



Tourism Vancouver Webinar

*Business Intelligence & Rebuilding
Demand for Vancouver*

February 10, 2021

Welcome



Your Host

Lucas Pavan, Tourism Vancouver Team Member
Manager, Membership & Dine Out Vancouver Festival





Taste the World, **Vancouver Style!**



February 5 - March 7, 2021

[Learn More](#)

- **DINEOUTVANCOUVER.COM**
- Over 360 Restaurants from across Metro Vancouver (new record)
- Safely support local community restaurants with your household bubble
- Participate in a virtual experience
- Earn a \$50 Visa Gift Card when you stay at a participating downtown Vancouver hotel

2021 Business Sprint

FOCUS AREAS

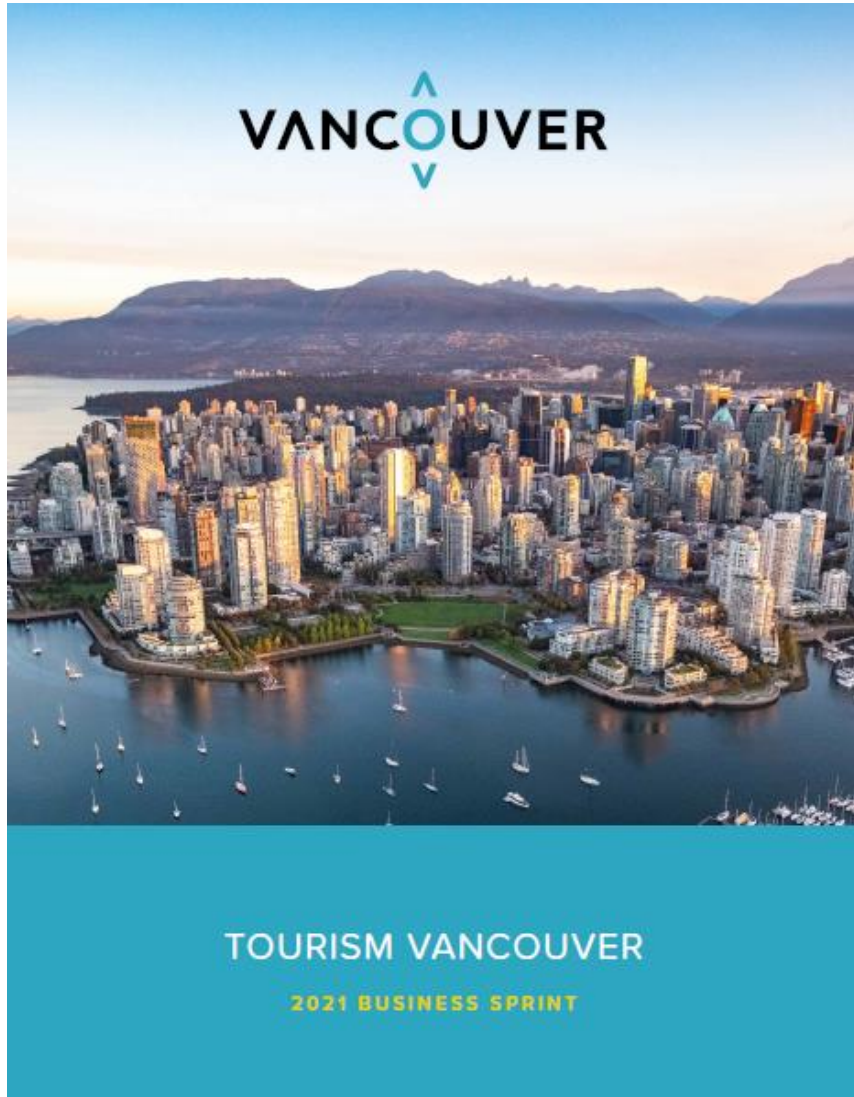
Rebuild Demand

Destination
Stewardship &
Advocacy

Organizational
Resilience

PRIORITIES

STRATEGIES



VAN
COU
VER

**To view our 2021 Business Sprint
visit:**

**[www.tourismvancouver.com/about/corporate-
documents/](http://www.tourismvancouver.com/about/corporate-documents/)**

Agenda - Part 1: Business Intelligence

(10:00AM – 10:45AM)

- Current destination performance
- Key indicators of forward-looking demand
- Available Traveller research highlights

Presented by:

Eugene Chu, Tourism Vancouver Team Member
Manager, Research & Business Analytics



Agenda- Part 2: Rebuilding Demand for Vancouver

(10:45AM – 11:30AM)

- Key Insights informing Tourism Vancouver Marketing plans
- Creative Concept and upcoming promotional activities
- How members can align and benefit from upcoming promotions

Presented by:

Candice Gibson, Tourism Vancouver Team Member
Manager, Marketing



Additional Housekeeping

- Use Q&A Feature to ask questions, and upvote questions asked that you find of interest to you.
- Presentation will be shared via Enews and online.
- Post Webinar Evaluation sent to all attendees.



Business Intelligence: Market and Consumer Insights

February 10, 2021

Eugene Chu

Manager, Research & Business Analytics

Outline - Today's Topics

1. Current destination performance
2. Key indicators of forward-looking demand
3. Available Traveller research



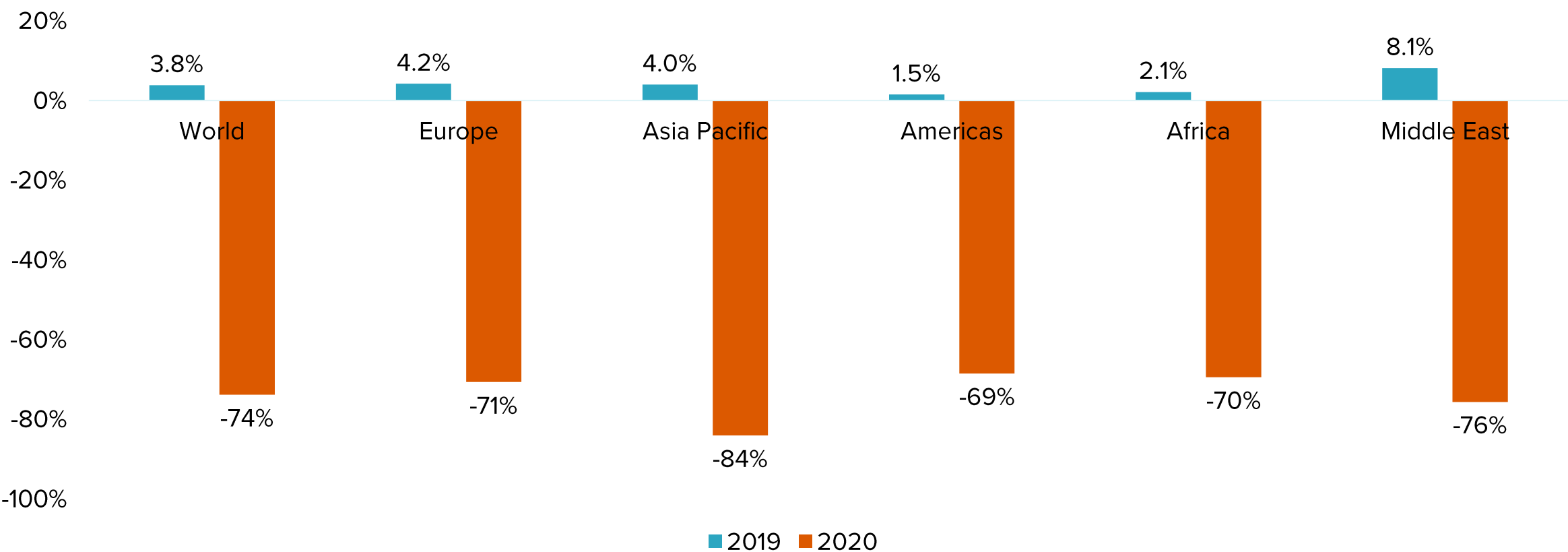
Current Destination Performance – 2020 to Present

Recap of International Tourism in 2020

Record breaking decline in global international tourism arrivals



International Tourist Arrivals (% Change)*



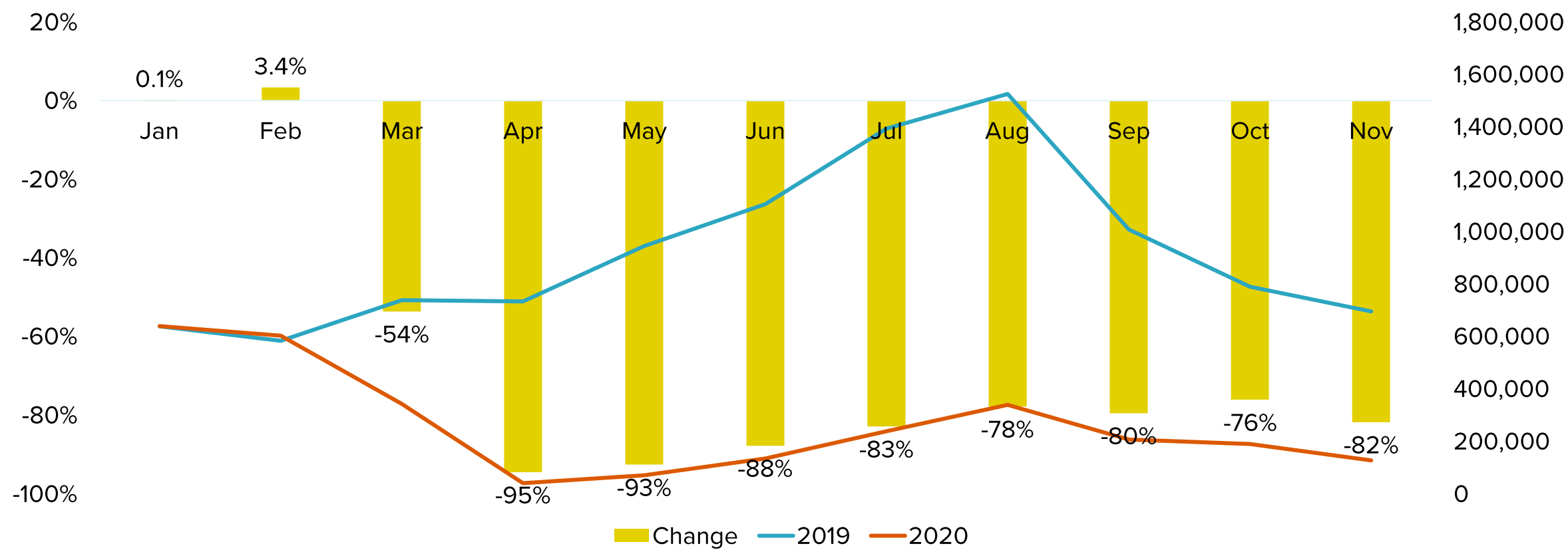
Note: Preliminary data.
Source: World Tourism Organization (UNWTO).

Vancouver's Destination Performance in 2020

Overnight Visitation

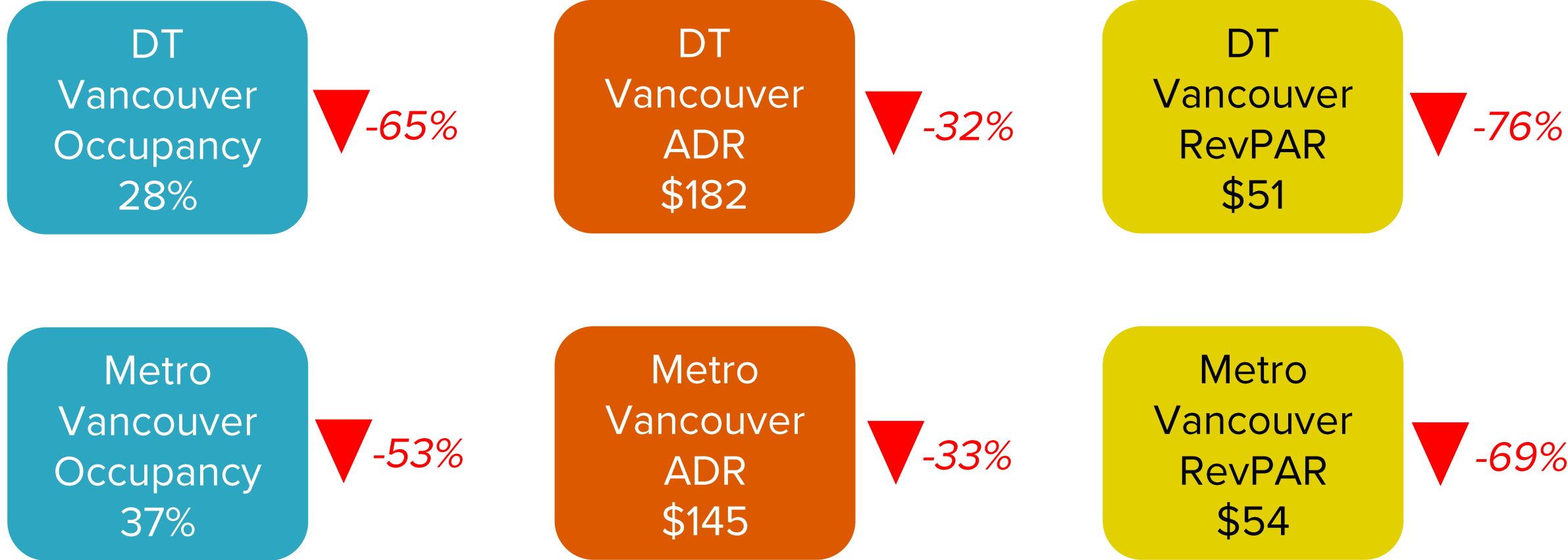


Total Overnight Arrivals to Vancouver*



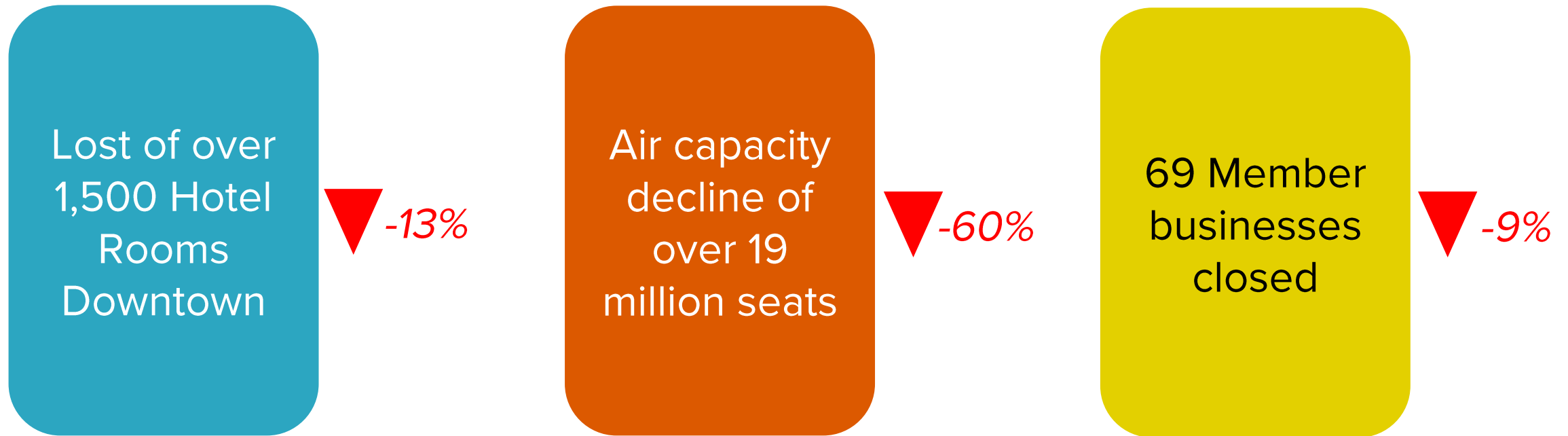
*Note: Preliminary data.
Source: Tourism Vancouver.

2020 Destination Hotel Performance



Source: STR/CBRE.

Impact on Destination Supply – Year-end 2020



2021 YTD (Jan) Destination Demand – Air Arrivals Total



Vancouver Total Air Arrivals YTD Jan 2021

TRIP ORIGINS	Year 0	Year -1	VAR% Y0 vs Y-1
Canada/CA	37 194	143 913	-74.2%
U.S.A./US	7 052	79 812	-91.2%
Mexico/MX	1 700	10 128	-83.2%
United Kingdom/GB	1 029	7 017	-85.3%
China/CN	842	23 500	-96.4%
South Korea/KR	694	6 195	-88.8%
Australia/AU	635	11 901	-94.7%
Germany/DE	604	2 396	-74.8%
Japan/JP	539	4 245	-87.3%
Others	9 619	43 941	-78.1%
Trip origins (selected)	59 908	333 048	-82.0%
Total Trips	59 908	333 048	-82.0%

Source: ForwardKeys.

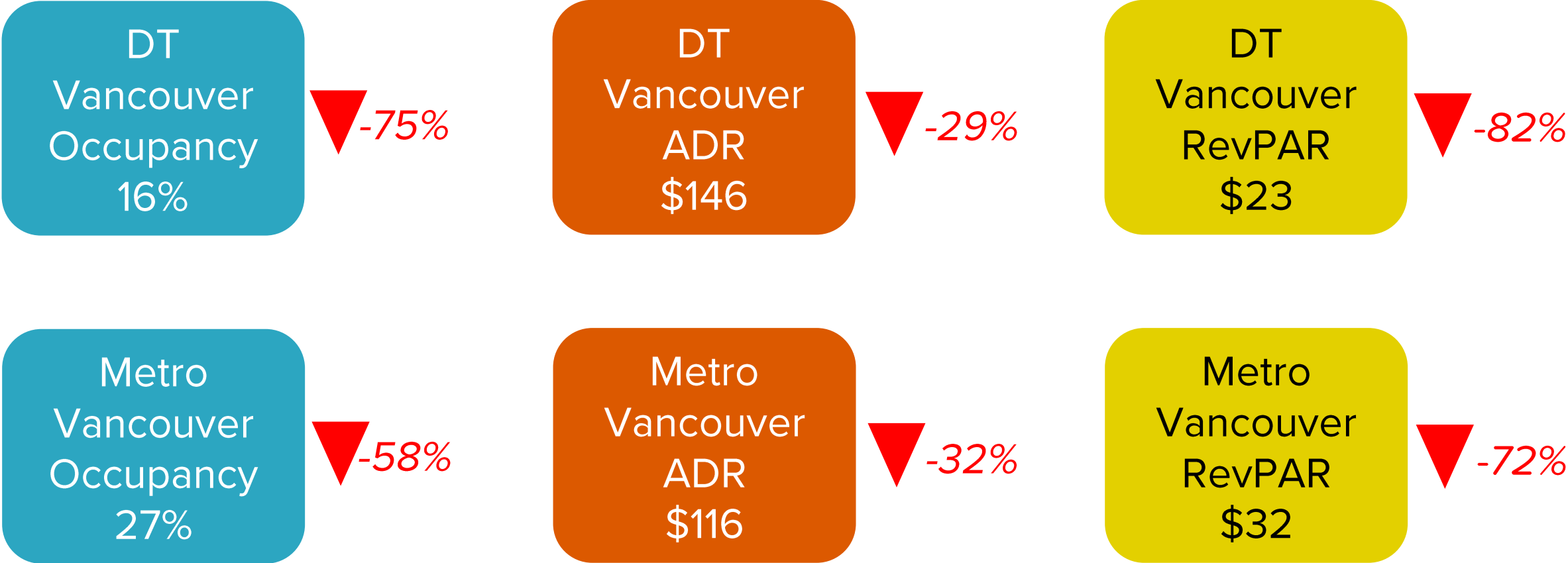
2021 YTD (Jan) Destination Demand – Domestic Air Arrivals

Vancouver Domestic Air Arrivals YTD Jan 2021

TRIP ORIGINS	Year 0	Year -1	VAR% Y0 vs Y-1
Toronto/YTO	10 575	33 876	-68.8%
Calgary/YYC	6 294	23 390	-73.1%
Edmonton/YEA	3 255	14 103	-76.9%
Montreal/YMQ	3 218	8 452	-61.9%
Winnipeg/YWG	1 707	5 409	-68.4%
Kelowna/YLW	1 679	10 373	-83.8%
Ottawa/YOW	1 478	4 836	-69.4%
Terrace/YXT	1 168	3 798	-69.2%
Prince George/YXS	975	4 658	-79.1%
Saskatoon/YXE	826	3 659	-77.4%
Fort St John/YXJ	787	2 492	-68.4%
Regina/YQR	623	2 604	-76.1%
Halifax/YHZ	436	1 315	-66.8%
Victoria/YYJ	413	3 661	-88.7%
Whitehorse/YXY	335	1 263	-73.5%
Others	3 425	20 024	-82.9%
Trip origins (selected)	37 194	143 913	-74.2%
Total Trips	37 194	143 913	-74.2%

Source: ForwardKeys.

2021 YTD (Jan) Destination Hotel Performance



Note: First 30 days (running MTD Jan).
Source: STR.



Key Indicators of Forward-Looking Demand

Integrated Partnership Approach



Signals Framework

Key Indicators of Destination Performance and Forward-Looking Demand



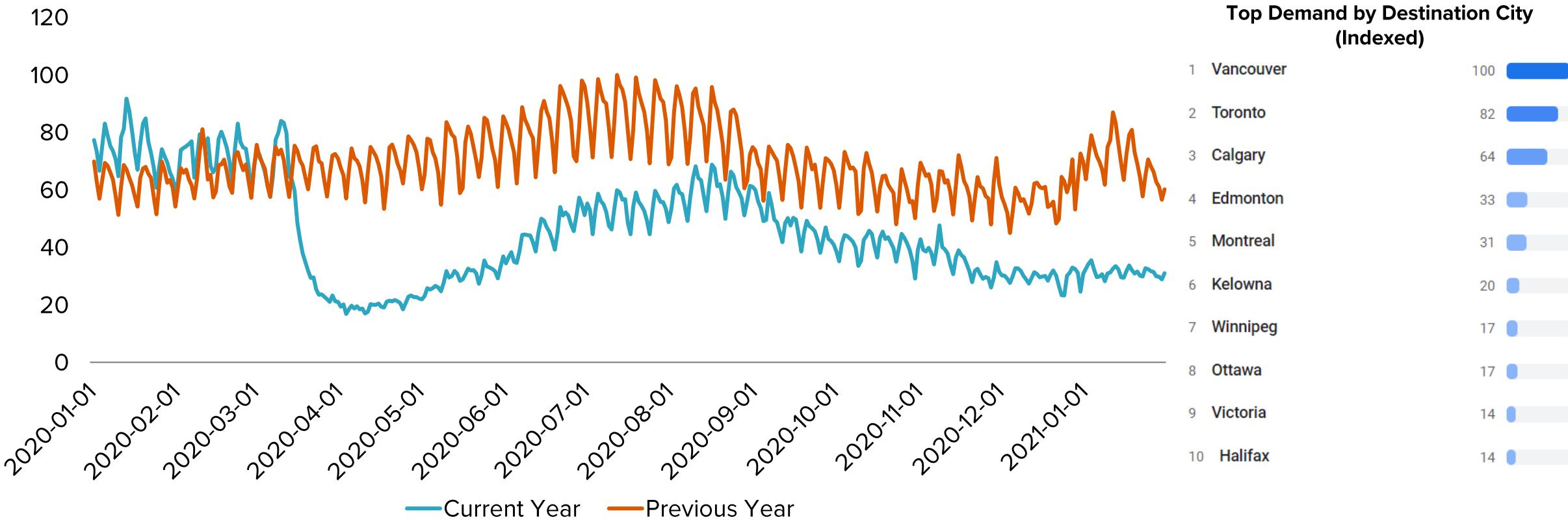
	Respond	Rebuild	Restart
Phase	Lockdown	Hyper Local / Provincial / Inter-Provincial	Canada / US / Overseas
Market Conditions	<ul style="list-style-type: none"> - COVID Case Count - Vaccination Rates - Resident Sentiment 	<ul style="list-style-type: none"> - Resident Sentiment - Economy (employment) - Consumer Confidence (safety & financial) 	<ul style="list-style-type: none"> - Resident Sentiment - Economy (employment, exchange rates) - Consumer Confidence (safety and financial) - Air Access
Leading Indicators – Consumer Intent & Behaviour	<ul style="list-style-type: none"> - Google search - Website traffic 	<ul style="list-style-type: none"> - Google search - Website traffic - Hotel bookings (future stay) - Available Traveller research - Destination Canada GTW - Destination BC research 	<ul style="list-style-type: none"> - Google search - Website traffic - Air bookings (forward-looking) - Available Traveller research (Canada) - Destination Canada GTW - Destination BC research - Expedia insights
Lagging Indicators - Destination Performance	<ul style="list-style-type: none"> - Overnight visitors - Hotel performance 	<ul style="list-style-type: none"> - Overnight visitors - Hotel performance 	<ul style="list-style-type: none"> - Overnight visitors - Air arrivals/border crossings - Hotel performance

Google Search Trends – Domestic Travel

Vancouver has the highest level of interest in Canada



Google Search Queries for Domestic Travel in Canada (Indexed)



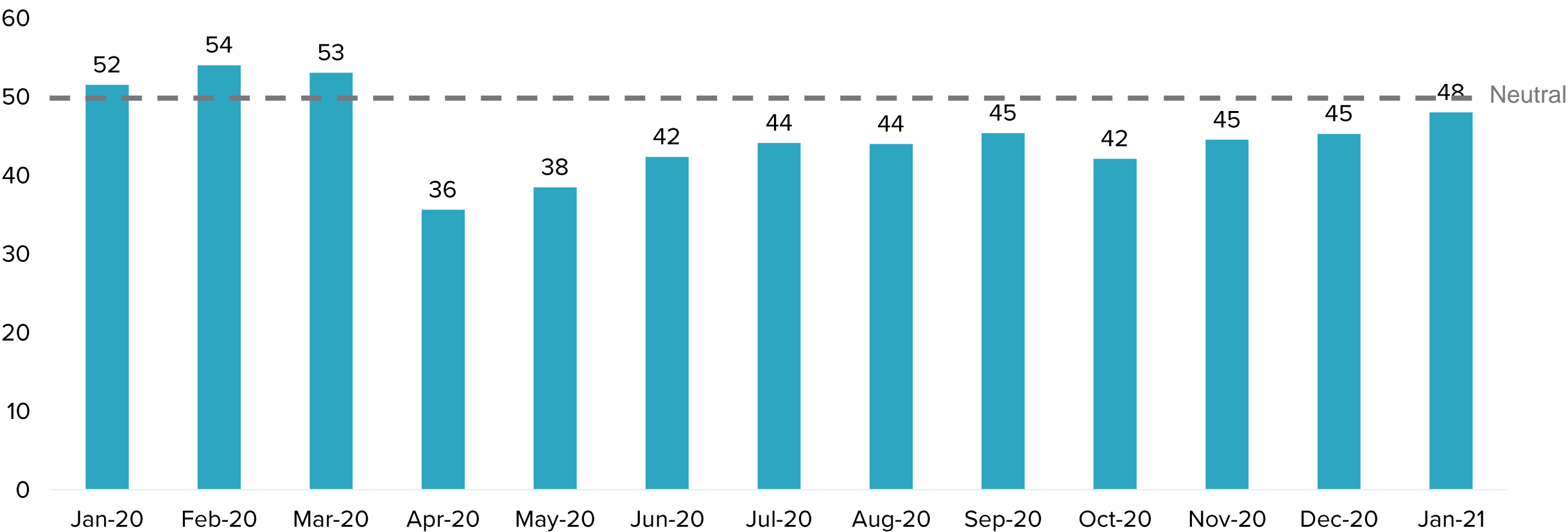
Source: Google Travel Trends.

Consumer Confidence (Economy/Financial) – Canada

Improving Consumer Confidence



Canada Consumer Confidence (Economic/Financial)



Source: Trading Economics.

Consumer Confidence – Travel Safety

Canada – I feel Safe to Travel

% Somewhat / Strongly Agree	BC/C.-B. (n=204)	AB/Alb. (n=213)	SK/MB Sask./Man. (n=201)	ON/Ont. (n=613)	QC/Qc (n=425)	ATL (n=203)
Communities near me	61% ▼	74%	59%	60%	53%	82%
Communities in my province	42% ▼	63%	49%	44%	43%	73%
Other provinces or territories in Canada	22%	43% ▼	29% ▼	26% ▼	27% ▼	19% ▼
The United States	9%	17%	12%	10%	12%	5%

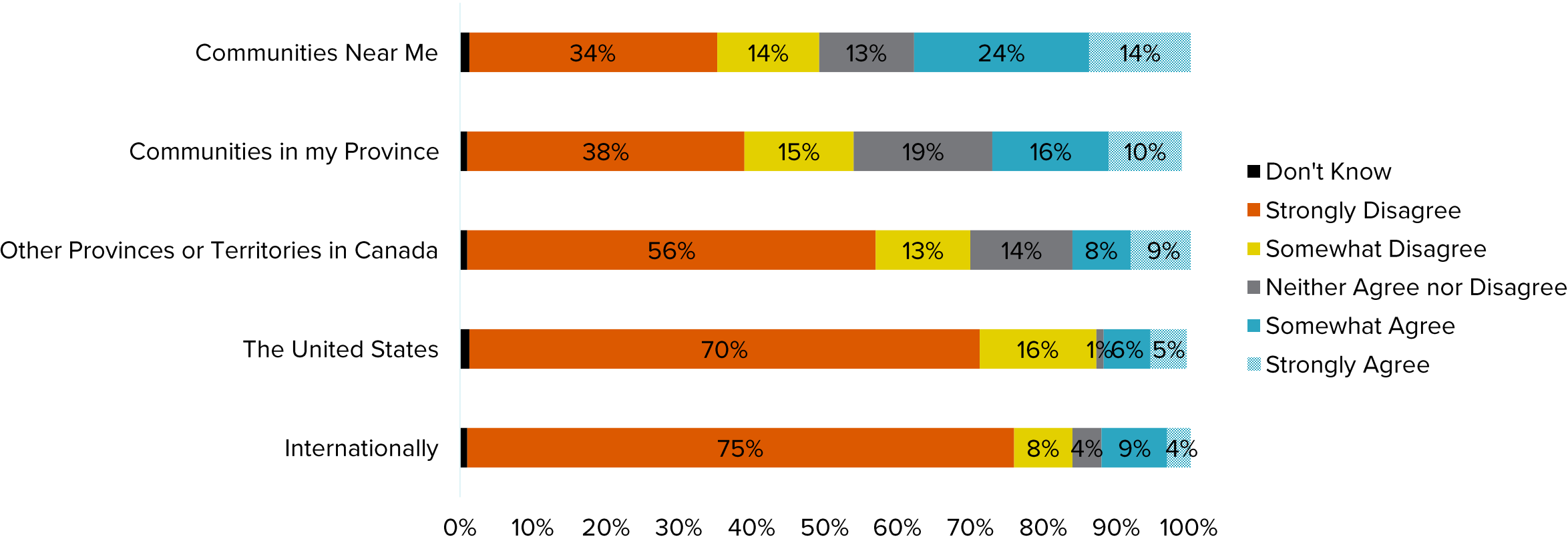
Source: Destination Canada Weekly COVID-19 Resident Sentiment, 2 Feb 2021.

Metro Vancouver Resident Sentiment

Level of Welcome Towards Visitors



Metro Vancouver Resident Sentiment – Level of Welcome Towards Visitors



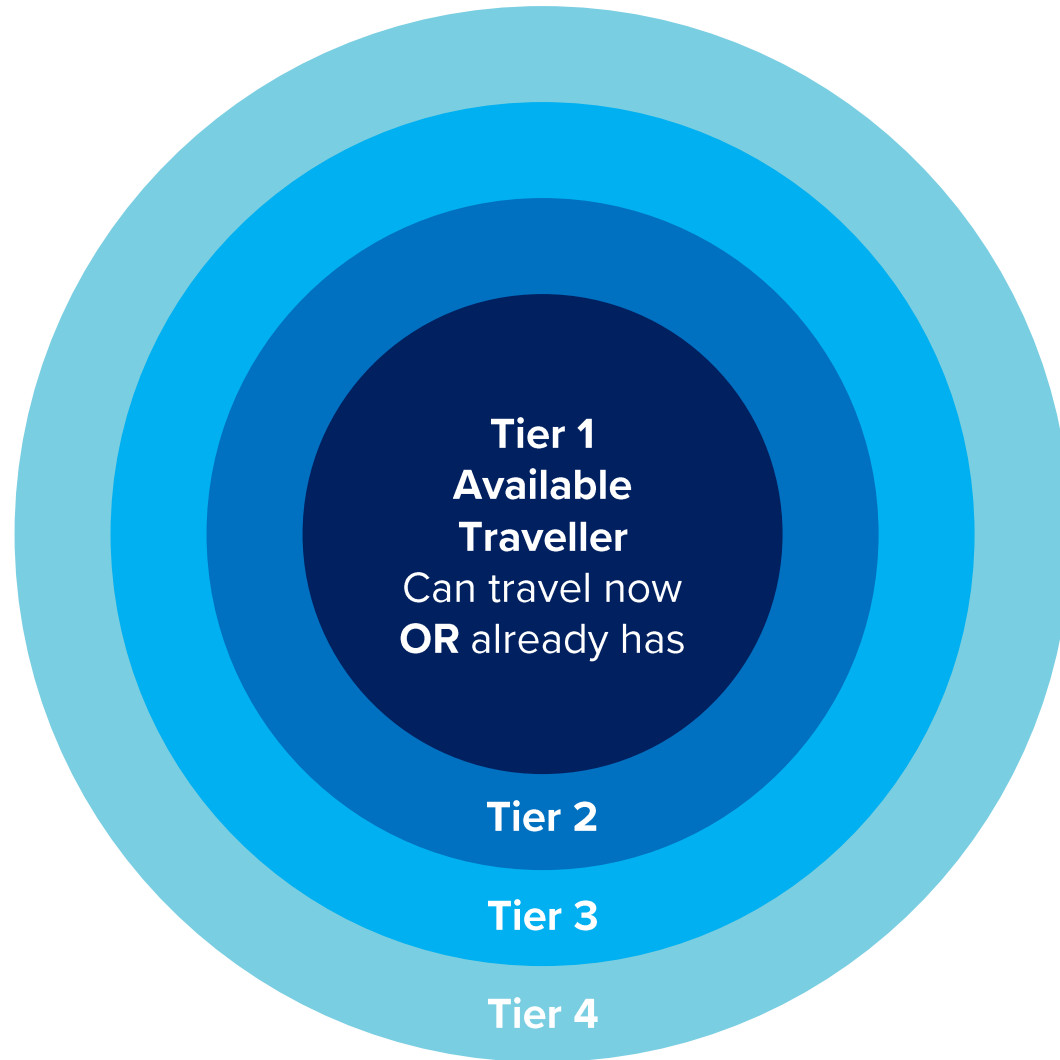
Note: Small sample size.
Source: Destination Canada Weekly COVID-19 Resident Sentiment, 2 Feb 2021.



Available Travellers

Available Travellers – Concept and Definition

Defining the Available Traveller



1

Travellers who can/will travel now OR have already travelled during the pandemic AND do not reject city travel.

2

Travellers who won't travel until it is no longer discouraged, cases have stabilized AND do not reject city travel.

3

Travellers who won't travel until rapid testing is available AND do not reject city travel.

4

Travellers who won't travel until a vaccine, cure or effective treatment is ready AND do not reject city travel.

Available Traveller – Geographic Segmentation



metrovancouver

Available Travellers are defined as those who are willing to travel to **other nearby communities**.



Available Travellers are defined as those who are willing to travel to **other communities nearby OR other parts of their province**.



Available Travellers are defined as those who are willing to travel to **other parts of Canada**.

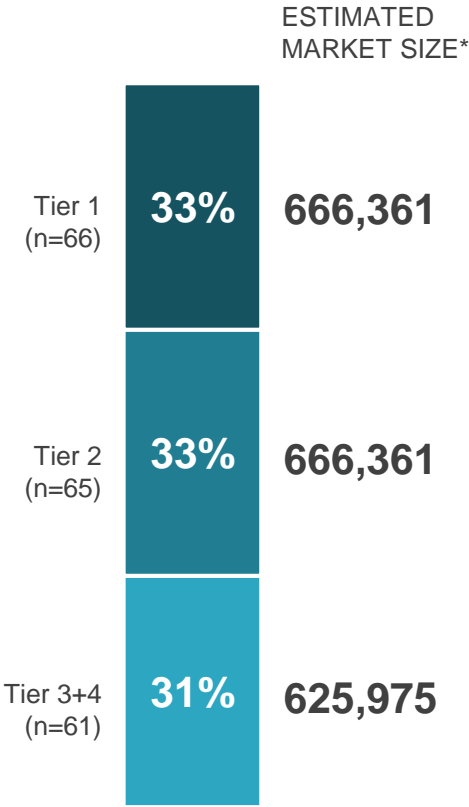
Available Travellers – Incidence and Market Potential

Sizing up the Market Opportunity

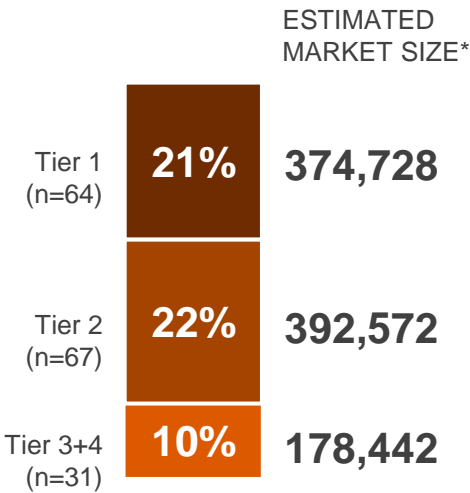
- 1 Travellers who can/will travel now OR have already travelled.
- 2 Travellers who won't travel until it is no longer discouraged, cases have stabilized.
- 3 Travellers who won't travel until rapid testing is available OR vaccination/treatment.
- 4

VAN
COU
VER

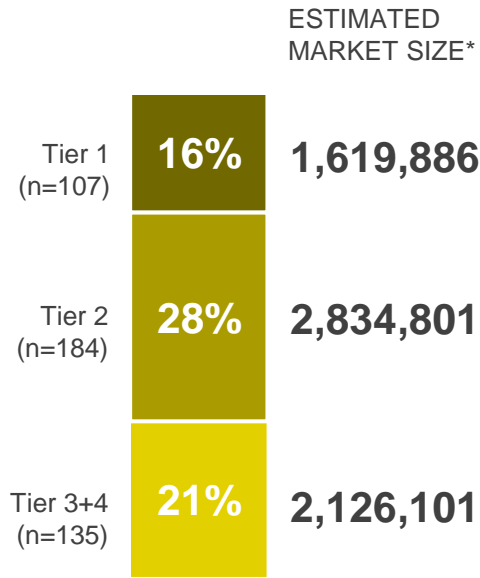
METRO VANCOUVER RESIDENTS



OTHER BRITISH COLUMBIANS (EXCLUDING VANCOUVER)



OTHER CANADIAN MARKETS (CALGARY, EDMONTON, TORONTO, MONTREAL)

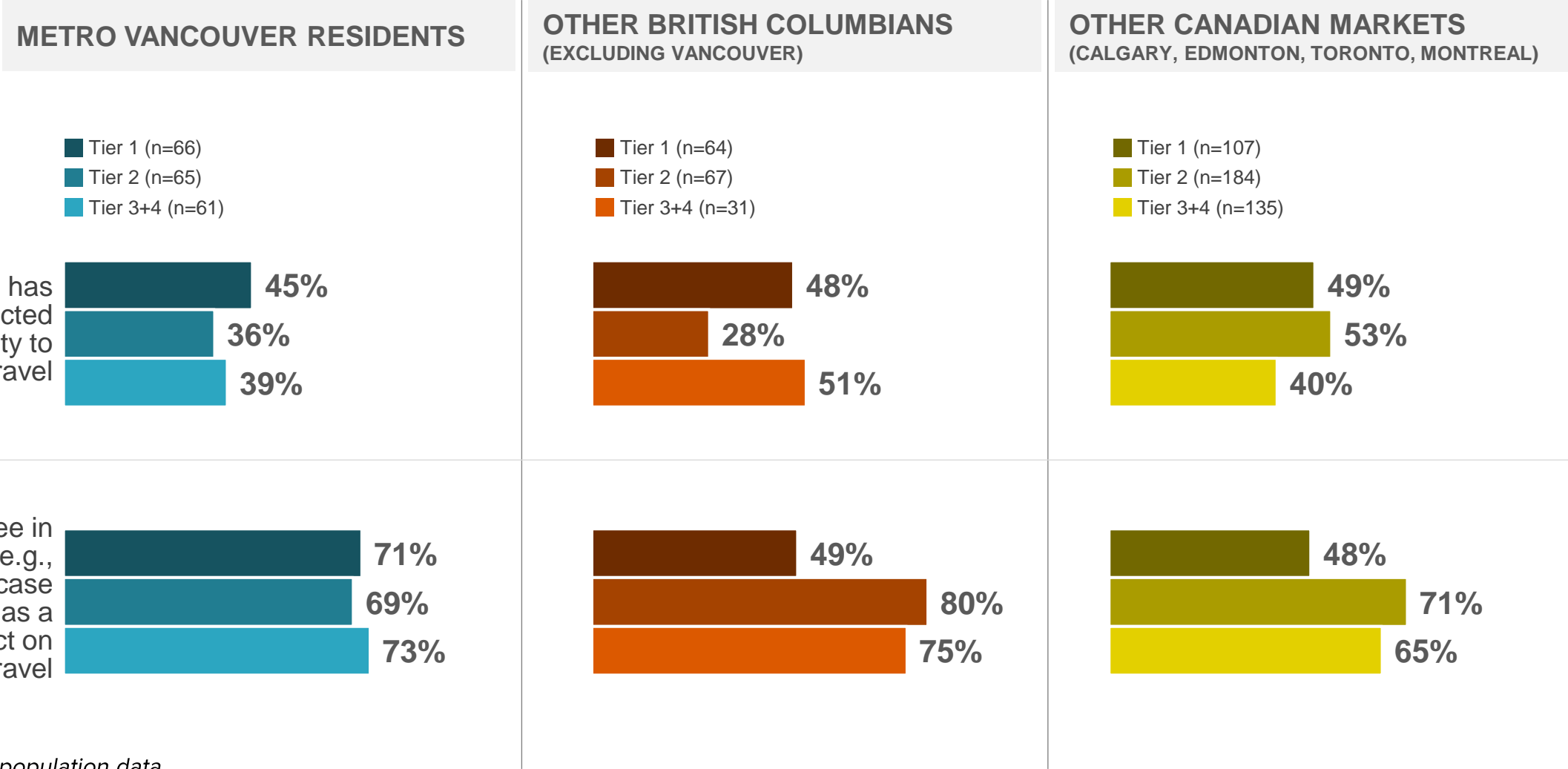


* Based on 2016 census population data.

Financial & Media Impact on Travel

Media Impact is Significant

- 1 Travellers who can/will travel now OR have already travelled.
- 2 Travellers who won't travel until it is no longer discouraged, cases have stabilized.
- 3 Travellers who won't travel until rapid testing is available OR vaccination/treatment.
- 4



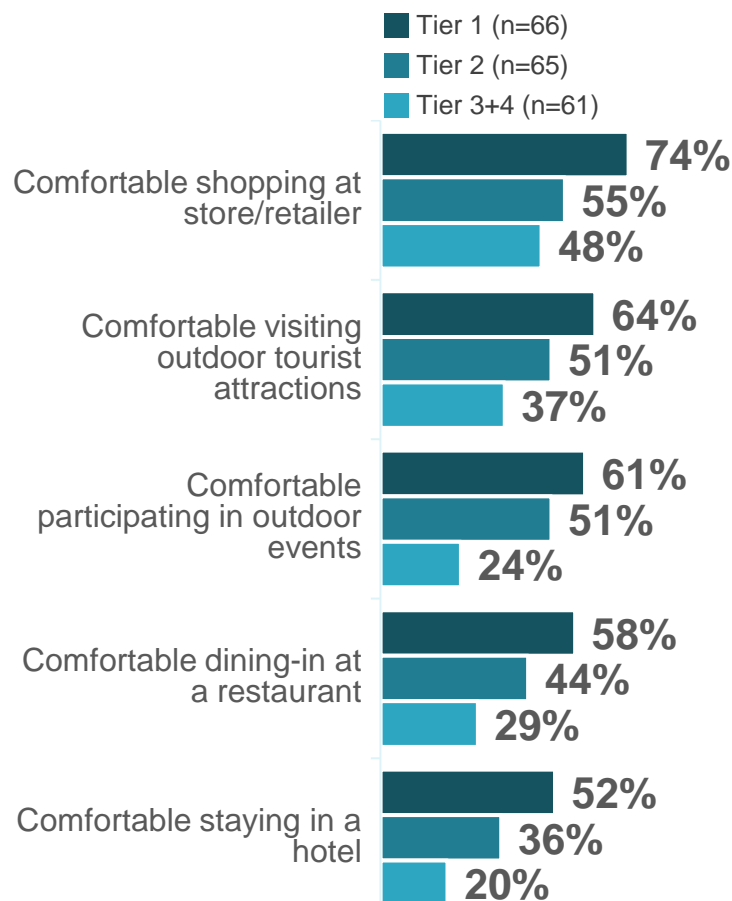
* Based on 2016 census population data.

Available Travellers – Top 5 Activities of Comfort

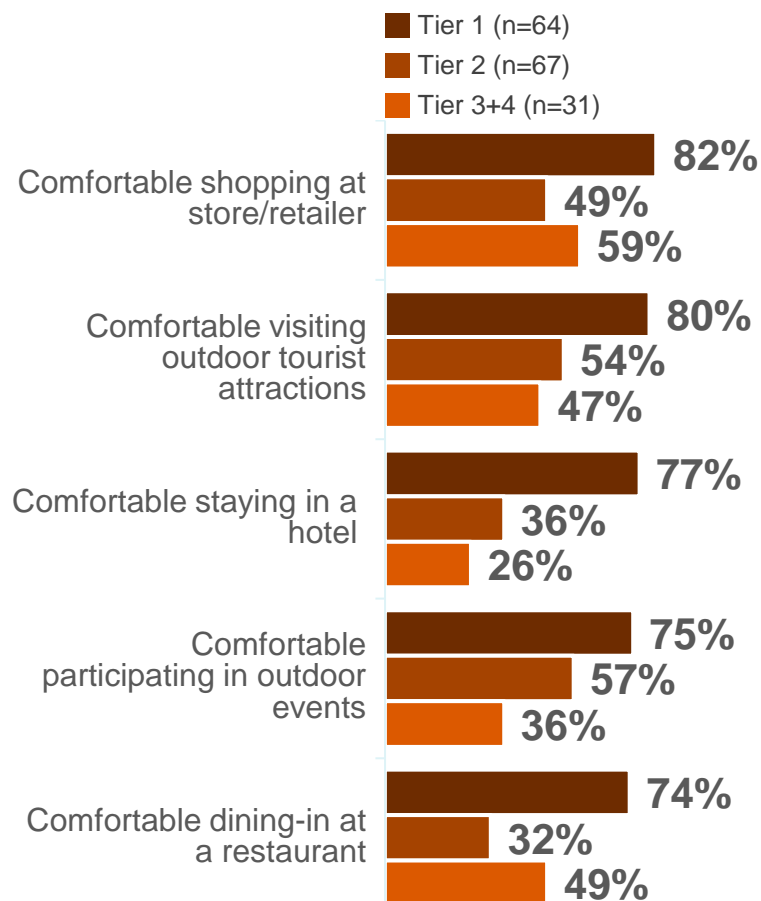
- 1 Travellers who can/will travel now OR have already travelled.
- 2 Travellers who won't travel until it is no longer discouraged, cases have stabilized.
- 3 Travellers who won't travel until rapid testing is available OR vaccination/treatment.
- 4

VAN
COU
VER

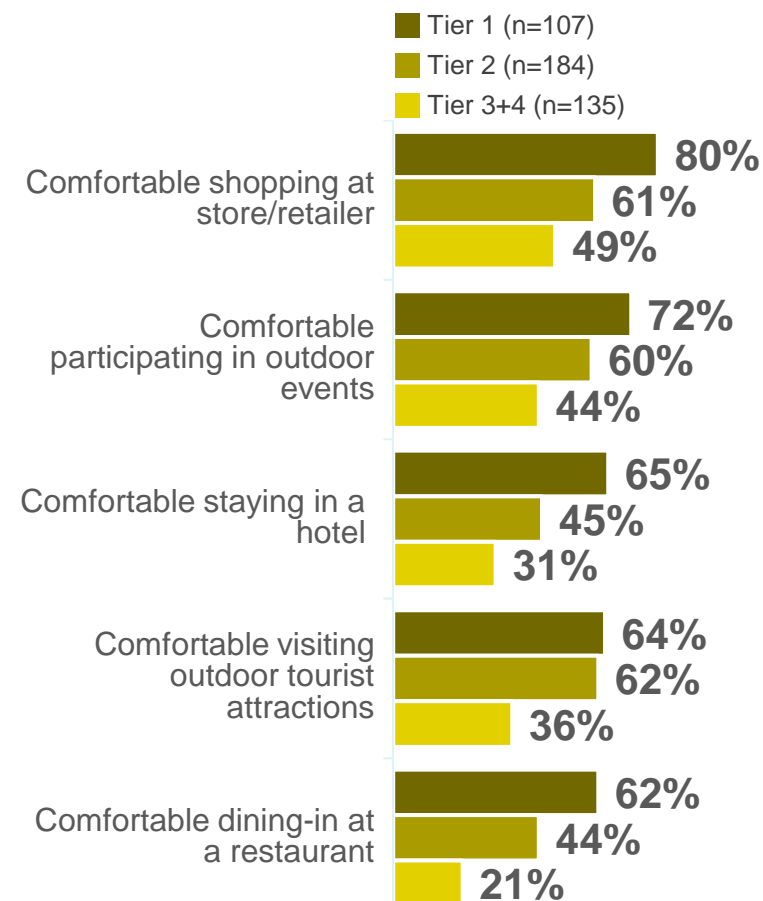
METRO VANCOUVER RESIDENTS



OTHER BRITISH COLUMBIANS (EXCLUDING VANCOUVER)



OTHER CANADIAN MARKETS (CALGARY, EDMONTON, TORONTO, MONTREAL)

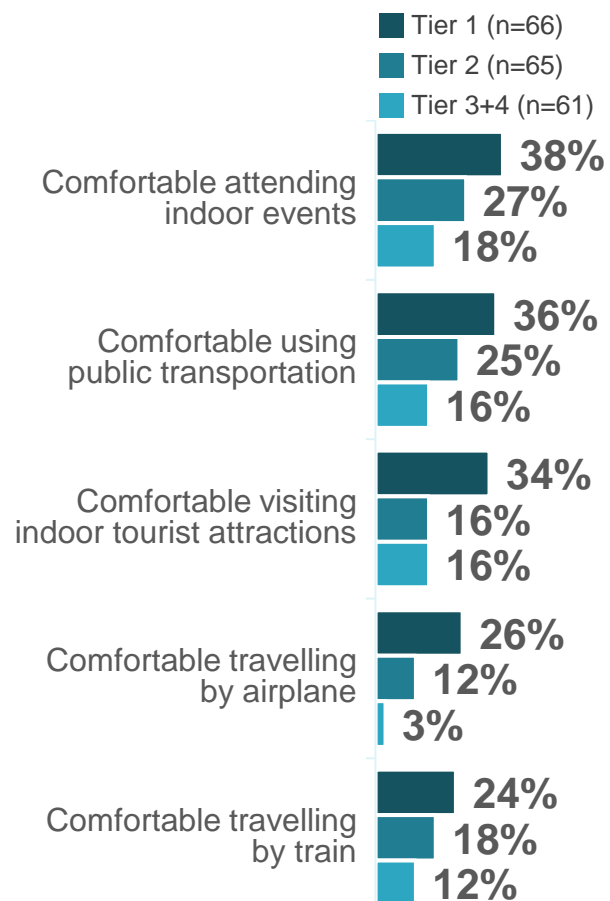


Available Travellers – Comfort with Other Activities

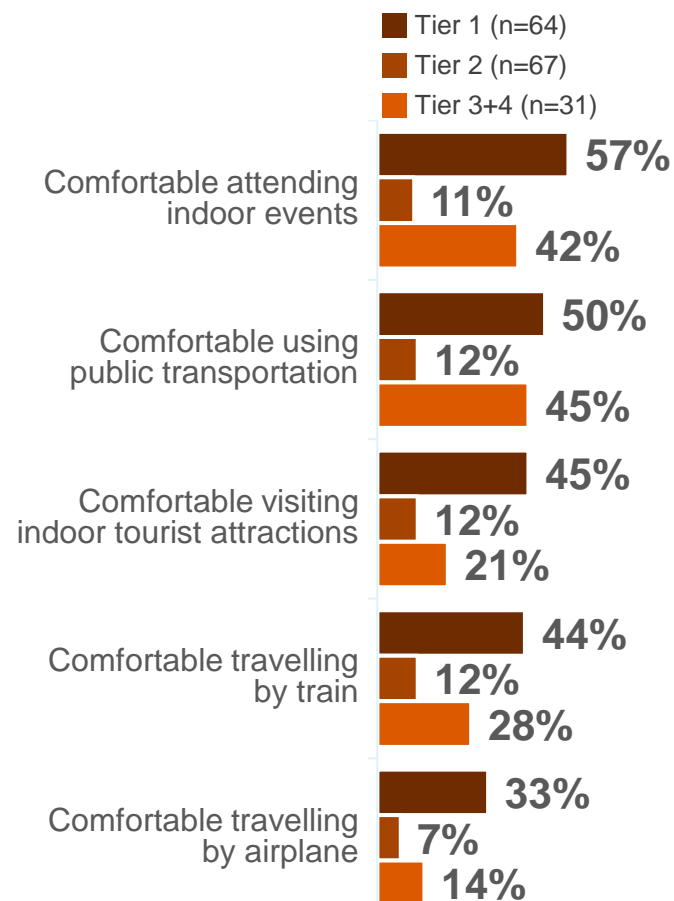
- 1 Travellers who can/will travel now OR have already travelled.
- 2 Travellers who won't travel until it is no longer discouraged, cases have stabilized.
- 3 Travellers who won't travel until rapid testing is available OR vaccination/treatment.
- 4

VAN
COU
VER

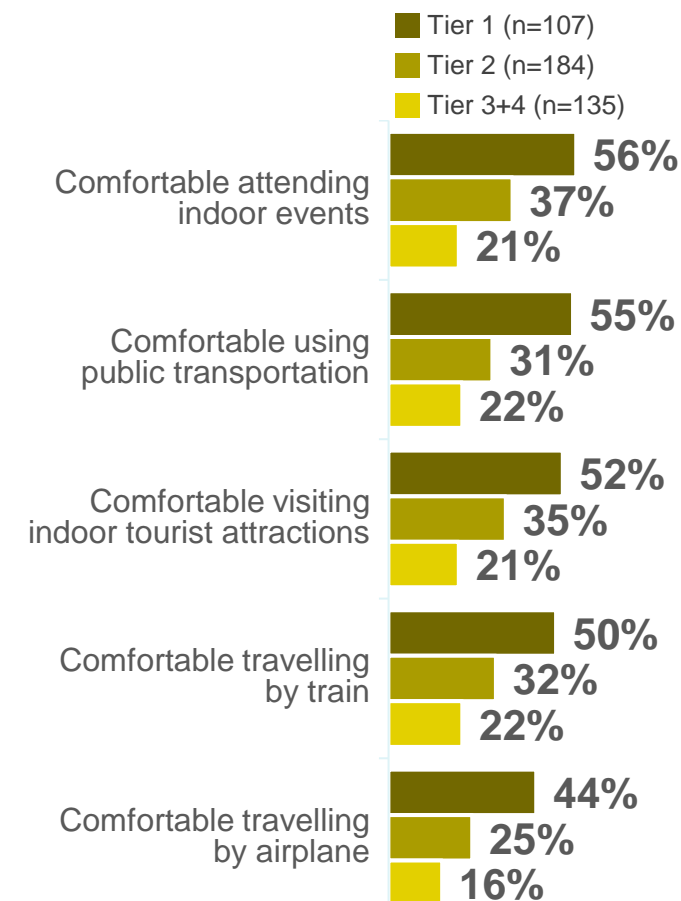
METRO VANCOUVER RESIDENTS



OTHER BRITISH COLUMBIANS (EXCLUDING VANCOUVER)



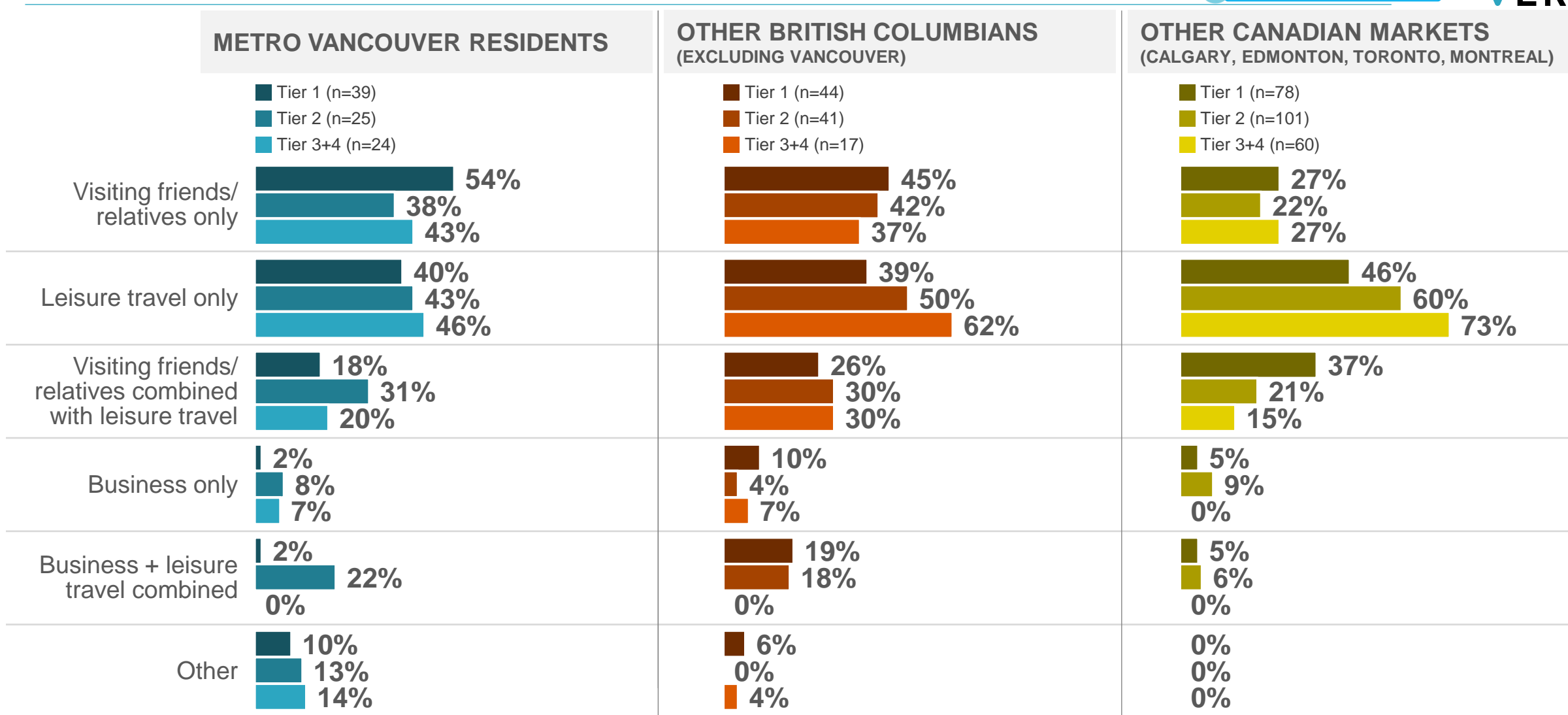
OTHER CANADIAN MARKETS (CALGARY, EDMONTON, TORONTO, MONTREAL)



Available Travellers – Trip Purpose/Motivation

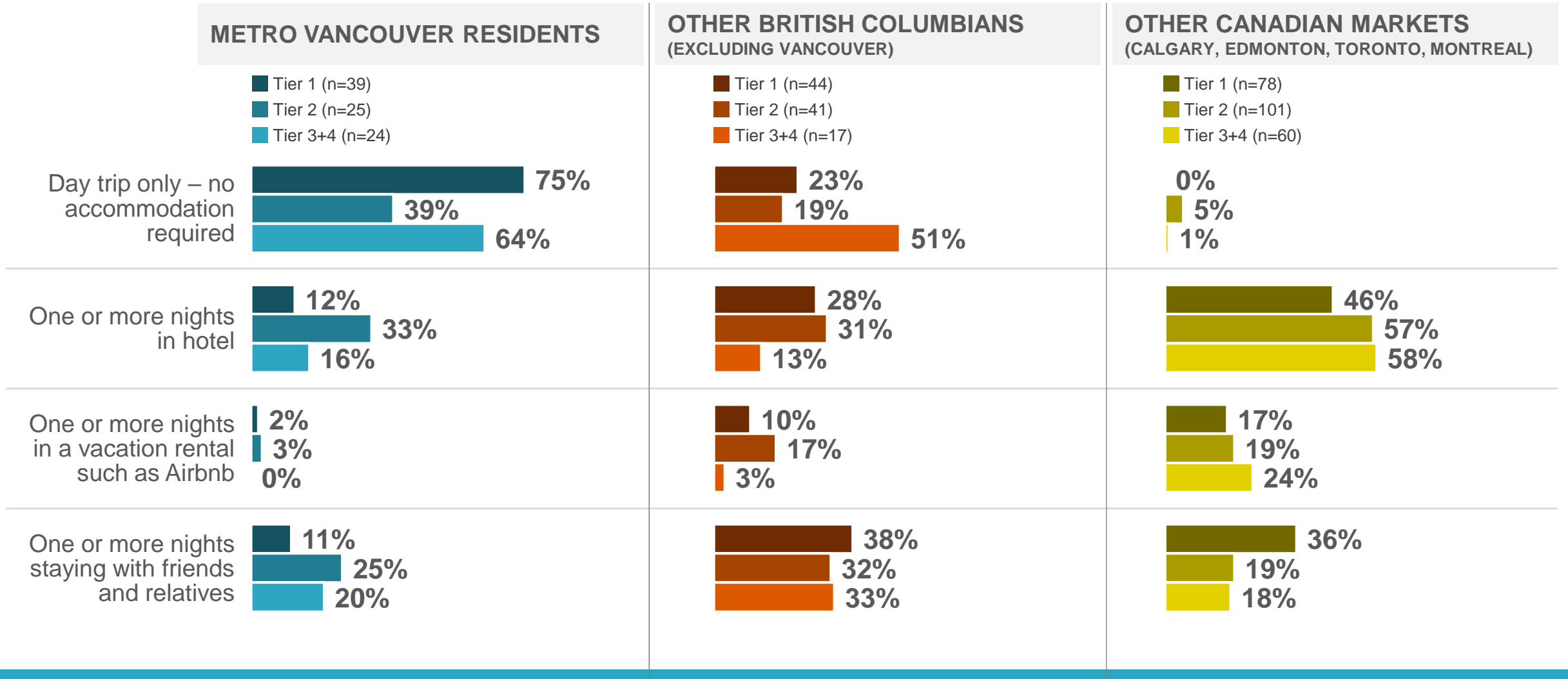
- 1 Travellers who can/will travel now OR have already travelled.
- 2 Travellers who won't travel until it is no longer discouraged, cases have stabilized.
- 3 Travellers who won't travel until rapid testing is available OR vaccination/treatment.
- 4

VAN
COU
VER



Available Travellers – Accommodation Preference

- 1 Travellers who can/will travel now OR have already travelled.
- 2 Travellers who won't travel until it is no longer discouraged, cases have stabilized.
- 3 Travellers who won't travel until rapid testing is available OR vaccination/treatment.
- 4

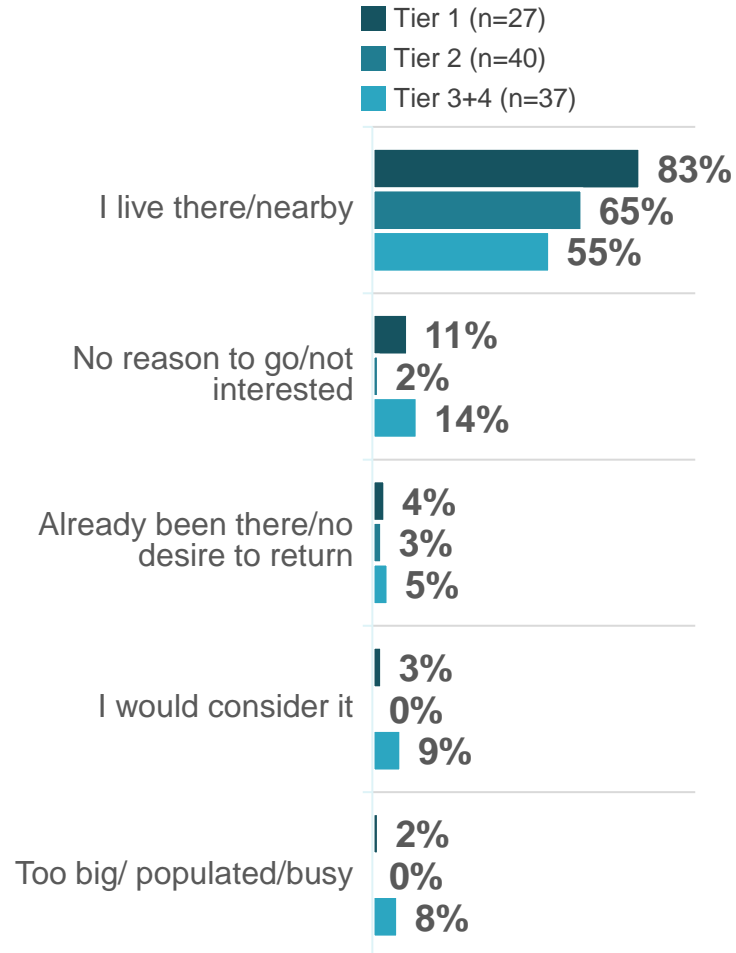


Available Travellers – Barriers

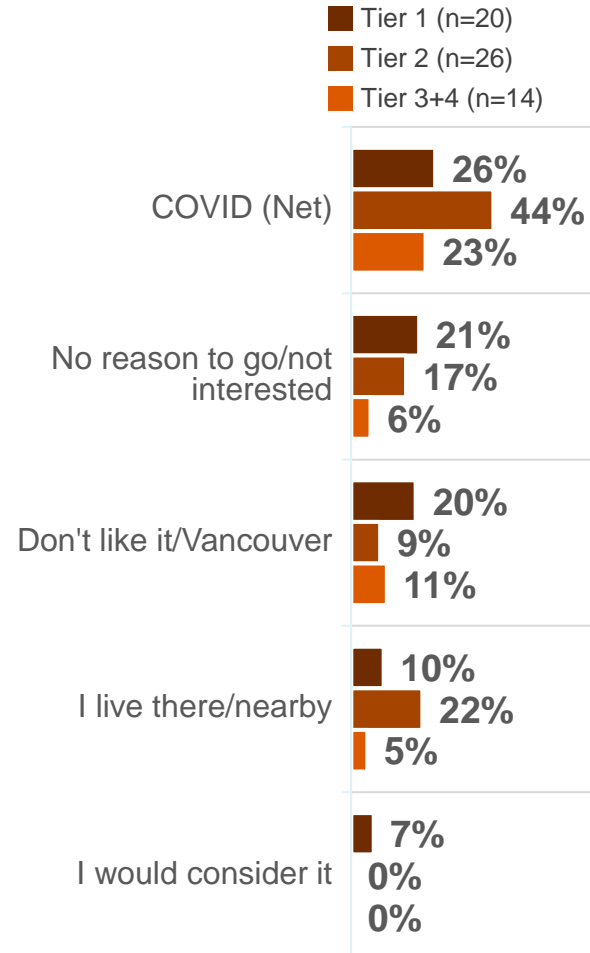
- 1 Travellers who can/will travel now OR have already travelled.
- 2 Travellers who won't travel until it is no longer discouraged, cases have stabilized.
- 3 Travellers who won't travel until rapid testing is available OR vaccination/treatment.
- 4

VAN
COU
VER

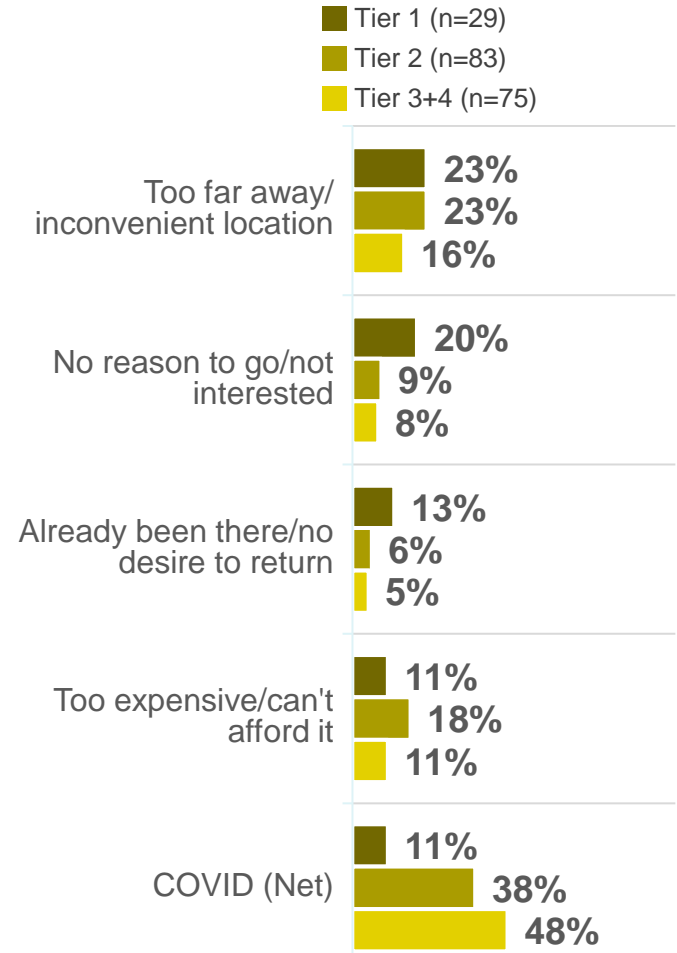
METRO VANCOUVER RESIDENTS



OTHER BRITISH COLUMBIANS (EXCLUDING VANCOUVER)



OTHER CANADIAN MARKETS (CALGARY, EDMONTON, TORONTO, MONTREAL)



Available Traveller Demographics*

Metro Vancouver Residents

- 1 Travellers who can/will travel now OR have already travelled.
- 2 Travellers who won't travel until it is no longer discouraged, cases have stabilized.
- 3 Travellers who won't travel until rapid testing is available OR vaccination/treatment.
- 4

VAN
COU
VER



AGE

	Tier 1	Tier 2	Tier 3+4
18 – 24	5%	9%	8%
24 – 34	23%	19%	15%
35 – 44	28%	30%	25%
45 – 54	11%	14%	25%
55+	32%	27%	28%



INCOME

	Tier 1	Tier 2	Tier 3+4
<\$25K	16%	6%	15%
\$25 – \$55K	21%	17%	23%
\$55 – \$100K	28%	45%	29%
\$100 – \$150K	24%	20%	20%
\$150K+	8%	8%	6%



ETHNIC BACKGROUND

	Tier 1	Tier 2	Tier 3+4
North American	42%	33%	20%
British Isles	35%	32%	21%
European	32%	31%	18%
Latin, Central, South American	3%	3%	6%
African	1%	-	-
Asian Origins (NET)	16%	17%	41%
Chinese	12%	10%	20%
East Indian	2%	-	4%



KIDS

	Tier 1	Tier 2	Tier 3+4
Has kids	26%	33%	26%
No kids	74%	67%	74%

Note: Small sample size.

Base: Tier 1 (n=66), Tier 2 (n=65), Tier 3+4 (n=61)

Available Traveller Demographics*

Other BC Residents (excluding Vancouver)

- 1 Travellers who can/will travel now OR have already travelled.
- 2 Travellers who won't travel until it is no longer discouraged, cases have stabilized.
- 3 Travellers who won't travel until rapid testing is available OR vaccination/treatment.
- 4

VAN
COU
VER



AGE

	Tier 1	Tier 2	Tier 3+4
18 – 24	5%	13%	38%
24 – 34	25%	17%	18%
35 – 44	13%	17%	12%
45 – 54	23%	14%	10%
55+	35%	40%	22%



INCOME

	Tier 1	Tier 2	Tier 3+4
<\$25K	12%	20%	28%
\$25 – \$55K	25%	34%	7%
\$55 – \$100K	32%	25%	39%
\$100 – \$150K	13%	5%	13%
\$150K+	2%	4%	2%



ETHNIC BACKGROUND

	Tier 1	Tier 2	Tier 3+4
North American	38%	37%	39%
British Isles	38%	33%	11%
European	20%	15%	6%
Latin, Central, South American	1%	-	2%
African	-	-	-
Asian Origins (NET)	2%	11%	26%
Chinese	1%	5%	12%
East Indian	-	4%	5%



KIDS

	Tier 1	Tier 2	Tier 3+4
Has kids	7%	26%	44%
No kids	93%	74%	56%

Note: Small sample size.

Base: Tier 1 (n=64), Tier 2 (n=67), Tier 3+4 (n=31)

Available Traveller Demographics*

Other Canadian Markets (Calgary, Edmonton, Montreal, Toronto)

- 1 Travellers who can/will travel now OR have already travelled.
- 2 Travellers who won't travel until it is no longer discouraged, cases have stabilized.
- 3 Travellers who won't travel until rapid testing is available OR vaccination/treatment.
- 4

VAN
COU
VER



AGE

	Tier 1	Tier 2	Tier 3+4
18 – 24	13%	15%	17%
24 – 34	22%	27%	17%
35 – 44	24%	25%	20%
45 – 54	13%	16%	17%
55+	27%	17%	29%



INCOME

	Tier 1	Tier 2	Tier 3+4
<\$25K	13%	10%	18%
\$25 – \$55K	24%	39%	22%
\$55 – \$100K	27%	27%	35%
\$100 – \$150K	18%	12%	15%
\$150K+	10%	8%	4%



ETHNIC BACKGROUND

	Tier 1	Tier 2	Tier 3+4
North American	35%	32%	36%
British Isles	20%	18%	13%
European	35%	27%	25%
Latin, Central, South American	1%	2%	1%
African	2%	4%	8%
Asian Origins (NET)	13%	29%	27%
Chinese	7%	8%	15%
East Indian	2%	3%	5%



KIDS

	Tier 1	Tier 2	Tier 3+4
Has kids	29%	31%	31%
No kids	71%	69%	69%



CITY

	Tier 1	Tier 2	Tier 3+4
Calgary	30%	15%	17%
Edmonton	16%	15%	13%
Toronto	23%	42%	44%
Montreal	31%	28%	25%

Note: Small sample size.

Base: Tier 1 (n=107), Tier 2 (n=184), Tier 3+4 (n=135)

Summary

- Insights Driven: Monitoring a range of key market signals and indicators to inform our re-start and destination promotion activities.
- Partnership approach to leveraging and generating business intelligence.
- YTD (Jan 2021) business is currently low; but
- Evidence of pent-up demand.
- Available Travellers will lead the restart.

How to Use Today's Information

- 1) Use this as a common baseline of the industry as of today;
- 2) Use this information to help focus your efforts and investment; and
- 3) Ensure your programs/operations are helping to rebuild consumer confidence.



Q&A

Eugene Chu

Manager, Research & Business Analytics

E-mail: echu@tourismvancouver.com