

# COVID-19 Research Roundup

April 5, 2021

Horsefly, 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, February 5, and March 29.

On March 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 April 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.

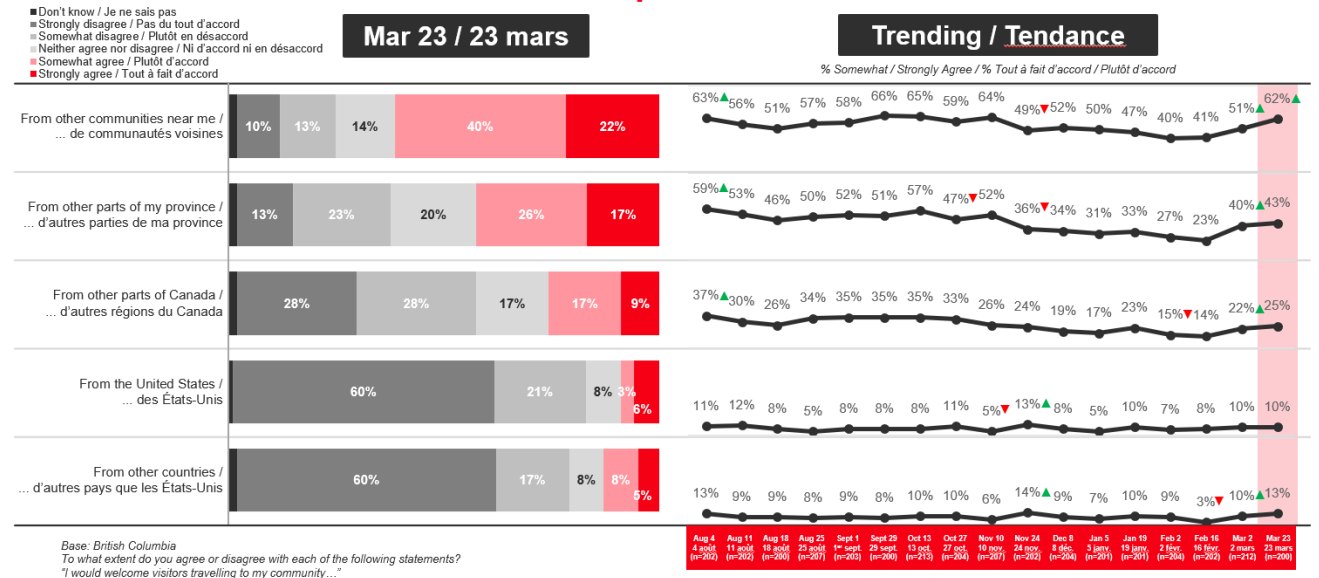
Last week in brief:

- 62% of BC residents would welcome visitors from nearby communities
- 84% of BC residents said they would visit a provincial park
- BC sees a decrease of -2.7% in weekly domestic overnight visitation compared to previous week
- BC's occupancy rate (46.3%) up +2.3 points from the previous week
- BC's average daily rate (\$138.24) down -1.3% from the previous week
- BC's revenue per available room (RevPAR) (\$63.08) up +4.0% from the previous week
- Statistics Canada reports 2020 tourism spending down -48.1% in Canada
- Expedia Group reports 32% of Canadian travellers are confident to travel
- Destination Analysts reports 67% of American travellers intend to travel for leisure in the next 3 months
- Skift research shows 37% of US trips taken by Americans during the pandemic in 2020 were for visiting friends and relatives
- McKinsey reports six fundamental shifts to American consumer behaviour during COVID-19
- Megan Epler Wood shares conclusions from an international expert discussion on sustainable tourism governance
- The UNWTO announced an -87% drop in International Tourist Arrivals for January 2021
- Tourism and COVID-19 dashboard and reporting resources

# 62% of BC residents would welcome visitors from nearby communities

- In Destination Canada's latest Resident Sentiment report (March 23, 2021), 62% of BC residents stated they would welcome visitors from nearby communities, whereas 23% expressed an opposing view, stating they would not welcome those visitors, resulting in a net score of +39.
- 43% of BC residents stated they would welcome visitors from other parts of the province, compared to 36% who would not, resulting in a net score of +7.
- BC residents have a net score of -31 for welcoming visitors from other provinces, -71 for welcoming visitors from the US, and -64 for travelling to other countries.
- Destination Canada is now releasing this survey on a bi-weekly cadence.

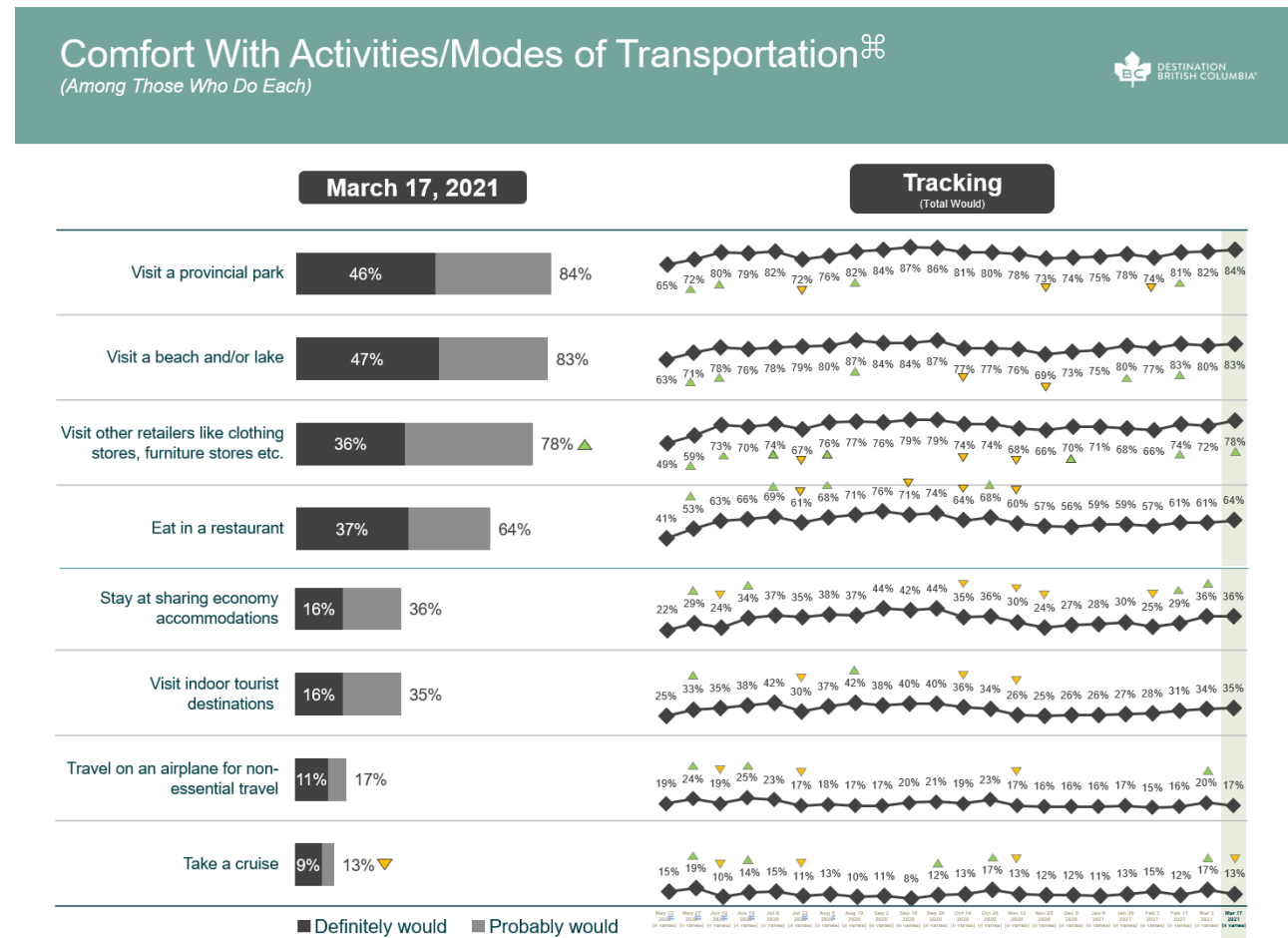
## British Columbia / Colombie-Britannique Level of Welcome Towards Visitors / Opinion envers l'accueil de visiteurs



Source: [Destination Canada's Weekly Resident Sentiment, Leger, March 23, 2021](#)

# 84% of BC residents said they would visit a provincial park

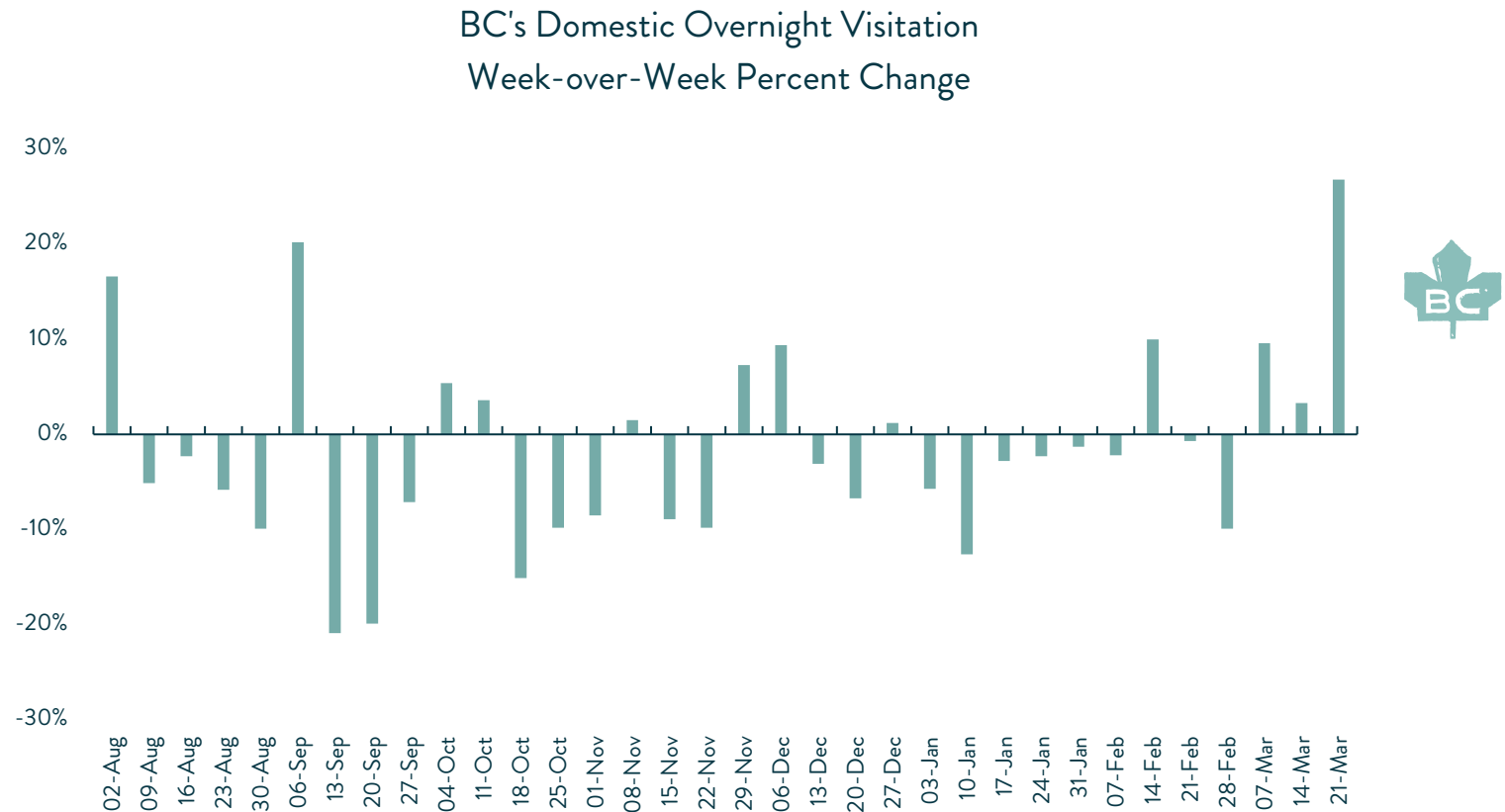
- In Destination BC's BC Residents' Public Perceptions Wave 22 (March 17, 2021) report, 84% of BC residents said they would visit a provincial park and 83% said they would visit a beach and/or lake.
- Please note that Wave 22 of this survey was launched prior to the latest announcement by BC's Provincial Health Officer, Dr Bonnie Henry on March 29 and BC residents' comfort in participating in various activities may have changed since.



Source: [Destination BC's BC Residents' Public Perceptions: COVID-19 Travel and Tourism Wave 22, Insights West, March 17, 2021](#)

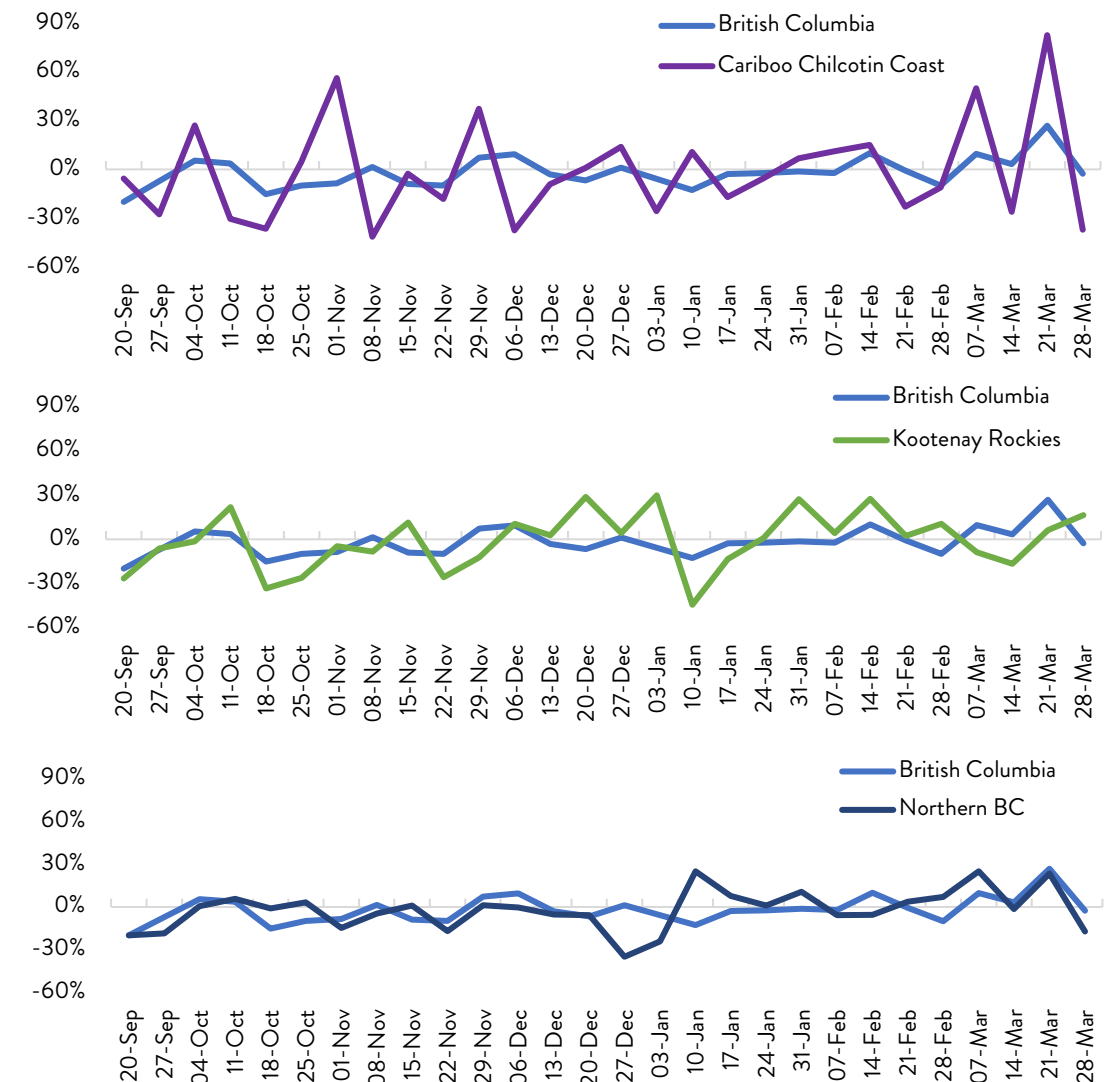
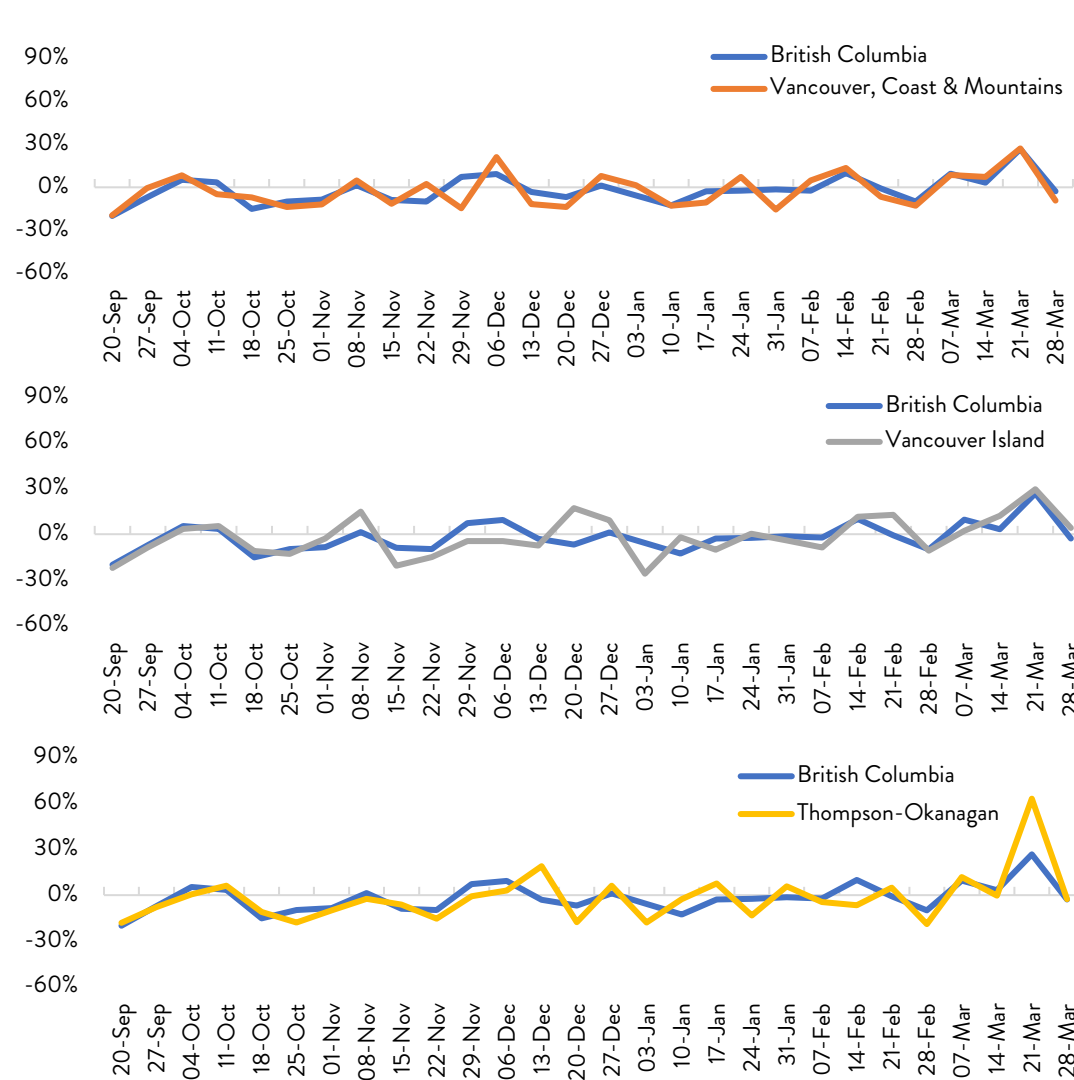
## *BC sees a decrease of -2.7% in weekly domestic overnight visitation compared to previous week*

- According to Environics Analytics Weekly COVID Tracker Report, during the week ending March 28, 2021, BC experienced a week-over-week decrease of -2.7% in weekly domestic overnight visitation.
- Week-over-week decreases in domestic overnight visitation were seen across the province in four tourism regions:
  - Cariboo Chilcotin Coast (-37.0%)
  - Northern BC (-17.1%)
  - Vancouver, Coast & Mountains (-9.3%)
  - Thompson Okanagan (-2.6%)
- However, week-over-week increases in domestic overnight visitation were seen in the remaining two tourism regions:
  - Kootenay Rockies (+16.4%)
  - Vancouver Island (+4.2%)



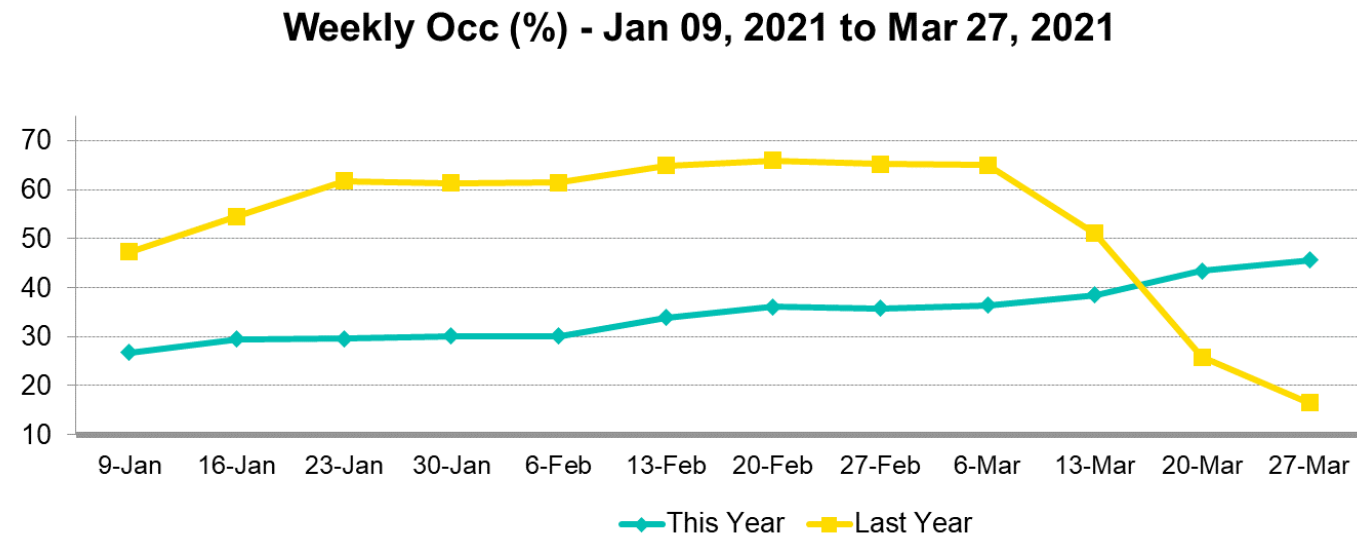
Source: [Environics Analytics Weekly COVID Tracker Report, March 28, 2021](#)

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



## *BC's occupancy rate (46.3%) up +2.3 points from the previous week*

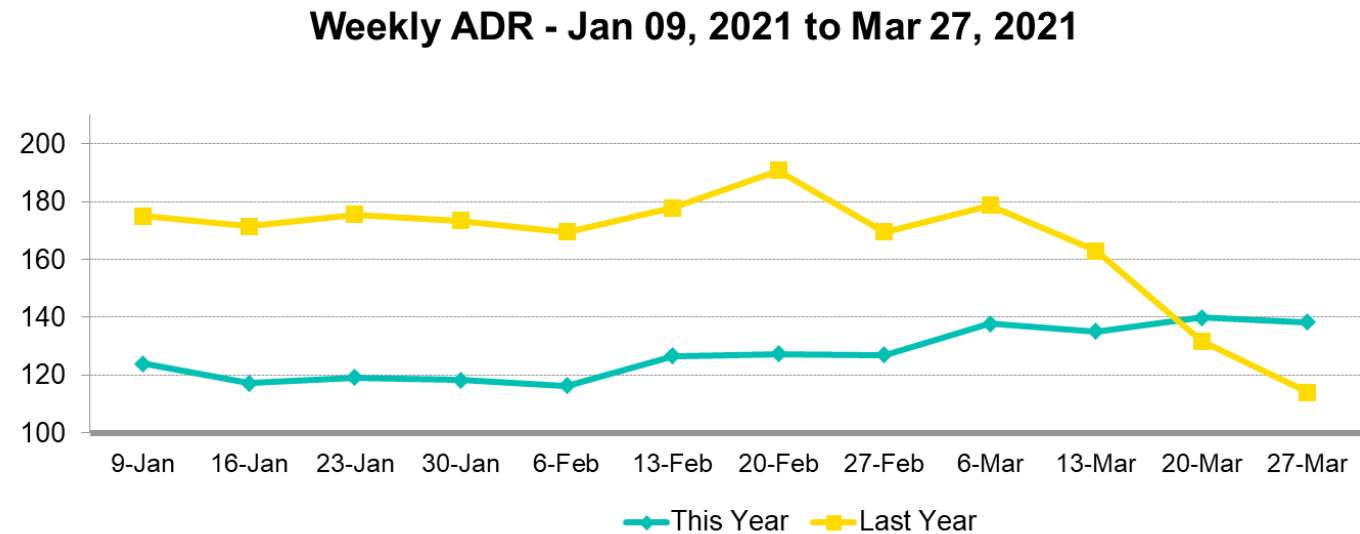
- STR, an agency which reports BC's hotel performance, shows the average weekly occupancy for BC was 45.6% for the week of March 21 – March 27, 2021. This represents an increase of +2.3 points from the previous week and an increase of +29.1 points compared to a similar period in 2020.





## *BC's average daily rate (\$138.24) down -1.3% from the previous week*

- STR, an agency which reports BC's hotel performance, shows BC's average daily rate (ADR) was \$138.24 for the week of March 21 – March 27, 2021. This represents a decrease of -1.3% from the previous week and an increase of +21.3% compared to a similar period in 2020.



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

	Mar. 21 - 27, 2021	Week-over-Week Mar. 21 - 27, 2021 vs. Mar. 14 - 20, 2021	Year-over-Year Mar. 21 - 27, 2021 vs. Mar. 22 - 28, 2020	Mar. 21 - 27, 2021	Week-over-Week Mar. 21 - 27, 2021 vs. Mar. 14 - 20, 2021	Year-over Year Mar. 21 - 27, 2021 vs. Mar. 22 - 28, 2020
	Occupancy Rate	Occupancy Point Change	Occupancy Point Change	ADR	ADR Percent Change	ADR Percent Change
<b>British Columbia</b>	<b>45.6%</b>	<b>+2.3</b>	<b>+29.1</b>	<b>\$138.24</b>	<b>-1.3%</b>	<b>+21.3%</b>
Vancouver (City of)	30.7%	+3.6	+22.9	\$171.94	+0.3%	+25.4%
Whistler	39.2%	-4.4	+37.5	\$271.09	-1.1%	+61.4%
Victoria	52.4%	+9.5	+40.4	\$127.34	-2.9%	+34.2%
Kelowna	41.9%	+4.5	+30.7	\$109.03	+1.3%	+6.5%
Kamloops	59.6%	+4.7	+43.9	\$93.85	+0.6%	+4.4%
Richmond	59.8%	-1.6	+27.3	\$189.17	+1.2%	+32.3%
Revelstoke	44.2%	-4.4	+34.4	\$150.30	-4.9%	+52.0%



## *BC's revenue per available room (RevPAR) (\$63.08) up +4.0% from the previous week*

- STR, an agency which reports BC's hotel performance, shows BC's revenue per available room (RevPAR) was \$63.08 for the week of March 21 – March 27, 2021. This represents an increase of +4.0% from the previous week.
- BC's RevPAR showed an increase (+235.8%) for the week of March 21 – March 27, 2021 compared to a similar period in 2020. RevPAR substantially increased for all reported cities compared to a similar period in 2020 as well.

	Mar. 21 - 27, 2021 RevPAR	Week-over-Week Mar. 21 - 27, 2021 vs. Mar. 14 - 20, 2021 RevPAR Percent Change
<b>British Columbia</b>	<b>\$63.08</b>	<b>+4.0%</b>
Vancouver (City of)	\$52.83	+13.6%
Whistler	\$106.16	-11.1%
Victoria	\$66.74	+18.6%
Kelowna	\$45.71	+13.5%
Kamloops	\$55.97	+9.2%
Richmond	\$113.21	-1.5%
Revelstoke	\$66.42	-13.5%

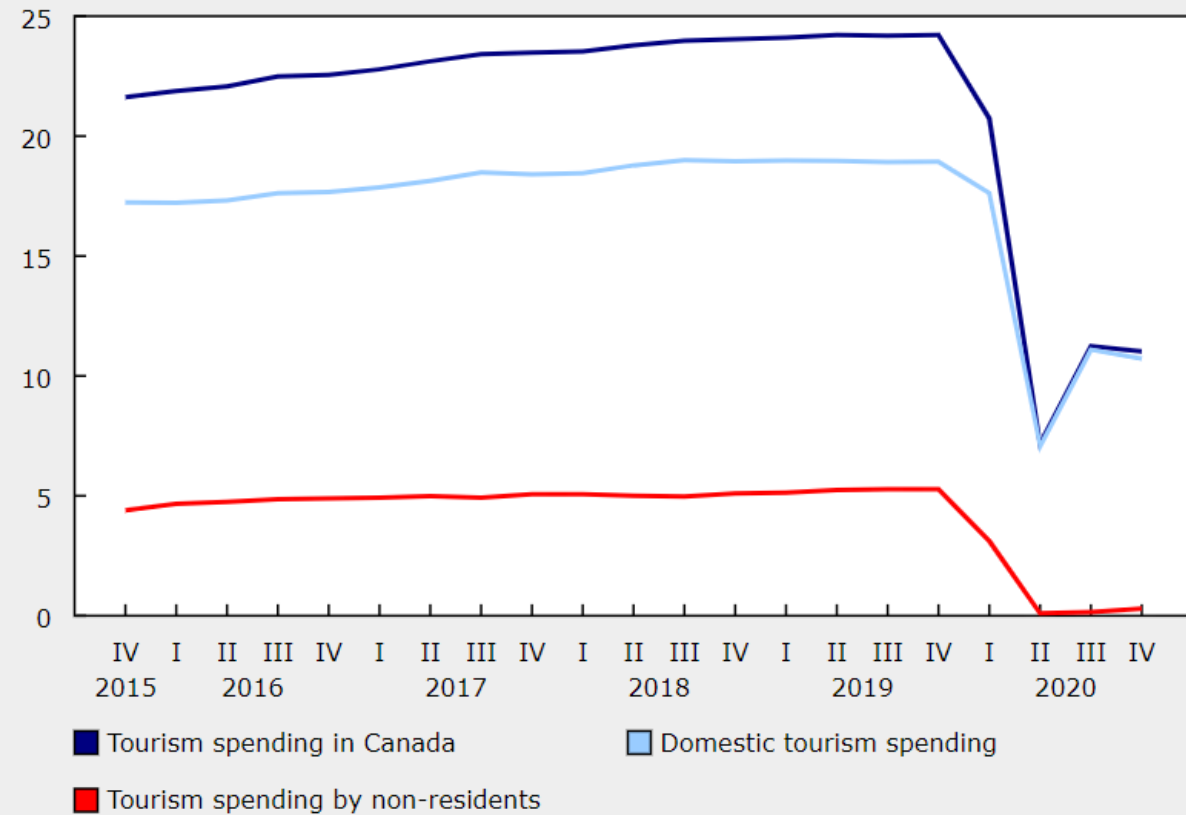
Source: [2021 STR, STR Global Ltd - STR Mar. 21 – Mar. 27, 2021](#)



## *Statistics Canada reports 2020 tourism spending down -48.1% in Canada*

- The latest data from Statistics Canada showed tourism spending was down -48.1% in 2020. Tourism gross domestic product (GDP) decreased -3.3% in the fourth quarter and was down -47.9% annually.
- Tourism spending in Canada was \$11 billion in the fourth quarter of 2020, down -2.0% from the previous quarter and accounts for 0.9% of the country's GDP. Domestic spending accounted for \$10.7 billion of the fourth quarter.

billions of 2012 constant dollars



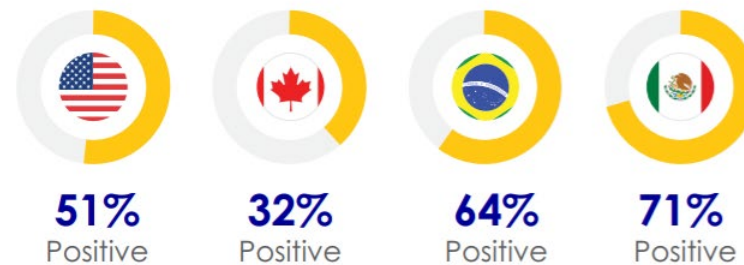
Source: [Statistics Canada, March 31, 2021](#)



# Expedia Group reports 32% of Canadian travellers are confident to travel

- An Expedia Group survey of 11,000 North and Latin American travellers showed that traveller confidence varies by country, from 32% positive in Canada to 71% positive in Mexico.
- North American travellers generally plan to take 2.7 leisure trips in 2021. Compared to Latin American, North American travellers were less likely to gain confidence from widely available vaccines, flexible cancellations, and guidelines on cleaning.

## Traveler Confidence Varies by Country



## Estimated Leisure Trips

January-September 2021



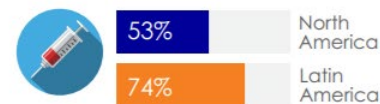
**2.1 Trips**  
North America

**2.7 Trips**  
Latin America

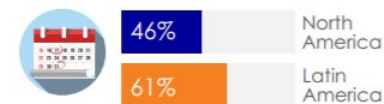


## What Instills Traveler Confidence?

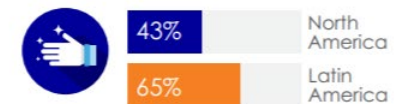
### Widely available vaccine



### Flexible cancellation



### Guidelines on cleaning



Source: [Expedia Group, 2021](#)

# *Destination Analysts reports 67.0% of American travellers intend to travel for leisure in the next 3 months*

- Destination Analysts, a US-based tourism research company, shared that 67.0% of American travellers intend to travel for leisure in the next 3 months.
- The mean number of trips respondents plan to take is 1.5 in the next 3 months.
- 41.3% plan to go to cities for their leisure trip, 35.1% to beaches/resorts, and 33.2% to rural areas.

## PERCENT OF AMERICANS WHO WILL TRAVEL FOR LEISURE IN THE NEXT 3 MONTHS

% WHO WILL TAKE AT LEAST 1 TRIP

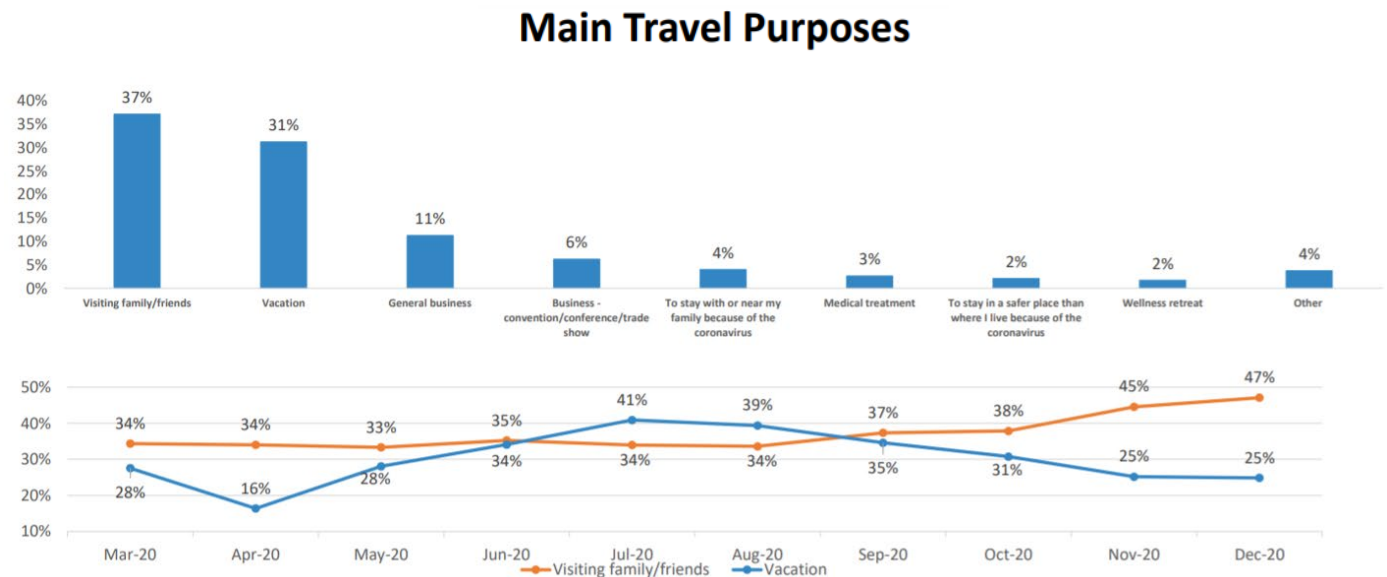


Source: [Destination Analysts, March 29, 2021](#)



# *Skift research shows 37% of US trips taken by American travellers during the pandemic in 2020 were for visiting friends & relatives*

- Recent research by Skift showed that 37% of trips taken in the United States by American travellers from March 2020 to December 2020 were for visiting friends and relatives, followed by 31% for vacation. Business travel only made up 17% of all trips taken in 2020.
- 29% of all personal trips from March to December were travelling with kids. Those travelling with kids were more likely to take a vacation than those travelling without kids.
- According to Skift, “Remote work and remote learning added a tremendous burden for parents with school-age kids. The need to get everyone out of the house often outweighed the risk for parents”.



Source: [Skift Research, 2021](#)

# *McKinsey reports six fundamental shifts to American consumer behaviour during COVID-19*



## **1. Steady overall optimism**

**~40%**  
of consumers are optimistic about an economic recovery post-COVID-19



## **2. Signs of spend recovery**

**51%**  
of consumers plan to splurge or treat themselves, some starting immediately and some waiting for COVID-19 to subside



## **3. Vaccination accelerating recovery**

**+50%**  
vaccinated consumers engaging in usual out-of-home activities vs. those interested in vaccination



## **4. Continued digital stickiness**

**+35%**  
January 2021 year-over-year online credit-card and debit-card penetration increase, as a % of total spend



## **5. Rebalancing of homebody economy**

**28%**  
of consumers have invested in new uses of their living space at home



## **6. Evolution of loyalty**

**39%**  
of consumers have tried new brands over the course of COVID-19





# *Megan Epler Wood releases conclusions from an international expert discussion on sustainable tourism governance and management*

- Megan Epler Wood released conclusions from a 2-hour discussion with thirty international experts in the field of sustainable tourism governance and management.
- Conclusions included:
  - COVID 19 has created opportunities for improving future tourism management.
  - Creation of interlinked governmental bodies which represent local, regional and national goals will be necessary.
  - Holistic measurements of tourism impacts are required.
  - Increased capacity and skills are required to manage tourism's complexity
  - Development of consistent policies to address social and environmental issues needed in order to engage local needs, coordinate effectively with civil society, and meet the requirements of the private sector.



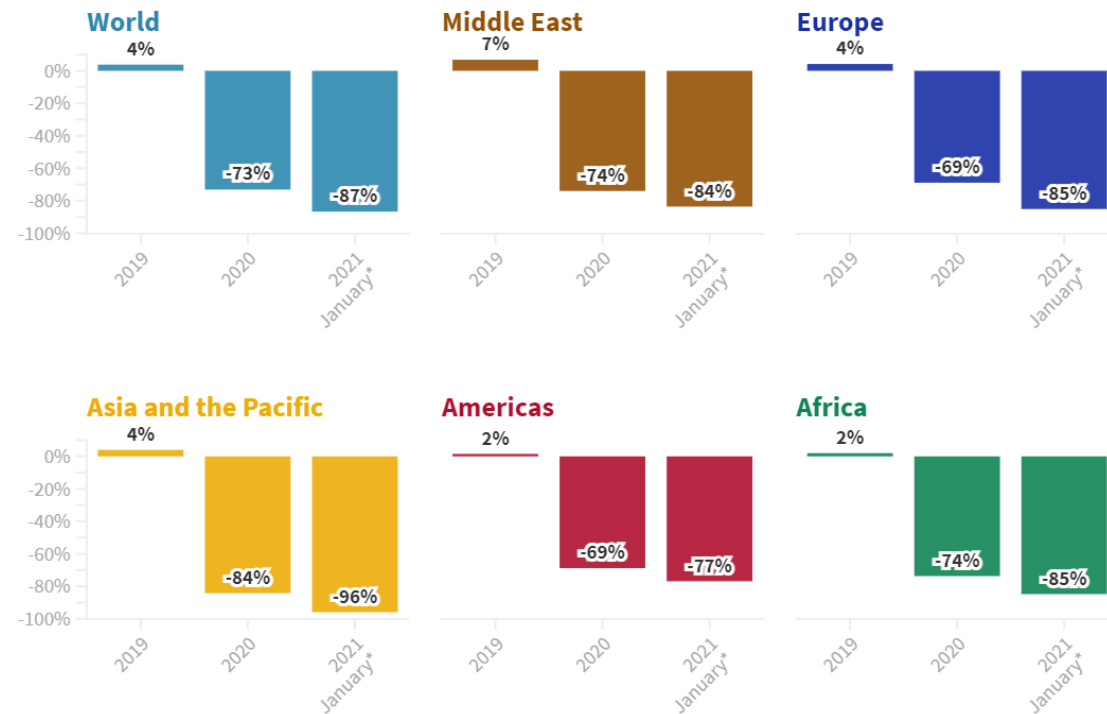
Source: [Megan Epler Wood, March 29, 2021](#)



# *The UNWTO announced an -87% drop in International Tourist Arrivals for January 2021*

- The latest data from the UNWTO showed that international tourist arrivals (ITAs) were down -87% globally in January, 14 points lower than the average for the year of 2020.
- ITAs were down -77% in January for the Americas compared to January 2020.

**Change %, International Tourist Arrivals**



Source: [UNWTO, March 31, 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 conducts and commissions 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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