

COVID-19 Research Roundup

November 22, 2021

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 76% of BC residents feel safe travelling to other communities in their province
- Destination BC reports that 84% of BC residents are comfortable visiting outdoor tourist attractions
- BC weekly domestic overnight visitation increased +7.4% from the previous week
- BC sees an increase of +20.8% in weekly domestic overnight visitation compared to the same period in 2019
- BC's occupancy rate (56.5%) increased +24.5 points compared to the same period in 2020
- BC's average daily rate (\$155.22) increased +30.6% compared to the same period in 2020
- BC's RevPAR (\$87.66) increased +17.5% from the previous week
- Destination BC's Snapshot of BC Travel reports that international bookings made up 36% of total BC Air Bookings for the week of Nov. 9 – 15
- Conference Board of Canada reports that 86% of Canadians miss travel
- Destination Analysts reports that 48.6% of US travellers are confident in their ability to travel safely
- Skift reports the Global Recovery Index has increased to 64 points out of 100 in September 2021
- Expedia reports that business travel increased +110% compared to the same time period in 2020
- UNWTO reports 52.6% of the global population has 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 76% of BC residents feel safe travelling to other communities in their province

- In Destination Canada's latest Resident Sentiment report (November 9, 2021), 76% of BC residents reported feeling safe to travel to other communities in their province. Additionally, 84% of BC residents feel safe travelling to nearby communities and 51% feel safe travelling to other provinces.
- The same report showed that 76% of Alberta residents, 62% of Ontario residents, 61% of Quebec residents, 59% of Saskatchewan/Manitoba residents, and 50% of Atlantic province residents feel safe travelling to other provinces.

Comparison by Region / Comparaison par région I feel safe to travel / Je me sens à l'aise de voyager

% Somewhat / Strongly Agree % Tout à fait d'accord / Plutôt d'accord	BC/C.-B. (n=215)	AB/Alb. (n=205)	SK/MB Sask./Man. (n=213)	ON/Ont. (n=612)	QC/Qc (n=418)	ATL (n=202)
Communities near me / ... dans des communautés voisines à la mienne	84%	89%	76%	85%	80%	92%
Communities in my province / ... dans des communautés de ma province	76%	87%	69%	79%	81%	89%
Other provinces or territories in Canada / ... dans d'autres provinces ou territoires du Canada	51%	76%	59%	62%	61%	50%
The United States / ... aux États-Unis	25%	45%	35%	31%	36%	20%
Internationally / ... dans d'autres pays	26%	42%	29%	30%	33%	20%

Green text indicates significantly higher than at least one other region @ 95% confidence
 Red text indicates significantly lower than at least one other region @ 95% confidence
 To what extent do you agree or disagree with each of the following statements?
 "I feel safe to travel to..."

Le vert indique un résultat considérablement plus élevé qu'au moins une autre région (confiance à 95 %)
 Le rouge indique un résultat considérablement moins élevé qu'au moins une autre région (confiance à 95 %)
 Dans quelle mesure êtes-vous d'accord avec chacun des énoncés suivants?
 « Je me sens à l'aise de voyager... »

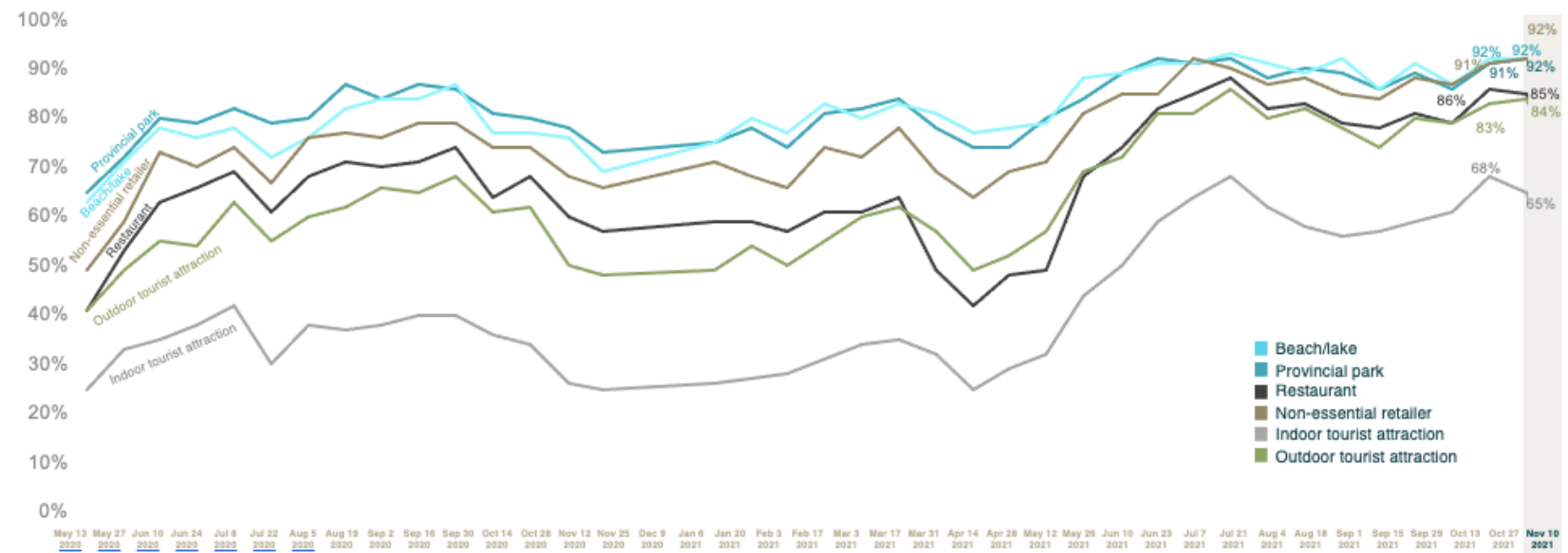


Source: [Destination Canada's Weekly COVID-19 Resident Sentiment, Nov 9, 2021](#)

Destination BC reports that 84% of BC residents are comfortable visiting outdoor tourist attractions

- In Destination BC's latest BC Residents' Public Perceptions Wave 39 (November 10, 2021) report, an estimated 84% of British Columbian residents said they were comfortable going to outdoor tourist attractions.
- Additionally, 92% of BC residents are comfortable participating in activities at beaches/lakes, provincial parks, and non-essential retailers.
- The same report showed that 85% of BC residents are comfortable going to restaurants and 65% are comfortable visiting indoor tourist attractions.

Tracking British Columbians' Comfort Levels With Activities (Total Definitely/Probably Would By Activity)



Base: All respondents, excluding not applicable/don't do this in general and not applicable/wouldn't do this at this time of year
D1. Would be comfortable doing/using each of the following in the next few weeks, or are you likely to hold off longer due to concerns about COVID-19?

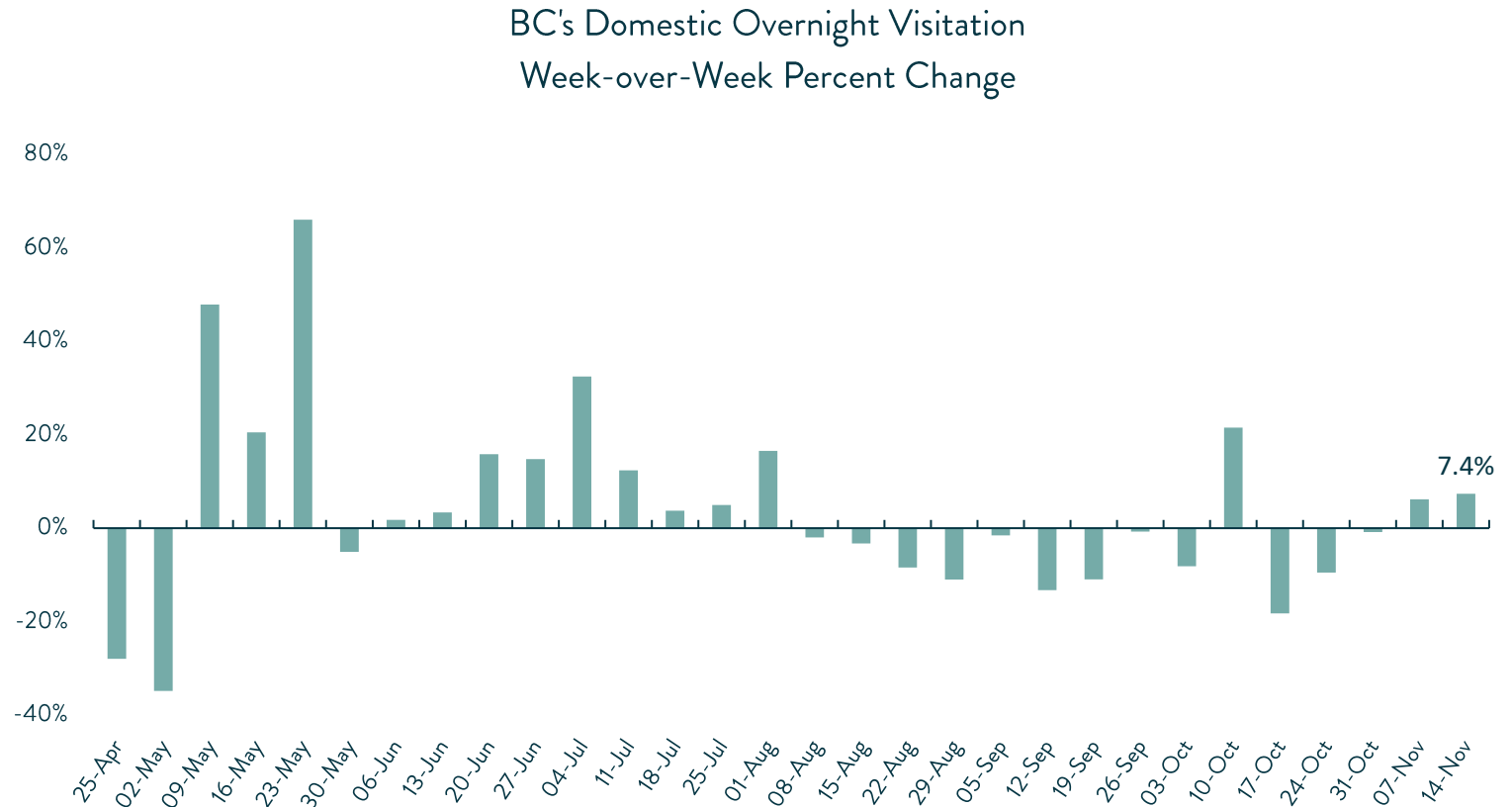
▲ Statistically significantly **higher** than previous wave.
▼ Statistically significantly **lower** than previous wave.

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Source: [Destination BC's Residents' Public Perceptions: COVID-19 Travel and Tourism Wave 39, Nov 10, 2021](#)

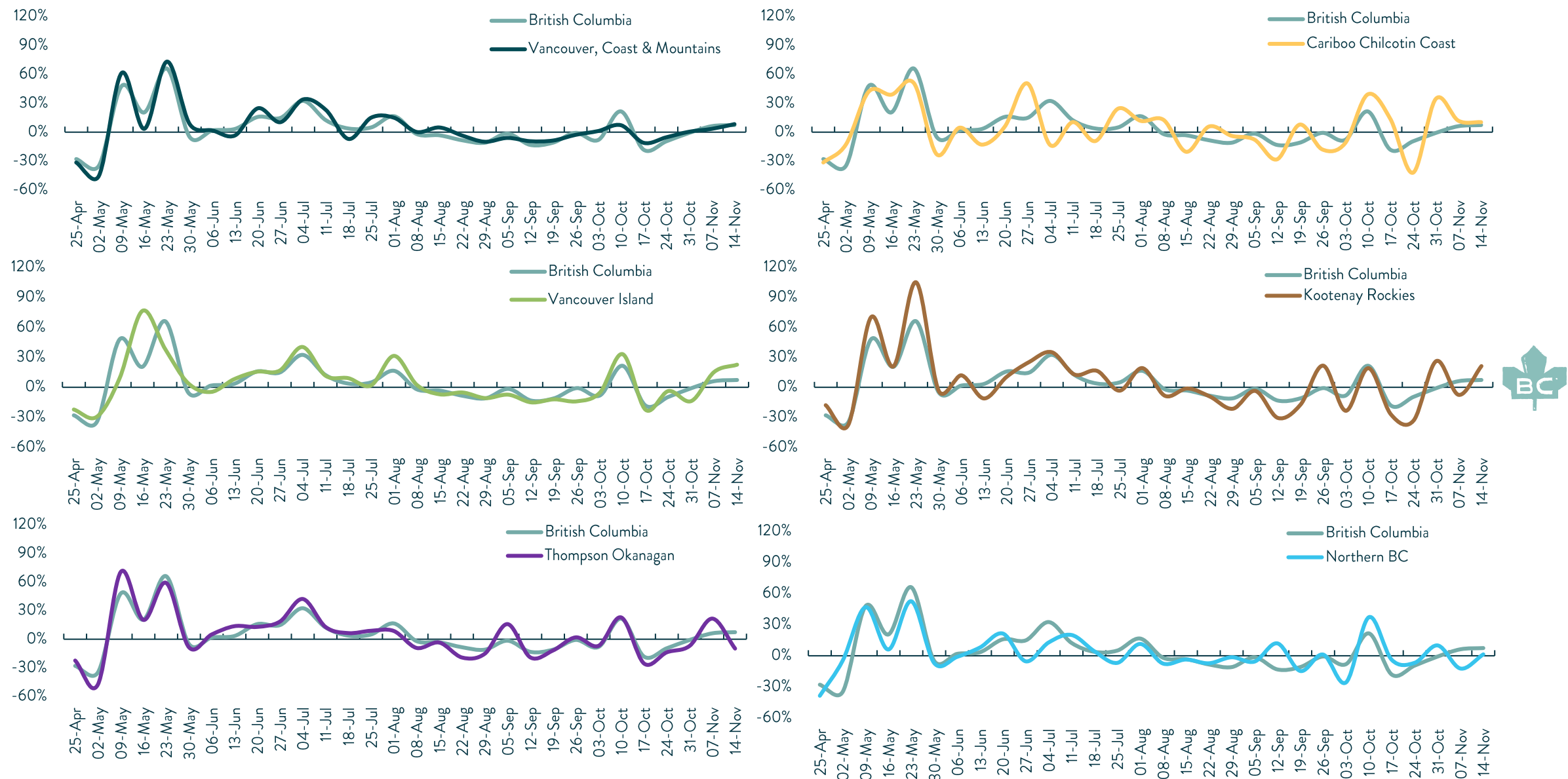
BC weekly domestic overnight visitation increased +7.4% from the previous week

- According to Environics Analytics Weekly COVID Tracker Report, during the week ending November 14, 2021, BC experienced a week-over-week increase of +7.4% in weekly domestic overnight visitation.
- Week-over-week increases in domestic overnight visitation were seen in five of six tourism regions across the province:
 - Vancouver Island (+22.6%)
 - Kootenay Rockies (+21.2%)
 - Cariboo Chilcotin Coast (+10.4%)
 - Vancouver, Coast & Mountains (+8.3%)
 - Northern BC (+1.3%)
- Week-over-week decreases in domestic overnight visitation were seen in one tourism region:
 - Thompson Okanagan (-9.8%)



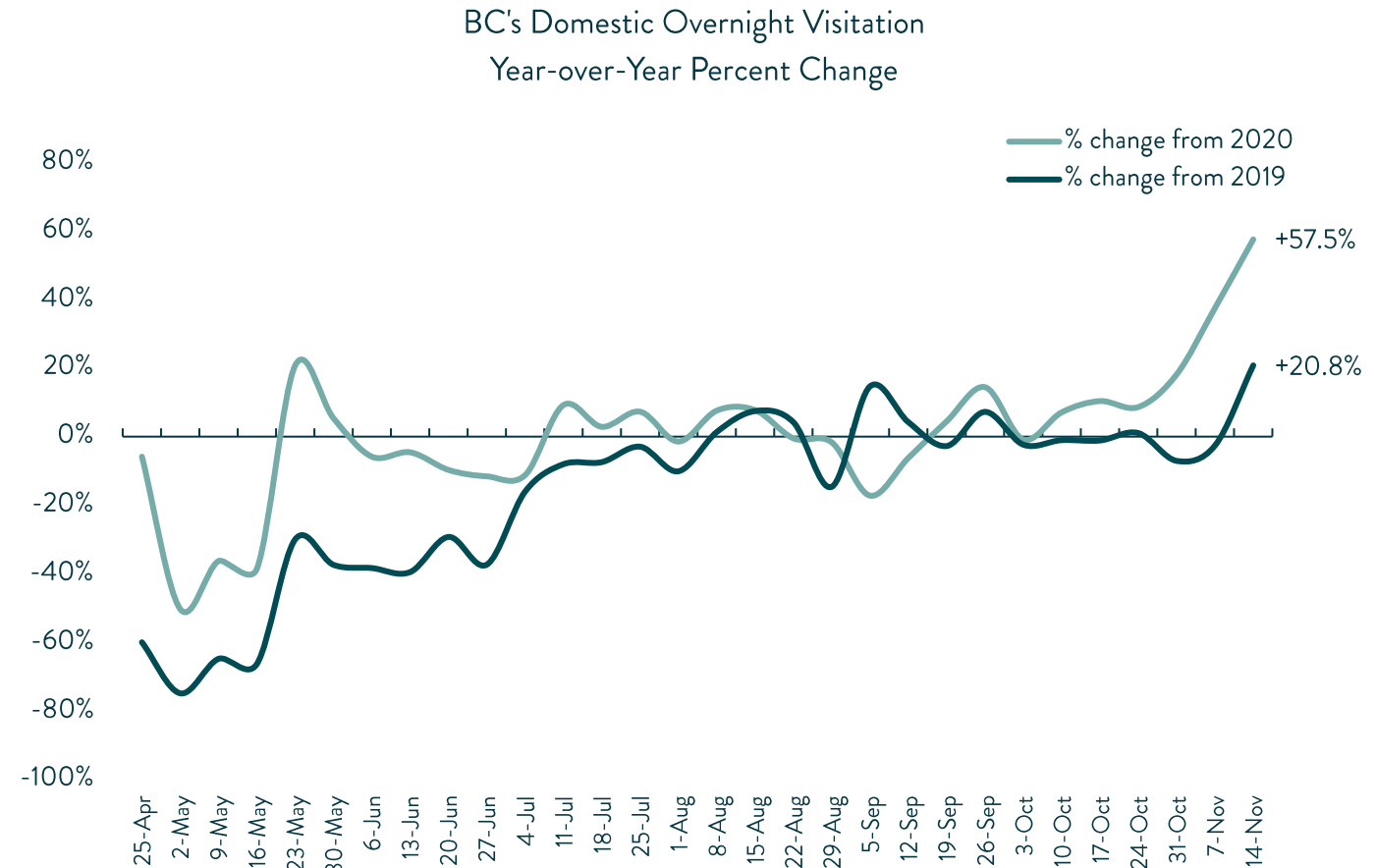
Source: [Environics Analytics Weekly COVID Tracker Report, Nov 14, 2021](#)

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



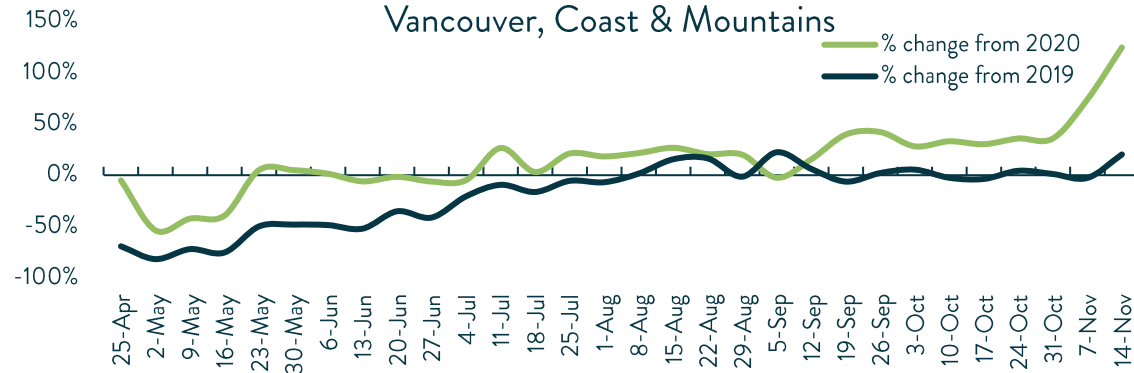
BC sees an increase of +20.8% in weekly domestic overnight visitation compared to the same period in 2019

- For the week ending November 14, 2021, Environics Analytics reported that weekly domestic overnight visitation increased +57.5% compared to the same week in 2020. Compared to the same week in 2019, weekly domestic overnight visitation increased +20.8%.
- Every tourism region saw a year-over-year increase in weekly visitation when compared to the same period in both 2020 and 2019. This can likely be partly attributed to when the Remembrance Day Statutory Holiday fell within the week.
 - Vancouver, Coast & Mountains (+124.5% over 2020; +20.2% over 2019)
 - Vancouver Island (+58.3%; +35.5%)
 - Thompson Okanagan (+43.7%; +15.6%)
 - Cariboo Chilcotin Coast (+43.6%; +26.4%)
 - Kootenay Rockies (+41.4%; +62.4%)
 - Northern BC (+4.5%; +10.1%)

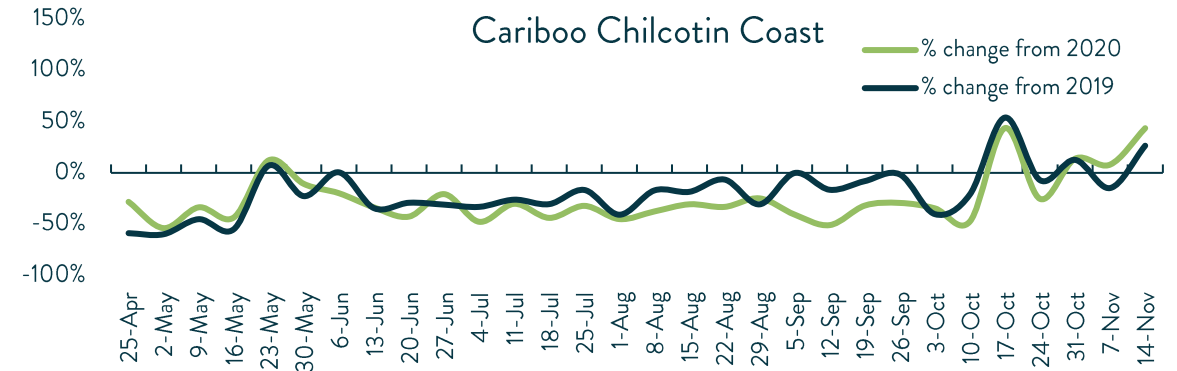


Regional Domestic Overnight Visitation Year-over-Year Percent Change

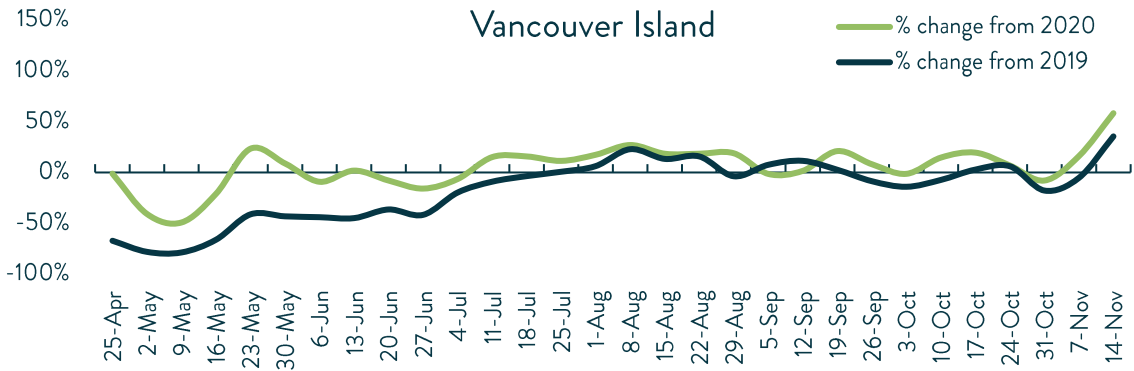
Vancouver, Coast & Mountains



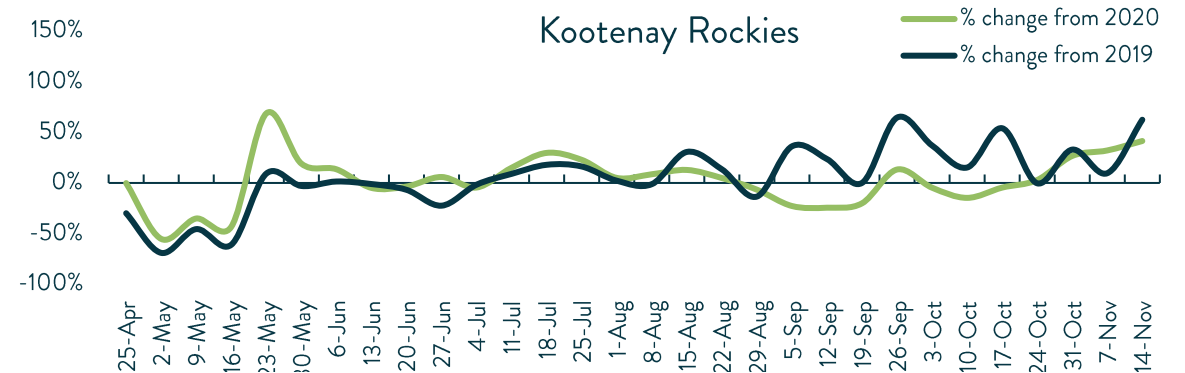
Cariboo Chilcotin Coast



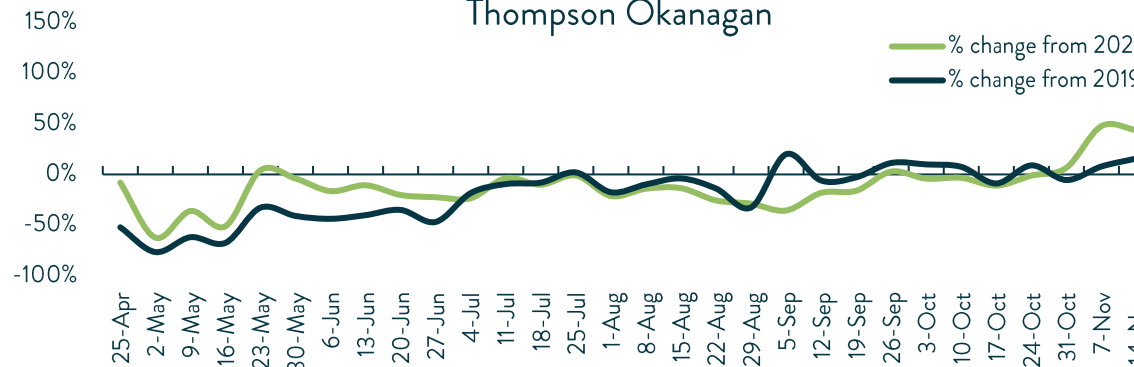
Vancouver Island



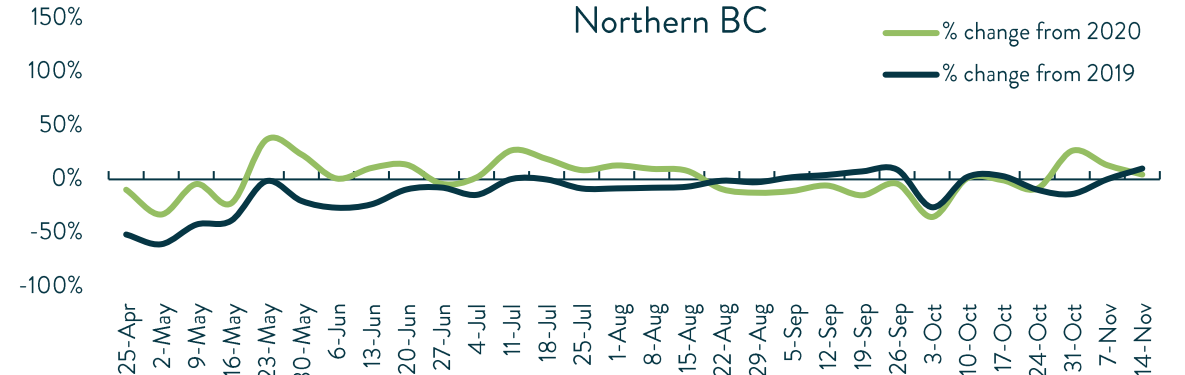
Kootenay Rockies



Thompson Okanagan

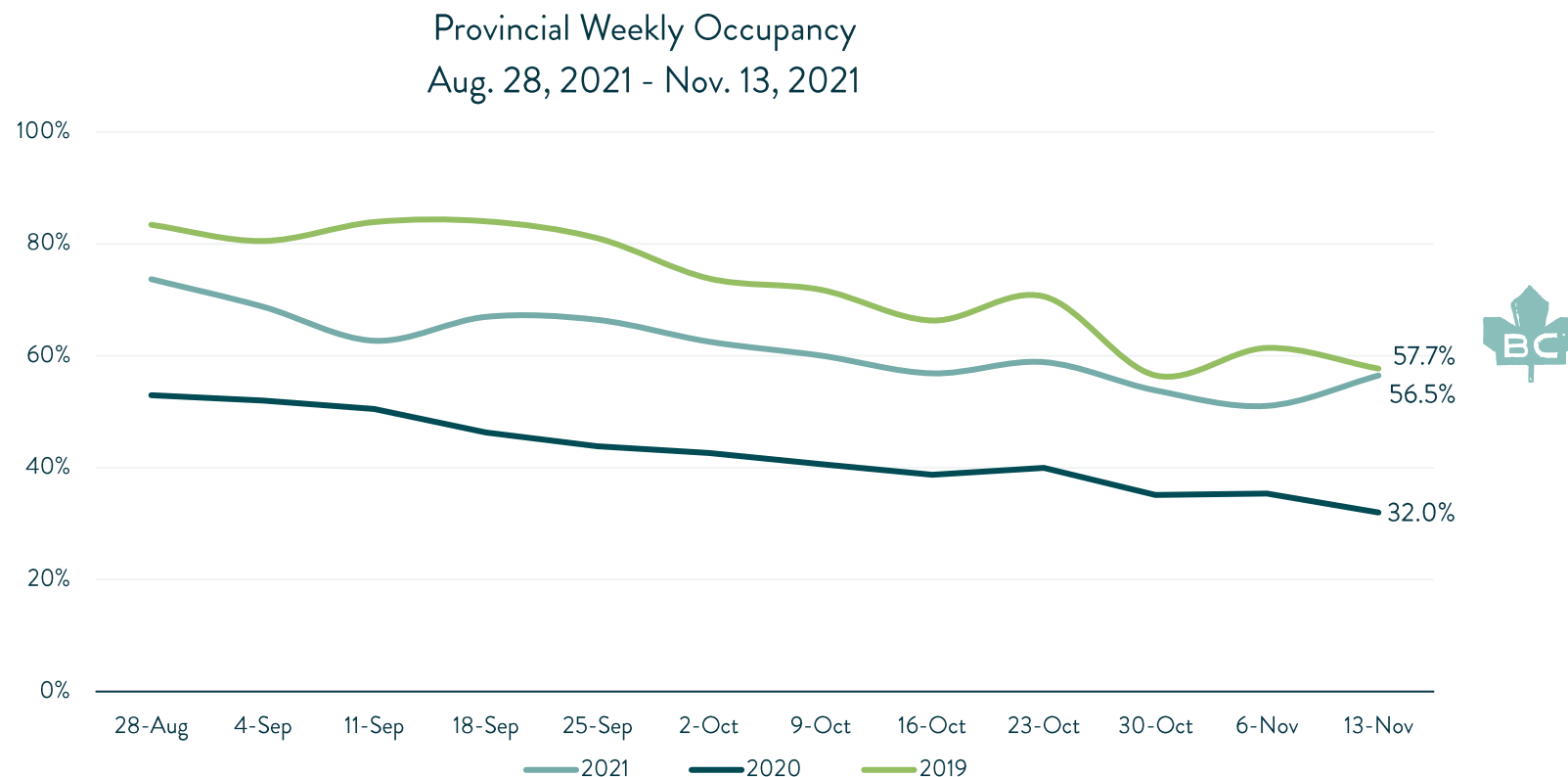


Northern BC



BC's occupancy rate (56.5%) increased +24.5 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 56.5% for the week of November 7 - 13, 2021. This represents an increase of +5.4 points from the previous week.
- It also represents an increase of +24.5 points compared to a similar period in 2020 and a decrease of -1.2 points compared to a similar period in 2019.



Source: [2021 STR, STR Global Ltd, Nov 7 - 13, 2021](#)

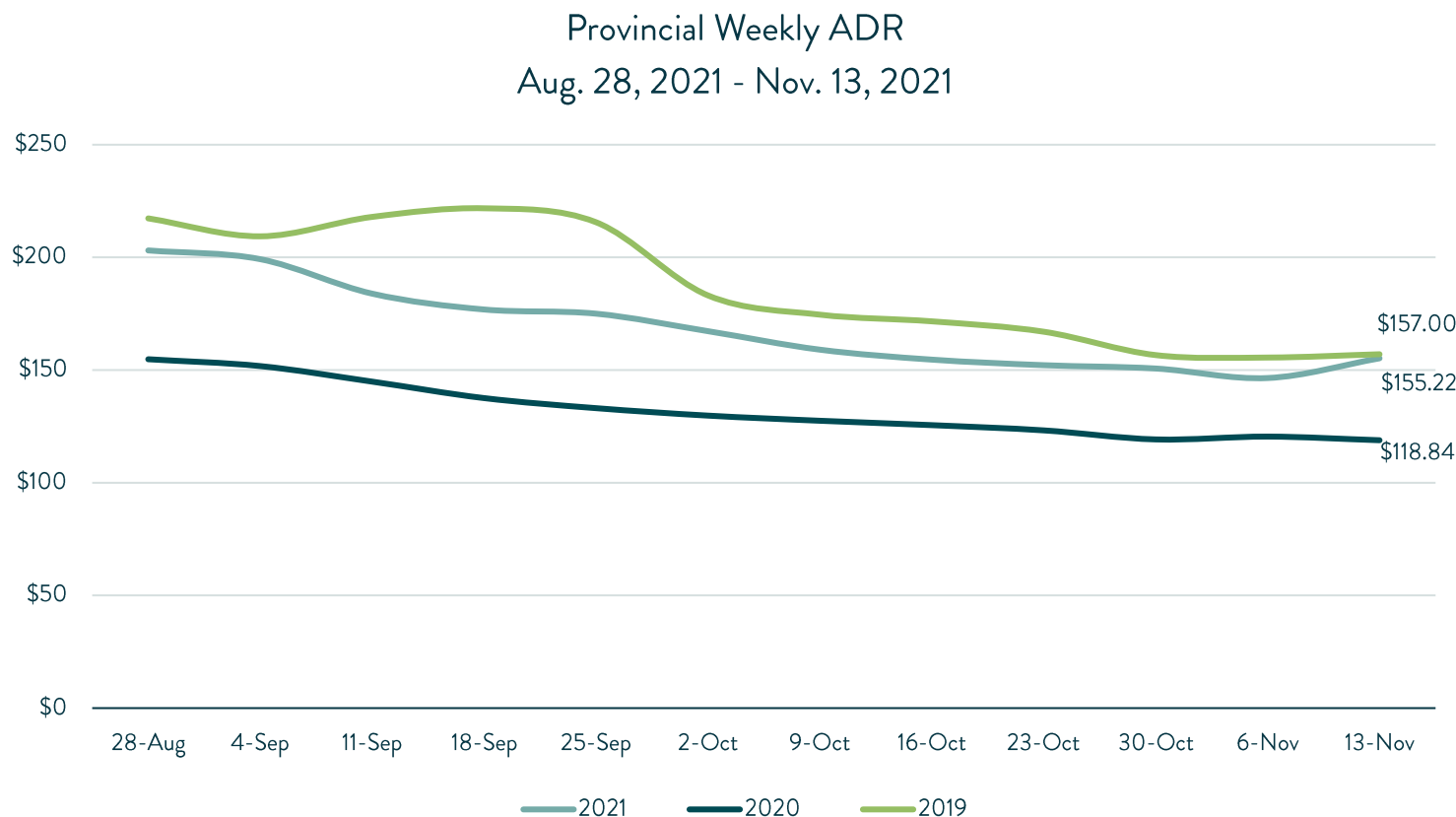
British Columbia's Weekly Hotel Occupancy Rate

	Nov. 7 – 13, 2021	Week-over-Week Nov. 7 – 13, 2021 vs. Oct. 31 – Nov. 6, 2021	Year-over-Year Nov. 7 – 13, 2021 vs. Nov. 8 – 14, 2020	2021 vs 2019 Nov. 7 – 13, 2021 vs. Nov. 10 – 16, 2019
	Occupancy Rate	Occupancy Point Change	Occupancy Point Change	Occupancy Point Change
British Columbia	56.5%	+5.4	+24.5	-1.2
Vancouver (City of)	59.7%	+9.3	+40.1	-15.0
Whistler	46.8%	+16.0	+18.3	+15.9
Victoria	64.2%	+11.5	+33.6	+9.1
Kelowna	47.1%	+6.2	+20.7	-6.6
Kamloops	63.1%	+2.0	+20.8	+23.3
Richmond	57.5%	+6.0	+24.1	-16.9
Revelstoke	30.6%	-2.5	+2.5	-2.7



BC's average daily rate (\$155.22) increased +30.6% compared to the same period in 2020

- STR, an agency which reports BC's hotel performance, shows BC's average daily rate (ADR) was \$155.22 for the week of November 7 - 13, 2021.
- This represents an increase of +30.6% compared to a similar period in 2020 and a decrease of -1.1% compared to 2019.



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

	Nov. 7 – 13, 2021	Week-over-Week Nov. 7 – 13, 2021 vs. Oct. 31 – Nov. 6, 2021	Year-over-Year Nov. 7 – 13, 2021 vs. Nov. 8 – 14, 2020	2021 vs 2019 Nov. 7 – 13, 2021 vs. Nov. 10 – 16, 2019
	ADR	ADR Percent Change	ADR Percent Change	ADR Percent Change
British Columbia	\$155.21	-6.1%	+30.6%	-1.1%
Vancouver (City of)	\$190.82	+3.0%	+34.3%	-5.8%
Whistler	\$245.12	+13.5%	+31.5%	+15.3%
Victoria	\$187.34	+12.0%	+33.4%	+33.2%
Kelowna	\$125.20	+2.3%	+18.7%	-2.6%
Kamloops	\$110.56	+2.3%	+20.0%	+7.0%
Richmond	\$149.68	+4.1%	+29.6%	-4.7%
Revelstoke	\$102.20	-2.7%	+2.9%	+1.5%



BC's RevPAR (\$87.66) increased +17.5% from the previous week

- STR, an agency which reports BC's hotel performance, shows BC's revenue per available room (RevPAR) was \$87.66 for the week of November 7 - 13, 2021. This represents an increase of +17.5% from the previous week.
- BC's RevPAR showed an increase (+130.6%) for the week of November 7 - 13, 2021 compared to a similar period in 2020 and a decrease (-3.2%) compared to 2019.
- RevPAR increased compared to a similar period in 2020 for all reported cities. RevPAR surpassed 2019 levels in three reported cities; Whistler, Victoria, and Kamloops.

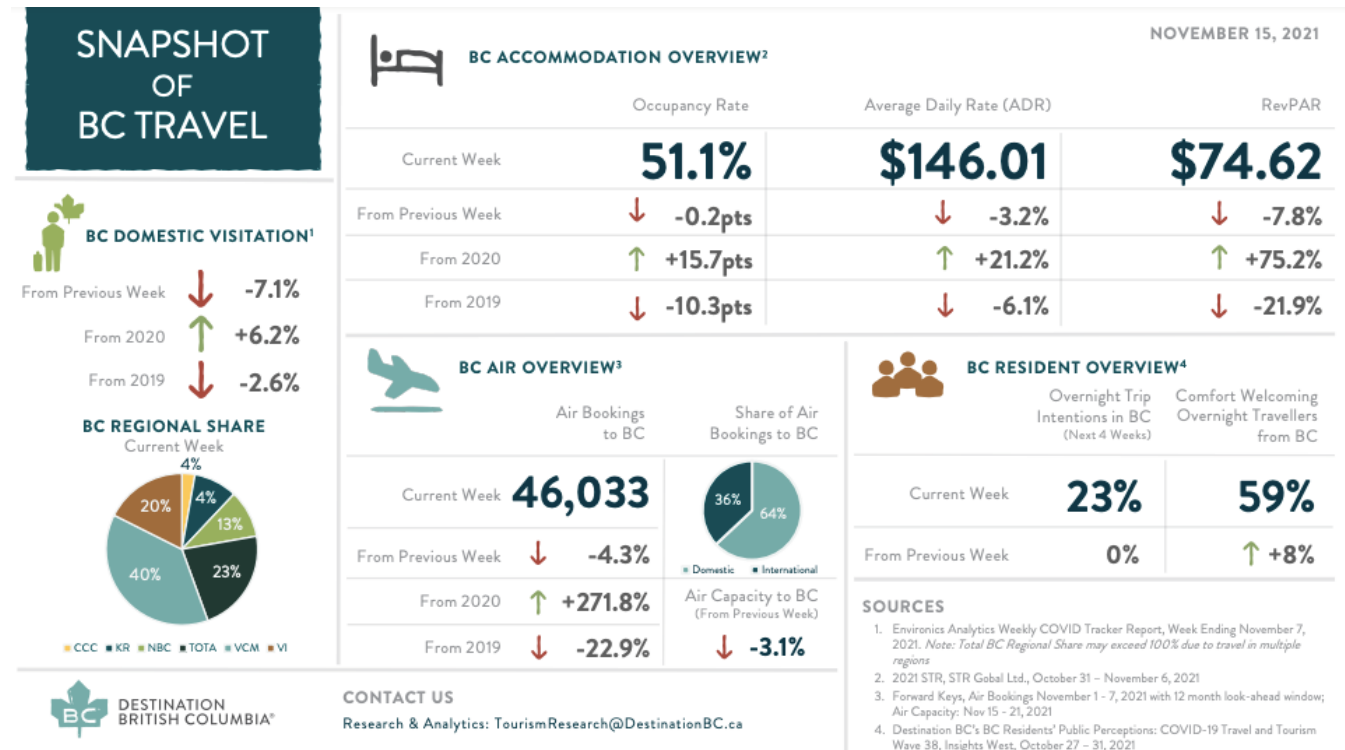
		Week-over-Week	Year-over-Year	2021 vs 2019
	Nov. 7 – 13, 2021	Nov. 7 – 13, 2021 vs. Oct. 31 – Nov. 6, 2021	Nov. 7 – 13, 2021 vs. Nov. 8 – 14, 2020	Nov. 7 – 13, 2021 vs. Nov. 10 – 16, 2019
	RevPAR	RevPAR Percent Change	RevPAR Percent Change	RevPAR Percent Change
British Columbia	\$87.66	+17.5%	+130.6%	-3.2%
Vancouver (City of)	\$113.88	+22.1%	+309.1%	-24.7%
Whistler	\$114.75	+72.4%	+116.2%	+74.8%
Victoria	\$120.30	+36.3%	+180.3%	+55.2%
Kelowna	\$58.99	+17.9%	+111.4%	-14.6%
Kamloops	\$69.71	+5.7%	+79.1%	+69.7%
Richmond	\$86.00	+16.3%	+123.1%	-26.4%
Revelstoke	\$31.23	-10.2%	+12.1%	-6.7%

Source: [2021 STR, STR Global Ltd, Nov 7 - 13, 2021](#)

Destination BC's Snapshot of BC Travel reports that international bookings made up 36% of total BC Air Bookings for the week of Nov. 9 - 15

Some highlights from Destination BC's weekly [Snapshot of BC Travel](#) for the week of November 9 - 15:

- International bookings made up 36% of total BC Air Bookings. (Forward Keys)
- BC Air Bookings are up +271.8% compared to the same period in 2020, but down -22.9% compared to the same period in 2019. (Forward Keys)
- Vancouver, Coast & Mountains and Thompson Okanagan regions make up 63% of BC's domestic visitation. (EnviroNics Analytics)



Source: [Destination BC's Snapshot of BC Travel Oct 25, 2021](#)

Conference Board of Canada reports that 86% of Canadians miss travel

- According to the Conference Board of Canada, 23% of Canadians are willing to travel outside the country for leisure, compared to 16% at the start of 2021.
- The same survey showed that 86% of Canadians said they miss travel, and when they do plan trips will consider four primary factors – personal connection, proximity, pandemic management, and price.
- Additionally, the survey reported that the biggest barrier to travel now is more likely to be related to testing requirements and other protocols, rather than health concerns.



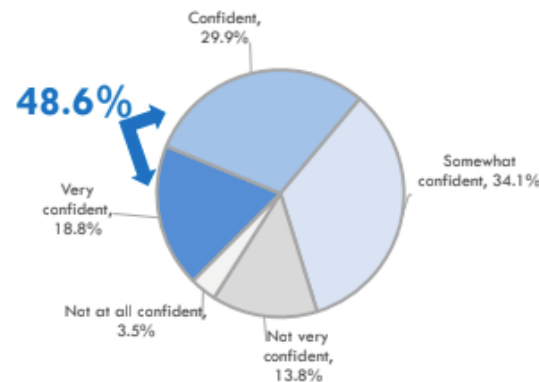
Source: [Conference Board of Canada Quarterly Survey, Nov 24, 2021](#)

Destination Analysts reports that 48.6% of US travellers are confident in their ability to travel safely

- According to Destination Analysts' latest Travel Sentiment Index (November 16, 2021), 48.6% of American travellers said they are confident that they could travel safely in the current environment.
- In comparison, 34.1% of US travellers said that they are somewhat confident in their ability to travel safely in the current environment, and 17.3% said they are not confident about being able to travel safely.

CONFIDENCE IN ABILITY TO TRAVEL SAFELY

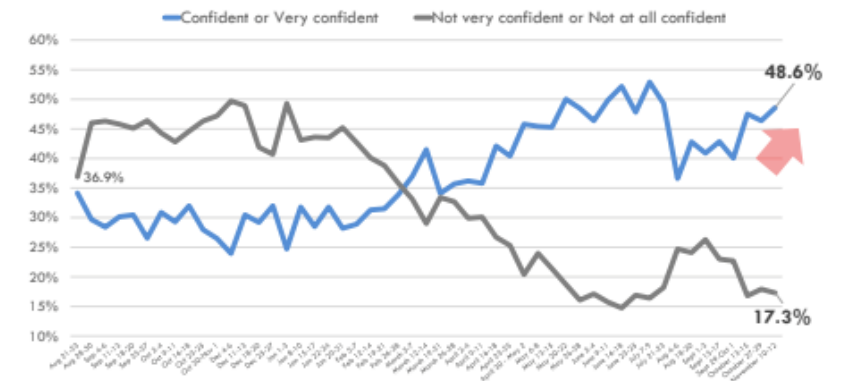
Question: How confident are you that you can travel safely in the current environment?



(Base: Wave 24-34 and 39-78 data. All respondents, 1,200+ completed surveys each wave.)

Destination Analysts
BY YOUR RESEARCH

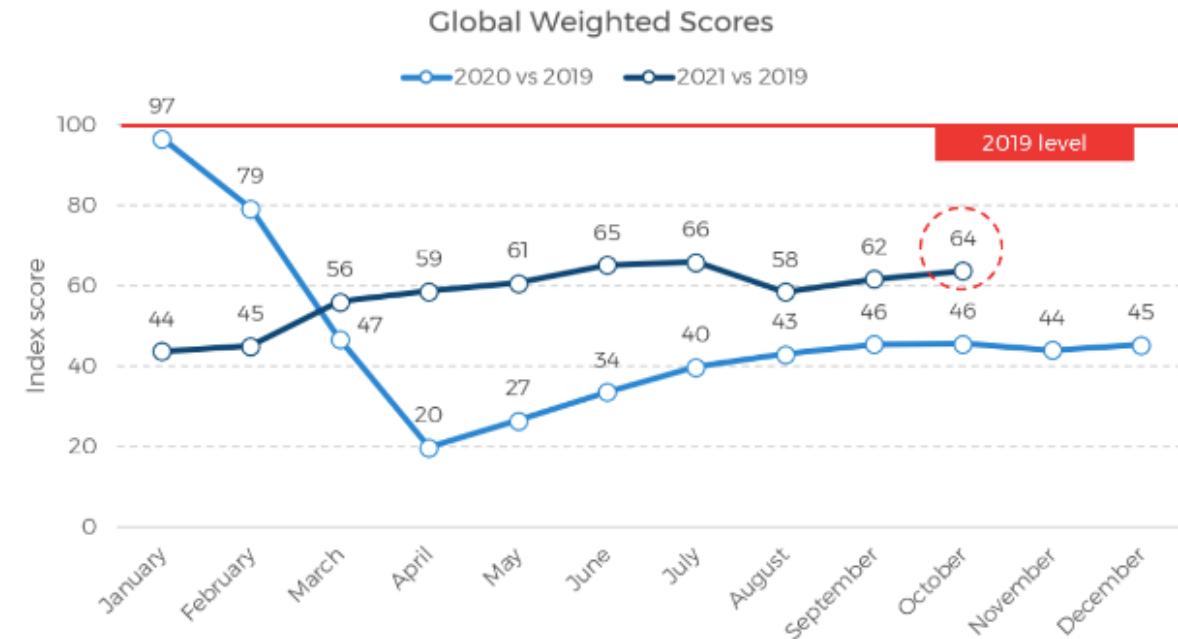
Historical data



Source: [Destination Analysts Travel Sentiment Index Nov 16, 2021](#)

Skift reports the Global Recovery Index has increased to 64 points out of 100 in September 2021

- According to Skift, the Global Recovery Index (an overall index of travel performance based on factors such as car rentals, flights, and lodging) increased by +2 points from September 2021 to 64 points in October 2021. This is in comparison to a baseline reading out of 100 for the same period in 2019.
- The countries which saw the largest increase in their Recovery Index score were generally in the Asia Pacific region. For example, Australia's Recovery Index rose +5 points between September 2021 and October 2021.



Source: Skift Research

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



Expedia reports that business travel increased +110% compared to the same time period in 2020

- Expedia's Q3 report says that due to the increase of businesses returning to normal and employees returning to in-person activities, business travel is on the rise. Between July and September 2021, it was estimated that global business travel was up 110% compared to a similar time period in 2020.
- Paris, Chicago, London, and New York were the top booked destinations for business travellers.

Top 10 Booked Destinations | Q3 2021



APAC

Shanghai
Beijing
Belmont
Shenzhen
New Delhi
Mumbai
Bengaluru
Chennai
Hyderabad
Darwin



EMEA

Paris
London
Stockholm
Berlin
Oslo
Copenhagen
Lyon
Munich
Frankfurt
Hamburg



NORAM

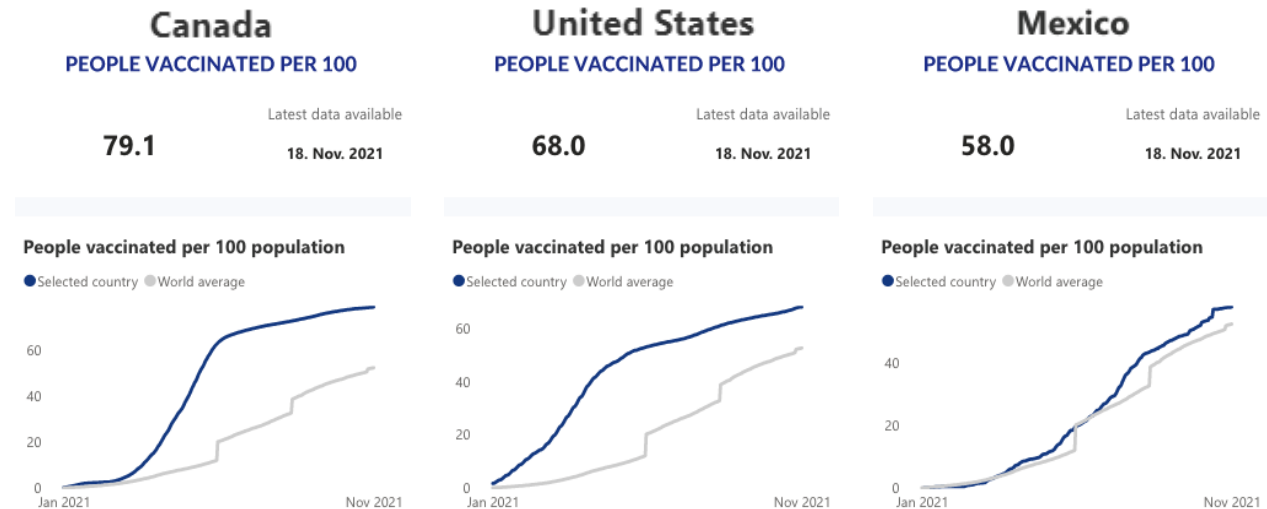
Chicago
Atlanta
New York
Houston
Denver
Dallas
Las Vegas
Boston
Los Angeles
Charlotte



Source: [Expedia Travel Recovery Trend Report Q3](#)

UNWTO reports 52.6% of the global population has received at least one dose of a vaccine

- According to the UNWTO, as of November 18, 2021, the global average for vaccination rates (with at least one dose) is at 52.6 out of every 100 people.
- The same dashboard shows that as of November 18, 2021, Canada has vaccinated (with at least one dose) 79.1 out of every 100 people, compared to the US which has vaccinated 68.0 out of every 100 people, and Mexico which has vaccinated 58.0 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, Nov 18, 2021](#)

A summary of relevant tourism headlines from around the world

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

- [Ottawa confirms it will nix COVID-19 test for Canadians taking short trips, starting Nov. 30](#) (CBC)
- [Canada expands its list of vaccines accepted for travel](#) (New York Times)
- ['Costly, confusing and cumbersome' COVID-19 testing requirement is a barrier to recovery for Canada's tourism industry](#) (Yahoo News)
- [Dropping PCR test for short trips for Canadians does not go far enough to help rebuild the devastated Canadian travel and tourism industry](#) (Newswire)
- [Fear of travelling: Canadians need to put travel risk into perspective](#) (The Conversation)
- [Health minister promises announcement soon on COVID-19 border measure changes](#) (CTV)



Tourism and COVID-19 dashboard and reporting resources

- Destination BC is publishing a 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

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