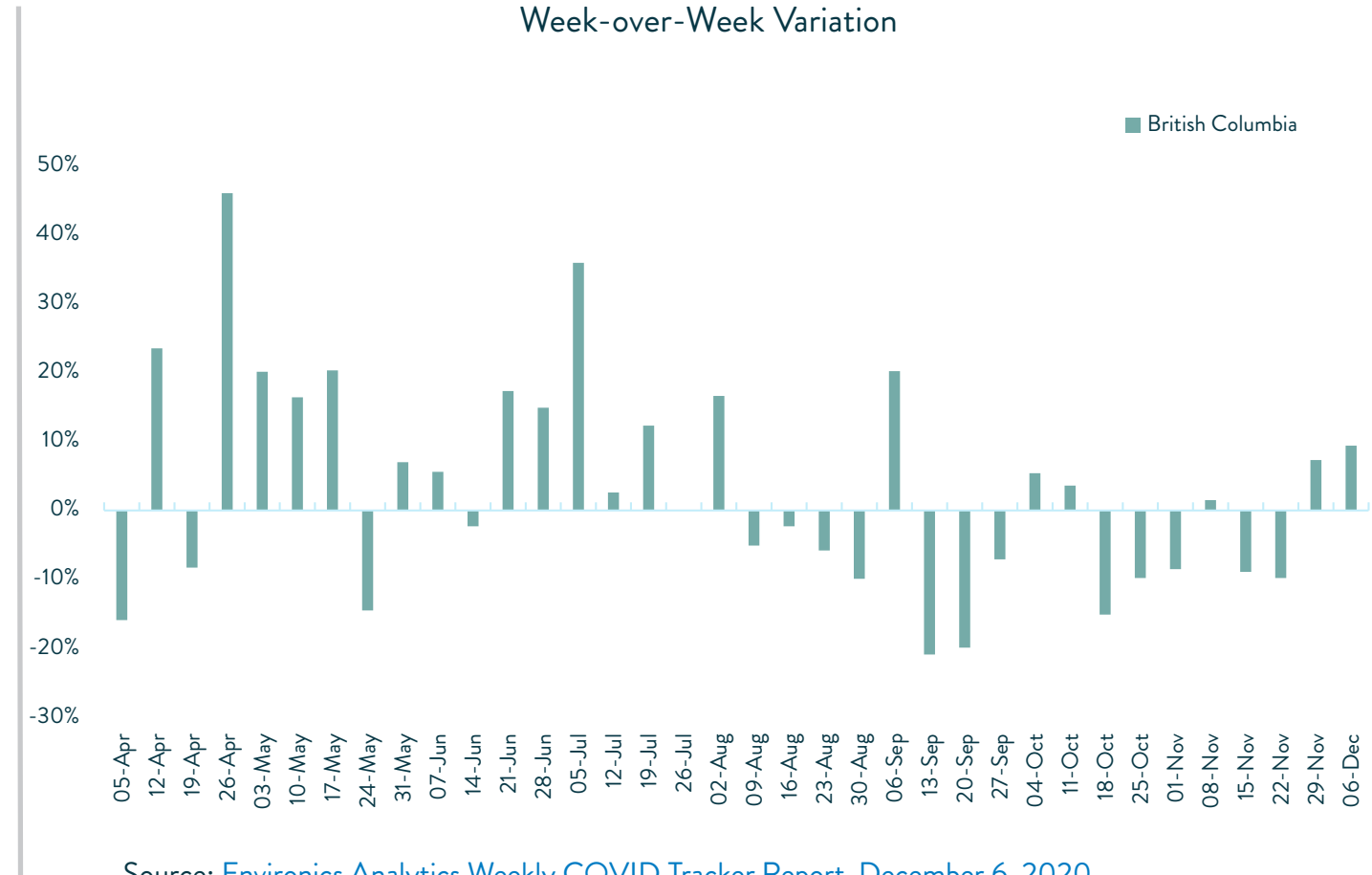


Source: [Destination BC's BC Residents' Public Perceptions: COVID-19 Travel and Tourism Wave 15, Insights West, November 25, 2020](#)

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

- According to Environics Analytics Weekly COVID Tracker Report, during the week ending December 6, BC experienced a week-over-week increase (+9.4%).
- Week-over-week increases in domestic overnight visitation were seen in the Vancouver, Coast & Mountains (+21.2%), the Kootenay Rockies (+10.5%), and the Thompson Okanagan (+3.1%).
- However, week-over-week decreases in movement in domestic overnight visitation were seen in other regions of the province:
 - Cariboo Chilcotin Coast (-37.5%)
 - Vancouver Island (-4.4%)
 - Northern BC (-0.3%)
- Note that Environics Analytics made adjustments to data pertaining to the weeks ending November 22 and 29. Week-over-week percent changes of overnight visitation have been updated in this Research Roundup (Week 26) for these two weeks. For regional percent changes see page 10 of this report.

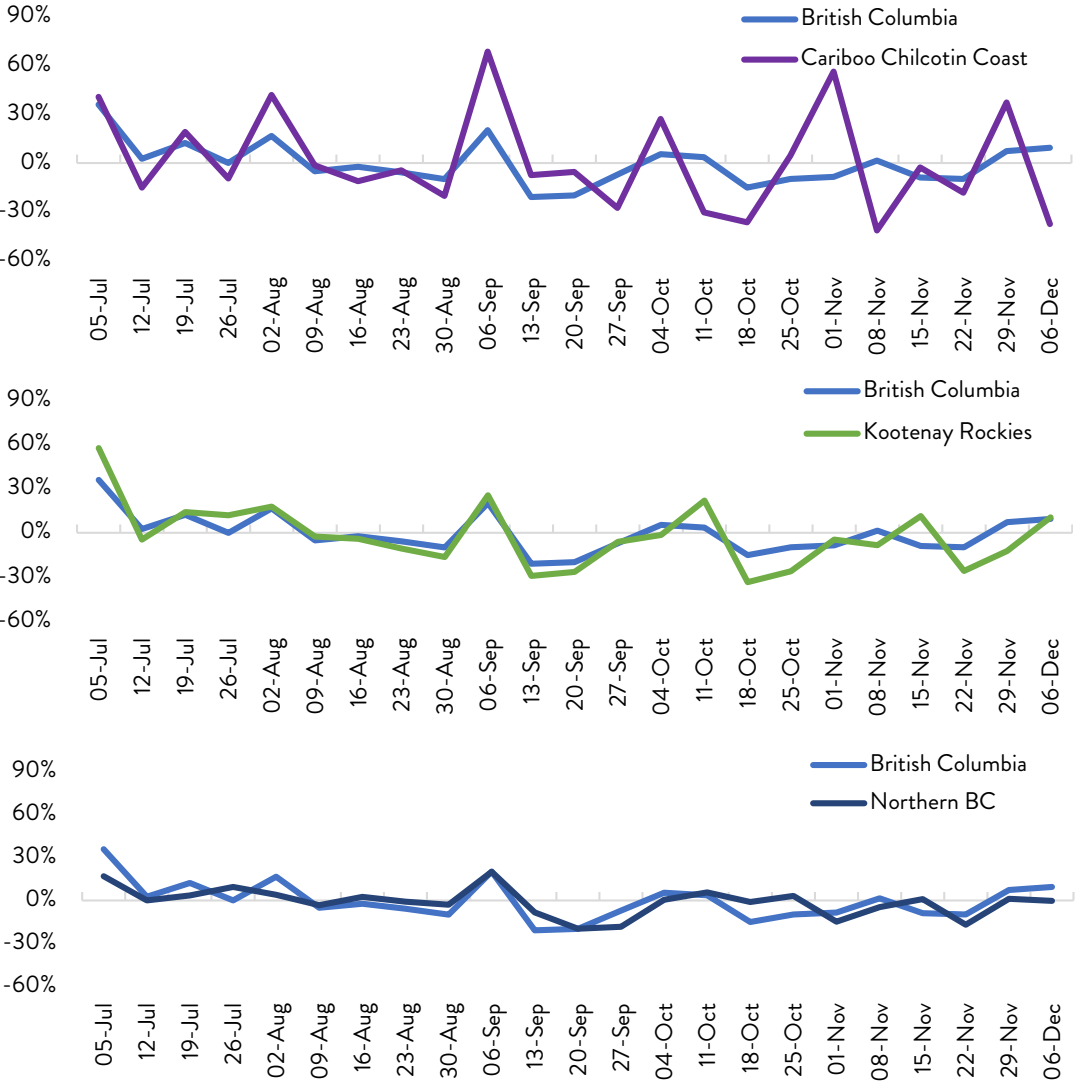
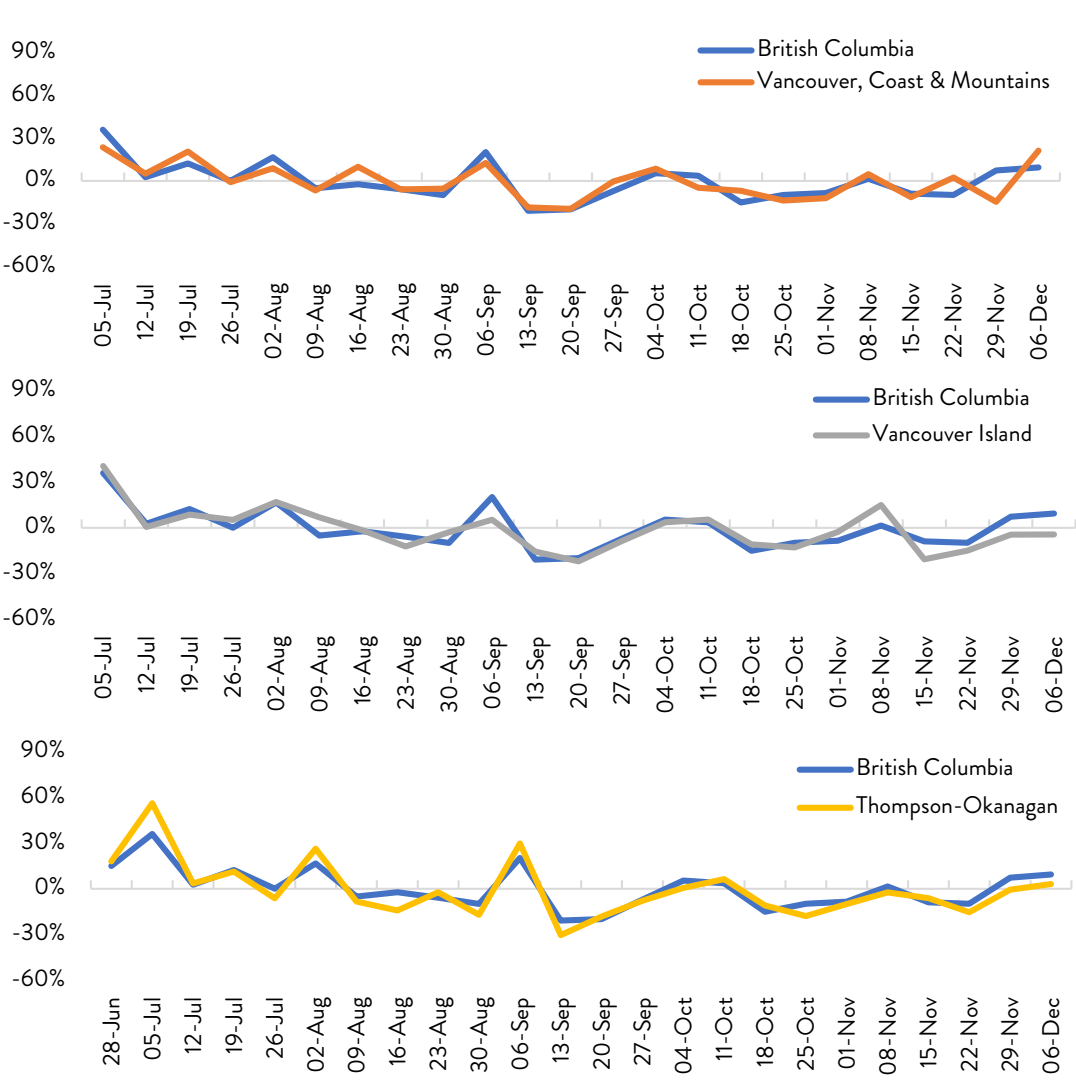
BC's Domestic Overnight Visitation
Week-over-Week Variation



Source: [Environics Analytics Weekly COVID Tracker Report, December 6, 2020](#)



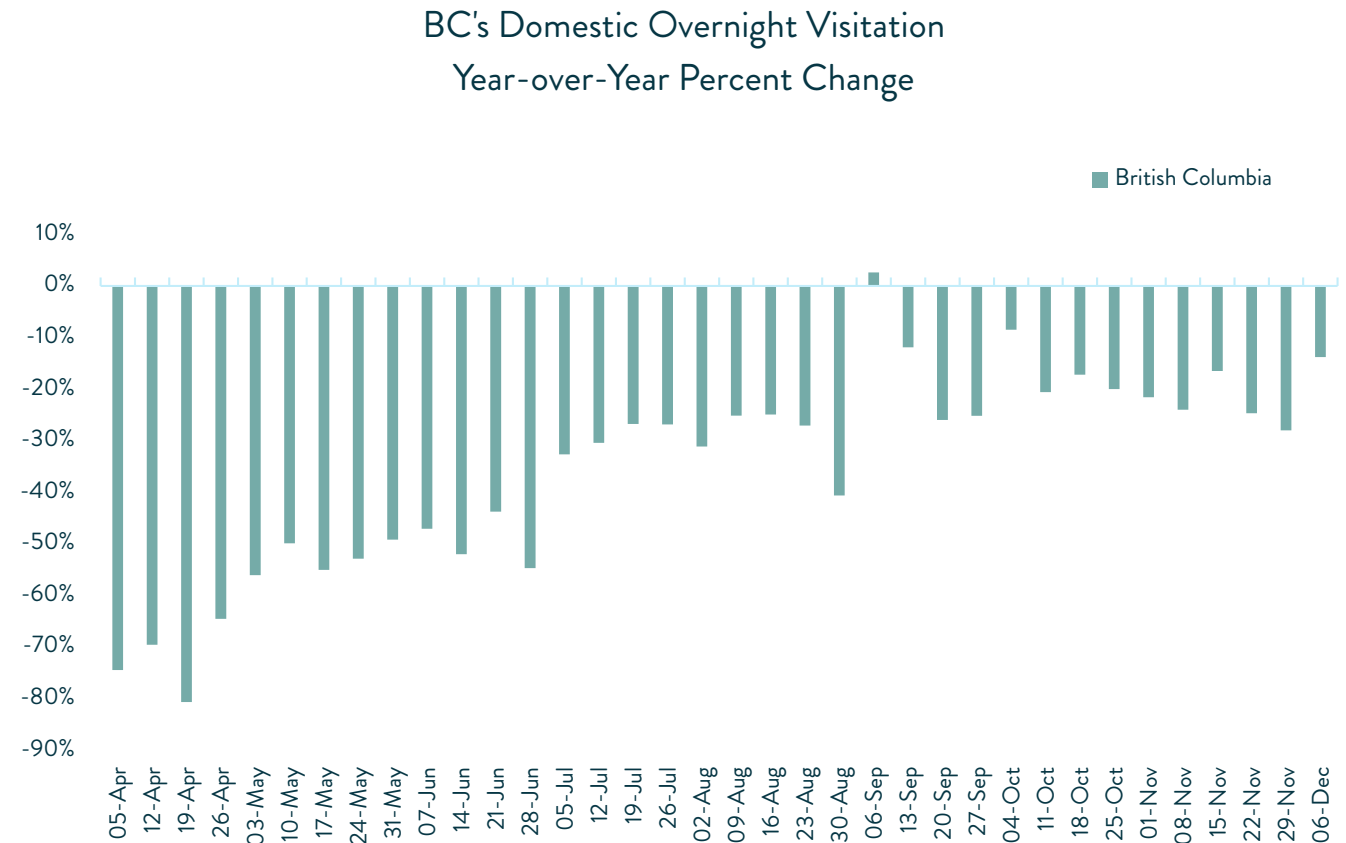
BC and Regional Domestic Overnight Visitation Week-over-Week Variation



Source: Environics Analytics Weekly COVID Tracker Report, December 6, 2020

For over 3 months, decreases in weekly movement in BC are seen compared to same periods in 2019

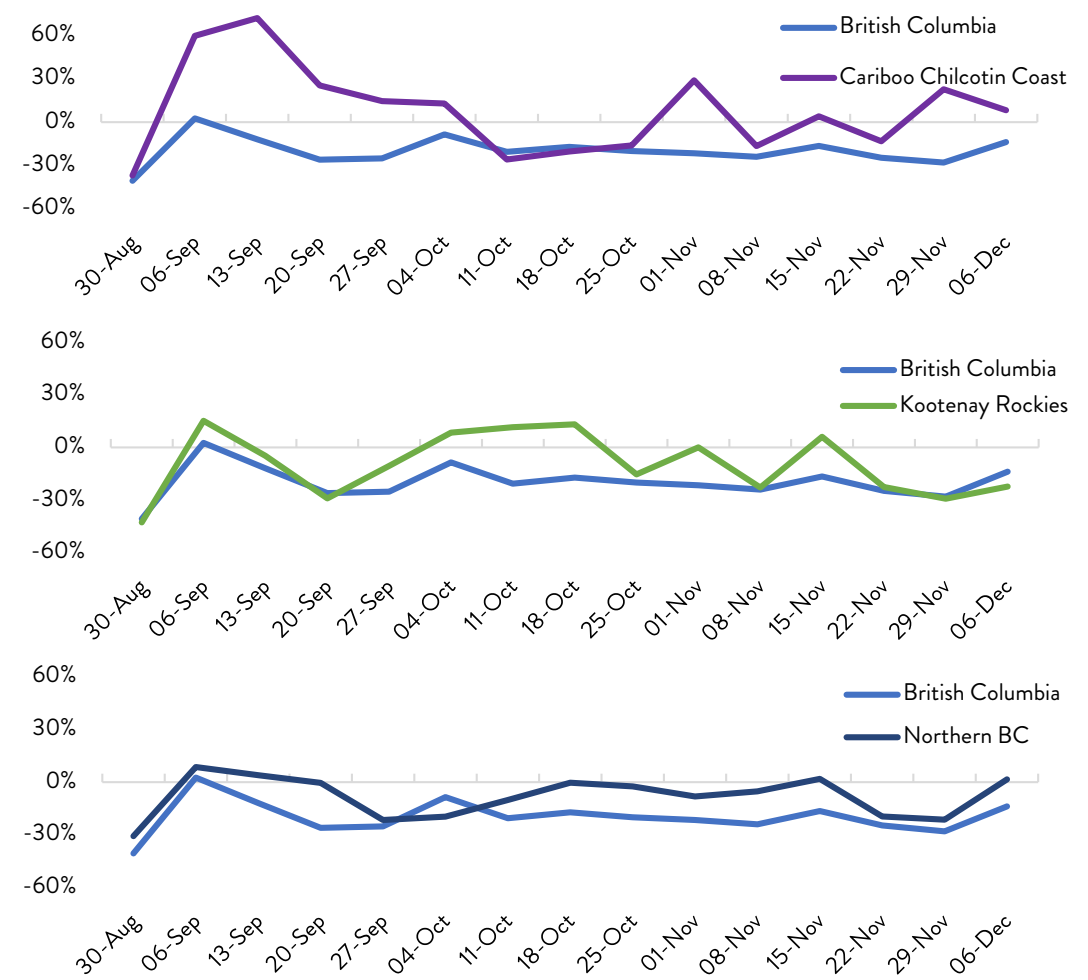
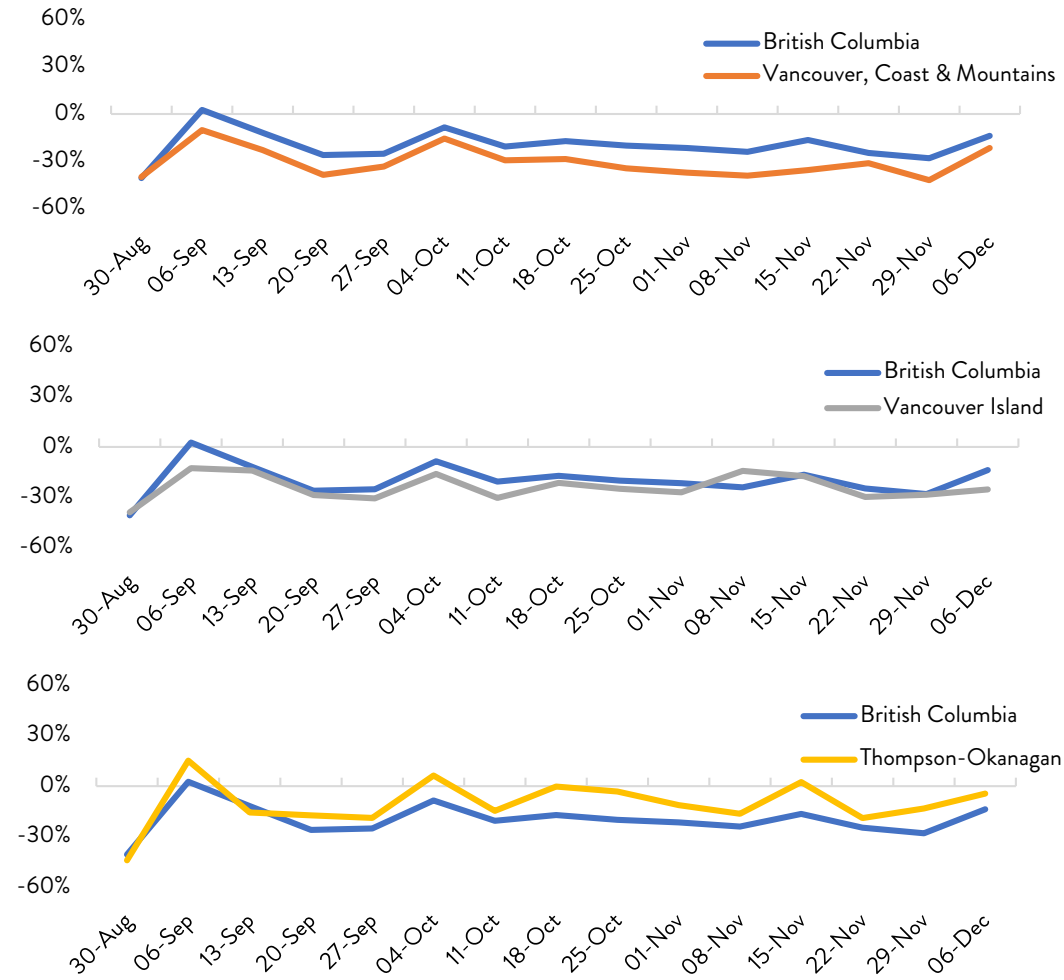
- Environics Analytics also reports year-over-year analysis in the Weekly COVID Tracker Report.
- For the thirteen consecutive week, BC's overnight domestic visitation was down (-13.8%) for the week ending December 6 compared to the same week in 2019.
 - Vancouver Island (-25.3%)
 - Kootenay Rockies (-22.3%)
 - Vancouver, Coast & Mountains (-21.6%)
 - Thompson Okanagan (-4.4%)
- However, a year-over-year increase in visitation was seen for:
 - Northern BC (+1.6%)
 - Cariboo Chilcotin Coast (+8.3%)
- Note that Environics Analytics made adjustments to data pertaining to the weeks ending November 22 and 29. Year-over-year percent changes of overnight visitation have been updated in this Research Roundup (Week 26) for these two weeks. For regional percent changes see page 10 of this report.



Source: [Environics Analytics Weekly COVID Tracker Report, December 6, 2020](#)



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



Source: Environics Analytics Weekly COVID Tracker Report, December 6, 2020

Update of Previously Reported Domestic Overnight Visitation Week-over-Week and Year-over-Year Percent Changes

Source: Environics Analytics				
Domestic Overnight Visitation Percent Change	<u>Week Ending November 22</u>	<u>Week Ending November 22</u>	<u>Week Ending November 29</u>	<u>Week Ending November 29</u>
Update made available December 11, 2020	Week-over-Week Percent Change	Year-over-Year Percent Change	Week-over-Week Percent Change	Year-over-Year Percent Change
British Columbia	-9.8%	-24.7%	+7.3%	-28.0%
Vancouver, Coast and Mountains	+2.4%	-31.2%	-14.6%	-41.9%
Vancouver Island	-15.0%	-29.7%	-4.5%	-28.4%
Thompson Okanagan	-15.4%	-19.0%	-0.6%	-13.3%
Cariboo Chilcotin Coast	-18.2%	-13.3%	+37.2%	+22.8%
Kootenay Rockies	-25.8%	-22.6%	-12.3%	-29.2%
Northern BC	-16.9%	-19.6%	+1.2%	-21.4%

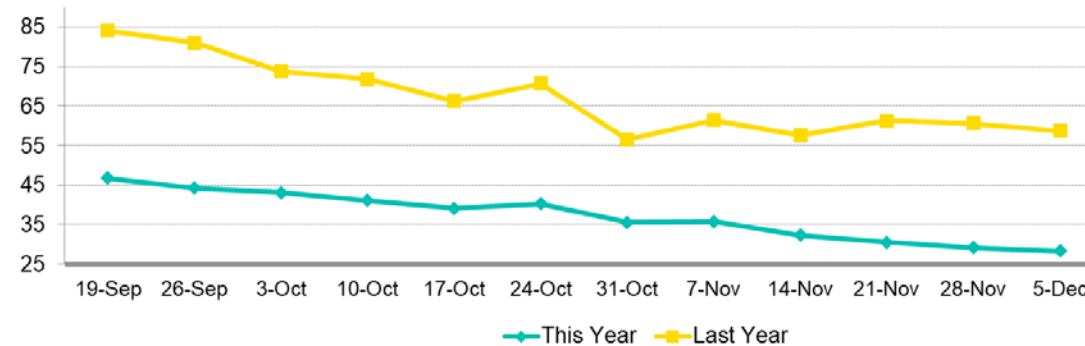


Source: [Environics Analytics Weekly COVID Tracker Report, December 6, 2020](#)

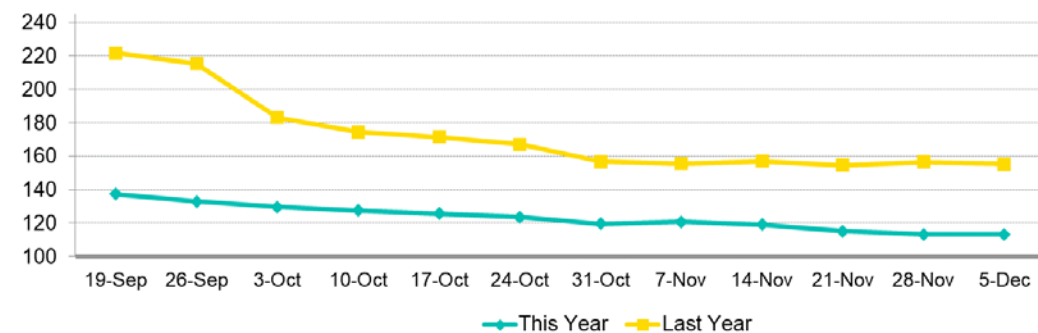
BC accommodation performance decline slows from previous weeks

- STR, an agency which captures BC hotel performance, shows the average weekly occupancy for BC was 28.3% for the week of November 29 to December 5, 2020. This represents a decrease of -0.9 points from the previous week and a decrease of -30.4 points compared to a similar period in 2019.
- BC's average daily rate (ADR) was \$113.32 for the week of November 29 to December 5, 2020. This remains the same from the previous week, and a decrease of -27.0% compared to a similar period in 2019.

Weekly Occ (%) - Sep 19, 2020 to Dec 05, 2020



Weekly ADR - Sep 19, 2020 to Dec 05, 2020



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



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

Source: STR Nov 29 – Dec. 5, 2020	Nov 29 – Dec. 5, 2020	Week-over-Week Nov 29 – Dec. 5, 2020 vs. Nov 22 – 28, 2020, 2020	Year-over-Year Nov 29 – Dec. 5, 2020 vs. Dec 1 – 7, 2019	Nov 29 – Dec. 5, 2020	Week-over-Week Nov 29 – Dec. 5, 2020 vs. Nov 22 – 28, 2020	Year-over Year Nov 29 – Dec. 5, 2020 vs. Dec 1 – 7, 2019
	Occupancy Rate	Occupancy Point Change	Occupancy Point Change	ADR	ADR Percent Change	ADR Percent Change
British Columbia	28.3%	-0.9	-30.4	\$113.32	0.0%	-27.0%
Vancouver (City of)	15.3%	-0.7	-54.8	\$134.75	-1.4%	-29.2%
Whistler	15.0%	2.0	-44.8	\$202.49	5.5%	-22.8%
Victoria	20.4%	0.2	-43.2	\$120.95	-3.7%	-17.9%
Kelowna	22.0%	-0.4	-23.7	\$98.38	-3.7%	-17.3%
Kamloops	41.2%	-2.4	-1.8	\$91.72	1.8%	-11.6%
Richmond	38.9%	0.7	-35.4	\$122.21	0.7%	-21.2%



Over a third of British Columbians do not intend to travel abroad without a vaccine

- Over a third of British Columbians surveyed in the BC Residents' Public Perceptions Survey do not intend to travel to the US or to other countries without a vaccine/treatment. However, the majority of British Columbians will travel within the province without a vaccine. (Source: [DBC's BC Residents' Public Perceptions Survey November 25](#))
- BC residents who indicated (at the time of the BC Residents' Public Perception Survey Wave 14 (November 12) they did not intend to travel in the next 3 months or until a vaccine/treatment were asked why they did not intend to travel. 65% of BC residents indicated that they do not intend to travel because of the 'risk of being exposed/contracting COVID-19' and 54% of BC residents indicated they do not intend to travel because of 'concerns that COVID-19 protocols are not being properly followed'. (Source: [DBC's BC Residents' Public Perceptions Survey November 12](#))
- 48% of Canadians are not overly concerned about Canada potentially receiving doses of a new COVID-19 vaccine after certain other countries, and feel that a few months won't make much of a difference. (Source: [Leger North American Tracking Survey December 1](#))
- 28% of Canadians indicate they would take the first COVID-19 vaccine available to the public (a decrease of -9% since mid-November). 45% indicate they would wait for other vaccines to be available (an increase of +12% since mid-November). While there is a decline from last month to take the first vaccine, nearly 50% are open to taking 'a vaccine'. (Source: [Leger North American Tracking Survey December 1](#))



CLIA estimates that, for each day that cruises are suspended, 100 Canadian jobs are lost

- According to Cruise Lines International Association, in a typical year, the cruise industry generates \$4.1 billion CAD in economic activity in Canada and supports more than 29,000 Canadian jobs. Every 1% drop in cruising in Canada results in up to 300 jobs lost, and CLIA estimates that, for each day that cruises are suspended, 100 Canadian jobs are lost.
- From mid-March, when the suspension of cruises began, through the end of September, the Cruise Line International Association estimates that the suspension of cruise operations will result in a total loss of 20,500 direct and indirect Canadian jobs and \$1.09 billion CAD in total wages.
- Since the beginning of tracking in May of BC residents' comfort in various types of activities and transportation, the level of comfort to take a cruise varied between a high of 19% of BC residents comfortable to take a cruise seen in late May and a low of 8% seen in mid-September. (Source: [DBC's BC Residents' Public Perceptions Survey November 25](#))



Source: [Cruise Lines International Association, 2020](#)

50% of US travellers are optimistic/very optimistic that they will be able to take a cruise in 2021

- While 75% of US travellers currently indicated that they feel somewhat unsafe/very unsafe to take a cruise at this moment, 50% of US travellers are optimistic/very optimistic that they will be able to take a cruise in 2021.
(Source: [Destination Analysts, December 8, 2020](#))
- According to a Cruise Lines International Association report, cruising contributed US\$55 billion to the American economy last year, up 5.3% from 2018. From mid-March through the end of 2020, it is estimated that the suspension of cruising in the United States will result in a loss of over US\$32 billion in economic activity and 254,000+ American jobs.

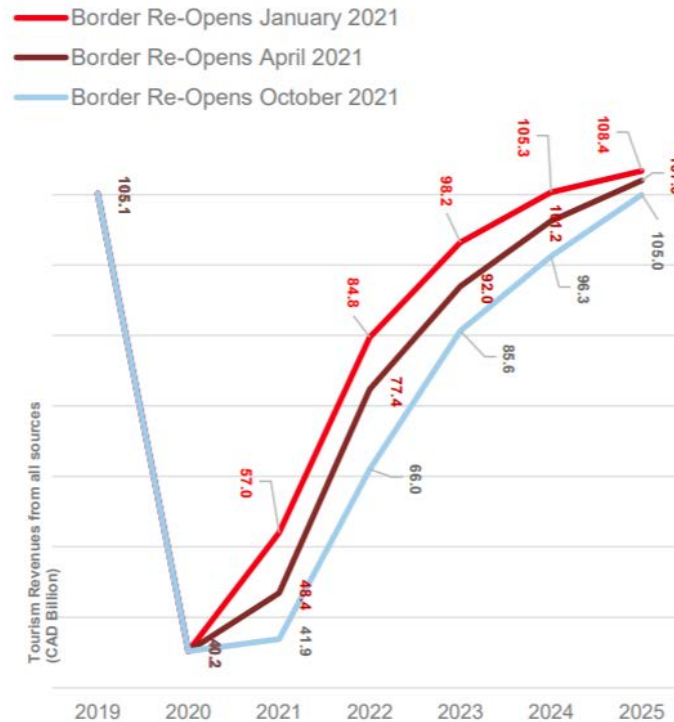


Source: [Cruise Lines International Association, November 23](#)

Destination Canada forecasts that full recovery could occur anywhere between 2024 and 2026

- The November visitor demand forecast from Destination Canada shows three Canada/US border re-opening scenarios: re-opening in January, April, or October 2021.
- Destination Canada estimates that if the Canada/US border re-opens January 2021, tourism revenues will increase from ~\$40B in 2020 to \$57B in 2021 and fully recovering to 2019 levels by 2024.
- With a Canada/US border re-opening in April 2021, tourism revenue is forecasted to reach \$48.4B in 2021 and to recover to 2019 levels by 2025.
- With a Canada/US border re-opening in October 2021, recovery to 2019 levels are not expected until 2026.
- Note this report was released prior to the latest Canada/US border closure extension of January 21, 2021.

Forecasted total tourism revenues under three border re-opening scenarios



Source: [Visitor Demand Forecast Update, Destination Canada, November 2020](#)



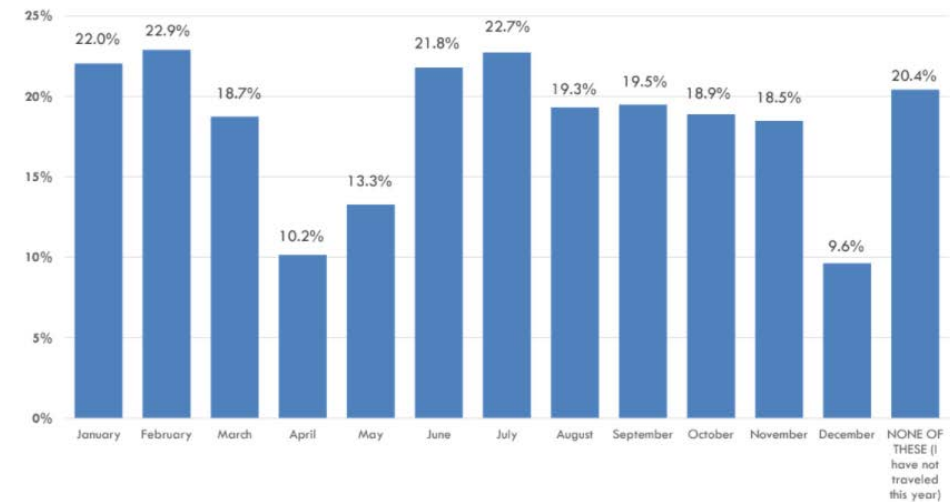
Most American travellers travelled in 2020 and expect to take 3 trips in 2021

- Destination Analysts, a US-based tourism research company, found in a recent survey that most American travellers took at least one trip in 2020, and expect to take 3 trips in 2021 on average.
- They will prioritize leisure travel in their personal budget compared to pre-pandemic times.
- Travellers will prioritize experiences that are fun and relaxing.
- American travellers are optimistic about certain types of travel, including special events, sporting events, conferences, and cruise travel.

MONTHS OF TRAVEL IN 2020

Question: In which month(s) of 2020 did you travel for any reason? (Select all the months you traveled)

(Base: Wave 39 data. All respondents, 1,204 completed surveys. Data collected December 4-6, 2020)

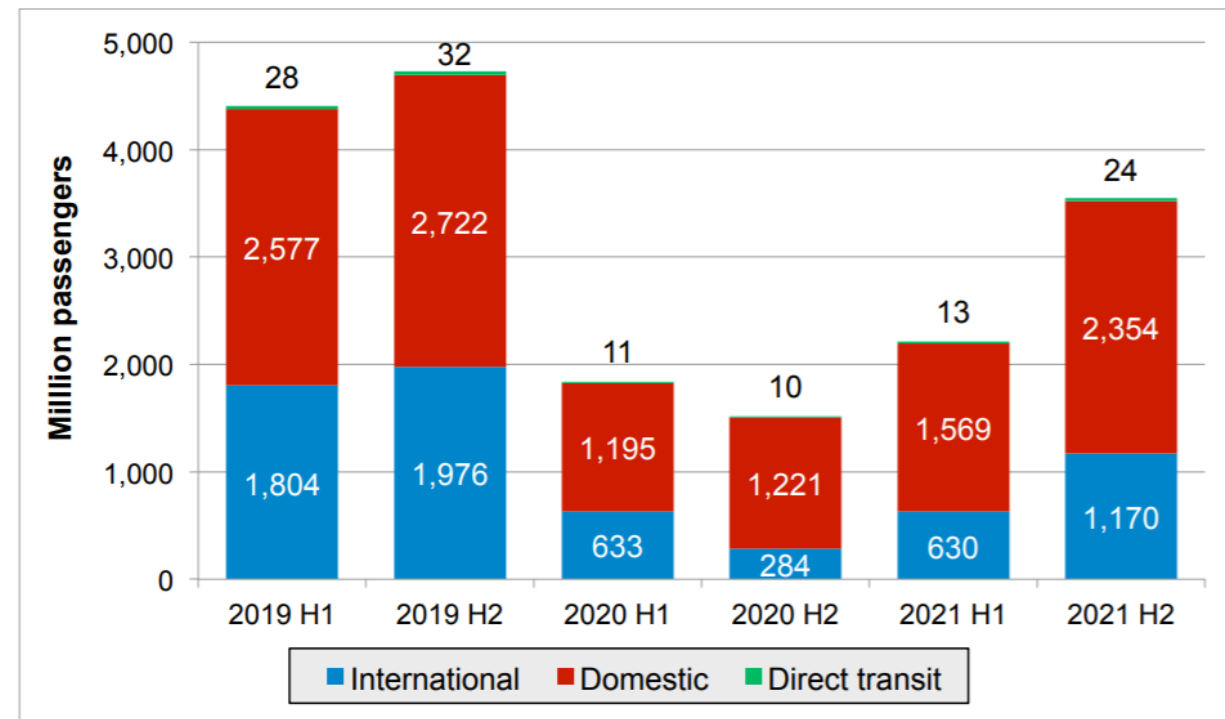


Source: [Destination Analysts, December 8, 2020](#)

Domestic air traffic already in recovery, while international to increase in 2021

- The Airports Council International fifth assessment analyzing the economic impact of the COVID-19 pandemic, and its effects on the global airport business, forecasts domestic passenger traffic to recover faster than international traffic, with countries like China and Russia already returning to 2019 levels.
- Globally, domestic traffic will continue to increase in 2021 to reach 2.35 billion passengers in the second half of 2021 corresponding to 86.5% of the 2019 level for the same period.
- They also forecasted global passenger traffic volume for the first half of 2021 to reach 2.2 billion, a 20% increase compared to the same period in 2020. The second half of 2021 will see more than 3.5 billion passengers, double the passenger volume for the same period in 2020.

Chart 2: Projected global semi-annual passenger traffic recovery by type of traffic (2020, in million passengers)



Source: ACI World

Source: [ACI Advisory Bulletin, Airports Council International, 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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