



DESTINATION
BRITISH COLUMBIA®

COVID-19 Research Roundup

June 28, 2021



Gribbell Island, Cariboo Chilcotin Coast

BC's Restart Plan

We are in Step 3 of [BC's Restart Plan](#), a 4-step plan launched on May 25, 2021. The earliest date to progress to Step 4 is September 7.

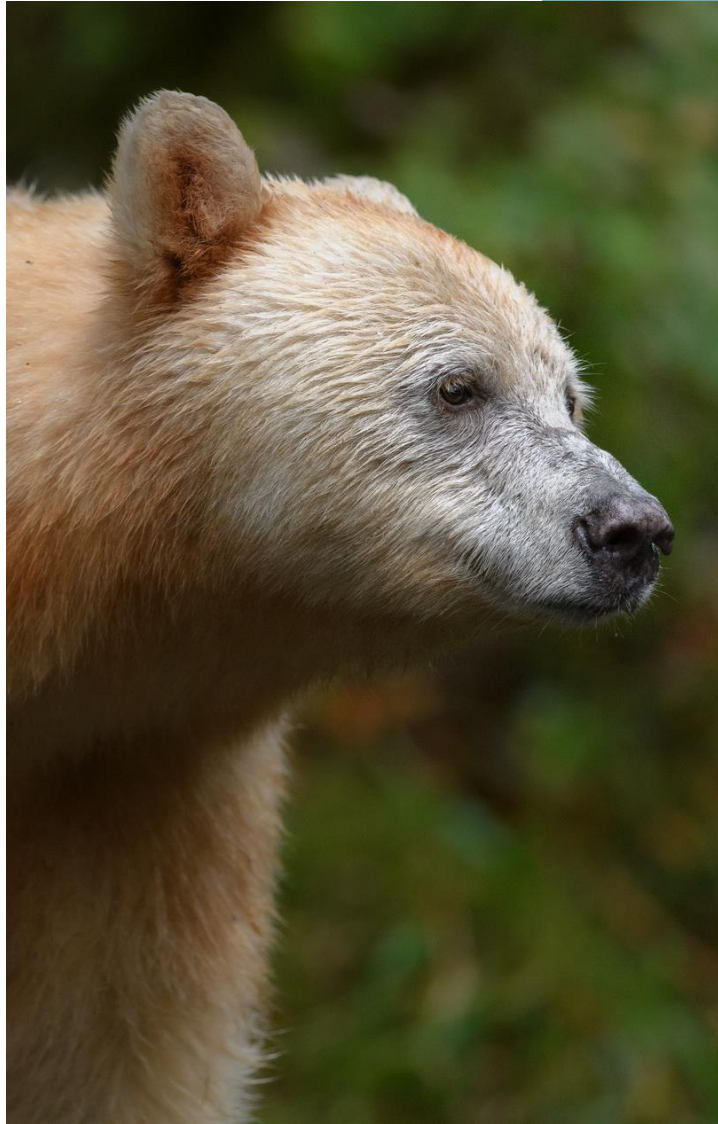
Province-wide restrictions

The insights noted in this Research Roundup were gathered before the beginning of Step 3 on July 1, 2021. Step 2 of BC's Restart Plan marked the return of provincial travel for BC residents. Restrictions on interprovincial travel and health and safety protocols, such as physical distancing and capacity limits, remain in place until Step 4 (September 7 at the earliest).

On June 18, 2021, Canadian and US officials agreed to extend the closure of the border between the two countries to non-essential travel until at least July 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.

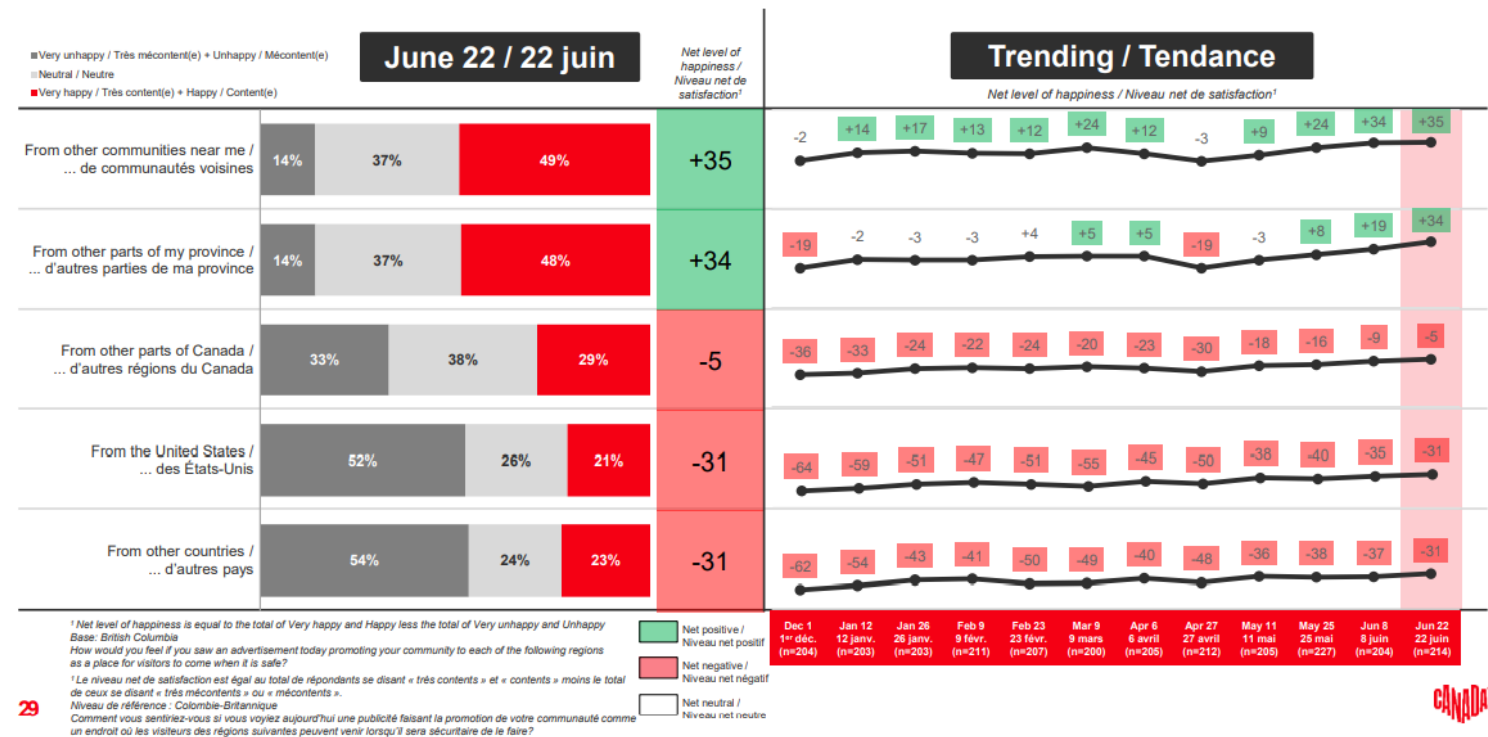
Last week in brief:

- Destination Canada reports 49% of BC residents would be happy seeing their community promoted to visitors from nearby communities
- 37% of BC residents intend to travel elsewhere in BC for an overnight trip in the next 4 weeks
- BC's weekly domestic overnight visitation is up +15.8% from the previous week
- BC sees a decrease of -9.7% in weekly domestic overnight visitation compared to the same period in 2020
- BC's occupancy rate (45.5%) is up +6.8 points from the previous week
- BC's average daily rate (\$147.76) is up +4.7% from the previous week
- BC's RevPAR (\$67.19) is up +23.1% from the previous week
- Destination Canada reports that 2022 domestic tourism expenditures in Canada are expected to be down -10.7% from 2019 levels
- Destination Analysts show that 47.0% of US travellers are likely to visit a small town, village or rural destination in the remainder of 2021
- Longwoods reveals that 67% of US travellers agreed they would feel safe travelling outside their community
- Skift shows North America's Recovery Index score reached 84 points out of 100 in May 2021
- UNWTO reports Canada has vaccinated 67.3 out of every 100 people
- A summary of relevant tourism headlines from around the world
- Tourism and COVID-19 dashboard and reporting resources

Destination Canada reports 49% of BC residents would be happy seeing their community promoted to visitors from nearby communities

- In Destination Canada's latest Resident Sentiment report (June 22, 2021), 49% of BC residents said they'd be happy seeing their community promoted as a place to visit (when it is safe) to nearby communities, whereas 14% said they'd be unhappy resulting in a net happiness score of +35. This is up +1 point from the previous wave on June 8.
- 48% of BC residents said they'd be happy seeing their community promoted to visitors from other parts of the province, whereas 14% said they'd be unhappy resulting in a net happiness score of +34. This is up +15 points from the previous wave (June 8)
- The same report showed that 29% of BC residents would be happy seeing their community promoted to other parts of Canada, whereas 33% would be unhappy resulting in a net happiness score of -5. This is up +4 points from the previous wave (June 8).

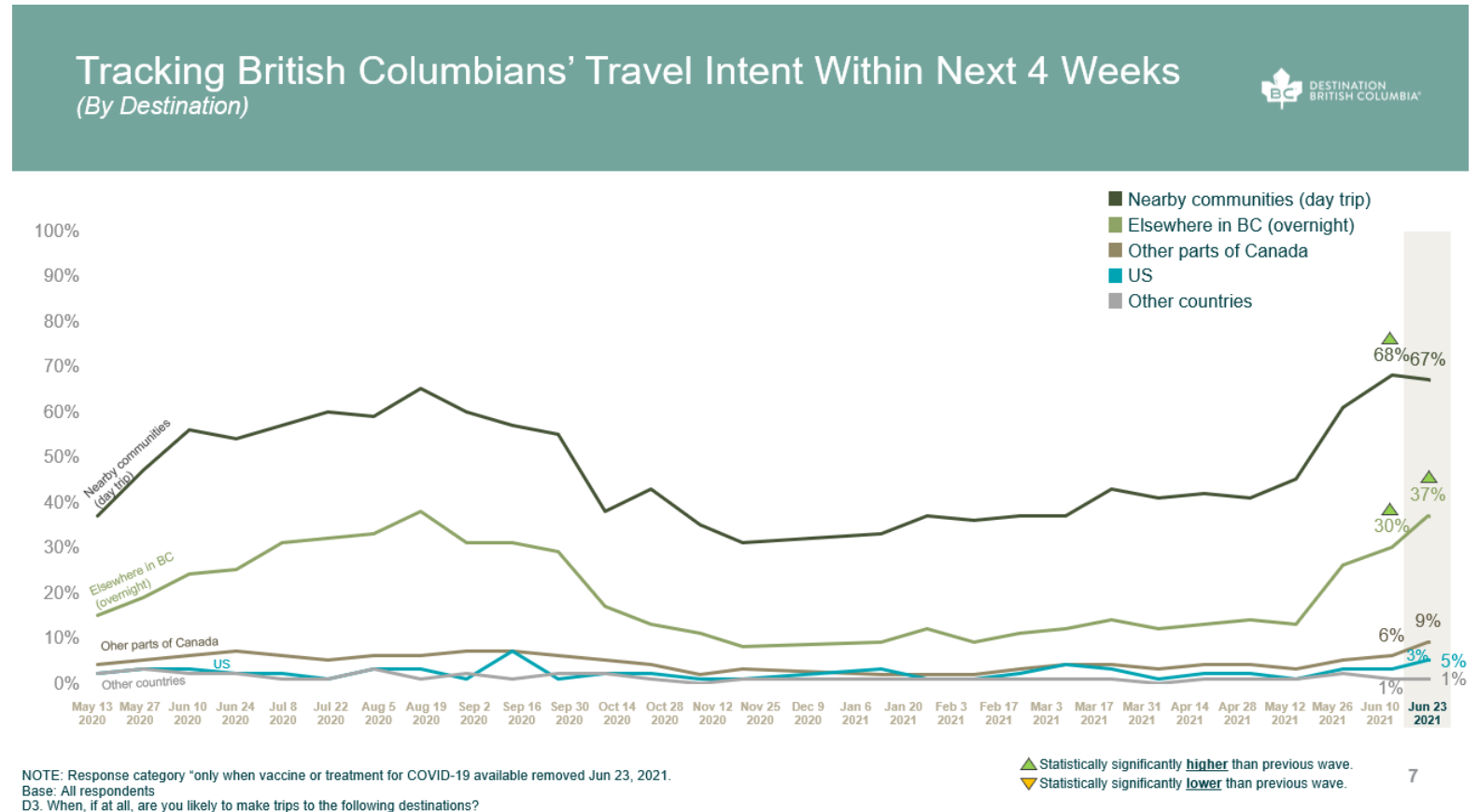
British Columbia / Colombie-Britannique



Source: [Destination Canada's Weekly COVID-19 Resident Sentiment, June 22, 2021](#)

37% of BC residents intend to travel elsewhere in BC for an overnight trip in the next 4 weeks

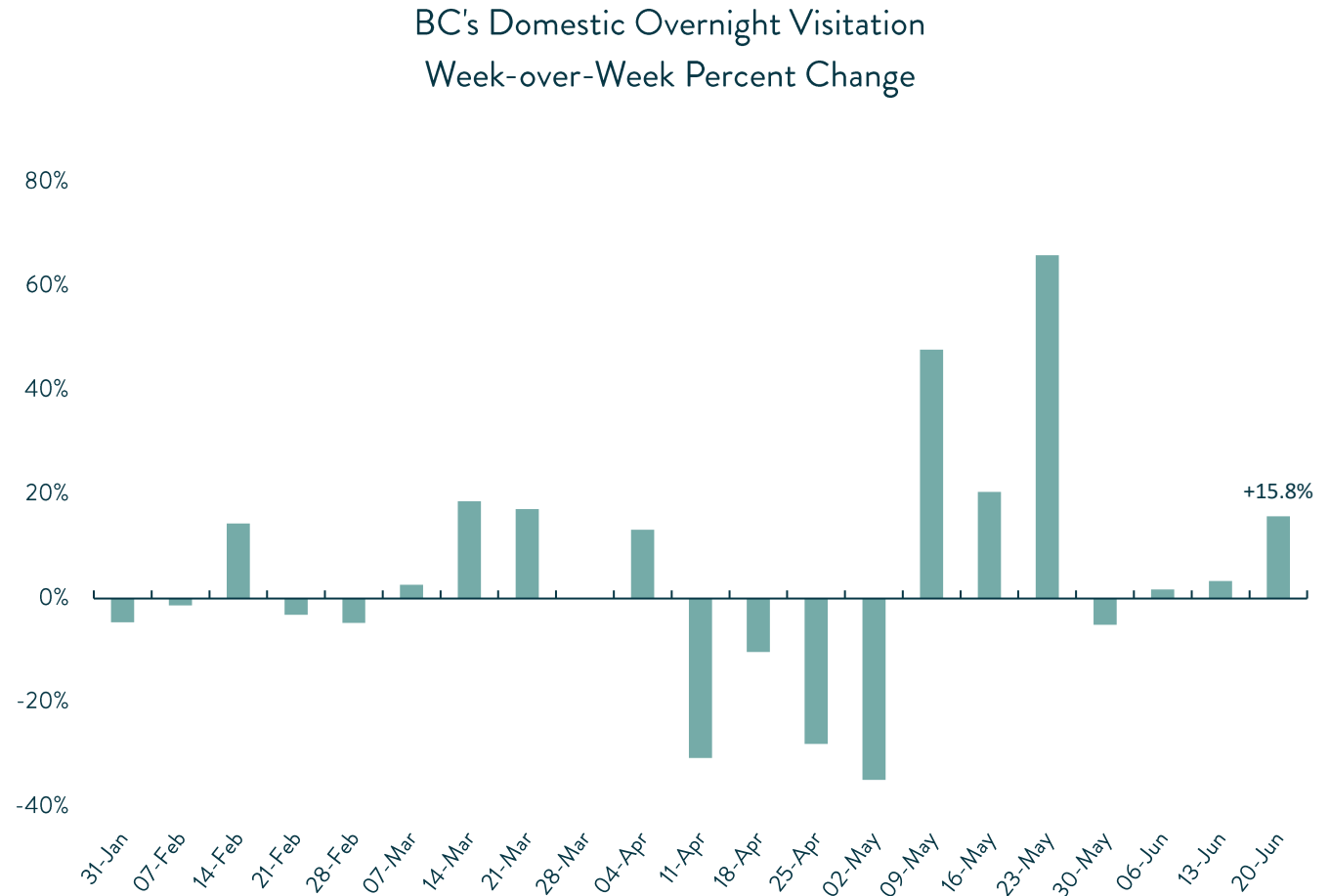
- In Destination BC's latest BC Residents' Public Perceptions Wave 29 (June 23, 2021) report, 37% of British Columbians said they intend to travel elsewhere in the province for an overnight trip in the next 4 weeks, up +7% from the previous wave (June 10).
- 67% of BC resident said they intend to travel to nearby communities for a day trip in the next 4 weeks (down -1% from the previous wave), 9% said they intend to travel to other provinces (up +3%), 5% intend to travel to the US (up +2%), and 1% intend to travel to other countries (no change from previous wave).



Source: [Destination BC's Residents' Public Perceptions: COVID-19 Travel and Tourism Wave 29, Insights West, June 23, 2021](#)

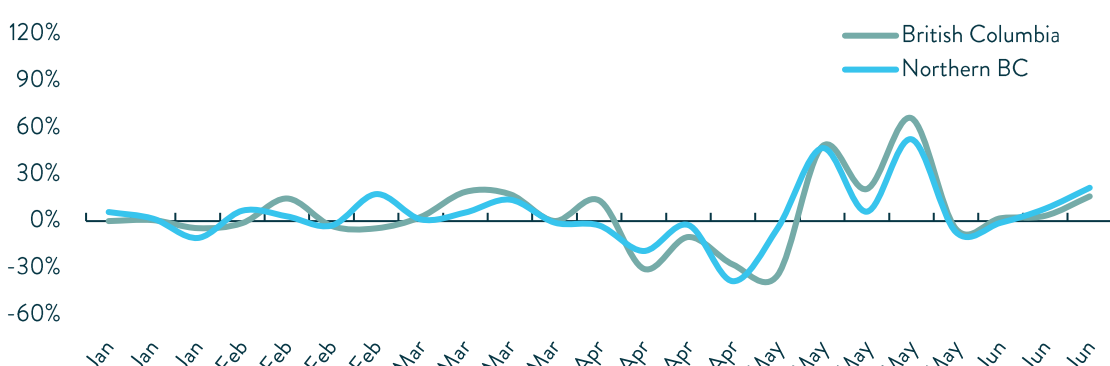
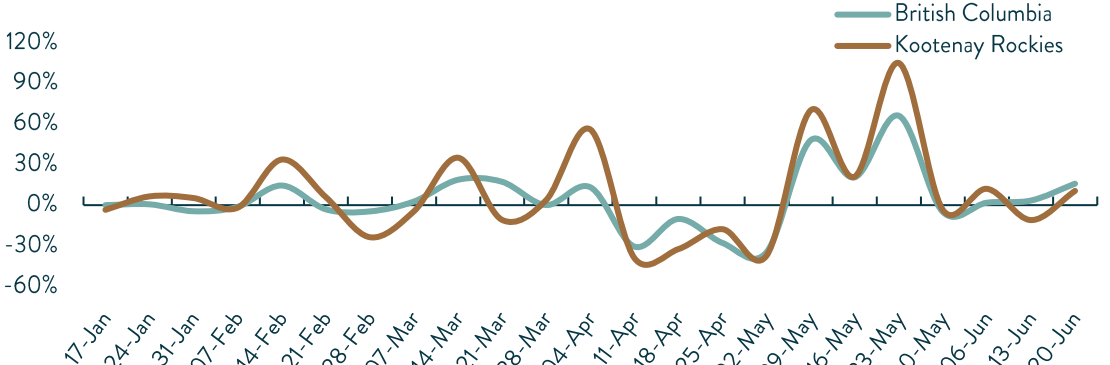
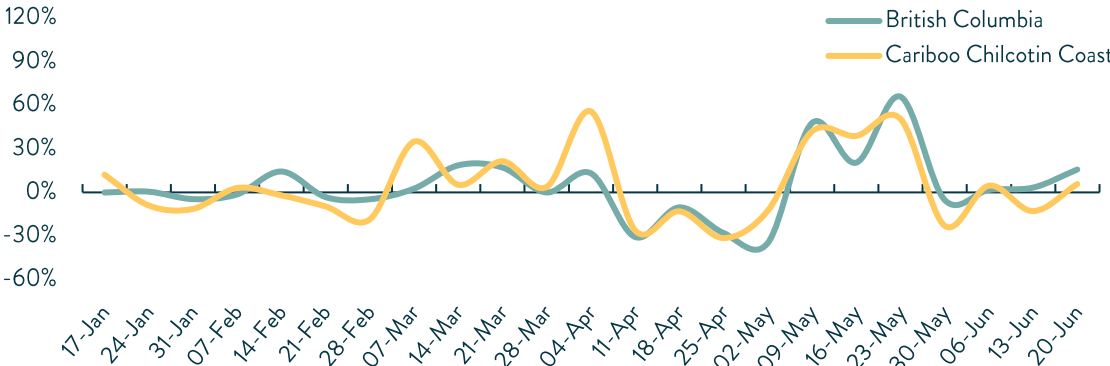
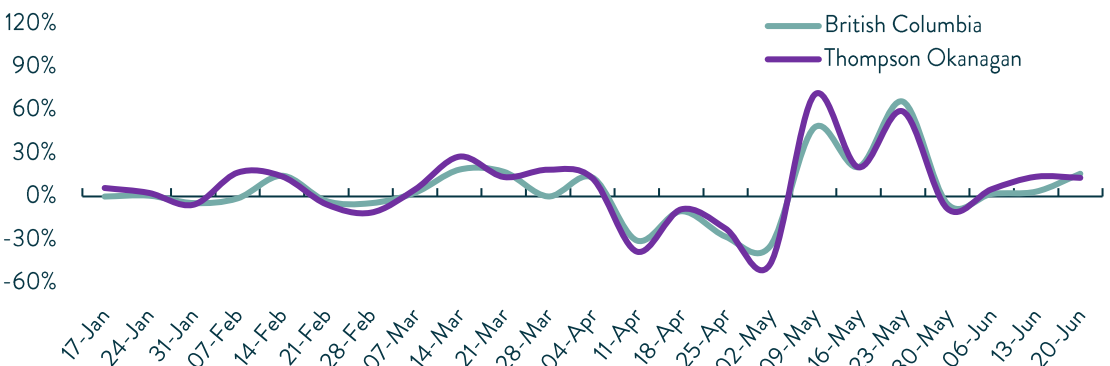
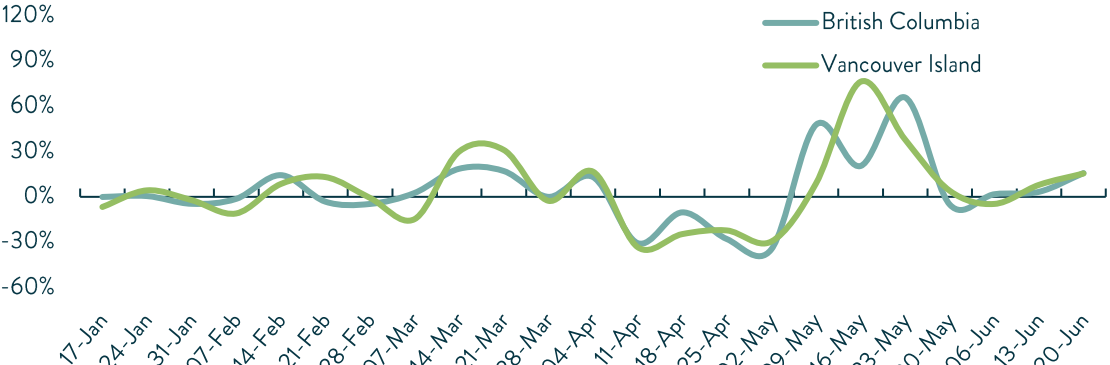
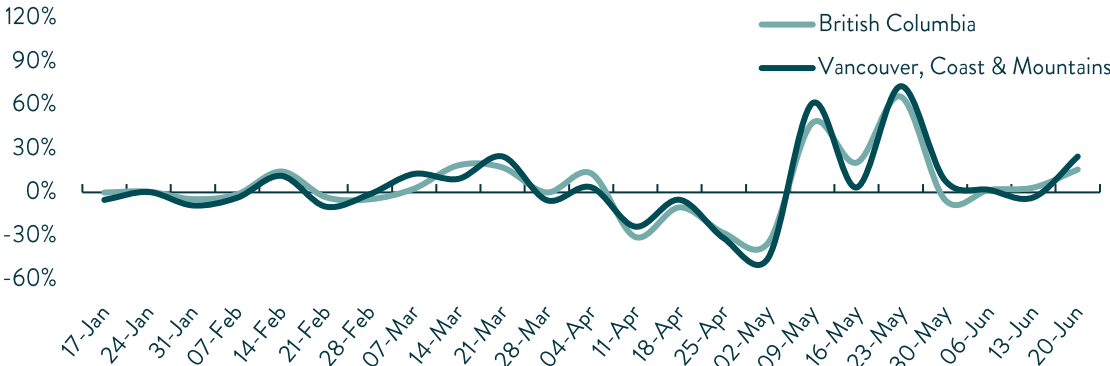
BC's weekly domestic overnight visitation is up +15.8% from the previous week

- According to Environics Analytics Weekly COVID Tracker Report, during the week ending June 20, 2021, BC experienced a week-over-week increase of +15.8% in weekly domestic overnight visitation.
- Week-over-week increases in domestic overnight visitation were seen in all six tourism regions across the province:
 - Vancouver, Coast & Mountains (+24.7%)
 - Northern BC (+21.4%)
 - Vancouver Island (+15.6%)
 - Thompson Okanagan (+12.9%)
 - Kootenay Rockies (+10.4%)
 - Cariboo Chilcotin Coast (+5.7%)



Source: [Environics Analytics Weekly COVID Tracker Report, June 20, 2021](#)

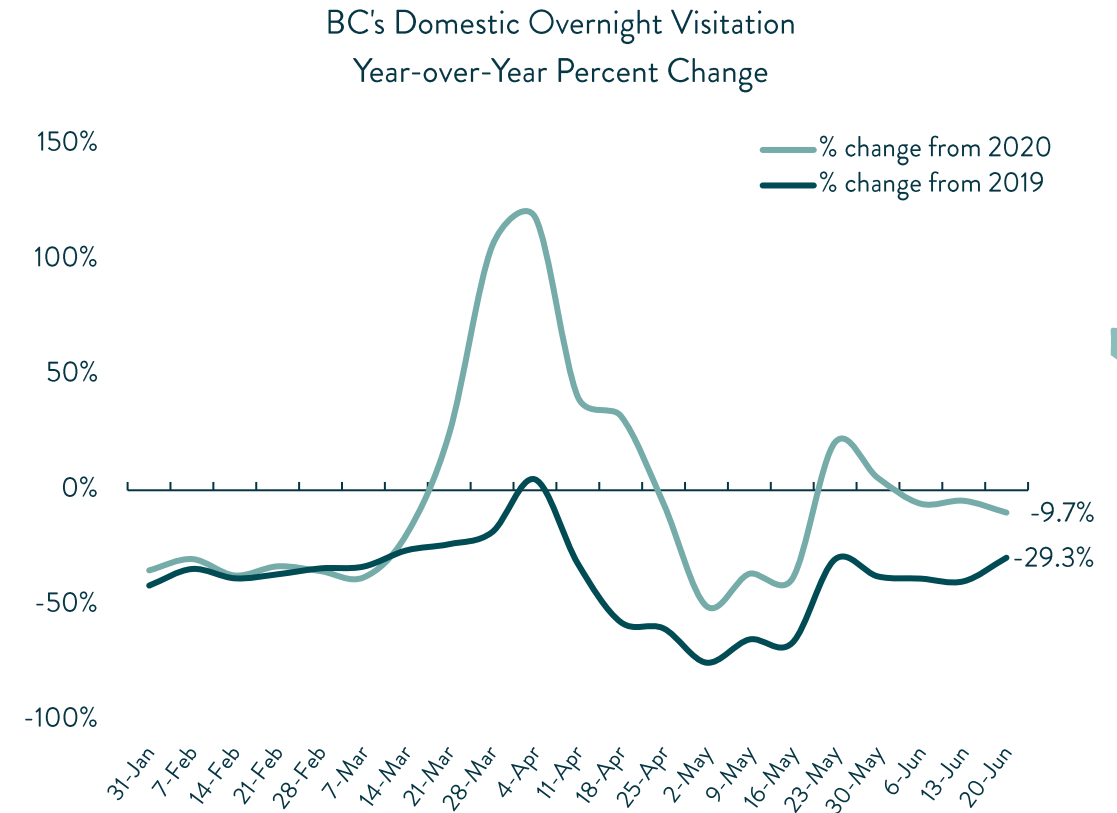
BC and Regional Domestic Overnight Visitation Week-over-Week Percent Change



Source: [Environics Analytics Weekly COVID Tracker Report, June 20, 2021](#)

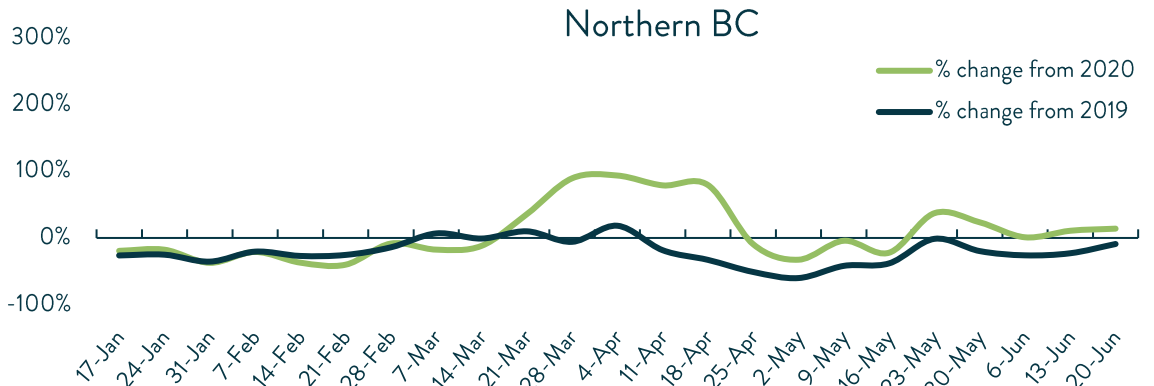
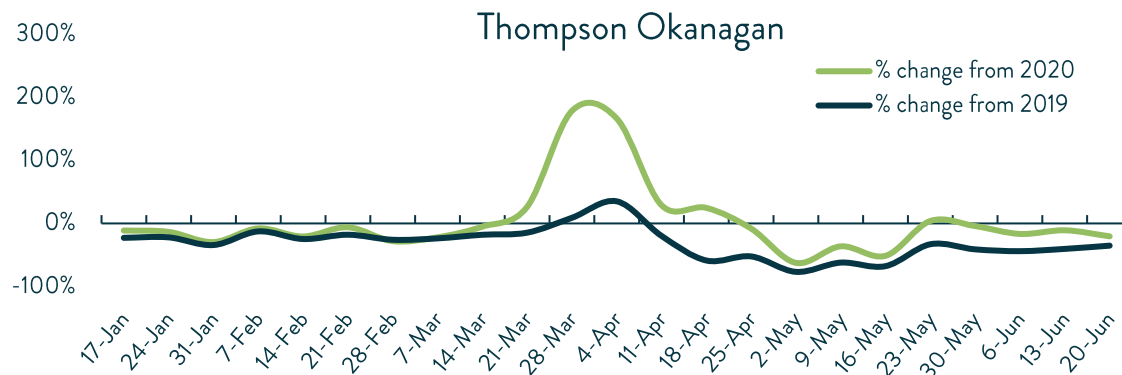
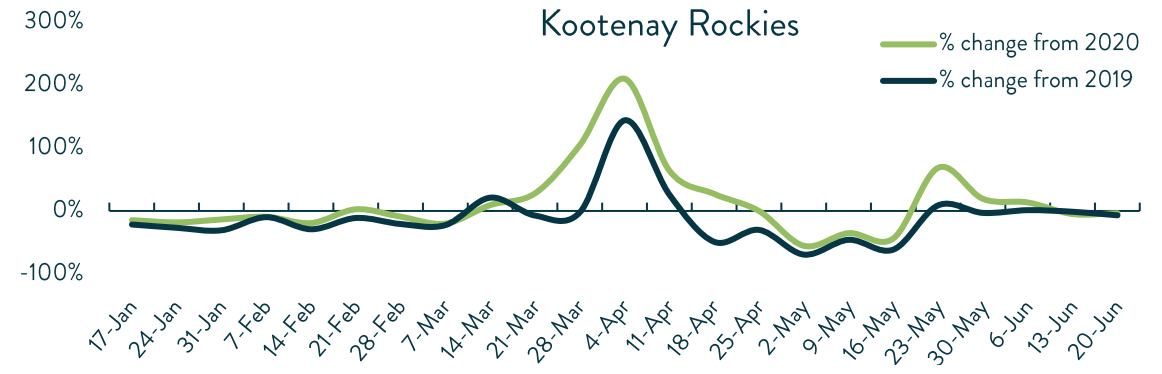
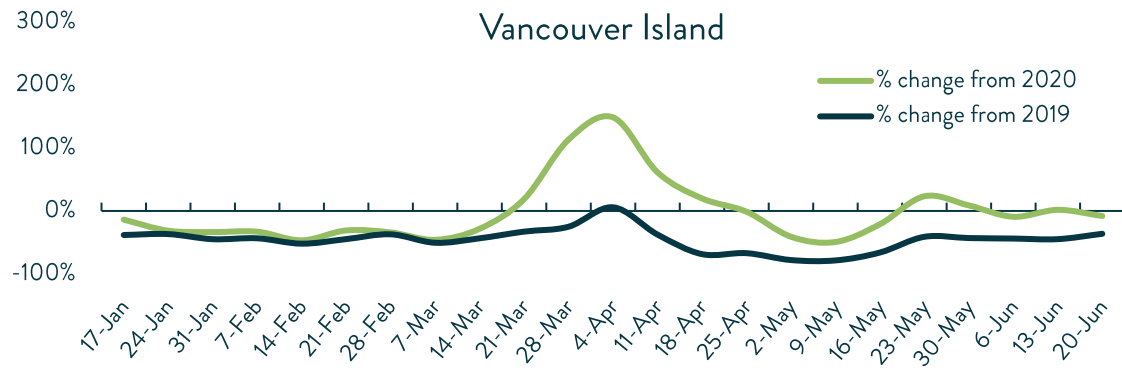
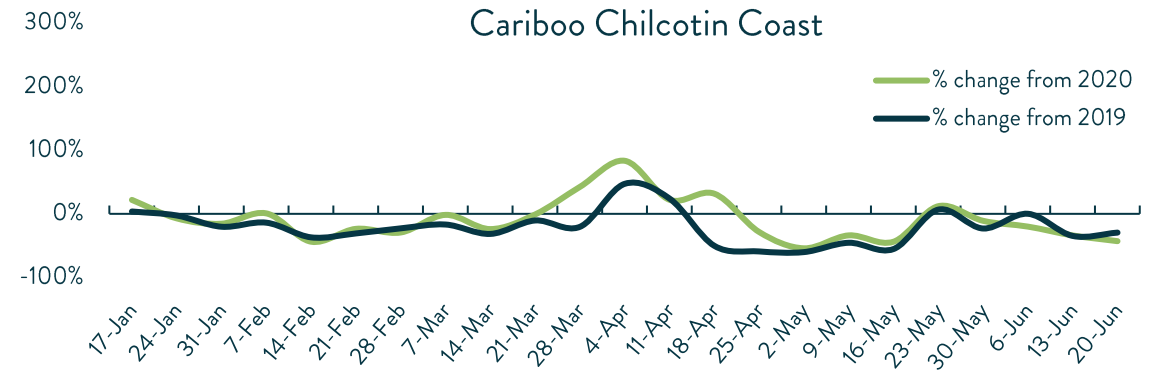
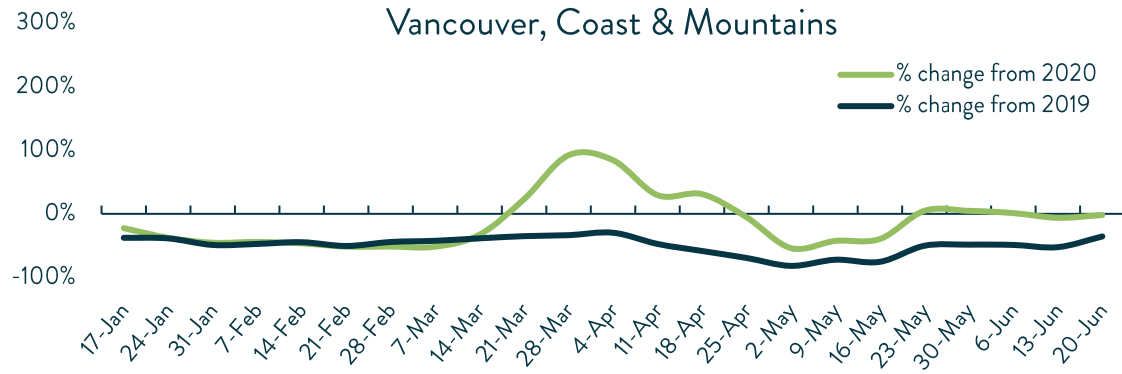
BC sees a decrease of -9.7% in weekly domestic overnight visitation compared to the same period in 2020

- For the week ending June 20, 2021, Environics Analytics reported that weekly domestic overnight visitation was down -9.7% compared to the same week in 2020. Compared to the same week in 2019, weekly domestic overnight visitation was down -29.3%.
- One of six tourism regions (Northern BC) across the province saw a year-over-year increase in weekly visitation when compared to the same period in 2020. All regions saw a decrease in weekly visitation when compared to the same period in 2019.
 - Northern BC (+13.8% over 2020; -9.4% over 2019)
 - Vancouver, Coast & Mountains (-1.7%; -35.2%)
 - Kootenay Rockies (-3.5%; -6.8%)
 - Vancouver Island (-8.0%; -36.4%)
 - Thompson Okanagan (-20.4%; -35.2%)
 - Cariboo Chilcotin Coast (-42.7%; -29.2%)



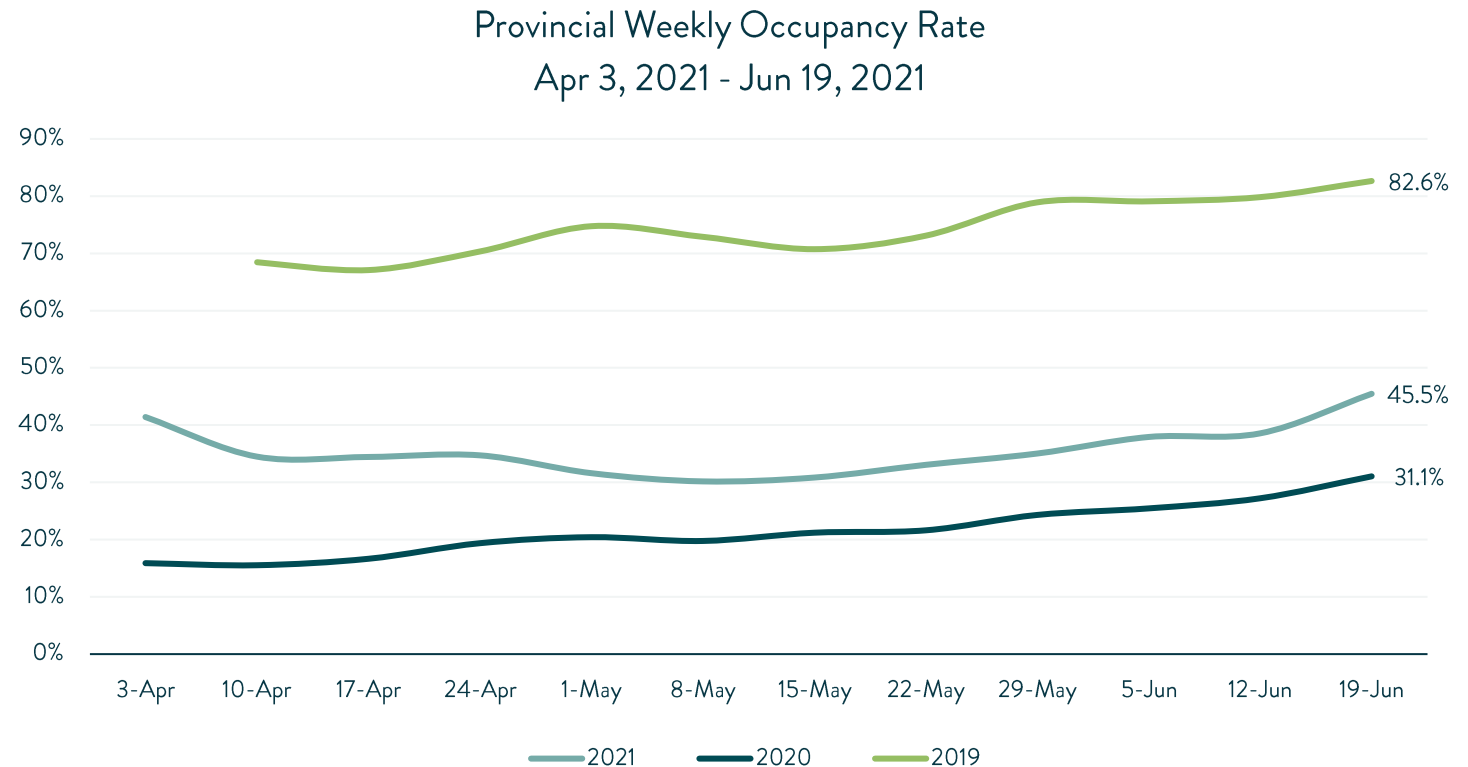
Source: [Environics Analytics Weekly COVID Tracker Report, June 20, 2021](#)

Regional Domestic Overnight Visitation Year-over-Year Percent Change



BC's occupancy rate (45.5%) is up +6.8 points from the previous week

- STR, an agency which reports BC's hotel performance, shows the average weekly occupancy rate for BC was 45.5% for the week of June 13 – 19, 2021. This represents an increase of +6.8 points from the previous week.
- It also represents an increase of +14.4 points compared to a similar period in 2020 and a decrease of -37.2 points compared to 2019.



*Please note data for 2019 is only available starting for the week April 7 - 13, 2019

Source: [2021 STR, STR Global Ltd, Jun 13 – 19, 2021](#)



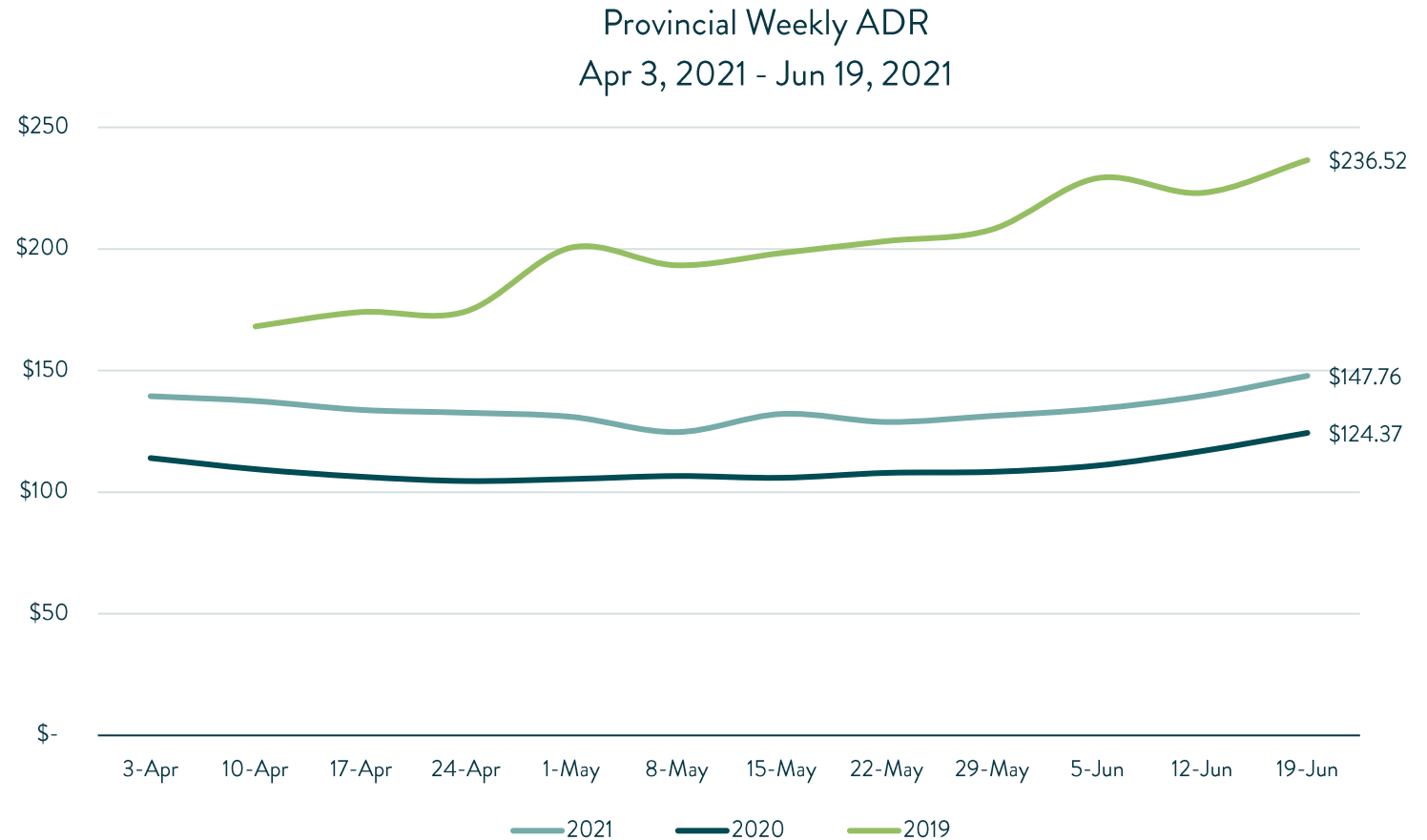
British Columbia's Weekly Hotel Occupancy Rate

	Jun 13 - 19, 2021	Week-over-Week Jun 13 - 19, 2021 vs. Jun 6 - 12, 2021	2021 vs. 2020 Jun 13 - 19, 2021 vs. Jun 14 - 20, 2020	2021 vs. 2019 Jun 13 - 19, 2021 vs. Jun 16 - 22, 2019
	Occupancy Rate	Occupancy Point Change	Occupancy Point Change	Occupancy Point Change
British Columbia	45.5%	+6.8	+14.4	-37.2
Vancouver (City of)	28.9%	+4.2	+14.0	-65.1
Whistler	22.1%	+7.0	+0.7	-55.9
Victoria	34.2%	+9.2	+7.8	-48.9
Kelowna	50.8%	+12.3	+16.8	-31.7
Kamloops	62.8%	+7.5	+29.2	-13.5
Richmond	65.9%	+2.0	+22.4	-27.4
Revelstoke	46.9%	+20.6	+15.0	-16.0



BC's average daily rate (\$147.76) is up +4.7% from the previous week

- STR, an agency which reports BC's hotel performance, shows BC's average daily rate (ADR) was \$147.76 for the week of June 13 – 19, 2021. This represents an increase of +4.7% from the previous week.
- It also represents an increase of +18.8% compared to a similar period in 2020 and a decrease of -37.5% compared to 2019.



*Please note data for 2019 is only available starting for the week April 7 - 13, 2019

British Columbia's Weekly Hotel Average Daily Rate (ADR)

	Jun 13 - 19, 2021 ADR	Week-over-Week Jun 13 - 19, 2021 vs. Jun 6 - 12, 2021 ADR Percent Change	2021 vs. 2020 Jun 13 - 19, 2021 vs. Jun 14 - 20, 2020 ADR Percent Change	2021 vs. 2019 Jun 13 - 19, 2021 vs. Jun 16 - 22, 2019 ADR Percent Change
British Columbia	\$147.76	+4.7%	+18.8%	-37.5%
Vancouver (City of)	\$182.00	-0.3%	+26.7%	-49.1%
Whistler	\$234.34	+3.2%	+25.6%	-13.8%
Victoria	\$163.75	+6.3%	+33.9%	-31.4%
Kelowna	\$154.24	+10.8%	+16.7%	-11.6%
Kamloops	\$107.35	+3.2%	+9.7%	-11.7%
Richmond	\$173.21	+4.6%	+27.4%	-26.8%
Revelstoke	\$114.42	+6.8%	+6.8%	-11.1%



BC's RevPAR (\$67.19) is up +23.1% from the previous week

- STR, an agency which reports BC's hotel performance, shows BC's revenue per available room (RevPAR) was \$67.19 for the week of June 13 – 19, 2021. This represents an increase of +23.1% from the previous week.
- BC's RevPAR showed an increase (+73.9%) for the week of June 13 – 19, 2021 compared to a similar period in 2020 and a decrease (-65.6%) compared to 2019.
- RevPAR substantially increased for all reported cities compared to a similar period in 2020 but remain below 2019 levels.

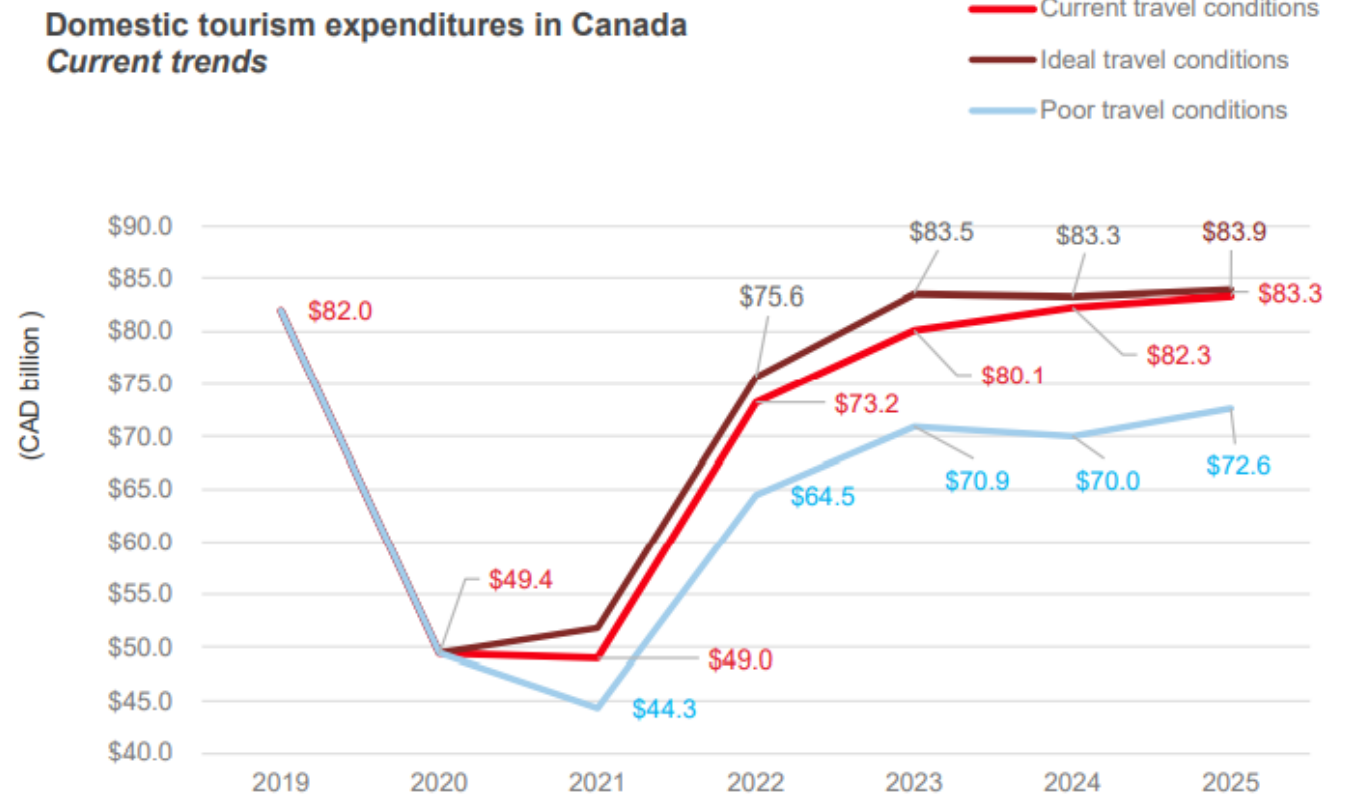
	Jun 13 - 19, 2021 RevPAR	Week-over-Week Jun 13 - 19, 2021 vs. Jun 6 - 12, 2021 RevPAR Percent Change	2021 vs. 2020 Jun 13 - 19, 2021 vs. Jun 14 - 20, 2020 RevPAR Percent Change
British Columbia	\$67.19	+23.1%	+73.9%
Vancouver (City of)	\$52.66	+16.5%	+145.3%
Whistler	\$51.67	+50.8%	+30.0%
Victoria	\$55.94	+45.7%	+73.5%
Kelowna	\$78.37	+46.2%	+74.4%
Kamloops	\$67.44	+17.2%	+104.8%
Richmond	\$114.17	+7.8%	+92.8%
Revelstoke	\$53.61	+90.7%	+57.1%



Source: [2021 STR, STR Global Ltd, Jun 13 – 19, 2021](#)

Destination Canada reports that 2022 domestic tourism expenditures in Canada are expected to be down -10.7% from 2019 levels

- According to Destination Canada's June Visitor Economy Forecast Update, domestic tourism expenditures in Canada are expected to reach \$73.2 billion (CAD) in 2022, down -10.7% compared to pre-pandemic levels in 2019.
- Based on ideal travel conditions, domestic tourism expenditures in 2022 could be as high as \$75.6 billion (CAD), whereas expenditures could be as low as \$64.5 billion (CAD) based on poor travel conditions.



Source: [Destination Canada Visitor Economy Forecast Update, June 2021](#)

Destination Analysts show that 47.0% of US travellers are likely to visit a small town, village or rural destination in the remainder of 2021

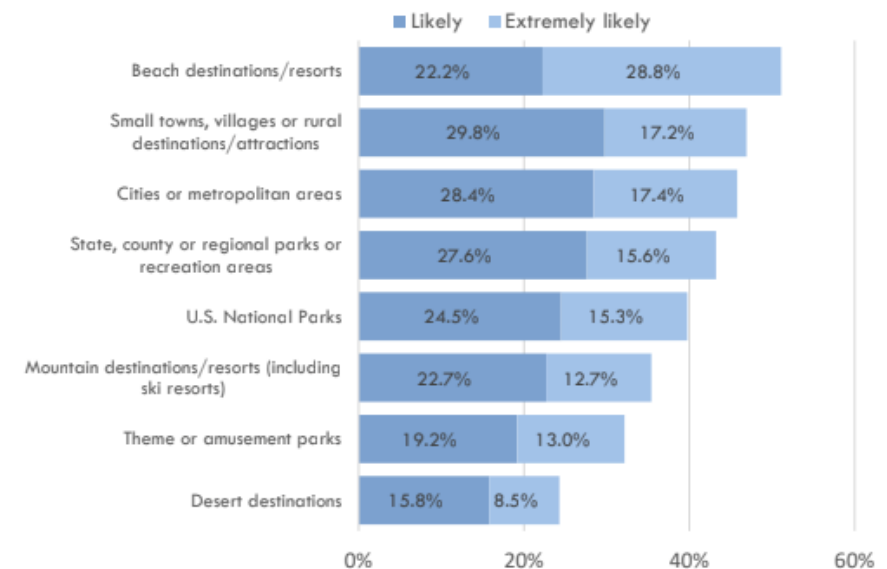
- The latest report by Destination Analysts, a US-based tourism research company, showed that 47.0% of US travellers said they are likely to visit a small town / village / rural destination resort in the remainder of 2021.
- The same survey showed that 51.0% of US travellers said they are likely to visit a beach destination / resort in the remainder of 2022, 35.4% are likely to visit a mountain destination / ski resort, and 24.3% are likely to visit a desert destination.

LIKELIHOOD OF VISITING EACH DESTINATION TYPE, 2021

Question: Please think about the places you want to visit during the remainder of 2021.

How LIKELY are you to visit each type of destination at some point during the rest of this year? (Use the scale below to answer)

(Base: Wave 67 data. All respondents, 1,200 completed surveys. Data collected June 16-18, 2021)



Destination Analysts
AN TOURISM RESEARCH

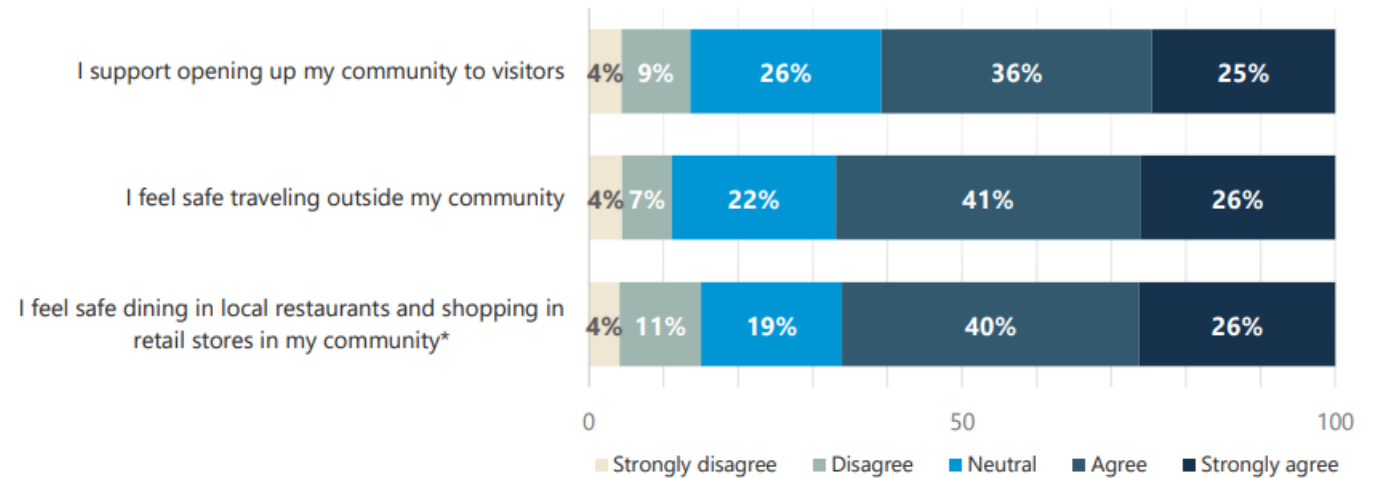


Source: [Destination Analyst Weekly Report, June 21, 2021](#)

Longwoods reveals that 67% of US travellers agreed they would feel safe travelling outside of their community

- Longwoods' Wave 38 Travel Sentiment Study showed that 67% of US travellers agreed they would feel safe travelling outside their community.
- The same survey showed that 61% of US travellers agreed with opening their community to outside visitors.

Perceptions of Safety and Travel

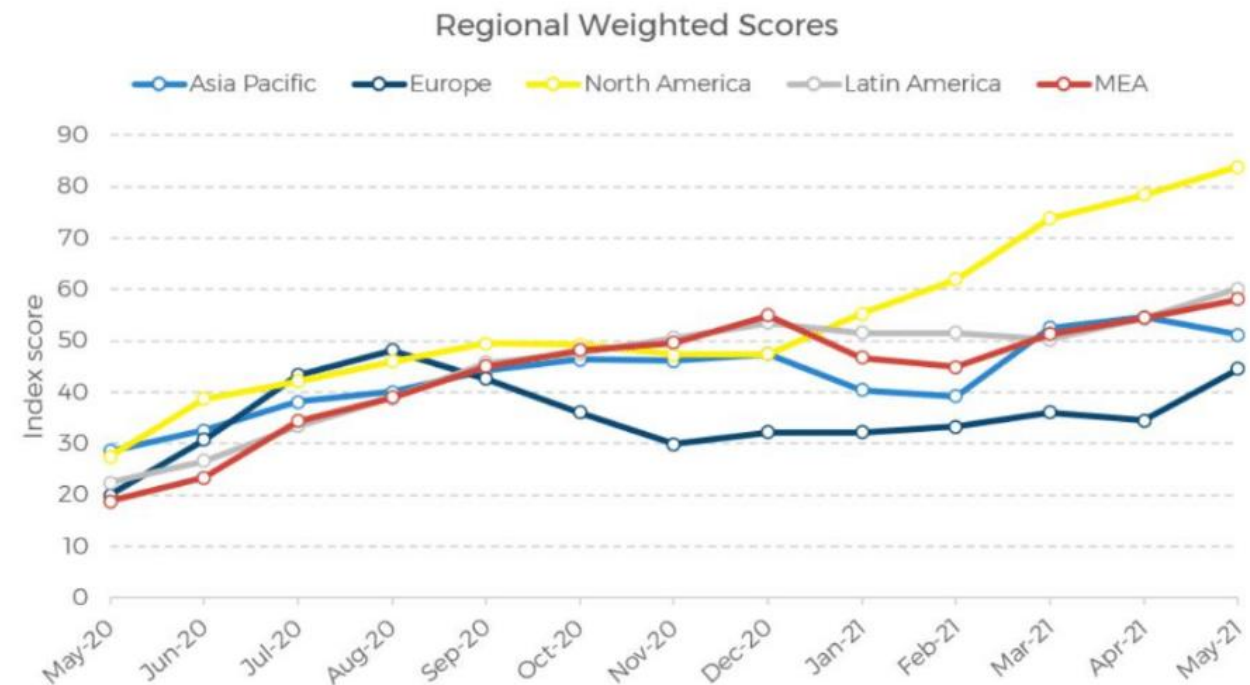


Source: [Longwoods US Travel Sentiment Survey, June 2, 2021](#)

Skift shows North America's Recovery Index score reached 84 points out of 100 in May 2021

- The latest research from Skift showed that North America's average Recovery Index, an overall index of travel performance based on factors such as lodging, flight, and car rentals, rose +5 points from April 2021 to 84 out of 100 in May 2021.
- In comparison, Europe's Recovery Index score in May 2021 rose +10 points from April to 45 out of 100 and Asia's Recovery Index score in May fell -4 points from April to 51 out of 100.

Exhibit 2: Europe is still the weakest performer but performance rose considerably



Source: [Skift Recovery Index: May 2021 Highlights](#)



UNWTO reports Canada has vaccinated 67.3 out of every 100 people

- According to the UNWTO, as of June 24, Canada has vaccinated (with at least one dose) 67.3 out of every 100 people, compared to the US which has vaccinated 53.3 out of every 100 people. France has vaccinated 48.8 out of every 100 people.
- The same dashboard shows that the global average for vaccination rates (with at least one dose) is now at 22.6 per 100 people.
- For up-to-date information on health indicators, air travel, and destination regulations, visit the [UNWTO/IATA Destination Tracker dashboard](#).



Source: [UNWTO/IATA, June 25, 2021](#)

A summary of relevant tourism headlines from around the world

We've included some relevant tourism headlines from around the world:

- [Switzerland to reopen borders to British travellers this weekend](#) (Breaking Travel News)
- [UK travel sector demands reopening in nationwide protest](#) (Breaking Travel News)
- [Barcelona expects up to 40,000 people to attend its Mobile Tech Show next week](#) (Skift)
- [Group of US senators say no more masks on planes for vaccinated Americans](#) (Skift)



Tourism and COVID-19 dashboard and reporting resources

- Destination BC's [Tourism Industry Dashboard](#) tracks statistics across tourism-related industries including accommodations, food and 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 also 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.
- The [Business Council of BC Dashboard](#) allows users to quickly understand the economic toll, recovery, and economic climate of BC.
- The [Ipsos Consolidated Economic Indicators](#) dashboard displays economic indicators across the globe including investment, employment, and GDP.
- [Phocuswire's](#) COVID-19 liveblog covers the pandemic's impact and recovery in the tourism industry.





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

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