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THOMPSON OKANAGAN
TOURISM ASSOCIATION

Thompson Okanagan Tourism Resiliency Program **Research Roundup**

October 2, 2020

Thompson
Okanagan
Tourism
Resiliency
Program



THOMPSON OKANAGAN RESEARCH ROUND UP

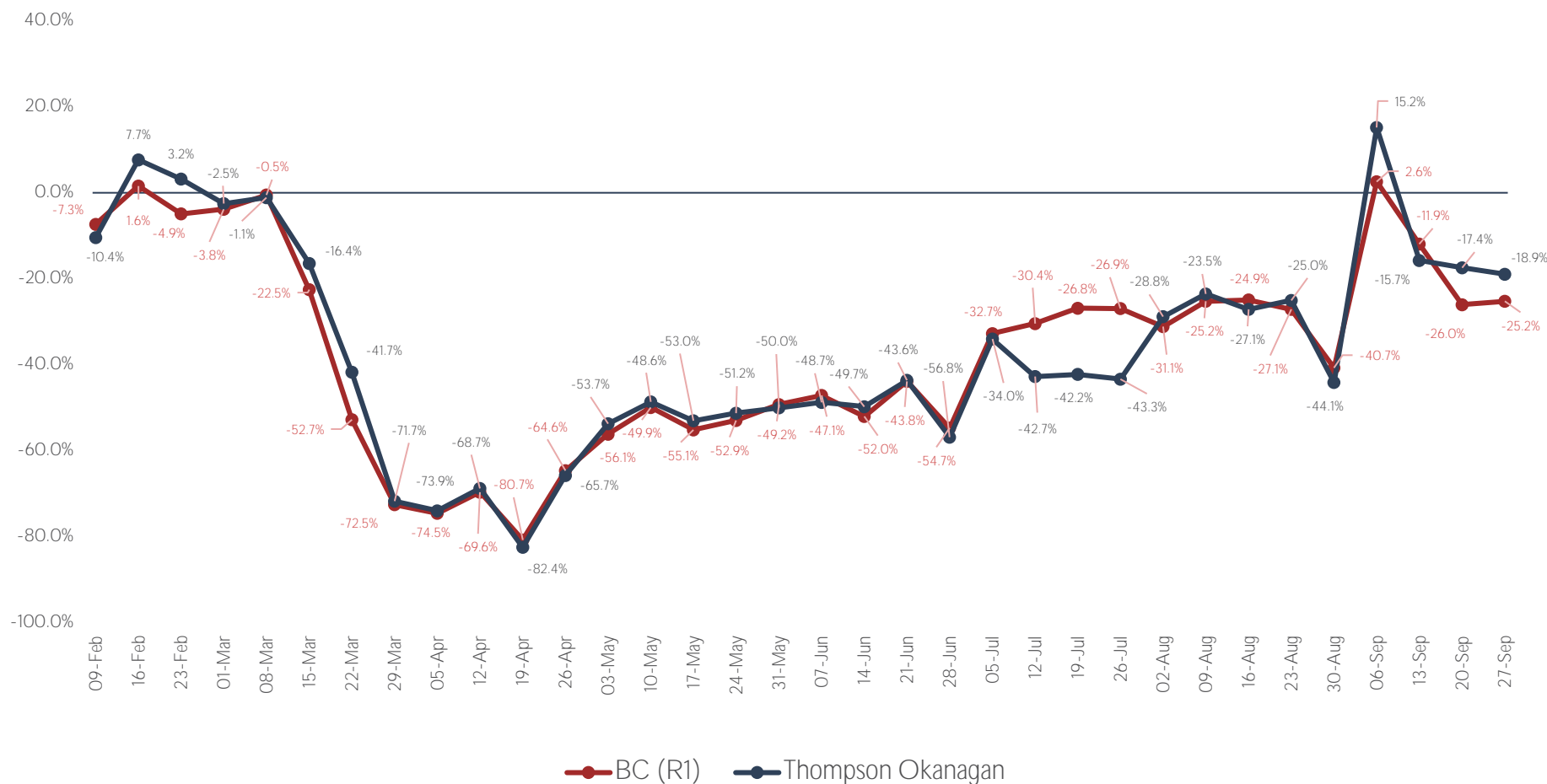
- The Thompson Okanagan Tourism Association is actively monitoring the impact of COVID-19 on the tourism industry through our partnerships with the BC Regional Tourism Secretariat and the British Columbia Hotel Association
- We are sharing information with our stakeholders through a series called **Research 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>

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THOMPSON OKANAGAN RESEARCH ROUNDUP

DOMESTIC OVERNIGHT VISITORS – YEAR OVER YEAR VARIATION

THOMPSON OKANAGAN REGION



Key Findings:

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

- The week of **April 19th** saw the lowest number of Domestic Overnight Visitation, decreasing by **82%** compared to the same week in 2019.
- The Week of **September 6th** saw the highest number of Domestic Overnight Visitation since the beginning of the COVID-19 Pandemic, increasing to positive **15.2%** compared to the same week in 2019.
- Note:** The Thompson Okanagan saw a **6% increase** in visitation compared to British Columbia during **Week 34** (September 21-27).
- Visitation to the Thompson Okanagan decreased by **2%** and British Columbia increased by **0.8%** when comparing **Week 33** (September 14-20) to **Week 34** (September 21-27).



**SYMPHONY
TOURISM
SERVICES**
INSPIRED NAVIGATION

Source: BC Regional Tourism Secretariat
Measuring Canadian Travel Patterns- Thompson Okanagan Region

Note: Data is compared on a week by week basis and may not reflect the exact same date range year over year

bcrts
British Columbia
Regional Tourism
Secretariat

BRITISH COLUMBIA RESEARCH ROUNDUP



2020 PRIZM SEGMENT SUMMARY

FRIENDS AND ROOMIES

General Canadian Summary:

- Younger, diverse lower-middle-income city dwellers
- Mixed Education (High School/University)
- Service Sector and White-Collar positions
- Value in-person and online entertainment, music, podcasts and video games
- Top Geography: Victoria, Saskatoon, Regina, Kingston, Fredericton
- EQ Type: Cultural Explorer

Source: Environics PRIZM Marketer's Guide 2020

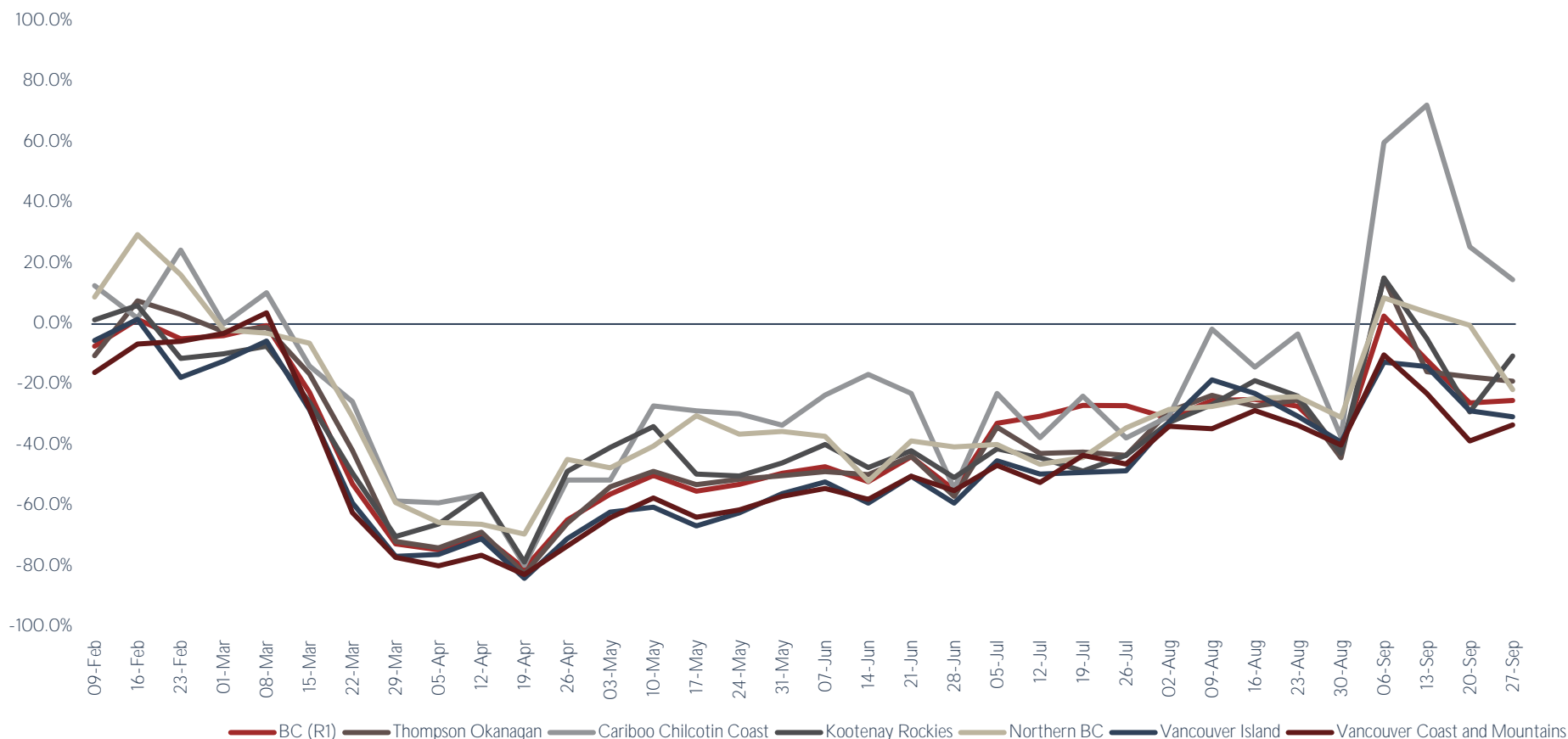


Category	British Columbia Highlights
Household Count	Of the 67 PRIZM Segments identified in Canada, Friends & Roomies rank 10th, making up 71,682 households, or 4% of the total Households in British Columbia (2,010,897)
Maintainer Age	Median Household Maintainer Age is 46
Children at Home	56% of couples have children living at home
Household Income	Below Average Household Income of \$73,285 compared to BC at \$106,681
Top Social Value	Top Social Value: Multiculturalism - The openness toward the diverse cultures, ethnic communities and immigrants that make up Canada. A belief that ethnic groups should be encouraged to preserve their cultural identities, and that others should seek to learn about them
Media Habits	<ul style="list-style-type: none">• On average, Friends & Roomies from British Columbia spend 12hrs/week listening to the Radio, 19hrs/week watching TV, 1hr/week reading the Newspaper and 4hrs/day on the Internet. Daily Magazine usage is minimal (9 min/day)• 80% currently use Facebook, 43% use Instagram and 42% use Twitter

Source:
Environics
Analytics-
Envision 2020

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 **81%** from the previous year. Findings are consistent across all BC Subregions.

The Week of **September 6th** saw the highest number of Domestic Overnight Visitation in British Columbia since the beginning of the COVID-19 Pandemic, increasing by **2.6%** compared to the same week in 2019.

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, 28, 31, 34.

All of the BC Regions saw a **decrease** in visitation from **Week 33** (September 14-20) to **Week 34** (September 21-27) with the exception of the Kootenay Rockies and Vancouver, Coast & Mountains which saw an **increase**.

- The Thompson Okanagan, Cariboo Chilcotin Coast, Kootenay Rockies and Northern BC saw an **increase** in visitation compared to British Columbia, Vancouver Island and Vancouver, Coast & Mountains saw a **decrease** during **Week 34** (September 21-27).

Note: Data is compared on a week by week basis and may not reflect the exact same date range year over year



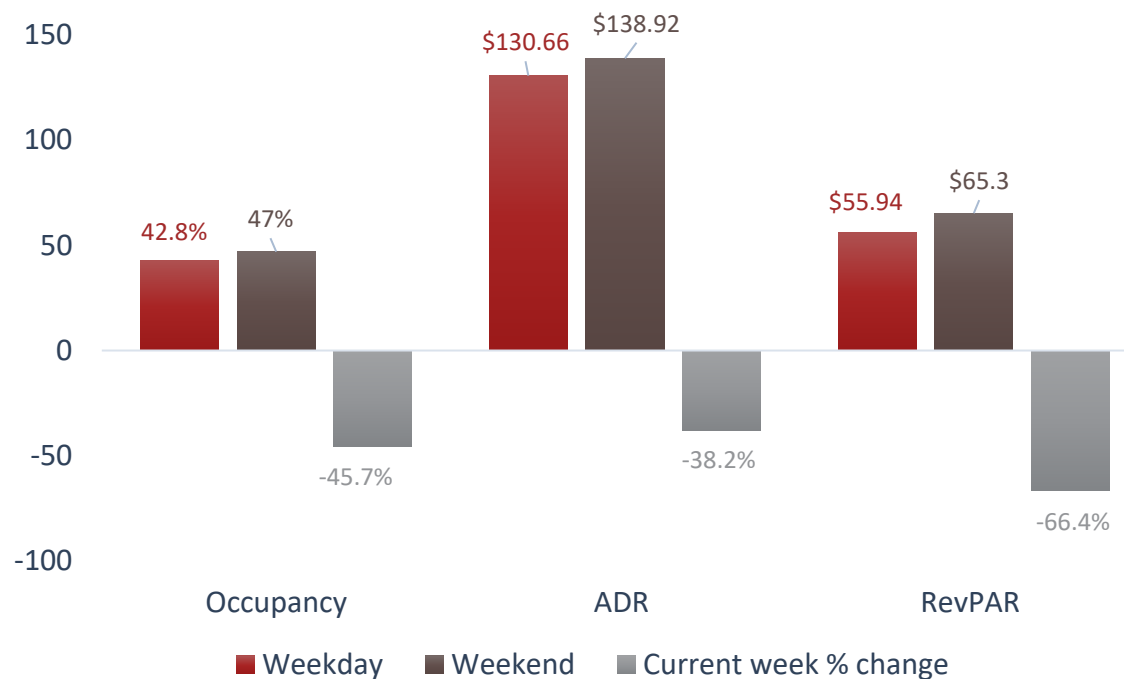
**SYMPHONY
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Source: BC Regional Tourism Secretariat
Measuring Canadian Travel Patterns- Thompson Okanagan Region

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SEPTEMBER 20 - 26 BRITISH COLUMBIA SUMMARY

- British Columbia had a **42.8%** occupancy from Monday-Friday and a **47%** occupancy during the weekend
 - Compared to the week of September 22, 2019, total occupancy is down **-45.7%**
- British Columbia had an ADR of **\$130.66** from Monday-Friday and an ADR of **\$138.92** during the weekend
 - Compared to the week of September 22, 2019, total ADR is down **-38.2%**
- British Columbia had a RevPAR of **\$55.94** from Monday-Friday and a RevPAR of **\$65.30** during the weekend
 - Compared to the week of September 22, 2019, total RevPAR is down **-66.4%**

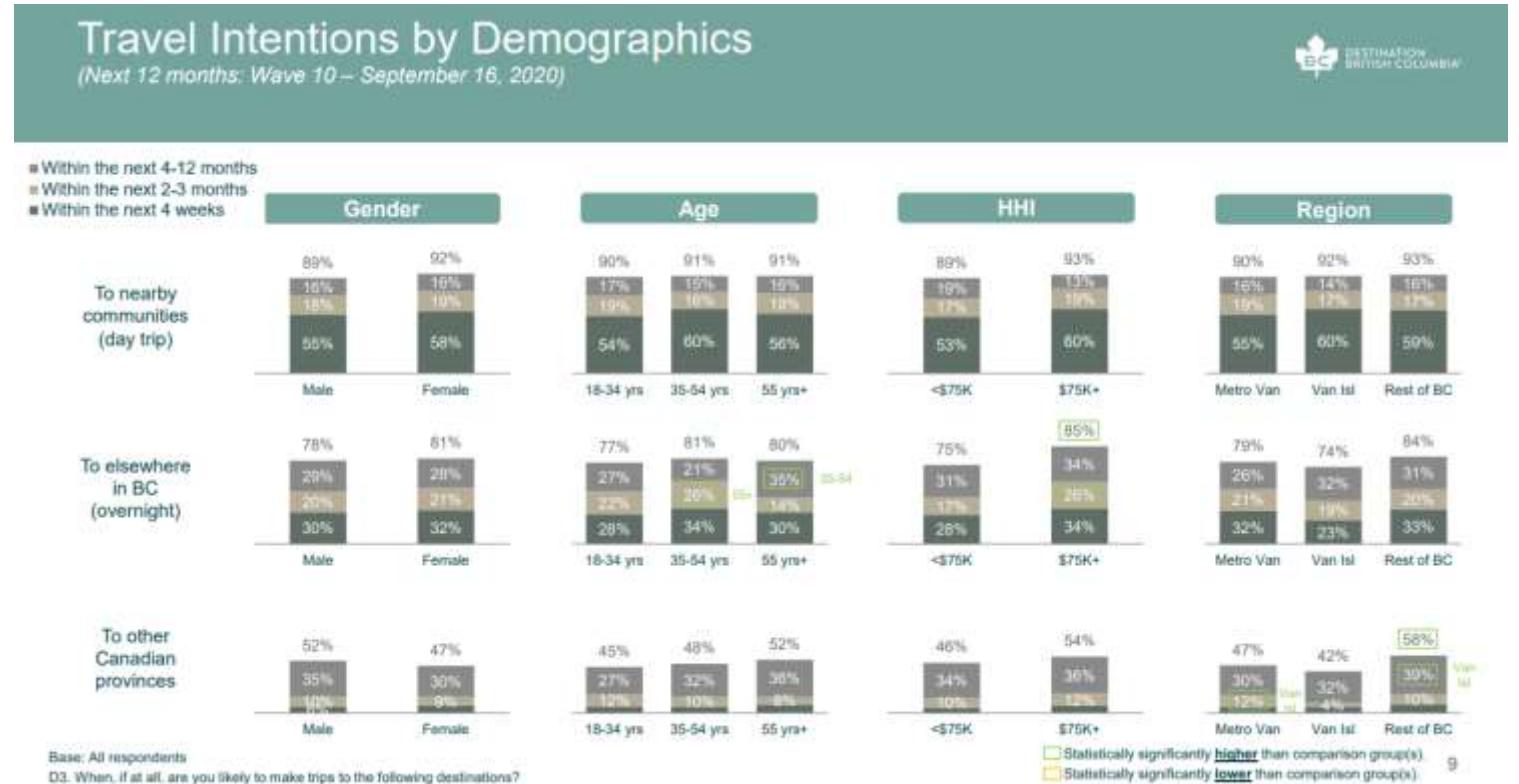


BC RESIDENT'S PUBLIC PERCEPTIONS: COVID-19 TRAVEL AND TOURISM

DESTINATION BC: DATA PROVIDED BY INSIGHTS WEST

Travel Intentions Summary

- BC residents' intentions to travel within their surrounding area for a day trip, in the next 4 weeks, continues to be greatest (57%), compared to intentions to travel to other areas, such as to other parts of the province for an overnight trip (31%), to other provinces within Canada (7%), to the US (7%), or to other countries (1%).
- Compared to Wave 9, BC residents' intentions to travel within BC in the next 4 weeks has remained unchanged, as well as intentions to travel to other parts of Canada.
- Likelihood of travelling to the US or to other countries without a vaccine/treatment available continues to be low.



INTERNATIONAL RESEARCH ROUNDUP

AMERICAN TRAVEL IN THE PERIOD OF CORONAVIRUS

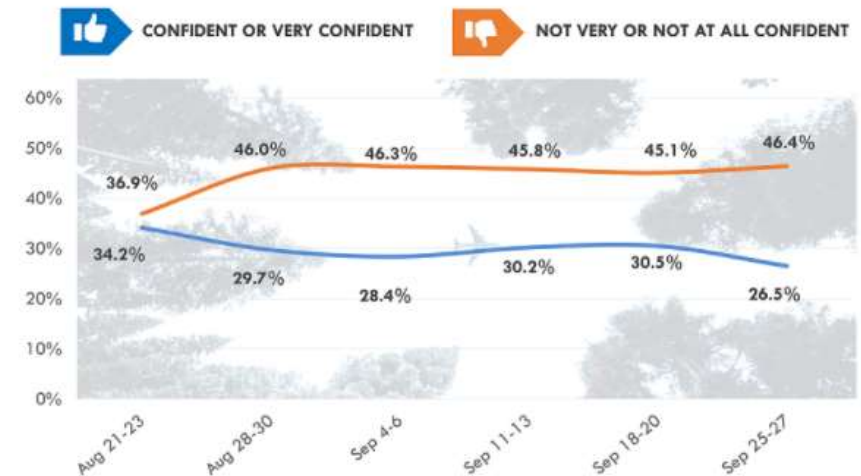
WEEK OF SEPTEMBER 28, 2020

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 September 25-27.

- After a month-long period of relatively lower levels of anxiety, the number of Americans with high degrees of concerns about contracting the coronavirus rose this week. Similarly, after a stable period in expectations for the virus' course, the percent of Americans who feel things will get worse in the U.S. in the next month increased.
- These rising concerns appear to be affecting confidence that travel can be done safely and perceptions of travel. The percent in a "ready to travel" mindset fell to 52.2% after being above 54% for the last month.
- Nevertheless, three-quarters of American travelers continue to report having at least tentative trip plans—primarily over the next 6 months—as well as exhibit a perception of travel as a means to meet their emotional needs. The percent that agree price cuts and discounts can motivate them to consider a new trip is as high as it has been during the pandemic.
- Looking at American travelers' specific expectations for Fall, nearly two-thirds expect to travel this season, and these travelers anticipate taking 1.7 overnight trips on average. The top motivations for these Fall trips are relaxation, spending time with family and escapism, although younger travelers are also likely to be seeking connecting with nature and having new experiences.
- Nearly 40% of likely Fall travelers say they will visit a small town or rural area on their Fall trips, with beach visitation less likely than in the summer months and urban travel increasing.
- Interest in workcations among those who can work remotely and schoolcations among parents who travel with children is at similar levels—just under half have a more elevated degree of interest. In total, 52.2% of those interested in schoolcations reported some likelihood to take one this Fall, while 46.0% of those interested in workcations said they were likely to actually take one in these coming months.
- American travelers' comfort with enjoying their own communities for leisure activities and having tourists visit their regions are at pandemic period highs.



CONFIDENCE IN TRAVELING SAFELY AUGUST 21 – SEPTEMBER 27



QUESTION: HOW CONFIDENT ARE YOU THAT YOU CAN TRAVEL SAFELY IN THE CURRENT ENVIRONMENT?

(Base: Wave 24-29 data. All respondents, 1,207, 1,250, 1,225, 1,205, 1,200 and 1,205 completed surveys.)



Read the full report [Update on Americans Travel for the Week of September 28, 2020](#)

For more information visit [Destination Analysts](#)



COVID-19 IMPACT ON CANADIAN HOTEL INDUSTRY

STR data for September 20-26, 2020 showed slightly **lower** performance from weeks prior for Canada's Hotel Industry. Year over Year declines also worsened

- **British Columbia** (44.0%) was the only province to reach or surpass a 40% occupancy level
- Among the major markets, Vancouver saw the highest occupancy levels (34.8%)
- The lowest occupancy among provinces was reported in Quebec (24.7%). At the market level, the lowest occupancy was reported in Montreal (19.0%).

In comparison with the week of September 22-28, 2019, the industry reported the following:

- Occupancy: 35.6% **(-53.7%)**
- Average daily rate (ADR): CAD 119.39 **(-32.8%)**
- Revenue per available room (RevPAR): CAD 42.46 **(-68.9%)**
- Occupancy for previous weeks came in at 37.0% (19 September), 39.8% (12 September) and 41.9% (5 September), respectively





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Contact: Simone Carlysle-Smith, Managing Director
Symphony Tourism Services, a subsidiary of the Thompson
Okanagan Tourism Association

778-721-5448

sts@totabc.com

<https://www.totabc.org/symphony-tourism-services>