



DESTINATION
BRITISH COLUMBIA®

COVID-19 Research Roundup

March 1, 2021

Ape Lake, Cariboo Chilcotin Coast

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:

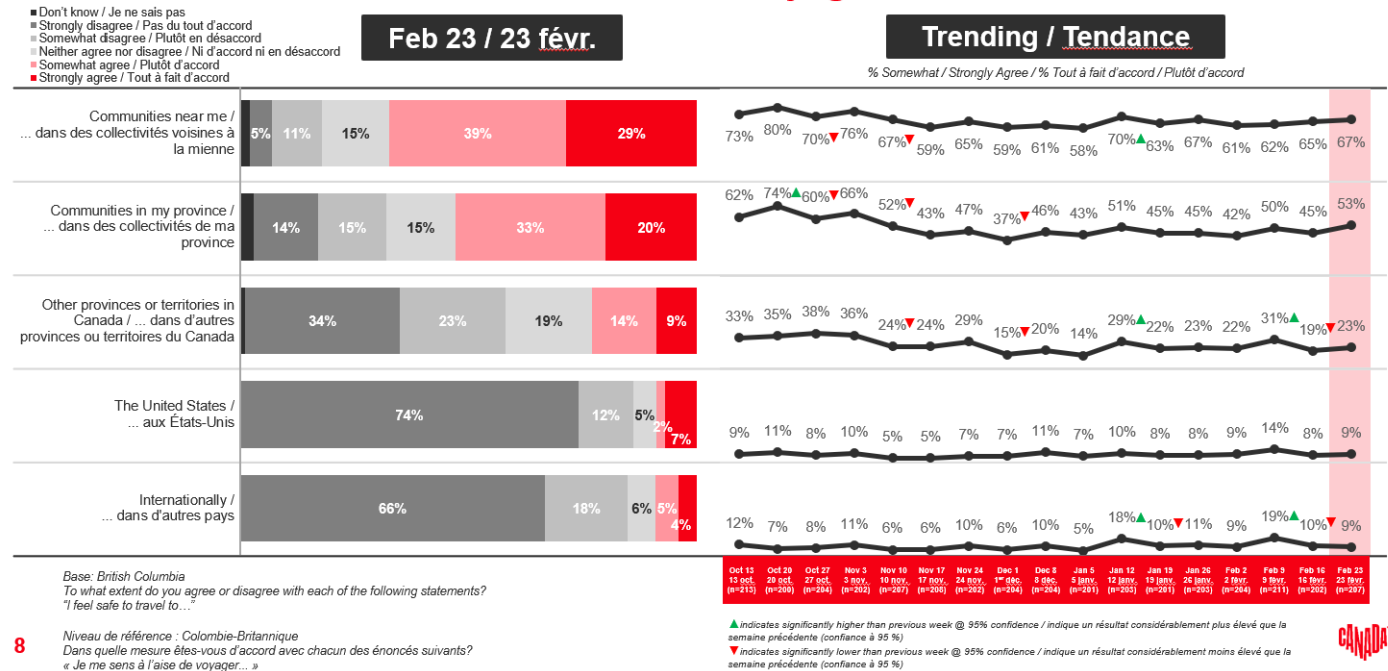
- 67% of BC residents feel safe to travel to nearby communities
- 84% of BC residents intend to travel to nearby communities in the next 12 months
- BC sees a decrease of -0.7% in weekly domestic overnight visitation compared to previous week
- BC sees a decrease of -32.5% in weekly domestic overnight visitation compared to same period last year
- BC's occupancy rate up +2.1 points from the previous week
- BC's average daily rate (\$127.78) up +1.1% from the previous week
- BC's revenue per available room (RevPAR) (\$45.99) up +7.3% from the previous week
- BC residents report following COVID-19 rules the least across the country
- All of Canada's key international markets are still closed to international tourism
- Canadians have equally divided opinions about Spring Break occurring
- American travel sentiment metrics broke 15 positive pandemic records
- Skift reports that over 70% of Americans plan to travel in 2021
- Skift reports international bookings soared 600% in the UK
- Skift shared five trends expected to shape business travel
- Worldwide travel interest-related searches grew significantly year-over-year
- Vaccinated frontlines and vaccination passports emerge in global tourism
- Tourism and COVID-19 dashboard and reporting resources

67% of BC residents feel safe to travel to nearby communities

- In Destination Canada's Wave 35 (February 23, 2021) report, 67% of British Columbians stated they feel safe to travel to nearby communities, whereas 16% of BC residents expressed an opposing view, stating they did not feel safe, resulting in a net score of +51.
- 53% of British Columbians stated they feel safe to travel to other communities in the rest of the province, whereas 29% of BC residents stated they did not feel safe, resulting in a net score of +24.
- A -34 net score was reported by BC residents who feel safe to travel to provinces or territories in Canada, a -77 net score to the US, and a -75 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 35, Leger, February 23, 2021](#)

84% of BC residents intend to travel to nearby communities in the next 12 months

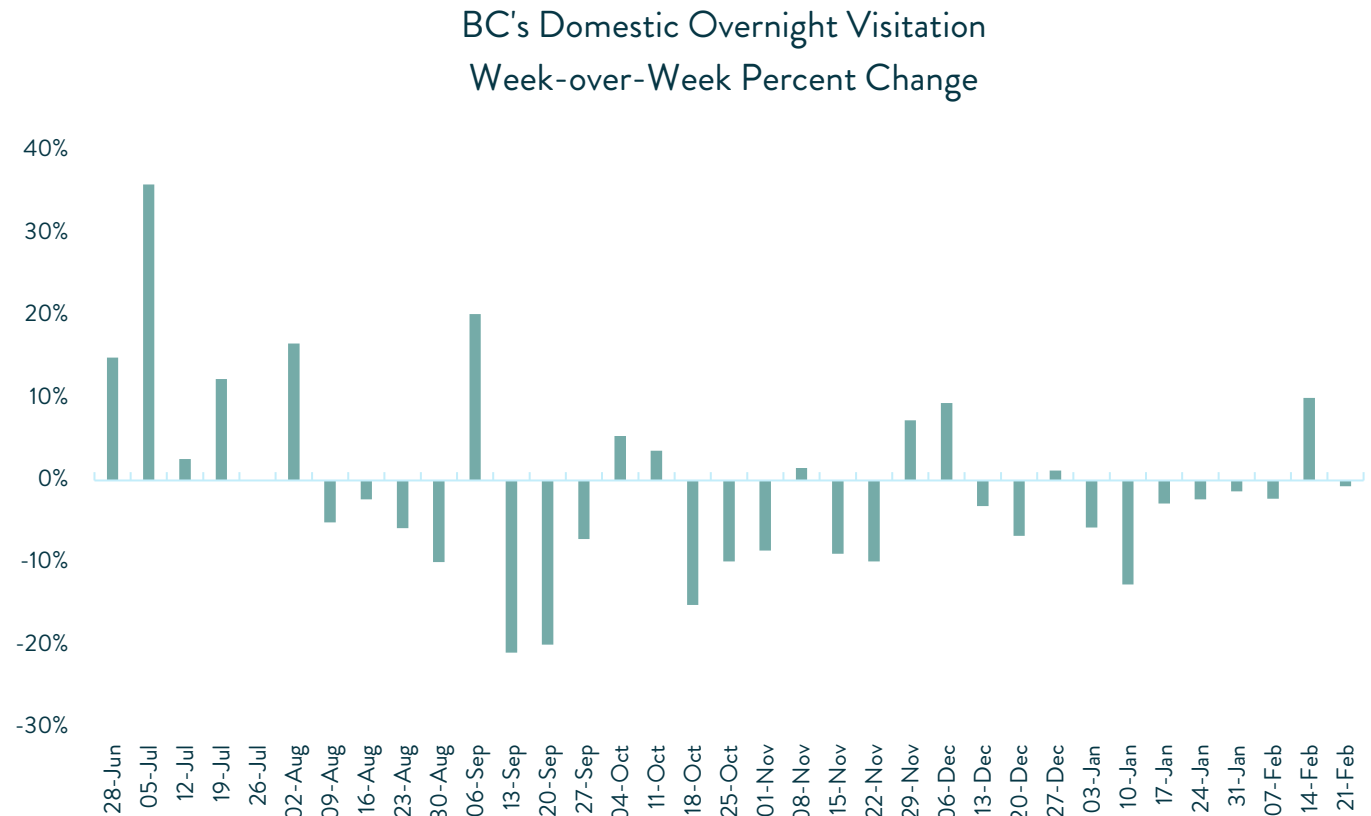
- In Destination BC's BC Residents' Public Perceptions latest survey (Wave 20 - February 17, 2021), 84% of BC residents said they intend to travel to nearby communities in the next 12 months, with 37% intending to travel in the next 3 months.
- 69% of BC residents said they intend to travel elsewhere in BC, with 11% intending to travel in the next 3 months.
- Within the next 12 months, 39% of BC residents said they intend to travel to other provinces in Canada, 19% to the US, and 11% to other countries.



Source: [Destination BC's BC Residents' Public Perceptions: COVID-19 Travel and Tourism Wave 20, Insights West, February 17, 2021](#)

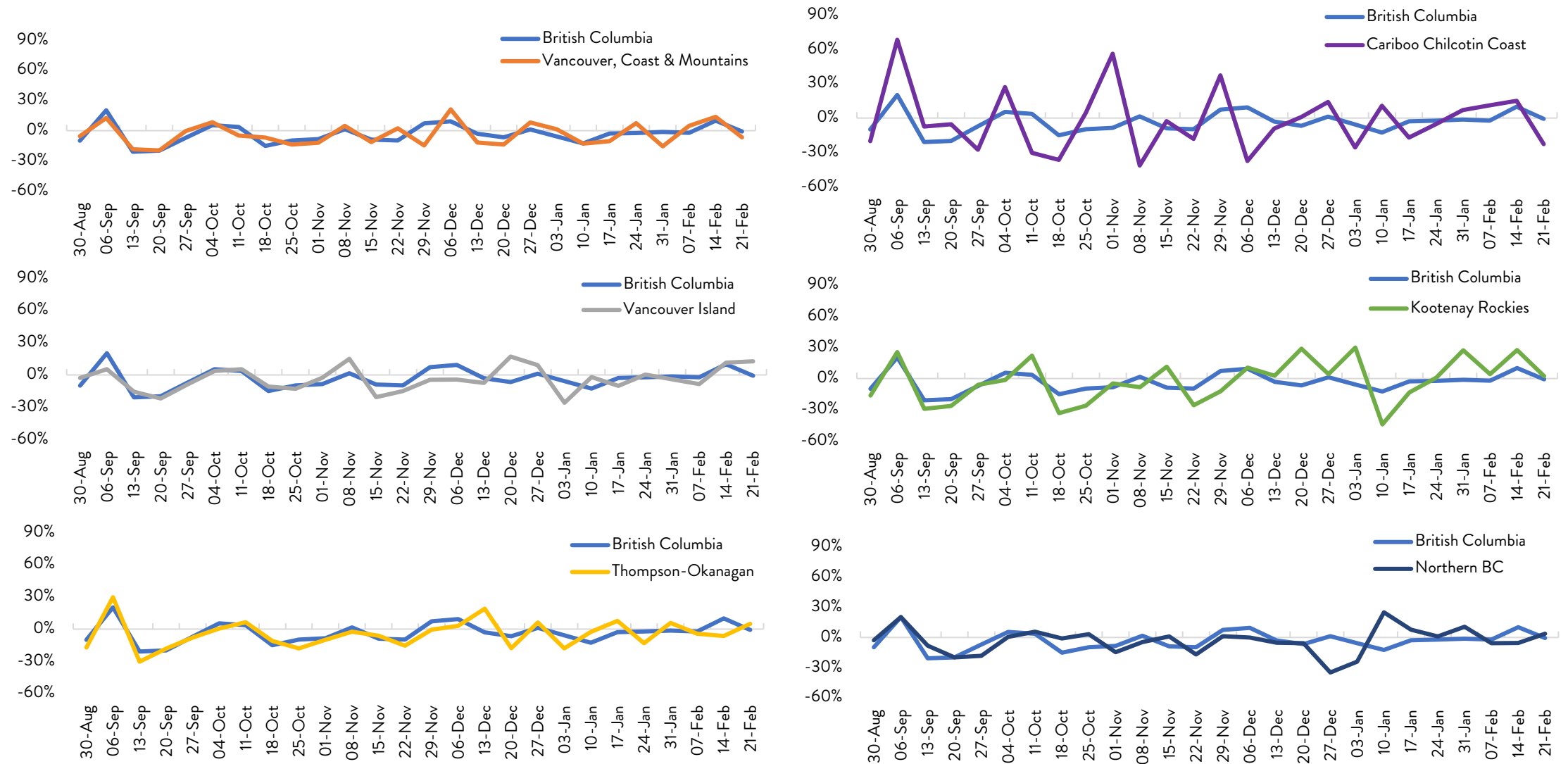
BC sees a decrease of -0.7% in weekly domestic overnight visitation compared to previous week

- According to Environics Analytics Weekly COVID Tracker Report, during the week ending February 21, 2021, BC experienced a week-over-week decrease (-0.7%) in weekly domestic overnight visitation.
- Week-over-week decreases in domestic overnight visitation were seen in two tourism regions:
 - Cariboo Chilcotin Coast (-22.8%)
 - Vancouver, Coast & Mountains (-6.5%)
- However, week-over-week increases in domestic overnight visitation were seen in the remaining four regions:
 - Vancouver Island (+12.7%)
 - Thompson Okanagan (+4.9%)
 - Northern BC (+3.6%)
 - Kootenay Rockies (+2.2%)



Source: [Environics Analytics Weekly COVID Tracker Report, February 21, 2021](#)

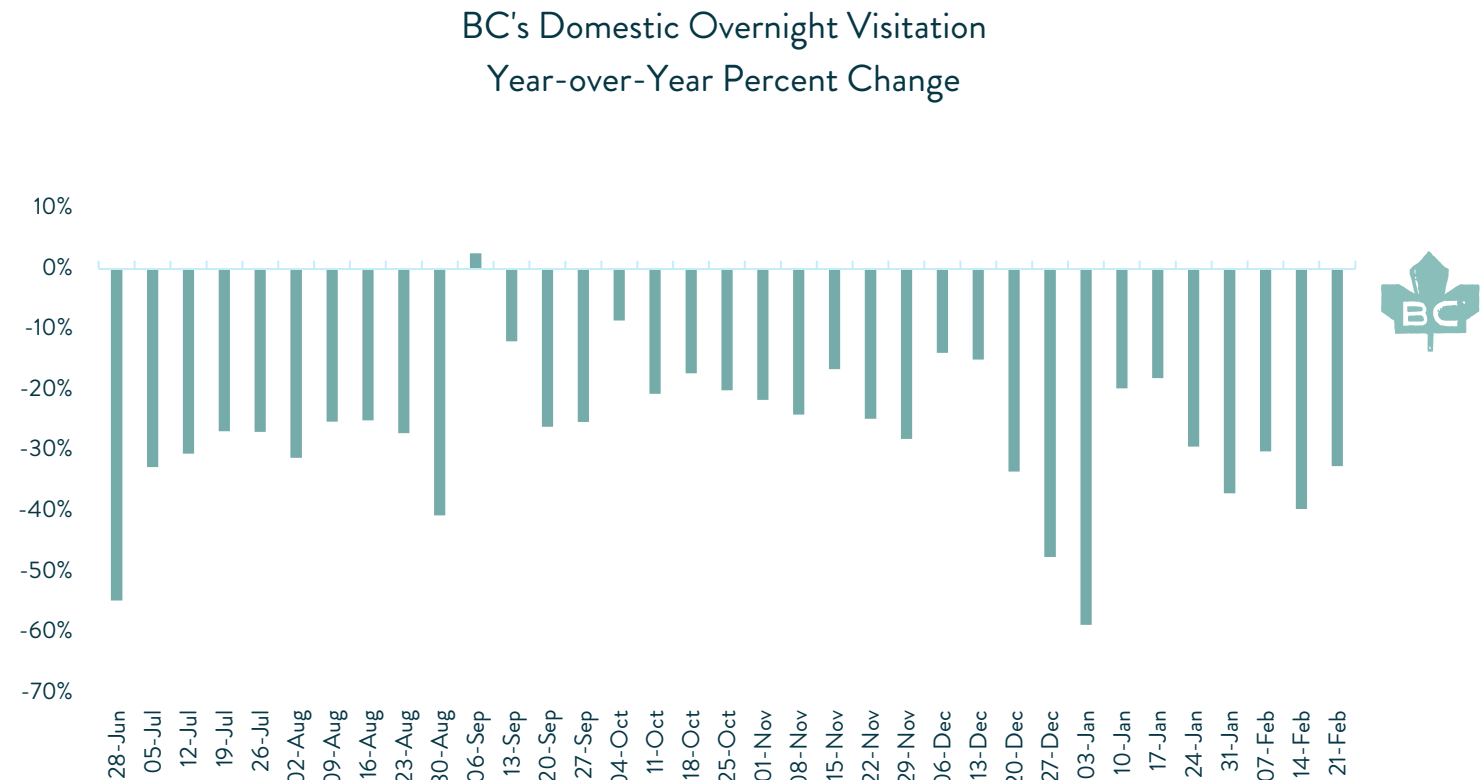
BC and Regional Domestic Overnight Visitation Week-over-Week Percent Change



Source: [Environics Analytics Weekly COVID Tracker Report, February 21, 2021](#)

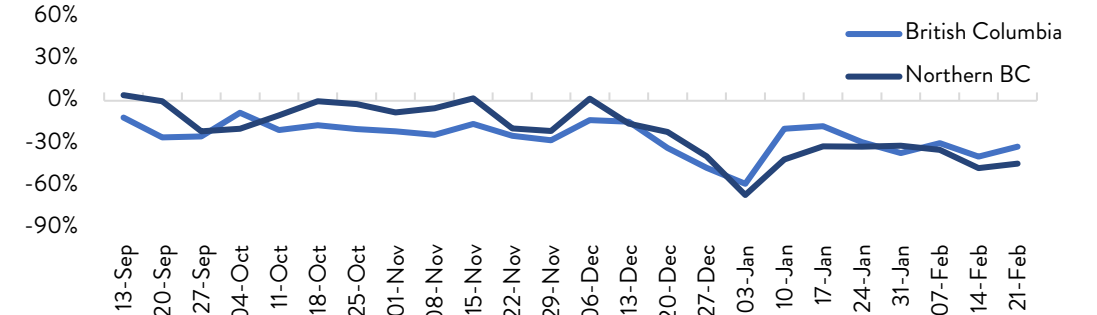
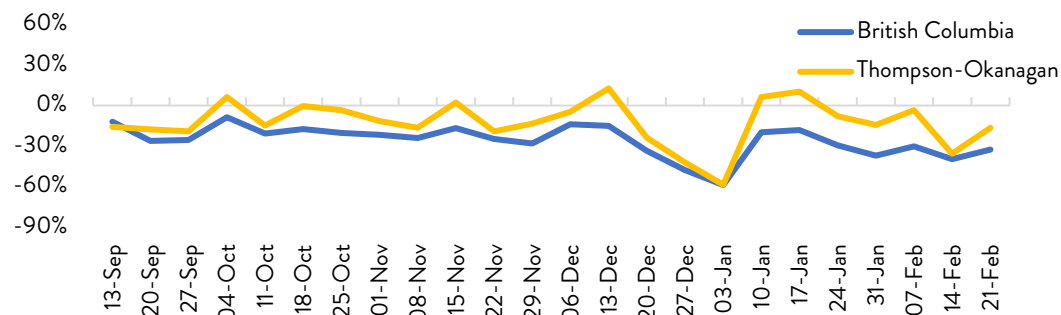
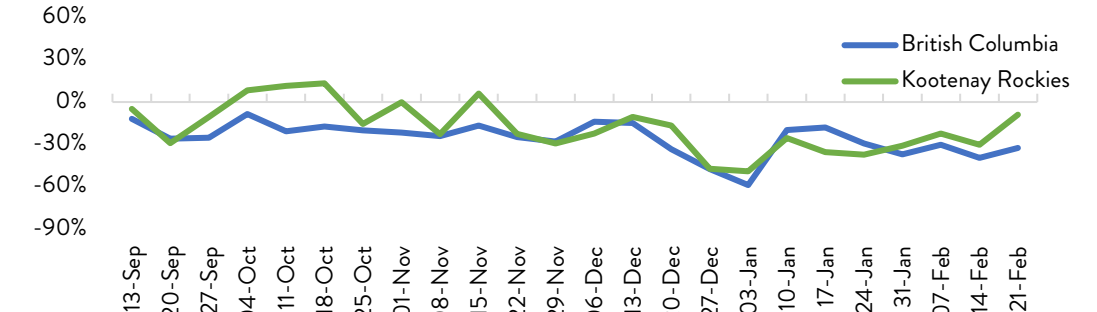
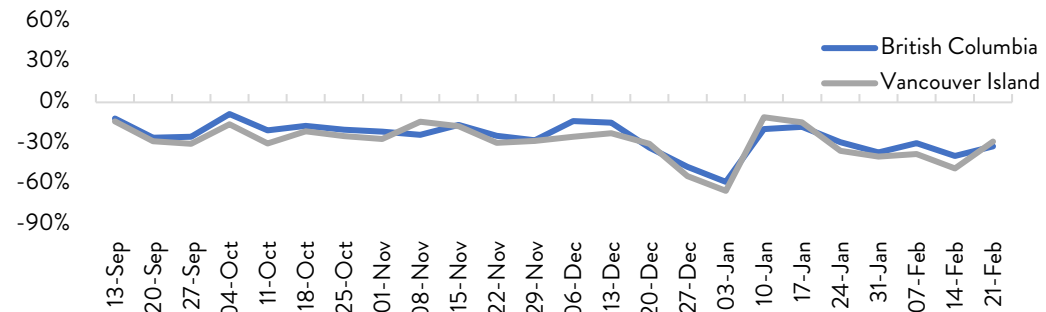
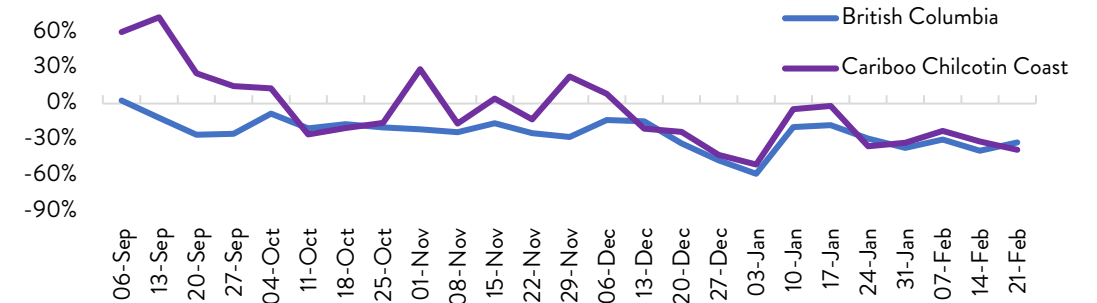
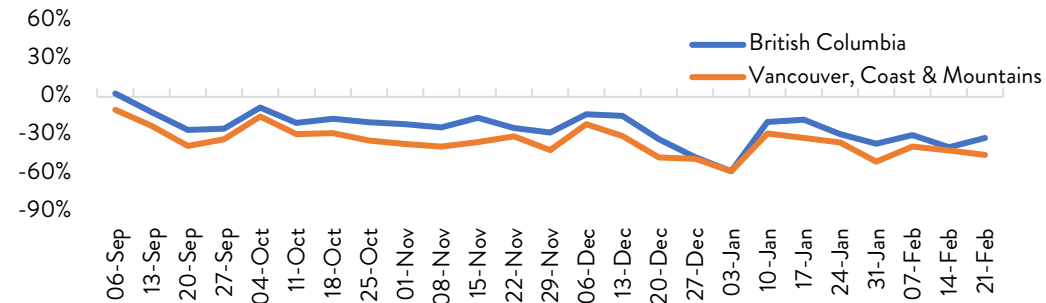
BC sees a decrease of -32.5% in weekly domestic overnight visitation compared to same period last year

- Environics Analytics also reports year-over-year analysis in the Weekly COVID Tracker Report.
- For the week ending February 21, 2021, weekly domestic overnight visitation was down (-32.5%) 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, Coast & Mountains (-45.8%)
 - Northern BC (-44.6%)
 - Cariboo Chilcotin Coast (-38.8%)
 - Vancouver Island (-28.8%)
 - Thompson Okanagan (-16.3%)
 - Kootenay Rockies (-9.0%)



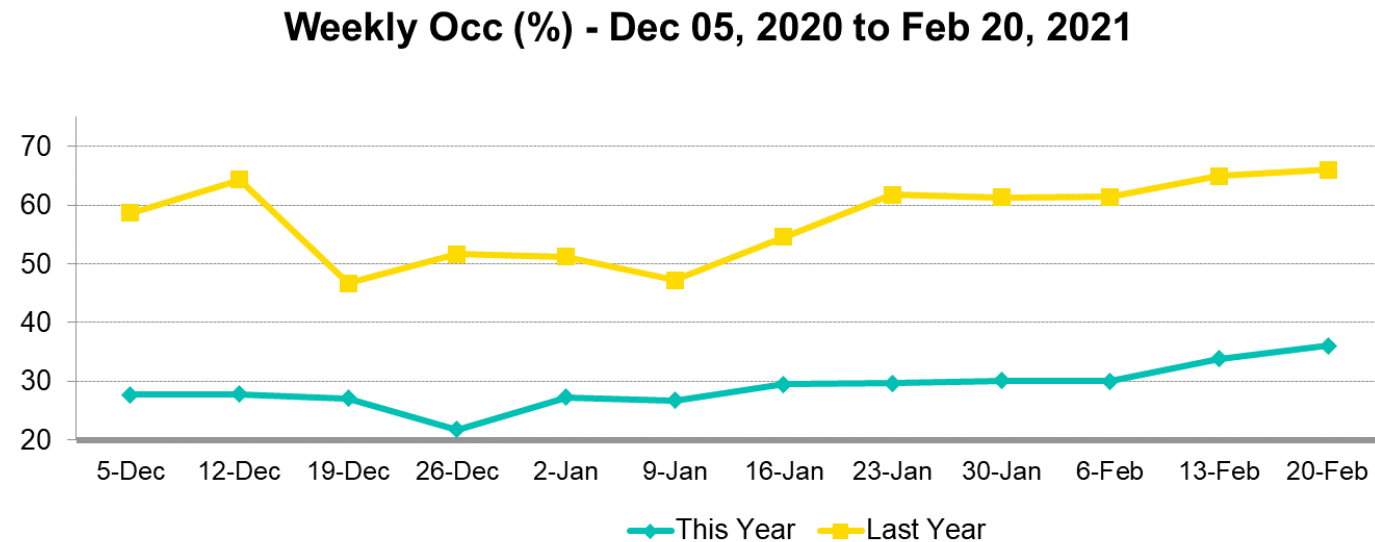
Source: [Environics Analytics Weekly COVID Tracker Report, February 21, 2021](#)

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



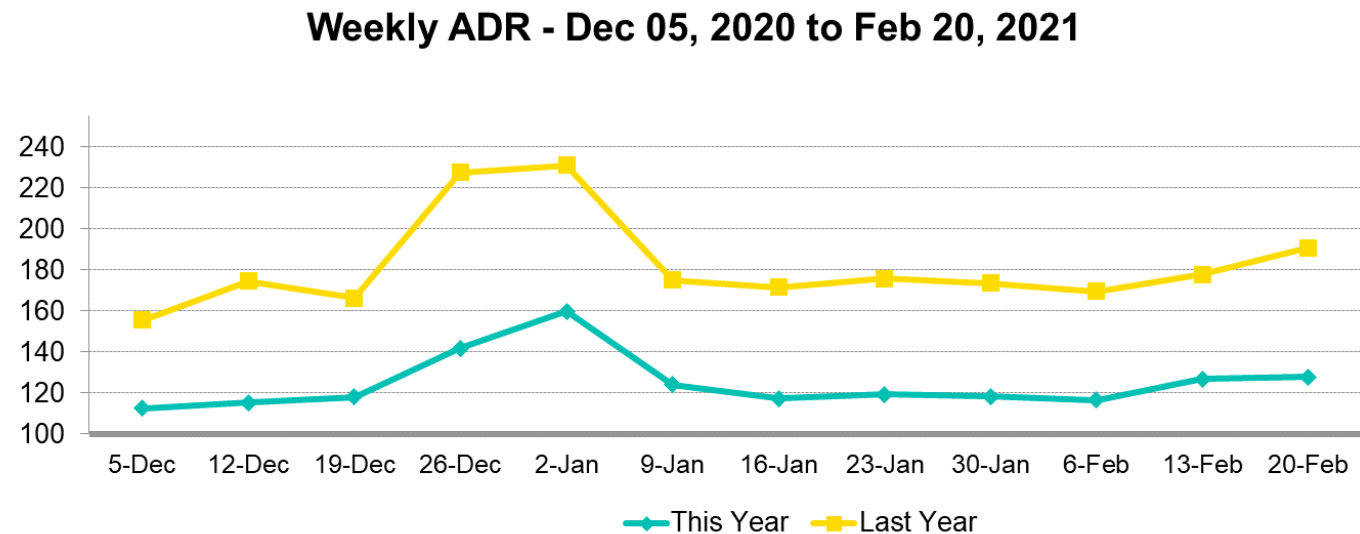
BC's occupancy rate up +2.1 points from the previous week

- STR, an agency which reports BC's hotel performance, shows the average weekly occupancy for BC was 36.0% for the week of February 14 – February 20, 2021. This represents an increase of +2.1 points from the previous week and a decrease of -30.0 points compared to a similar period in 2020.



BC's average daily rate (\$127.78) up +1.1% from the previous week

- STR, an agency which reports BC's hotel performance, shows BC's average daily rate (ADR) was \$127.78 for the week of February 14 – February 20, 2021. This represents an increase of +1.1% from the previous week and a decrease of -33.0% compared to a similar period in 2020.



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

	Feb. 14 - 20, 2021 Occupancy Rate	Week-over-Week Feb. 14 - 20, 2021 vs. Feb. 7 - 13, 2021 Occupancy Point Change	Year-over-Year Feb. 14 - 20, 2021 vs. Feb. 16 - 22, 2020 Occupancy Point Change	Feb. 14 - 20, 2021 ADR	Week-over-Week Feb. 14 - 20, 2021 vs. Feb. 7 - 13, 2021 ADR Percent Change	Year-over Year Feb. 14 - 20, 2021 vs. Feb. 16 - 22, 2020 ADR Percent Change
British Columbia	36.0%	+2.1	-30.0	\$127.78	+1.1%	-33.0%
Vancouver (City of)	24.9%	+1.7	-51.9	\$155.17	+0.0%	-22.6%
Whistler	29.5%	+6.6	-60.3	\$284.41	-13.5%	-58.8%
Victoria	34.5%	+1.0	-42.4	\$124.04	+3.4%	-17.4%
Kelowna	27.5%	-0.5	-23.4	\$104.59	-2.5%	-15.4%
Kamloops	35.8%	+2.7	-11.8	\$91.13	+0.5%	-10.4%
Richmond	43.5%	+4.5	-27.5	\$118.01	+0.6%	-25.5%



BC's revenue per available room (RevPAR) (\$45.99) up +7.3% from the previous week

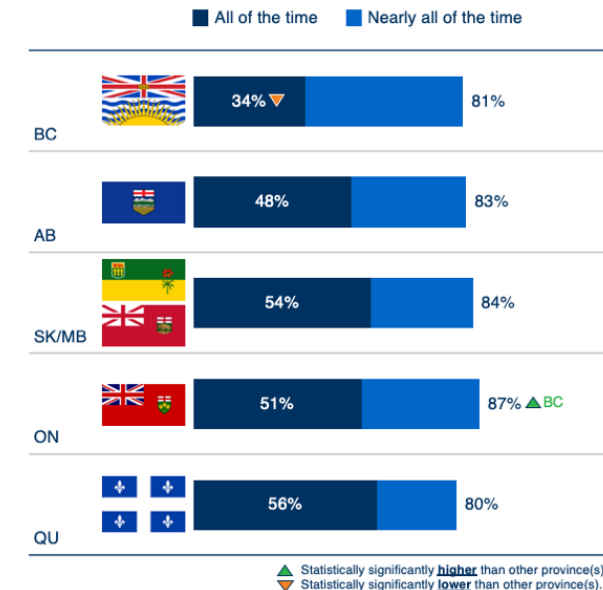
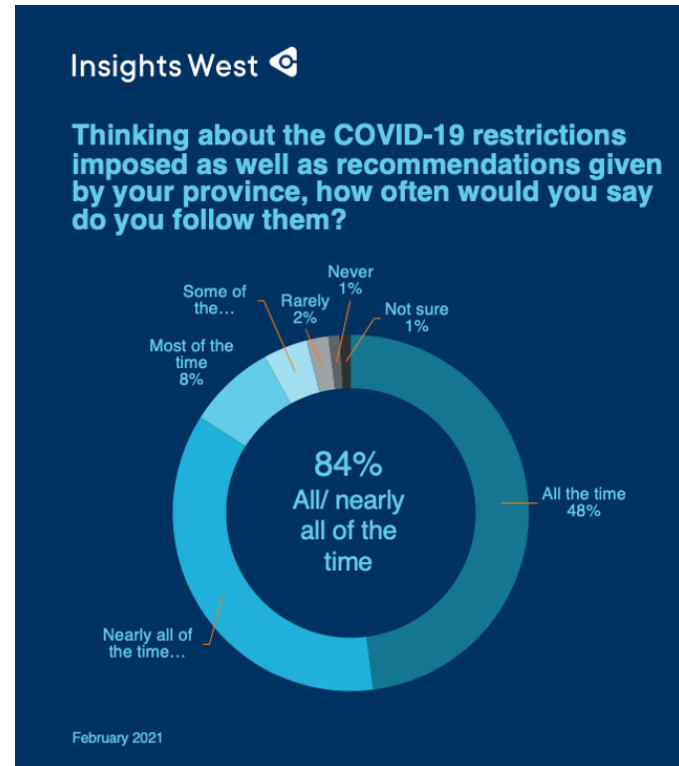
- STR, an agency which reports BC's hotel performance, shows BC's revenue per available room (revPAR) was \$45.99 for the week of February 14 – February 20, 2021. This represents an increase of +7.3% from the previous week and a decrease of -63.4% compared to a similar period in 2020.

	Feb. 14 - 20, 2021 RevPAR	Week-over-Week Feb. 14 - 20, 2021 vs. Feb. 7 - 13, 2021 RevPAR Percent Change	Year-over-Year Feb. 14 - 20, 2021 vs. Feb. 16 - 22, 2020 RevPAR Percent Change
British Columbia	\$45.99	+7.3%	-63.4%
Vancouver (City of)	\$38.62	+7.2%	-74.9%
Whistler	\$83.92	+11.7%	-86.5%
Victoria	\$42.82	+6.5%	-62.9%
Kelowna	\$28.81	-4.1%	-54.3%
Kamloops	\$32.67	+9.0%	-32.6%
Richmond	\$51.33	+12.2%	-54.4%



Nearly half of Canadians reported following COVID-19 restrictions and recommendations all of the time

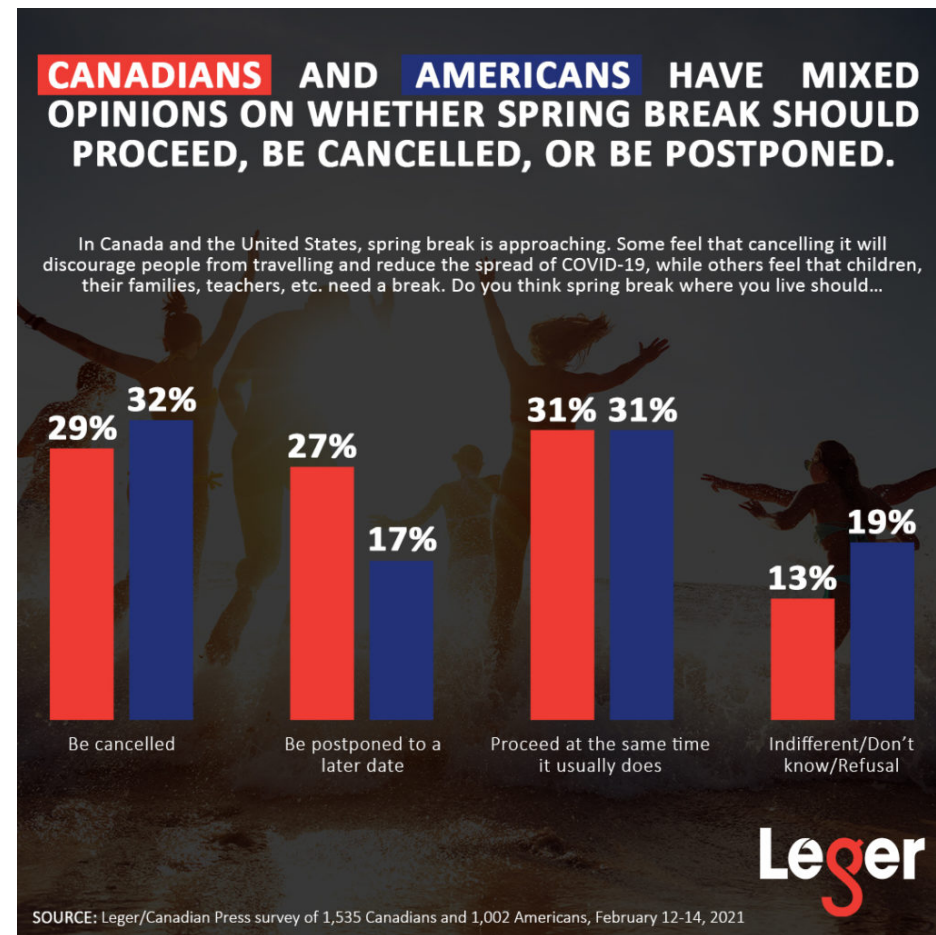
- A recent survey by Insights West showed that overall, 48% of Canadians claim to be following all of the rules 'all of the time', with 36% claiming to follow them 'nearly all of the time'.
- Compared to residents of other Canadian provinces, BC residents indicated following COVID-19 restrictions and recommendations 'all the time' the least, with 34% of British Columbia residents stating so versus 48% of Alberta residents, 51% of Ontario residents, and 58% of Quebec residents.
- Justifications for Canadians not following all of the rules all the time include "I'm really careful when I do so" (41%), "I keep my bubble small, so... I feel I'm still doing the right thing" (38%) and "I need to... to make sure that I stay happy and mentally healthy" (31%).



Source: [Insights West, February 19, 2021](#)

Canadians have equally divided opinions toward Spring Break occurring

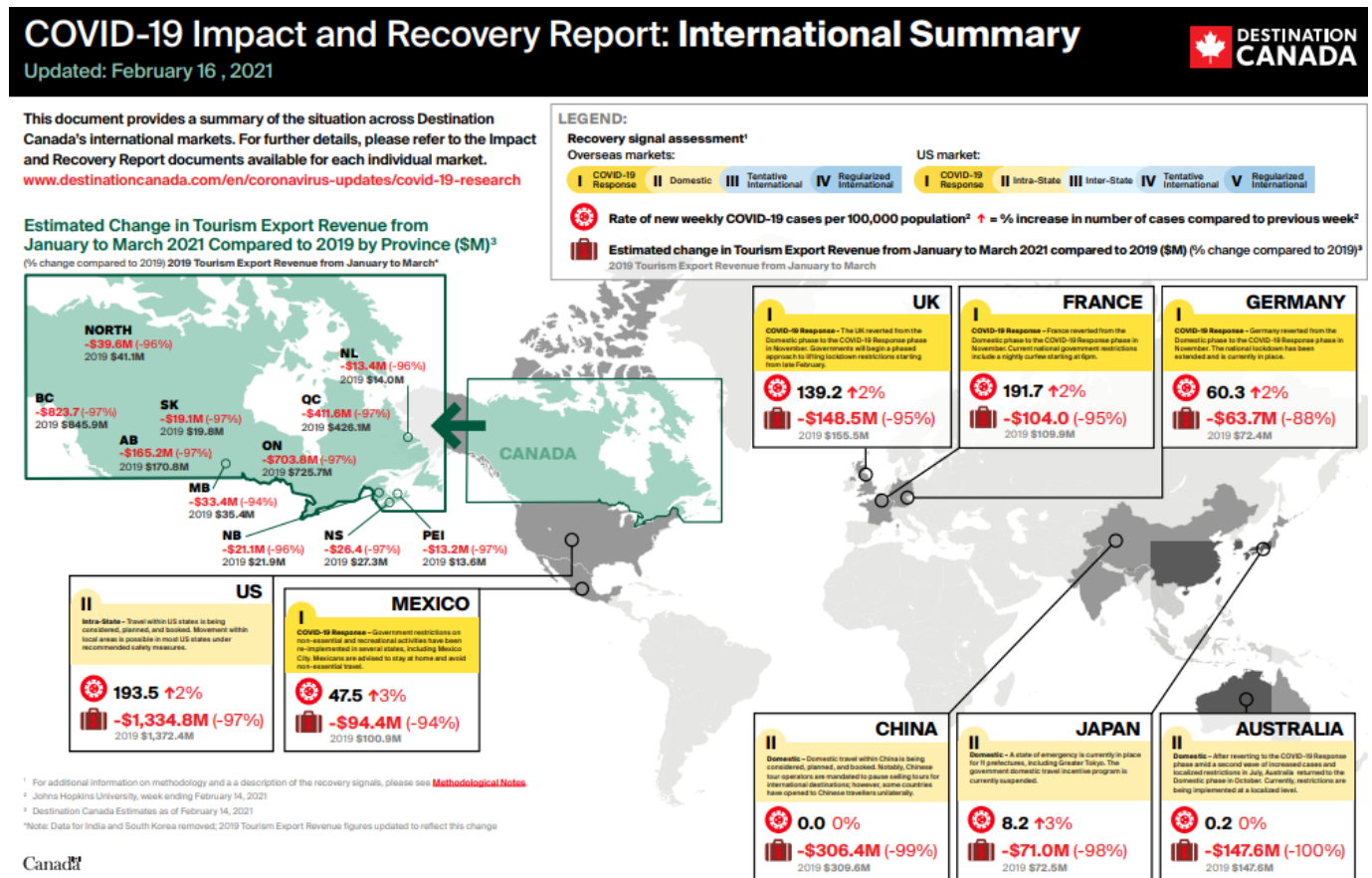
- Leger's North American Tracker survey reports that 29% of Canadians think Spring Break should be cancelled, while 27% said it should be postponed. 31% said it should proceed as usual.
- 8% of Canadians said that they or someone in their household plan(s) to travel during Spring Break, compared to 18% of Americans.



Source: [Leger's North American Tracker, February 23, 2021](#)

All of Canada's key international markets are still closed to international tourism

- Destination Canada's International Summary for COVID-19 Impact and Recovery showed that the US, China, Japan, and Australia are in Stage II of recovery and are now allowing domestic travel, while the UK, France, Germany, and Mexico continue to be designated as Stage I.



Source: COVID-19 International Summary, Destination Canada, February 16, 2021



American travel sentiment metrics broke 15 positive pandemic records

- Destination Analysts, a US-based tourism research company, announced that 15 travel sentiment metrics broke pandemic records in a positive way for the week of February 21, 2021.
- Positive record highs included level of excitement about travel in 2021, readiness state-of-mind around travel, and making travel plans specifically in anticipation of vaccine distribution.
- Positive record lows included perceptions of travel and leisure activities as unsafe, avoidance of travel until pandemic is more resolved, and agreement that travel should be for essential needs only.

POSITIVE RECORD HIGHS

- Optimism about the course of the pandemic in the United States in next month (44.2%)
- Level of excitement about travel in 2021 (6.2/10)
- Readiness state-of-mind around travel (60.2%)
- Those who have received or know friends or relatives who have received the vaccine (62.7%)
- Making of travel plans specifically in anticipation of vaccine distribution (34.8%)
- Proportion who will take at least one leisure trip in the next 3 months (52.9%)
- Happiness with ads promoting their own community for tourism (41.9%)

POSITIVE RECORD LOWS

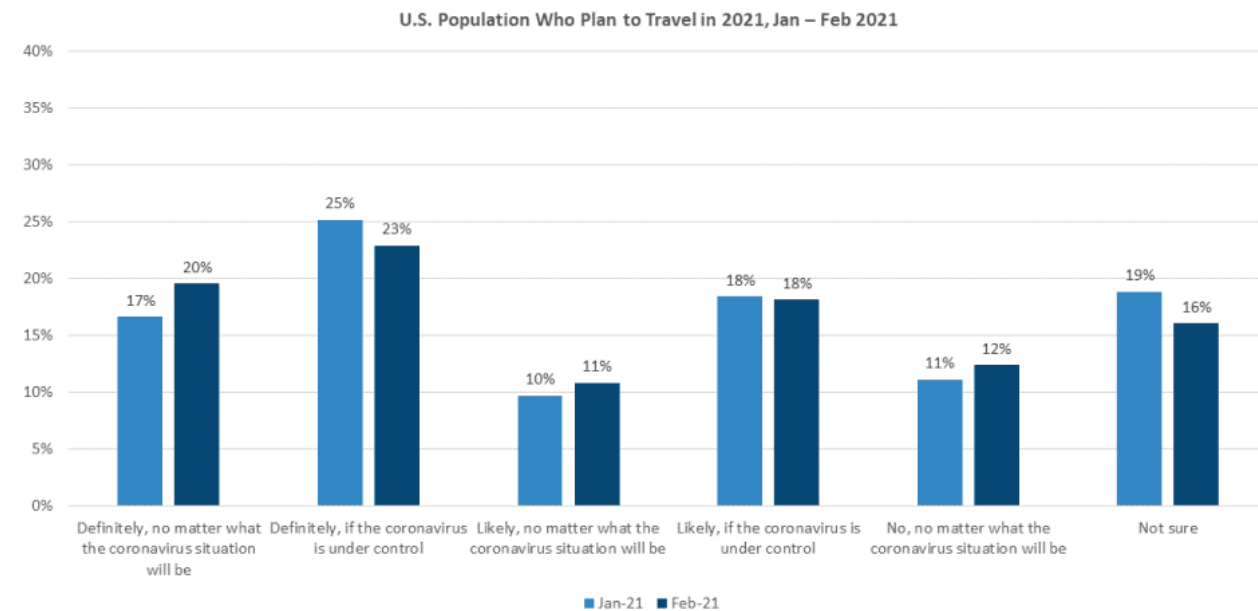
- Perceptions of travel and leisure activities as unsafe (45.7%)
- Strong concern about the virus' impact on personal finances (52.2%)
- Avoidance of travel until pandemic is more resolved (45.3%)
- Avoidance of conferences and conventions (63.2%)
- Agreement that travel should be for essential needs only (48.7%)
- Travel guilt (42.7%)
- Refusal to travel until vaccines are widely available (46.5%)
- Tourists in their own community are unwanted (48.3%).

Source: [Destination Analysts, February 23, 2021](#)



Skift reports that over 70% of Americans plan to travel in 2021

- Skift's US Travel Tracker Survey showed that in February, 72% of Americans plan to travel in 2021. This is two points higher than reported in early January.



Monthly n = ~1000
Source: Skift Research, February 2021

Source: [Skift, US Travel Tracker Survey, February 18, 2021](#)



Skift reports international bookings soared 600% in the UK

- According to Skift, international holiday bookings increased by up to 600% in the UK. This is due to new plans by the country to gradually relax coronavirus restrictions.
- The government said that travel may restart by mid-May, giving many operators hope that the summer will end the revenue decreases seen over the past several months.



Source: [Skift, February 23, 2021](#)



Skift shared five trends expected to shape business travel

- A new report by Skift shared five trends that are expected to define the future of business travel. The trends include:
 1. Travel Managers Are Now Risk Managers
 2. Reinventing the Relationship Between Business Travel and Spend Management
 3. Cloud-Based, Integrated, End-to-End Solutions Are Essential
 4. Consumer Travel Will Kickstart a Business Travel Renaissance
 5. Remote Work Will Place Greater Importance on Corporate Travel



Source: [Skift, February 23, 2021](#)

Worldwide travel interest-related searches grew significantly year-over-year

- Think with Google shared recent insights into search trends that show worldwide travel interest is increasing.
- Searches such as “resorts near me”, “hotel booking app”, and “passport size” have all grown significantly year-over-year.
- “Travel to” searches have grown 100% year-over-year. One top “travel to” search includes “travel to Canada”.



What people are searching for Travel Interest

Searches for “**resorts near me**” have grown globally by over 80% YOY.

TOP SEARCHES INCLUDE

“best resorts near me,” “holiday resorts near me,” “skiing resorts near me,” “family resorts near me,” and “spa resorts near me”

Searches for “**hotel booking app**” have grown globally by over 100% YOY.

TOP SEARCHES INCLUDE

“online hotel booking app,” “best hotel booking app,” “best hotel booking app in india,” “oyo online hotel booking app,” “treebo hotel booking app,” “reddoorz hotel booking app,” and “trivago hotel booking app”

Searches for “**passport size**” have grown globally by over 60% YOY.

TOP SEARCHES INCLUDE

“passport size photo app,” “passport size photo,” “passport size photo near me,” “passport size photo editor,” “passport size picture,” “passport size photo dimensions,” and “passport size photo maker”

Searches for “**travel to**” have grown globally by over 100% YOY.

TOP SEARCHES INCLUDE

“travel to dubai,” “travel to canada,” “travel to france,” “can i travel to wales,” “travel to uk,” “travel to spain,” “can tier 3 travel to tier 2,” “travel to mexico,” and “travel to hawaii”

Think with Google

Source: Google Data, Global English, Nov. 24, 2020–Jan. 22, 2021 vs. Nov. 24, 2019–Jan. 22, 2020.

Source: [Think with Google, February 2021](#)



Vaccinated frontlines and vaccination passports emerge in global tourism

- [Emirates](#) operated its first flight with a fully vaccinated frontline team at every servicing touchpoint.
- [Air New Zealand](#) is trialing a digital vaccination passport between Auckland and Sydney starting in April.
- [Iceland](#) has begun issuing and recognizing COVID-19 vaccination certificates in hopes to allow travel.
- [Israel](#) is preparing to reopen its economy using a badge system based on vaccination.



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.





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

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