



# COVID-19 Research Roundup

October 11, 2021



Vancouver, Vancouver, Coast & Mountains

## *BC's Restart Plan*

We are in Step 3 of [BC's Restart Plan](#), a 4-step plan launched on May 25, 2021.

### **Province-wide restrictions**

The insights noted in this Research Roundup were gathered after the beginning of Step 3 on July 1, 2021. Health and safety protocols, such as physical distancing and capacity limits, vary by location and business type and remain in place until Step 4.

On July 19, 2021, Canada announced the opening of the border to fully vaccinated US citizens starting August 9. On September 7, Canada began allowing any fully vaccinated travellers entry into the country.

Information provided in this Research Roundup Report highlights local and global insights which may be applicable to BC now.

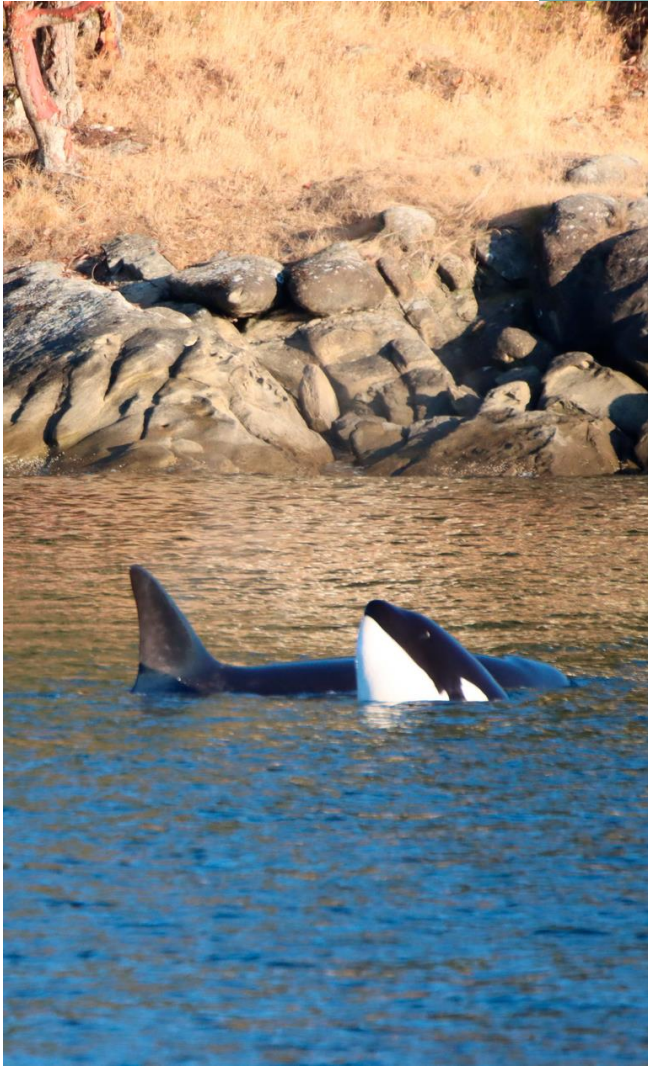




Destination BC is compiling relevant research and articles every two weeks related to the travel and tourism industry and COVID-19.

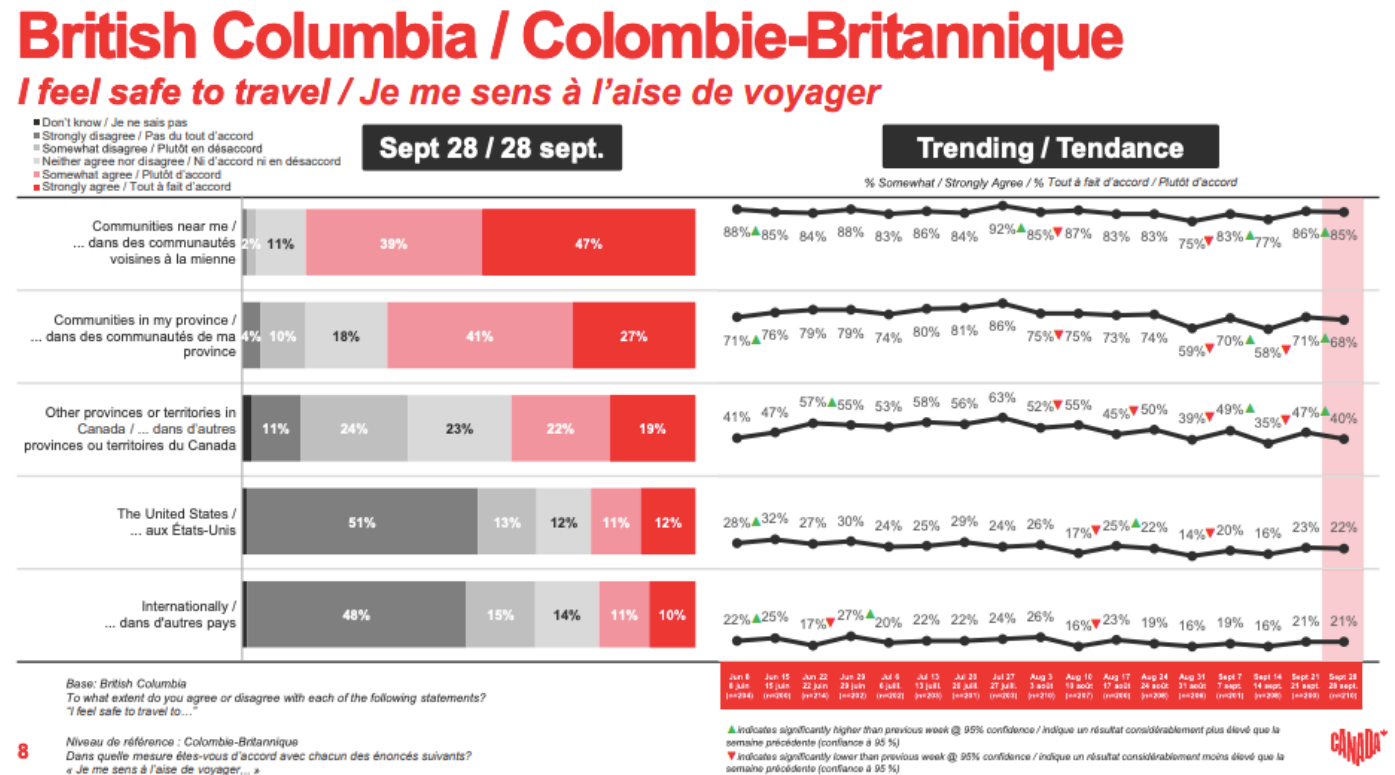
Last two weeks in brief:

- Destination Canada reports that 68% of BC residents feel safe travelling to other communities in the province
- Destination BC's Resident Public Perceptions study reports that 75% of BC residents plan to travel to nearby communities within the next 2-3 months
- BC weekly domestic overnight visitation decreased -8.1% from the previous week
- BC sees a decrease of -0.9% in weekly domestic overnight visitation compared to the same period in 2020
- BC's occupancy rate (62.6%) increased +20.0 points compared to the same period in 2020
- BC's average daily rate (\$166.77) increased +28.5% compared to the same period in 2020
- BC's RevPAR (\$104.4) decreased -10.4% from the previous week
- Destination BC's Snapshot of BC Travel reports that international bookings make up 40% of total BC Air Bookings for the week of September 28 - October 4
- Skift reports Canada's Recovery Index score reaches 68 points out of 100 in September 2021
- Destination Analysts reports that 48.7% of US travellers consider leisure travel a high spending priority within the next 3 months
- Longwoods report that 25% of US travellers said COVID-19 is not influencing their travel plans within the next 6 months
- UNWTO reports 46.3 of out every 100 people worldwide have received at least one dose of a vaccine
- A summary of relevant tourism headlines from around the world
- Tourism and COVID-19 dashboard and reporting resources



# Destination Canada reports that 68% of BC residents feel safe travelling to other communities in the province

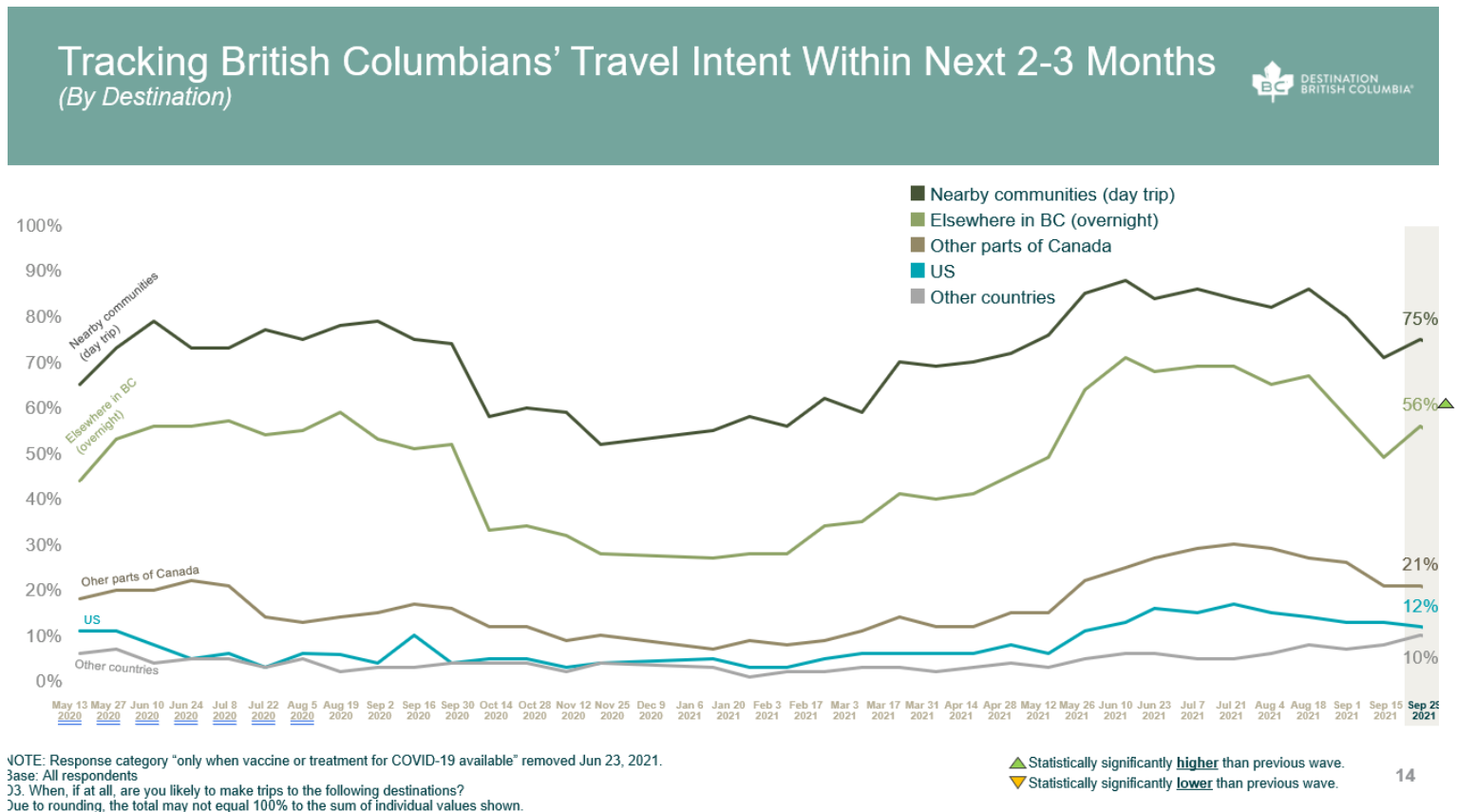
- In Destination Canada's latest Resident Sentiment report (September 28, 2021), 68% of BC residents said they would feel safe travelling to other communities in the province.
- The same report showed that 85% of BC residents feel safe travelling to communities near them and 41% feel safe to travelling to other provinces or territories in Canada.
- Additionally, 22% of BC residents feel safe travelling to the United States and 21% feel safe travelling to other countries.



Source: [Destination Canada's Weekly COVID-19 Resident Sentiment, Sep 28, 2021](#)

# Destination BC's Resident Public Perceptions study reports that 75% of BC residents plan to travel to nearby communities within the next 2-3 months

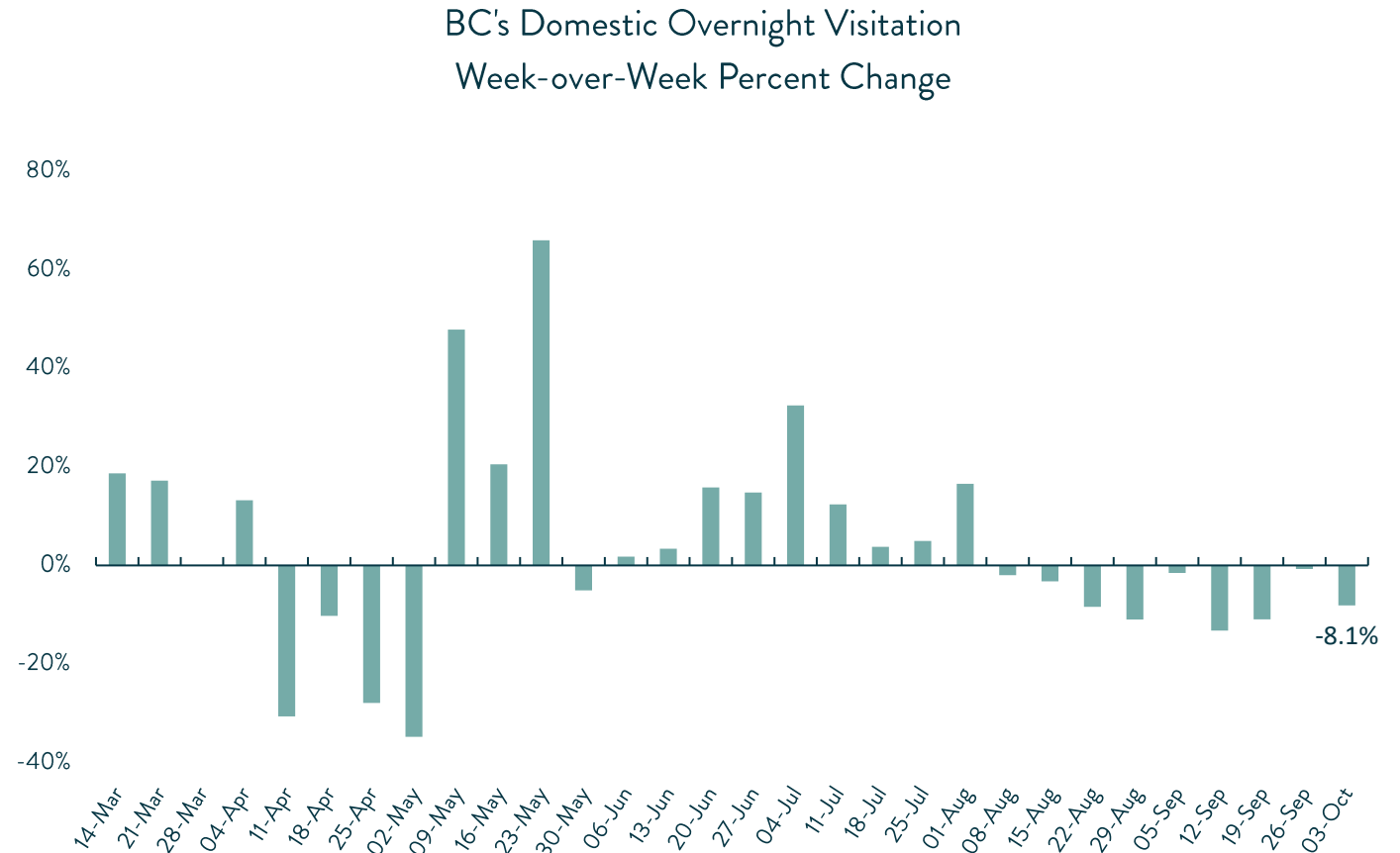
- In Destination BC's latest BC Residents' Public Perceptions Wave 36 (September 29, 2021) report, an estimated 75% of British Columbian residents stated they intend to travel to nearby communities for a day trip within the next 2-3 months.
- Additionally, 56% of BC residents intend to travel elsewhere in BC for an overnight trip in the next 2-3 months and 21% plan to travel to other parts of Canada.
- BC residents' intent to travel to the US and to other countries is at 12% and 10%, respectively.



Source: [Destination BC's Residents' Public Perceptions: COVID-19 Travel and Tourism Wave 36, Sep 29, 2021](#)

# BC weekly domestic overnight visitation decreased -8.1% from the previous week

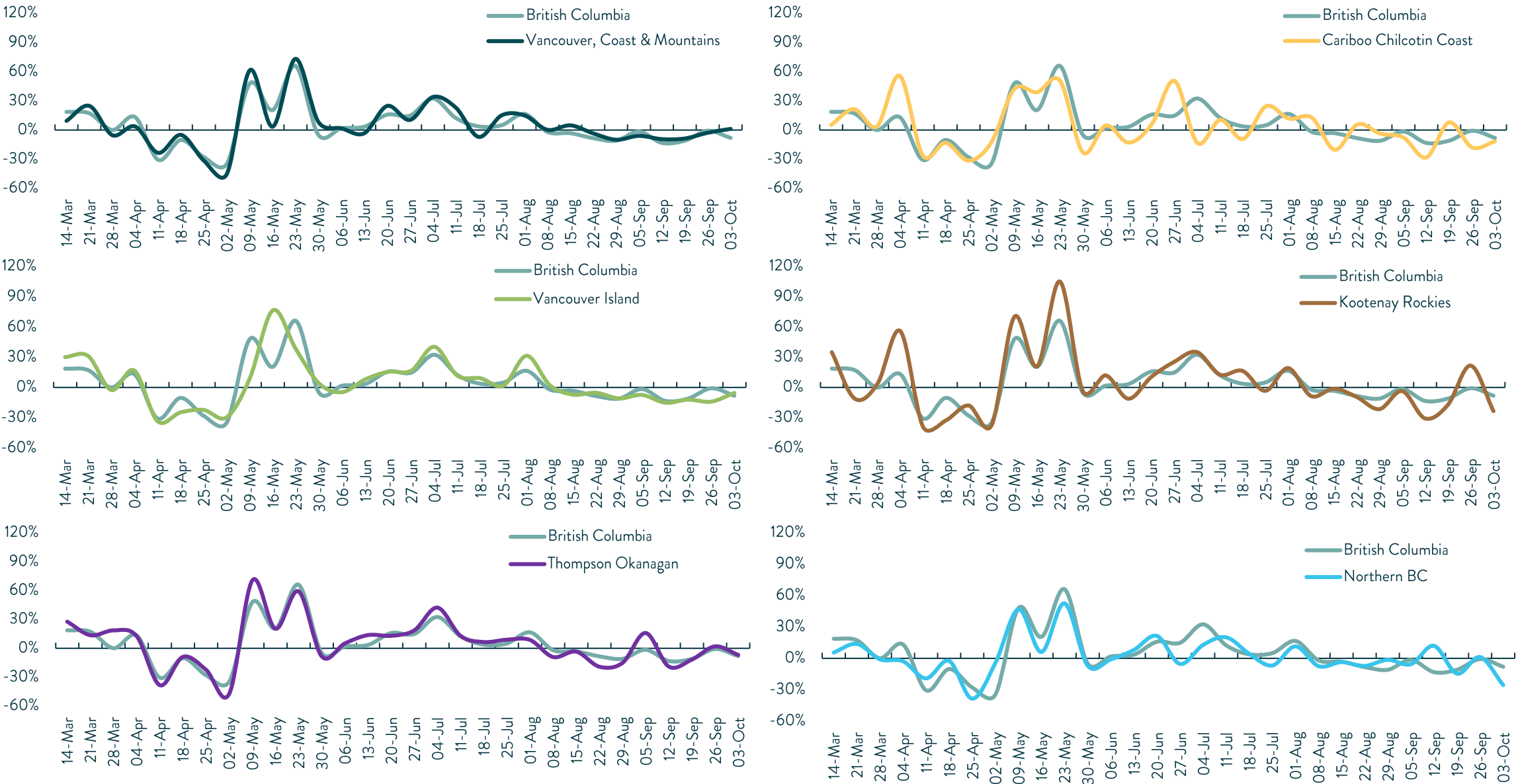
- According to Environics Analytics Weekly COVID Tracker Report, during the week ending September 26, 2021, BC experienced a week-over-week decrease of -8.1% in weekly domestic overnight visitation.
- Week-over-week increases in domestic overnight visitation was seen in one of six tourism regions across the province:
  - Vancouver, Coast & Mountains (+1.1%)
- Week-over-week decreases in domestic overnight visitation were seen in the other five tourism regions:
  - Vancouver Island (-5.3%)
  - Thompson Okanagan (-6.9%)
  - Cariboo Chilcotin Coast (-11.6%)
  - Northern BC (-23.4%)
  - Kootenay Rockies (-25.6%)



Source: [Environics Analytics Weekly COVID Tracker Report, Oct 3, 2021](#)



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

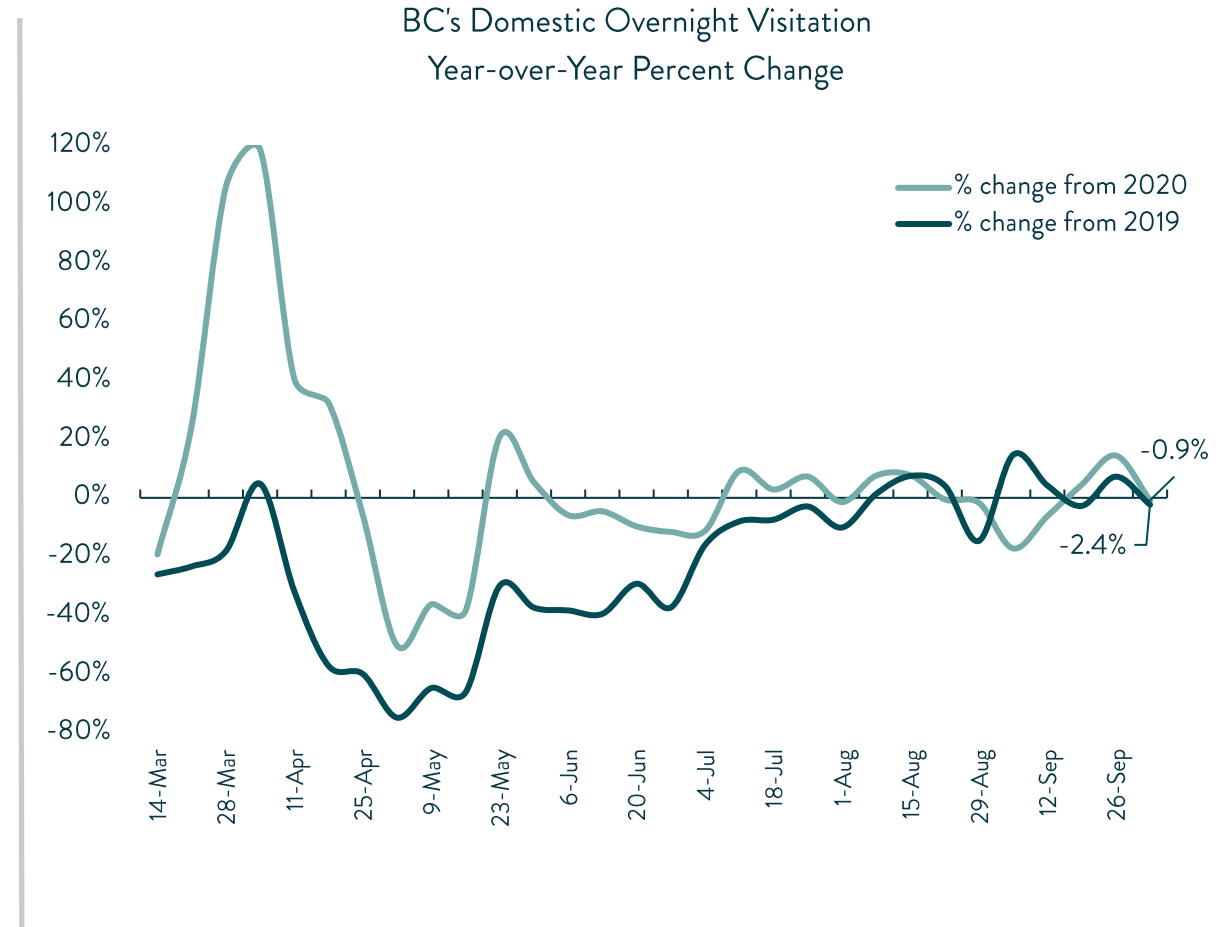


Source: [Environics Analytics Weekly COVID Tracker Report, Oct 3, 2021](#)



# BC sees a decrease of -0.9% in weekly domestic overnight visitation compared to the same period in 2020

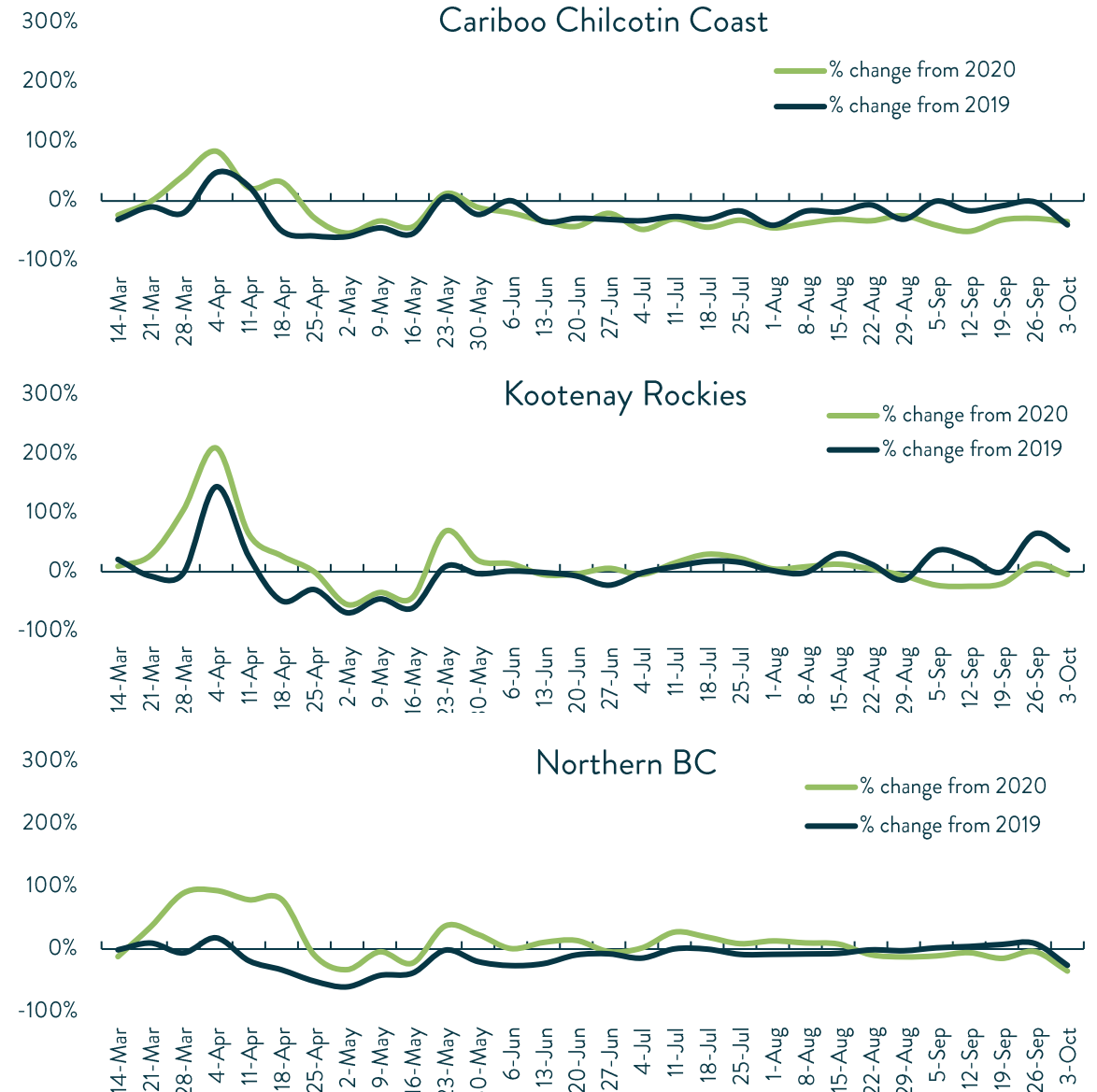
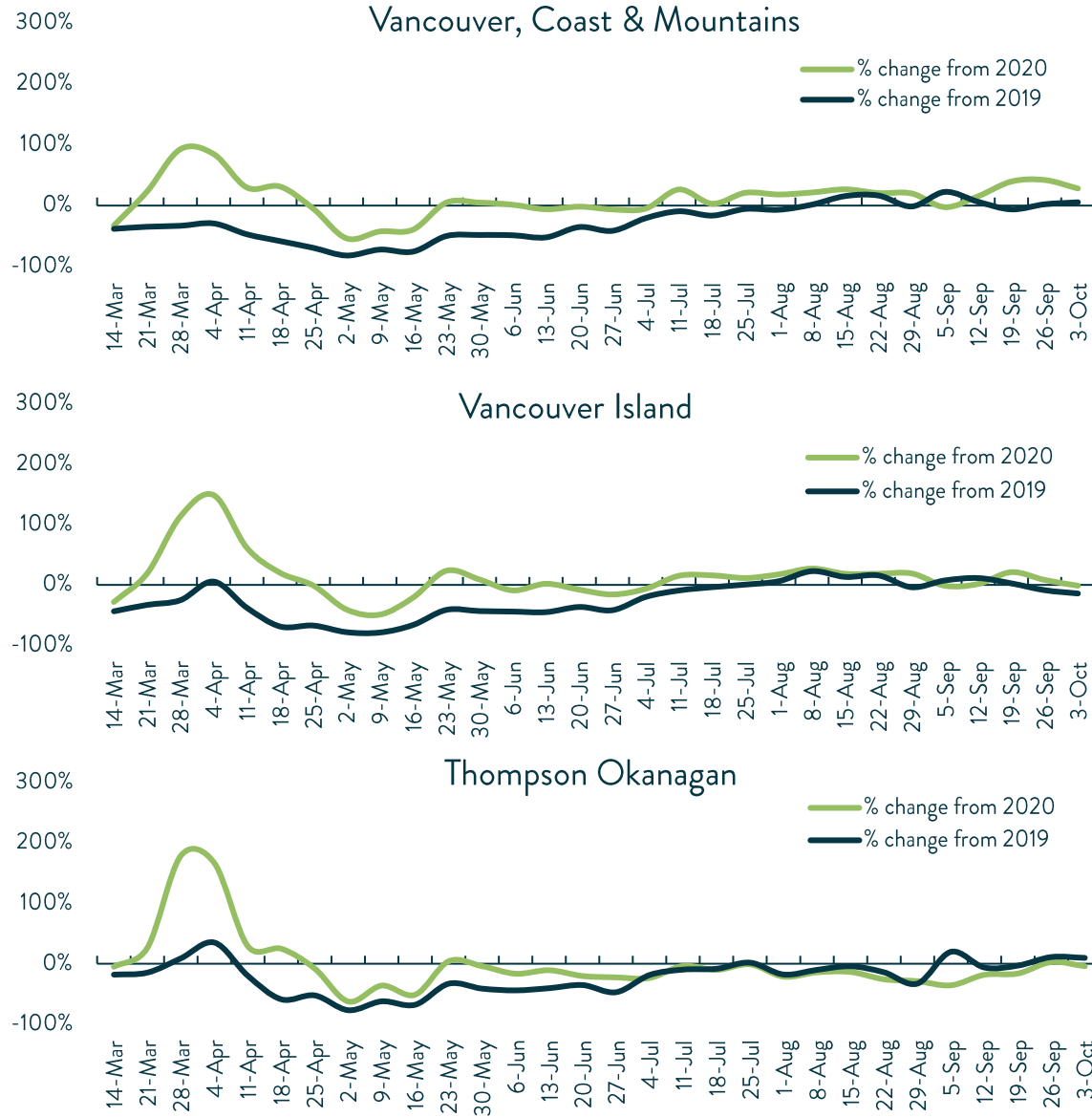
- For the week ending October 3, 2021, Environics Analytics reported that weekly domestic overnight visitation decreased -0.9% compared to the same week in 2020. Compared to the same week in 2019, weekly domestic overnight visitation decreased -2.4%.
- One of six tourism regions, Vancouver, Coast & Mountains, saw a year-over-year increase in weekly visitation when compared to the same period in 2020. Three tourism regions, Vancouver, Coast & Mountains, Thompson Okanagan, and Kootenay Rockies, saw a year-over-year increase in weekly visitation when compared to the same period in 2019.
  - Vancouver, Coast & Mountains (+28.0% over 2020; +5.4% over 2019)
  - Vancouver Island (-1.4%; -14.1%)
  - Thompson Okanagan (-4.2%; +9.7%)
  - Kootenay Rockies (-4.7%; +36.9%)
  - Cariboo Chilcotin Coast (-34.6%; -40.3%)
  - Northern BC (-35.0%; -26.0%)



Source: [Environics Analytics Weekly COVID Tracker Report, Oct 3, 2021](#)

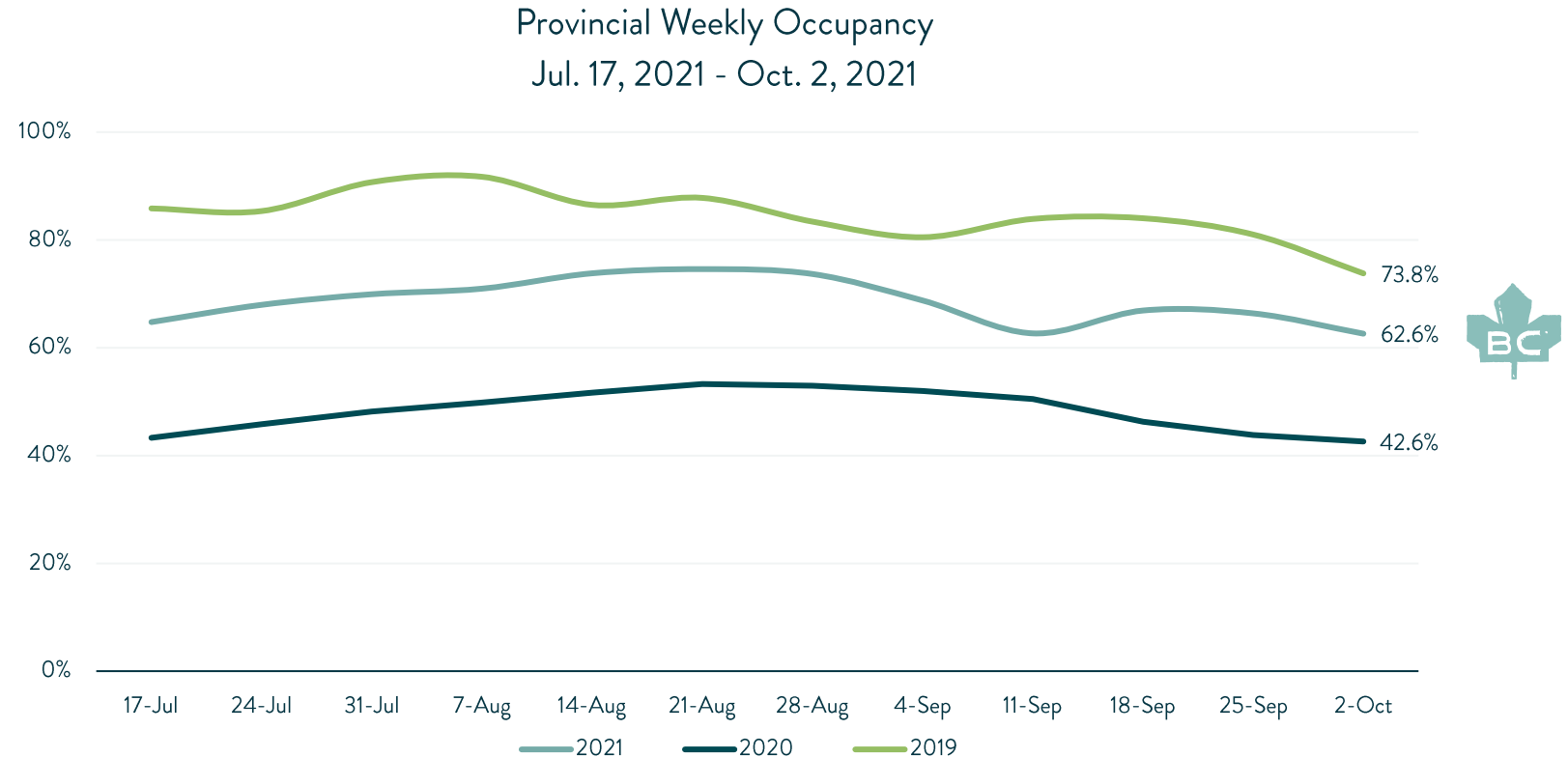


# Regional Domestic Overnight Visitation Year-over-Year Percent Change



## *BC's occupancy rate (62.6%) increased +20.0 points compared to the same period in 2020*

- STR, an agency which reports BC's hotel performance, shows the average weekly occupancy rate for BC was 62.6% for the week of September 26 – October 2, 2021. This represents a decrease of -3.8 points from the previous week.
- It also represents an increase of +20.0 points compared to a similar period in 2020 and a decrease of -11.2 points compared to a similar period in 2019.



Source: [2021 STR, STR Global Ltd, Sep 26 – Oct 2, 2021](#)

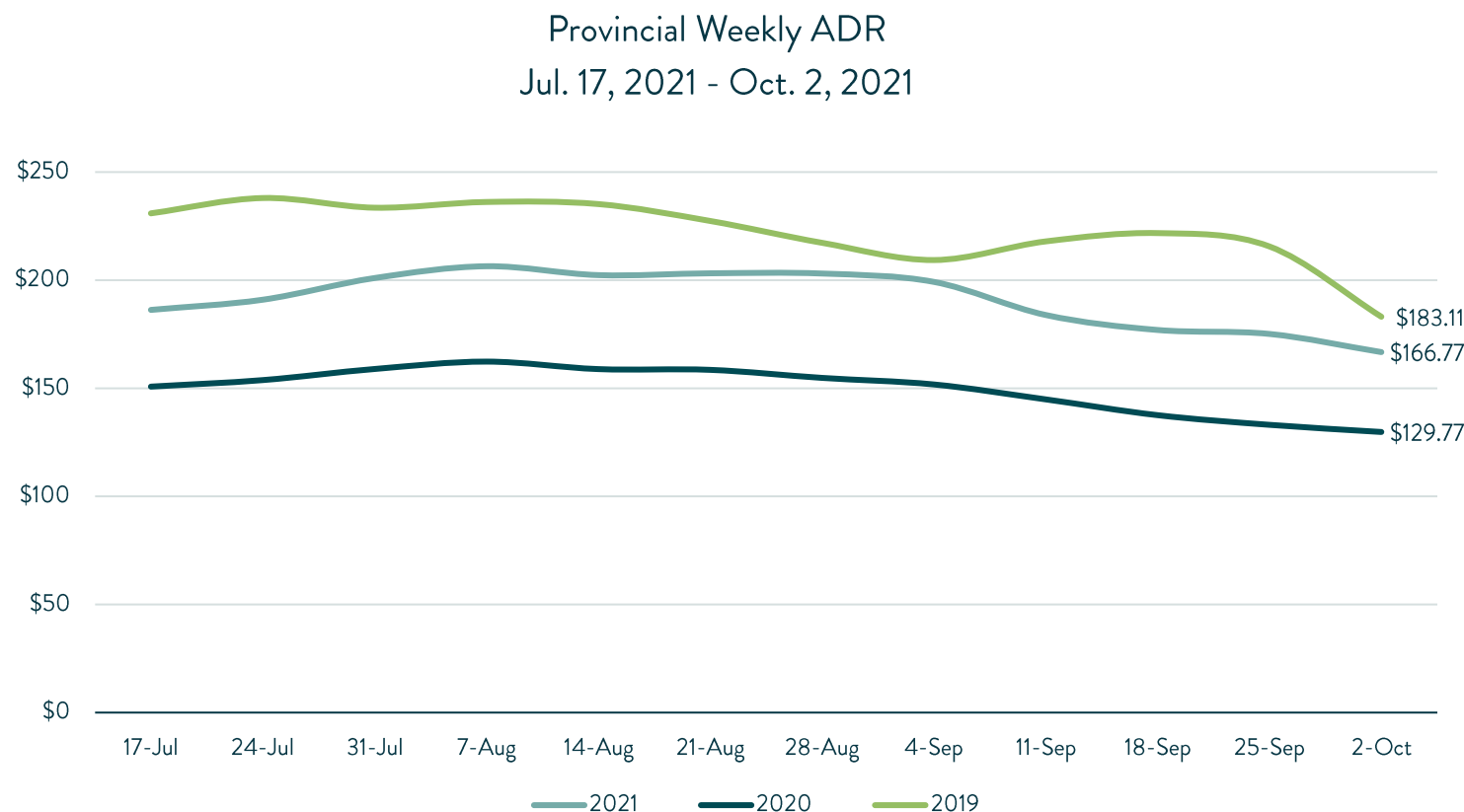
## British Columbia's Weekly Hotel Occupancy Rate

		Week-over-Week	Year-over-Year	2021 vs 2019
	Sep. 26 –Oct. 2, 2021	Sep. 26 –Oct. 2, 2021 vs. Sep. 19 - 25, 2021	Sep. 26 –Oct. 2, 2021 vs. Sep. 27 – Oct. 3, 2020	Sep. 26 –Oct. 2, 2021 vs. Sep. 29 – Oct. 5, 2019
	Occupancy Rate	Occupancy Point Change	Occupancy Point Change	Occupancy Point Change
British Columbia	62.6%	-3.8	+20.0	-11.2
Vancouver (City of)	62.3%	-5.4	+38.4	-20.7
Whistler	48.5%	+0.6	+13.5	+1.4
Victoria	62.2%	-1.9	+26.2	-20.6
Kelowna	65.0%	-3.3	+18.6	-4.5
Kamloops	82.8%	+1.2	+31.4	+15.7
Richmond	51.0%	-4.6	+18.8	-38.6
Revelstoke	51.6%	-12.4	+4.8	-7.1



## *BC's average daily rate (\$166.77) increased +28.5% compared to the same period in 2020*

- STR, an agency which reports BC's hotel performance, shows BC's average daily rate (ADR) was \$166.77 for the week of September 26 – October 2, 2021.
- This represents an increase of +28.5% compared to a similar period in 2020 and a decrease of -8.9% compared to 2019.





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

	Sep. 26 – Oct. 2, 2021 ADR	Week-over-Week Sep. 26 – Oct. 2, 2021 vs. Sep. 19 – 25, 2021 ADR Percent Change	Year-over-Year Sep. 26 – Oct. 2, 2021 vs. Sep. 27 – Oct. 3, 2020 ADR Percent Change	2021 vs 2019 Sep. 26 – Oct. 2, 2021 vs. Sep. 29 – Oct. 5, 2019 ADR Percent Change
British Columbia	\$166.77	-4.8%	+28.5%	-8.9%
Vancouver (City of)	\$210.47	-4.8%	+42.2%	-17.8%
Whistler	\$236.79	-4.9%	+28.5%	+23.9%
Victoria	\$219.17	-7.3%	+37.8%	+14.4%
Kelowna	\$153.47	-5.9%	+11.9%	+1.1%
Kamloops	\$123.01	-1.6%	+21.7%	+4.4%
Richmond	\$152.17	-3.1%	+24.0%	-18.8%
Revelstoke	\$118.31	-4.7%	+6.9%	+5.1%



## BC's RevPAR (\$104.4) decreased -10.4% from the previous week

- STR, an agency which reports BC's hotel performance, shows BC's revenue per available room (RevPAR) was \$104.44 for the week of September 26 – October 2, 2021. This represents a decrease of -10.4% from the previous week.
- BC's RevPAR showed an increase (+88.8%) for the week of September 26 – October 2, 2021 compared to a similar period in 2020 and a decrease (-22.7%) compared to 2019.
- RevPAR increased compared to a similar period in 2020 for all reported cities. RevPAR remains below 2019 levels for all reported cities except Whistler and Kamloops.

	Sep. 26 – Oct. 2, 2021	Week-over-Week Sep. 26 – Oct. 2, 2021 vs. Sep. 19 – 25, 2021	Year-over-Year Sep. 26 – Oct. 2, 2021 vs. Sep. 27 – Oct. 3, 2020
	RevPAR	RevPAR Percent Change	RevPAR Percent Change
British Columbia	\$104.44	-10.4%	+88.8%
Vancouver (City of)	\$131.21	-12.5%	+270.6%
Whistler	\$114.76	-3.8%	+78.2%
Victoria	\$136.23	-10.1%	+138.0%
Kelowna	\$99.80	-10.5%	+56.8%
Kamloops	\$101.82	-0.1%	+96.0%
Richmond	\$77.68	-11.1%	+96.2%
Revelstoke	\$61.06	-23.1%	+17.8%

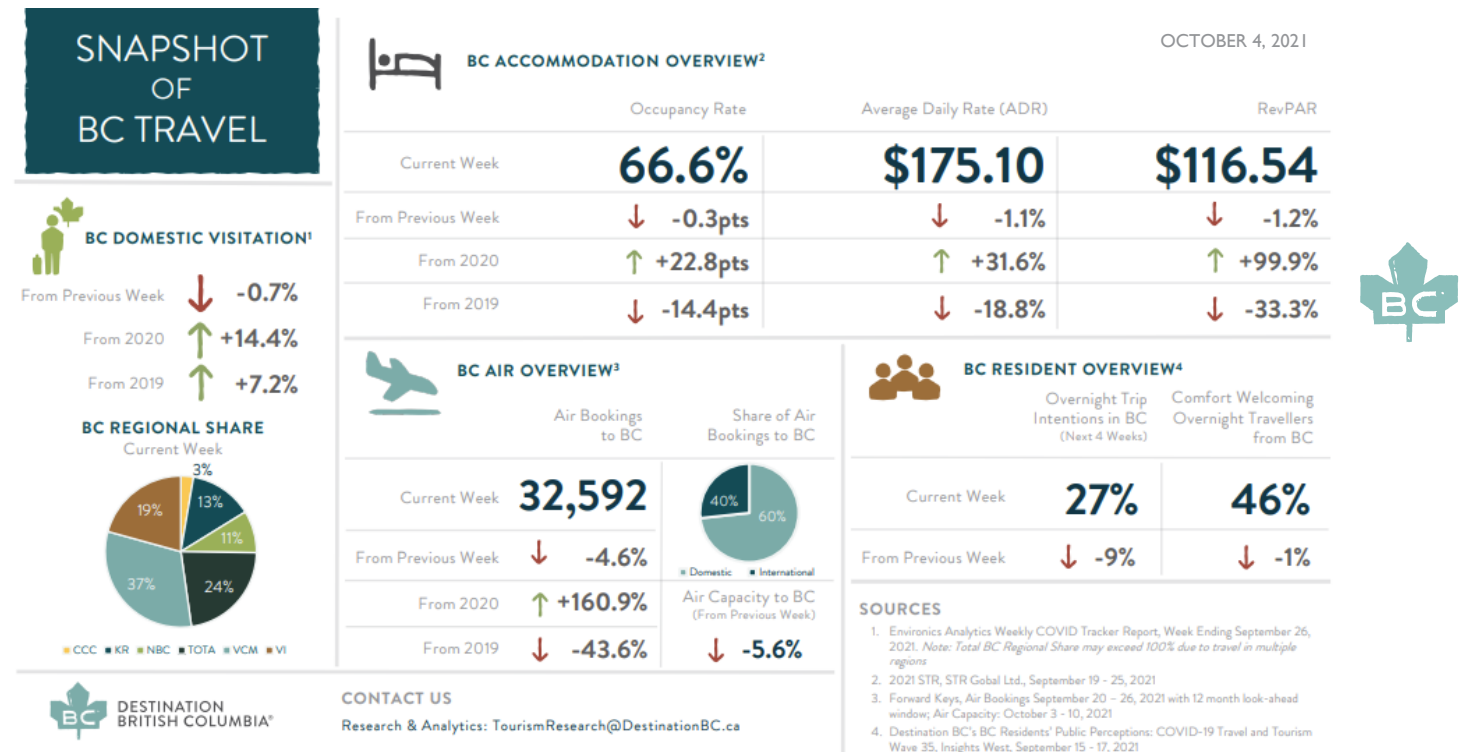


Source: [2021 STR, STR Global Ltd, Sep 26 – Oct 2, 2021](#)

# Destination BC's Snapshot of BC Travel reports that international bookings make up 40% of total BC Air Bookings for the week of September 28 - October 4

Some highlights from Destination BC's weekly [Snapshot of BC Travel](#) for the week of September 28 – October 4:

- International bookings make up 40% of total BC Air Bookings. (Forward Keys)
- BC Air Bookings are up +160.9% compared to the same period in 2020, but down -43.6% compared to the same period in 2019. (Forward Keys)
- Vancouver, Coast & Mountains and Vancouver Island regions make up 56% of BC's domestic visitation. (EnviroNics Analytics)



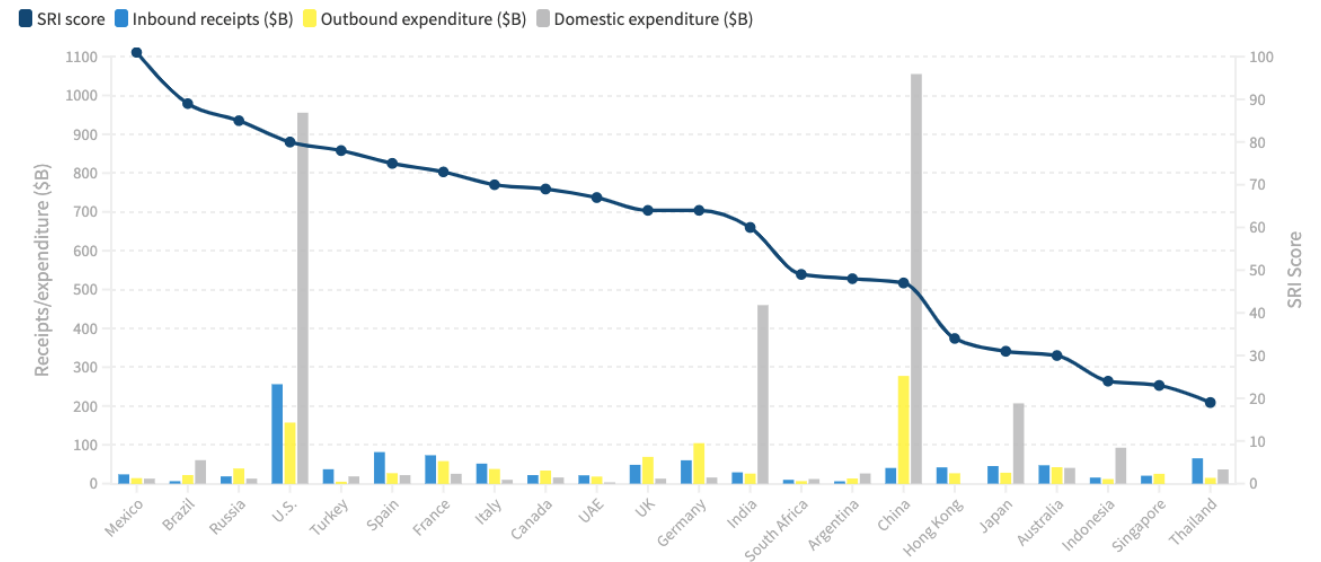
Source: [Destination BC's Snapshot of BC Travel Oct 4, 2021](#)

# Skift reports Canada's Recovery Index score reaches 68 points out of 100 in September 2021

- According to Skift, Canada's average Recovery Index, an overall index of travel performance based on factors such as car rentals, flight, and lodging, reached 68 points in September 2021. In comparison, the US has an SRI score of 82 and Australia has an SRI score of 33. This is in relation to a baseline reading out of 100 for the same time period in 2019.
- As of September 2021, the Global Recovery Index stands at 62 points.

## Tourism Output by Country

View the SRI score in relation to each country's estimated inbound receipts, outbound expenditure, and domestic expenditure.



Sources: [Skift Research estimates](#), [UNWTO](#), [World Bank](#)



**Skift**  
RESEARCH

Source: [Skift Recovery Index, Skift 2021](#)



# *Destination Analysts reports that 48.7% of US travellers consider leisure travel a high spending priority within the next 3 months*

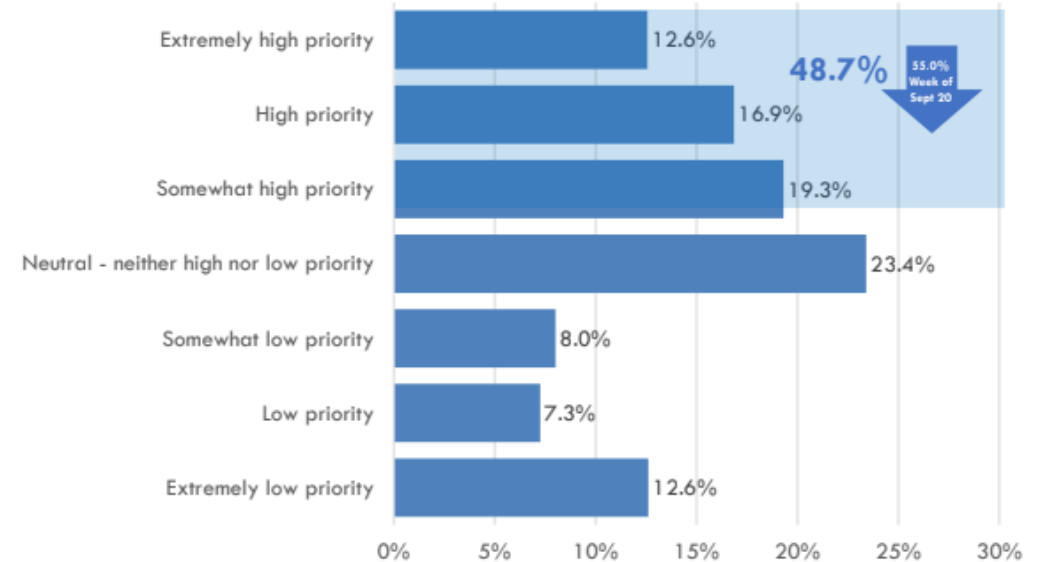
- According to Destination Analysts' latest Travel Sentiment Index (October 5, 2021), 48.7% of US travellers consider leisure travel a high spending priority within the next 3 months. This is a decrease of -6.3% from the week of September 30, 2021.
- Additionally, 23.4% of US travellers remained neutral when asked how much of a priority leisure travel will be in their budget in the next 3 months, and 27.9% of travellers have leisure travel as a low priority.

## TRAVEL AS A BUDGET PRIORITY

**Question:** Thinking carefully about how you expect to spend your income in the NEXT THREE MONTHS, please use the scale below to describe your spending priorities. (Select one)

Leisure travel will be a(n) \_\_\_\_\_

(Base: Wave 7.5 data. All respondents, 1,209 completed surveys. Data collected September 29 – October 1, 2021)



Destination Analysts  
DO YOUR RESEARCH



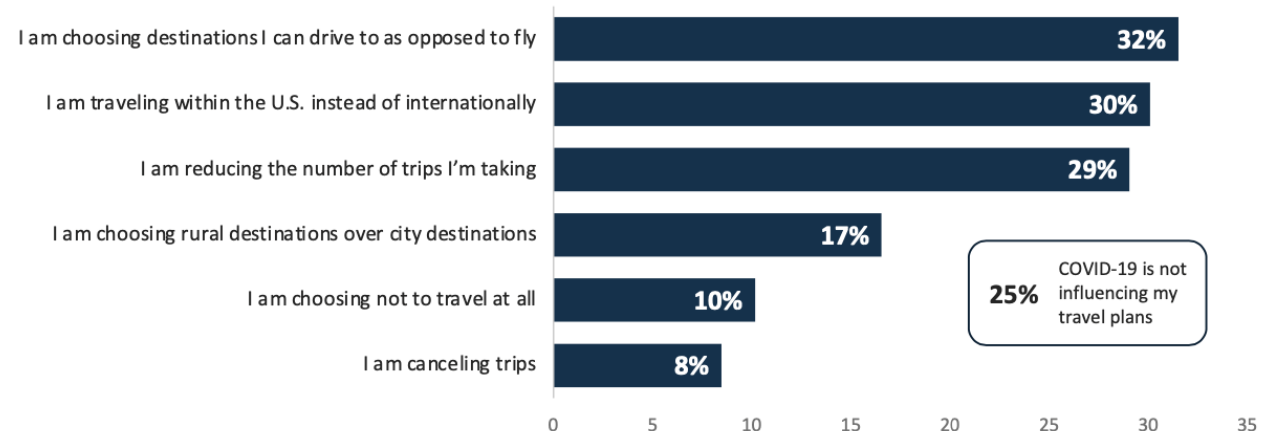
Source: [Destination Analysts Travel Sentiment Index Oct 5, 2021](#)

# Longwoods report that 25% of US travellers said that COVID-19 is not influencing their travel plans within the next 6 months

- According to Longwoods' latest COVID-19 Travel Sentiment Study (Wave 46), 25% of US travellers travel plans are not being influenced by COVID-19 in the next 6 months.
- Additionally, for the next 6 months, 32% said they are choosing destinations they can drive to, 30% said that they are travelling within the US instead of internationally, and 29% stated that they are reducing the number of trips they are taking.
- The same report showed that 10% of US travellers are choosing not to travel at all in the next 6 months and 8% are cancelling their trips.

## IMPACT ON TRAVEL PLANS

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



Travel Sentiment Study Wave 46

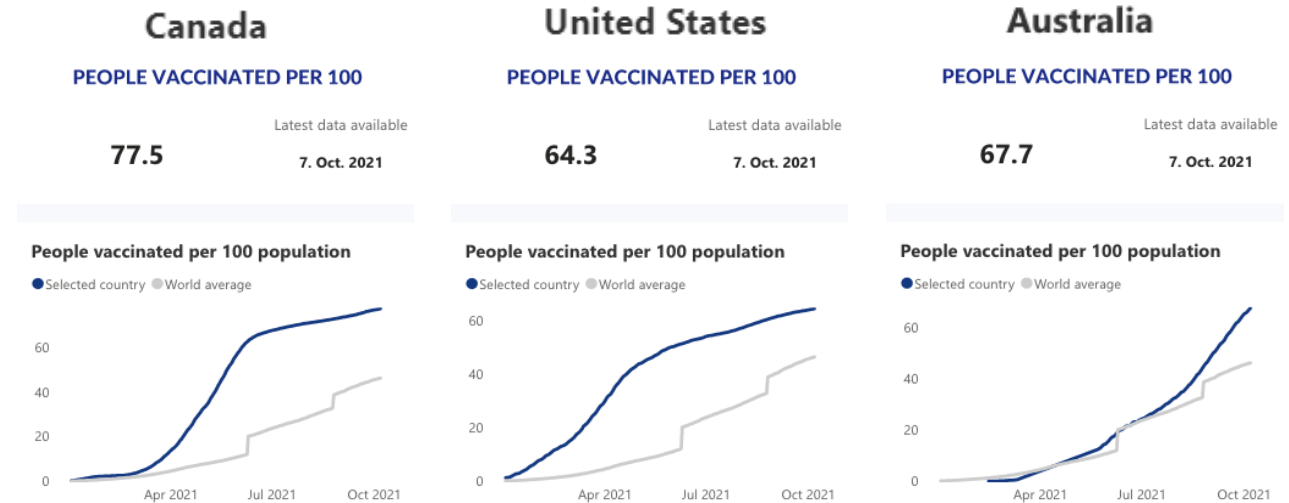
Longwoods | miles  
INTERNATIONAL PARTNERSHIP

Source: [COVID-19 Travel Sentiment Study - Wave 46](#)



# *UNWTO reports 46.3 of out every 100 people worldwide have received at least one dose of a vaccine*

- According to the UNWTO, as of October 7, 2021, the global average for vaccination rates (with at least one dose) is at 46.3 out of every 100 people.
- The same dashboard shows that as of October 7, 2021, Canada has vaccinated (with at least one dose) 77.5 out of every 100 people, compared to the US which has vaccinated 64.3 out of every 100 people, and Australia which has vaccinated 67.7 out of every 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, Oct 7, 2021](#)

# *A summary of relevant tourism headlines from around the world*

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

- [Expect vaccine passports for travel 'in the next couple of months'](#) (CTV News)
- [Canadians appear eager to take off for sun destinations despite ongoing COVID-19 challenges](#) (CBC)
- [Hilton CEO: business travel demand will eclipse 2019 levels in 3 years](#) (Skift)
- [UNWTO detects green shoots of tourism recovery over summer](#) (Breaking Travel News)





# Tourism and COVID-19 dashboard and reporting resources

- Destination BC begins publishing weekly [Snapshot of BC Travel](#) which includes information related to accommodation, air bookings, and overall domestic visitation.
- 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.
- [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.





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

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