The Thompson Okanagan Tourism Association is actively monitoring the impact of COVID-19 on the tourism industry through our partnerships with the BC Regional Tourism Secretariat and the British Columbia Hotel Association.

We are sharing information with our stakeholders through a series called Research Roundup, which includes custom reports from our research program and highlights from a variety of sources including:

- Destination Canada
- Destination BC
- Travel and Tourism Research Association
- Destination Analysts
- UNWTO
- BCHA/STR/BCRTS
- Destination Think

Learn more about the Thompson Okanagan Tourism Resiliency Program [https://www.totabc.org/tourism-resiliency](https://www.totabc.org/tourism-resiliency)
THOMPSON OKANAGAN RESEARCH ROUNDUP
Key Findings:

**Note:** British Columbia declared a provincial state of emergency on Wednesday, March 18, 2020.

• The week of April 19 saw the lowest number of Domestic Overnight Visitation, decreasing by 82% compared to the same week in 2019.

• **Note:** The Thompson Okanagan saw a 3% decrease in visitation compared to British Columbia during **Week 30** (August 24-30).

• Visitation to the Thompson Okanagan decreased by 39% and British Columbia decreased by 14% when comparing **Week 29** (August 17-23) to **Week 30** (August 24-30).

Source: BC Regional Tourism Secretariat
Measuring Canadian Travel Patterns - Thompson Okanagan Region
2020 PRIZM SEGMENT SUMMARY

ASIAN AVENUES

General Canadian Summary:

• Urban, middle-income Asian families and singles with children over the age of 25
• Mixed Education (high school/college degree)
• White-collar and service jobs
• Value the maintenance of their cultural traditions, community involvement and sharing their opinions on products/services with family and friends
• Top Geography: Vancouver, Burnaby, Toronto, Ottawa, Montréal
• EQ Type: Personal History Explorer

Household Count: Of the 67 PRIZM Segments identified in Canada, Asian Avenues rank 7th, making up 81,208 households, or 4% of the total households in British Columbia (2,010,897).

Maintainer Age: Median Household Maintainer Age is 53.

Children at Home: 53% of couples have children living at home.

Household Income: Average Household Income of $102,300 compared to BC at $106,681.

Top Social Value: Confidence in Advertising: A tendency to trust and use advertising as a source of reliable information. Also, a tendency to identify with the fashions and the role models promoted by advertising and the consumer society.

Media Habits:

• 13hrs/week listening to the radio, 18hrs/week watching TV, 3hrs/week reading the newspaper and 4 hrs/day on the Internet. Daily Magazine usage is minimal (11 min/day).
• 75% currently use Facebook, 42% use Instagram and 23% use Twitter.
DOMESTIC OVERNIGHT VISITORS – YEAR OVER YEAR VARIATION
B.C. REGIONS

Key Findings:

Note: British Columbia declared a provincial state of emergency on Wednesday, March 18, 2020.

The week of April 19 (Week 11) saw the largest drop in domestic overnight visitors in British Columbia, dropping 82% from the previous year. Findings are consistent across all BC Subregions.

While overnight travel is significantly down compared to 2019, an upward trend in movement and overnight stays on a week over week bases was apparent during Weeks 12, 13, 14, 16, 17, 18, 20, 22, 24, 25, 26, 27 and 28.

All of the BC Regions saw a decrease in visitation from Week 29 (August 17-23) to Week 30 (August 24-30).

- The Cariboo Chilcotin Coast, Northern BC, Vancouver Island and Vancouver Coast and Mountains saw an increase in visitation over British Columbia during Week 30 (August 24-30).
- The Thompson Okanagan and the Kootenay Rockies saw a decrease in visitation compared to BC during Week 30 (August 24-30).

Source: BC Regional Tourism Secretariat
Measuring Canadian Travel Patterns- Thompson Okanagan Region
For the week of August 23, 2020, British Columbia hotel occupancy, average daily rate (ADR), and revenue per available room (RevPAR) is significantly lower when compared the same time period last year.

- British Columbia had a 52% occupancy from Monday-Friday and a 57.2% occupancy during the weekend
  - Compared to the week of August 25, 2019, total occupancy is down -35.9%
- British Columbia had an ADR of 150.32 from Monday-Friday and an ADR of 162.41 during the weekend
  - Compared to the week of August 25, 2019, total ADR is down -29.1%
- British Columbia had a RevPAR of 78.18 from Monday-Friday and a RevPAR of 82.37 during the weekend
  - Compared to the week of August 25, 2019, total RevPAR is down -54.6%

Source: STR/BCHA/BCRTS Destination Weekly Report Week of August 23, 2020
BC RESIDENT SENTIMENT TOWARDS VISITORS

As of August 25, 2020, BC resident sentiment towards all levels of domestic visitors has remained stable when compared to the previous week, but experienced slight decreases.

- **57%** of BC residents would welcome visitors from other nearby communities, an increase of **6%** from August 18 - 25
- **50%** of BC residents would welcome visitors from other parts of BC, an increase of **4%** from August 18 - 25
- **34%** of BC residents would welcome visitors from other parts of Canada, an increase of **8%** from August 18 - 25
- **5%** of BC residents would welcome visitors from the United States, a decrease of **3%** from August 18 - 25
- **8%** of BC residents would welcome visitors from other countries, a decrease of **1%** from August 18 - 25

For more information visit [Destination Canada](https://www.destinationcanada.org)
As of August 25, 2020, BC resident advertisement receptivity towards promoting their community as a tourism destination has increased domestically and decreased internationally.

- 40% of BC residents would feel happy to see their community promoted as a destination to other nearby communities, an increase of 3% from August 18 - 25
- 32% of BC residents would feel happy to see their community promoted as a destination to other parts of BC
- 22% of BC residents would feel happy to see their community promoted as a destination to other parts of Canada, an increase of 1% from August 18 - 25
- 5% of BC residents would feel happy to see their community promoted as a destination to the United States, a decrease of 1% from August 18 - 25
- 6% of BC residents would feel happy to see their community promoted as a destination to other countries, a decrease of 1% from August 18 - 25

Read the full report Destination Canada Weekly COVID-19 Resident Sentiment
For more information visit Destination Canada
Destination Canada estimates BC will see a massive reduction in international tourism export revenue from January to September 2020 compared to 2019.

- Destination Canada estimates a $3,543 million loss or a -79% reduction in tourism export revenue from January-September 2020 in British Columbia.
  - In 2019, British Columbia tourism export revenue was $4,490 million.
- Nova Scotia has the highest reduction in tourism export revenue with -88%, dropping by $380.8 million in 2020.
- Quebec has the lowest reduction in tourism export revenue with -78% decrease, followed closely by British Columbia at -79% and Manitoba also at -79%.
INTERNATIONAL RESEARCH ROUNDUP
Every week since March 15th, Destination Analysts has surveyed 1,200+ American travelers about their thoughts, feelings, perceptions and behaviors surrounding travel in the wake of the coronavirus pandemic, and explored a variety of topics. The findings presented below represent data collected August 28th-30th.

- The perception of travel activities as unsafe is the lowest it has been since June 15th.
- Although sentiment is turning more positive, the pandemic is nevertheless still impacting travel at a high rate.
- Americans may need more information and assurances to move them to take trips, as 46.1% report that they are “not very” or “not at all” confident that they can travel safely in the current environment. In comparison, 29.7% feel confident or very confident they can travel safely.
- 49% of American travelers have cancelled a trip due to COVID-19.
- Americans have also demonstrated improvement in their state of mind around travel readiness, and Fall travel expectations improved to 35.9% from a low of 29.8% last week.
- Americans with trips planned for the remaining 4 months of 2020 showed the most enthusiasm for beaches and mountains—the latter notably higher than what was typical pre-pandemic.
COVID-19 IMPACT ON CANADIAN HOTEL INDUSTRY

STR data for August 23-29, 2020 showed lower performance from weeks prior for Canada’s Hotel Industry

- British Columbia (53.5%) and Prince Edward Island (55.8%) reached a 50% occupancy level
- Ottawa (43.4%) was the only major market at or above the 40% mark.
- The lowest occupancy among provinces was reported in Quebec (32.4%). At the market level, the lowest occupancy was reported in Montreal (22.0%).

In comparison with the week of 25-31 August 2019, the industry reported the following:

- Occupancy: **-45.2%** to 42.1%
- Average daily rate (ADR): **-25.9%** to CAD 128.83
- Revenue per available room (RevPAR): **-59.4%** to CAD 54.26

Read the full report STR: Canada Hotel Results for Week Ending August 29
For more information visit STR
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