

COVID-19 Research Roundup

January 18, 2021

Farwell Canyon, Cariboo Chilcotin Coast

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, 2020, 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.

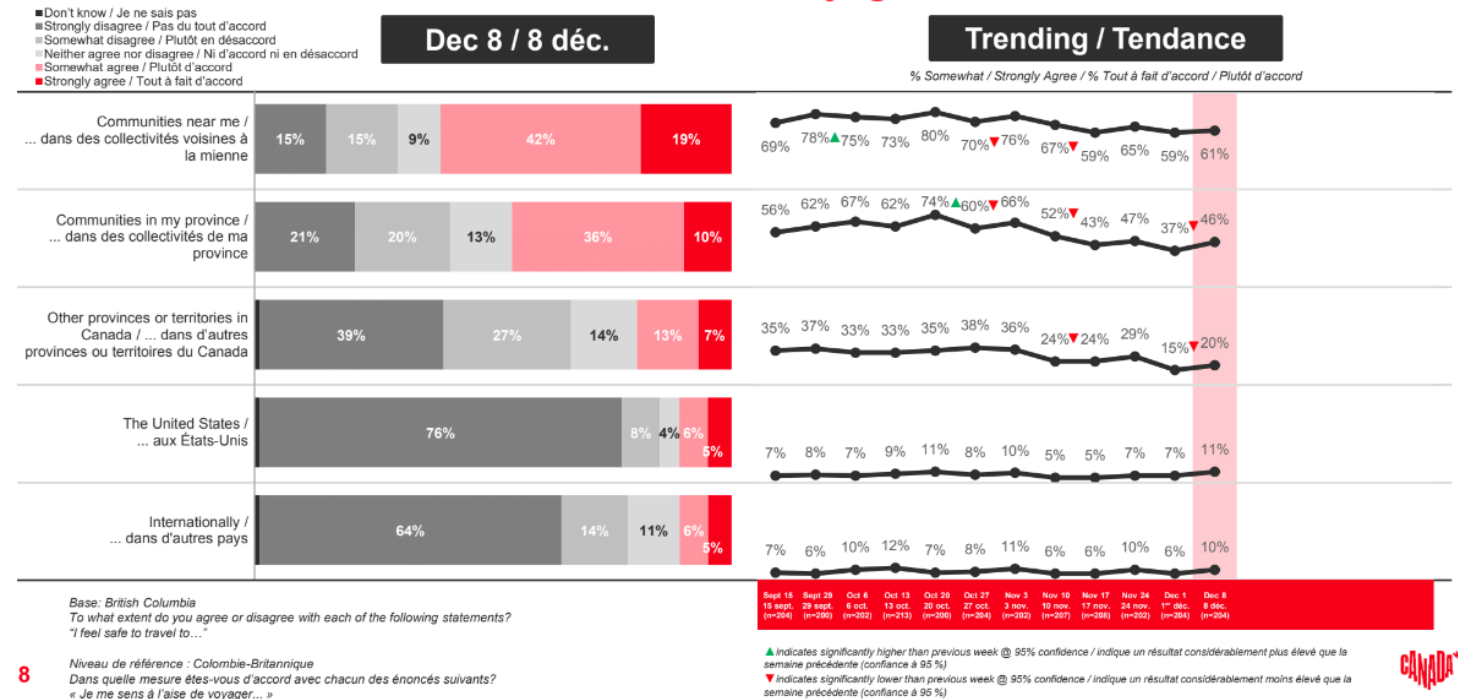
Last week in brief:

- 61% of BC residents feel safe travelling to nearby communities
- BC resident's interest in travel decreased over the holidays
- BC sees a decrease of -12.6% in weekly domestic overnight visitation compared to previous week
- Weekly movement in BC is down -19.7% compared to same period in 2020
- BC's weekly occupancy rate (27.4%) down -0.2 points from previous week
- BC's average daily rate (\$124.63) down -21.5% from previous week
- Tourism HR reports a loss of 51,200 BC tourism and hospitality sector jobs in December 2020 compared to December 2019
- Canada's accommodation and food services employment in Canada falls for third straight month
- American travellers report all time pandemic-high on positive travel sentiments
- Travel Megatrends to 2025 include introspective travel, a hotel resurgence, and "humbled airlines"
- COTRI Analytics forecasts international trips from Mainland China to exceed 2019 volume by 2022
- Tourism and COVID-19 dashboard and reporting resources

61% of BC residents feel safe travelling to nearby communities

- In Destination Canada's Wave 28 (January 5, 2021) report, 61% of British Columbians said they would feel safe travelling to nearby communities, with 46% of British Columbians stating they would feel safe to travel to communities in the rest of the province.
- Only 20% of BC residents would travel to other provinces or territories in Canada, 11% to the United States, and 10% to international countries.

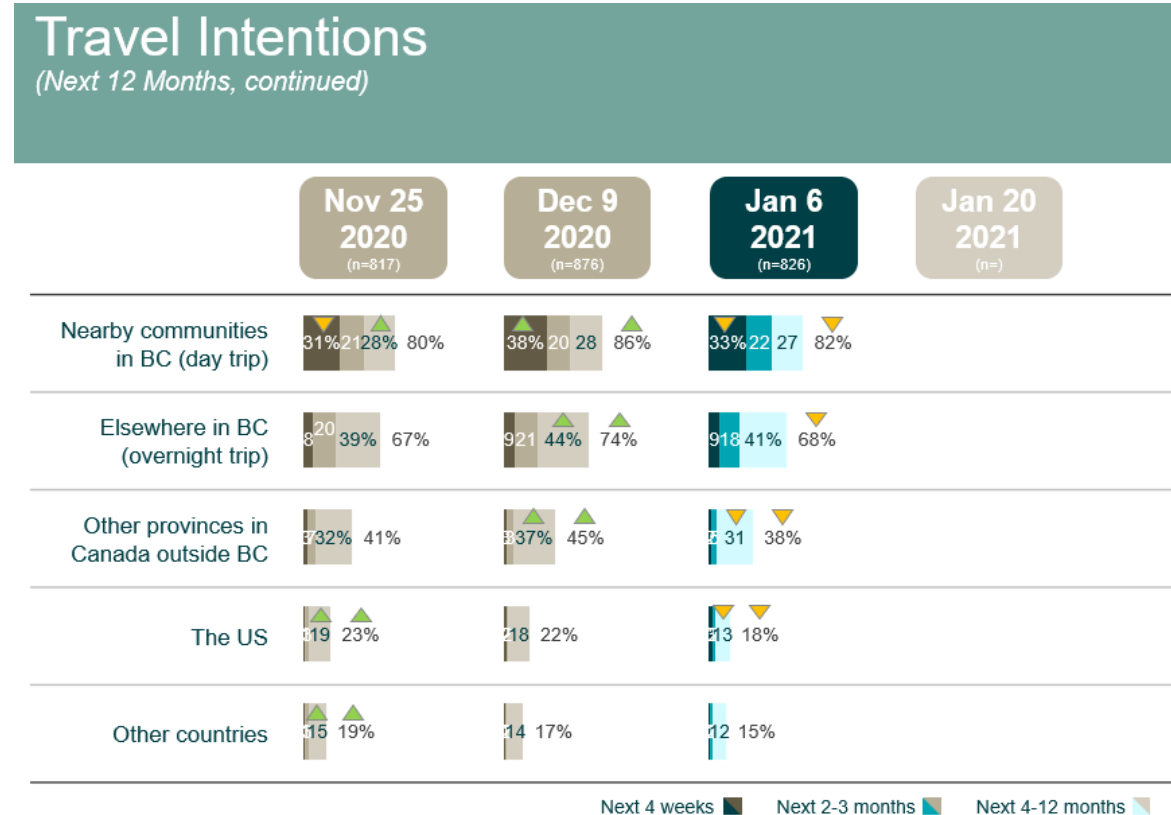
British Columbia / Colombie-Britannique I feel safe to travel / Je me sens à l'aise de voyager



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

BC residents' interest in travel decreased over the holidays

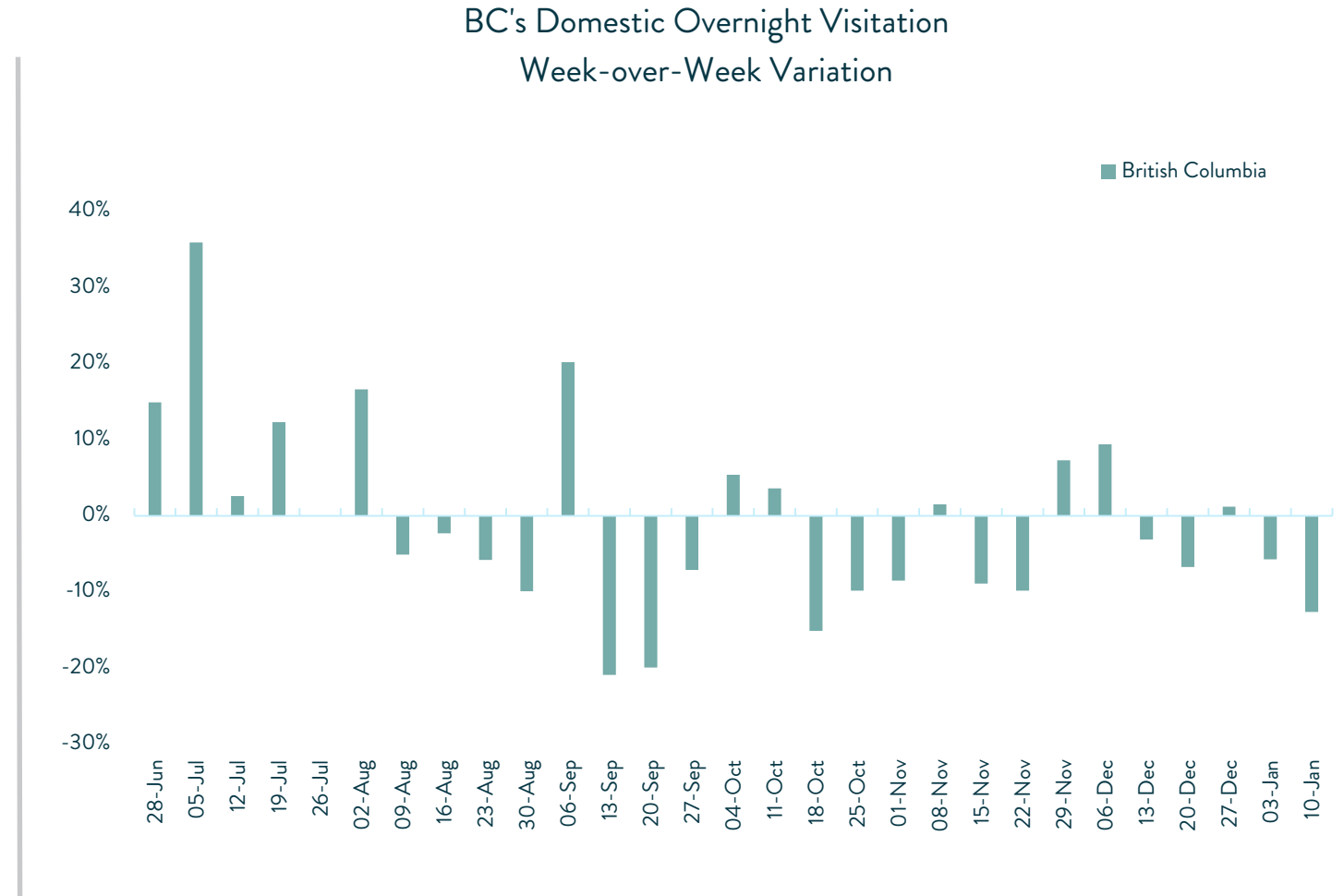
- Wave 17 (January 12, 2021) of Destination BC's BC Residents' Public Perceptions survey shows that BC residents' travel intentions have decreased from the previous wave (December 9, 2021).
- 82% of BC residents intend to travel to nearby communities in the next 12 months, with 68% to the rest of BC. Both of which are down from the previous wave (from 86% and 74%, respectively).
- 38% of residents intend to travel to other provinces in Canada and 18% to the US (both down from the previous wave), and 15% to other countries.



Source: [Destination BC's BC Residents' Public Perceptions: COVID-19 Travel and Tourism Wave 17, Insights West, January 6, 2021](#)

BC sees a decrease of -12.6% in weekly domestic overnight visitation compared to previous week

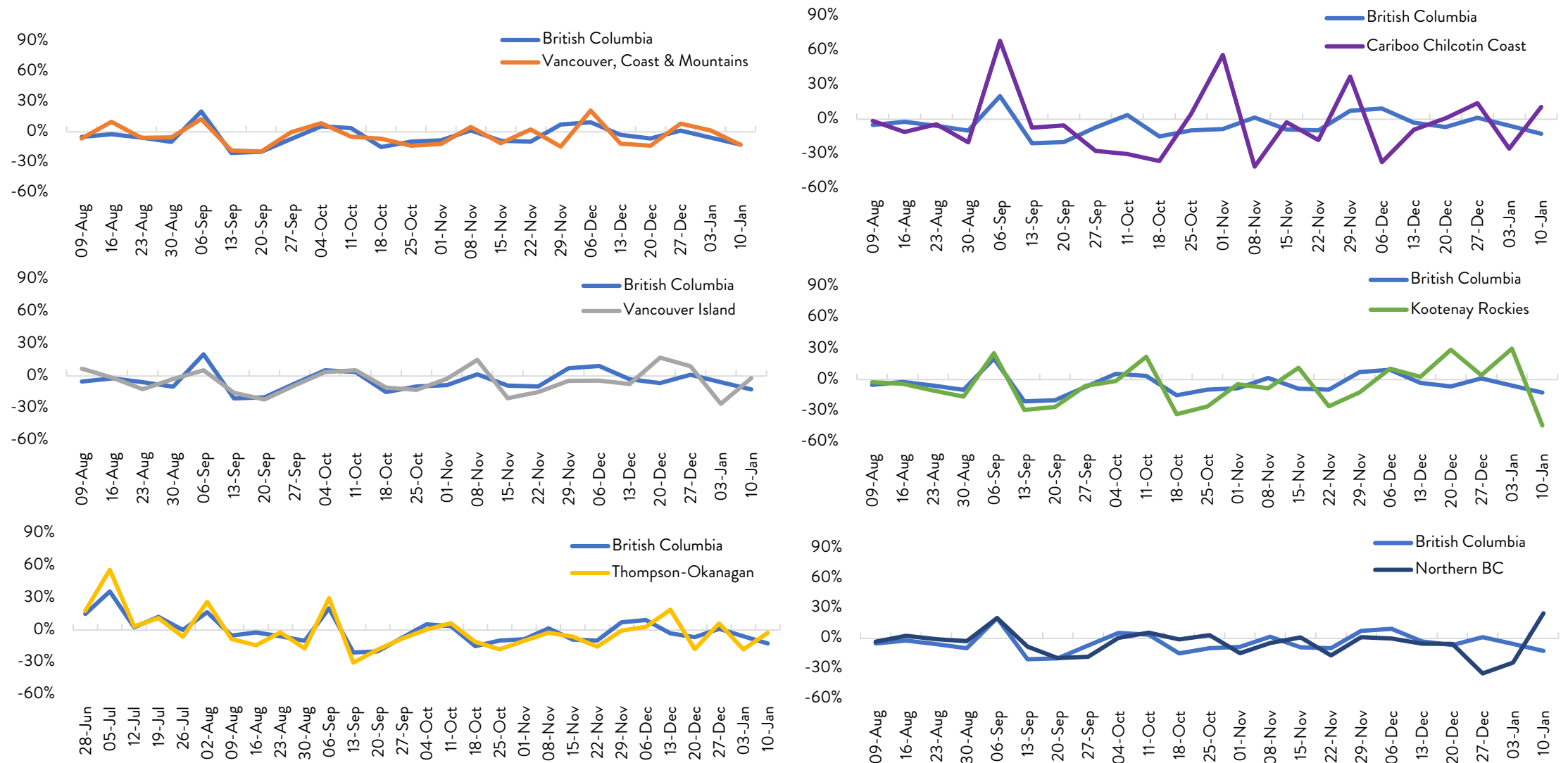
- According to Environics Analytics Weekly COVID Tracker Report, during the week ending January 10, 2021, BC experienced a week-over-week decrease (-12.6%) in weekly domestic overnight visitation.
- Week-over-week decreases in movement in domestic overnight visitation were seen mostly throughout the province:
 - Kootenay Rockies (-44.3%)
 - Vancouver, Coast & Mountains (-12.9%)
 - Thompson Okanagan (-2.6%)
 - Vancouver Island (-2.0%)
- However, week-over-week increases in domestic overnight visitation were seen in Northern BC (+24.8%) and the Cariboo Chilcotin Coast (+10.7%).



Source: [Environics Analytics Weekly COVID Tracker Report, January 10, 2021](#)

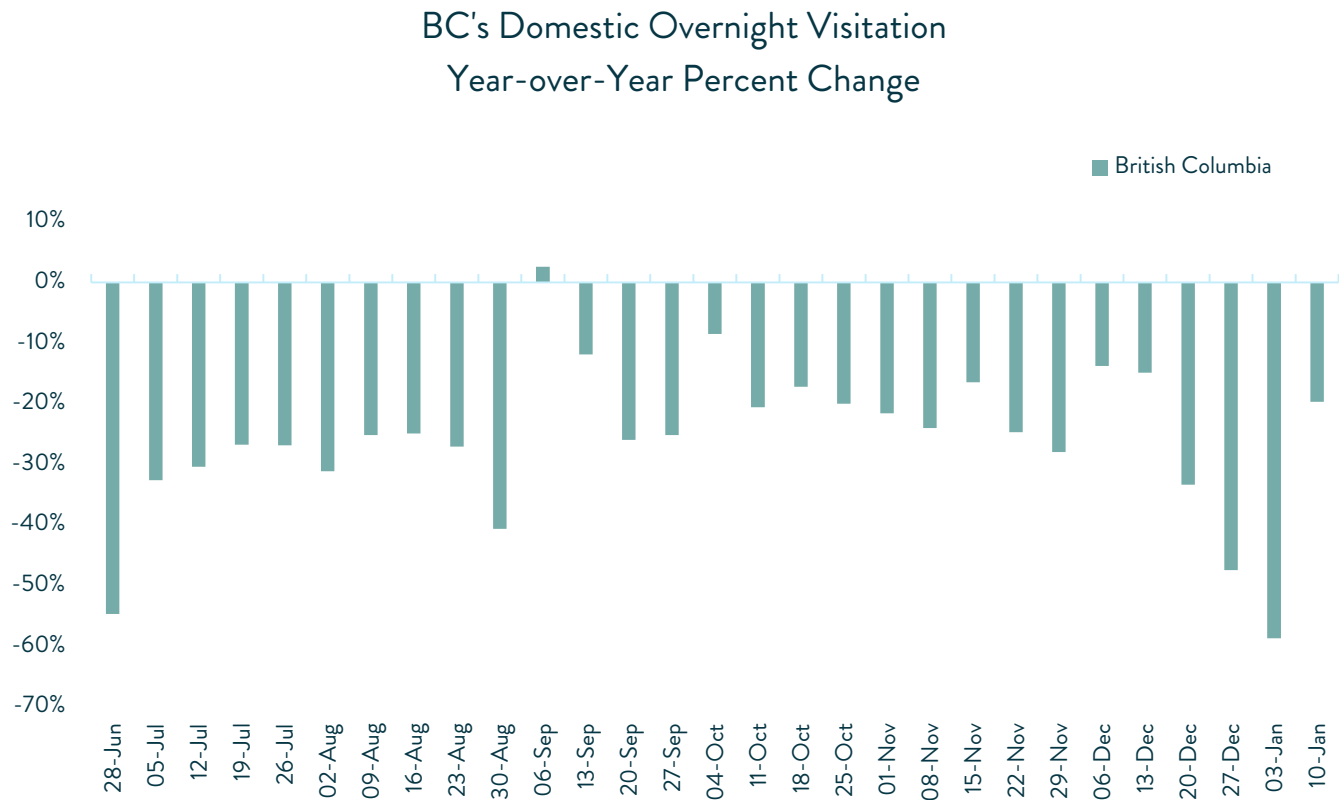


BC and Regional Domestic Overnight Visitation Week-over-Week Variation



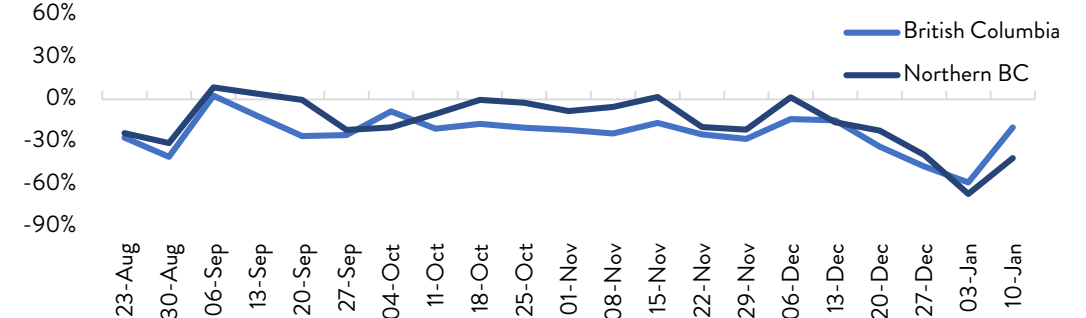
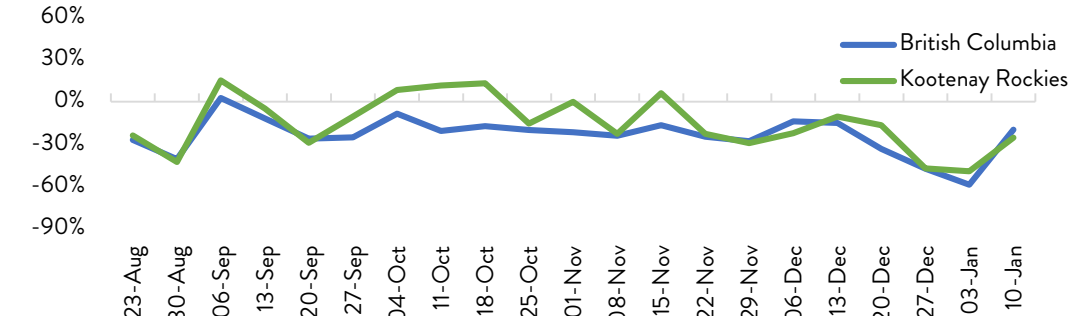
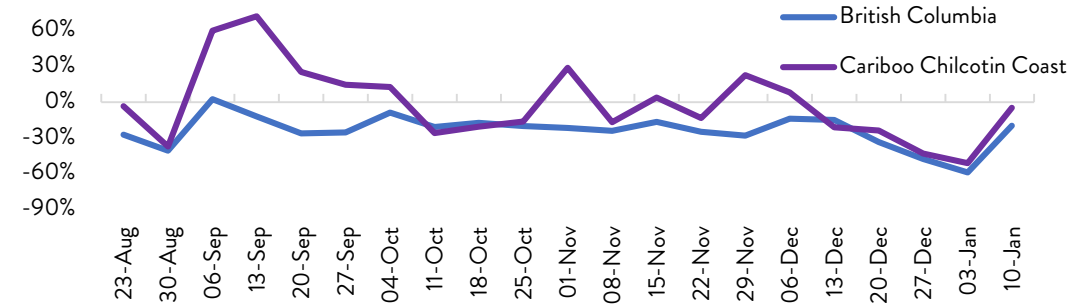
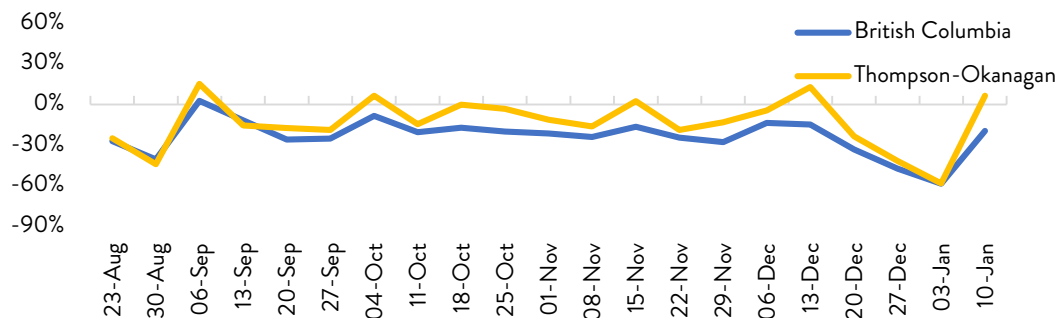
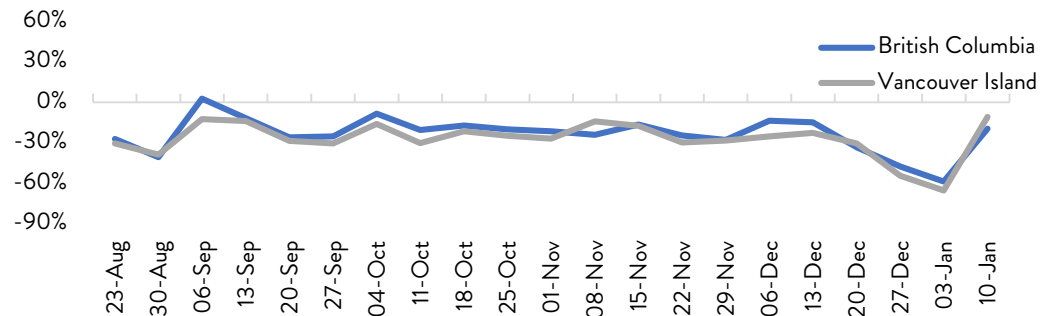
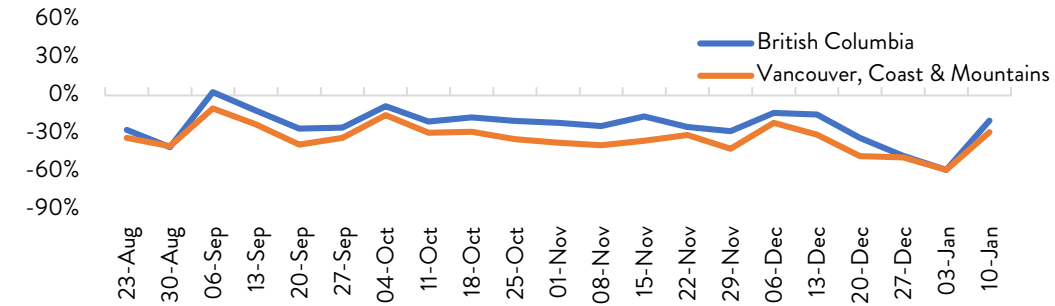
Weekly movement in BC is down -19.7% compared to same period in 2020

- Environics Analytics also reports year-over-year analysis in the Weekly COVID Tracker Report.
- For the week ending January 10, 2021, weekly domestic overnight visitation was down (-19.7%) compared to the same week in 2020.
- A year-over-year decrease in weekly visitation was seen for nearly all tourism regions:
 - Northern BC (-41.6%)
 - Vancouver, Coast & Mountains (-28.8%)
 - Kootenay Rockies (-25.5%)
 - Cariboo Chilcotin Coast (-4.5%)
 - Vancouver Island (-10.9%)
- However, a year-over-year increase in weekly domestic overnight visitation was seen for the Thompson Okanagan (+6.4%).



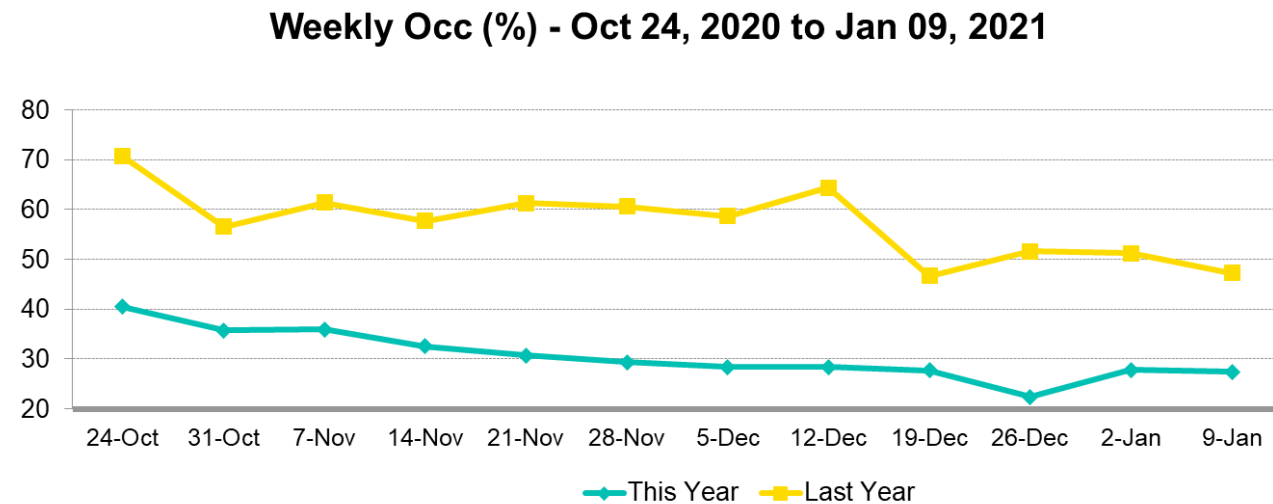
Source: [Environics Analytics Weekly COVID Tracker Report, January 10, 2021](#)

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



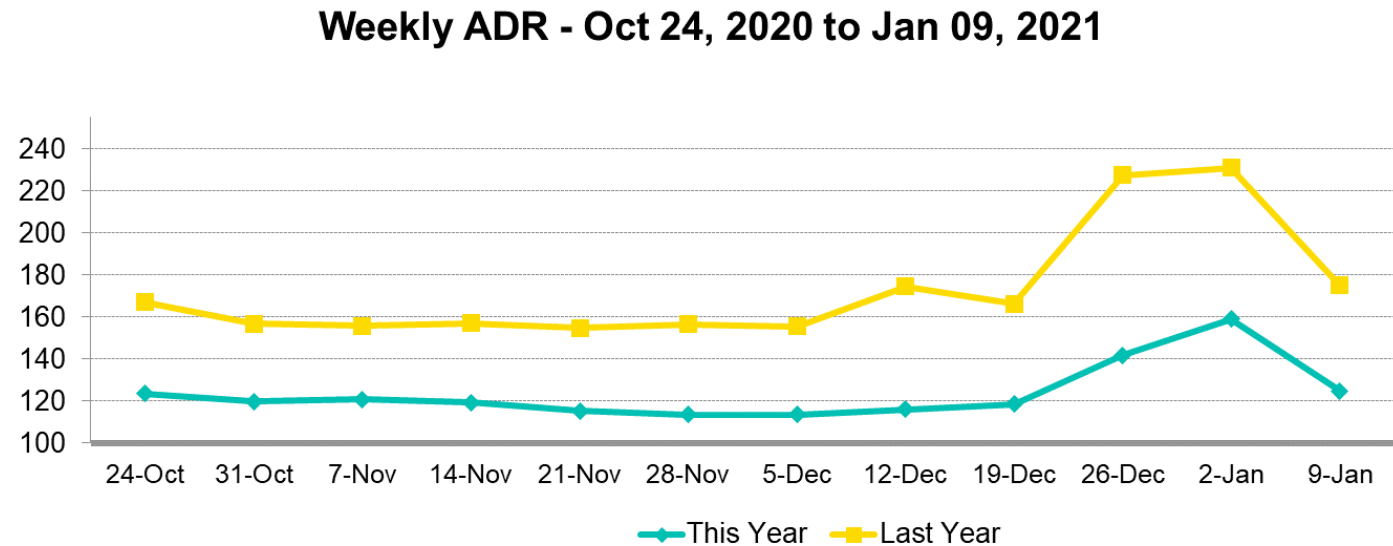
BC's weekly occupancy rate (27.4%) down -0.2 points from previous week

- STR, an agency which captures BC hotel performance, shows the average weekly occupancy for BC was 27.4% for the week of January 3 – 9, 2021. This represents a decrease of -0.2 points from the previous week and a decrease of -19.9 points compared to a similar period in 2020.
- This was the highest occupancy rate among all provinces in Canada.



BC's average daily rate (\$124.63) down -21.5% from the previous week

- STR, an agency which captures BC hotel performance, shows BC's average daily rate (ADR) was \$124.63 for the week of January 3 – 9, 2021. This represents a decrease of -21.5% from the previous week and a decrease of -28.7% compared to a similar period in 2020.



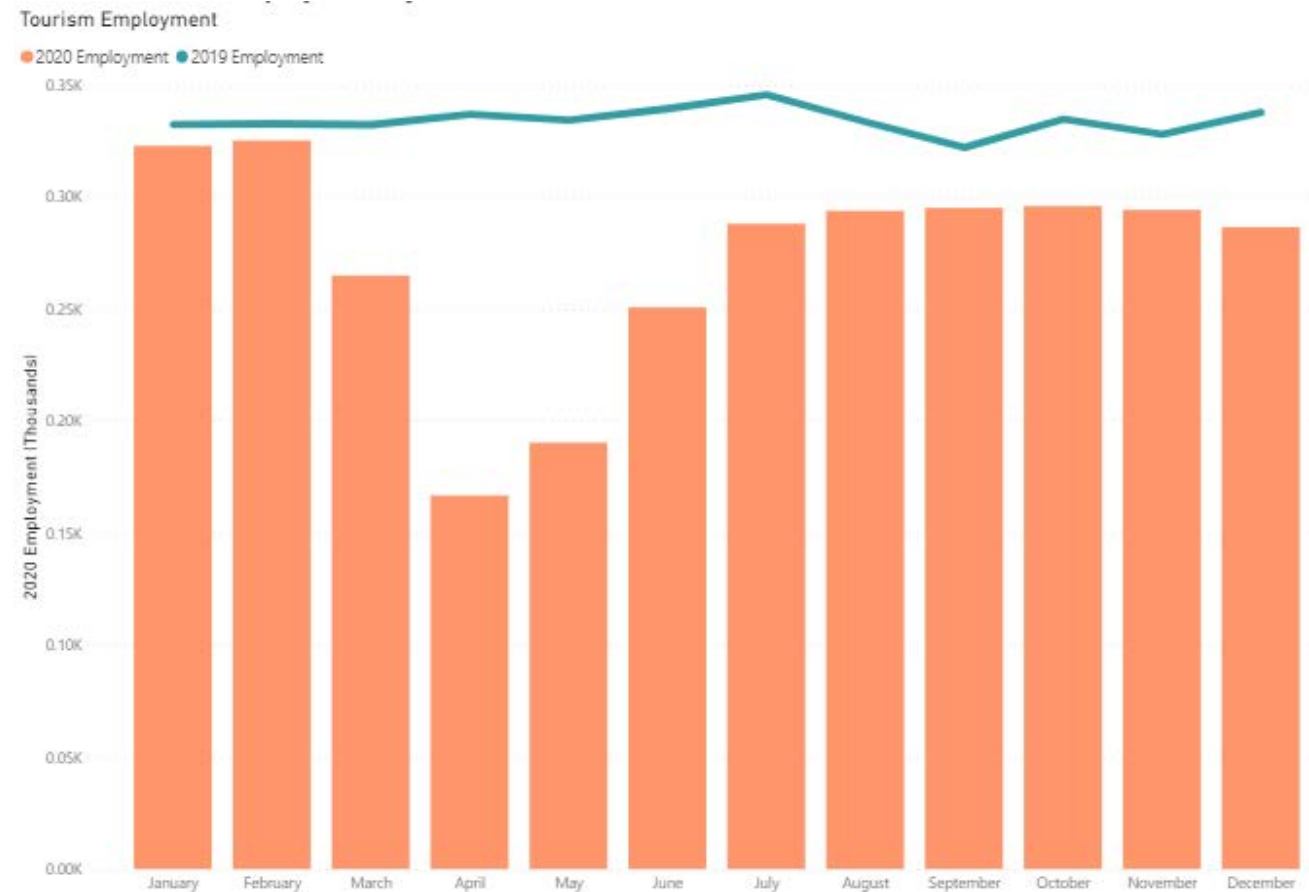
British Columbia's Hotel Occupancy Rate and Average Daily Room Rate

	Jan. 3 - 9, 2021 Occupancy Rate	Week-over-Week Jan. 3 - 9, 2021 vs. Dec. 27 - Jan. 2, 2021 Occupancy Rate Point Change	Year-over-Year Jan. 3 - 9, 2021 vs. Jan. 5 - 11, 2020 Occupancy Rate Point Change	Jan. 3 - 9, 2021 ADR	Week-over-Week Jan. 3 - 9, 2021 vs. Dec. 27 - Jan. 2, 2021 ADR Percent Change	Year-over-Year Jan. 3 - 9, 2021 vs. Jan. 5 - 11, 2020 ADR Percent Change
British Columbia	27.4%	-0.2	-19.9	\$124.63	-21.5%	-28.7%
Vancouver (City of)	15.6%	-8.3	-36.0	\$131.13	-19.5%	-32.8%
Whistler	30.3%	-16.7	-49.5	\$317.15	-30.0%	-33.0%
Victoria	27.5%	+7.5	-5.9	\$108.34	-28.0%	-13.7%
Kelowna	21.3%	-0.2	-16.8	\$97.47	-7.5%	-21.5%
Kamloops	25.6%	+2.7	-5.4	\$88.13	+0.7%	-7.8%
Richmond	40.7%	+6.2	-25.0	\$124.26	+2.0%	-21.4%



Tourism HR reports a loss of 51,200 BC tourism and hospitality sector jobs in December 2020 from December 2019

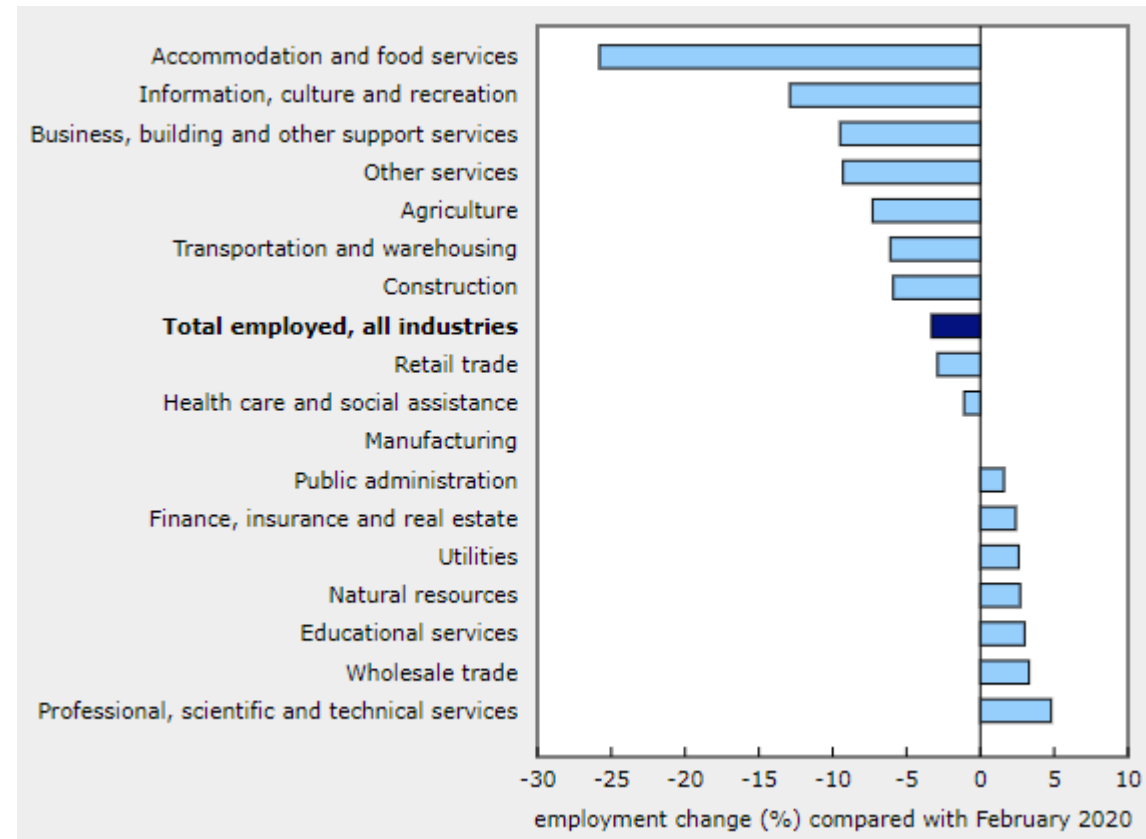
- Through the Labour Force Survey conducted by Statistics Canada, Tourism HR Canada has shown that employment in the tourism and hospitality sector in British Columbia dropped from 337,800 in December 2019 to 286,600 in December 2020. This is a decrease of 51,200 jobs.



Source: [Tourism Employment Tracker, Tourism HR, December, 2020](#)

Canada's accommodation and food services employment falls for third straight month

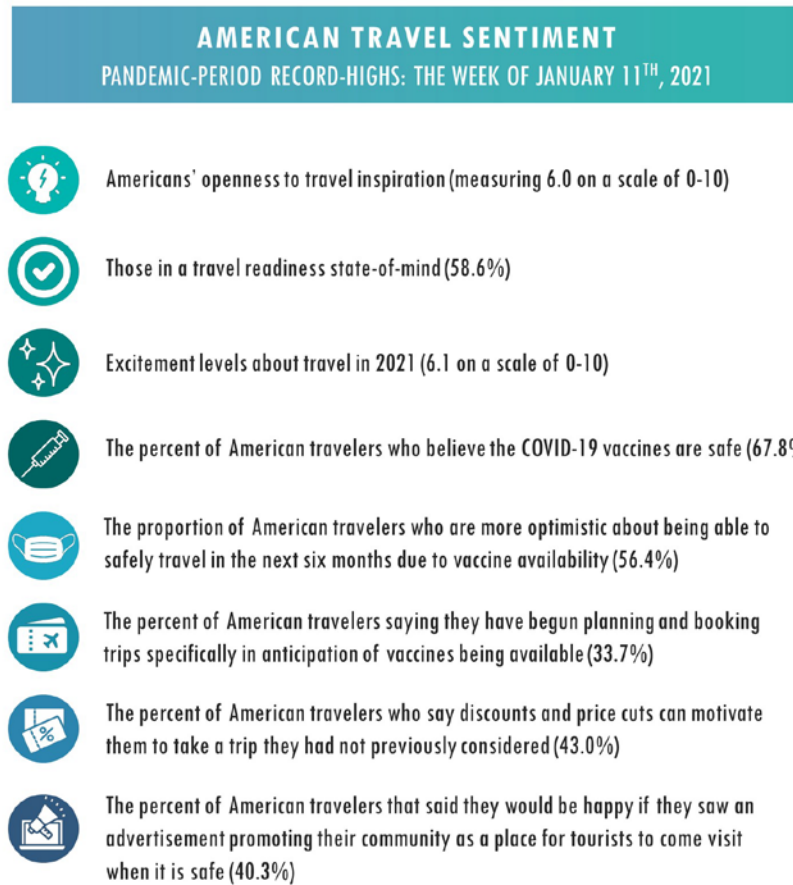
- The latest Statistics Canada Labour Force Survey (December 2020) revealed that general employment in Canada fell for the first time since April 2020. This decline included the first employment decline for the services-producing sector since April 2020. Also, this is the third straight month with a loss in employment for the accommodation and food services sector and the second for information, culture and recreation.
- Labour market conditions vary across provinces, reflecting differences such as public health measures. However, the total unemployment rate was essentially unchanged at 8.6%.
- In addition, youth employment fell further from pre-COVID levels.



Source: [Labour Force Survey, Statistics Canada, December 2020](#)

American travellers report all time pandemic-high on positive travel sentiments

- Destination Analysts, a US-based tourism research company, found that a number of travel sentiment metrics are at a pandemic-period high. These include:
 - Americans' openness to travel inspiration
 - Those in a travel readiness state of mind
 - Excitement levels about travel in 2021
 - The percent of American travellers who believe the COVID-19 vaccines are safe
- 48.9% of American travellers expect to take at least one trip as of January 10, up from 37.5% on January 4.



Travel Megatrends to 2025 include introspective travel, a hotel resurgence, and “humbled airlines”

Skift has released their new travel Megatrends for 2021 to 2025:

- Travel’s New Cadence Is More Deliberate, Introspective and Soulful
- Backyard Tourism Is On a Pedestal But Far-Flung Exploration Recovers
- Hotels Are Back With Big Upsides for Owners Who Stuck Out the Hard Times
- Work From Anywhere Spurs a New Type of Business Travel
- Asia Bulks Up Even As It Looks Inward
- Travel Sectors Get Scrambled, Definitions Blur
- The Subscription Model Becomes a Staple of Travel Industry Renewal
- Humbled Airlines Back Away From Any Brash New Ventures
- Cruise Lines Partner, Prune and Take Refuge In Their Private Islands
- The Rise of Global Mobile Wallets Upends Travel Payments
- The Robots You See and the Ones You Don’t Accelerate Automation
- More Mainstream Short-Term Rentals Cope With New Headwinds
- Product Mediocrity Seeds a New Era of Travel Industry Disruption
- Renewed Strength Matters in 2025

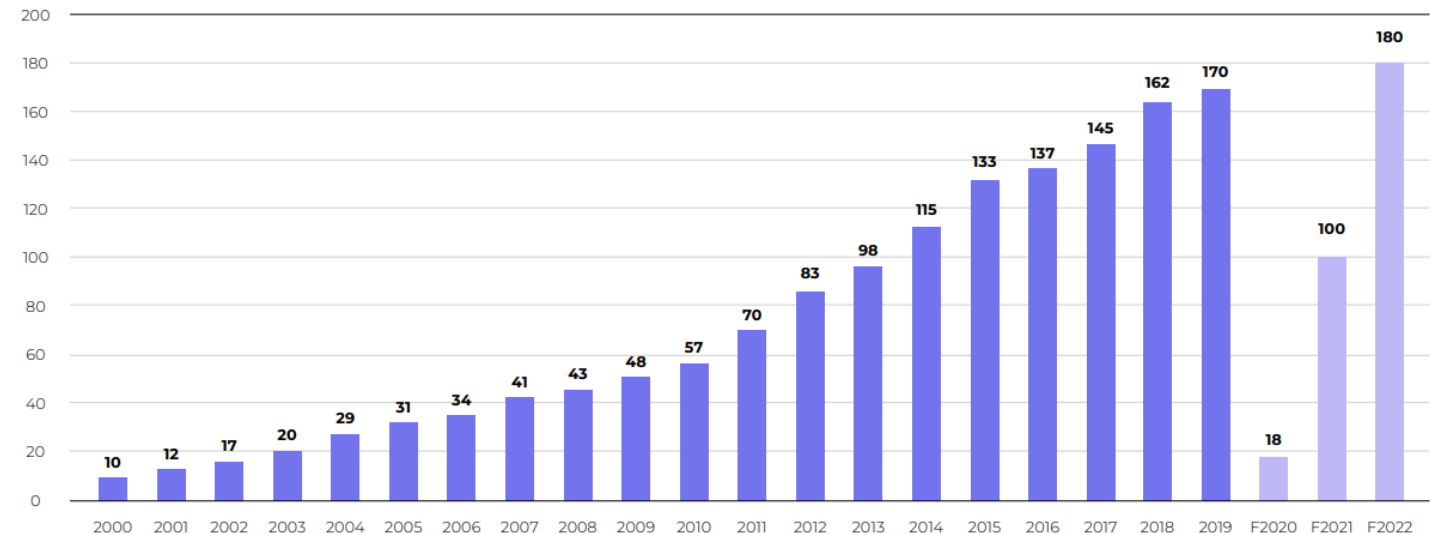


Source: [Skift Megatrends 2025, January 2021](#)

COTRI Analytics forecasts international trips from Mainland China to exceed 2019 volume by 2022

- COTRI Analytics forecasted a total of 18 million international trips from Mainland China in 2020, representing about 10% of the number of trips for 2019.
- The forecast shows COVID-19 recovery to exceed 2019 border crossings by 2022, with around 100 million international trips taken by Chinese citizens in 2021 and 180 million in 2022.

Border Crossings from Mainland China in Millions



Source: [COTRI Analytics](#)

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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