

# COVID-19 Research Roundup

February 22, 2021

Stone Mountain Provincial Park, Northern BC

## *BC's Restart Plan*

The phased approach to [BC's Restart Plan](#) is on pause for the duration of province-wide restrictions, as noted below.

### **Province-wide restrictions**

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, January 7, 2021, and February 5.

On February 19, 2021, Canadian and US officials agreed to extend the closure of the border between the two countries to non-essential travel until at least March 21, 2021.

Information provided in this Research Roundup Report highlights not only local insights, but global insights which may be applicable to BC now.







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:

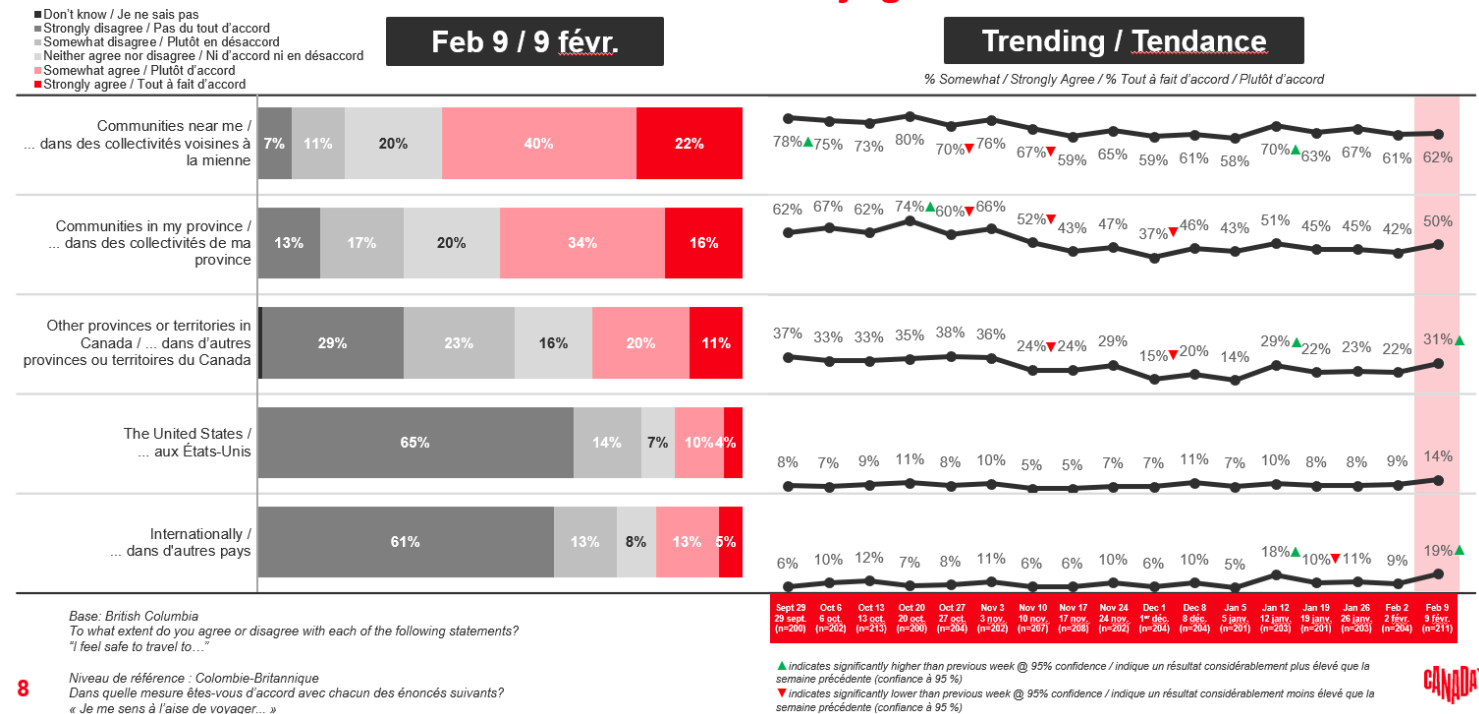
- 62% of BC residents feel safe to travel to nearby communities
- 77% of BC residents would be comfortable to visit a beach and/or lake
- BC sees first week-over-week increase (+10%) in weekly domestic overnight visitation since end of 2020
- BC sees a decrease of -39.6% in weekly domestic overnight visitation compared to same period last year
- BC's occupancy rate up +3.9 points from the previous week
- BC's average daily rate (\$126.33) up +8.4% from the previous week
- BC's revenue per available room (RevPAR) (\$42.85) up +22.4% from the previous week
- 59% of Canadians are likely to dine out once vaccinated
- Canada travel trends for 2021 include a focus on travel impact, slow travel, and wellness
- North America scores high for Skift's global recovery index
- American travellers' perception of tourism as unsafe is at a pandemic low
- The US Bureau of Transportation Statistics reports US airline passenger numbers fell to 1985 levels in 2020
- Cirium reports European airlines facing a recent decline in international travel
- Tourism and COVID-19 dashboard and reporting resources

# 62% of BC residents feel safe to travel to nearby communities

- In Destination Canada's Wave 33 (February 9, 2021) report, 62% of British Columbians stated they feel safe to travel to nearby communities, whereas 18% of BC residents expressed an opposing view, stating they did not feel safe, resulting in a net score of +44.
- 50% of British Columbians stated they feel safe to travel to other communities in the rest of the province, whereas 30% of BC residents stated they did not feel safe, resulting in a net score of +20.
- A -21 net score was reported by BC residents who feel safe to travel to provinces or territories in Canada, a -65 net score to the US, and a -55 net score to other countries.

## British Columbia / Colombie-Britannique

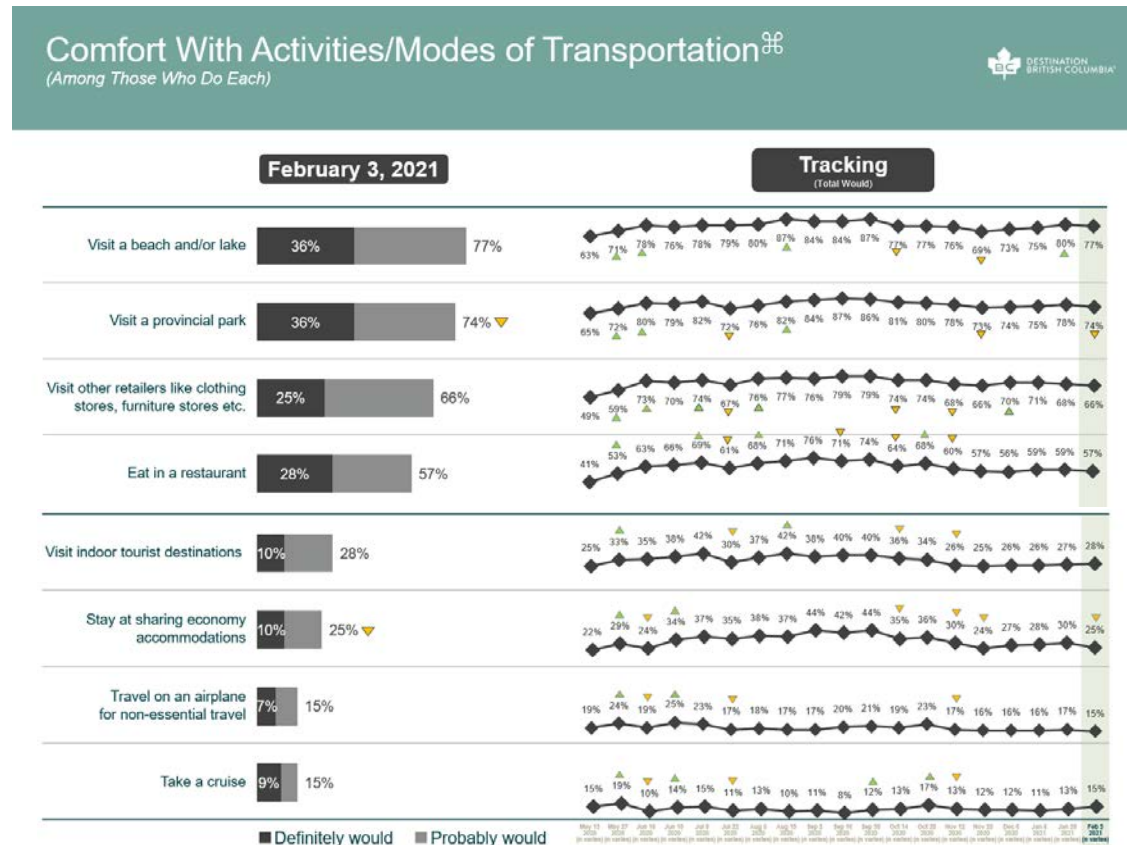
*I feel safe to travel / Je me sens à l'aise de voyager*



Source: [Destination Canada's Weekly Resident Sentiment, Wave 33, Leger, February 9, 2021](#)

# 77% of BC residents would be comfortable to visit a beach and/or lake

- In Destination BC's BC Residents' Public Perceptions latest survey (Wave 19 - February 3, 2021), 77% of BC residents said they would be comfortable to visit a beach and/or lake in the next few weeks. 74% would be comfortable to visit a provincial park, 66% would visit other retailers like clothing stores, 66% would visit other retailers like clothing stores, 66% would visit other retailers like clothing stores, and 57% would eat in a restaurant.
- 15% of BC residents said they would be comfortable to travel on an airplane for non-essential travel or take a cruise in the next few weeks.



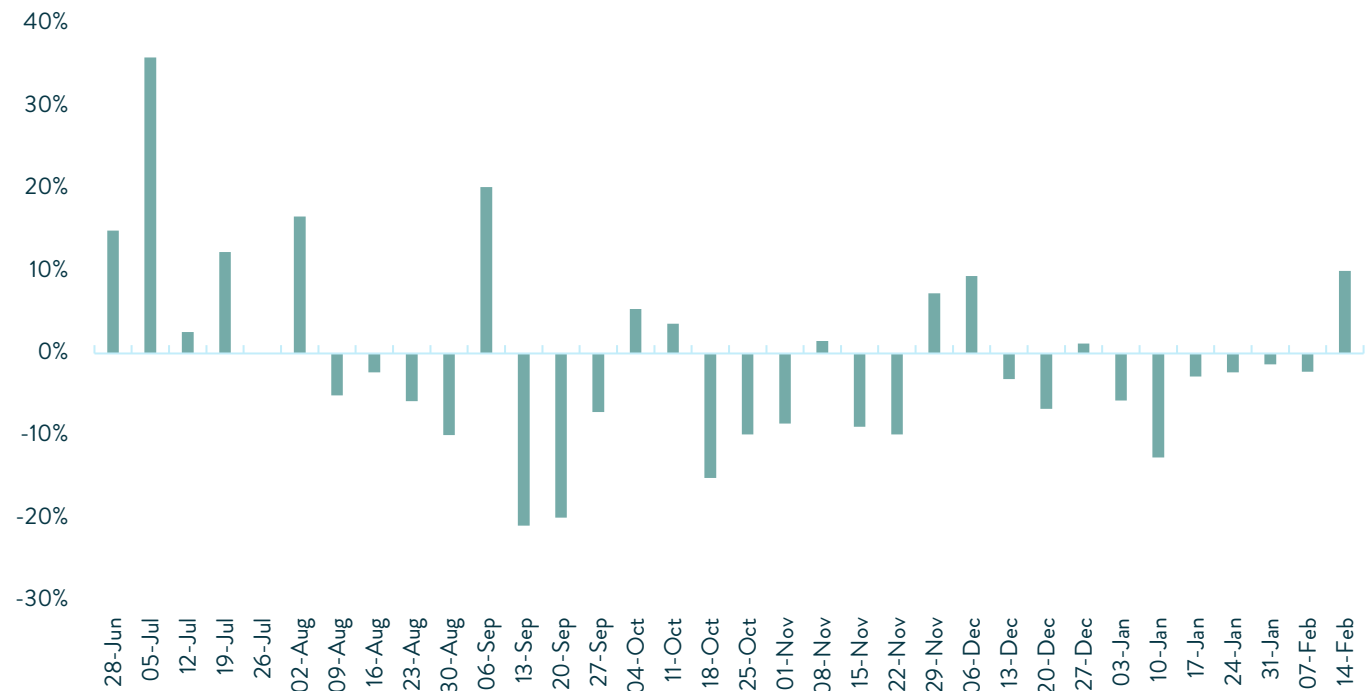
Source: [Destination BC's BC Residents' Public Perceptions: COVID-19 Travel and Tourism Wave 19, Insights West, February 3, 2021](#)



## *BC sees first week-over-week increase (+10%) in weekly domestic overnight visitation since end of 2020*

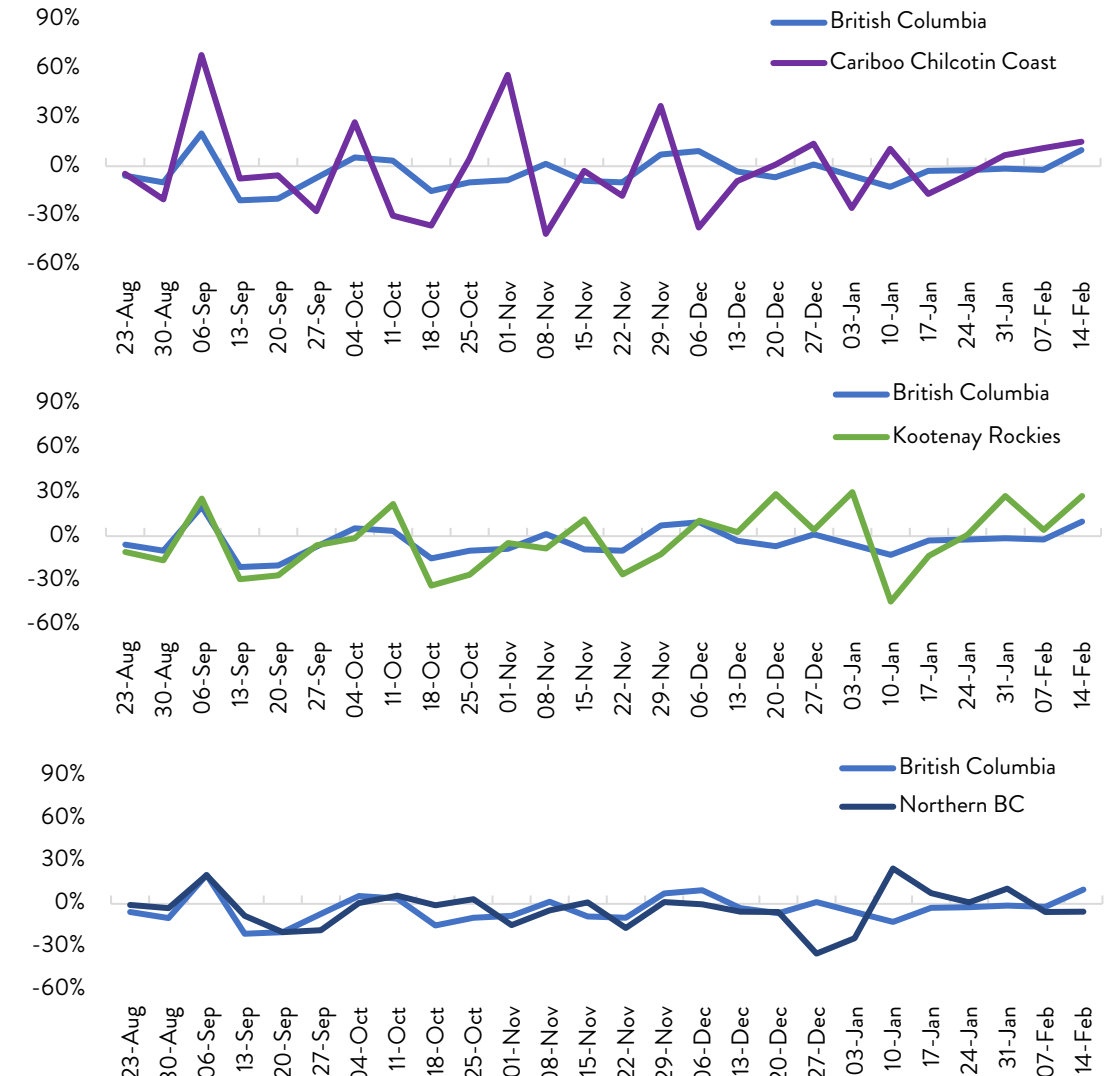
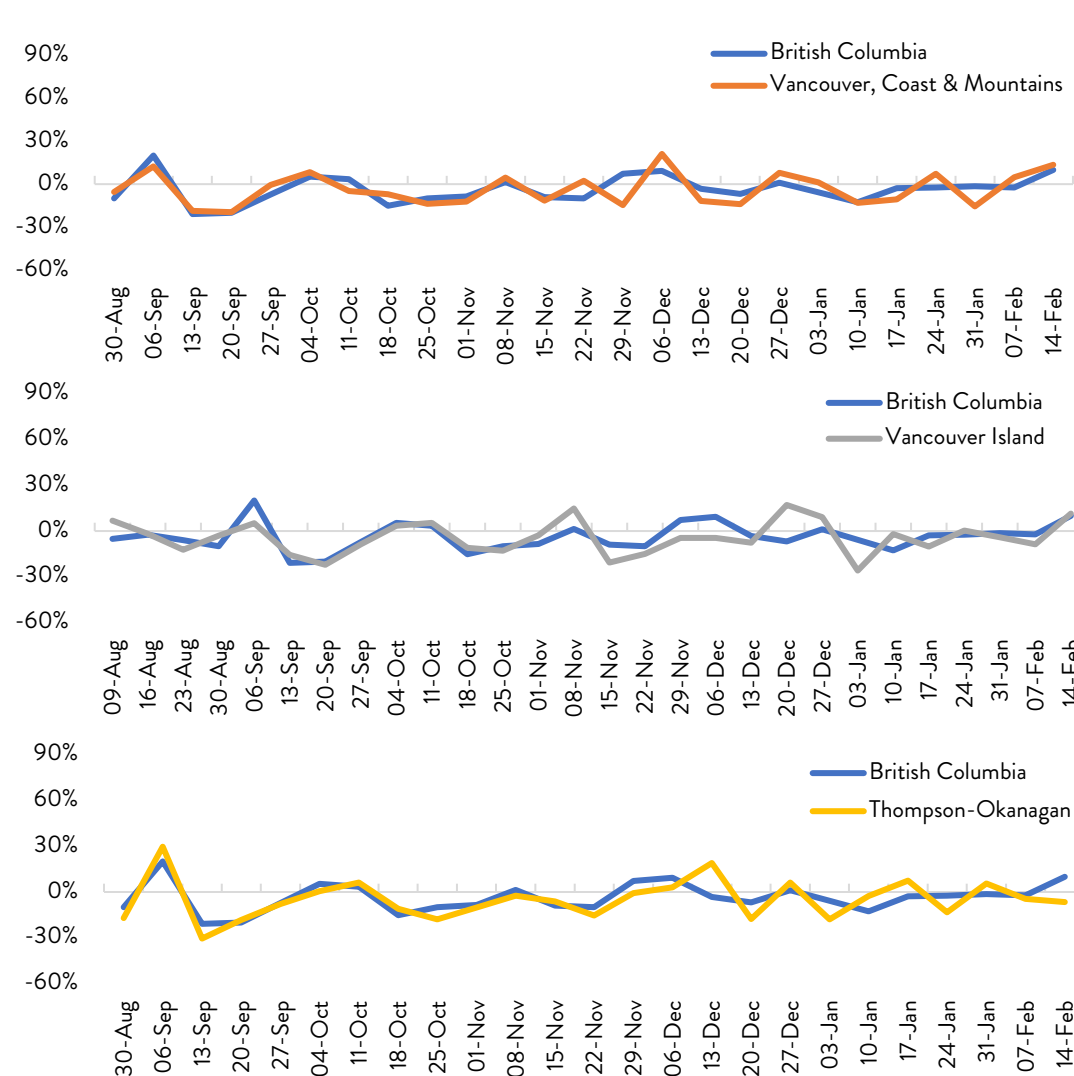
- According to Environics Analytics Weekly COVID Tracker Report, during the week ending February 14, 2021, BC experienced a week-over-week increase (+10%) in weekly domestic overnight visitation. This was the first week-over-week increase seen since the end of 2020 and likely due in part to the week including the Saturday and Sunday prior to the Family Day Stat holiday on Monday.
- Week-over-week increases in domestic overnight visitation were seen in most tourism regions:
  - Kootenay Rockies (+27.4%)
  - Cariboo Chilcotin Coast (+15.1%)
  - Vancouver, Coast & Mountains (+13.7%)
  - Vancouver Island (+11.5%)
- However, week-over-week decreases in domestic overnight visitation were seen in the remaining regions:
  - Thompson Okanagan (-6.5%)
  - Northern BC (-5.5%)

BC's Domestic Overnight Visitation  
Week-over-Week Percent Change



Source: [Environics Analytics Weekly COVID Tracker Report, February 14, 2021](#)

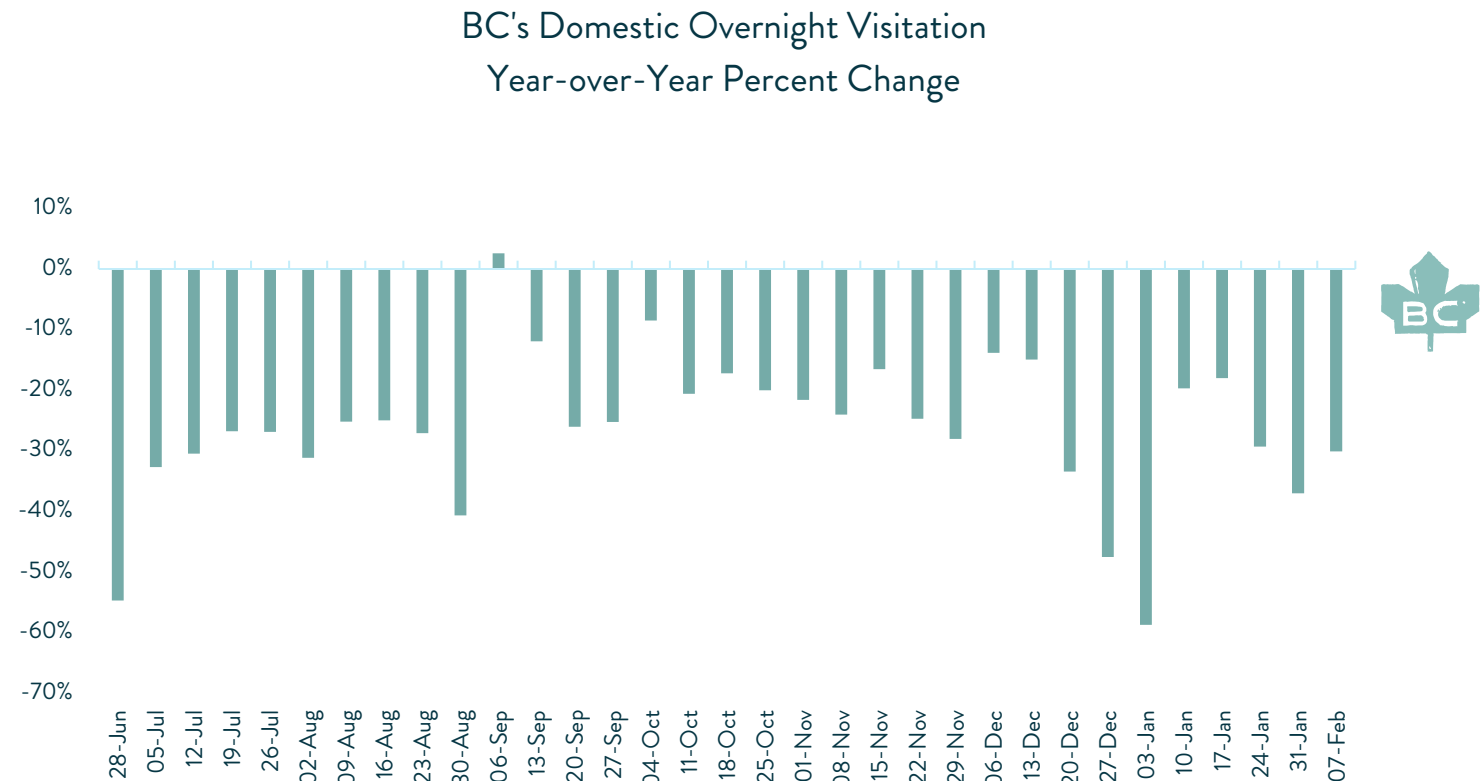
# BC and Regional Domestic Overnight Visitation Week-over-Week Percent Change



Source: [Environics Analytics Weekly COVID Tracker Report, February 14, 2021](#)

## *BC sees a decrease of -39.6% in weekly domestic overnight visitation compared to same period last year*

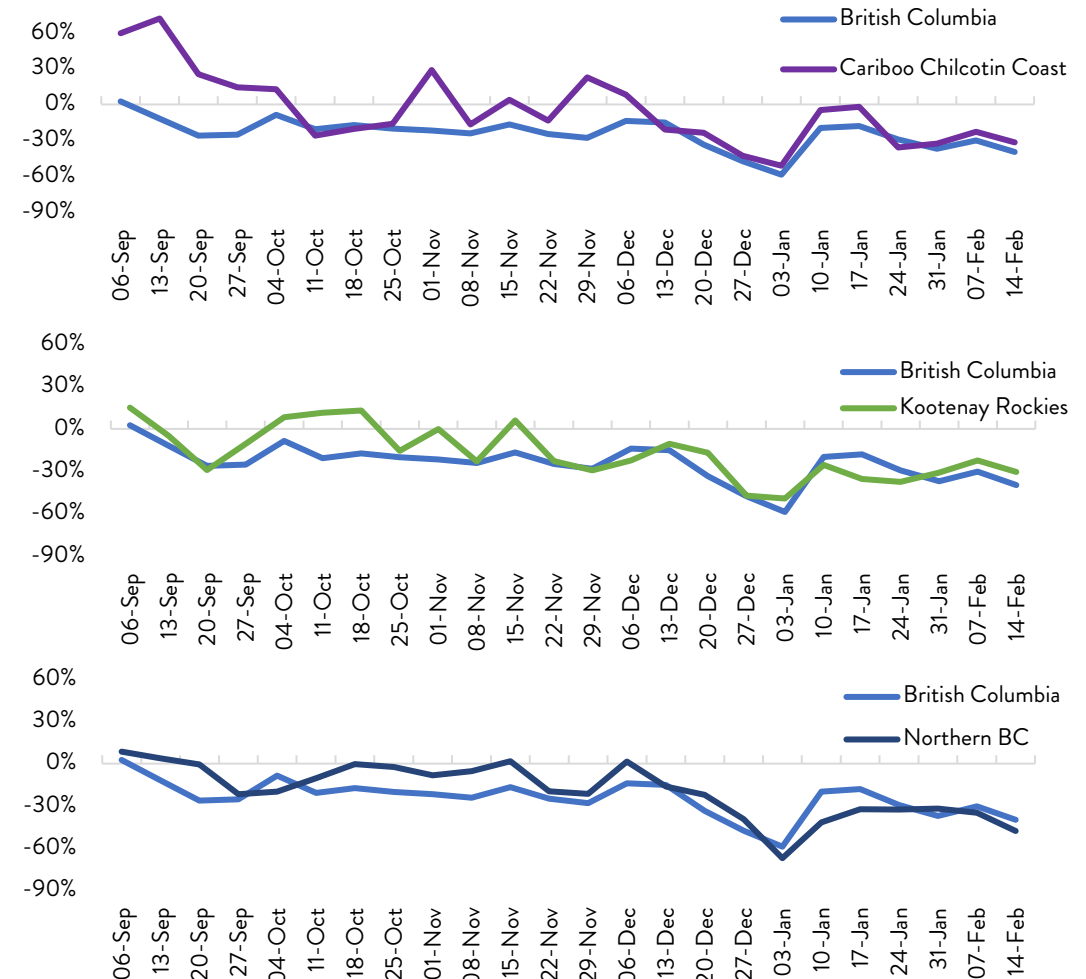
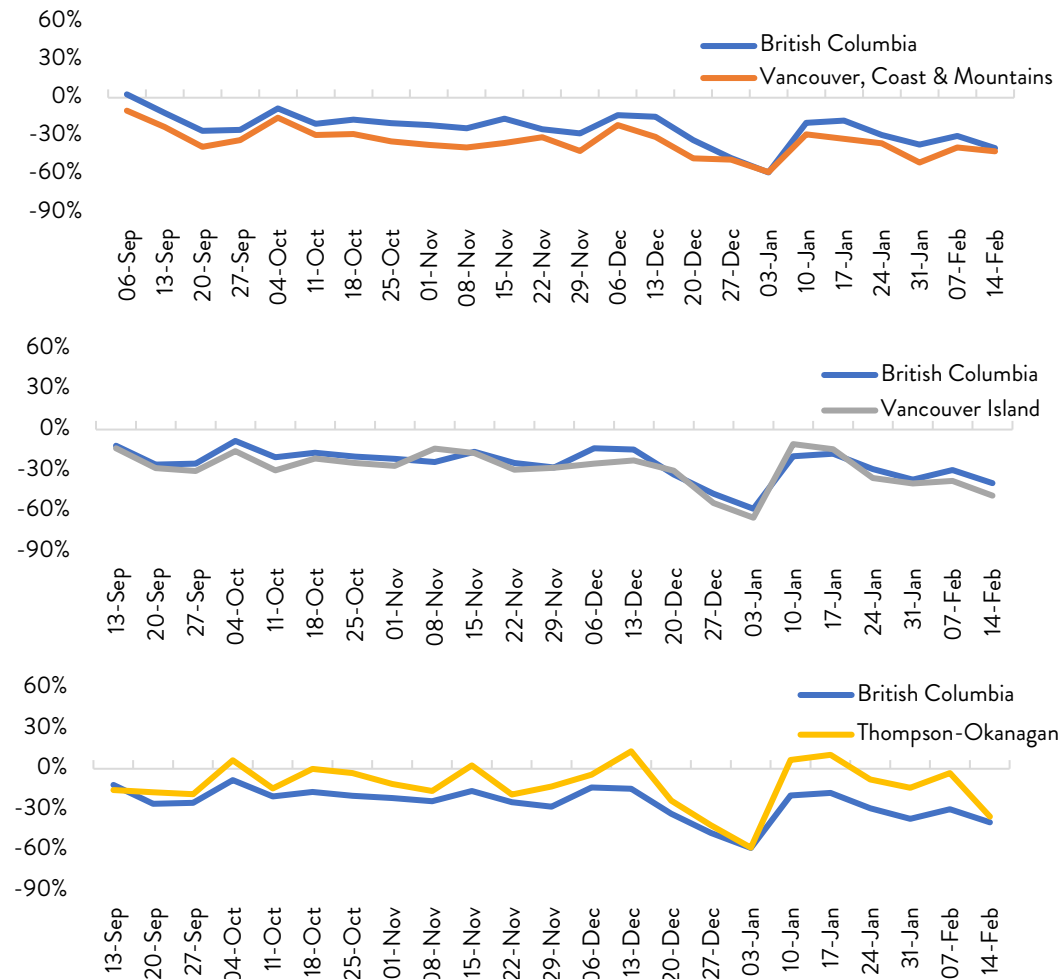
- Environics Analytics also reports year-over-year analysis in the Weekly COVID Tracker Report.
- For the week ending February 14, 2021, weekly domestic overnight visitation was down (-39.6%) compared to the same week in 2020.
- A year-over-year decrease in weekly visitation was seen across the province in all tourism regions:
  - Vancouver Island (-48.8%)
  - Northern BC (-47.6%)
  - Vancouver, Coast & Mountains (-42.3%)
  - Thompson Okanagan (-35.5%)
  - Cariboo Chilcotin Coast (-31.7%)
  - Kootenay Rockies (-30.3%)



Source: [Environics Analytics Weekly COVID Tracker Report, February 14, 2021](#)



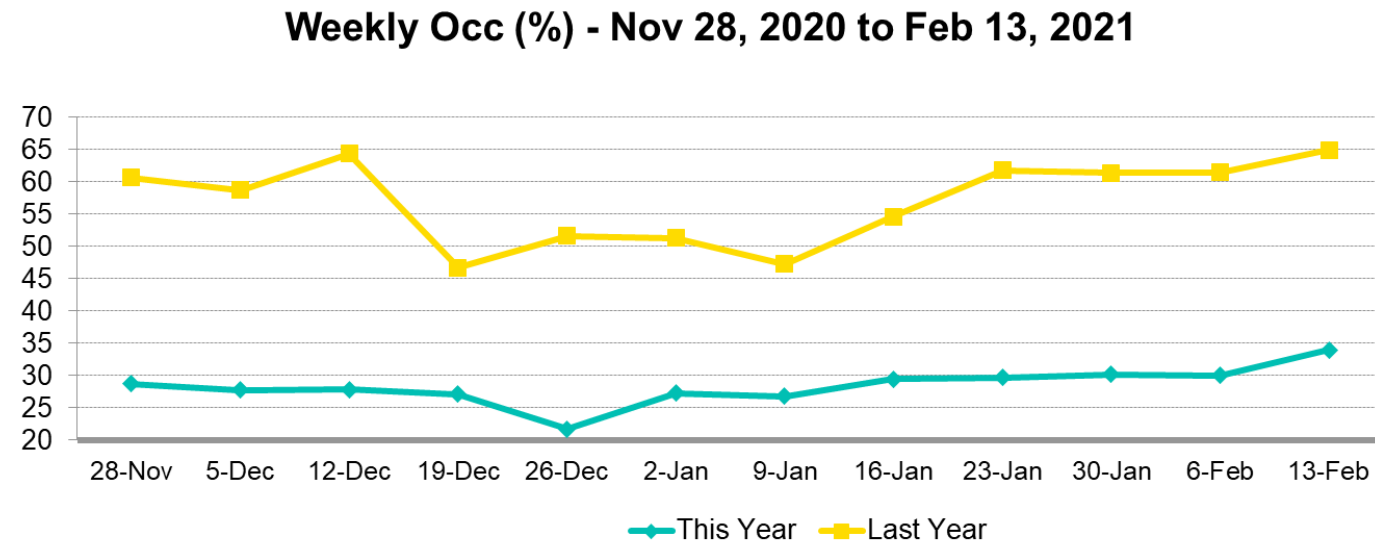
# BC and Regional Domestic Overnight Visitation Year-over-Year Percent Change



Source: [Environics Analytics Weekly COVID Tracker Report, February 14, 2021](#)

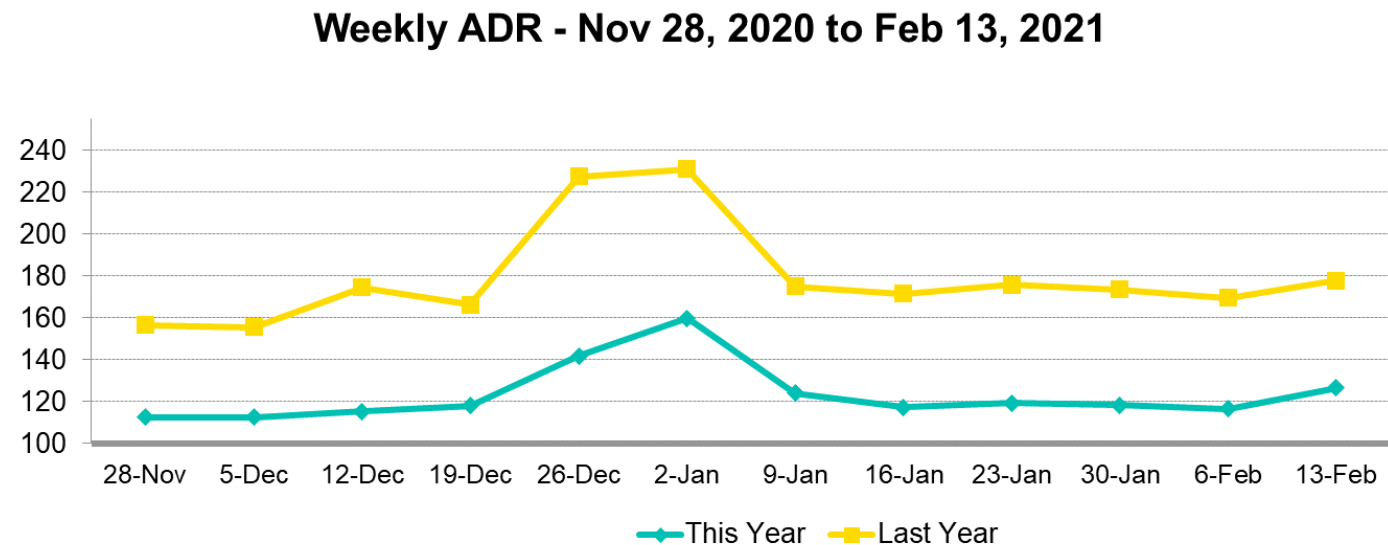
## *BC's occupancy rate up +3.9 points from the previous week*

- STR, an agency which reports BC's hotel performance, shows the average weekly occupancy for BC was 33.9% for the week of February 7 – February 13, 2021. This represents an increase of +3.9 points from the previous week and a decrease of -31.0 points compared to a similar period in 2020.



## *BC's average daily rate (\$126.33) up +8.4% from the previous week*

- STR, an agency which reports BC's hotel performance, shows BC's average daily rate (ADR) was \$126.33 for the week of February 7 – February 13, 2021. This represents an increase of +8.4% from the previous week and a decrease of -28.9% compared to a similar period in 2020.



## British Columbia's Hotel Occupancy Rate and Average Daily Room Rate (ADR)

	Feb. 7 - 13, 2021 Occupancy Rate	Week-over-Week Feb. 7 - 13, 2021 vs. Jan. 31 - Feb. 6, 2021 Occupancy Point Change	Year-over-Year Feb. 7 - 13, 2021 vs. Feb. 9 - 15, 2020 Occupancy Point Change	Feb. 7 - 13, 2021 ADR	Week-over-Week Feb. 7 - 13, 2021 vs. Jan. 31 - Feb. 6, 2021 ADR Percent Change	Year-over Year Feb. 7 - 13, 2021 vs. Feb. 9 - 15, 2020 ADR Percent Change
<b>British Columbia</b>	<b>33.9%</b>	<b>3.9</b>	<b>-31.0</b>	<b>\$126.33</b>	<b>8.4%</b>	<b>-28.9%</b>
Vancouver (City of)	23.2%	5.6	-54.7	\$155.15	10.7%	-21.8%
Whistler	22.9%	4.4	-55.9	\$328.79	38.5%	-38.6%
Victoria	33.5%	-5.1	-32.2	\$120.01	10.1%	-17.9%
Kelowna	28.0%	5.3	-21.3	\$107.23	6.8%	-15.0%
Kamloops	33.1%	3.4	-17.8	\$90.67	-0.3%	-10.5%
Richmond	39.0%	4.5	-34.7	\$117.30	0.4%	-27.2%





## *BC's revenue per available room (RevPAR) (\$42.85) up +22.4% from the previous week*

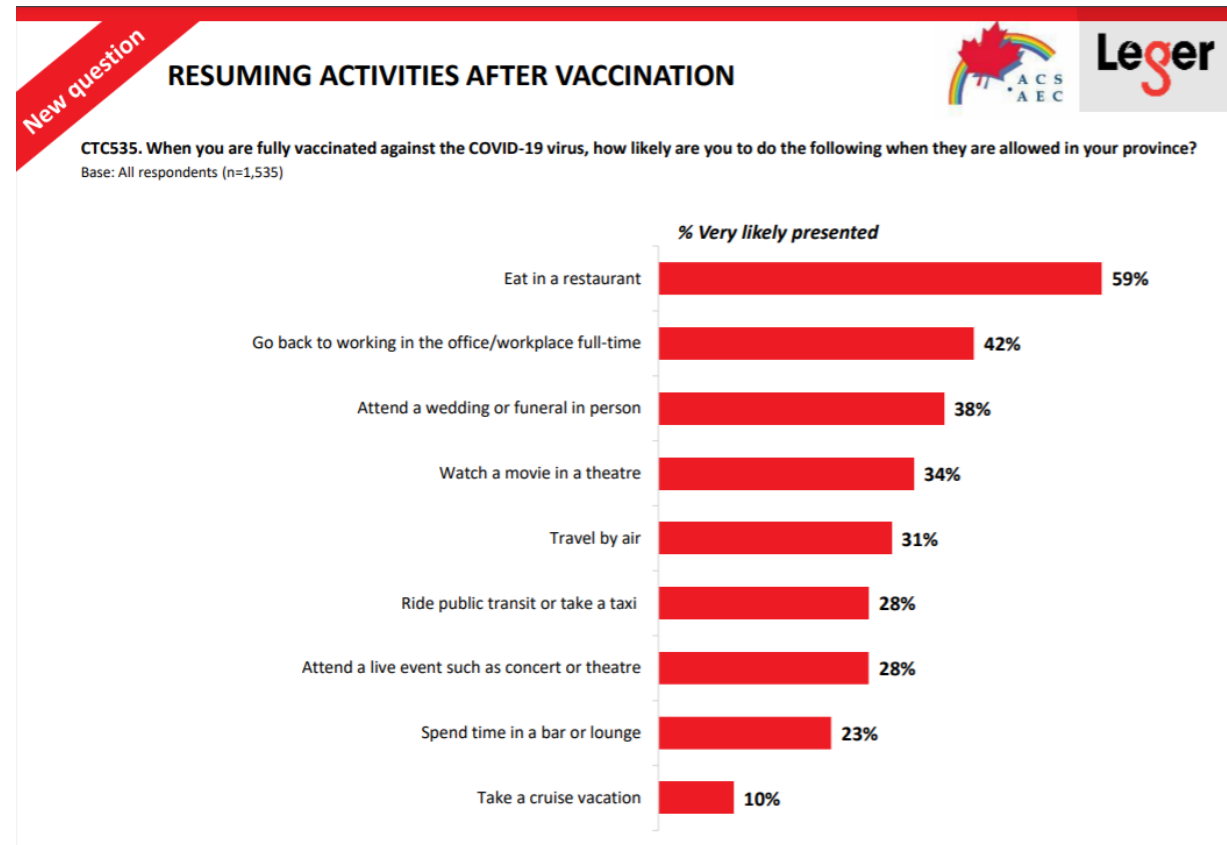
- STR, an agency which reports BC's hotel performance, shows BC's revenue per available room (revPAR) was \$42.85 for the week of February 7 – February 13, 2021. This represents an increase of +22.4% from the previous week and a decrease of -62.8% compared to a similar period in 2020.

	Feb. 7 - 13, 2021 RevPAR	Week-over-Week Feb. 7 - 13, 2021 vs. Jan. 31 - Feb. 6, 2021 RevPAR Percent Change	Year-over-Year Feb. 7 - 13, 2021 vs. Feb. 9 - 15, 2020 RevPAR Percent Change
British Columbia	\$42.85	22.4%	-62.8%
Vancouver (City of)	\$36.03	46.4%	-76.7%
Whistler	\$75.13	71.2%	-82.2%
Victoria	\$40.21	-4.3%	-58.1%
Kelowna	\$30.03	31.6%	-51.7%
Kamloops	\$29.97	11.0%	-41.9%
Richmond	\$45.73	13.4%	-61.5%



## 59% of Canadians are likely to dine out once vaccinated

- A recent survey by Leger showed that 59% of Canadians would eat in a restaurant when they are fully vaccinated against COVID-19.
- 38% would attend a wedding or funeral, 31% would travel by air, 28% would attend a live event, and 10% would take a cruise vacation.



Source: [Leger, February 15, 2021](#)

# *Canada travel trends for 2021 include a focus on travel impact, slow travel, and wellness*

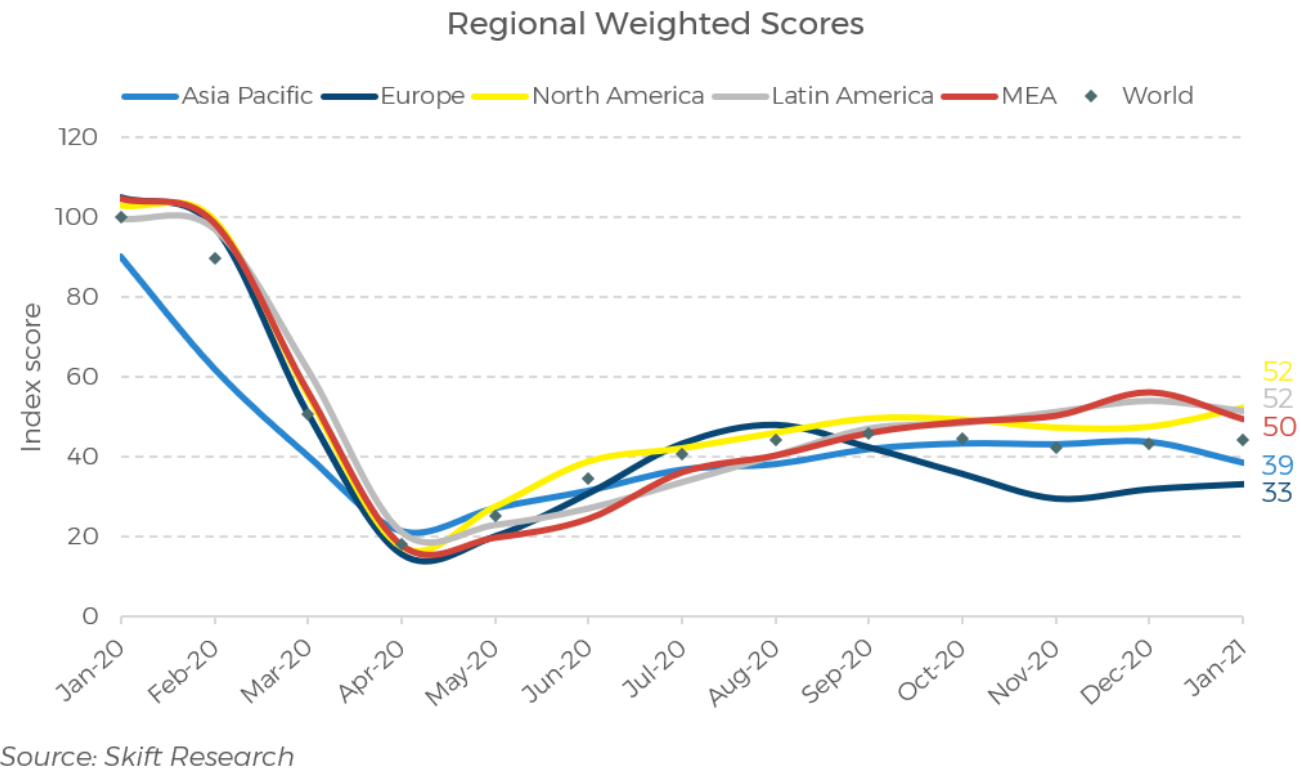
- The Tourism Industry Association of Canada has released a report in partnership with tourism consultant, Twenty31, that highlights 21 tourism trends for 2021. Some of these include:
  - Travel with intention and impact
  - Hygiene over fees
  - The slow travel movement
  - Wellness tourism
  - Travel is a luxury
  - Destination Asia
- Each of the 21 trends highlighted in the report include key takeaways for destinations, operators and travellers.



Source: [State of Tourism in Canada during COVID-19, TIAC, February 2021](#)

## North America scores high for Skift's global recovery index

- Skift's recovery index for January 2021 showed North America at a weighted recovery score of 52 (with 100 being the global score at the beginning of 2020). Along with Latin America, this is the highest regional recovery score globally, with the lowest being 33 for Europe.
- Skift shared their thoughts that globally, a lack of a unified solution is holding recovery back, as is a lack of leadership and disparate approaches to recovery.



Source: [Skift Recovery Index, Skift, February 2021](#)



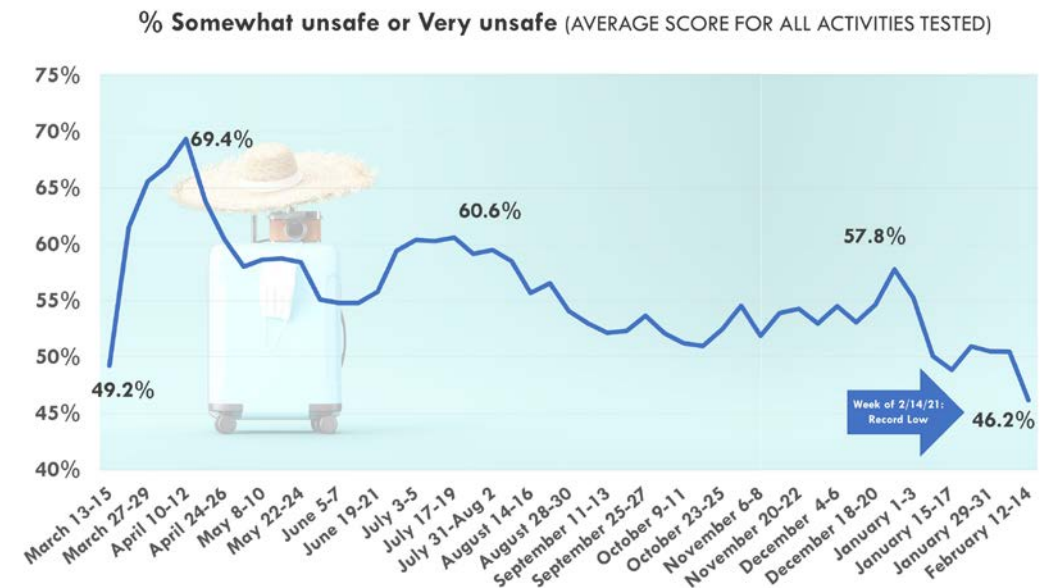


# American travellers' perception of tourism as unsafe is at a pandemic low

- Destination Analysts, a US-based tourism research company, found in a survey for February 12-14 that 46.2% of American travellers perceived travel and leisure activities as unsafe. This is the lowest this has been since the start of the pandemic.
- Around 60% of American travellers feel at least somewhat confident they can travel safely in the current environment.
- 58.5% are in a travel readiness state of mind.

## PERCEPTIONS OF TRAVEL & LEISURE ACTIVITIES AS UNSAFE

MARCH 13, 2020 – FEBRUARY 14, 2021



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

(Base: Waves 1-49. 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, 1,205, 1,206, 1,209, 1,209 and 1,216 completed surveys.)

Destination Analysts  
DO YOUR RESEARCH

Source: [Destination Analysts, February 14, 2021](#)



# *The US Bureau of Transportation Statistics reports US airline passenger numbers fell to 1985 levels in 2020*

- Recent data by the United States Bureau of Transportation Statistics showed that 2020 passenger numbers have fallen to 1985 levels.
- According to Aerotime Hub, “... airlines carried 62% fewer scheduled service passengers in December 2020 than in December 2019. Overall, due to the coronavirus crisis, the US airlines carried just 368 million flyers in 2020 compared to nearly 923 million in 2019.”
- US domestic air passenger volume was down -58.7% in 2020 compared to 2019, whereas international air passenger volume was down -70.4%.



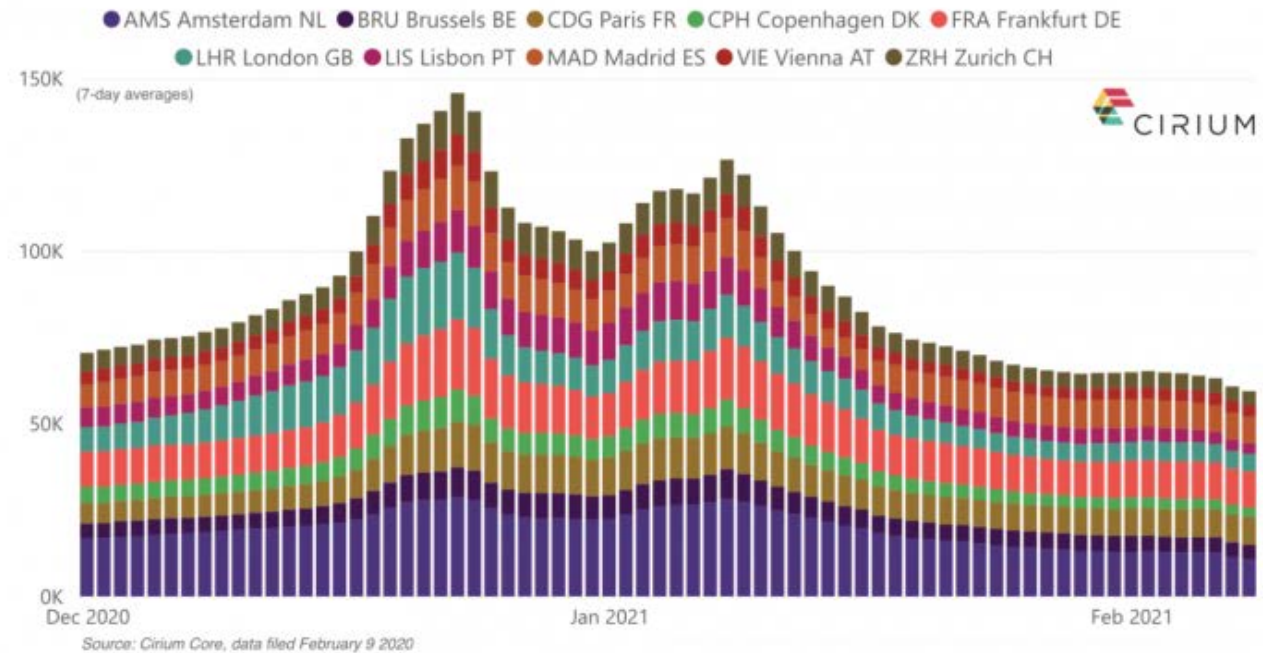
Source: [Aerotime Hub, February 12, 2021](#)



# *Cirium reports European airlines facing a recent decline in international travel*

- Aviation and travel data and analytics company Cirium has recorded a new low in seat capacity on European flights after surges were seen in December 2020 and early January 2021.
- It is reported that the decline comes as travellers grapple with the increasingly complex array of restrictions designed to contain the spread of more transmissible strains of COVID-19.

## Tracked intra-European international passenger jet seats flown by arrival airport



Source: [Breaking Travel News, February 11, 2021](#)



# *Tourism and COVID-19 dashboard and reporting resources*

- Destination BC's new [Tourism Industry Dashboard](#) tracks statistics across tourism-related industries including accommodations, food & beverage, and transportation.
- Destination BC's [Signals & Sentiment dashboard](#) follows core markets 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 and analytics companies](#) on their COVID-19 Resource Centre.







## DESTINATION BRITISH COLUMBIA®

This report can be found online on the [Destination BC Research & Insights COVID-19](#) webpage

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