



DESTINATION
BRITISH COLUMBIA®

COVID-19 Research Roundup

March 15, 2021



Parksville, Vancouver Island

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.





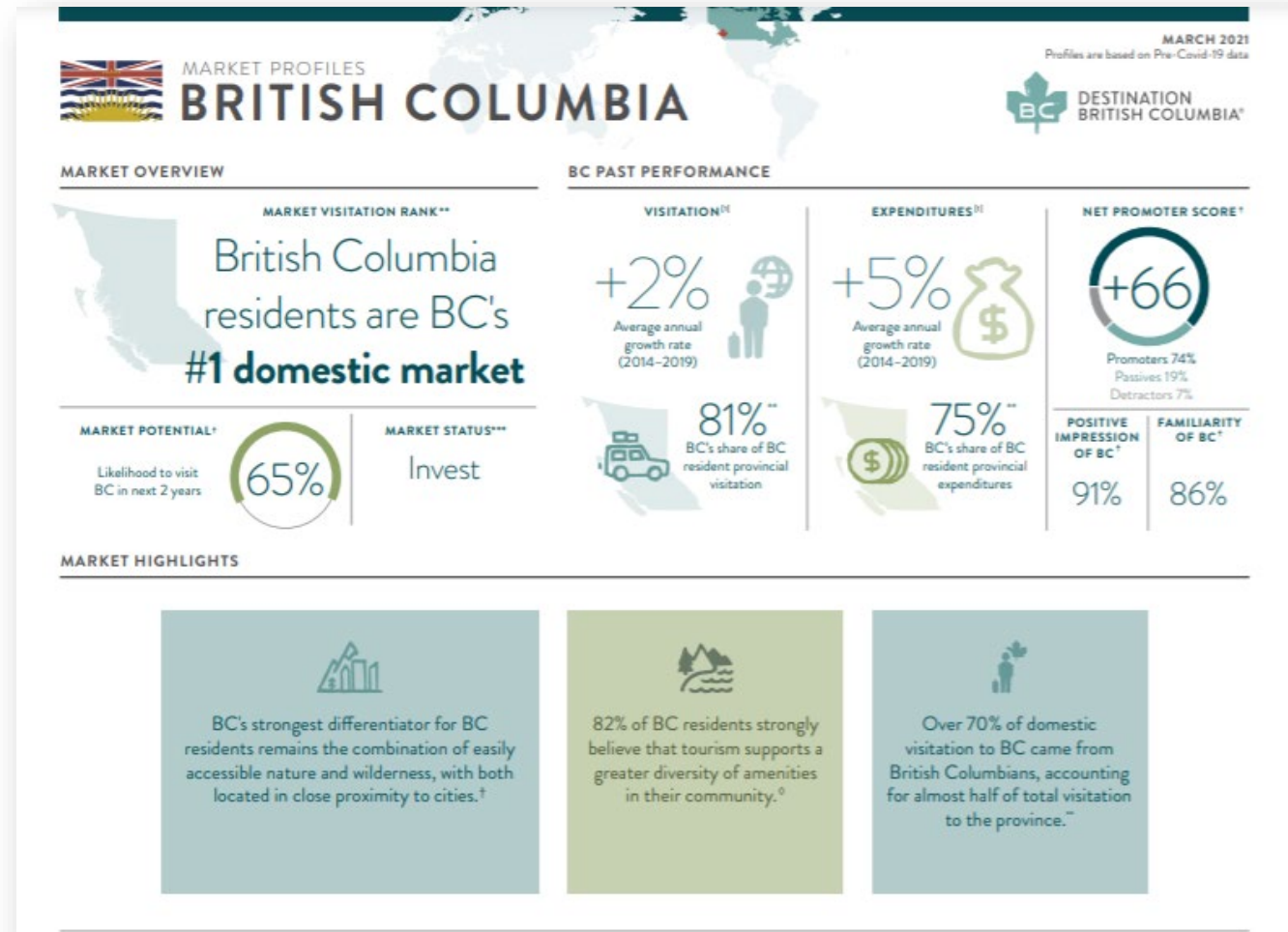
Destination BC is rounding up relevant research and articles each week related to the travel and tourism industry and COVID-19.

Last week in brief:

- Destination BC releases profiles of BC's key markets summarizing 2019 travellers
- 73% of BC residents feel safe to travel to nearby communities
- 81% of BC residents intend to travel to nearby communities in the next year
- BC sees an increase of +9.6% in weekly domestic overnight visitation compared to previous week
- BC sees a decrease of -47.3% in weekly domestic overnight visitation compared to same period last year
- BC's occupancy rate (36.2%) up +0.5 points from the previous week
- BC's average daily rate (\$133.26) up +5.7% from the previous week
- BC's revenue per available room (RevPAR) (\$48.24) up +7.1% from the previous week
- A shift to Canadian domestic tourism could accelerate tourism revenue recovery by a year according to Destination Canada
- 54.4% of American travellers are interested in using a Visitor Information Center in 2021
- 38.8% of American travellers intend to visit an urban area in the next 3 months
- Top COVID-19 impacts on travel plans for Americans are reducing number of trips and choosing drive destinations
- UNWTO reports 32% of worldwide destinations were closed to international tourism
- Skift shares 10 travel and tourism learnings after a year of the pandemic
- Tourism and COVID-19 dashboard and reporting resources

Destination BC releases profiles of BC's key markets summarizing 2019 travellers

- With consideration turning towards recovery, Destination BC has released market profiles for BC's 13 primary markets.
- The profiles summarize 2019 market size, volume and expenditures in BC, traveller and trip characteristics, market insights, and top trends.
- These insights and more can be found on the [Destination BC Research & Insights portal](#).



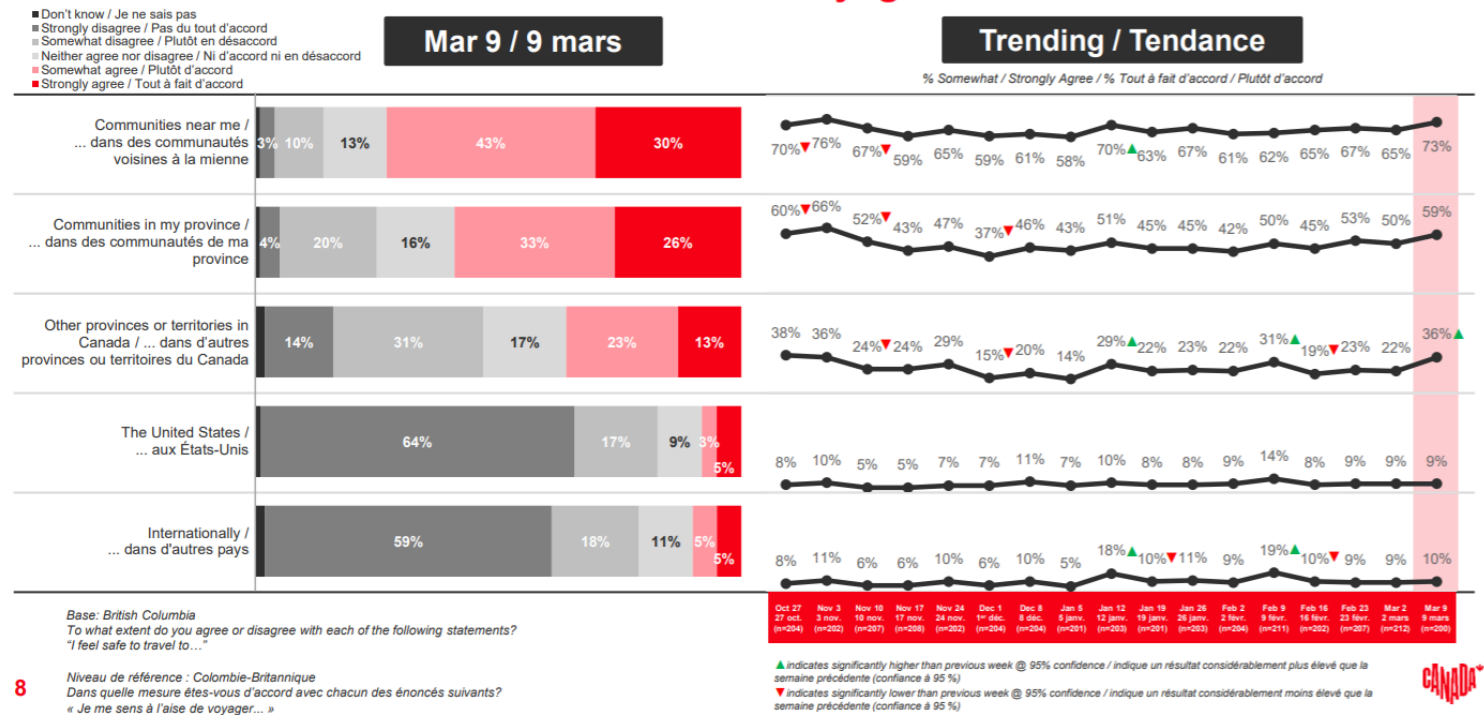
Source: [Destination BC, March 2021](#)

73% of BC residents feel safe to travel to nearby communities

- In Destination Canada's Wave 37 (March 9, 2021) report, 73% of British Columbians stated they feel safe to travel to nearby communities, whereas 13% of BC residents expressed an opposing view, stating they did not feel safe, resulting in a net score of +60, up from +43 the previous week.
- 59% of British Columbians stated they feel safe to travel to other communities in the rest of the province, whereas 24% of BC residents stated they did not feel safe, resulting in a net score of +35, up from +18 the previous week.
- A -9 net score was reported by BC residents who feel safe to travel to other provinces or territories in Canada, a -72 net score to the US, and a -67 net score to other countries.

British Columbia / Colombie-Britannique

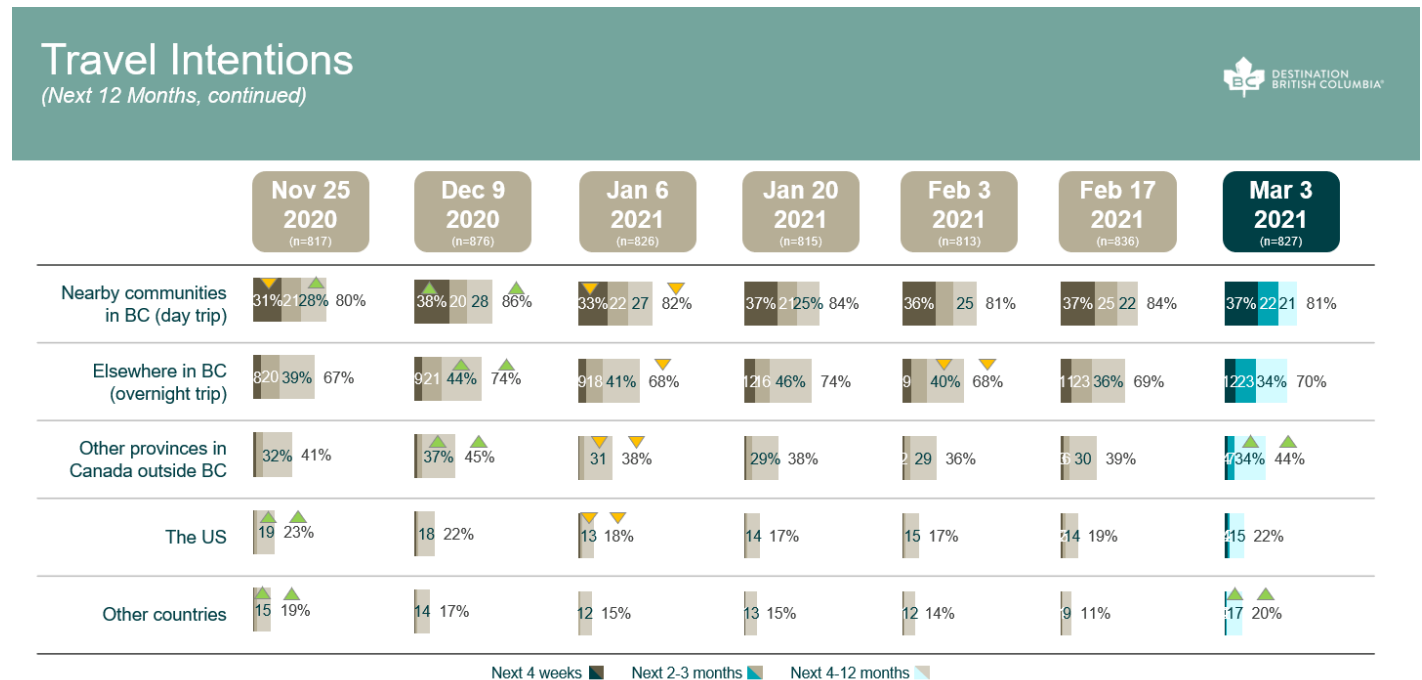
I feel safe to travel / Je me sens à l'aise de voyager



Source: [Destination Canada's Weekly Resident Sentiment, Wave 37, Leger, March 9, 2021](#)

81% of BC residents intend to travel to nearby communities in the next year

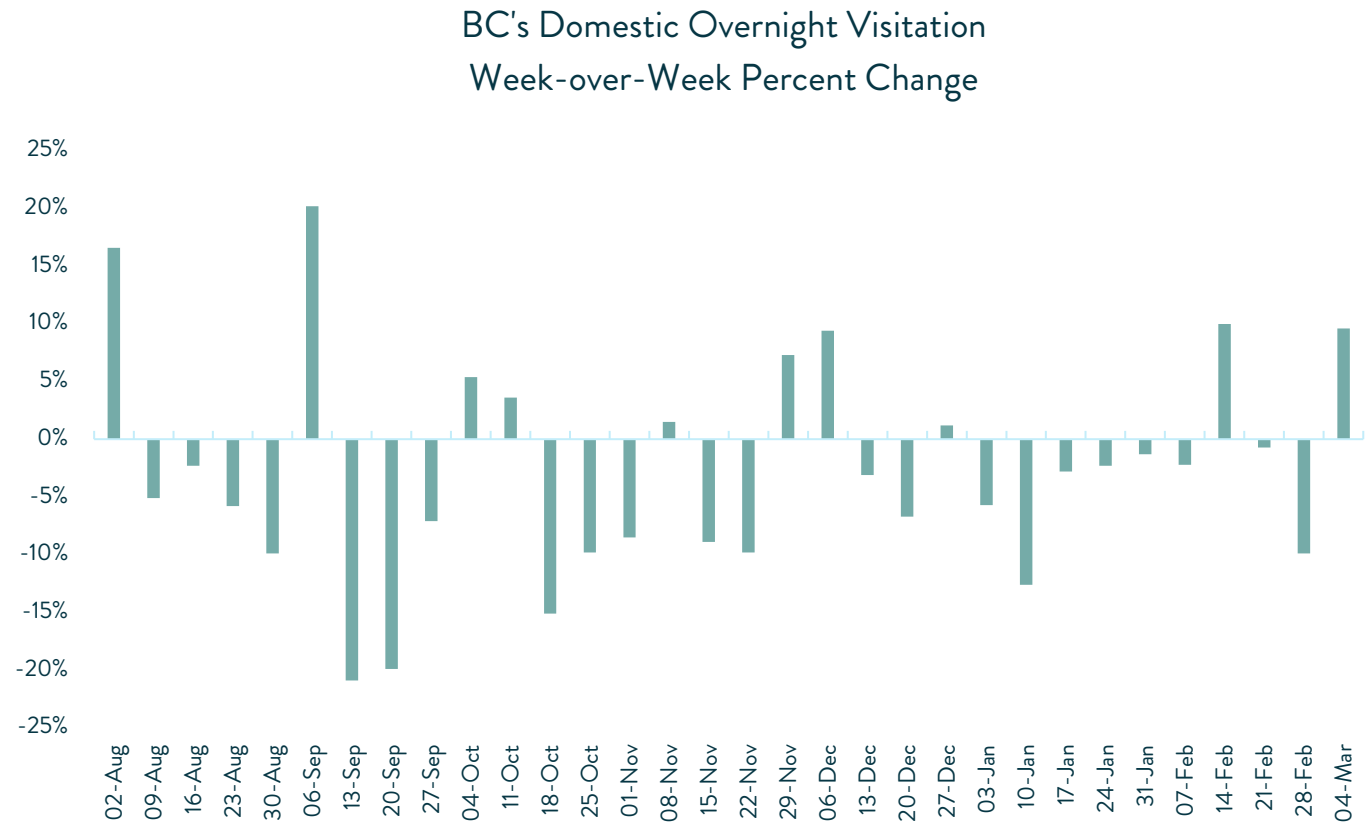
- In Destination BC's BC Residents' Public Perceptions Wave 21 (March 3, 2021) report, 81% of BC residents said they intend to travel to nearby communities in BC in the next 12 months. 70% said they intend to travel elsewhere in BC.
- 44% of BC residents said they intend to travel to other provinces in Canada in the next 12 months (up 5% from February 17), compared to 22% to the US (no change seen from February 17) and 20% to other countries (up 9% from February 17).



Source: [Destination BC's BC Residents' Public Perceptions: COVID-19 Travel and Tourism Wave 21, Insights West, March 3, 2021](#)

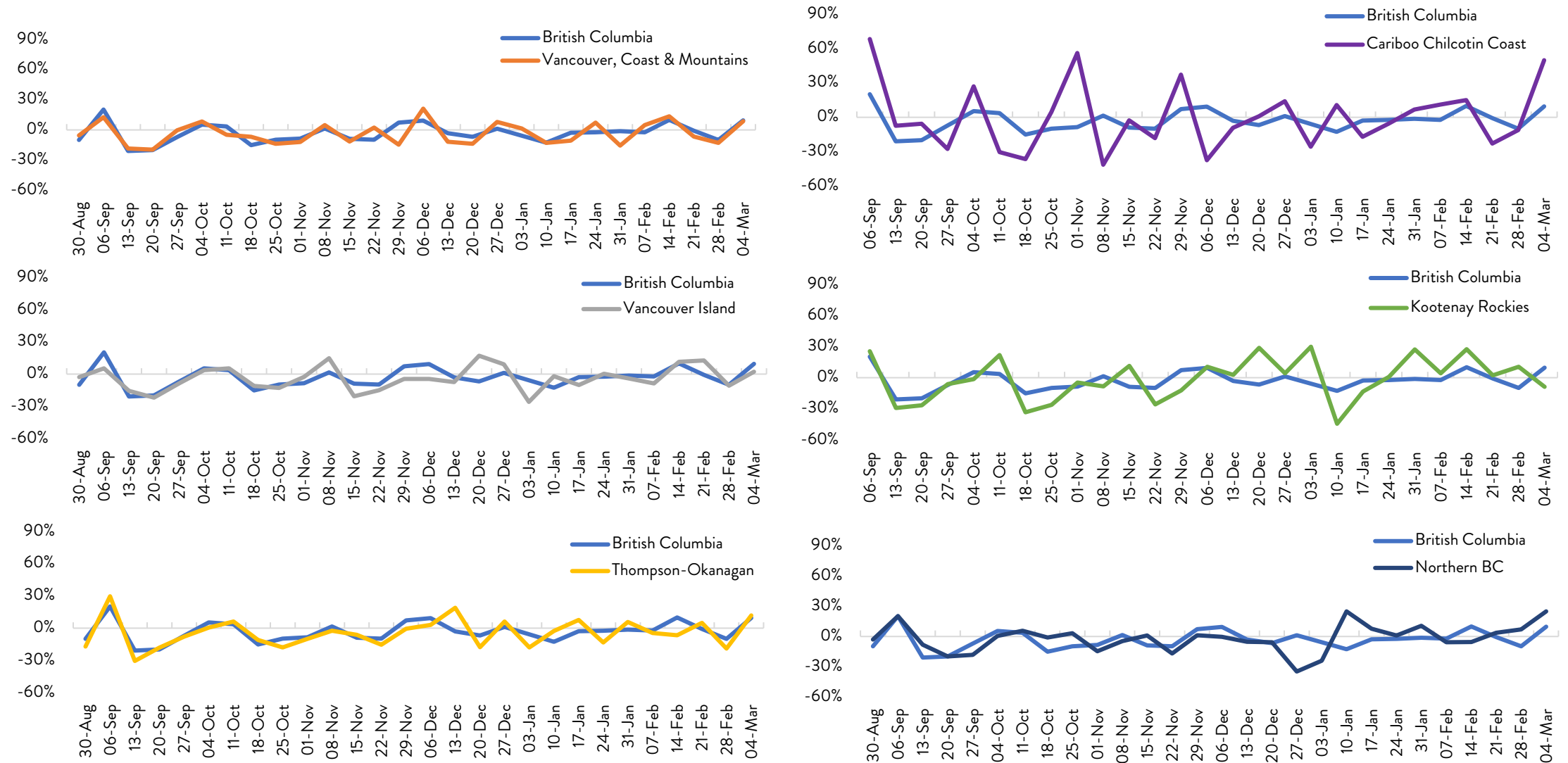
BC sees an increase of +9.6% in weekly domestic overnight visitation compared to previous week

- According to Environics Analytics Weekly COVID Tracker Report, during the week ending March 4, 2021, BC experienced a week-over-week increase of +9.6% in weekly domestic overnight visitation.
- Week-over-week increase in domestic overnight visitation were seen in five of the six tourism regions:
 - Cariboo Chilcotin Coast (+49.8%)
 - Northern BC (+24.8%)
 - Thompson Okanagan (+11.8%)
 - Vancouver, Coast & Mountains (+8.7%)
 - Vancouver Island (+2.2%)
- The Kootenay Rockies (-8.8%), however, saw a week-over-week decrease in domestic overnight visitation.



Source: [Environics Analytics Weekly COVID Tracker Report, March 4, 2021](#)

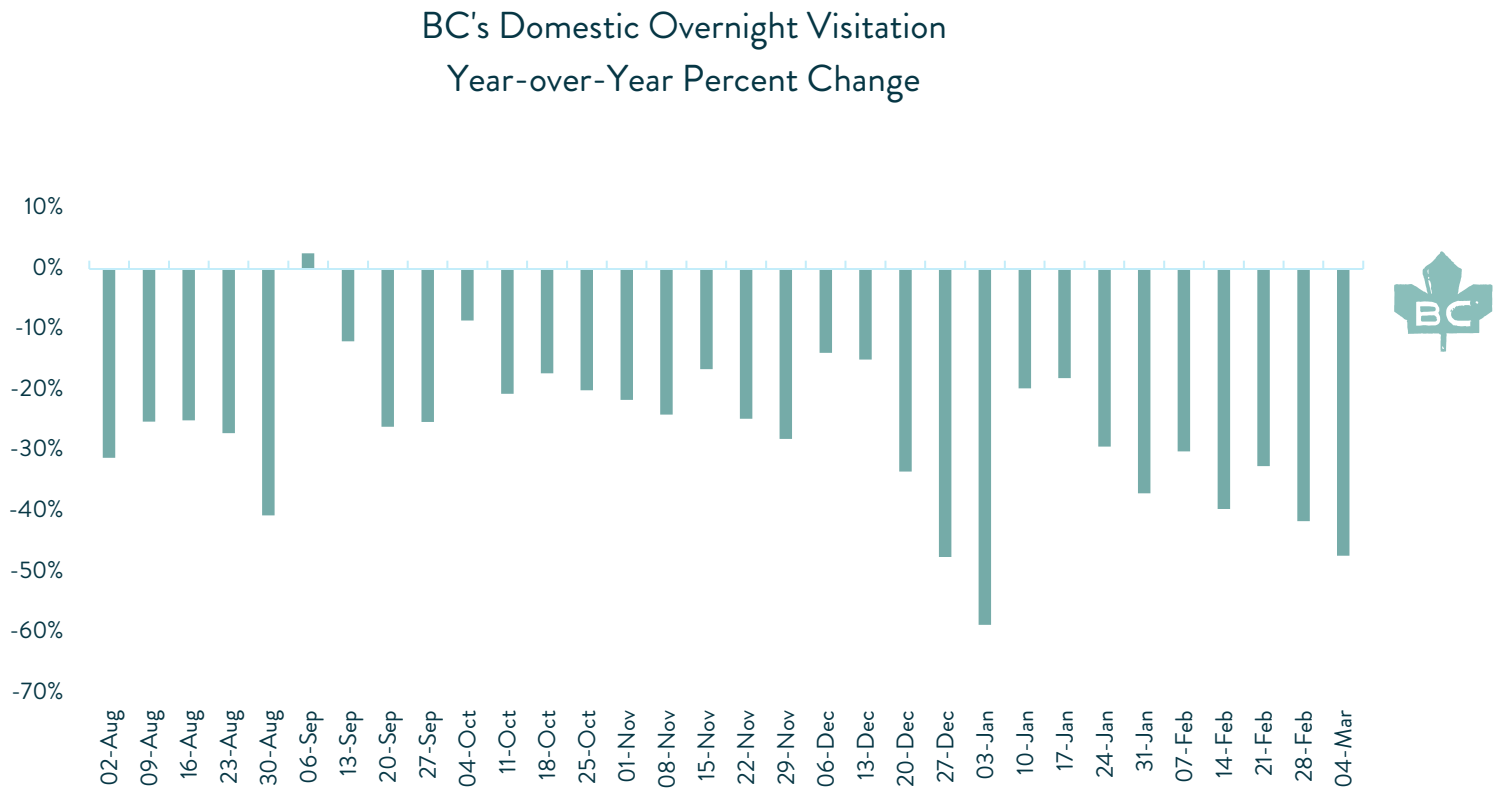
BC and Regional Domestic Overnight Visitation Week-over-Week Percent Change



Source: [Environics Analytics Weekly COVID Tracker Report, March 4, 2021](#)

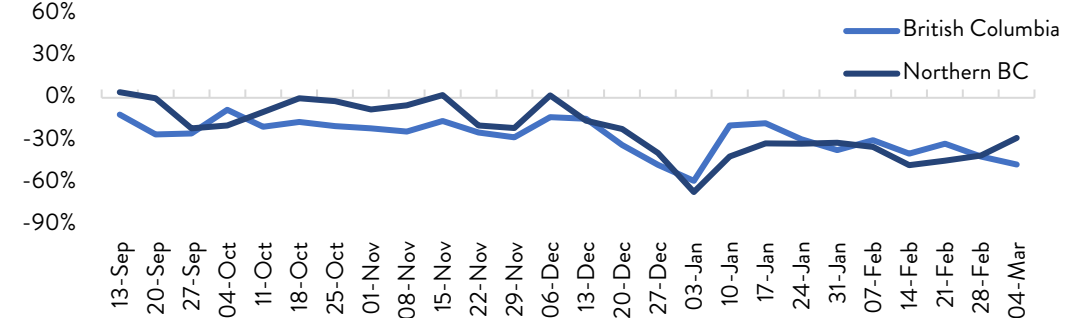
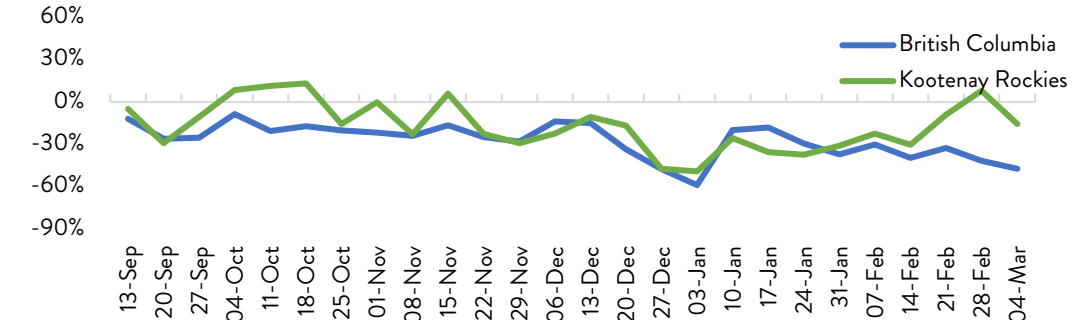
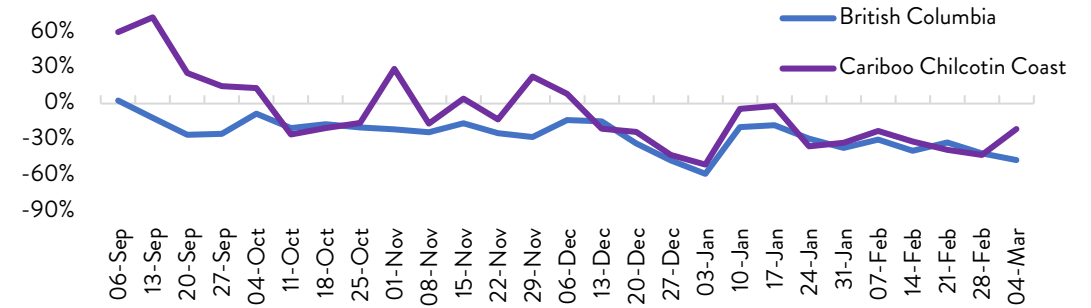
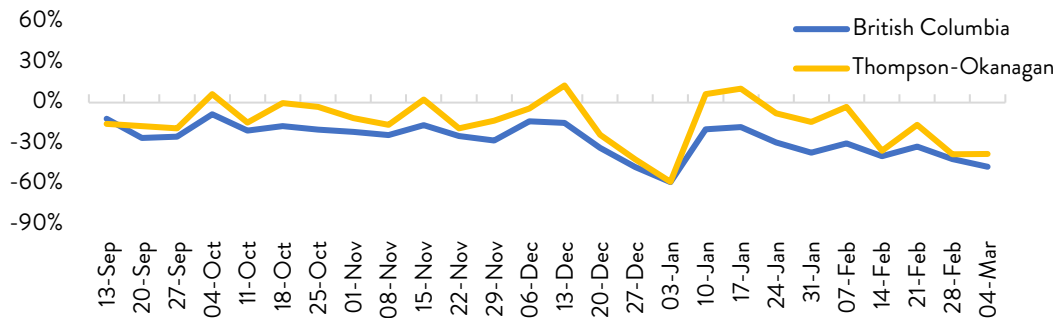
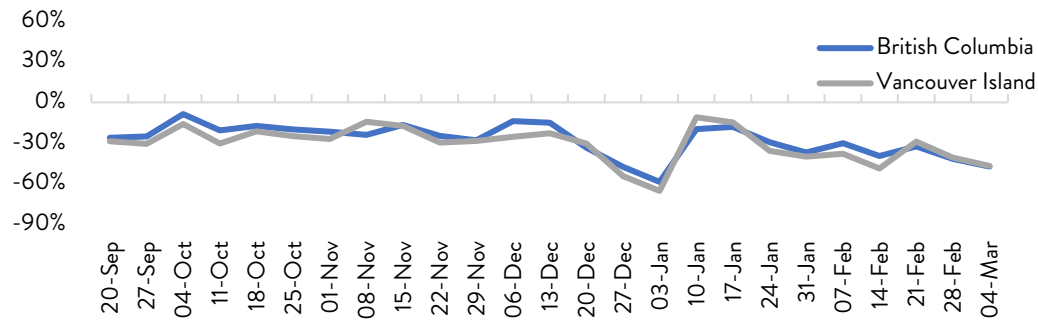
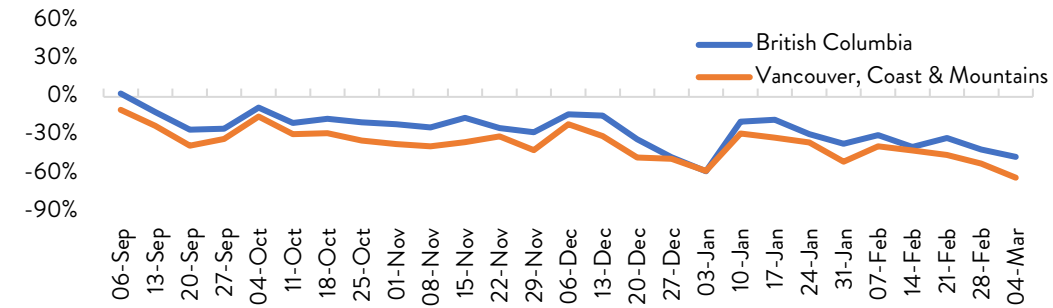
BC sees a decrease of -47.3% in weekly domestic overnight visitation compared to same period last year

- Environics Analytics also reports year-over-year analysis in the Weekly COVID Tracker Report.
- For the week ending March 4, 2021, weekly domestic overnight visitation was down -47.3% compared to the same week in 2020.
- A year-over-year decrease in weekly visitation was seen across the province in each tourism region:
 - Vancouver, Coast & Mountains (-63.7%)
 - Vancouver Island (-46.8%)
 - Thompson Okanagan (-37.8%)
 - Northern BC (-28.5%)
 - Cariboo Chilcotin Coast (-21.4%)
 - Kootenay Rockies (-15.4%)



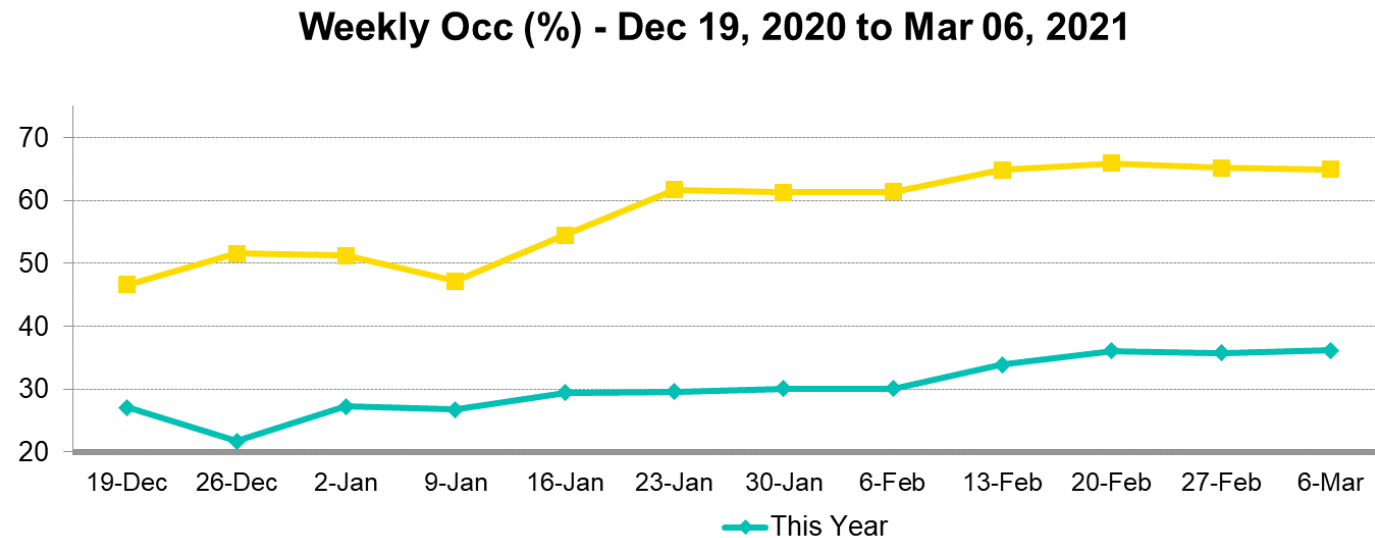
Source: [Environics Analytics Weekly COVID Tracker Report, March 4, 2021](#)

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



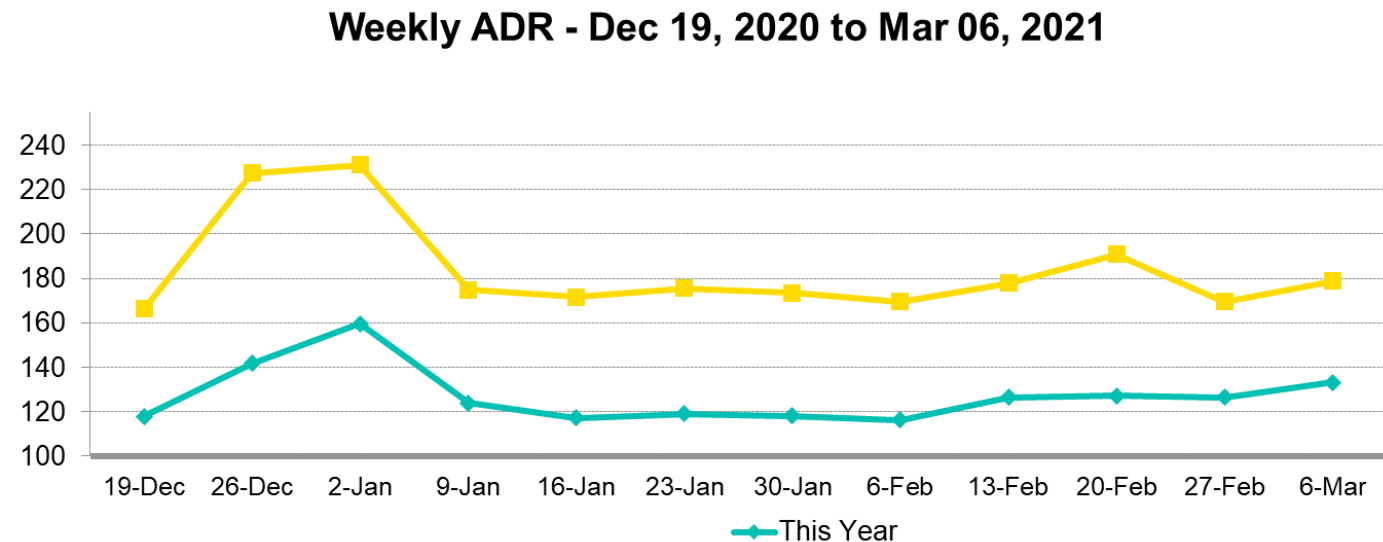
BC's occupancy rate (36.2%) up +0.5 points from the previous week

- STR, an agency which reports BC's hotel performance, shows the average weekly occupancy for BC was 36.2% for the week of February 28 – March 6, 2021. This represents an increase of +0.5 points from the previous week and a decrease of -28.8 points compared to a similar period in 2020.



BC's average daily rate (\$133.26) up +5.7% from the previous week

- STR, an agency which reports BC's hotel performance, shows BC's average daily rate (ADR) was \$133.26 for the week of February 28 – March 6, 2021. This represents an increase of +5.7% from the previous week and a decrease of -25.4% compared to a similar period in 2020.



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

	Feb. 28 - Mar. 6, 2021	Week-over-Week Feb. 28 - Mar. 6, 2021 vs. Feb. 21 - 27, 2021	Year-over-Year Feb. 28 - Mar. 6, 2021 vs. Mar. 1 - 7, 2020	Feb. 28 - Mar. 6, 2021	Week-over-Week Feb. 28 - Mar. 6, 2021 vs. Feb. 21 - 27, 2021	Year-over Year Feb. 28 - Mar. 6, 2021 vs. Mar. 1 - 7, 2020
	Occupancy Rate	Occupancy Point Change	Occupancy Point Change	ADR	ADR Percent Change	ADR Percent Change
British Columbia	36.2%	+0.5	-28.8	\$133.26	+5.7%	-25.4%
Vancouver (City of)	21.0%	-0.6	-53.8	\$150.87	+2.8%	-34.3%
Whistler	27.4%	+1.4	-50.4	\$279.16	+5.8%	-32.3%
Victoria	33.4%	+2.0	-33.5	\$116.72	-1.8%	-19.6%
Kelowna	29.1%	+1.5	-27.7	\$105.11	+0.3%	-19.6%
Kamloops	40.5%	+2.9	-8.0	\$89.91	+0.0%	-14.6%
Richmond	55.3%	+8.0	-19.7	\$195.41	+25.6%	+20.6%



BC's revenue per available room (RevPAR) (\$48.24) up +7.1% from the previous week

- STR, an agency which reports BC's hotel performance, shows BC's revenue per available room (RevPAR) was \$48.24 for the week of February 28 – March 6, 2021. This represents an increase of +7.1% from the previous week and a decrease of -58.5% compared to a similar period in 2020.

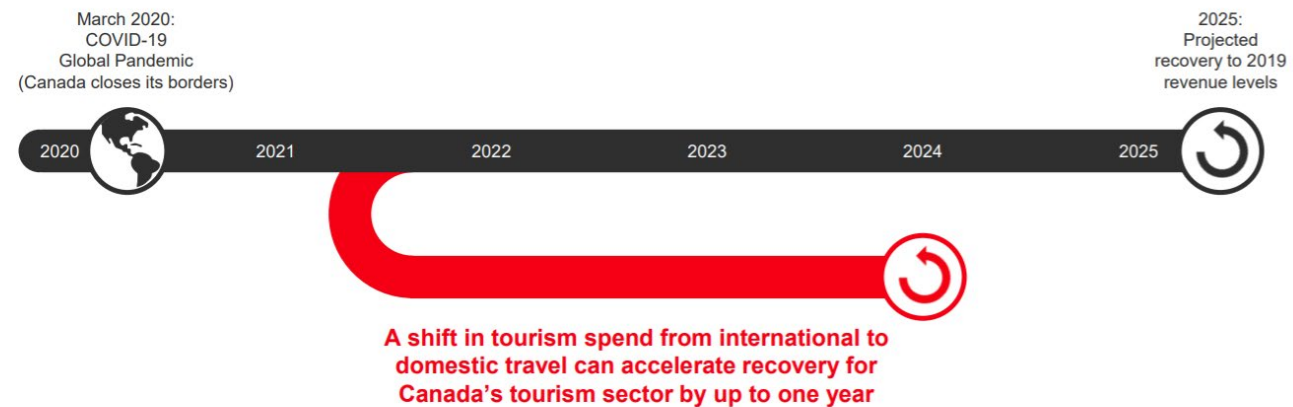
	Feb. 28 - Mar. 6, 2021	Week-over-Week Feb. 28 - Mar. 6, 2021 vs. Feb. 21 - 27, 2021	Year-over-Year Feb. 28 - Mar. 6, 2021 vs. Mar. 1 - 7, 2020
	RevPAR	RevPAR Percent Change	RevPAR Percent Change
British Columbia	\$48.24	+7.1%	-58.5%
Vancouver (City of)	\$31.63	-0.1%	-81.6%
Whistler	\$76.39	+11.4%	-76.2%
Victoria	\$38.97	+4.6%	-59.9%
Kelowna	\$30.55	+5.8%	-58.8%
Kamloops	\$36.43	+7.8%	-28.7%
Richmond	\$108.00	+46.7%	-11.1%



A shift to Canadian domestic tourism could accelerate tourism revenue recovery by a year according to Destination Canada

- A report by Destination Canada showcasing Canada's visitor economy after a year of the pandemic showed that tourism revenue is projected to reach 2019 levels by 2025. A shift to domestic travel could accelerate this recovery by a year.
- 80% of Canadians plan to travel when restrictions relax. 84% of Canadians believe that the tourism sector is very or somewhat important and 82% believe Canadian visitors travelling domestically is good for Canada.

Recovery is forecasted to take years, but a significant increase in domestic travel can accelerate recovery

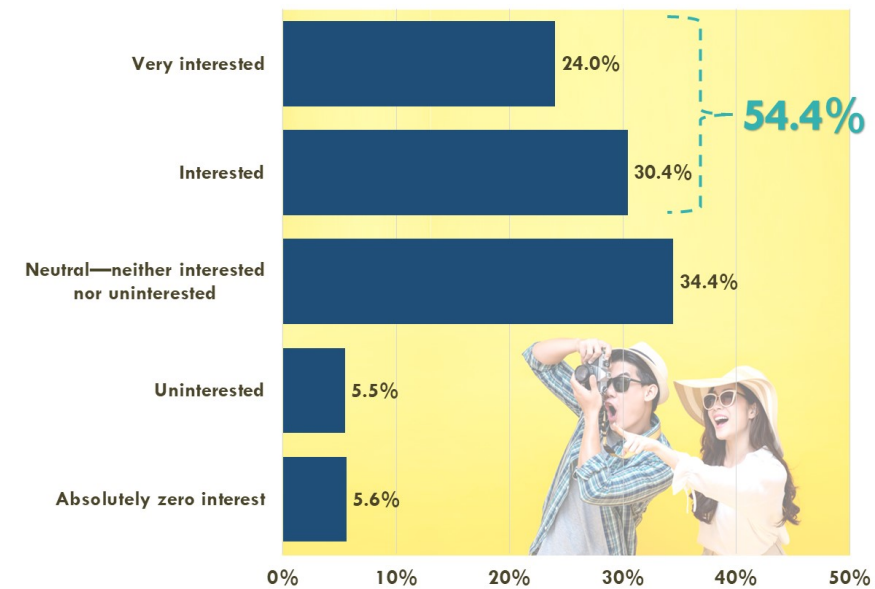


Source: [Revisiting Tourism, Destination Canada, March 2021](#)

54.4% of American travellers are interested in using a Visitor Information Center in 2021

- Destination Analysts, a US-based tourism research company, shared that 54.4% of American travellers are interested in using a Visitor Information Center in 2021. Of these, 24.0% said they are very interested.
- These travellers largely want recommendations from staff and physical brochures while using pandemic principles, such as masking and distancing.
- 45.3% of American travellers say they have used a Visitor Information Center on a trip in the last 5 years.

INTEREST IN USING VISITOR INFORMATION CENTERS THIS YEAR AS OF MARCH 7, 2021



QUESTION: HOW INTERESTED WOULD YOU BE IN USING A VISITOR INFORMATION CENTER ON ANY OF YOUR DOMESTIC TRIPS IN THIS YEAR?

(Base: Wave 52 data. All respondents, 1,209 completed surveys.
Data collected March 5-7, 2021)

Destination Analysts
DO YOUR RESEARCH



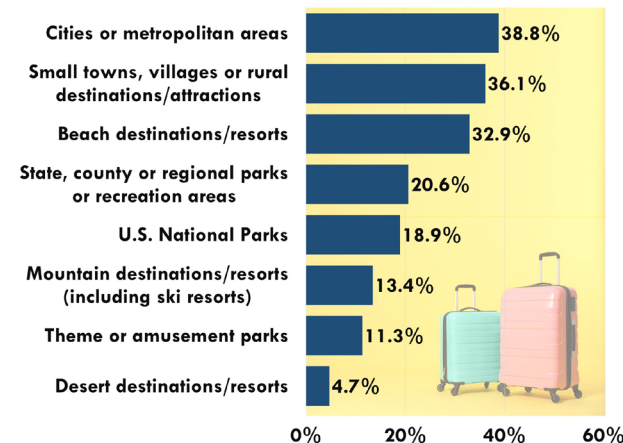
Source: [Destination Analysts, March 7, 2021](#)

38.8% of American travellers intend to visit an urban area in the next 3 months

- Destination Analysts, a US-based tourism research company, shared that 38.8% of American travellers say that they will visit a city or metropolitan area in the next three months, ahead of small towns, villages, or rural destinations/attractions (36.1%), and beach destinations/resorts (32.9%).

TRACKING URBAN TOURISM RECOVERY AS OF MARCH 7, 2021

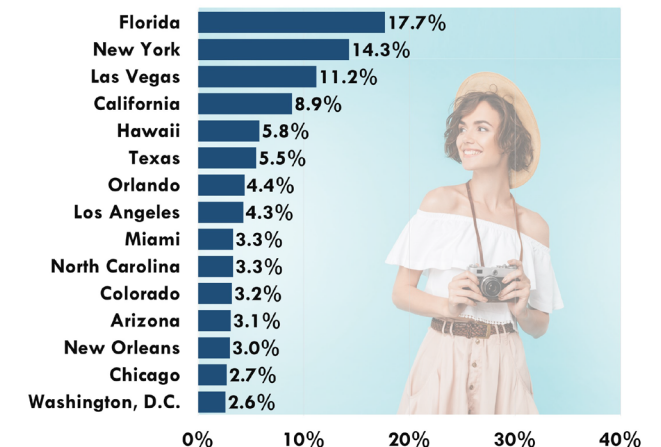
DESTINATION TYPES AMERICANS WILL VISIT IN NEXT THREE MONTHS



QUESTION: ON THESE LEISURE TRIPS, WHICH OF THE FOLLOWING ARE YOU EXPECTING TO VISIT?

(Base: Wave 52 data. Respondents who expect to take a leisure trip during the next three months, 712 completed surveys. Data collected March 5-7, 2021)

MOST DESIRED DOMESTIC DESTINATIONS THIS YEAR



QUESTION: WHICH DOMESTIC DESTINATIONS DO YOU MOST WANT TO VISIT THIS UPCOMING YEAR? (WRITE IN UP TO THREE)

(Base: Wave 52 data. All respondents, 1,206 completed surveys. Data collected March 5-7, 2021)



Top COVID-19 impacts on travel plans for Americans are reducing number of trips and choosing drive destinations

- In Longwoods International Travel Sentiment Study Wave 32 (March 9, 2021) report, over the next six months, 32% of Americans stated they will reduce the number of trips they take, 32% will choose destinations they can drive to as opposed to fly, and 26% will travel within the US instead of internationally.

IMPACT ON TRAVEL PLANS

Influence of COVID-19 on Travel Plans in the Next Six Months



Travel Sentiment Study Wave 32

Longwoods | miles
INTERNATIONAL PARTNERSHIP

Source: [Longwoods International Travel Sentiment Study Wave 32, March 9, 2021](#)



UNWTO reports 32% of destinations worldwide are closed to international tourism

- The UNWTO Travel Restrictions Report, which provides a comprehensive regulations overview in 217 destinations worldwide, shows that “the persistent seriousness of the epidemiological situation has caused governments to adopt a more cautious approach.”
- As of early February, 32% of worldwide destinations (69 destinations) are completely closed for international tourism. 38 of these destinations have been closed for at least 40 weeks.
- 34% of destinations worldwide are partially closed to international tourists.



Source: [UNWTO, March 8, 2021](#)

Skift shares 10 travel and tourism learnings after a year of the pandemic

With the 1st anniversary of the pandemic on March 11, a recent article by Skift outlined 10 learnings for travel and tourism:

1. The world must be prepared for future pandemics
2. Vaccines are necessary and should be coupled with other tools, such as a vaccine passport
3. Islands will likely be the preliminary tourism hotspots
4. With differing outgoing travel bans, key markets must be re-examined
5. Domestic travel should be nurtured
6. The meaning of travel is being rethought
7. The economic situations of markets must be considered
8. Some consumers are seeking ancillary offerings, such as Emirates selling spare seats based on customer feedback
9. Contact-free travel is now widely considered
10. People expect sustainability



Source: [Skift, March 9, 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.





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

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