

COVID-19 Research Roundup

May 2, 2022



Yellowhead, Northern British Columbia

BC's Response to COVID-19

Province-wide restrictions

The insights noted in this Research Roundup were gathered after the reduction of some public health restrictions in February 2022. Health and safety protocols, such as proof of vaccination and mask wearing, vary by event and business type.

[Click here](#) for more information on BC's current COVID-19 guidance and regulations.

On July 19, 2021, Canada announced the opening of the border to fully vaccinated US citizens starting August 9. On September 7, 2021 Canada began allowing any fully vaccinated travellers entry into the country if they provide mandatory travel information including pre-entry test results. Starting April 1, 2022, fully vaccinated travellers no longer have to show a negative COVID-19 test to enter Canada.

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 month related to the travel and tourism industry and COVID-19.

Last month in brief:

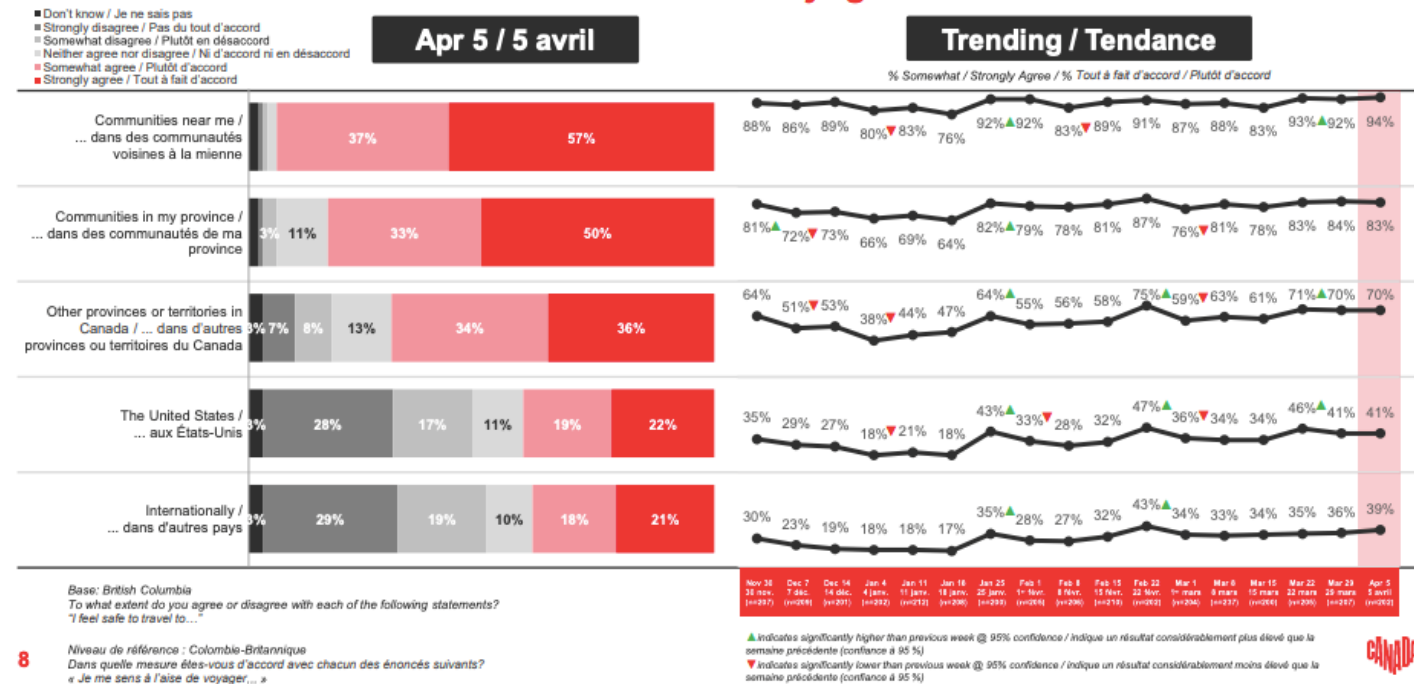
- Destination Canada reports that 70% of BC residents feel safe travelling to other provinces or territories in Canada
- Destination BC reports that 48% of BC residents intend to travel elsewhere in BC for an overnight trip within the next 2-3 months
- BC weekly domestic overnight visitation decreased -17.1% from the previous week
- BC sees an increase of +21% in weekly domestic overnight visitation compared to the same period in 2019
- BC's occupancy rate (64%) increased +30 points compared to the same period in 2021
- Destination BC's latest Snapshot of BC Travel shows Vancouver, Coast & Mountains region made up 38% of domestic overnight visitation
- Skift reports that Canada's Global Recovery Index score is at 87.9 out of 100
- Skift reports that Google is increasingly the first website for travel related questions
- Longwoods reports that transportation costs are impacting Americans' travelling decisions more than COVID-19
- Destination Analysts reports 81.5% of American travellers feel safe travelling outside the United States
- UNWTO shows that 65.4% 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 70% of BC residents feel safe travelling to other provinces or territories in Canada

- In Destination Canada's latest Resident Sentiment report (April 5, 2022), 70% of BC residents stated they feel safe travelling to other provinces or territories in Canada. As well, 94% of BC residents feel safe travelling to communities near them (day trip), 83% feel safe travelling to other communities in their province (overnight trip), and 41% feel safe travelling to the United States. These indicators have all remained flat since the previous wave (March 29).
- The same report shows that 39% of BC residents feel safe travelling internationally which represents an increase of +3 points from the previous wave.

British Columbia / Colombie-Britannique

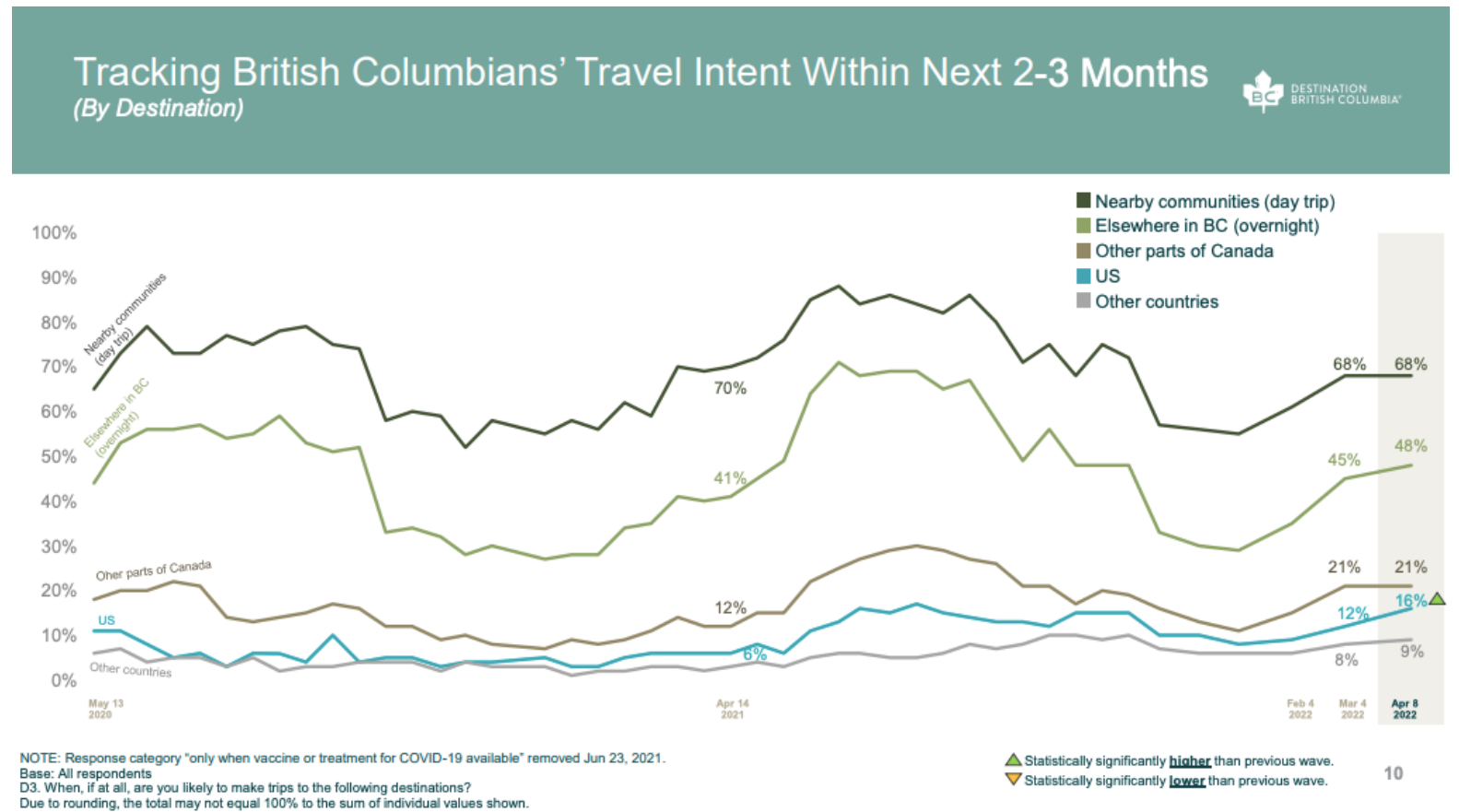
I feel safe to travel / Je me sens à l'aise de voyager



Source: [Destination Canada's Weekly COVID-19 Resident Sentiment, Apr 5, 2022](#)

Destination BC reports that 48% of BC residents intend to travel elsewhere in BC for an overnight trip within the next 2-3 months

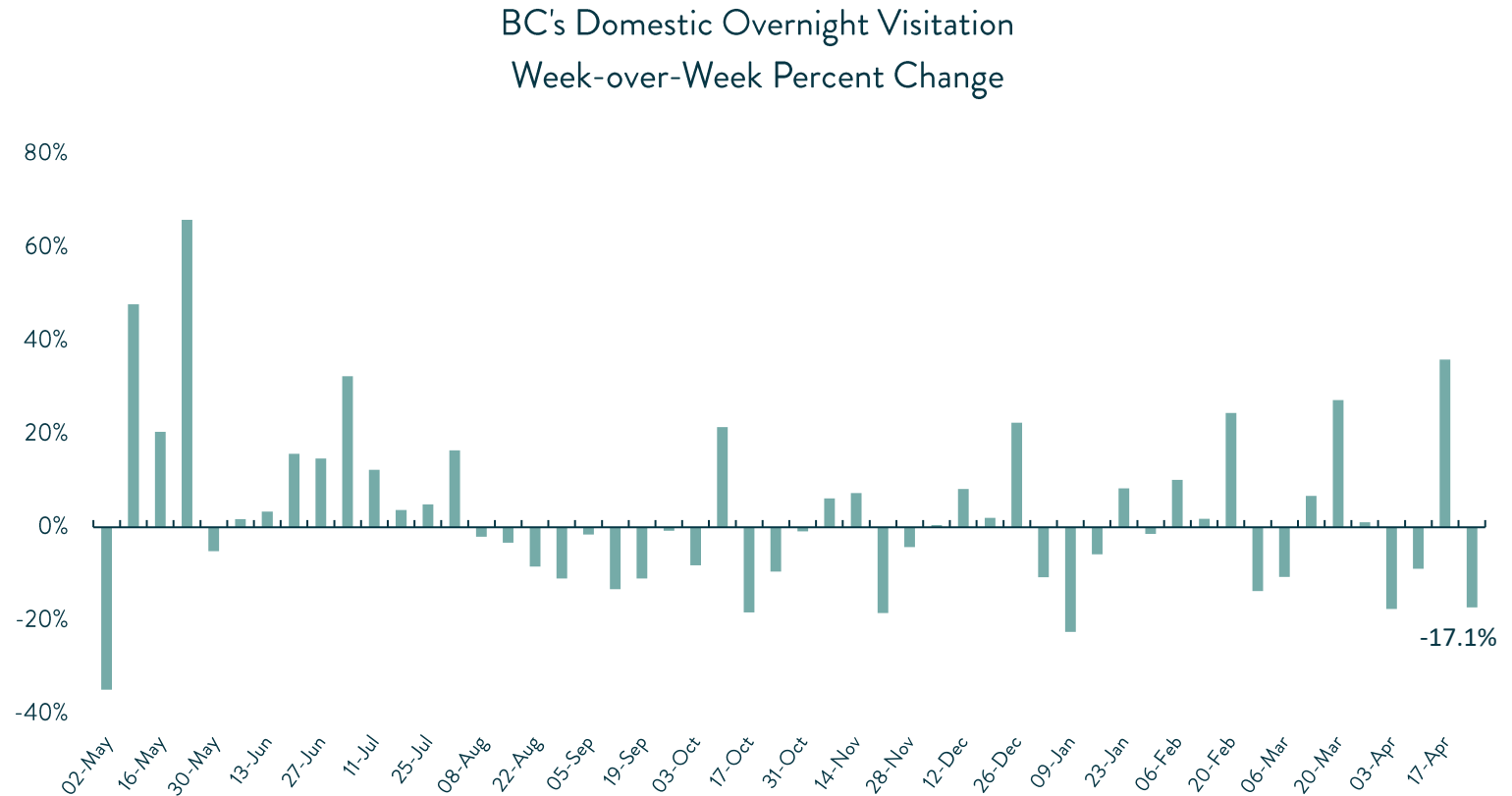
- In Destination BC's latest BC Residents' Public Perceptions Wave 43 (April 8, 2022) report, an estimated 48% of British Columbians said they intend to travel elsewhere in BC for an overnight trip within the next 2-3 months, up +3 points from March 4, 2022.
- Additionally, 68% of BC residents intend to travel to nearby communities for a day trip in the next 2-3 months, and 21% to other provinces in Canada. These results are both flat from the previous wave.
- The same report showed that BC residents' intent to travel to the US within the next 2-3 months increased +4 points to 16% while intent to travel to other countries increased by +1 point to 9%.



Source: [Destination BC's Residents' Public Perceptions: COVID-19 Travel and Tourism Wave 44, Apr 8, 2022](#)

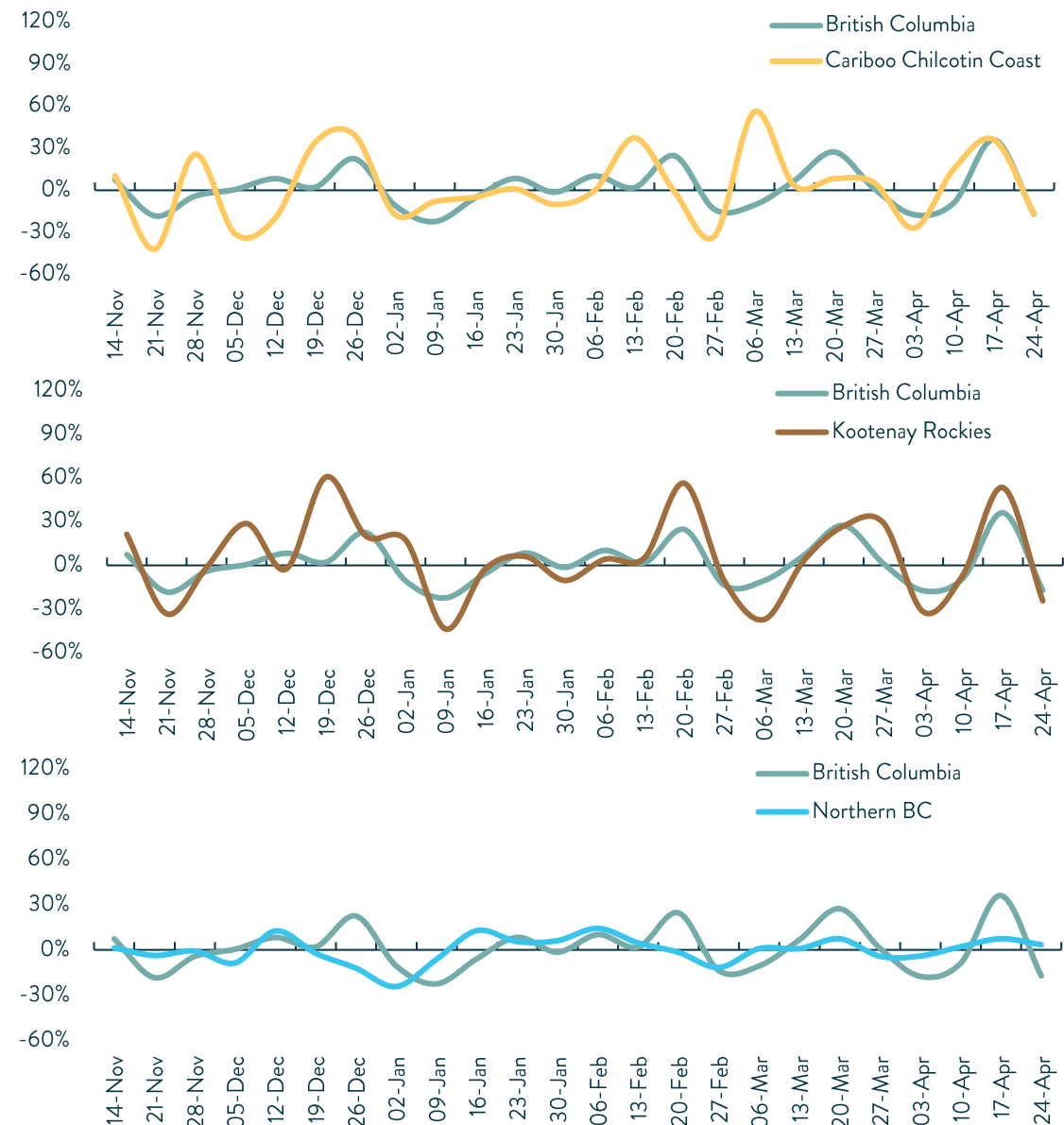
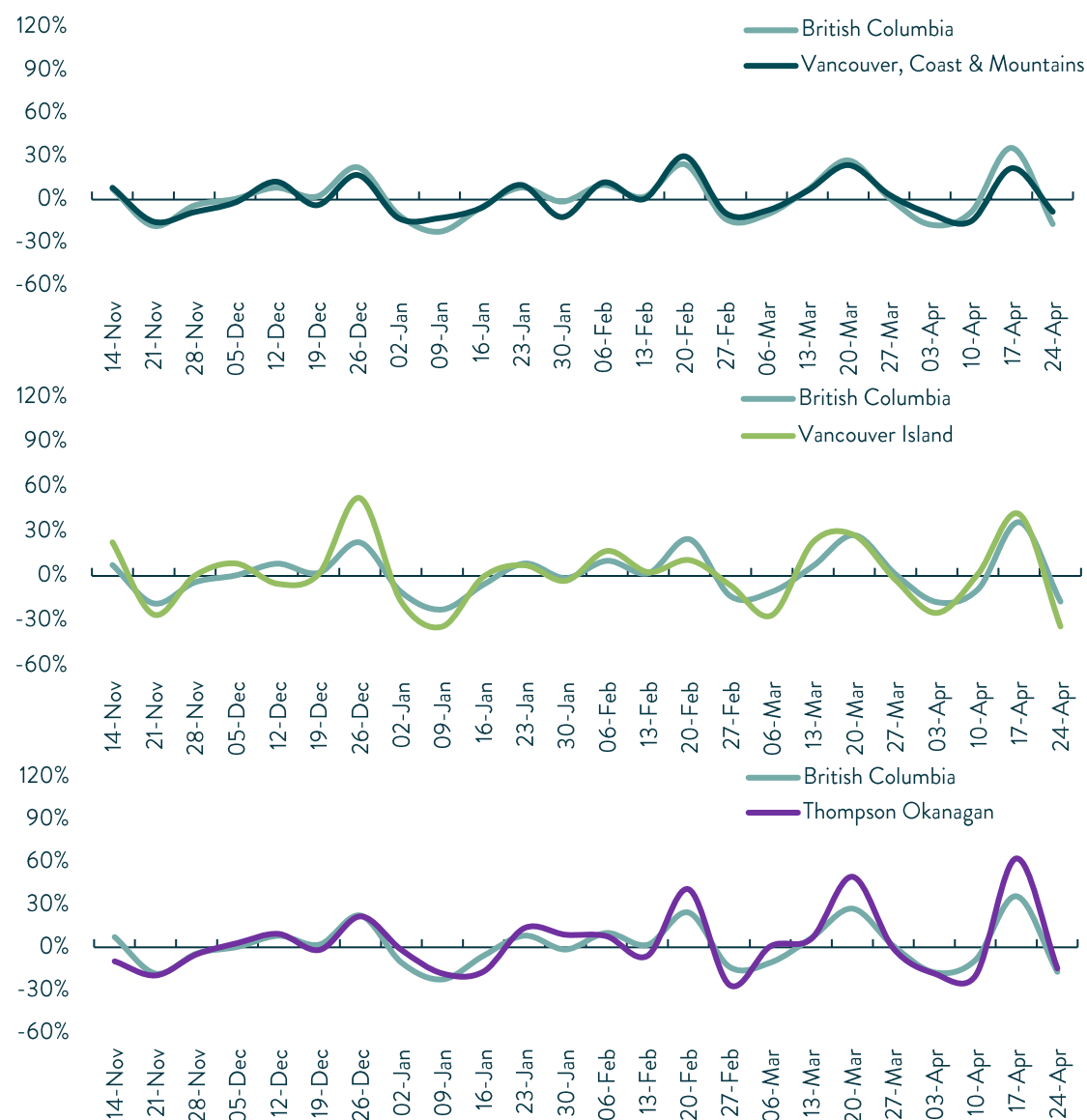
BC weekly domestic overnight visitation decreased -17.1% from the previous week

- According to Environics Analytics Weekly Tracker Report, during the week ending April 24, 2022, BC experienced a week-over-week decrease of -17.1% in weekly domestic overnight visitation. This is due to the Easter long-weekend during the prior week.
- Week-over-week increases in domestic overnight visitation were seen in one of six tourism regions across the province:
 - Northern BC (+3.4%)
- Week-over-week decreases in domestic overnight visitation were seen in the other five tourism regions:
 - Vancouver, Coast & Mountains (-8.4%)
 - Thompson Okanagan (-14.8%)
 - Cariboo Chilcotin Coast (-16.6%)
 - Kootenay Rockies (-24.5%)
 - Vancouver Island (-33.8%)



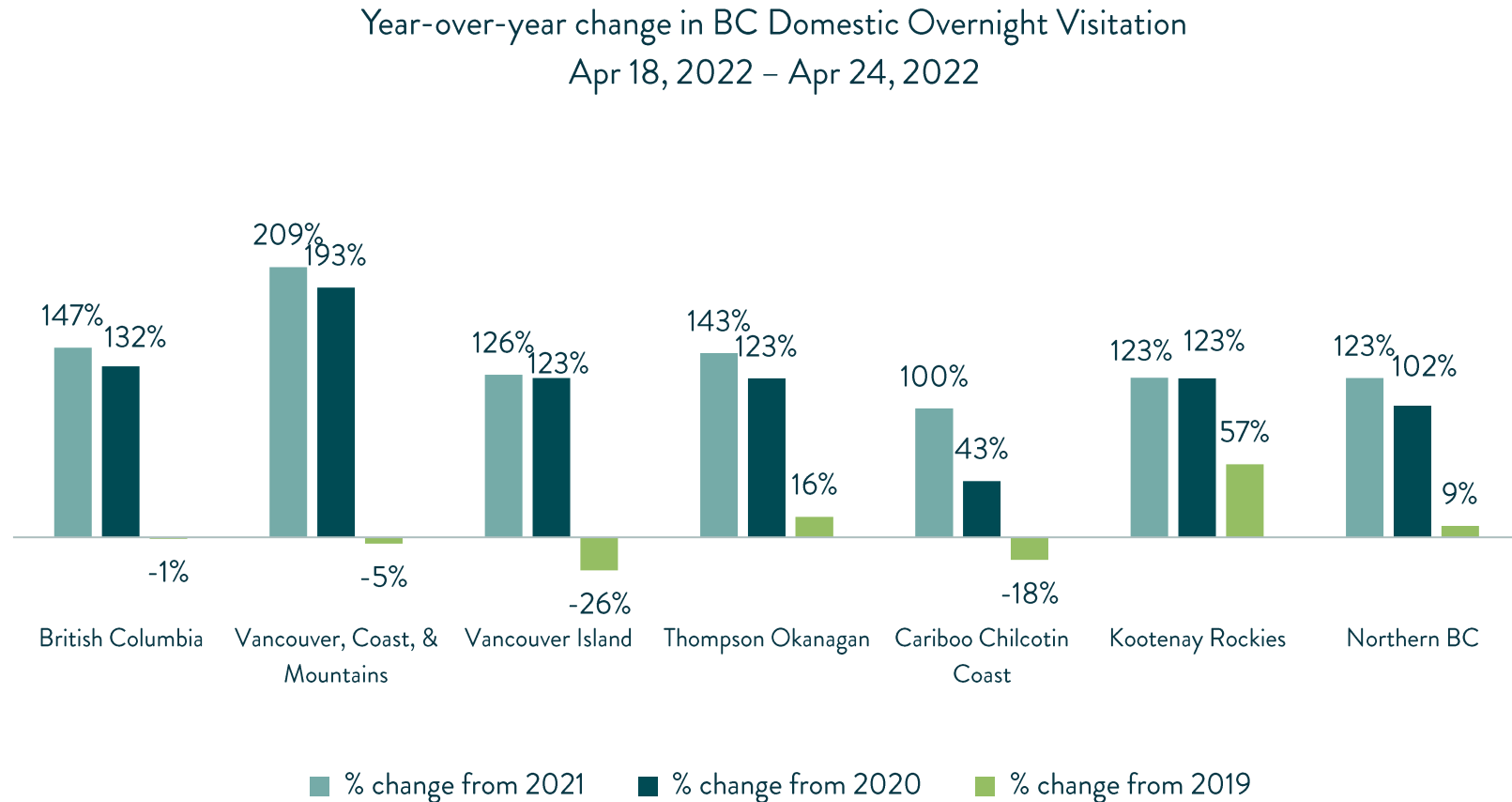
Source: [Environics Analytics Weekly Tracker Report, Apr 24, 2022](#)

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



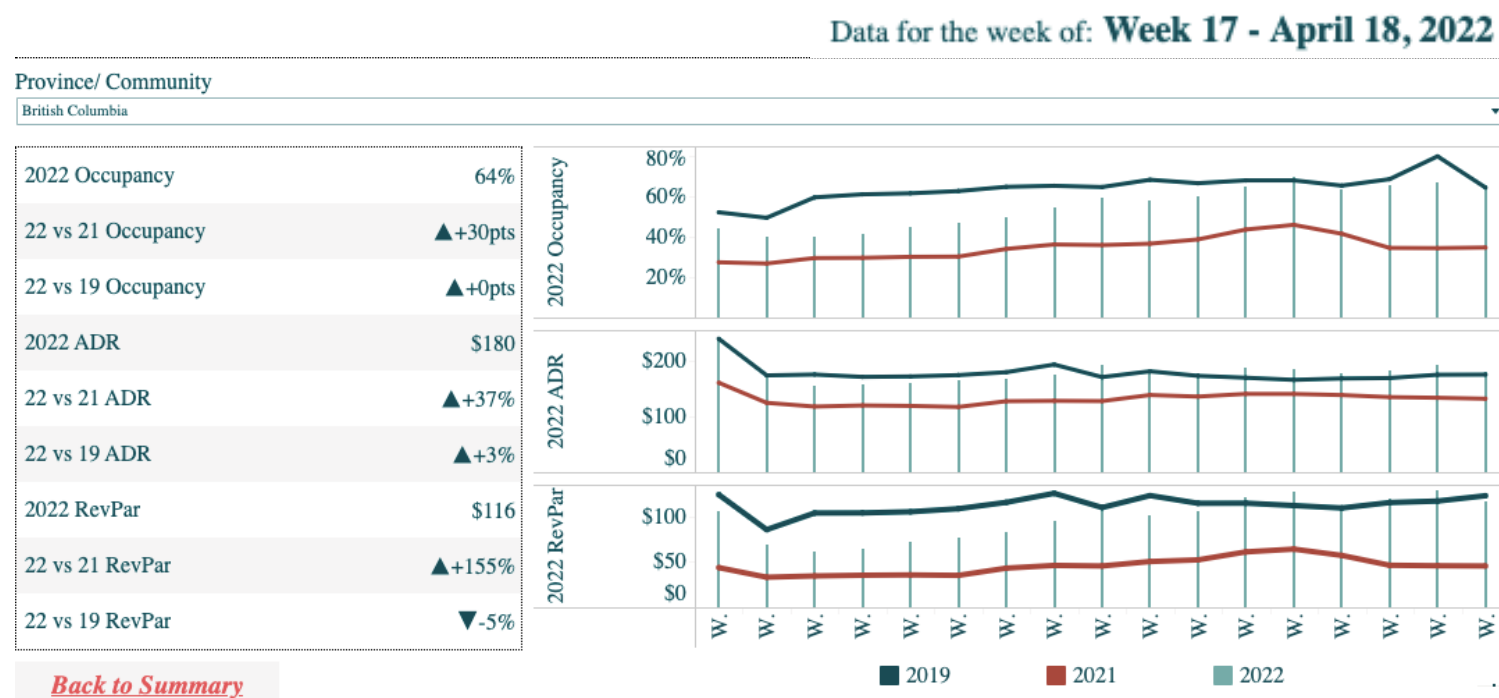
BC sees an increase of +21% in weekly domestic overnight visitation compared to the same period in 2019

- For the week ending April 24, 2022, Environics Analytics reported that BC's weekly domestic overnight visitation increased +147% compared to the same period in 2021, +132% compared to the same week in 2020, and decreased -1% compared to the same week in 2019.
- All tourism regions showed growth in domestic visitation when compared to the same period in 2021 and 2022.



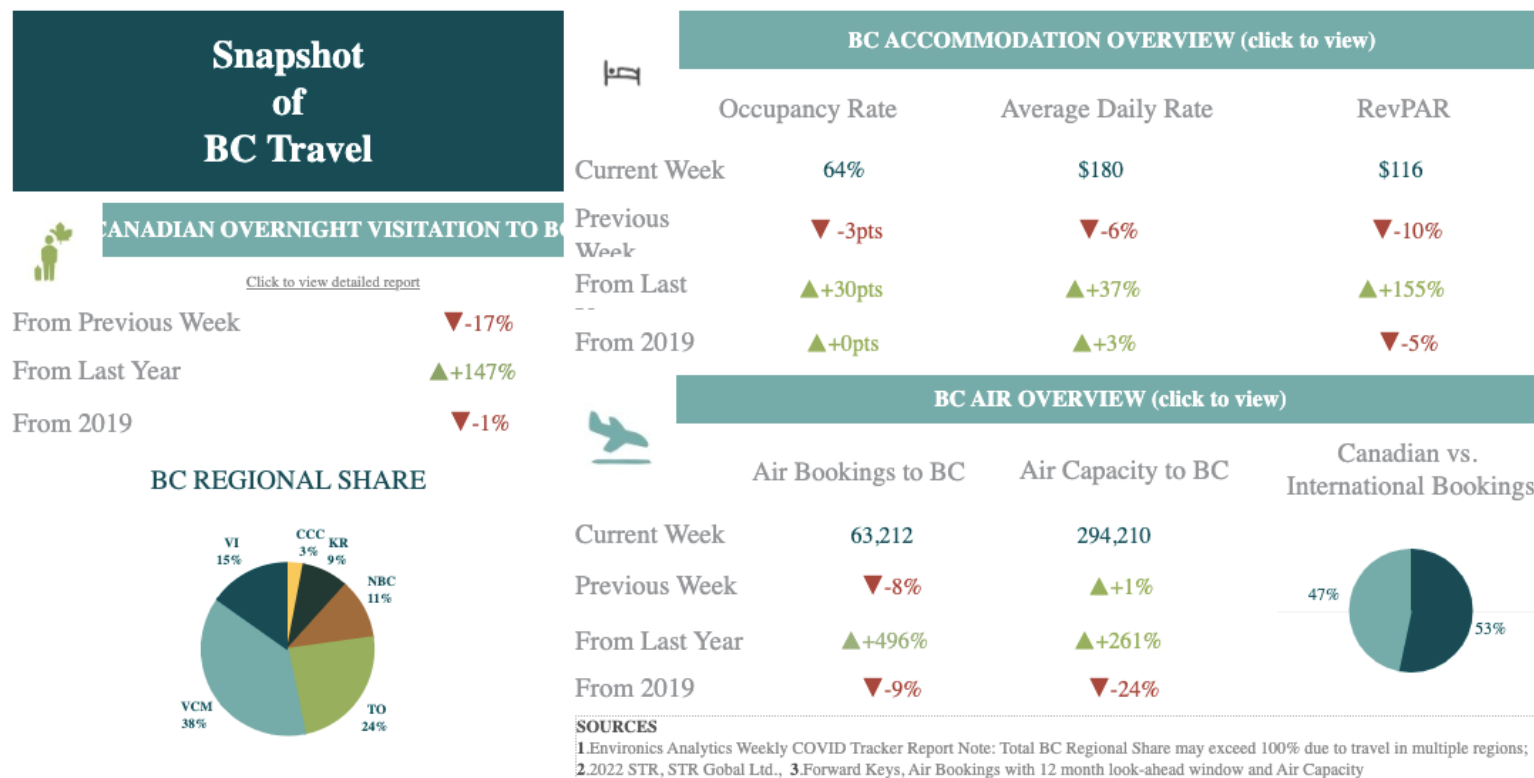
BC's occupancy rate (64%) increased +30 points compared to the same period in 2021

- STR, an agency which reports BC's hotel performance, shows the average weekly occupancy rate for BC was 64% for the week of April 18 - 24, 2022. This represents an increase of +30 points compared to a similar period in 2021 and remains consistent to the levels seen in a similar period in 2019.
- BC's Average Daily Rate for this same period was \$180, an increase of +37% from 2021 and +3% compared to a similar period in 2019.
- For community-level accommodation statistics please visit [Destination BC's Snapshot of BC Travel](#).



Destination BC's latest Snapshot of BC Travel shows Vancouver, Coast & Mountains region made up 38% of domestic overnight visitation

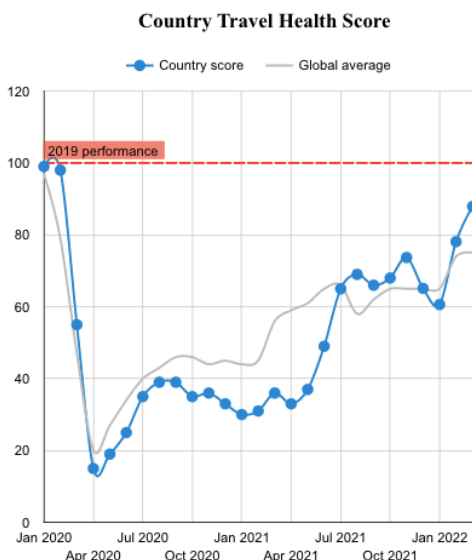
- According to Destination BC's Snapshot of BC Travel, for the week of April 18 – 24, 2022 the Vancouver, Coast & Mountains region made up 38% of BC's domestic overnight visitation. In comparison, the Thompson Okanagan region made up 24% of BC's domestic visitation and the Vancouver Island region made up 15%.
- During this same week 63,212 air bookings were made to BC. Of these air bookings, 53% were domestic flights and 47% were international. Air capacity to BC increased +1% from the previous week and +261% compared to the same period in 2021.



Source: [Snapshot of BC Travel, Destination BC, Apr 18, 2022](#)

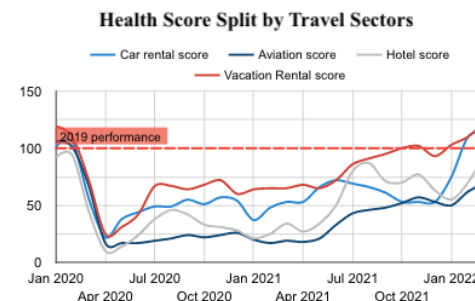
Skift reports that Canada's Global Recovery Index score is at 87.9 out of 100

- According to Skift, in March 2022 the Global Recovery Index (an overall index of travel performance recovery based on factors such as car rentals, flights, and lodging) is at 75 out of baseline of 100 established in 2019. This is an increase of +1 point from February. Canada's Global Recovery Index score in March 2022 is 87.9, an increase of +9.8 points from February.
- This improvement in Canada's travel sector is from increases in various industries. As of April 16, Skift's measured Aviation performance in Canada increased by +7 points compared to the same period one month earlier, hotel performance increased by +24 points, Car Rental performance increased by +3 points, and Vacation Rental performance increased by +13 points.



Country Deep Dive

Select a country: Canada (1)

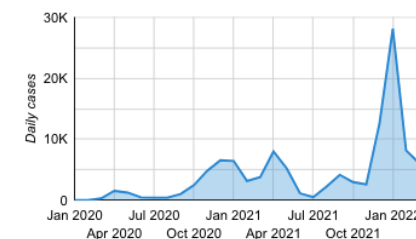


Most Recent Month-over-Month Changes

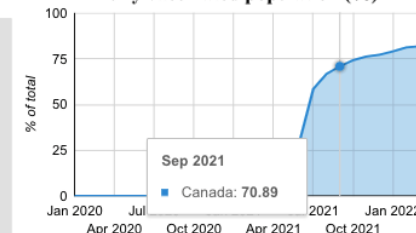
Month-over-month change in sector scores - Actual points change and % change

Aviation		Hotels	
5.3	8.4%	22.9	32.2%
Car Rental		Vacation Rentals	
3.0	2.7%	11.4	10.2%

New daily Covid-19 cases (monthly average)



Fully vaccinated population (%)



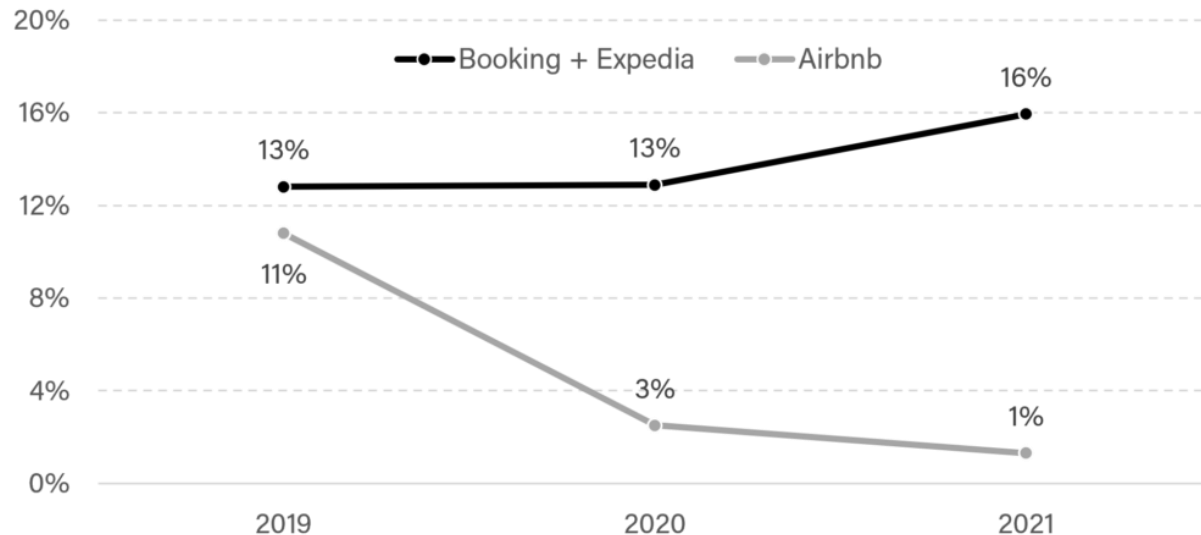
Source: [Skift Recovery Index Canada Deep Dive, Apr 16, 2022](#)

Skift reports that Google is increasingly the first website for travel related questions

- According to Skift Research, the pandemic has created an even greater reliance on Google within the travel industry with a higher percentage of online travel searches beginning on the platform.
- In 2019, Expedia and Bookings.com spent 13% of their combined revenue on Google advertising. This increased to 16% in 2021. Meanwhile Airbnb has managed to decrease its reliance on Google over the course of the pandemic.

Airbnb has Moved Away From Google, Despite Similar Starting Point as Expedia and Booking

Google Ad Spend as a % of OTA Revenue



Source: Skift Research, Company Filings. Data as of April 2022.

Source: [Skift_Google Impact on Travel - April 2022](#)

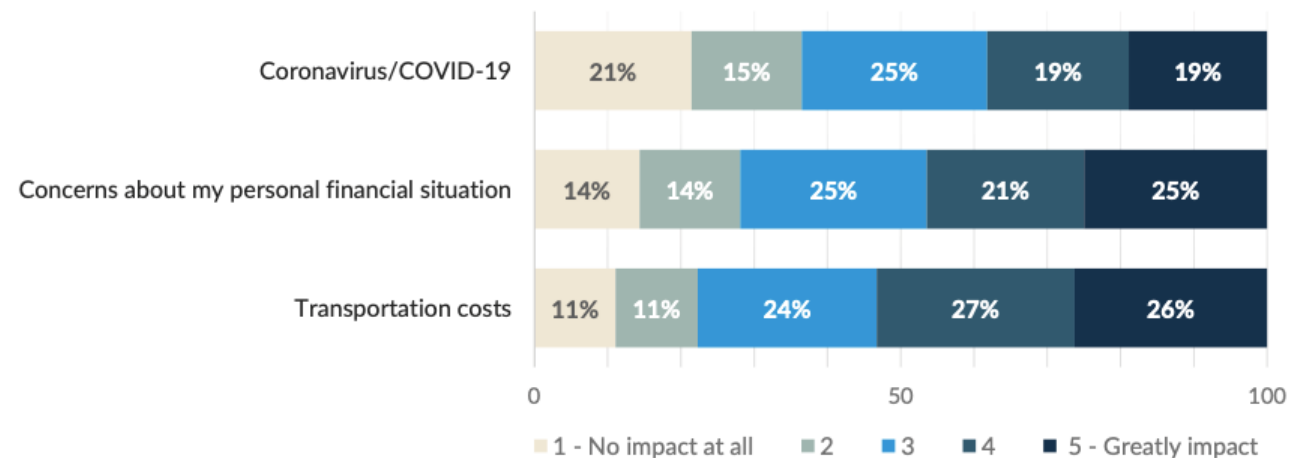


Longwoods reports that transportation costs are impacting Americans' travelling decisions more than COVID-19

- According to Longwoods' latest Travel Sentiment Study Wave 60 report (April 20, 2022), transportation costs are impacting American travellers' decisions to travel in the next six months.
- 26% of American travellers are greatly impacted by transportation cost in their decisions to travel. In comparison, only 19% of American travellers are greatly impacted by COVID-19. Additionally, 21% of travellers say they are not impacted by COVID-19 at all in their travel decisions within the next 6 months.

IMPACT ON TRAVEL PLANS

Factors Impacting Decisions to Travel in Next Six Months



Travel Sentiment Study Wave 60

Longwoods INTERNATIONAL | miles PARTNERSHIP



Source: [Longwoods Travel Sentiment Survey Wave 60 - Apr 20, 2022](#)

Destination Analysts reports 81.5% of American travellers feel safe travelling outside the United States

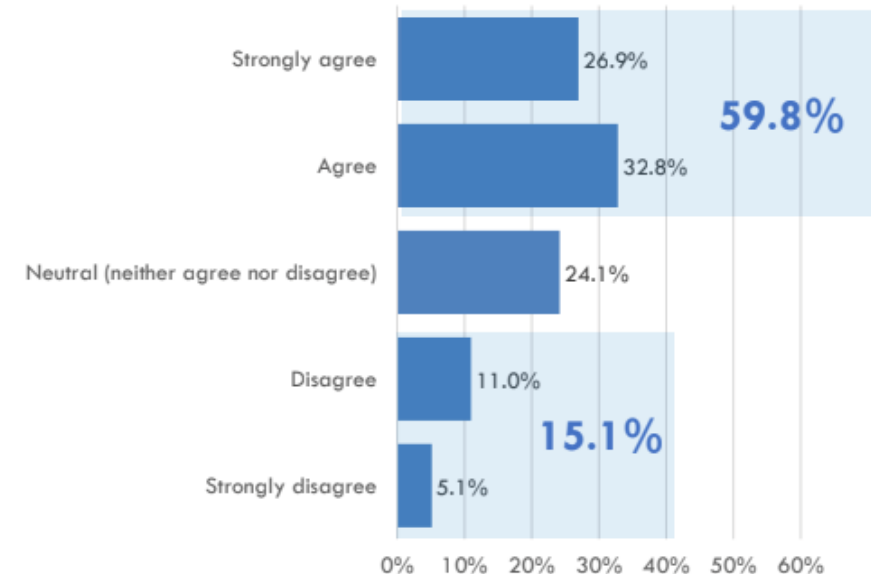
- According to Destination Analysts' latest State of the American Traveller report (April 5, 2022), 59.8% of American travellers agreed that 'if gasoline prices don't come down, I'll be staying closer to home on my road trips this spring/summer'.
- The same research showed that 15.1% of American travellers disagreed with this statement and won't be affected by current gas prices.

GASOLINE PRICES & TRAVEL DISTANCE FROM HOME

How much do you agree or disagree with the following statements?

Question: If gasoline prices don't come down, I'll be staying closer to home on my road trips this spring/summer?

(Base: All respondents, 4,007 completed surveys.
Data collected March 15-23, 2022.)



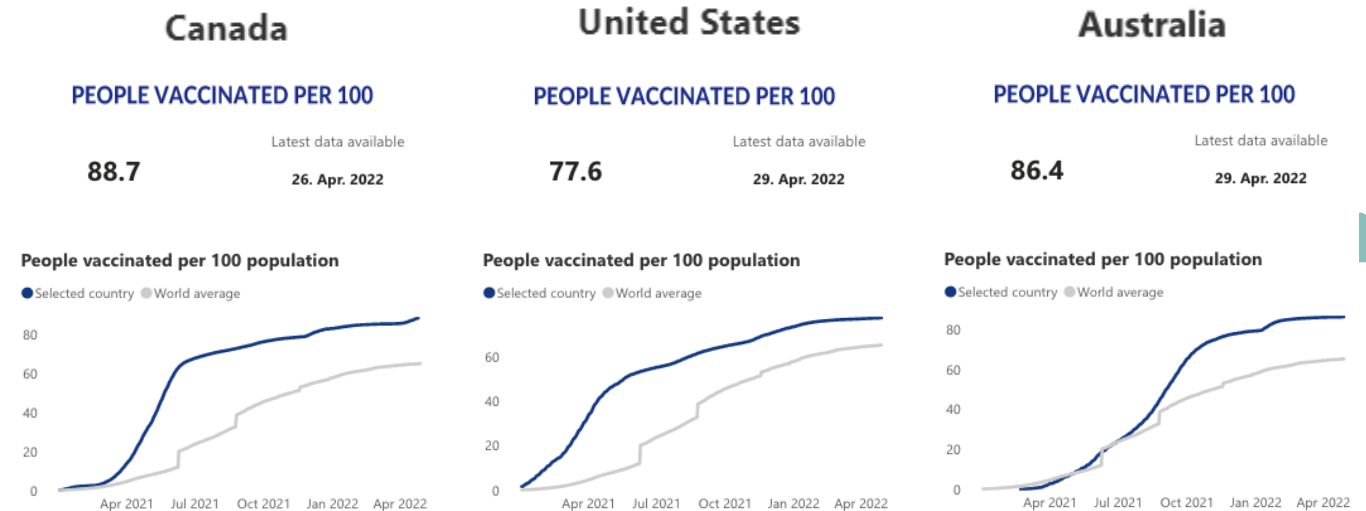
Destination Analysts
DO YOUR RESEARCH



Source: [Destination Analysts State of the American Traveller - Apr 5, 2022](#)

UNWTO shows that 65.4% of the global population has received at least one dose of a vaccine

- According to the UNWTO, as of April 29, 2022, the global average for vaccination rates (with at least one dose) is at 65.4 out of every 100 people.
- The same dashboard shows that as of April 29, 2022, Canada has vaccinated (with at least one dose) 88.7 out of every 100 people, compared to the US which has vaccinated 77.6 out of every 100 people, and Australia which has vaccinated 86.4 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, Apr 29, 2022](#)

A summary of relevant tourism headlines from around the world

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

- [World Tourism Organization members vote to suspend Russia](#) (UNWTO)
- [Canada Further Eases Travel Restrictions Effective April 25](#) (Travel Pulse Canada)
- [Canada will keep mask mandate for planes](#) (Skift)
- [Tour operators aren't rushing to ditch mask mandates](#) (Skift)
- [The TSA and airlines are no longer enforcing the mask mandate](#) (Forbes)
- [UNWTO calls on start-ups to join "Awake Tourism Challenge"](#) (UNWTO)



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.





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

Research & Analytics
TourismResearch@DestinationBC.ca