

COVID-19 Research Roundup

January 25, 2021

Myra Canyon, Thompson Okanagan

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:

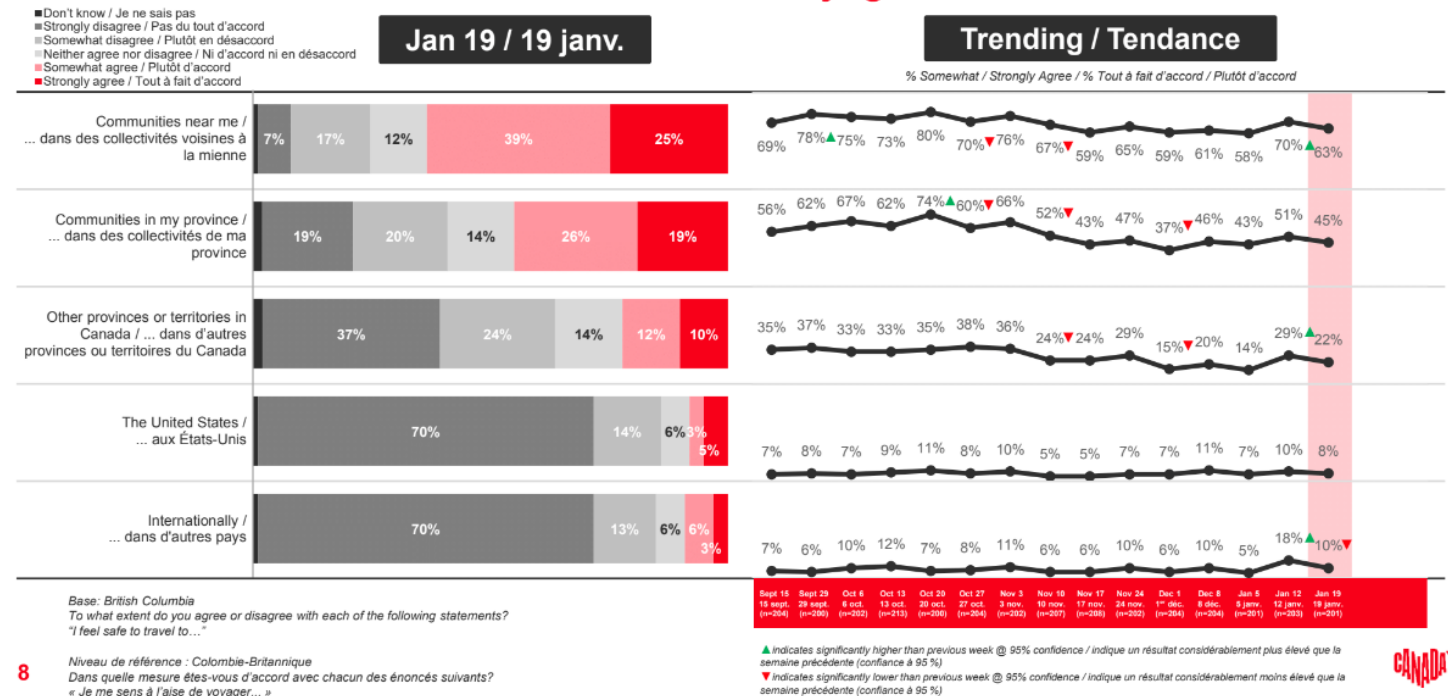
- 63% of BC residents feel safe travelling to nearby communities
- Concern of being exposed/contracting COVID-19 continues to be the greatest barrier for BC residents to consider BC travel in the next 3 months
- BC sees a decrease of -2.8% in weekly domestic overnight visitation compared to previous week
- Weekly movement in BC is down -18.0% compared to same period in 2020
- BC's weekly occupancy rate (30.3%) up +2.9 points from previous week
- BC's average daily rate (\$117.92) down -5.4% from the previous week
- Over half of Americans plan on visiting friends and relatives for their first trip
- Over half of American travellers perceive tourism activities as safe
- New ski dashboard by US Travel Association shows US ski mountain visitation
- PATA estimates Asia Pacific's best-case recovery of international visitor arrivals by 2023
- WTTC predicts 84 to 111 million tourism jobs to return in 2021
- Euromonitor releases their top 10 consumer trends for 2021
- Tourism and COVID-19 dashboard and reporting resources

63% of BC residents feel safe travelling to nearby communities

- In Destination Canada's Wave 30 (January 19, 2021) report, 63% of British Columbians stated they would feel safe travelling to nearby communities, down from 70% last week, and 45% of British Columbians stated they would feel safe to travel to communities in the rest of the province, down from 51%.
- 22% of BC residents would feel safe to travel to other provinces or territories in Canada, down from 29%, and 8% would feel safe to travel to the United States and 10% to international countries.

British Columbia / Colombie-Britannique

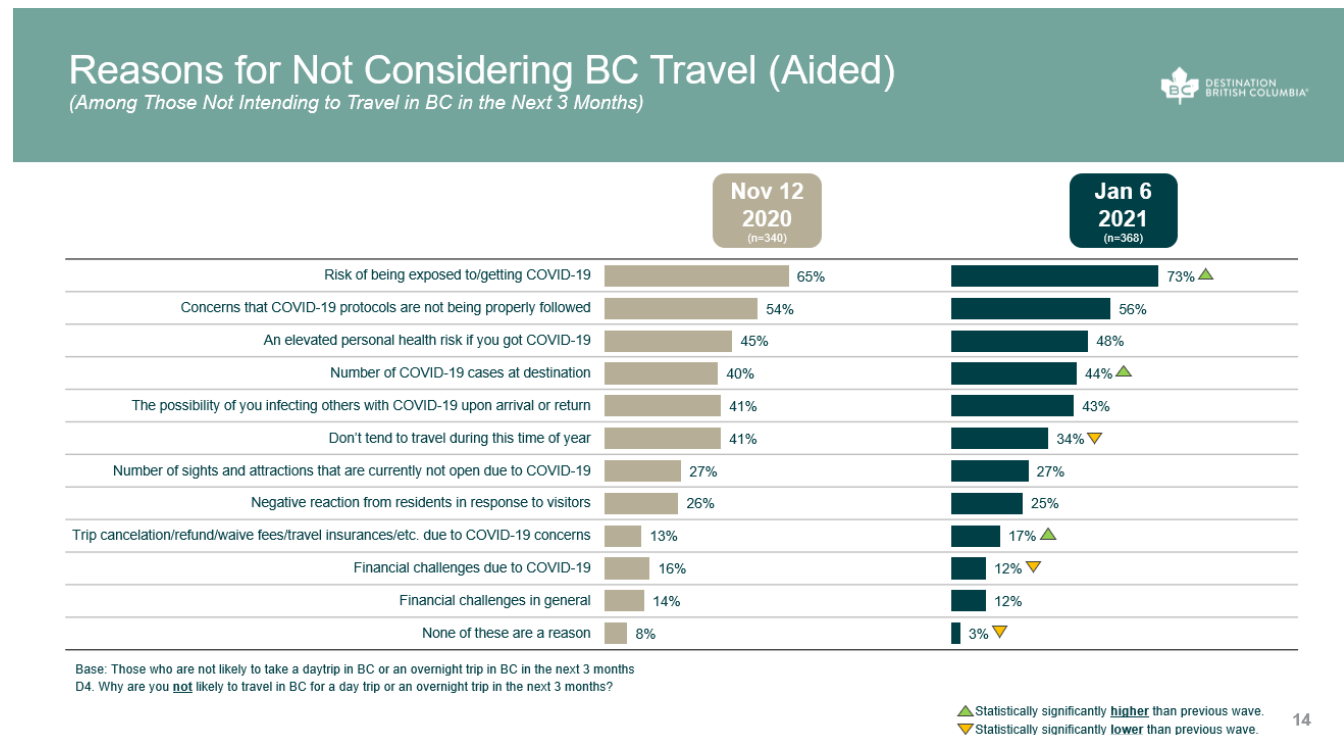
I feel safe to travel / Je me sens à l'aise de voyager



Source: [Destination Canada's Weekly Resident Sentiment, Wave 30, Leger, January 19, 2021](#)

Concern of being exposed/contracting COVID-19 continues to be the greatest barrier for BC residents to consider BC travel in the next 3 months

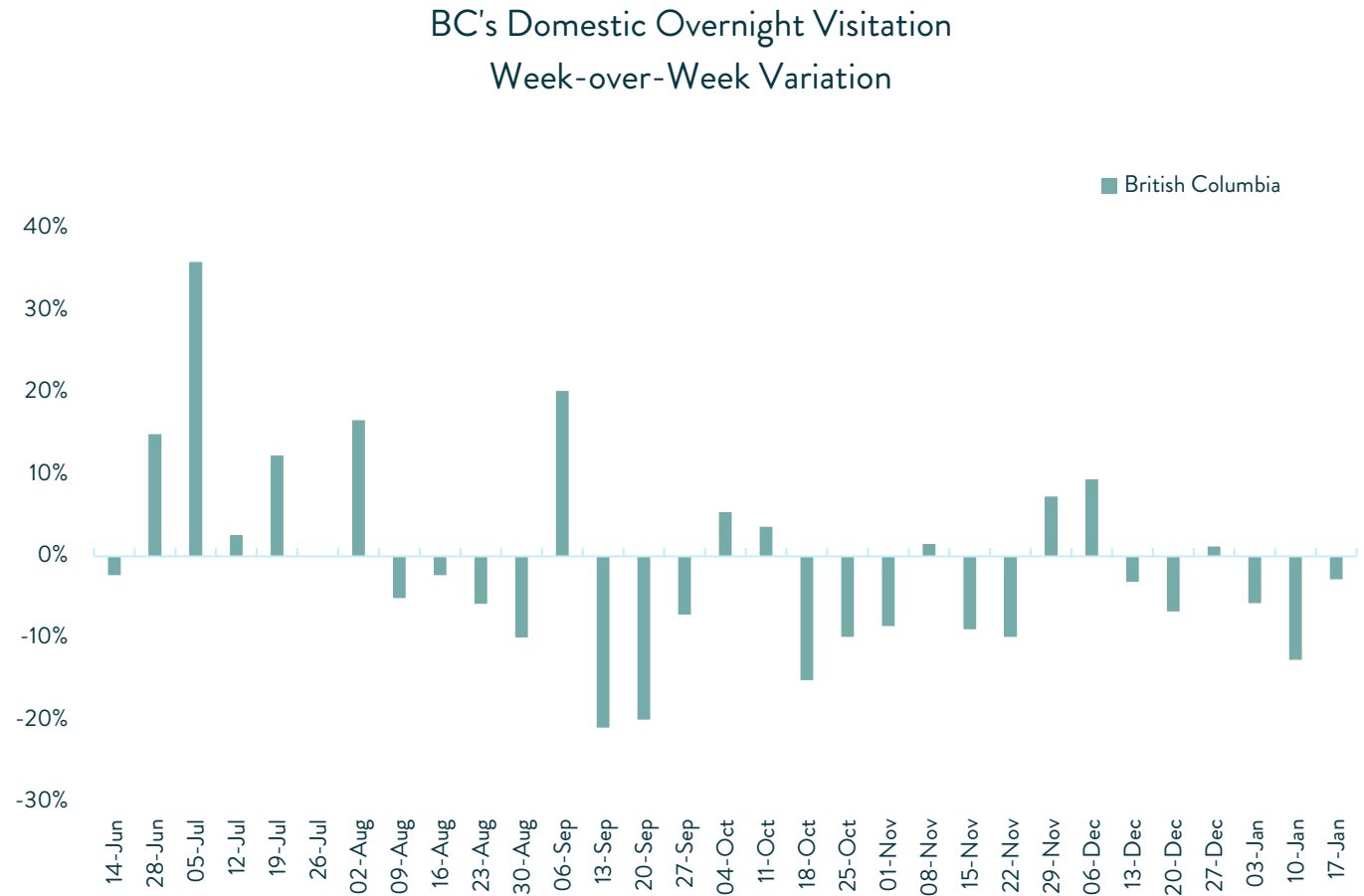
- In Wave 17 (January 6, 2021) of Destination BC's BC Residents' Public Perceptions survey, BC residents who would not consider travel in BC in the next 3 months or until a vaccine is available were asked, for the second time (initially mid-November), their reasons.
- 'Risk of being exposed to/contracting COVID-19' (73%) remains the greatest barrier to BC travel (up from 65% in mid-November).
- 'Concerns about COVID-19 protocols not being properly followed' also remains a significant factor (56%), but has not changed since mid-November.



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 -2.8% in weekly domestic overnight visitation compared to previous week

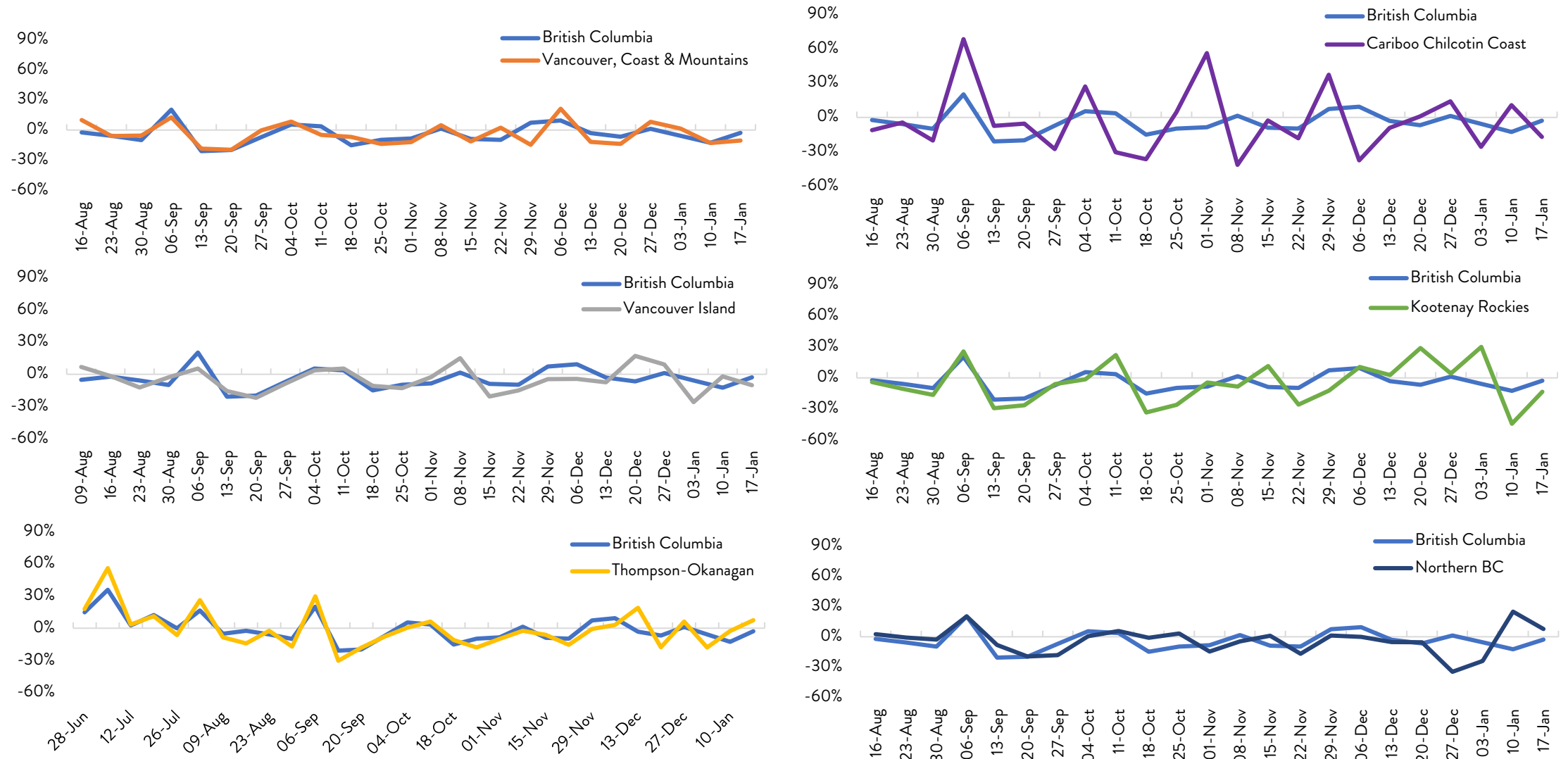
- According to Environics Analytics Weekly COVID Tracker Report, during the week ending January 17, 2021, BC experienced a week-over-week decrease (-2.8%) in weekly domestic overnight visitation.
- Week-over-week decreases in movement in domestic overnight visitation were seen in four tourism regions:
 - Cariboo Chilcotin Coast (-17.0%)
 - Kootenay Rockies (-13.4%)
 - Vancouver, Coast & Mountains (-10.5%)
 - Vancouver Island (-10.2%)
- However, week-over-week increases in domestic overnight visitation were seen in Northern BC (+7.6%) and the Thompson Okanagan (+7.6%).



Source: [Environics Analytics Weekly COVID Tracker Report, January 17, 2021](#)



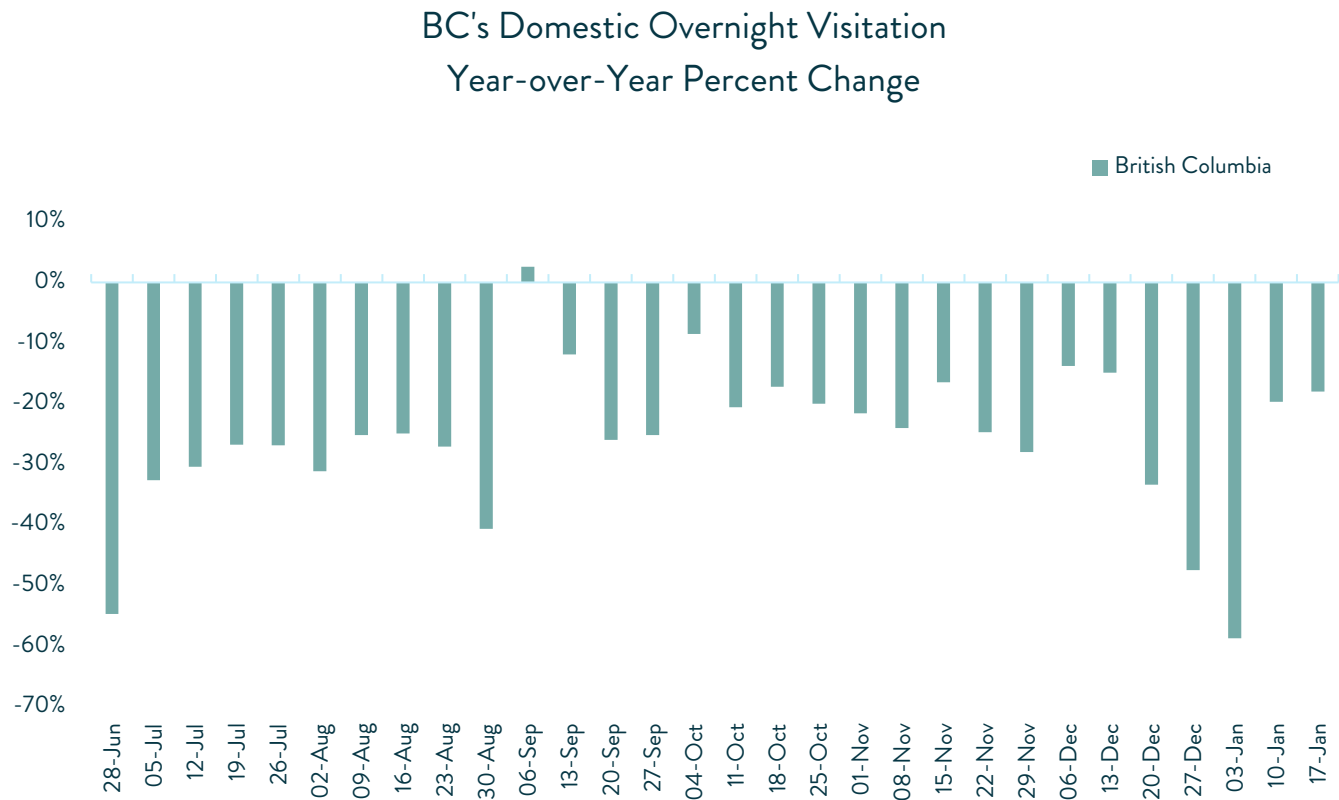
BC and Regional Domestic Overnight Visitation Week-over-Week Variation



Source: [Environics Analytics Weekly COVID Tracker Report, January 17, 2021](#)

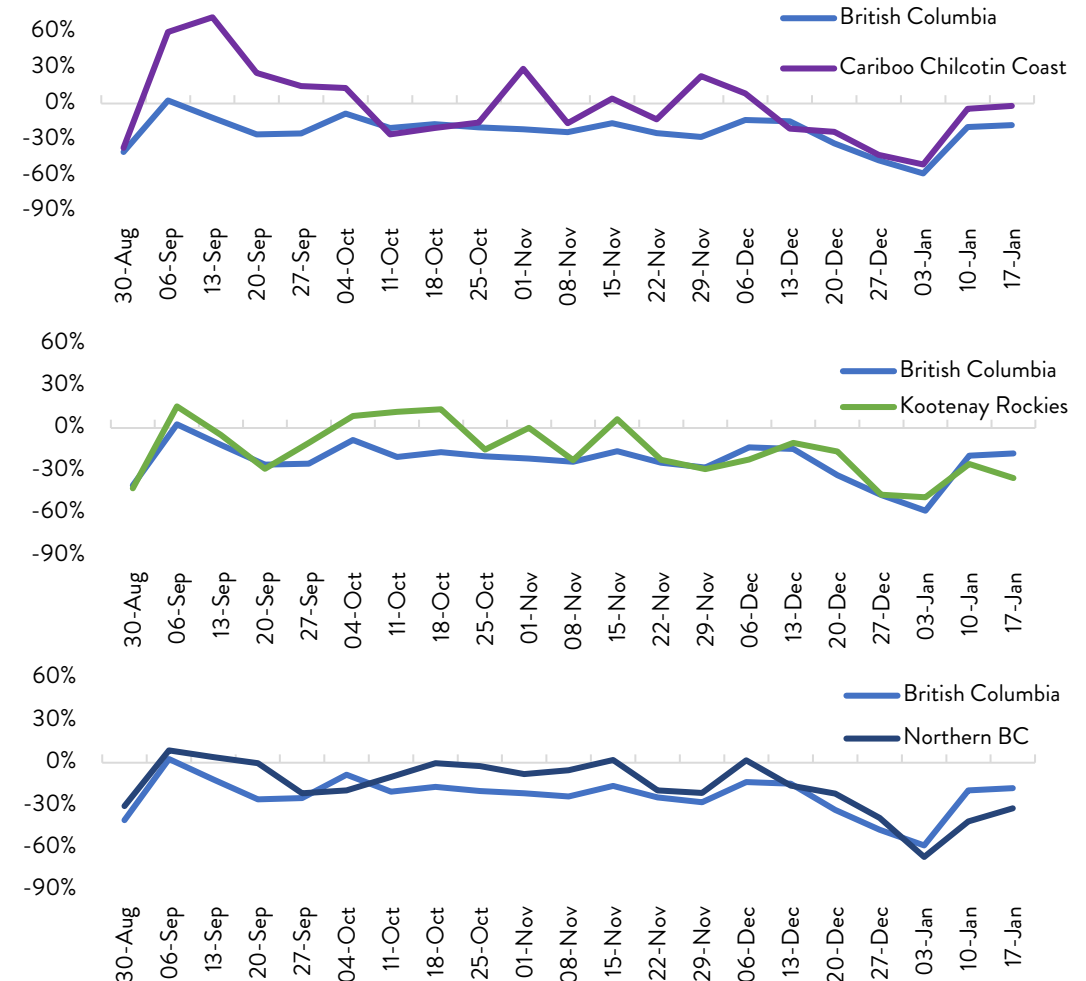
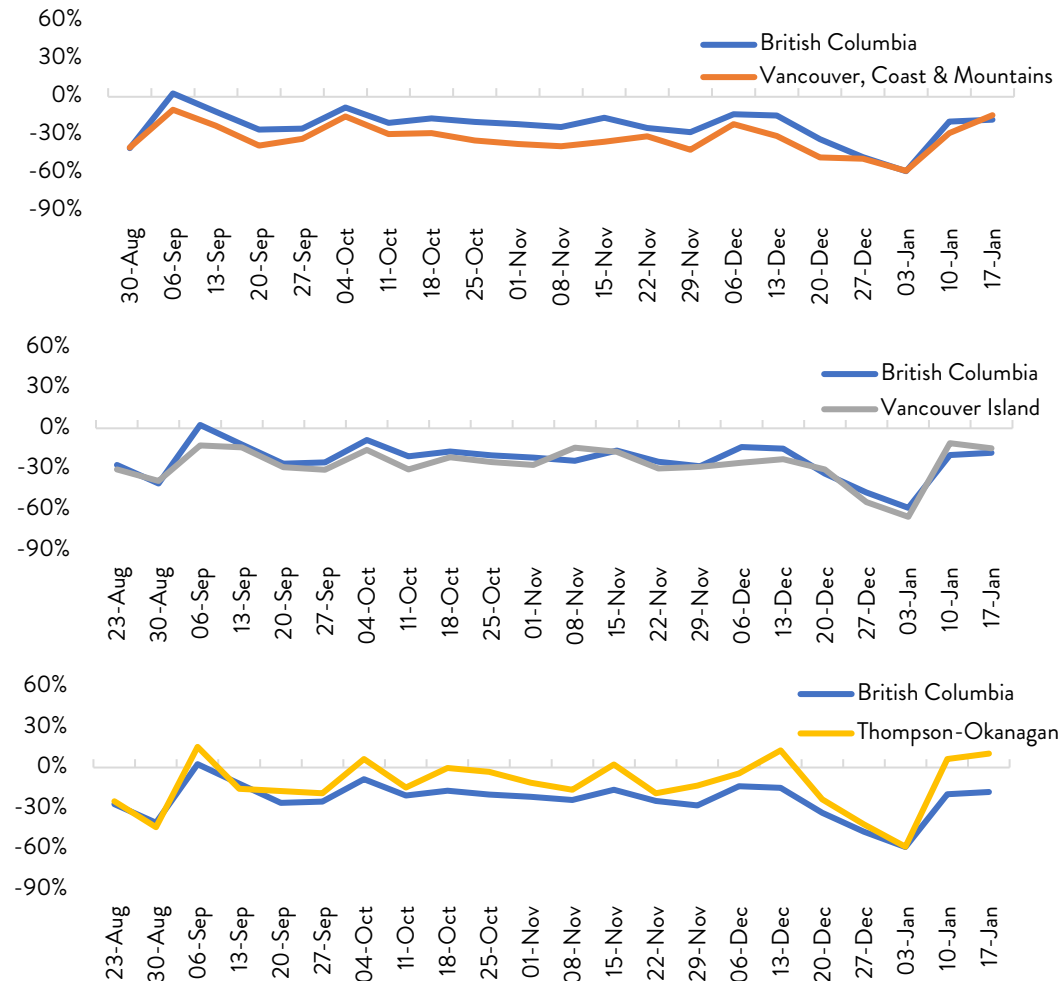
Weekly movement in BC is down -18.0% compared to same period in 2020

- Environics Analytics also reports year-over-year analysis in the Weekly COVID Tracker Report.
- For the week ending January 17, 2021, weekly domestic overnight visitation was down (-18.0%) compared to the same week in 2020.
- A year-over-year decrease in weekly visitation was seen for nearly all tourism regions:
 - Kootenay Rockies (-35.4%)
 - Northern BC (-32.3%)
 - Vancouver, Coast & Mountains (-32.3%)
 - Vancouver Island (-14.7%)
 - Cariboo Chilcotin Coast (-1.9%)
- However, a year-over-year increase in weekly domestic overnight visitation was seen for the Thompson Okanagan (+10.3%).



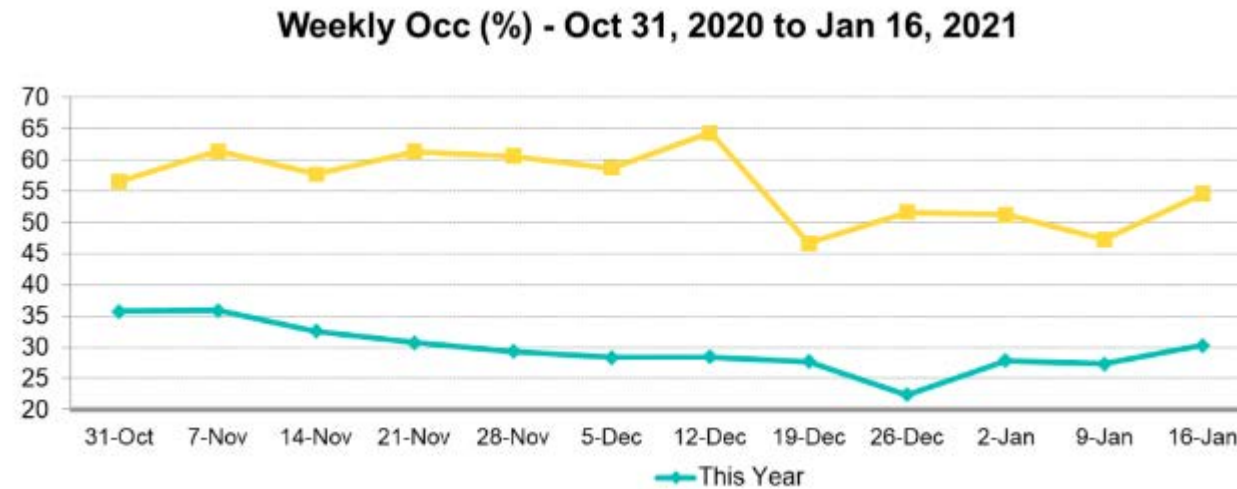
Source: [Environics Analytics Weekly COVID Tracker Report, January 17, 2021](#)

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



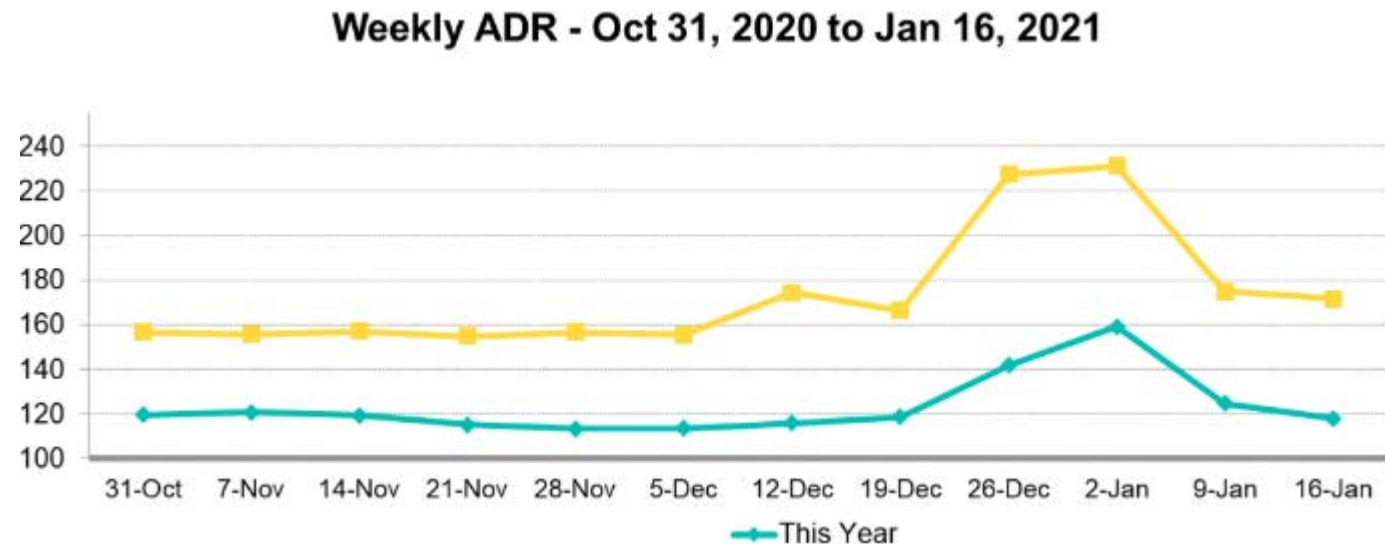
BC's weekly occupancy rate (30.3%) up +2.9 points from previous week

- STR, an agency which captures BC hotel performance, shows the average weekly occupancy for BC was 30.3% for the week of January 10 – 16, 2021. This represents an increase of +2.9 points from the previous week and a decrease of -24.3 points compared to a similar period in 2020.



BC's average daily rate (\$117.92) down -5.4% from the previous week

- STR, an agency which captures BC hotel performance, shows BC's average daily rate (ADR) was \$117.92 for the week of January 10 – 16, 2021. This represents a decrease of -5.4% from the previous week and a decrease of -31.2% compared to a similar period in 2020.



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

| | Jan. 10 - 16, 2021 | Week-over-Week Jan. 10 - 16, 2021 vs. Jan. 3 - 9, 2021 | Year-over-Year Jan. 10 - 16, 2021 vs. Jan. 12 - 18, 2020 | Jan. 10 - 16, 2021 | Week-over-Week Jan. 10 - 16, 2021 vs. Jan. 3 - 9, 2021 | Year-over Year Jan. 10 - 16, 2021 vs. Jan. 12 - 18, 2020 |
|-------------------------|--------------------|--|--|--------------------|--|--|
| | Occupancy Rate | Occupancy Point Change | Occupancy Point Change | ADR | ADR Percent Change | ADR Percent Change |
| British Columbia | 30.3% | +2.9 | -24.3 | \$117.92 | -5.4% | -31.2% |
| Vancouver (City of) | 17.2% | +1.6 | -43.1 | \$131.50 | +0.3% | -30.2% |
| Whistler | 21.8% | -8.4 | -58.5 | \$276.43 | -12.8% | -42.3% |
| Victoria | 38.8% | +11.3 | -8.5 | \$102.33 | -5.5% | -21.0% |
| Kelowna | 22.3% | +1.0 | -18.7 | \$98.41 | +1.0% | -21.0% |
| Kamloops | 28.9% | +3.3 | -10.0 | \$90.30 | +2.5% | -7.0% |
| Richmond | 46.3% | +5.7 | -30.5 | \$123.33 | -0.8% | -23.2% |



Over half of Americans plan on visiting friends and relatives for their first trip

- A recent survey of US adults by Longwoods International showed that the first trip the majority of US travellers (51%) will take (all travel methods) is to visit friends and relatives.
- 41% do not plan to travel until there is a vaccine, while 41% support opening up their community to visitors. 47% feel safe dining in local restaurants and shopping in their community's retail stores.

First Trip Travelers Will Take in 2021



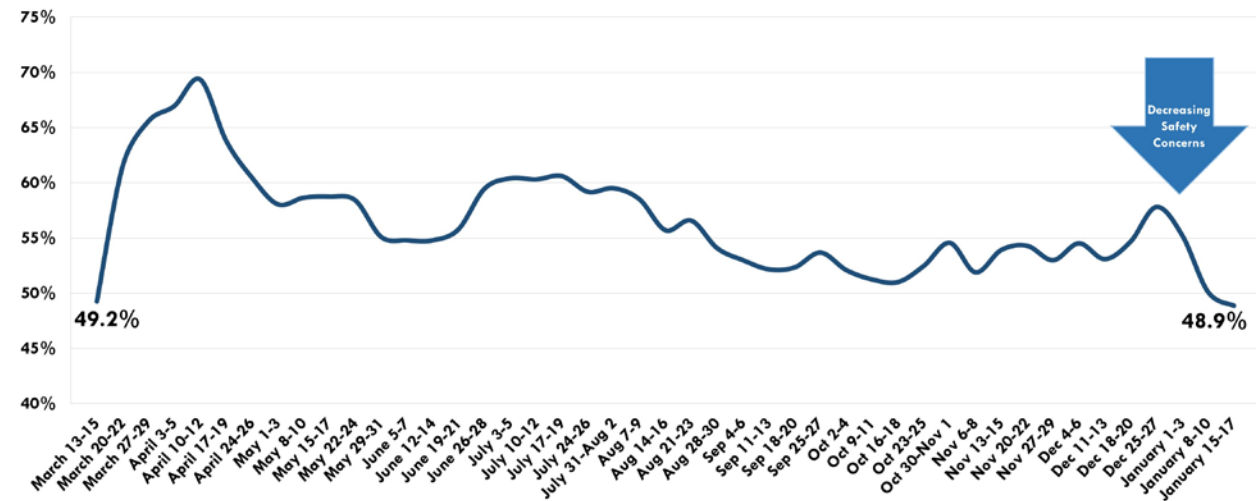
Source: [Longwoods International, January 12, 2021](#)

Over half of American travellers perceive tourism activities as safe

- Destination Analysts, a US-based tourism research company, found that over 50% of American travellers perceive travel and leisure activities as safe (while 48.9% perceive it as unsafe).
- 36.8% of Americans who usually attend/enjoy attending live events and festivals say they would be comfortable travelling to attend such an event by June.

PERCEPTION OF TRAVEL & LEISURE ACTIVITIES AS UNSAFE MARCH 15, 2020 – JANUARY 17, 2021

% of American Travelers Rating as "Somewhat Unsafe" or "Very unsafe"—Average Score for All Activities Tested



QUESTION: AT THIS MOMENT, HOW SAFE WOULD YOU FEEL DOING EACH TYPE OF TRAVEL ACTIVITY?

(Base: Waves 1-45. 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, 1,205, 1,204, 1,206, 1,201, 1,207, 1,206, 1,225 and 1,205 completed surveys.)

Destination Analysts
DO YOUR RESEARCH

Source: [Destination Analysts, January 21, 2020](#)



New ski dashboard by US Travel Association shows US ski mountain visitation

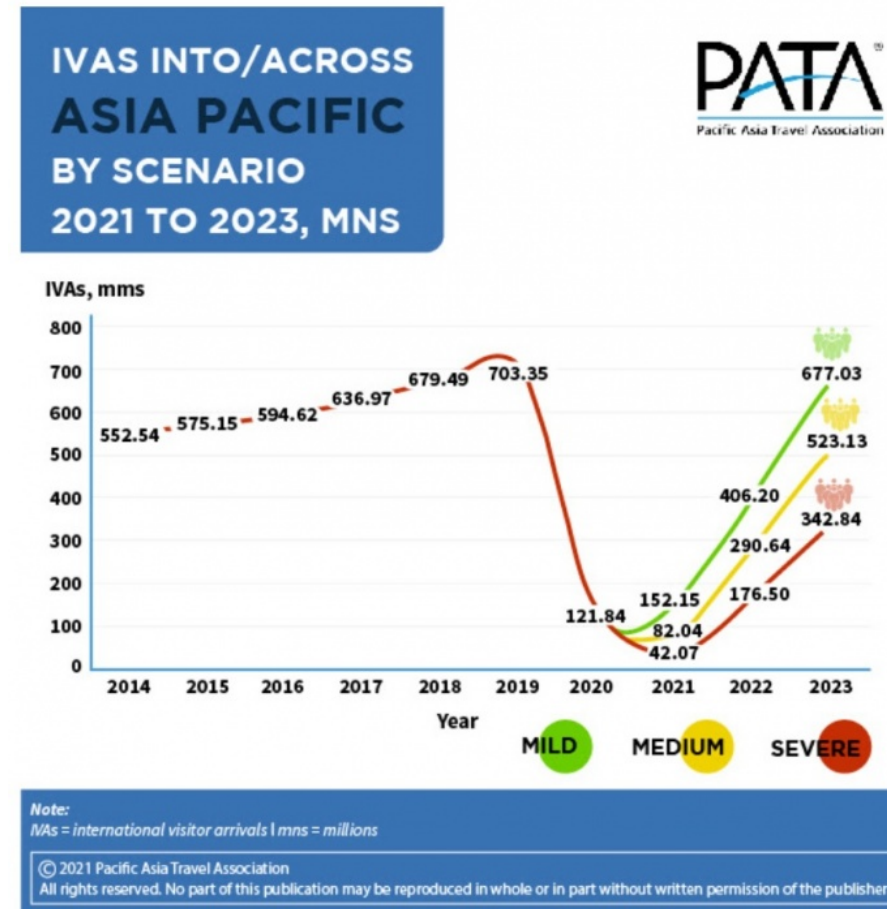
- A ski dashboard by the US Travel Association gives information on the number of visitors to US ski destinations.
- Over 50% of skiers identified travelled over 200 miles to reach their destination.
- Over 76% of the skiers were identified as tourists (as opposed to locals).
- The full dashboard, including data by ski mountain, DMAs of origin, and demographic data can be found [here](#).



Source: [Visitation Trends: US Ski Destinations, US Travel Association, January 16, 2021](#)

PATA estimates Asia Pacific's best-case recovery of international visitor arrivals by 2023

- The Pacific Asia Travel Association has released three scenarios for tourism into/across the Asia Pacific for 2021-2023. The best-case “mild” scenario shows a near-full recovery within three years to 677 million international visitor arrivals, with the “severe” scenario only reaching 342 million, half of the 2019 level.
- The report, which looked at four destinations in the Americas, showed that international visitor arrivals into those destinations are not expected to see an annual increase until 2022.



Source: [Breaking Travel News, January 21, 2020](#)

WTTC predicts 84 to 111 million tourism jobs to return in 2021

- The World Travel & Tourism Council announced that up to 111 million global travel and trade jobs could be recovered in 2021. They predict that at least 84 million jobs will return this year.
- The best-case scenario of 111 million jobs would include travel recovery starting from late March. They report that “widespread vaccination programs and a swift adoption of comprehensive test-and-trace regimes, together with continual, strong international coordination from the private and public sectors” are required for travel recovery.



Source: [World Travel & Tourism Council, January 19, 2021](#)

Euromonitor releases their top 10 consumer trends for 2021

- Euromonitor's key takeaways from their top 10 consumer trends for 2021 include:
 - Companies should help reshape the world in a more sustainable way, leading a shift from a volume- to a value-driven economy and turning the tide on social inequity and environmental damage.
 - Companies must preserve the swift and seamless shopping journey across all channels.
 - Companies should pivot their product development strategy to encompass the tranquility of rural living in urban environments to better satisfy city-scapers.
 - Delivering virtually enabled at-home experiences remains imperative to drive e-commerce sales and gather data.
 - Businesses should provide solutions that address the consumer desire to maximize time.
 - Companies should implement enhanced safety measures and innovations that target concerns to reassure consumers.
 - Businesses must provide products and services that support resiliency for mental wellbeing and to help Shaken and Stirred consumers weather adverse circumstances to gain trust.
 - Understanding the benefits and challenges of working remotely allows companies to bring the best of the office into the home.



Source: [Top 10 Global Consumer Trends 2021, Euromonitor, January 2021](#)

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.
- 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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