



DESTINATION
BRITISH COLUMBIA®

COVID-19 Research Roundup

January 11, 2021

Kiskatinaw Bridge, Northern BC

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 January 12, 2021, Canadian and US officials agreed to extend the closure of the border between the two countries to non-essential travel until at least February 21, 2021.

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, and further on January 7, 2021.





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:

- British Columbians remain hesitant toward welcoming most visitors
- Intentions to travel domestically are increasing for BC residents
- BC sees a decrease of -5.7% in weekly domestic overnight visitation compared to previous week
- Weekly movement in BC is down -58.7% compared to same period in 2019/20
- BC's weekly occupancy rate (27.6%) the highest rate seen across Canada
- BC's average daily rate (\$158.81) up from the previous week
- BC residents miss visiting family and friends, restaurants, and travel
- 71% of Canadians intend to get a COVID-19 vaccine in 2021
- Almost half of Americans do not feel safe to travel, but inspiration is high
- Skift reports that nimble operators and leisure travel will outperform institutions and business
- Cirium's Airline Insights Review 2020 says 7 key trends may emerge as a result of airline industry's shift
- Tourism and COVID-19 dashboard and reporting resources

British Columbians remain hesitant toward welcoming most visitors

- In Destination Canada's Wave 28 (January 5, 2021) report, 50% of British Columbians said they would welcome visitors travelling to their community from nearby communities, with 31% being welcoming of visitors from other parts of the province.
- Only 17% of BC residents would welcome visitors from other parts of Canada, 5% from the United States, and 7% from international countries.

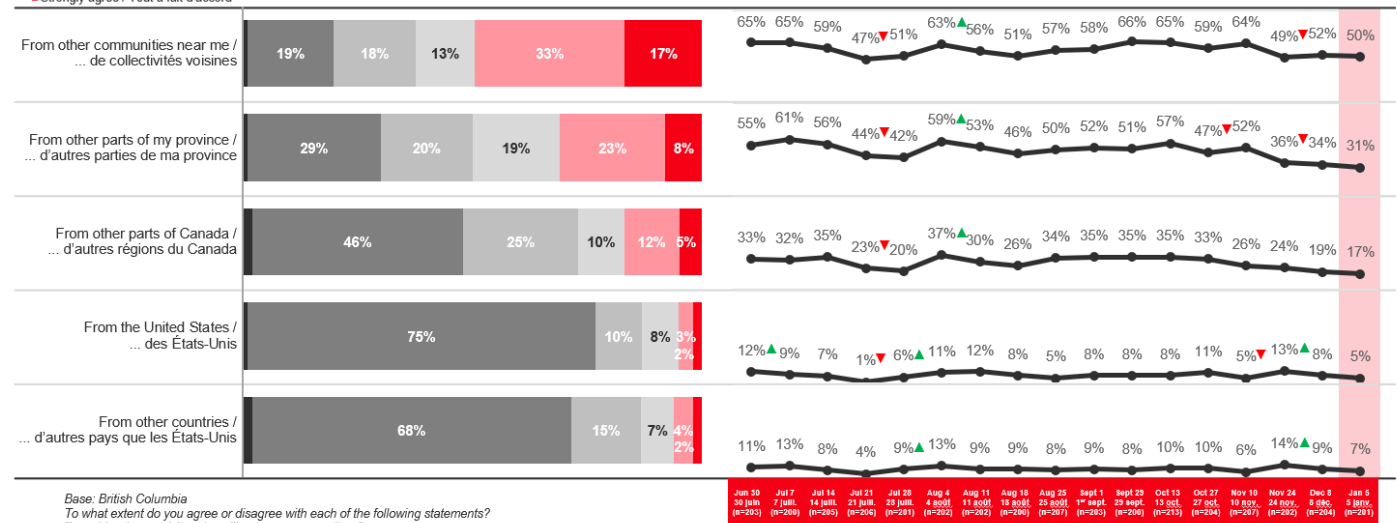
British Columbia / Colombie-Britannique Level of Welcome Towards Visitors / Opinion envers l'accueil de visiteurs

■ 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

Jan 5 / 5 janv.

Trending / Tendance

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



Base: British Columbia
To what extent do you agree or disagree with each of the following statements?
"I would welcome visitors travelling to my community..."

Niveau de référence : Colombie-Britannique
Dans quelle mesure êtes-vous d'accord avec chacun des énoncés suivants?
« J'accueillerais volontiers dans ma collectivité des visiteurs... »

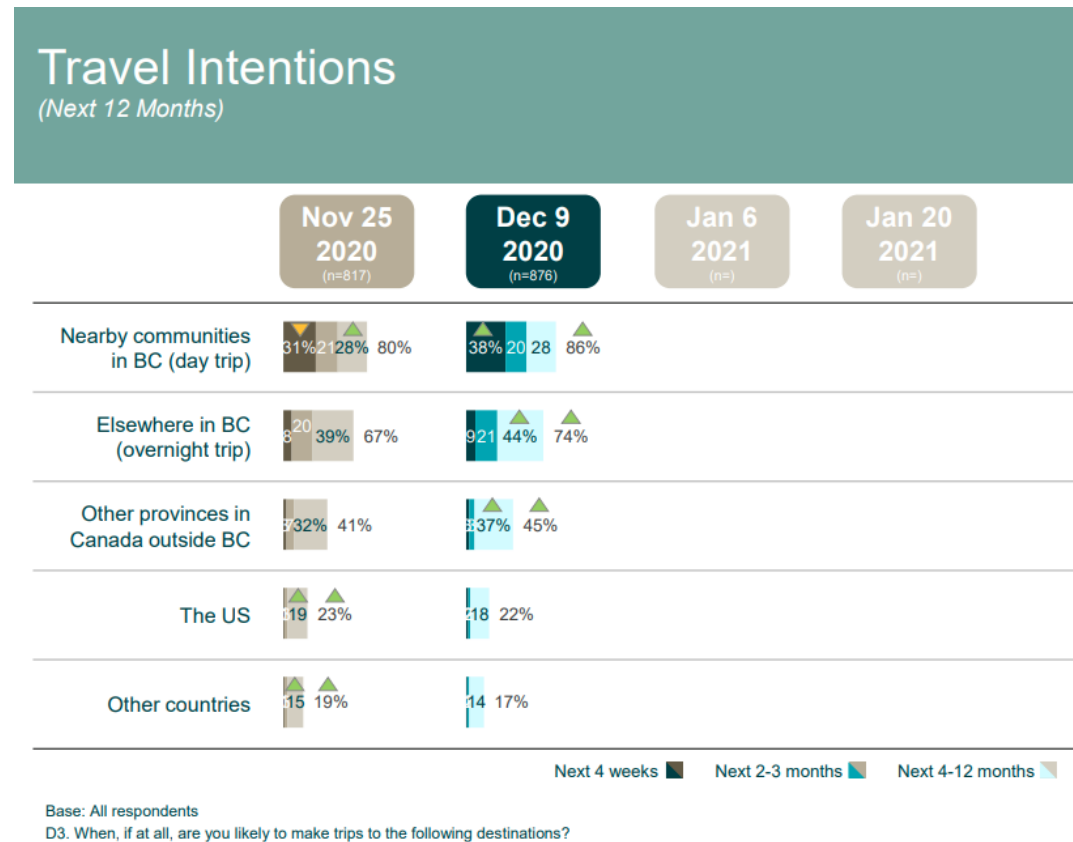
▲ indicates significantly higher than previous week @ 95% confidence / indique un résultat considérablement plus élevé que la semaine précédente (confiance à 95 %)
▼ indicates significantly lower than previous week @ 95% confidence / indique un résultat considérablement moins élevé que la semaine précédente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



Source: [Destination Canada's Weekly Resident Sentiment, Wave 28, Leger, January 5, 2021](#)

Intentions to travel domestically are increasing for BC residents

- Wave 16 (December 9) of Destination BC's BC Residents' Public Perceptions survey shows that BC residents' travel intentions are up from the previous wave.
- 86% of BC residents intend to travel to nearby communities in BC in the next 12 months, up from 80%, including 38% intending to travel in the next 4 weeks. 74% intend to travel elsewhere in BC in the next 12 months, up from 67%, including 44% intending to travel in the next 4-12 months.
- 45% of BC residents intend to travel to other provinces in Canada in the next 12 months, up from 41%, while 22% intend to travel to the US and 17% to other international countries.
- Destination BC's BC Residents' Public Perceptions: COVID-19 Travel and Tourism Tracking Survey resumed January 6, 2021. Results will be available in the next Research Roundup.



Source: [Destination BC's BC Residents' Public Perceptions: COVID-19 Travel and Tourism Wave 16, Insights West, December 9, 2020](#)

BC sees a decrease of -5.7% in weekly domestic overnight visitation compared to previous week

- According to Environics Analytics Weekly COVID Tracker Report, during the week ending January 3, 2021, BC experienced a week-over-week decrease (-5.7%) in weekly domestic overnight visitation.
- Week-over-week decreases in movement in domestic overnight visitation were seen mostly throughout the province:
 - Vancouver Island (-25.9%)
 - Cariboo Chilcotin Coast (-25.6%)
 - Northern BC (-24.1%)
 - Thompson Okanagan (-17.9%)
- However, week-over-week increases in domestic overnight visitation were seen in the Kootenay Rockies (+29.8%) and in Vancouver, Coast & Mountains (+1.4%).

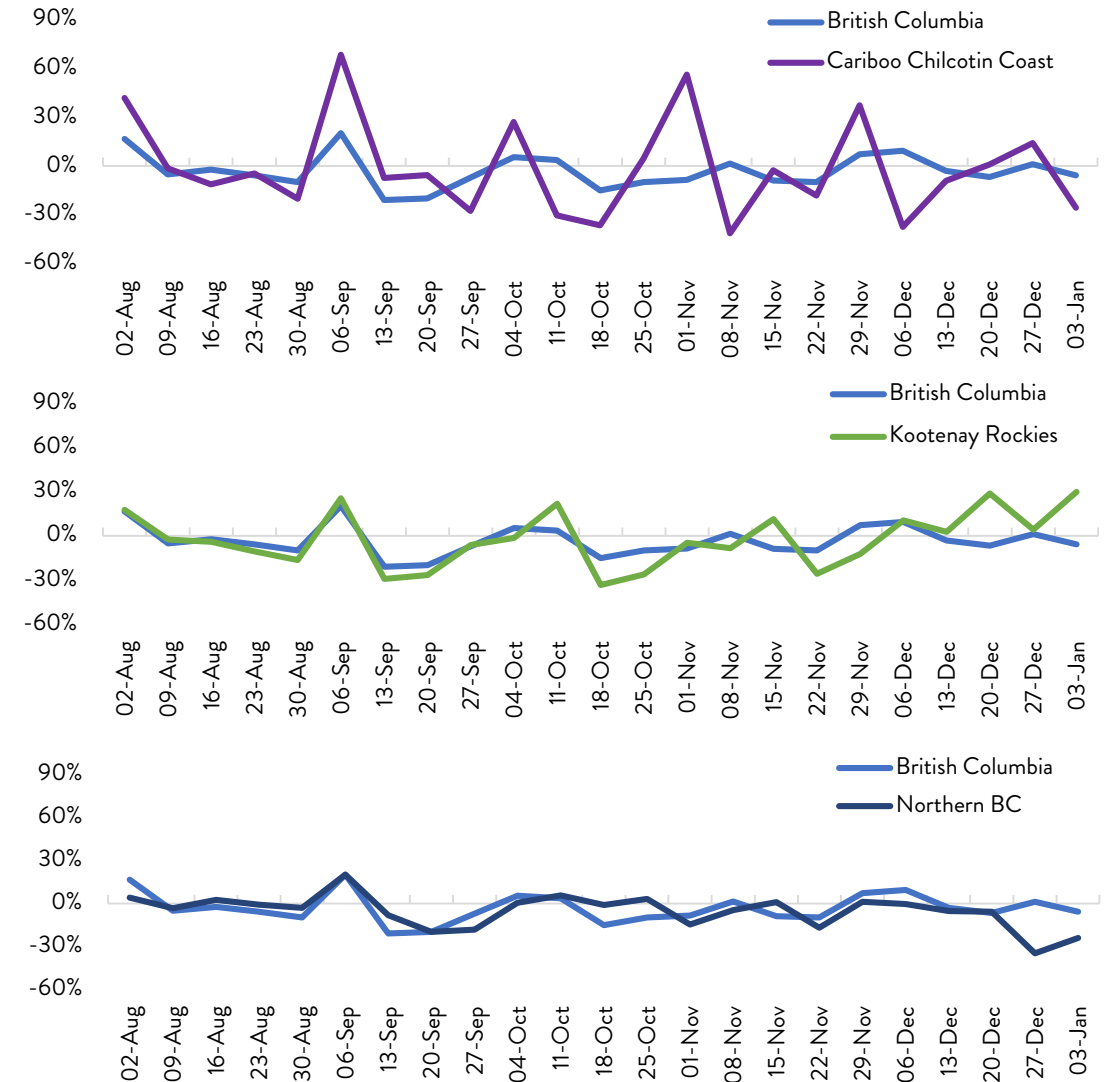
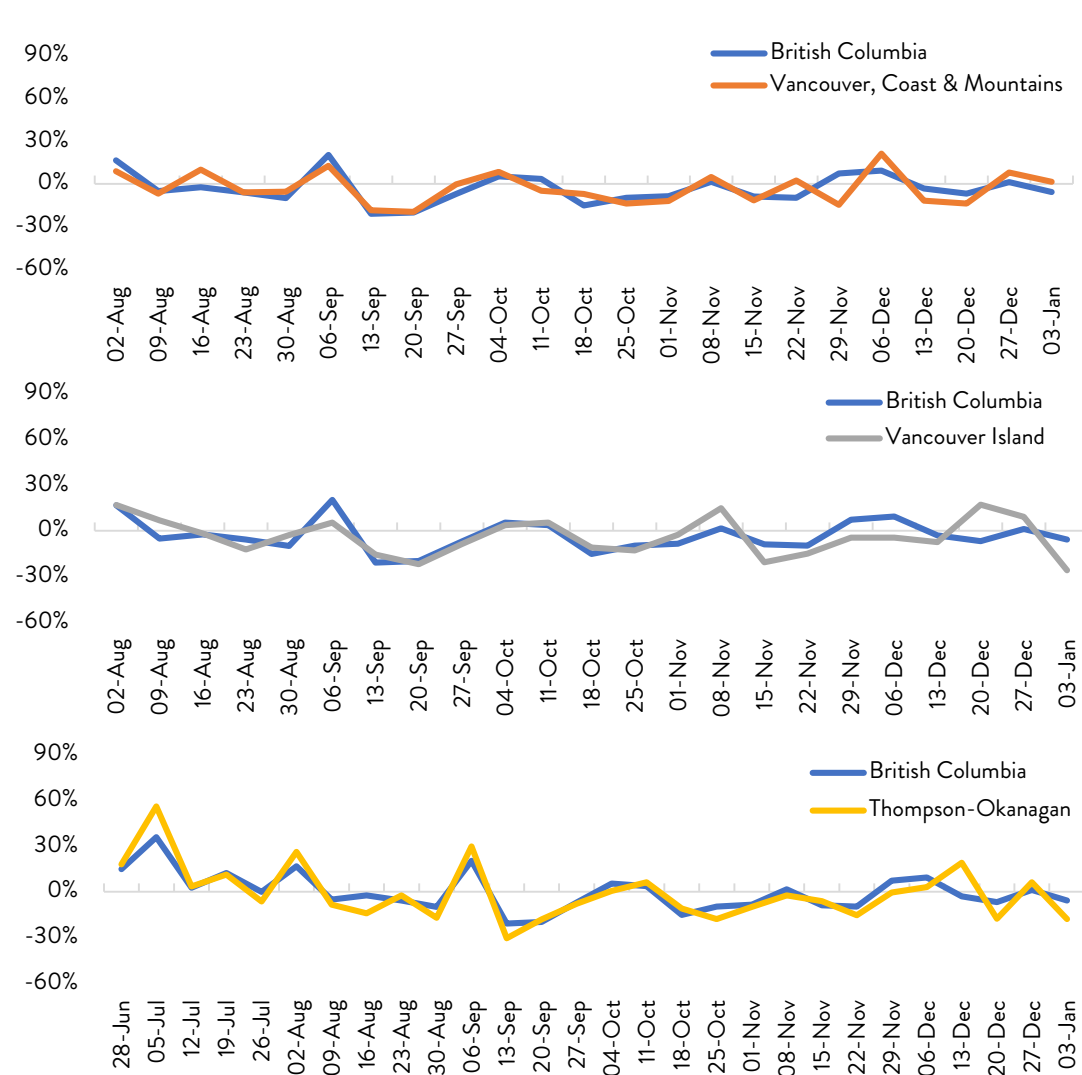
BC's Domestic Overnight Visitation
Week-over-Week Variation



Source: [Environics Analytics Weekly COVID Tracker Report, January 3, 2021](#)



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

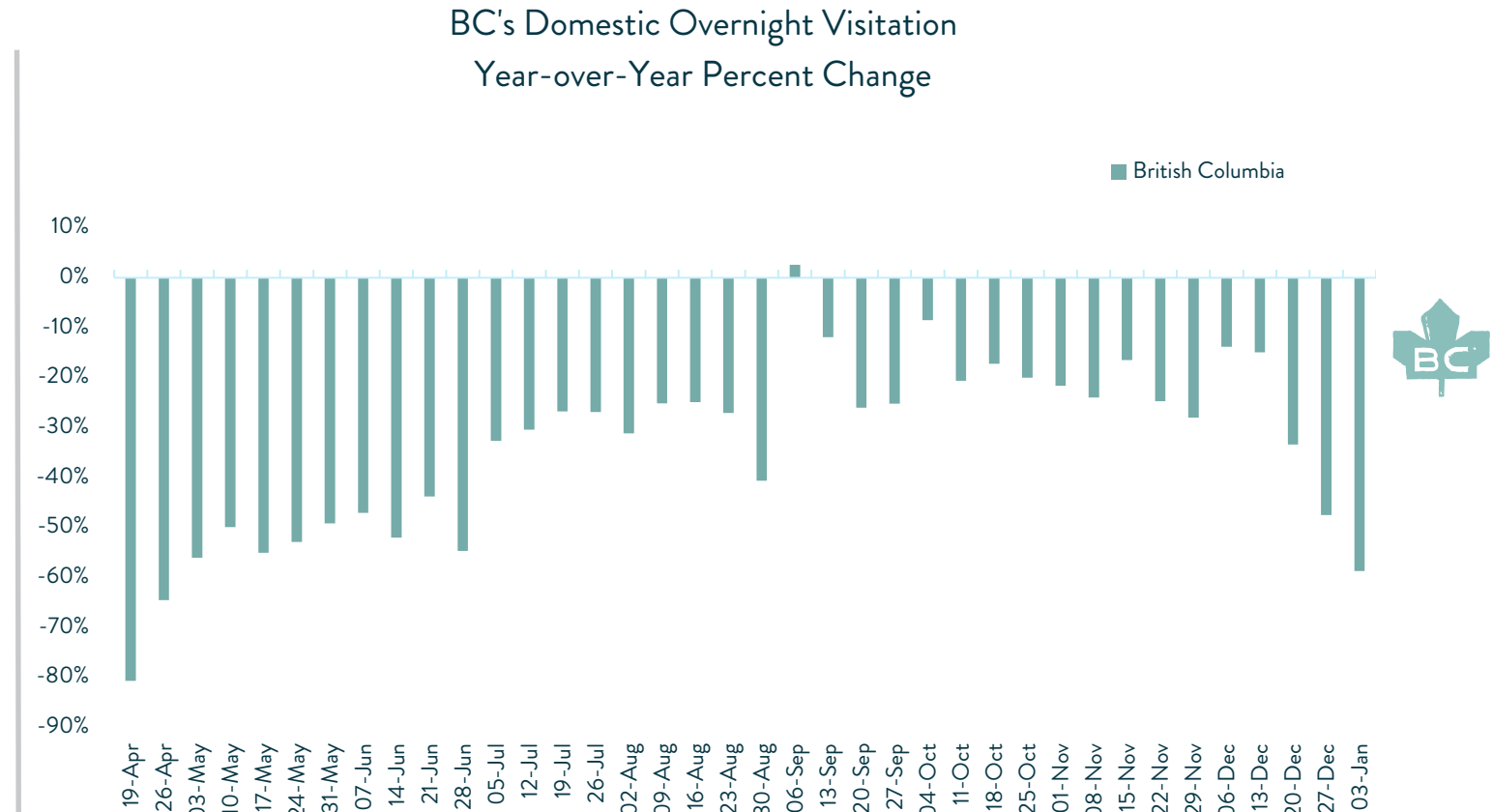


Source: Environics Analytics Weekly COVID Tracker Report, January 3, 2021

Source: [Environics Analytics Weekly COVID Tracker Report, January 3, 2021](#)

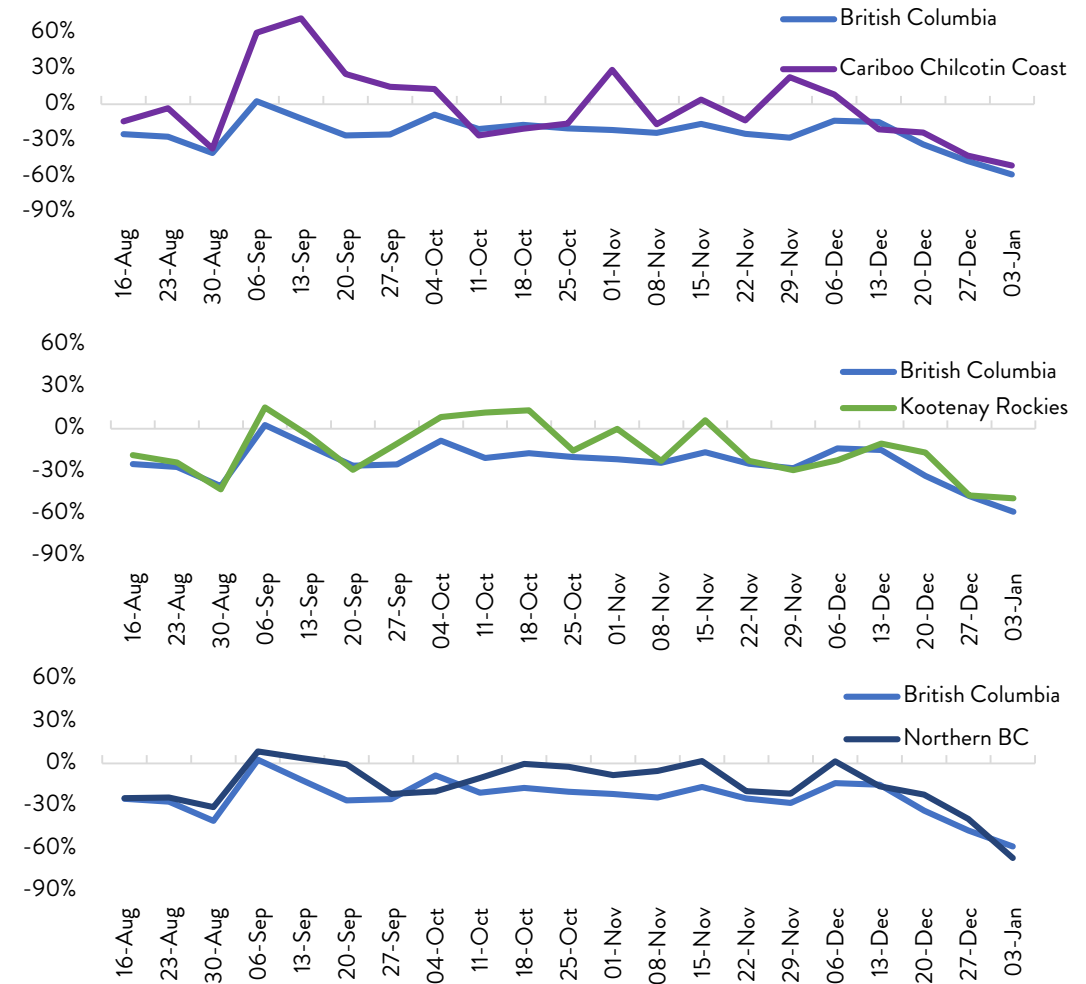
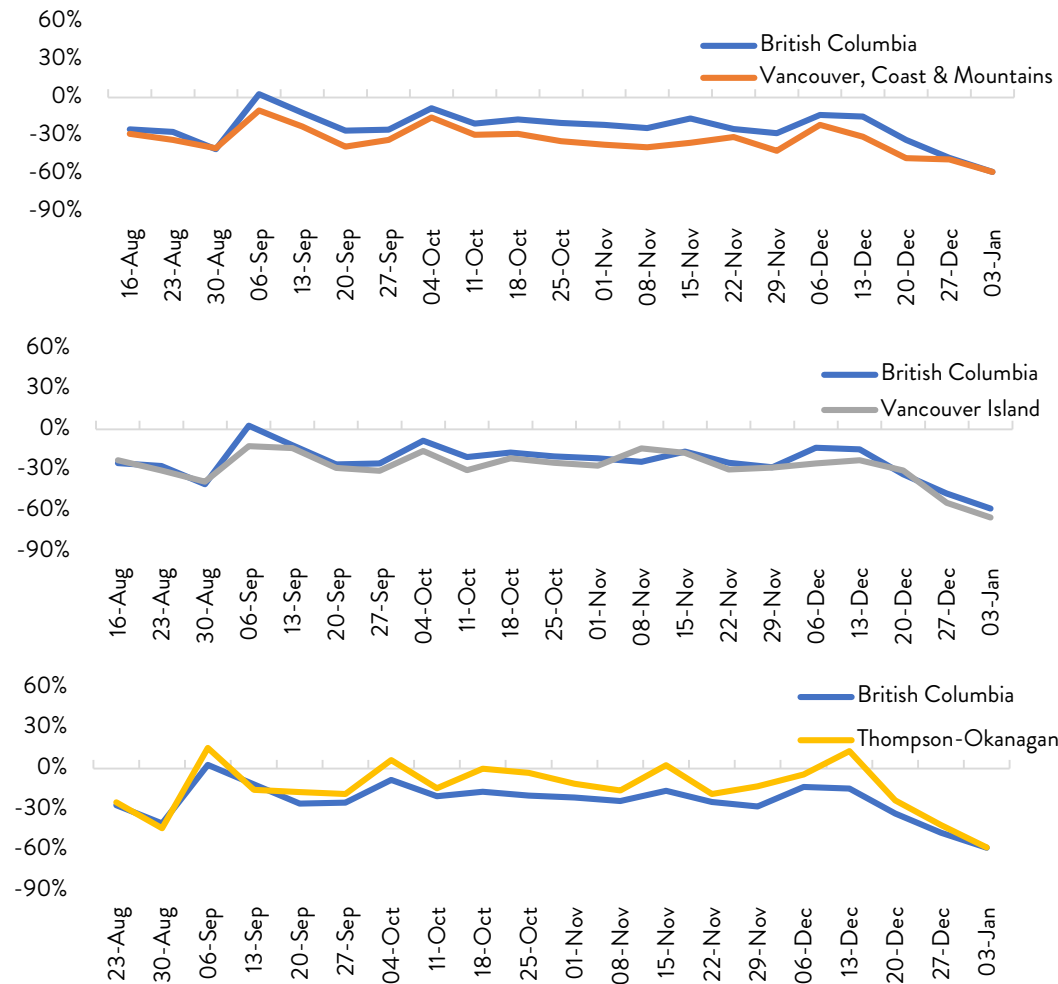
Weekly movement in BC is down -58.7% compared to same period in 2019/20

- Environics Analytics also reports year-over-year analysis in the Weekly COVID Tracker Report.
- For the week ending January 3, 2021, weekly domestic overnight visitation is down (-58.7%) compared to the same week in 2019/20. This is the greatest decrease in movement seen since late April 2020.
- A year-over-year decrease in weekly visitation was seen for all tourism regions:
 - Northern BC (-66.8%)
 - Vancouver Island (-65.3%)
 - Vancouver, Coast & Mountains (-58.5%)
 - Thompson Okanagan (-58.4%)
 - Cariboo Chilcotin Coast (-51.1%)
 - Kootenay Rockies (-49.1%)



Source: [Environics Analytics Weekly COVID Tracker Report, January 3, 2021](#)

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

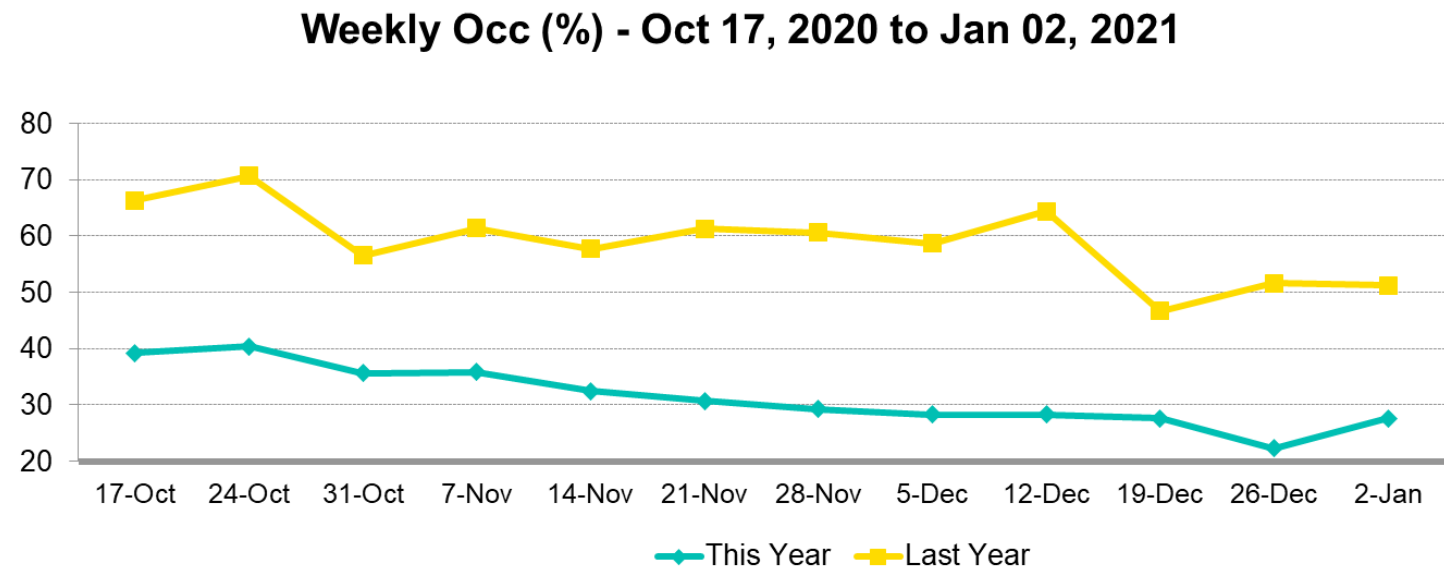


Source: Environics Analytics Weekly COVID Tracker Report, January 3, 2021

Source: [Environics Analytics Weekly COVID Tracker Report, January 3, 2021](#)

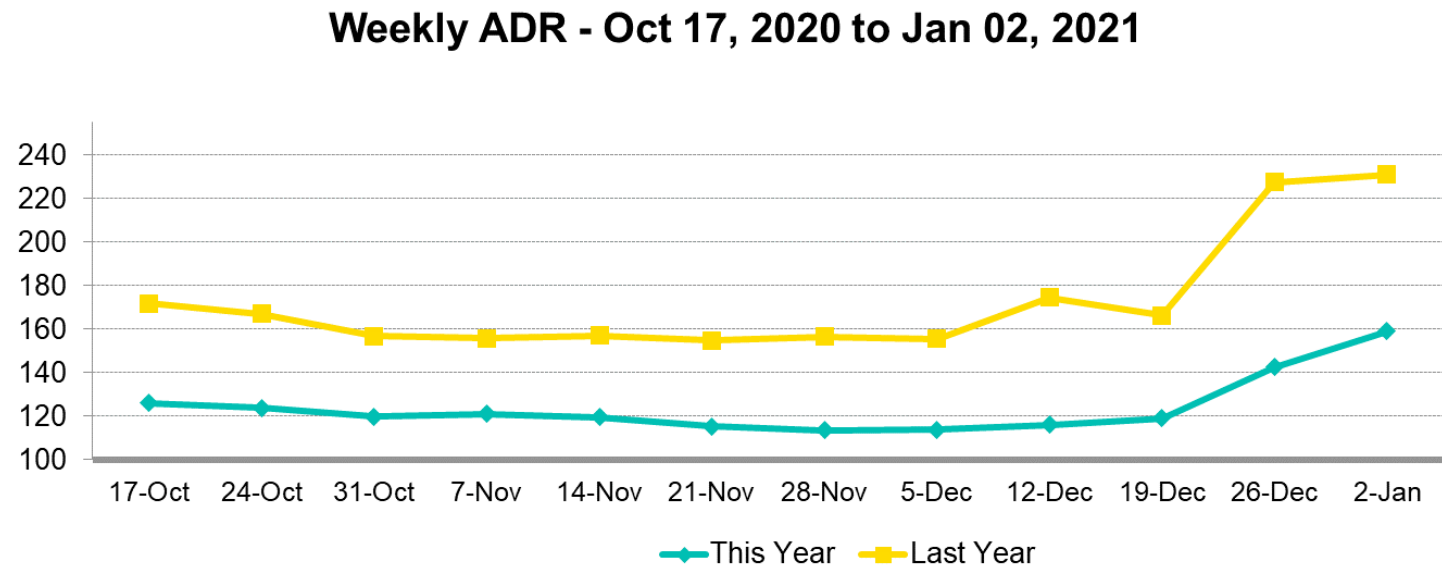
BC's weekly occupancy rate (27.6%) the highest rate seen across Canada

- STR, an agency which captures BC hotel performance, shows the average weekly occupancy for BC was 27.6% for the week of December 27 – January 2, 2021. This represents an increase of +5.3 points from the previous week and a decrease of -23.6 points compared to a similar period in 2019/20.
- This was the highest occupancy rate among all provinces in Canada.
- BC's average daily rate (ADR) was \$158.81 for the week of December 27 – January 2, 2021. This is an +11.8% increase over the previous week, and a -31.2% decrease compared to a similar period in 2019/20.



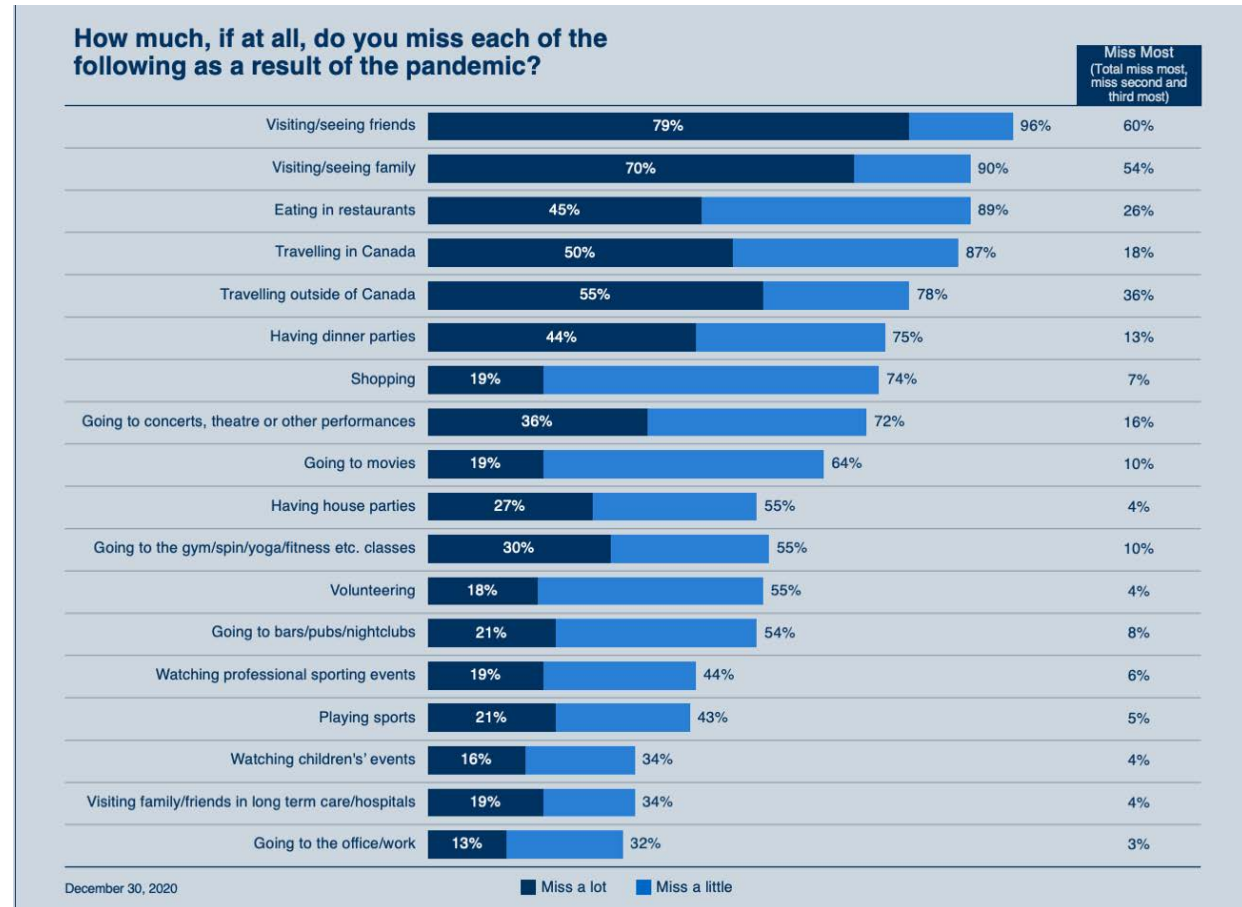
BC's average daily rate (\$158.81) up from the previous week

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BC residents miss visiting family and friends, restaurants, and travel

- A recent survey by Insights West shows that the pre-COVID-19 activities BC residents miss most include visiting family and friends, eating in restaurants, and travelling:
- 96% of BC residents miss visiting friends, while 90% miss visiting family
- 89% miss eating in restaurants
- 87% miss travelling in Canada
- 78% miss travelling outside of Canada
- 72% miss going to concerts, theatres or other performances





Source: [Insights West, December 30, 2020](#)

71% of Canadians intend to get a COVID-19 vaccine in 2021

- A survey by Leger shows that 71% of Canadians intend to get a COVID-19 vaccine in 2021.
- In 2021, 58% believe the Canada-US border will re-open for regular travel. 34% intend to take a vacation outside Canada. And 29% intend to attend a live concert or sporting event.
- Over the recent holidays, 48% of Canadians visited their friends/family.

CTC479. For many, 2020 represented a year of things we could not do. Thinking ahead to next year, 2021, are the following things going to happen? Some of these things are about you and some are things that might occur where you live.

Base: All respondents

			
	TOTAL CANADA	TOTAL USA	Gap
Weighted n =	1,528	1,001	
Unweighted n =	1,528	1,001	
% Yes presented			
I will get the COVID vaccine	72%	51%	21
I will do more exercise	65%	60%	5
Pay more taxes	59%	39%	20
The Canada-US Border will re-open for regular travel	58%	55%	3
I will be hosting family and friends again for receptions and parties	54%	35%	19
Canada will have a new Prime Minister	36%	22%	14
I will take a vacation outside Canada/the United States	34%	19%	15
I will go on a diet	32%	33%	1
A Canadian/American team will win the Stanley Cup in hockey	31%	37%	6
I will attend a live concert or sporting event	29%	26%	3
Vice President Kamala Harris will be President of the United States	26%	32%	6
I will change jobs	16%	18%	2
I will buy a house	9%	13%	4
I will find a partner on a dating site/app	9%	11%	2
I will start a new business	8%	13%	5
I will have a baby	5%	8%	3
I will get married	4%	8%	4
I will get divorced	2%	5%	3

Source: [Leger, January 4, 2021](#)

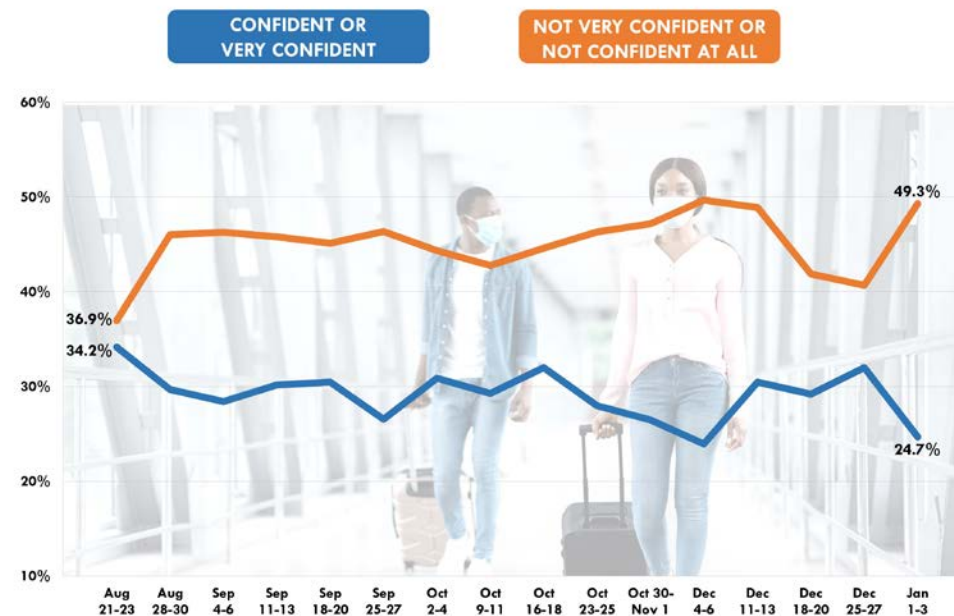


Almost half of Americans do not feel safe to travel, but inspiration is high

- Destination Analysts, a US-based tourism research company, found in a recent survey that almost half of Americans are not confident that they can travel safely in the current climate.
- 52.6% of Americans are highly open to travel inspiration, while the proportion of American travellers who say that they will avoid travel until vaccines are widely available has decreased to 46.7%. 60.1% of Americans say they will take a vaccine, the highest reported yet.
- Almost 40% of American travellers say they have day-dreamed about taking a trip in the last week. A third have gone as far as to talk to a friend or relative about a future trip. Almost 25% of American travellers have researched travel ideas online in the past week.

CONFIDENCE IN ABILITY TO TRAVEL SAFELY RIGHT NOW

AUGUST 21, 2020 – JANUARY 3, 2021



QUESTION: HOW CONFIDENT ARE YOU THAT YOU CAN TRAVEL SAFELY IN THE CURRENT ENVIRONMENT?

(Base: Wave 24-34 and 39-43 data. All respondents, 1,202, 1,246, 1,222, 1,205, 1,200, 1,205, 1,203, 1,203, 1,204, 1,203, 1,203, 1,204, 1,206, 1,201, 1,207 and 1,206 completed surveys.)

Destination Analysts
DO YOUR RESEARCH



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

Skift reports that nimble operators and leisure travel will outperform institutions and business

- Skift Research's Global Travel Outlook for 2021 has declared that short-term rentals, leisure, emerging markets, and domestic travel will outperform hotels, business, developed markets, and inbound travel.
- Skift states that travel themes in 2021 include:
 - an uneven global economic recovery
 - more normalized travel than expected
 - leisure outperforming business but business travel's eventual recovery
 - plentiful capital
 - considerable change
 - the inevitable return of travel

Outperform		Underperform	
Short-Term Rentals	✓	↔ Hotels	✗
Third-Party Distribution	✓	↔ First-Party Distribution	✗
Leisure	✓	↔ Business	✗
Emerging Markets	✓	↔ Developed Markets	✗
Domestic Travel	✓	↔ Inbound Travel	✗
Soft Brands & Platforms	✓	↔ Hard Brands	✗
Branded Hotels	✓	↔ Independent Hotels	✗
Economy Hotels	✓	↔ Upscale Hotels (but not Luxury)	✗
Low Cost Carriers	✓	↔ Network Airlines	✗



Source: [Skift Research Global Travel Outlook 2021](#), Skift, December 2020

Cirium's Airline Insights Review 2020 says 7 key trends may emerge as a result of airline industry's shift

- Cirium's Airline Insights Review for 2020 summarize the year by saying that “airlines worldwide struggled to match their schedules with travel demand, performing surgery as close as four weeks before travel”.
- They forecasted seven key trends as a result of the airline industry's shift, which are:
 1. Consolidation of airlines
 2. New-generation aircraft in service
 3. Aircraft retirement and reconfigurations
 4. A new way to forecast demand
 5. Airline operational flexibility
 6. Digital traveller experience
 7. The rise of aircraft leasing



Source: [Airline Insights Review 2020, Cirium, December 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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