

# COVID-19 Research Roundup

April 12, 2021



Kelowna, Thompson Okanagan

## *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:

- 80% of BC residents feel safe to travel to nearby communities
- 88% of BC residents intend to travel to nearby communities in the next 12 months
- BC sees an increase of +13% in weekly domestic overnight visitation compared to previous week
- BC sees an increase of +149.4% in weekly domestic overnight visitation compared to same period in 2020, and a decrease of -36.4% compared to 2019
- BC's occupancy rate (41.1%) down -4.6 points from the previous week
- BC's average daily rate (\$137.50) down -0.5% from the previous week
- BC's revenue per available room (RevPAR) (\$56.47) down -10.5% from the previous week
- Destination Analysts reports 77.7% of American travellers are dreaming of or planning a trip
- MMGY Global's recent survey of American travellers predicted a massive summer rebound for travel
- MMGY President stated consumers are eager to travel and will spend more time planning
- Amadeus shares that 91% of travellers would be comfortable using digital health passports to help restart travel
- Skift releases a series of good-news metrics as travel returns to the US
- Tourism and COVID-19 dashboard and reporting resources

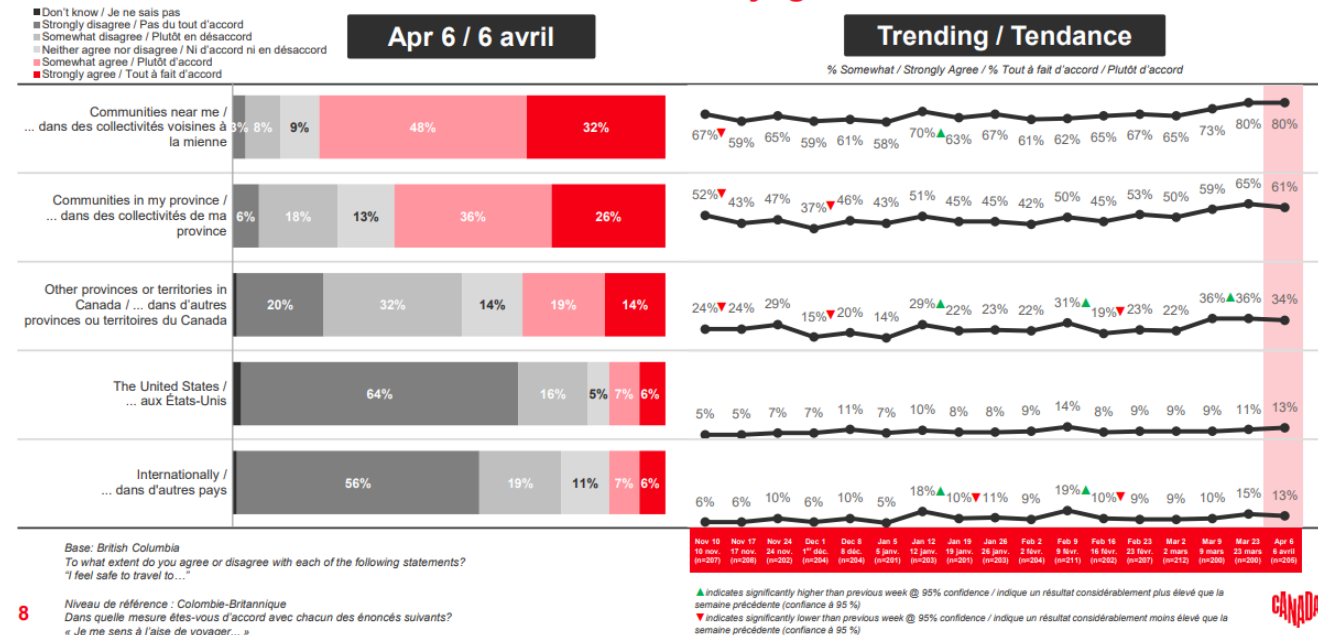


# 80% of BC residents feel safe to travel to nearby communities

- In Destination Canada's latest Resident Sentiment report (April 6, 2021), 80% of BC residents stated they would feel safe to travel to nearby communities, whereas 11% expressed an opposing view, stating they would not, resulting in a net score of +69.
- 61% of BC residents stated they would feel safe to travel to other parts of the province, compared to 24% who would not, resulting in a net score of +37.
- BC residents have a net score of -18 for feeling safe to travel to other provinces. In comparison, Alberta residents have a net score of -21 for feeling safe to travel to other provinces and Ontario residents have a net score of -9.

## British Columbia / Colombie-Britannique

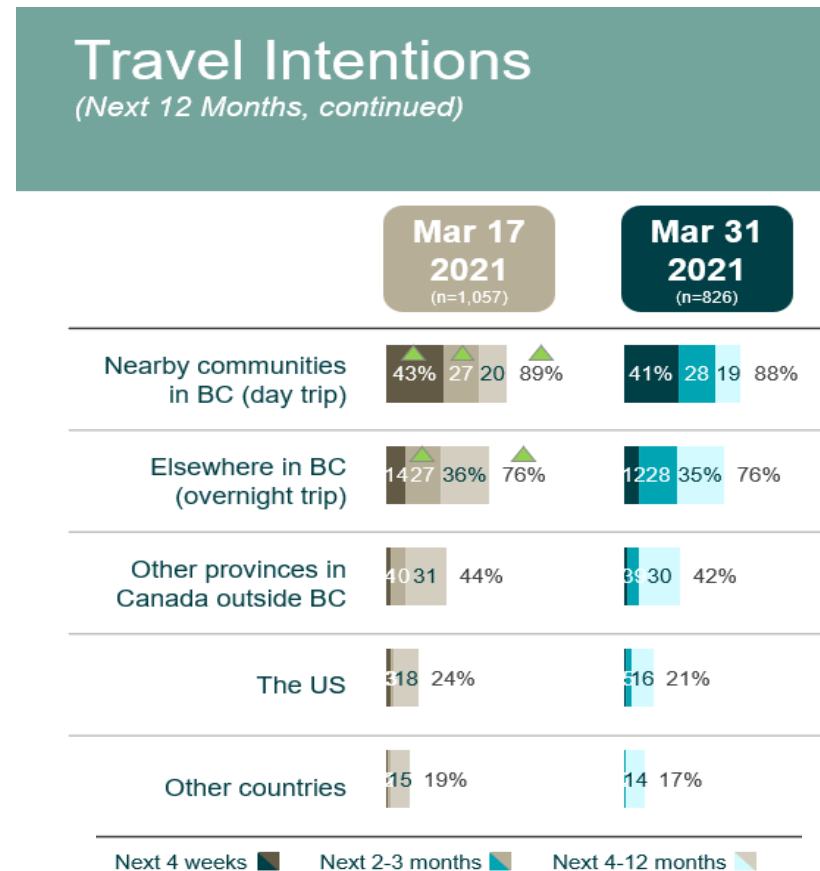
I feel safe to travel / Je me sens à l'aise de voyager



Source: [Destination Canada's Resident Sentiment, Leger, April 6, 2021](#)

# 88% of BC residents intend to travel to nearby communities in the next 12 months

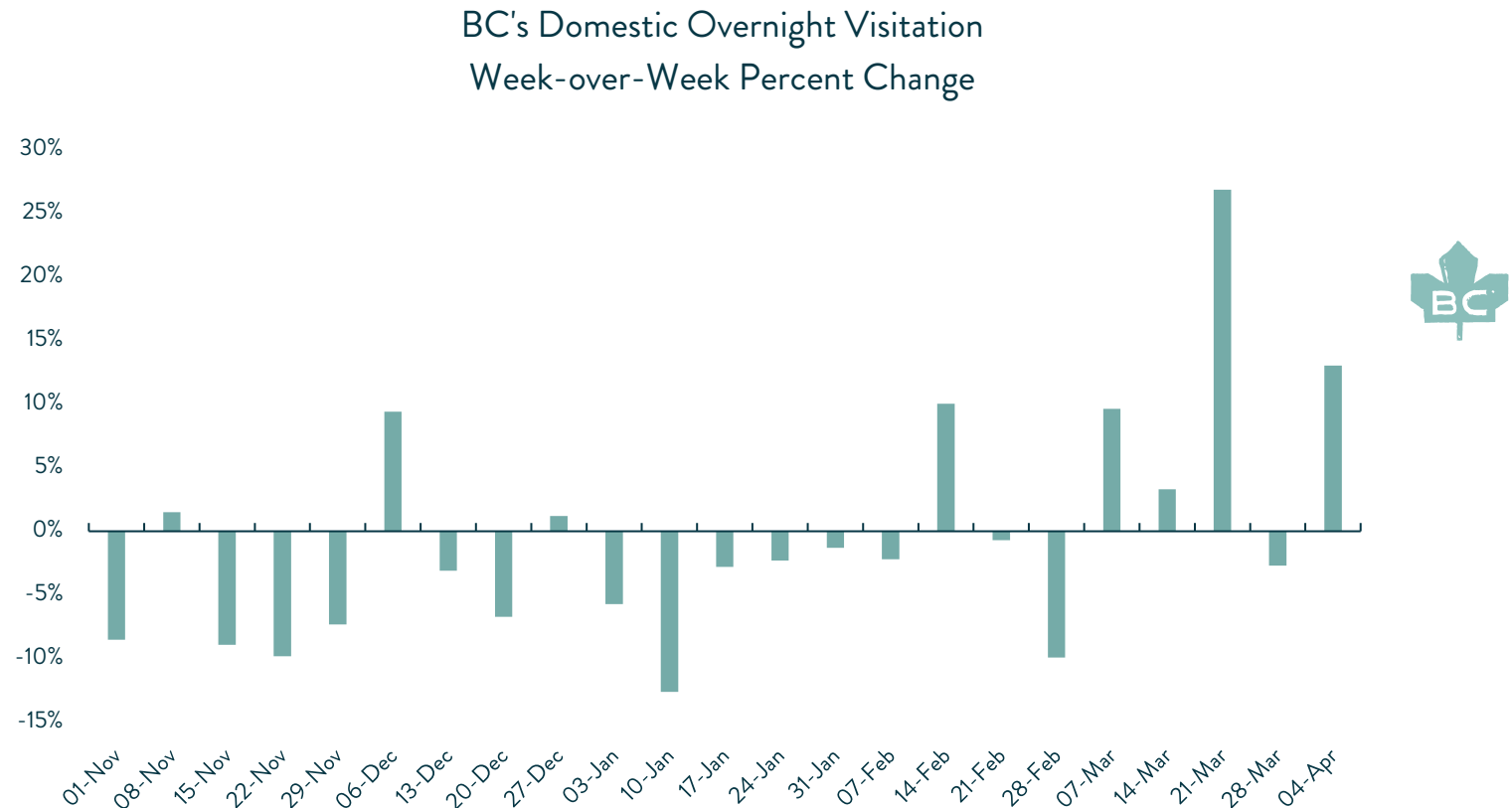
- In Destination BC's BC Residents' Public Perceptions Wave 23 (March 31, 2021) report, 88% of BC residents said they intend to travel to nearby communities in BC in the next 12 months. 76% said they intend to travel elsewhere in BC.
- 42% of BC residents intend to travel to other provinces outside BC in the next 12 months, 21% to the US, and 17% to other countries.
- Intentions to travel in the next 4 weeks, next 2-3 months or next 4-12 months remained the same compared to the previous week for all travel destinations.



Source: [Destination BC's BC Residents' Public Perceptions: COVID-19 Travel and Tourism Wave 23, Insights West, March 31, 2021](#)

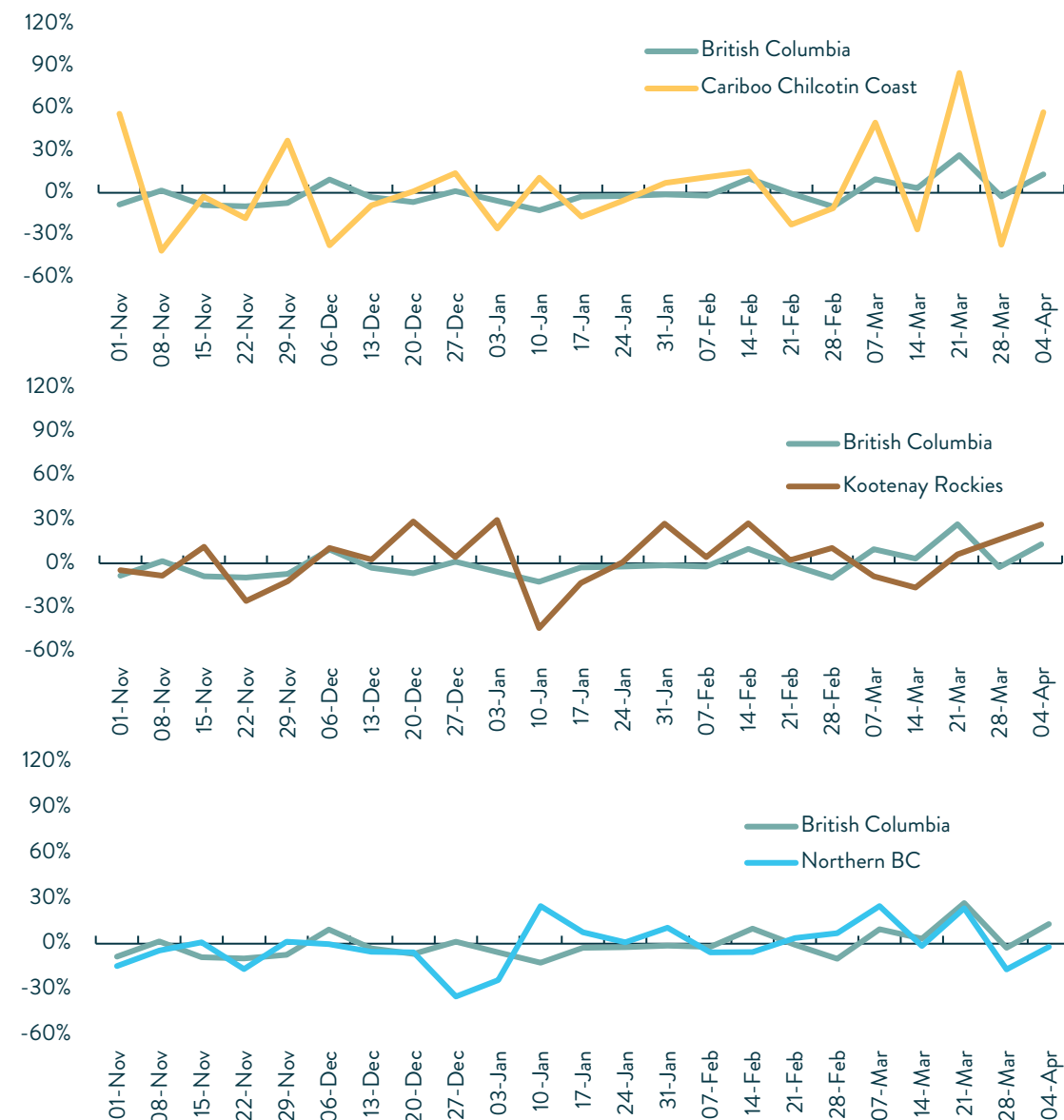
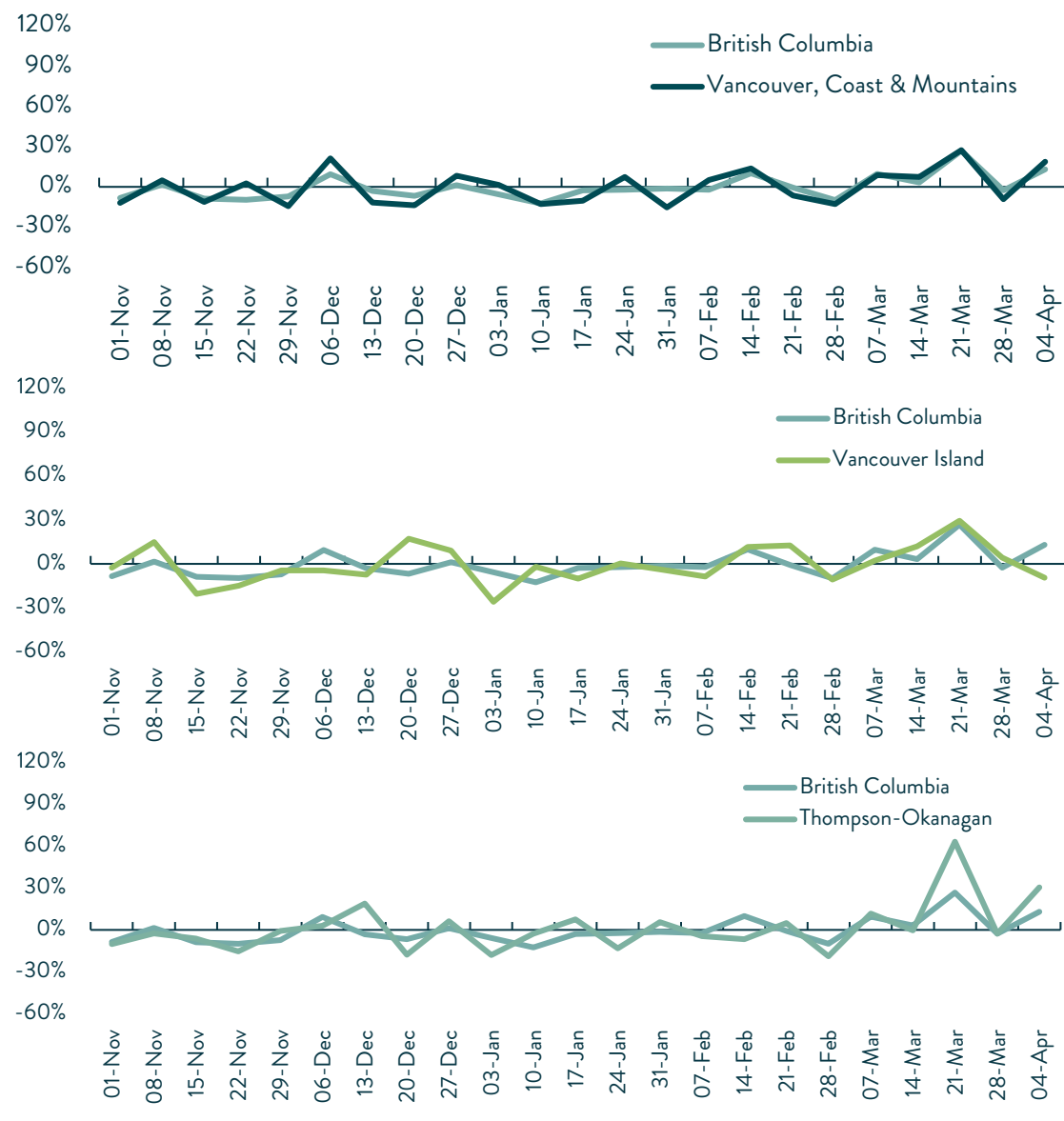
## *BC sees an increase of +13% in weekly domestic overnight visitation compared to previous week*

- According to Environics Analytics Weekly COVID Tracker Report, during the week ending April 4, 2021, BC experienced a week-over-week increase of +13.0% in weekly domestic overnight visitation.
- Week-over-week increases in domestic overnight visitation were seen across the province in four tourism regions:
  - Cariboo Chilcotin Coast (+57.3%)
  - Thompson Okanagan (+30.5%)
  - Kootenay Rockies (+26.5%)
  - Vancouver, Coast & Mountains (+18.7%)
- However, week-over-week decreases in domestic overnight visitation were seen in the remaining two tourism regions:
  - Vancouver Island (-9.5%)
  - Northern BC (-2.2%)



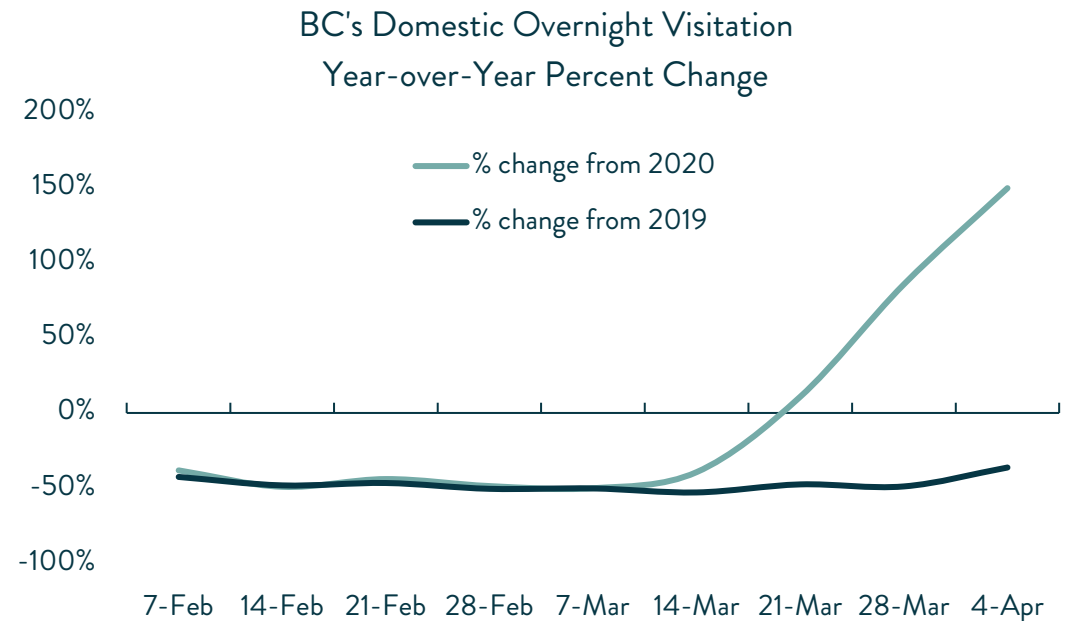
Source: [Environics Analytics Weekly COVID Tracker Report, April 4, 2021](#)

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



## *BC sees an increase of +149.4% in weekly domestic overnight visitation compared to same period in 2020, and a decrease of -36.4% compared to 2019*

- For the week ending April 4, 2021, Environics Analytics reported that weekly domestic overnight visitation is up +149.1% compared to the same week in 2020. Compared to the same week in 2019, weekly domestic overnight visitation was down -36.4%.
- The week ending April 4, 2021 captured the Easter weekend (April 4), which fell a week later in 2020 (April 12) and a further week later in 2019 (April 21). The increase in domestic overnight visitation seen for the week ending April 4 was partially due to the timing of Easter weekend compared to previous years.
- Across the province, year-over-year increases in weekly visitation were seen across BC compared to the same period in 2020, however, decreases continue to be seen for most tourism regions when compared to the same period in 2019.
  - Kootenay Rockies (+254.2% over 2020; +20.3% over 2019)
  - Thompson Okanagan (+244.0%; -10.4%)
  - Vancouver Island (+149.1%; -40.3%)
  - Vancouver, Coast & Mountains (+123.5%; -40.3%)
  - Cariboo Chilcotin Coast (+94.4%; -20.3%)
  - Northern BC (+77.2%; -38.7%)

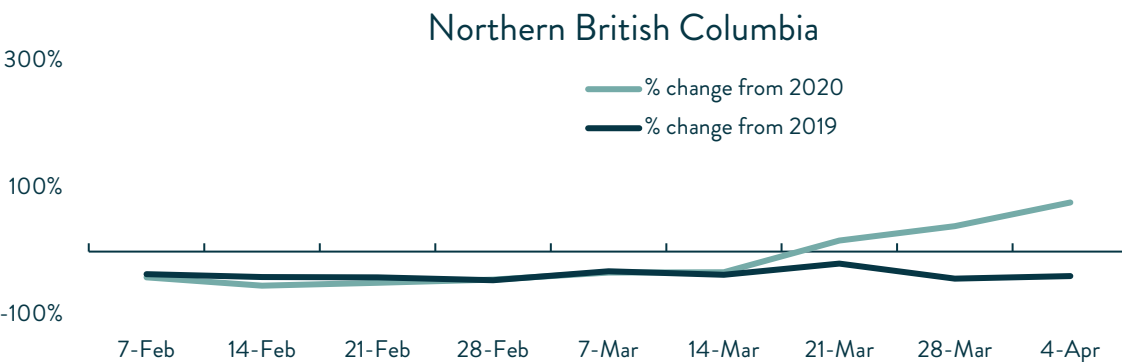
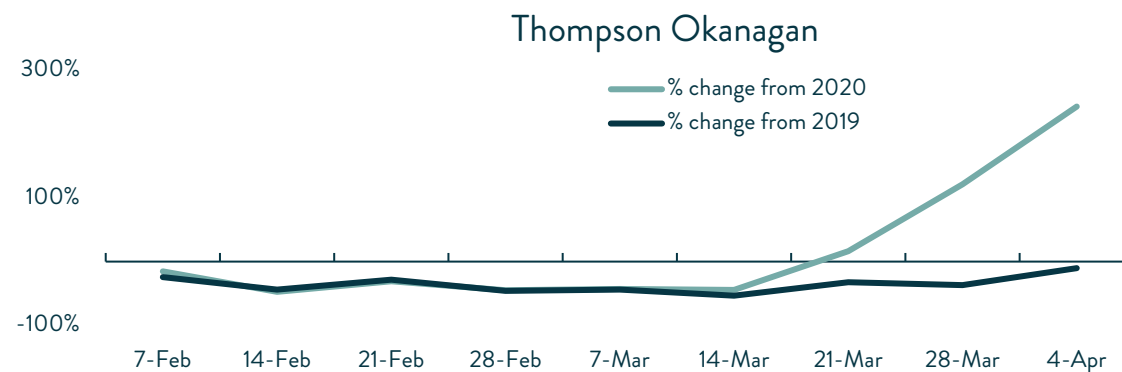
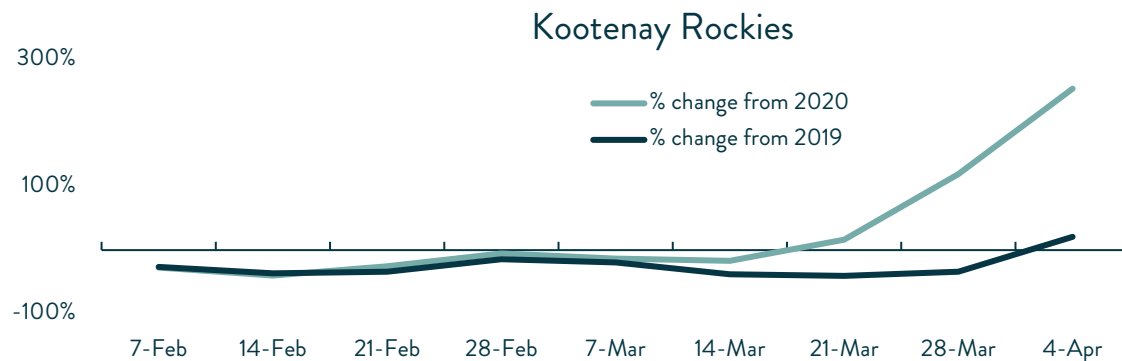
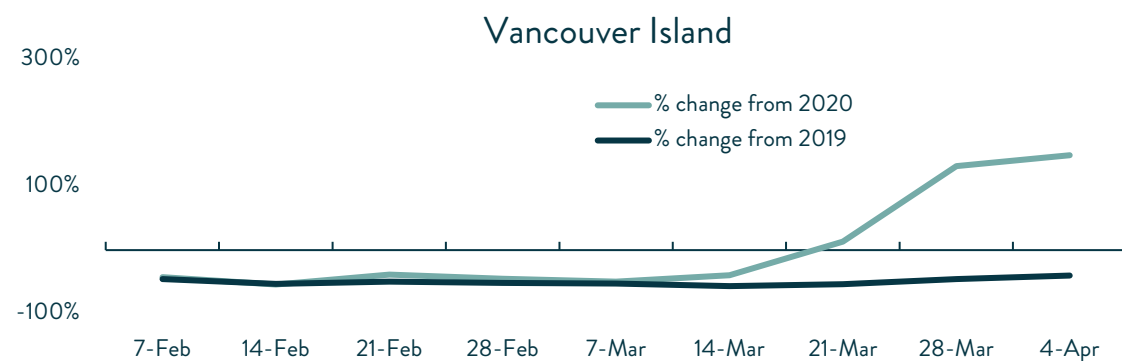
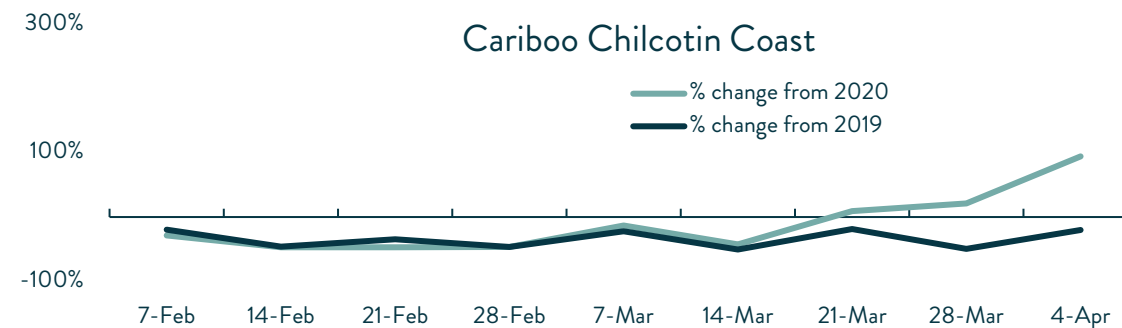
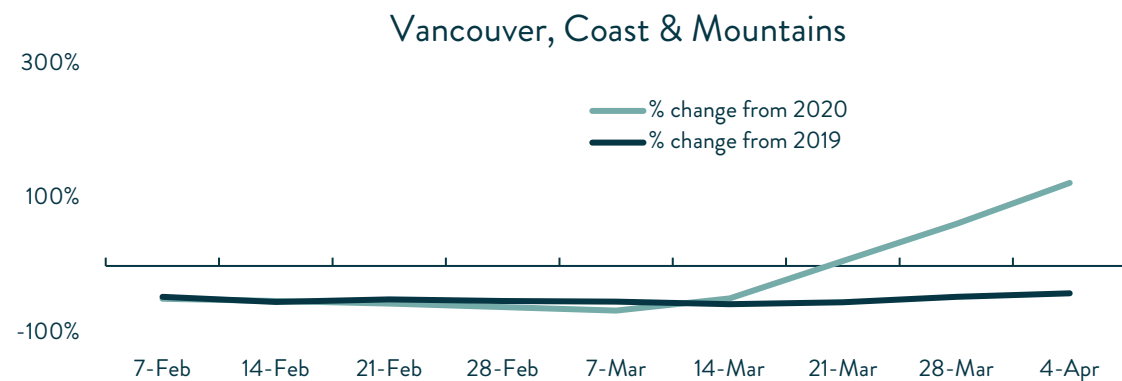


Source: [Environics Analytics Weekly COVID Tracker Report, April 4, 2021](#)



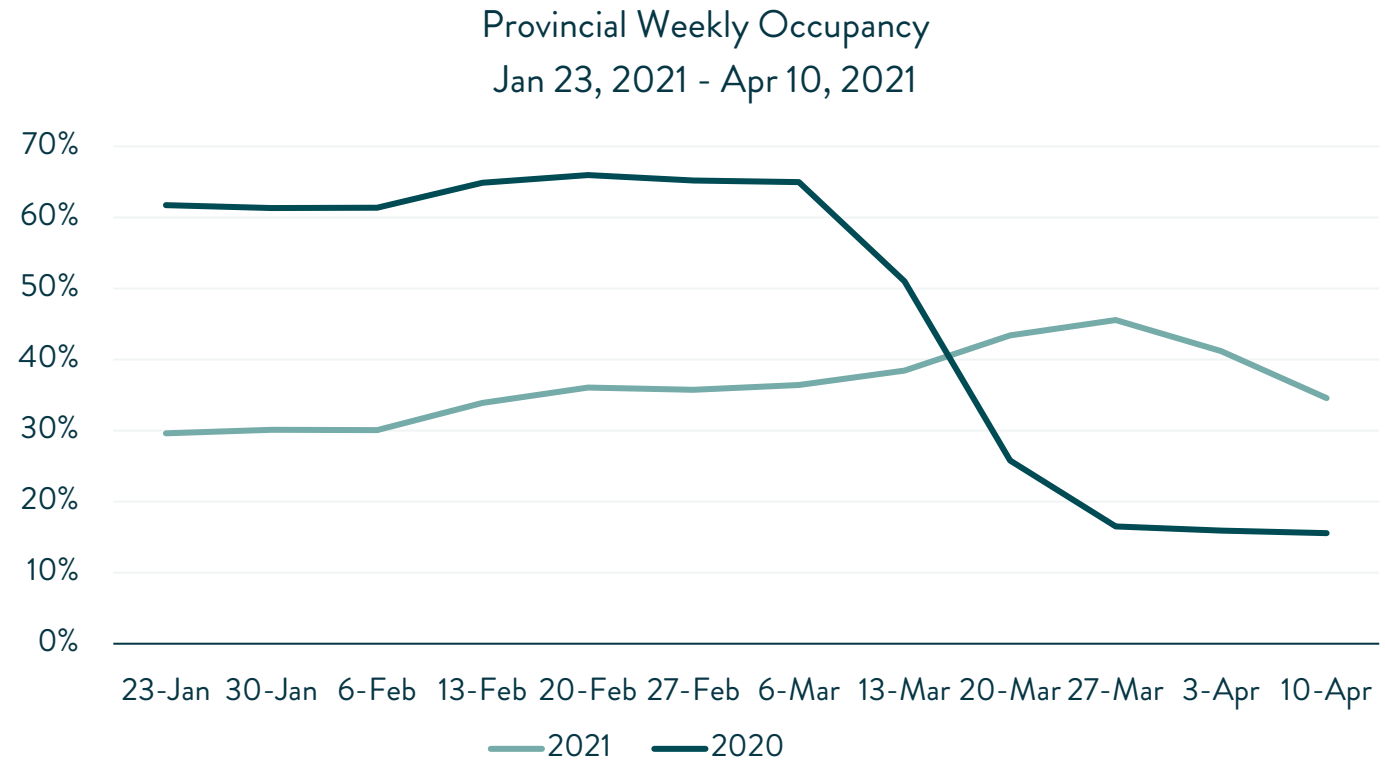


# BC and Regional Domestic Overnight Visitation Year-over-Year Percent Change



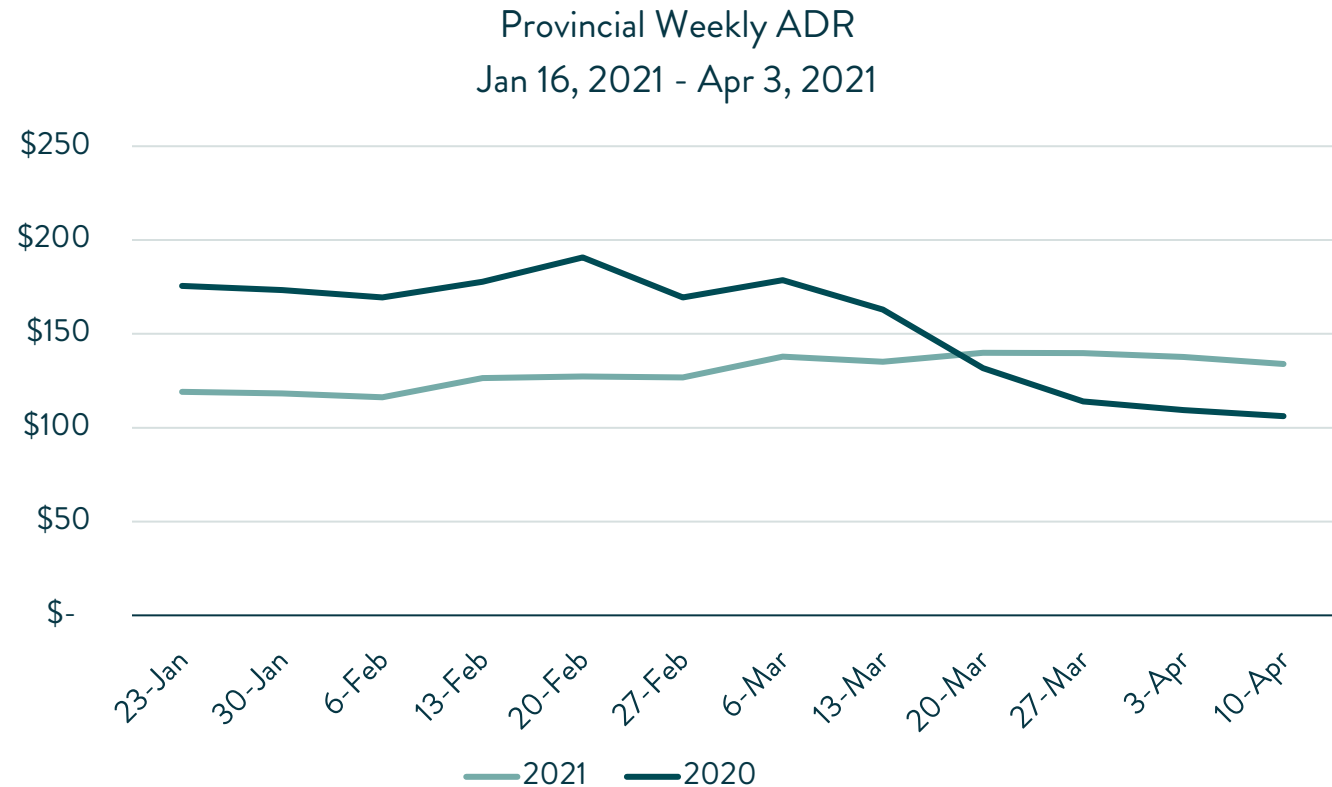
## *BC's occupancy rate (41.1%) down -4.6 points from the previous week*

- STR, an agency which reports BC's hotel performance, shows the average weekly occupancy for BC was 41.1% for the week of March 28 – April 3, 2021. This represents a decrease of -4.6 points from the previous week and an increase of +25.2 points compared to a similar period in 2020.



## *BC's average daily rate (\$137.50) down -0.5% from the previous week*

- STR, an agency which reports BC's hotel performance, shows BC's average daily rate (ADR) was \$137.50 for the week of March 28 – April 3, 2021. This represents a decrease of -0.5% from the previous week and an increase of +25.7% compared to a similar period in 2020.



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

	Mar. 28 – Apr. 3, 2021	Week-over-Week Mar. 28 – Apr. 3, 2021 vs. Mar. 21 - 27, 2021	Year-over-Year Mar. 28 – Apr. 3, 2021 vs. Mar. 29 – Apr. 4, 2020	Mar. 28 – Apr. 3, 2021	Week-over-Week Mar. 28 – Apr. 3, 2021 vs. Mar. 21 - 27, 2021	Year-over Year Mar. 28 – Apr. 3, 2021 vs. Mar. 29 – Apr. 4, 2020
	Occupancy Rate	Occupancy Point Change	Occupancy Point Change	ADR	ADR Percent Change	ADR Percent Change
<b>British Columbia</b>	<b>41.1%</b>	<b>-4.6</b>	<b>+25.2</b>	<b>\$137.50</b>	<b>-0.5%</b>	<b>+25.7%</b>
Vancouver (City of)	29.1%	-1.7	+22.2	\$176.38	+2.6%	+35.6%
Whistler	14.4%	-24.8	+12.6	\$232.56	-14.2%	+118.4%
Victoria	43.2%	-9.2	+29.6	\$128.22	+0.7%	+51.6%
Kelowna	42.1%	+0.2	+32.6	\$119.79	+9.9%	+18.7%
Kamloops	52.8%	-6.9	+39.5	\$94.14	+0.3%	+7.6%
Richmond	56.3%	-3.6	+25.2	\$201.01	+6.3%	+49.5%
Revelstoke	39.5%	-4.6	+28.4	\$147.33	-2.0%	+65.3%





## *BC's revenue per available room (RevPAR) (\$56.47) down -10.5% from the previous week*

- STR, an agency which reports BC's hotel performance, shows BC's revenue per available room (RevPAR) was \$56.47 for the week of March 28 – April 3, 2021. This represents a decrease of -10.5% from the previous week.
- However, BC's RevPAR showed an increase (+224.4%) for the week of March 28 – April 3, 2021 compared to a similar period in 2020. RevPAR substantially increased for all reported cities compared to a similar period in 2020 as well. The increase seen was partially due to the timing of Easter weekend compared to previous years.

	Mar. 28 – Apr. 3, 2021 RevPAR	Week-over-Week Mar. 28 – Apr. 3, 2021 vs. Mar. 21 – 27, 2021 RevPAR Percent Change
<b>British Columbia</b>	<b>\$56.47</b>	<b>-10.5%</b>
Vancouver (City of)	\$51.28	-2.9%
Whistler	\$33.51	-68.4%
Victoria	\$55.39	-17.0%
Kelowna	\$50.42	+10.3%
Kamloops	\$49.68	-11.2%
Richmond	\$113.12	-0.1%
Revelstoke	\$58.26	-12.3%

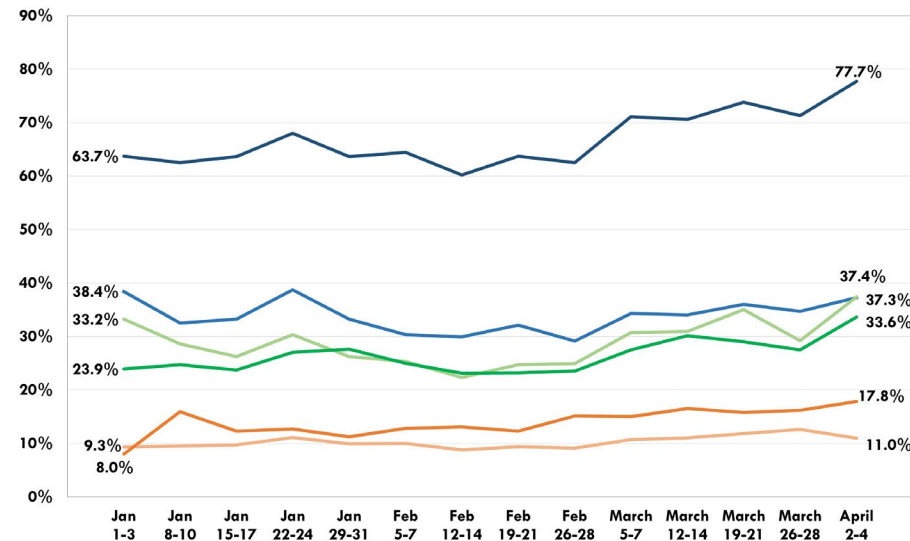
Source: [2021 STR, STR Global Ltd - STR Mar 28 – Apr 3, 2021](#)



# *Destination Analysts reports 77.7% of American travellers are dreaming of or planning a trip*

- Destination Analysts, a US-based tourism research company, shared that 77.7% of American travellers are dreaming of or planning a trip.
- 37.4% day-dreamed about taking a leisure trip, while 33.6% researched travel ideas online.
- 17.8% made travel reservations and 11.0% researched travel ideas offline.

## AMERICANS ARE DREAMING OF TRAVEL & MAKING PLANS AT RECORD LEVELS FOR 2021 JANUARY 1—APRIL 4, 2021



QUESTION: IN THE PAST WEEK, WHICH OF THE FOLLOWING HAVE YOU DONE? (SELECT ALL THAT COMPLETE THE SENTENCE) IN THE PAST WEEK I HAVE \_\_\_\_\_

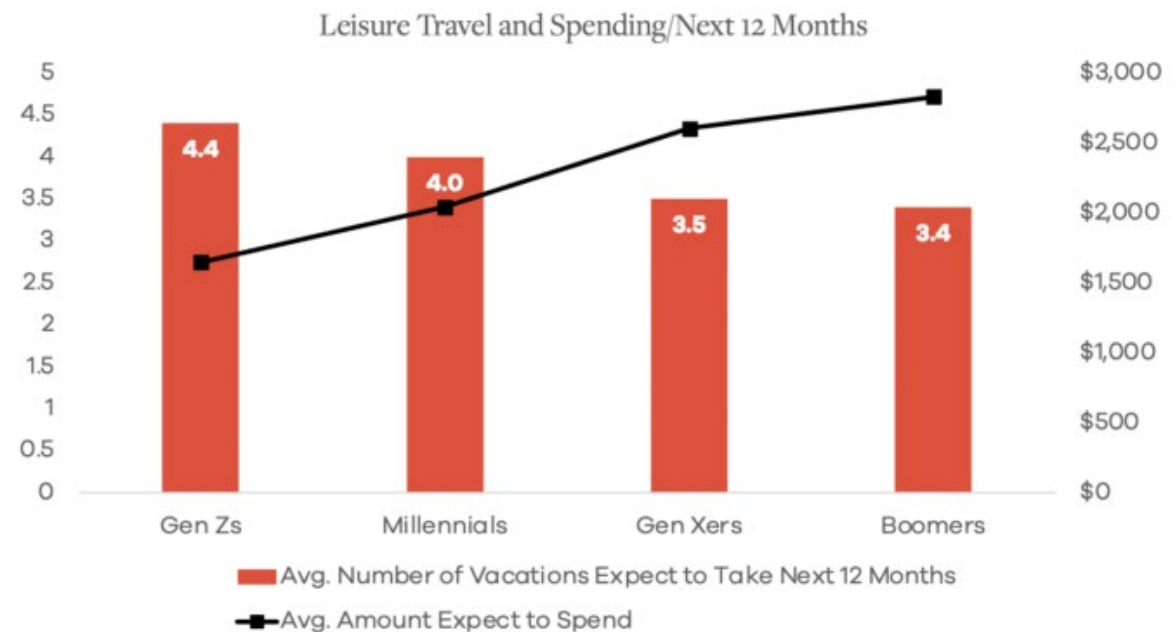
(Base: Waves 43-56. All respondents, 1,206, 1,225, 1,205, 1,206, 1,209, 1,209, 1,216, 1,210, 1,204, 1,209, 1,204, 1,208, 1,202 and 1,206 completed surveys.)

Destination Analysts  
DO YOUR RESEARCH

Source: [Destination Analysts, April 5, 2021](#)

# *MMGY Global's recent survey of American travellers predicts a tremendous summer rebound for travel*

- MMGY Global's recent survey of American travellers predicts a tremendous summer rebound for travel, with active leisure travellers (those who intend to travel within the next 12 months) expecting to take 3.7 overnight leisure trips in 2021 and spend an average of \$2,415 on those trips.



© 2021 MMGY Global  
Source: 2021 Portrait of American Travelers

**MMGY** Travel  
Intelligence



Source: [2021 Portrait of American Travelers, MMGY Global, March 31 2021](#)

# *MMGY Global President states consumers are eager to travel and will spend more time planning*

- Katie Briscoe, President of MMGY Global, presented TripAdvisor data at the IMPACT Sustainability Travel & Tourism Summit that showed consumers are eager to travel and will spend more time planning travel.
- Briscoe stated that almost three quarters of respondents said as a result of the pandemic, they will spend more time on the trip planning stages for their next trip, 71% more time selecting an accommodation, and 70% selecting things to do/attractions. Briscoe stated that people are anxious to start planning travel, which is why messaging is so critically important as the travel economy reopens.

## **INTENT: THE RETURN OF TRAVEL**

Consumers are eager to travel AND will spend more time planning travel.

**Q /** As a result of the COVID-19 pandemic, will you spend more time on each of the following trip planning stages for your next trip? (Yes)



Source: [IMPACT Sustainability Travel & Tourism, March 31, 2021](#)



# *Amadeus shares that 91% of international travellers would be comfortable using digital health passports to help restart travel*

- A recent study commissioned by Amadeus and delivered by Censuswide showed that 41% of international travellers are keen to book international travel within six weeks of restrictions lifting, and that 91% of travellers would be comfortable using digital health passports to help restart travel.



Source: [Amadeus, April 7, 2021](#)

## *Skift releases a series of good-news metrics as travel returns to the US*

- According to Skift, the US hotel sector added 40,000 jobs in March and hotel occupancy rates in the U.S. are almost at 60% of March 2020.
- Almost 1.6 million people travelled by plane on Thursday, April 2, surpassing the 1 million marker seen throughout the week, and drastically up from the 124,000 passengers seen April 1, 2020.
- The US Centers for Disease Control and Prevention issued guidelines Friday allowing fully vaccinated Americans to travel, with over 56 million Americans already vaccinated.



Source: [Skift, April 2, 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.





## DESTINATION BRITISH COLUMBIA®

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

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