

# COVID-19 Research Roundup

October 25, 2021

Cumberland, Vancouver Island



## *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 BC residents have a net happiness score of -7 towards advertisements of their community to other parts of Canada
- Destination BC reports that BC residents' concern for welcoming visitors from other parts of Canada decreased -5 points to 65%
- BC weekly domestic overnight visitation decreased -18.2% from the previous week
- BC sees an increase of +10.3% in weekly domestic overnight visitation compared to the same period in 2020
- BC's occupancy rate (56.8%) increased +18.1 points compared to the same period in 2020
- BC's average daily rate (\$154.50) increased +23.1% compared to the same period in 2020
- BC's RevPAR (\$87.80) decreased -7.9% from the previous week
- CBRE forecasts that BC's Occupancy rate, ADR and RevPAR will all grow in 2022
- Destination Insights with Google reports that international air travel demand to Canada has increased +233% compared to the same period in 2020
- Skift reports that 71% of US travellers expect their remaining trips in 2021 to be done by car within the US
- Destination Analysts reports that 28% of US travellers are not travelling during this holiday season due to fear of COVID-19
- UNWTO reports 48.4 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 BC residents have a net happiness score of -7 towards advertisements of their community to other parts of Canada

- In Destination Canada's latest Resident Sentiment report (October 12, 2021), BC residents had a net happiness score of -7 when asked to describe their sentiment towards advertisements of their community to other parts of Canada. In comparison, Alberta had a net happiness score of +35 for advertisements of their community to other parts of Canada, whereas Ontario had a net happiness score of +16.
- The same report showed that BC residents had a net happiness score of +17 when asked to describe their sentiment towards advertisements of their community to other parts of the province.

## Comparison by Region / Comparaison par région

Net level of happiness / Niveau net de satisfaction <sup>1</sup>	BC/C.-B. (n=208)	AB/Alb. (n=203)	SK/MB Sask./Man. (n=201)	ON/Ont. (n=617)	QC/Qc (n=415)	ATL (n=202)
From other communities near me / ... de communautés voisines	+27	+44	+27	+32	+51	+53
From other parts of my province / ... d'autres parties de ma province	+17	+39	+25	+30	+50	+48
From other parts of Canada / ... d'autres régions du Canada	-7	+35	+7	+16	+41	+11
From the United States / ... des États-Unis	-33	+3	-17	-23	+8	-39
From other countries / ... d'autres pays	-30	-1	-17	-23	+7	-36

■ Net positive / Niveau net positif  
■ Net negative / Niveau net négatif  
■ Net neutral / Niveau net neutre

<sup>1</sup> Net level of happiness is equal to the total of Very happy and Happy less the total of Very unhappy and Unhappy.  
 How would you feel if you saw an advertisement today promoting your community to each of the following regions as a place for visitors to come when it is safe?

<sup>1</sup> Le niveau net de satisfaction est égal au total de répondants se disant « très contents » et « contents » moins le total de ceux se disant « très mécontents » ou « mécontents ».  
 Comment vous sentiriez-vous si vous voyiez aujourd'hui une publicité faisant la promotion de votre communauté comme un endroit où les visiteurs des régions suivantes peuvent venir lorsqu'il sera sécuritaire de le faire?



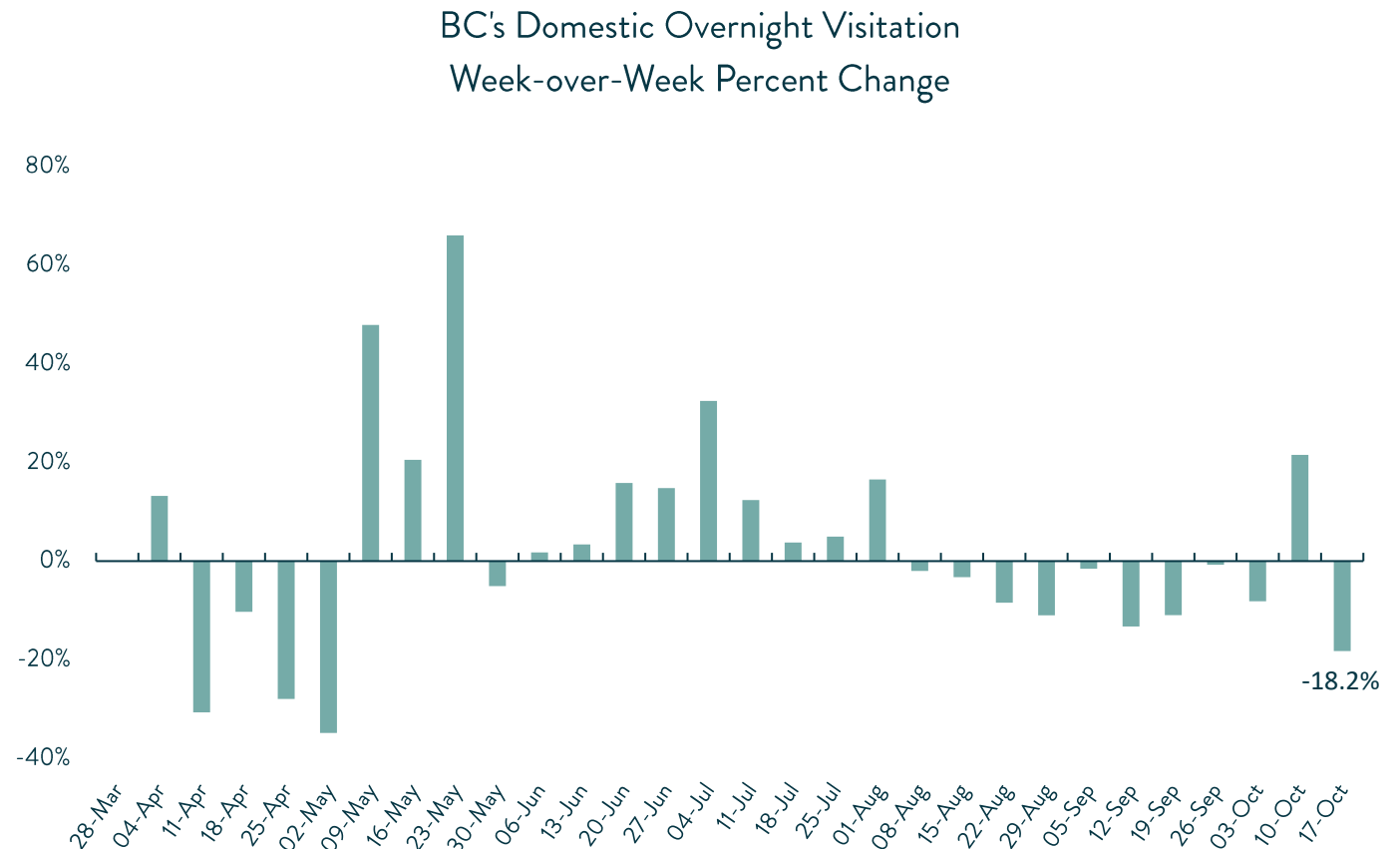
Source: [Destination Canada's Weekly COVID-19 Resident Sentiment, Oct 12, 2021](#)

- In Destination BC's latest BC Residents' Public Perceptions Wave 37 (October 13, 2021) report, an estimated 65% of British Columbian residents stated they would be concerned welcoming visitors from other parts of Canada, a decrease of -5 points from the previous wave (September 29, 2021).
- Additionally, concern for welcoming visitors from nearby communities for a day trip decreased -2 points to 38%, and concern for welcoming visitors from elsewhere in BC for an overnight trip fell -2 points to 49%.
- BC residents' concern for welcoming visitors from the US and from other countries both fell -2 points to 75% and 79%, respectively.



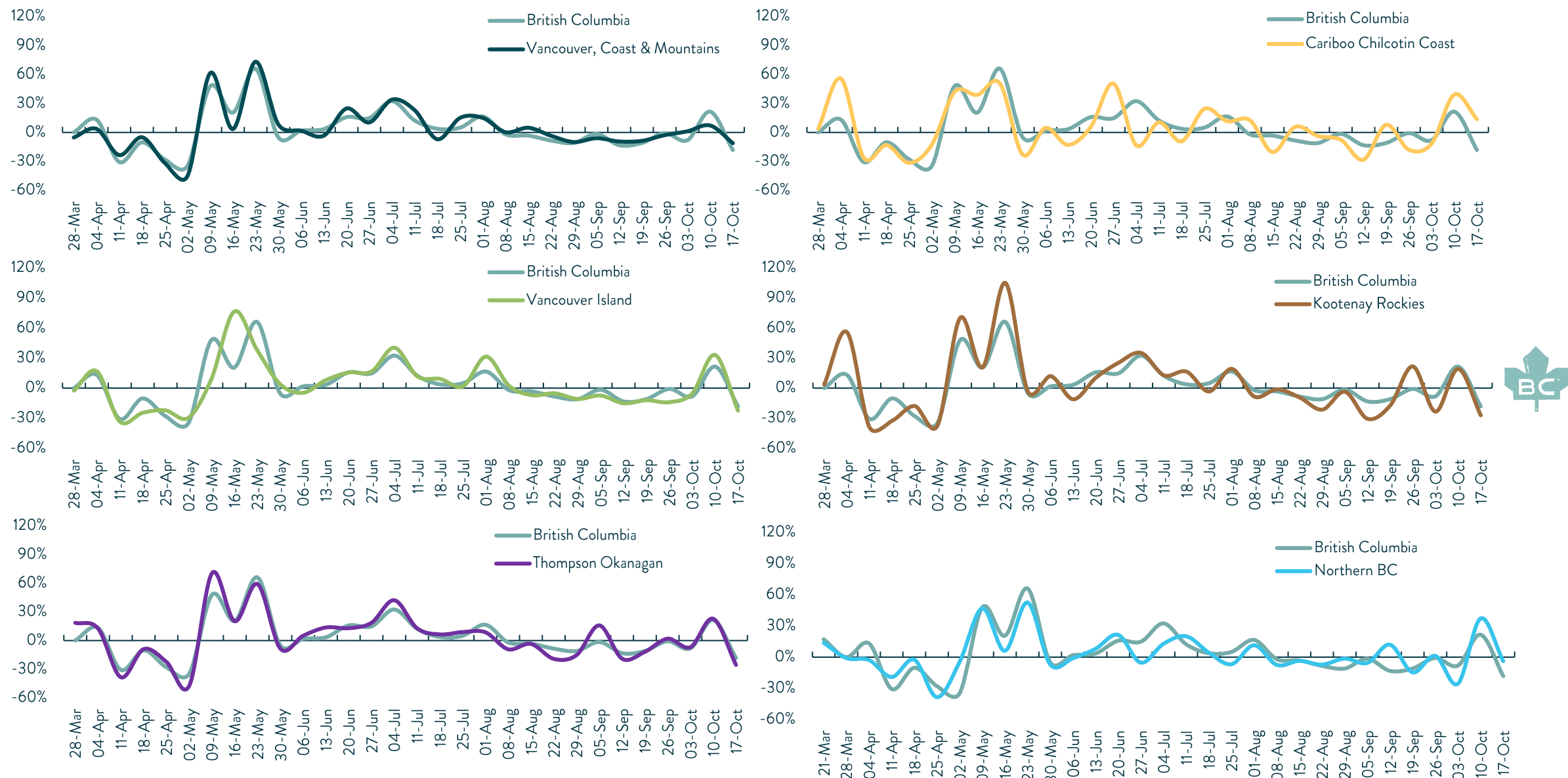
# BC weekly domestic overnight visitation decreased -18.2% from the previous week

- According to Environics Analytics Weekly COVID Tracker Report, during the week ending September October 17, 2021, BC experienced a week-over-week decrease of -18.2% in weekly domestic overnight visitation, likely in part due to the long weekend the previous week.
- Week-over-week increases in domestic overnight visitation was seen in one of six tourism regions across the province:
  - Cariboo Chilcotin Coast (+13.7%)
- Week-over-week decreases in domestic overnight visitation were seen in the other five tourism regions:
  - Northern BC (-4.0%)
  - Vancouver, Coast & Mountains (-11.1%)
  - Vancouver Island (-22.5%)
  - Thompson Okanagan (-25.5%)
  - Kootenay Rockies (-27.2%)



Source: [Environics Analytics Weekly COVID Tracker Report, Oct 17, 2021](#)

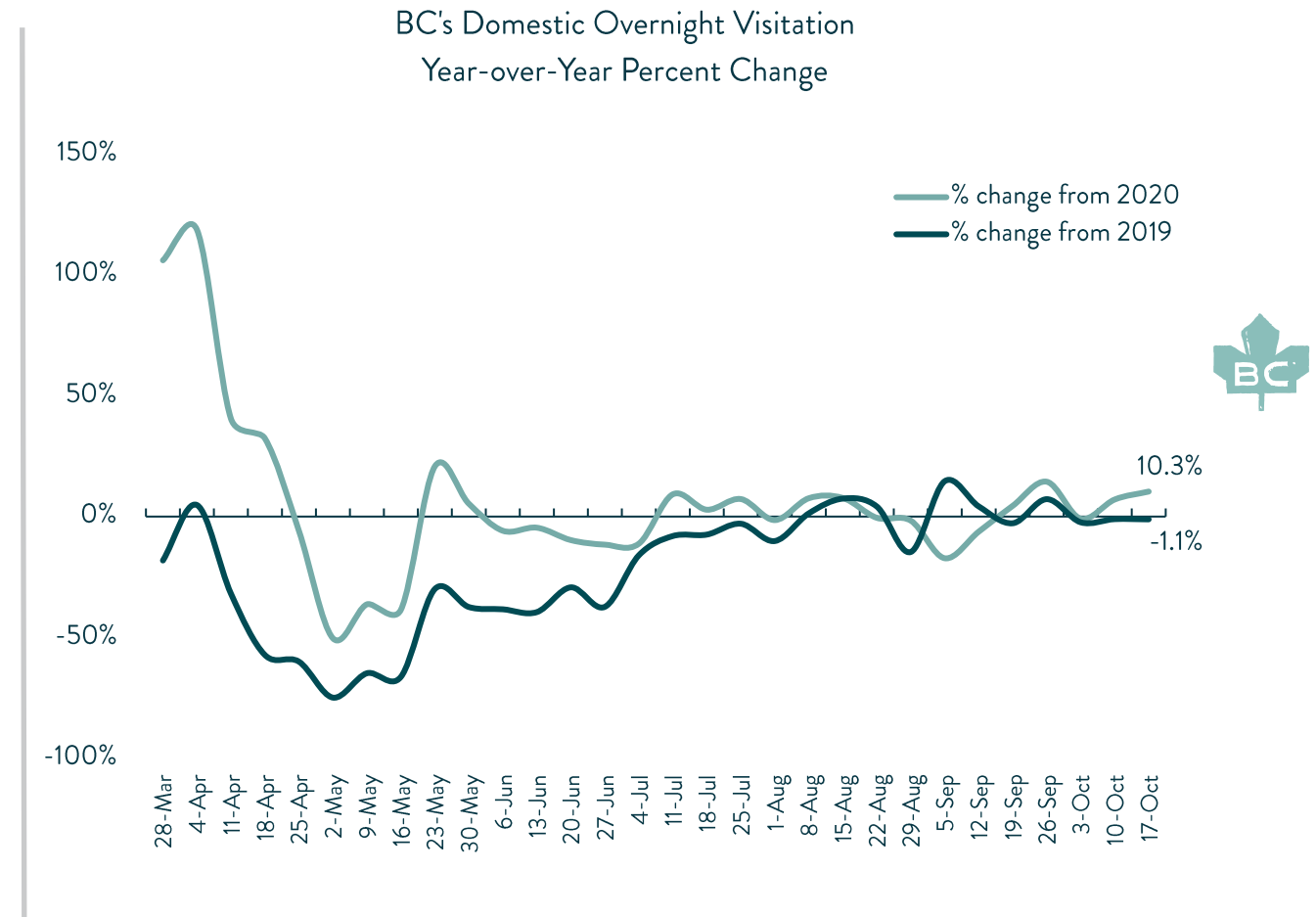
# BC and Regional Domestic Overnight Visitation Week-over-Week Percent Change





# BC sees an increase of +10.3% in weekly domestic overnight visitation compared to the same period in 2020

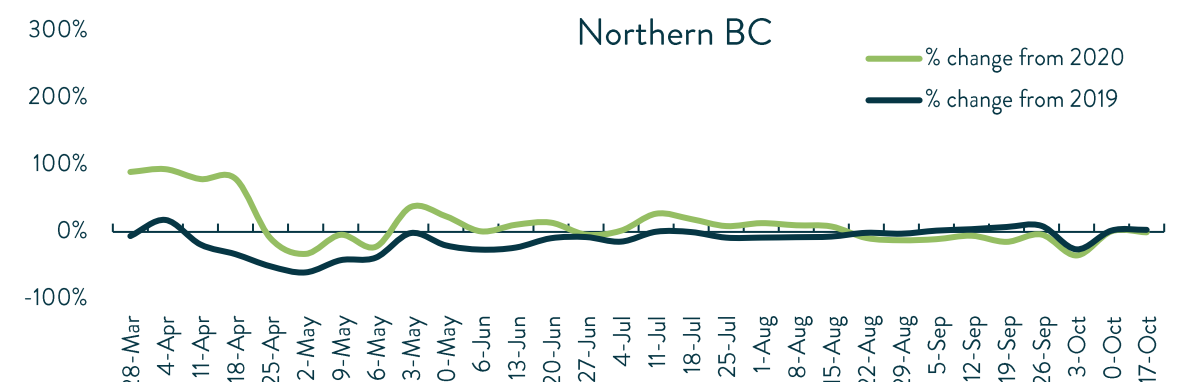
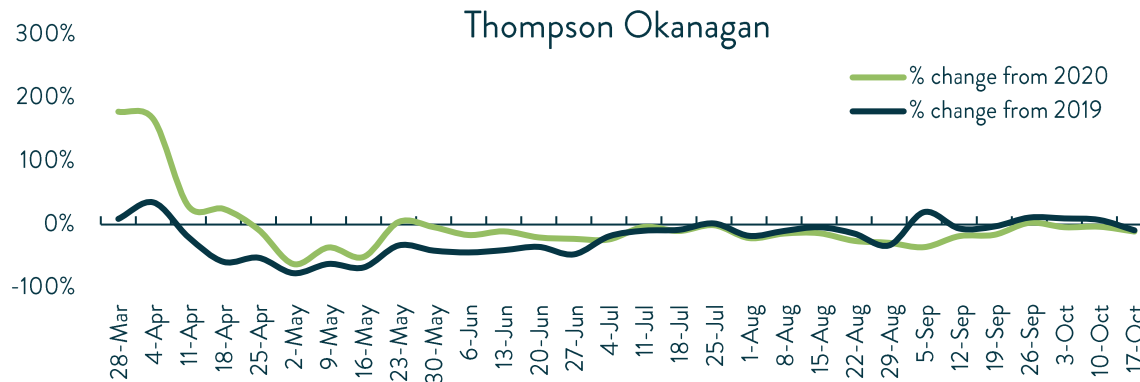
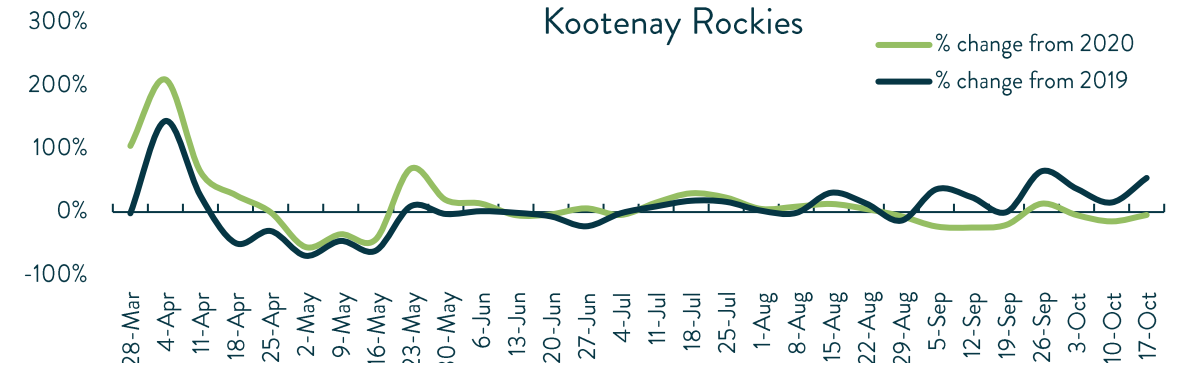
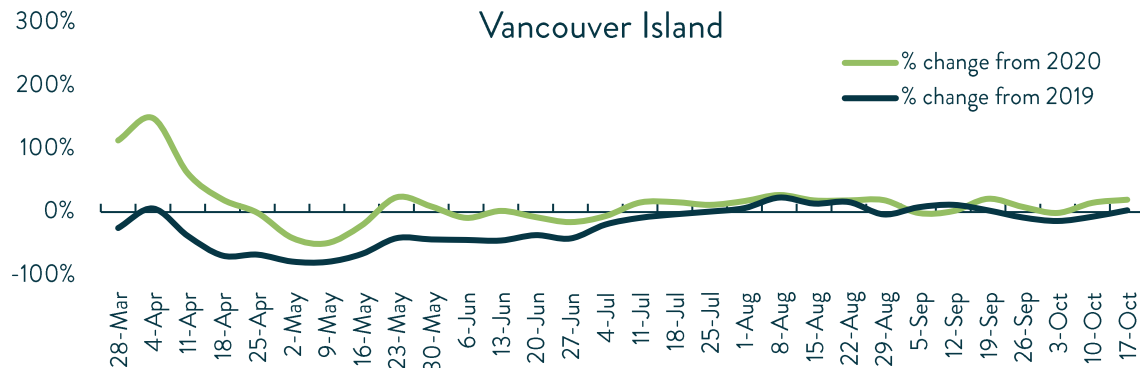
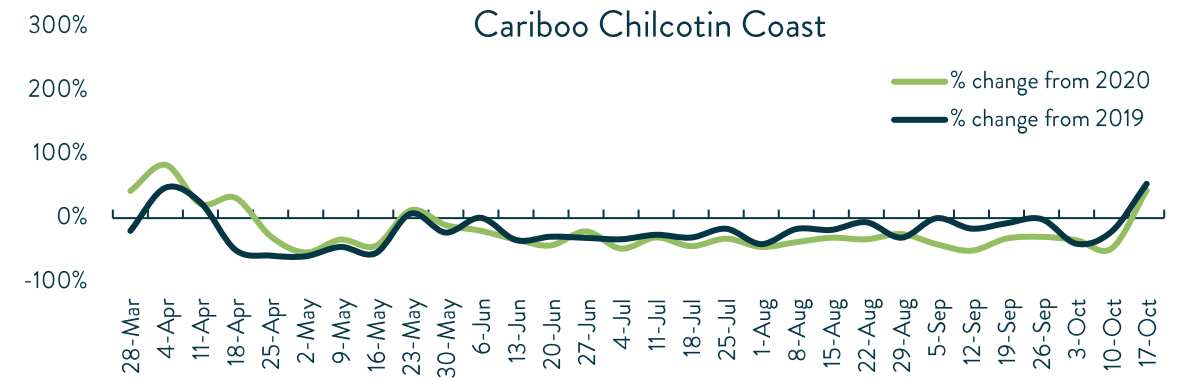
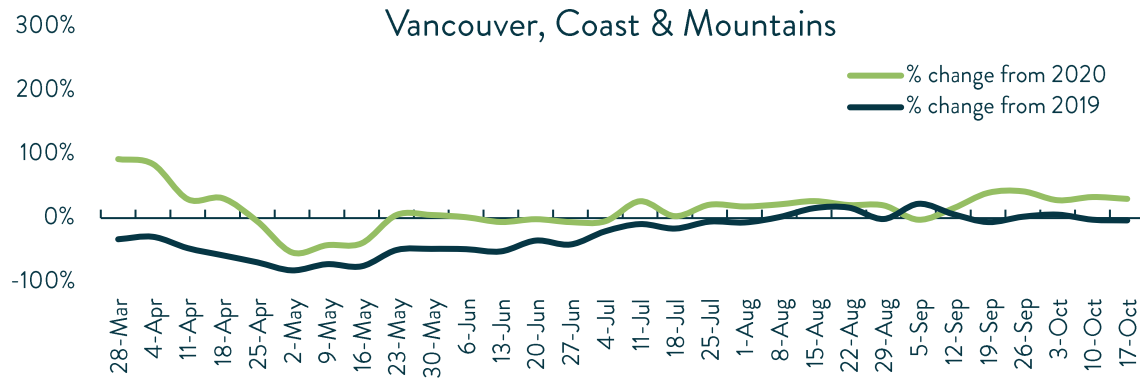
- For the week ending October 17, 2021, Environics Analytics reported that weekly domestic overnight visitation increased +10.3% compared to the same week in 2020. Compared to the same week in 2019, weekly domestic overnight visitation decreased -1.1%.
- Three of six tourism regions, Cariboo Chilcotin Coast, Vancouver, Coast & Mountains, and Vancouver Island, saw a year-over-year increase in weekly visitation when compared to the same period in 2020. All but two tourism regions, Vancouver, Coast & Mountains, and Thompson Okanagan, saw a year-over-year increase in weekly visitation when compared to the same period in 2019.
  - Cariboo Chilcotin Coast (+43.6% over 2020; +53.8% over 2019)
  - Vancouver, Coast & Mountains (+30.2%; -3.7%)
  - Vancouver Island (+19.5%; +2.8%)
  - Northern BC (-0.7%; +3.1%)
  - Kootenay Rockies (-4.6%; +54.0%)
  - Thompson Okanagan (-11.1%; -9.1%)



Source: [Environics Analytics Weekly COVID Tracker Report, Oct 17, 2021](#)

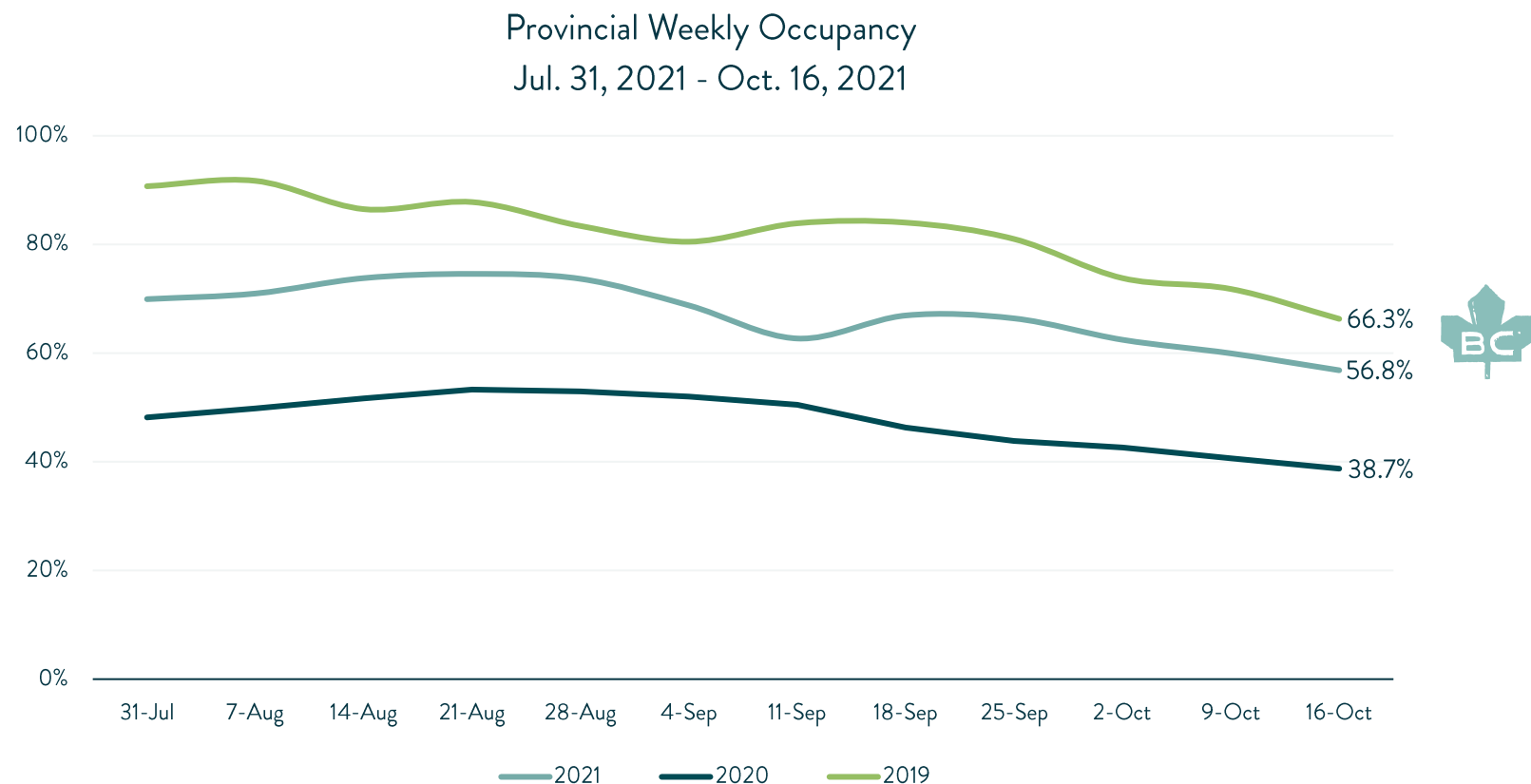


# Regional Domestic Overnight Visitation Year-over-Year Percent Change



## BC's occupancy rate (56.8%) increased +18.1 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 56.8% for the week of October 10 - 16, 2021. This represents a decrease of -3.1 points from the previous week.
- It also represents an increase of +18.1 points compared to a similar period in 2020 and a decrease of -9.5 points compared to a similar period in 2019.



Source: [2021 STR, STR Global Ltd, Oct 10 - 16, 2021](#)

## British Columbia's Weekly Hotel Occupancy Rate

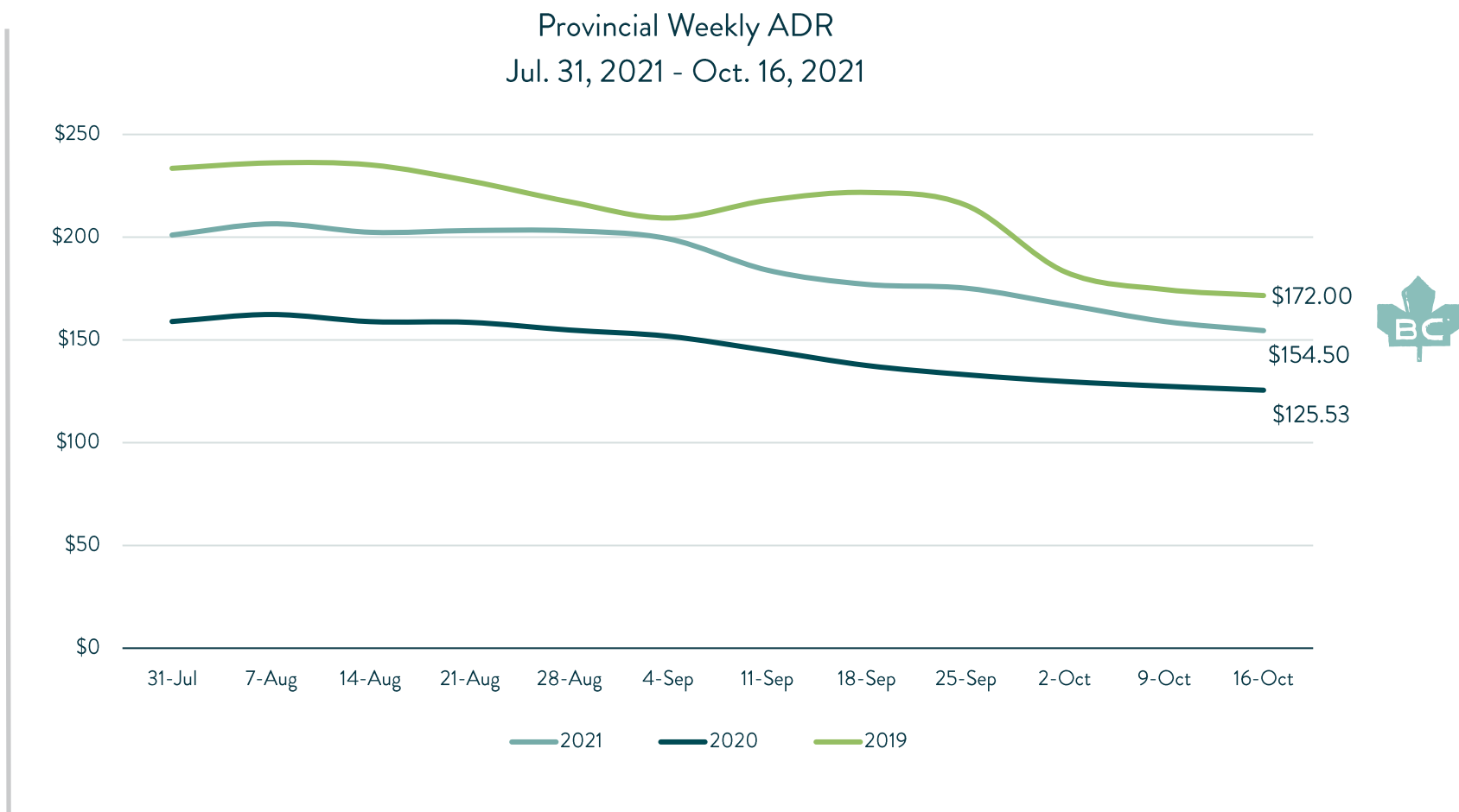
	Oct. 10 - 16, 2021 Occupancy Rate	Week-over-Week Oct. 10 - 16, 2021 vs. Oct. 3 - 9, 2021 Occupancy Point Change	Year-over-Year Oct. 10 - 16, 2021 vs. Oct. 11 - 17, 2020 Occupancy Point Change	2021 vs 2019 Oct. 10 - 16, 2021 vs. Oct. 13 - 19, 2019 Occupancy Point Change
British Columbia	56.8%	-3.1	+18.1	-9.5
Vancouver (City of)	56.8%	-0.8	+32.0	-21.7
Whistler	40.6%	-3.7	+6.0	-2.8
Victoria	58.7%	-2.3	+22.1	-8.1
Kelowna	55.8%	-6.7	+16.7	-10.1
Kamloops	70.4%	-7.4	+20.9	+16.1
Richmond	52.4%	-0.8	+19.2	-28.2
Revelstoke	36.6%	-8.5	-0.6	-16.8





## *BC's average daily rate (\$154.50) increased +23.1% compared to the same period in 2020*

- STR, an agency which reports BC's hotel performance, shows BC's average daily rate (ADR) was \$154.50 for the week of October 10-16, 2021.
- This represents an increase of +23.1% compared to a similar period in 2020 and a decrease of -10.0% compared to 2019.



Source: [2021 STR](#), [STR Global Ltd](#), [STR Oct 10 - 16, 2021](#)

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

	Oct. 10 - 16, 2021	Week-over-Week Oct. 10 - 16, 2021 vs. Oct. 3 - 9, 2021	Year-over-Year Oct. 10 - 16, 2021 vs. Oct. 11 - 17, 2020	2021 vs 2019 Oct. 10 - 16, 2021 vs. Oct. 13 - 19, 2019
	ADR	ADR Percent Change	ADR Percent Change	ADR Percent Change
British Columbia	\$154.50	-2.8%	+23.1%	-10.0%
Vancouver (City of)	\$188.69	-2.9%	+27.4%	-20.5%
Whistler	\$234.02	-6.8%	+21.1%	+18.7%
Victoria	\$197.13	-3.9%	+34.3%	+22.1%
Kelowna	\$132.16	-8.2%	+9.1%	-7.0%
Kamloops	\$116.02	-2.4%	+18.4%	+6.9%
Richmond	\$144.66	-3.7%	+22.1%	-15.5%
Revelstoke	\$111.12	-4.4%	+2.6%	+2.2%



## BC's RevPAR (\$87.80) decreased -7.9% from the previous week

- STR, an agency which reports BC's hotel performance, shows BC's revenue per available room (RevPAR) was \$87.80 for the week of October 10-16, 2021. This represents a decrease of -7.9% from the previous week.
- BC's RevPAR showed an increase of +80.5% for the week of October 10-16, 2021 compared to a similar period in 2020 and a decrease of -22.8% 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, Victoria, and Kamloops.

	Oct. 10 - 16, 2021	Week-over-Week Oct. 10 - 16, 2021 vs. Oct. 3 - 9, 2021	Year-over-Year Oct. 10 - 16, 2021 vs. Oct. 11 - 17, 2020
	RevPAR	RevPAR Percent Change	RevPAR Percent Change
British Columbia	\$87.80	-7.9%	+80.5%
Vancouver (City of)	\$107.16	-4.2%	+192.2%
Whistler	\$95.04	-14.6%	+42.0%
Victoria	\$115.70	-7.5%	+115.6%
Kelowna	\$73.74	-18.1%	+55.9%
Kamloops	\$81.66	-11.7%	+68.5%
Richmond	\$75.87	-5.2%	+92.8%
Revelstoke	\$40.66	-22.5%	+0.8%



Source: [2021 STR, STR Global Ltd, Oct 10 -16, 2021](#)



# CBRE forecasts that BC's Occupancy rate, ADR and RevPAR will all grow in 2022

- According to CBRE's 2022 Market Outlook, Canadian Accommodation Sector report, British Columbia's Occupancy Rate, ADR, and RevPAR are all predicted to grow in 2022. These are the primary metrics used to determine hotel performance.
- British Columbia's hotel room occupancy is projected to increase +12 points to 56%. ADR (the Average Daily Rate for BC's hotel rooms) is projected to increase +8.0% to \$167. Lastly, RevPAR (Revenue Per Available Room) growth is projected to increase +38.7% to \$94.
- The same report showed that British Columbia's hotel room supply (the number of available rooms) is projected to increase +1.2% in 2022.

BRITISH COLUMBIA 2021-2022 OUTLOOK						CBRE HOTELS The World's Leading Hotel Experts.	
Demand Growth		ADR Growth		RevPAR Growth			
2020 Actual	-47.4%	2020 Actual	-24.0%	2020 Actual	-60.1%		
2021 Forecast	18.0%	2021 Forecast	6.0%	2021 Forecast	24.3%		
2022 Projection	30.0%	2022 Projection	8.0%	2022 Projection	38.7%		
		2019	2020	2021 F	2022 P		
Occupancy		71%	37%	44%	56%		
ADR		\$192	\$146	\$155	\$167		
RevPAR		\$136	\$54	\$68	\$94		

Source: CBRE Hotels' Trends in the Hotel Industry National Market with reproduction and use of information subject to CBRE Limited Disclaimer | Terms of Use as detailed at <https://www.cbre.ca/en/real-estate-services/business-line/valuation-and-advisory-services/hotels-valuation-and-advisory-services/disclaimer>

33

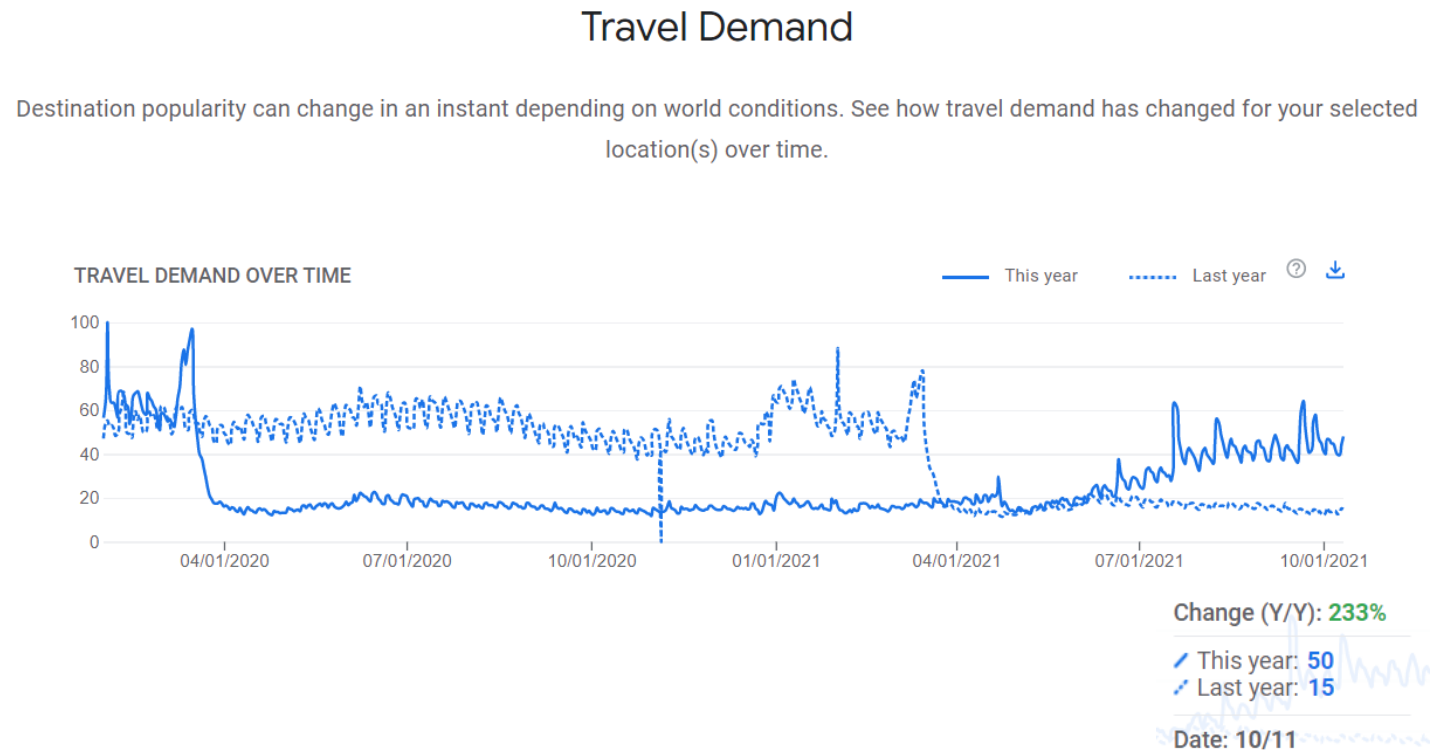
CBRE HOTELS | 2022 MARKET OUTLOOK



Source: [2022 Market Outlook, Canadian Accommodation Sector, September 2021](#)

# *Destination Insights with Google reports that international air travel demand to Canada has increased +233% compared to the same period in 2020*

- According to Destination Insights with Google, as of October 11, 2021, international air demand to Canada has risen +233% compared to a similar period in 2020, up to 50 out of a total travel demand base index of 100.
- Within Canada, Toronto has the highest international air demand by destination city, with Vancouver in second and Montreal third.



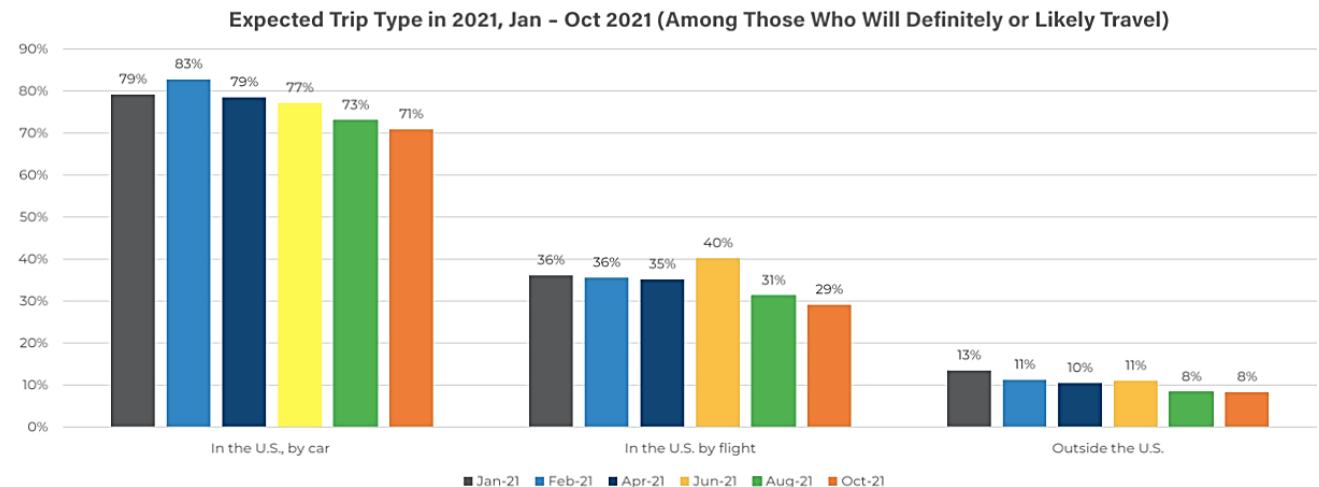
Source: [Destination Insights with Google Monitoring Travel Trends October 2021](#)

# Skift reports that 71% of US travellers expect their remaining trips in 2021 to be done by car within the US

- According to the Skift's Travel Tracker September Highlights, 71% of Americans who said they would likely travel in the remainder of 2021, expect to travel by car. This represents a decrease of -2 points since August 2021.
- Additionally, 29% of US travellers expect to fly in the US for a remaining trip in 2021, and 8% expect to travel outside the US.

## Interest in Road Trips Remained Dominant, and Air Travel Expectation Declined

- 71% of Americans expected their trips for the rest of 2021 to be by car, slightly lower than in August.
- Air travel expectation continued to drop after reaching 40% in June.
- The number of Americans planning to take international trips for the rest of 2021 remained unchanged, at 8%.



Monthly n = ~1000  
Source: Skift Research, October 2021

21

Source: [Skift Travel Tracker September Highlights](#)



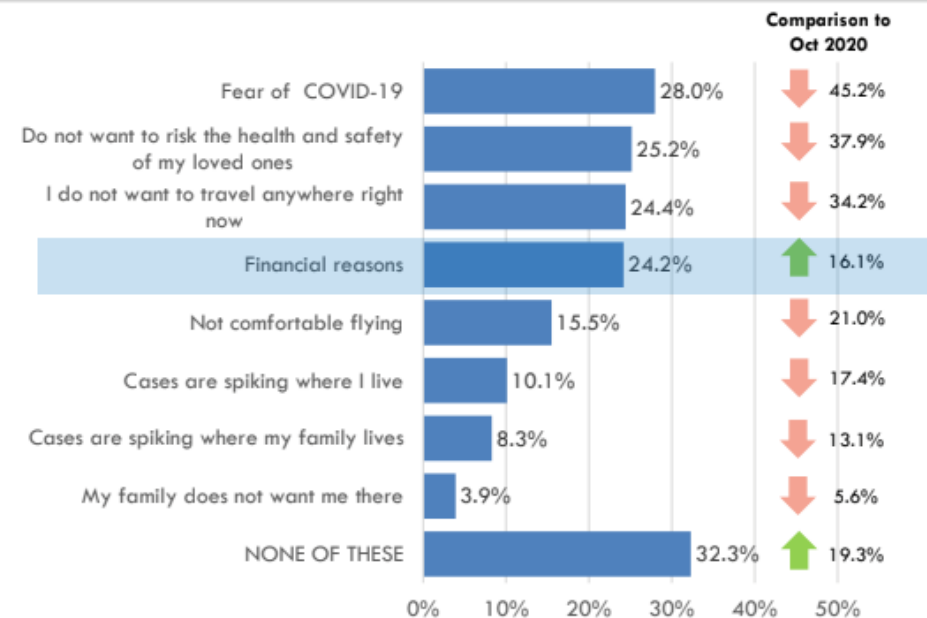
# Destination Analysts reports that 28% of US travellers are not travelling during this holiday season due to fear of COVID-19

- According to Destination Analysts' latest Travel Sentiment Index (October 5, 2021), 28.0% of US travellers won't travel this holiday season because of COVID-19. This is a decrease of -45.2% compared to last year's response for the same question.
- Other key reasons for not travelling this holiday season include jeopardizing a loved one's safety (25.2%), not wanting to travel now (24.4%), financial reasons (24.2%), not comfortable flying (15.5%), cases spiking at where they live (10.1%), and cases spiking at travel destination (8.3%). Financial reasons are the only factor for not travelling that has increased in importance compared to the 2020 holiday season.

## REASONS FOR NOT TRAVELING THIS HOLIDAY SEASON

**Question: Which best describes why you won't travel for the holiday season this year? (Select all that apply)**

(Base: Wave 76 data. All respondents planning not to travel for the holidays, 672 completed surveys. Data collected October 13-15, 2021)



Destination Analysts  
10 YEAR RESEARCH

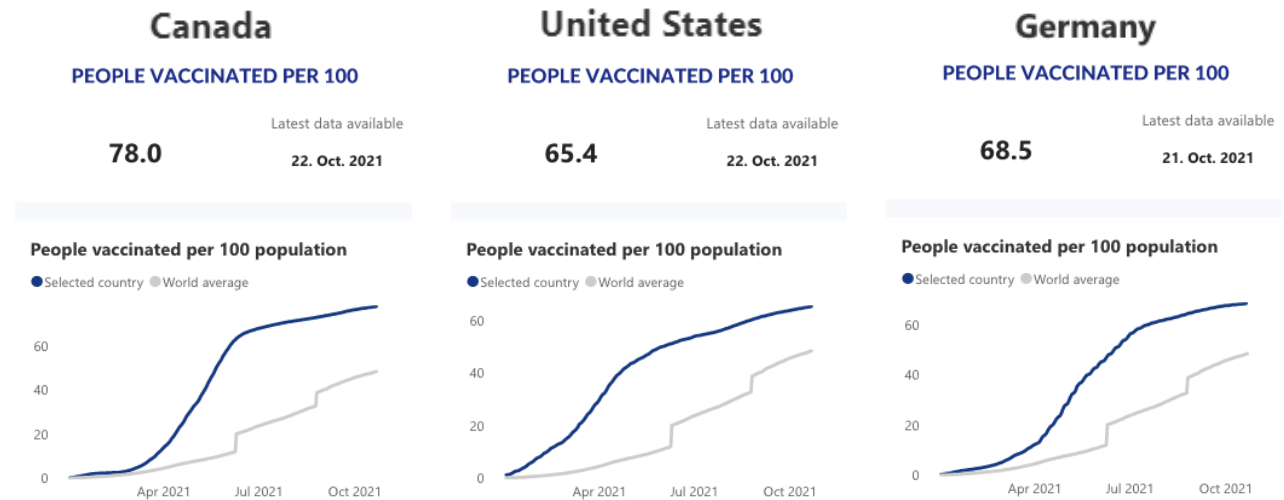
PAGE 51

Source: [Destination Analysts Travel Sentiment Index Oct 19, 2021](#)



# *UNWTO reports 48.4 of out every 100 people worldwide have received at least one dose of a vaccine*

- According to the UNWTO, as of October 22, 2021, the global average for vaccination rates (with at least one dose) is at 48.4 out of every 100 people.
- The same dashboard shows that as of October 22, 2021, Canada has vaccinated (with at least one dose) 78.0 out of every 100 people compared to the US which has vaccinated 65.4 out of every 100 people, and Germany which has vaccinated 68.5 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 23, 2021](#)

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

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

- [Canadian tourism industry welcomes lifting of non-essential travel advisory](#) (Global News)
- [Air Canada partners with federal tourism agency plan to lure U.S. frequent fliers](#) (Global News)
- [B.C. lifting COVID-19 capacity limits on gatherings for much of province](#) (Global 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 BRITISH COLUMBIA®

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

Research & Analytics  
[TourismResearch@DestinationBC.ca](mailto:TourismResearch@DestinationBC.ca)