



FINAL REPORT

COVID-19 Tourism Impact Report

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This project was made possible through funds provided by Western Economic Diversification Canada/Pacific Economic Development Canada, and the British Columbia Ministry of Tourism, Arts, Culture, and Sport. Program funds were provided from April 2020 to January 2022.

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Attribution—Please cite the work as follows: Inference Economics.
2022. BC Regional Tourism Secretariat Final COVID-19 Impact
Report. Vancouver, BC.
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Table of contents

iv	Foreword
1	Executive Summary
1	Findings
6	Recommendations
7	1. Understanding the impact of COVID-19 on the visitor economy
10	1.1 Survey design and methodology
11	1.2 Impact and use of survey data
11	1.3 Summary of survey data
13	2. The broad but uneven impact of COVID-19 on BC's visitor economy
14	2.1 Changes in business conditions over the pandemic
16	2.2 Periodic issues over the pandemic
16	<i>Financial hardship, debt, and loss of revenue</i>
18	<i>Layoffs and staffing challenges</i>
21	<i>Issues preventing firms from reopening</i>
23	<i>The challenge of health and safety protocols</i>
25	2.3 Supporting firms throughout the pandemic
28	2.4 Further challenges to the visitor economy
30	2.5 Regional differences during the pandemic
32	3. The visitor economy moving forward
33	3.1 State of the visitor economy moving forward
35	3.2 Recommendations for future crises
36	<i>Industry specific recommendations</i>
37	<i>Recommendations to government and other policymakers</i>

Foreword

The British Columbia Regional Tourism Secretariat (BCRTS) is an active collaboration between the five tourism regions of Cariboo Chilcotin Coast Tourism Association, Kootenay Rockies Tourism Association, Northern BC Tourism Association, Thompson Okanagan Tourism Association, and 4VI (formerly Tourism Vancouver Island). From March 2020 to December 2021, BCRTS leveraged its collective business network in order to better understand the impact of the COVID-19 pandemic on tourism businesses and the greater visitor economy. BCRTS members collected data through a series of online surveys. These surveys were initially conducted on a weekly basis, before switching to monthly and subsequently bi-monthly survey periods as the pandemic stabilized.

Through a collaborative process, BCRTS members and other partner stakeholders designed a set of questions that was then used to collect data from members of the visitor economy. The survey questions were made up of a mix of core questions that repeated across surveys, as well as one-off or temporary questions that were designed to inform on context-specific events or policies. Regularly released reports containing data visualizations and analysis on a provincial and regional level were generated using data collected from the survey program.

The survey program was the product of a successful collaboration between members of the BCRTS as well as several external partner organizations. Organizations, including the British Columbia Hotel Association, the Tourism Industry Association of British Columbia, and the BC Destination Marketing Organization Association, provided valuable contributions to the survey program through their input during the question design process and the promotion of the survey to each organizations respective members.

This program would not have been possible without the hard work of many people across the province, whose diligence and teamwork ensured that the visitor economy was supported during a period of unprecedented difficulty for the sector.

The following report is a summary of the impact of the COVID-19 pandemic on the visitor economy in British Columbia from April 2020 to December 2021. Over the course of the period, several key themes and common experiences became apparent through BCRTS's survey program. International travel restrictions, differences in proximity to major population centres, and differences in business type all led to an uneven impact of the pandemic across the visitor economy. This report is intended to share the experiences of the visitor economy as BCRTS stakeholders persevered through one of the most challenging periods in the province's history. The experience of the visitor economy during this challenging time contains many lessons for partners and stakeholders on navigating future events, impacts, and crises.

Executive Summary

The BCRTS survey program provided a regular and reliable source of information regarding the issues affecting members of the visitor economy over the course of the COVID-19 pandemic. The survey program allowed the BCRTS to better understand the impact of the pandemic throughout the visitor economy, and filled a void of information during the early days of the pandemic. Over a 21-month period, BCRTS collected 7,952 responses and heard from 3,849 different members of the visitor economy. The information collected through the survey program informed BCRTS in its advocacy and support of the visitor economy over the course of the pandemic.

Findings

As the visitor economy adapted to a “new normal,” it still remained depressed relative to pre-pandemic levels. Travel restrictions, health and safety protocols, and a lack of visitor confidence prevented firms from fully reopening. At no point over the course of the survey program did the average change in revenue relative to the same month pre-pandemic perform better than a loss of 17%. Further, the proportion of firms that are unable to pay all of their monthly bills has remained at approximately 30% for the final four surveys that covered the later half of 2021.

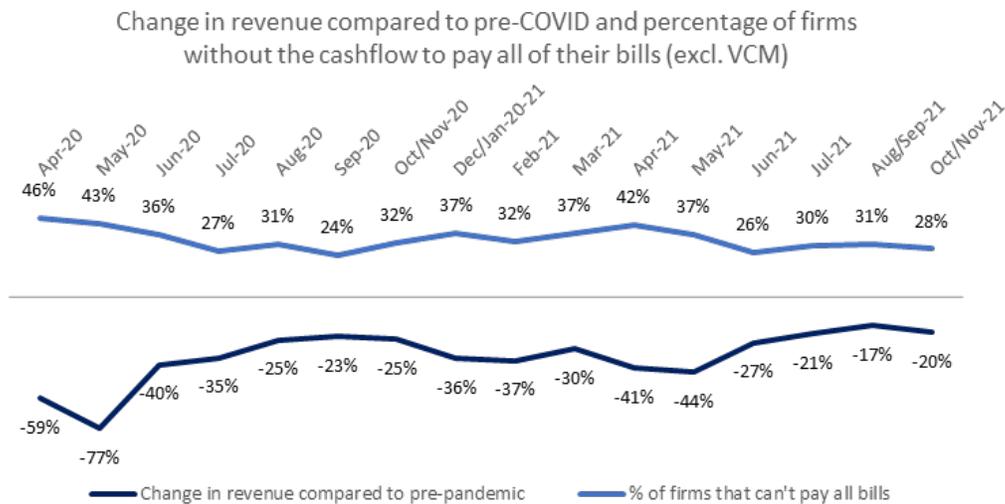


Figure 4: Change in revenue relative to 2019 and percentage of firms that cannot pay 100% of their bills, November/December 2021.

In general, periods of high COVID cases and stricter government regulations led to subsequent declines in revenue and a higher proportion of firms being closed. The proportion of firms that were operating with reduced operations was mostly uncorrelated with case counts or government restrictions for the majority of the pandemic. There has been a degree of recovery across the change in revenue and ability to pay bills since the beginning of the pandemic, but it appears the recovery in the visitor economy has largely stalled, and that the industry has not returned to its pre-pandemic strengths.

Many businesses in the visitor economy were forced to take on a substantial amount of debt in order to survive the pandemic. The onset of the pandemic occurred at a critical time for many seasonal and year-round businesses that are centred around the summer. The latter half of spring and summer are crucial to generating the revenue needed to pay bills throughout the year for many firms. Low visitor volumes meant that many firms did not generate sufficient revenue to cover their bills, and were forced to rely on alternative methods of financing their operations.

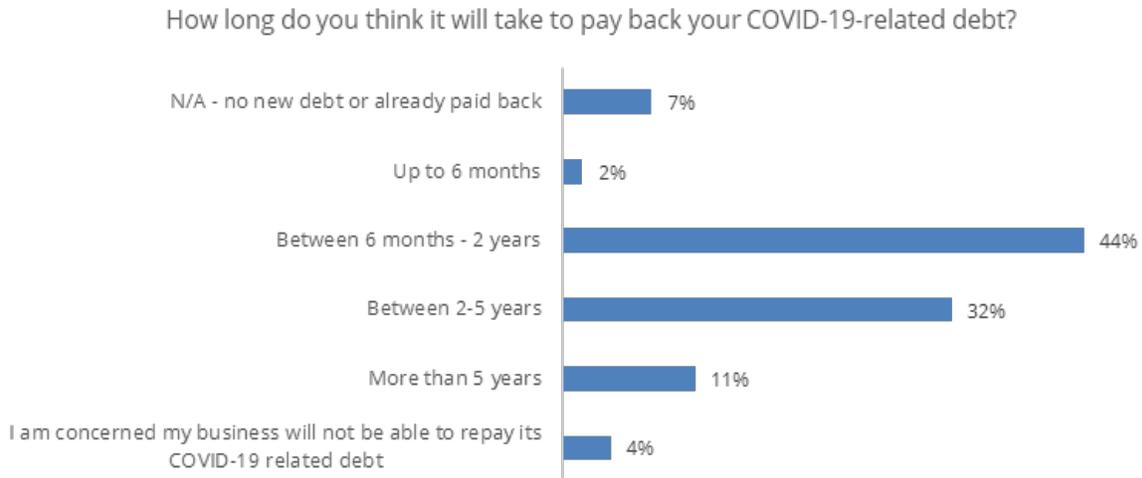


Figure 7: Paying back COVID-19 related debt, April 2021

In March 2021, a year into the pandemic, only 28% of surveyed firms were able to pay their bills through current revenue.

The financial impact of the pandemic on the visitor economy is likely to remain after the pandemic has run its course. As of April 2021, 43% of surveyed firms believed that it would take two years or longer to pay back all COVID-19 related debt.

Both workers and businesses bore the brunt of the pandemic. The initial shock of the pandemic led to layoffs across many sectors nationwide. Restrictions on travel and gathering meant that workers in the visitor economy were particularly vulnerable to lay offs, and even as the economy began to reopen the share of workers being hired was generally less than the share of workers who were laid off. For firms that were particularly reliant on international visitors, such as hotels and resorts, the share of workers that were rehired was far less than other firm types that were able to rely on local and provincial visitors, such as food and beverage firms.

Beyond layoffs, many businesses across the province reduced the number of full-time positions available through their business. Nearly 38% of businesses surveyed in January and February 2021 said that they reduced the number of full time positions by more than 50% due to COVID-19.

Staffing shortages were an unforeseen impact of the pandemic and led to a dual shock in the supply and demand for tourism services. Low demand for tourism services, mainly driven by a lack of international visitors and low levels of visitor confidence, meant that many firms were not in the financial position to hire employees. Labour shortages, labour intensive adherence to health and safety protocols, as well as capacity and mass gathering restrictions, limited firms in their ability to supply a full range of tourism services relative to pre-pandemic. Despite the pricing recovery that many Canadians experienced while traveling during periods of high demand in 2020 and 2021, firms were unable to increase their offerings to meet demand.

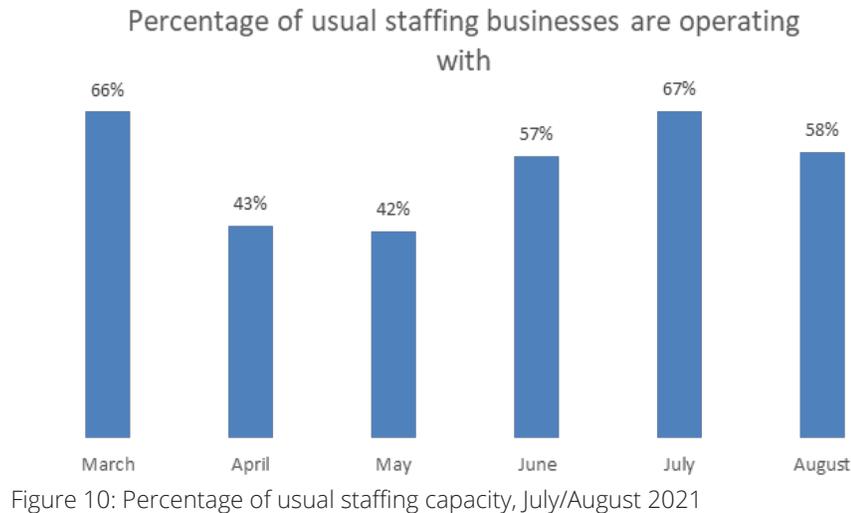


Figure 10: Percentage of usual staffing capacity, July/August 2021

Other factors, such as low availability of workers in the surrounding area, contributed to staffing shortages for many firms. For firms that were reliant on international visitors and were operating in regions with smaller labour markets, it is likely that the factors that drove the dual shock to supply and demand were especially pronounced.

Travel restrictions, lack of visitor confidence, and limits on capacity prevented firms from fully reopening. The proportion of firms that are operating with reduced operations remained largely unchanged for the majority of the pandemic. These firms consistently identified restrictions on travel, a lack of visitor confidence, and limits on capacity as being the primary barriers to fully reopening. The main barrier to fully reopening largely varied by business type — for accommodation firms, international travel restrictions were seen as the main barrier to fully reopening, while food and beverage businesses were more likely to identify capacity restrictions as the main barrier to fully reopening.

Health and safety protocols and community attitudes towards tourism were seen as particularly challenging for members of the visitor economy. Many firms felt unequipped to enforce provincial health and safety protocols, and often thought that these protocols limited their ability to deliver their product or services. During the summer of 2020, strict adherence to health and safety protocols on a community level likely led to a high degree of discomfort with the idea of traveling around BC, as well as welcoming in visitors from other regions into the community. Firms felt that members of their communities would be more welcoming to visitors from nearby areas, and would be most uncomfortable welcoming visitors from outside the

province. Additionally, many firms felt that requiring guests to be vaccinated during the summer of 2021 would do little to increase the community acceptance of tourism.

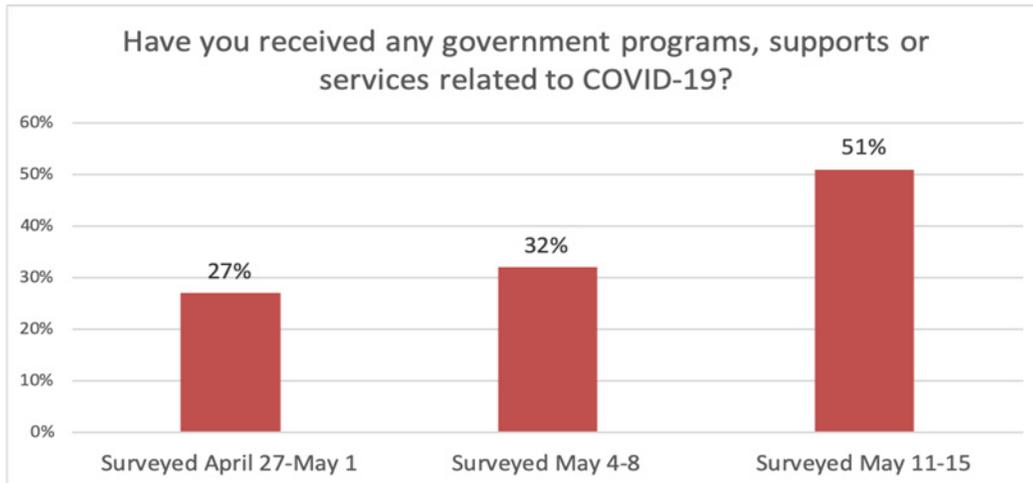


Figure 18: Have you received government assistance, May 11th & May 15th 2020

By and large, government supports were well utilized when firms were aware of them. Take up of government program increased by 24 percentage points (from 27% to 51%) from the end of April 2020 to mid-May 2020. The most popular programs included the provincial Small and Medium-Sized Business Recovery Grant (SMSBRG), the federal Canadian Emergency Wage Subsidy (CEWS) and the Canadian Emergency Business Account (CEBA) programs. Roughly 36% of surveyed firms in July/August 2021 had receiving funding through SMSBRG, roughly nine months after its launch in December 2020. Amendments to program eligibility allowed for as many businesses as possible to access government supports.

The impact of the COVID-19 pandemic was deeply uneven throughout the visitor economy. The experience of firms varied greatly by region, and within regions there was a large degree of variation in how firms were affected by the pandemic. Firms that were reliant on international visitors were consistently in a worse financial position throughout the pandemic.

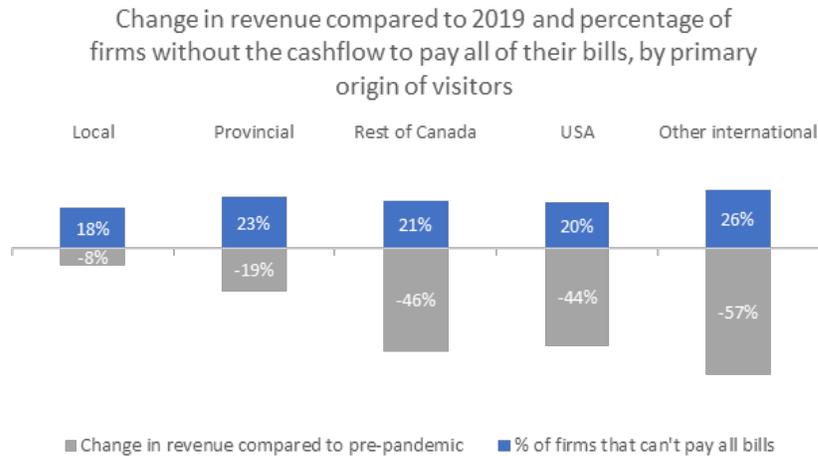


Figure 28: Change in revenue relative to 2019 and % of firms that cannot pay all bills by primary visitor origin, July/August 2021

For firms surveyed in July/August 2021, it became clear that for many remote firms that were reliant on international visitors, the inability to access domestic visitors meant that they were more likely to have difficulty paying their bills and were more likely to suffer greater losses in revenue relative to pre-pandemic. For regions such as Vancouver Island and Thompson Okanagan, greater proximity to large population centres meant that the regions as a whole fared better throughout the pandemic. For Cariboo Chilcotin Coast and Northern BC, a higher proportion of remote destination firms that were reliant on international visitors meant that the regions fared worse overall.

As of December 2021, the strength of the visitor economy remained weak in BC. Bookings had not recovered to pre-pandemic levels, and many firms have had to downsize their operations in order to deal with the reduction in demand for tourism services. It will take a significant proportion of tourism firms several years to pay back COVID-19 related debt, all while having to contend with a tight labour market and rising inflation in the immediate future. For many firms, late spring and the beginning of summer are going to be crucial in determining the viability of their business within the visitor economy.

As of writing, there have been some encouraging signs for the visitor economy since the conclusion of the survey program. Accommodation firm occupancy has surpassed 2021 levels, and the number of domestic visitors arriving in the province has grown consistently from the beginning of 2022. The recent lifting of health and safety restrictions (such as mandatory testing and quarantine requirements), as well as restrictions on international travel, are a positive development for the visitor economy in BC.

Recommendations

The BCRTS has developed a unique perspective on the impact of the COVID-19 pandemic on the visitor economy through its survey program and other advocacy. This perspective has equipped BCRTS with the knowledge and expertise necessary to make recommendations on how to best navigate future crises. These recommendations are divided into advice for industry members and partners, and recommendations for government and other policymakers.

Recommendations for industry include:

- 1. Digitalization and fully developed outreach programs are essential to relief program success.** BCRTS was able to collect accurate and timely information in the early days of the pandemic due to preexisting lists of industry members. Strong relationships with businesses in each region allow BCRTS to quickly understand the experience of affected businesses. Database management of stakeholder information will be crucial in future crises. Preemptively developed outreach strategies allow for affected industry members to be contacted and consulted as quickly as possible.
- 2. Insurance solutions specifically tailored by industry would provide greater protection for industry members during times of crisis.** Businesses reported that private insurance systems largely failed to protect members of the visitor economy from the worst impacts of the pandemic. A task force examining the shortcomings of existing solutions and potential improvements in advance of the next crisis could lead to greater protection of industry members, such as recommended by Tourism Industry Association of BC (TIABC).

Recommendations for government and other policymakers include:

- 1. There exists a need to develop scenario analysis and crisis management plans for future crises.** Conducting scenario analysis will reduce the administrative burden of developing and implementing a relief package for affected industries in times of crisis. This will allow policymakers to identify knowledge and capability gaps in advance of the crisis and focus more resources on ensuring that affected firms and industries are adequately supported.
- 2. Access to government-backed credit would increase the coping abilities of the most affected firms in times of crisis.** For many firms and individuals, the financial burden of the pandemic will likely mean that the negative effects of the past two years will be felt for years to come. The creation of an automatic but incremental line of credit instrument would allow firms greater access to capital during periods where it is most needed. Advanced promotion of such a program would allow firms to understand program terms and conditions and reduce the time necessary to deliver funds.
- 3. Programs that are designed to support individuals create distortions for industry when they penalize workers that choose to continue working in the service sector.** Emergency methods of government benefits created tensions between workers and business owners. Careful consideration of the impacts of supports for individuals in advance of the next crisis will likely improve program effectiveness.



Credit: Destination BC / Chris Harris

1. Understanding the impact of COVID-19 on the visitor economy

The first reported case of COVID-19 in British Columbia occurred on January 17th, 2020. By March 17th 2020, a public health emergency was called provincially to curb the spread of COVID-19. This resulted in the mandatory closure of many businesses as well as limits on the size of gatherings. The Federal government announced restrictions on international travel as well as a mandatory 14-day quarantine for those entering Canada on or after April 14, 2020.

After a summer of low case counts and loosened government restrictions, a surge in COVID-19 cases forced the provincial government to enact numerous policies aimed at mitigating the spread of COVID-19 in the province. These restrictions largely continued throughout the fall of 2020 and winter 2021. In late March and April of 2021, further surges in case counts led to restrictions on travel between health regions in the province.

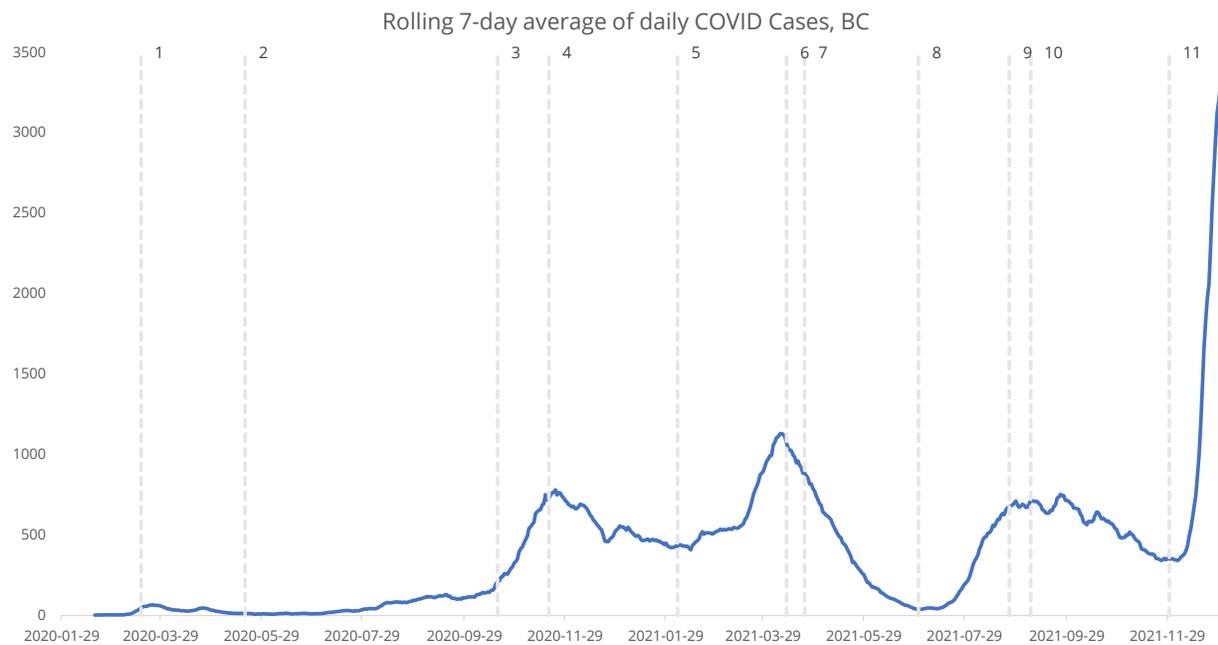
As vaccines became available to the public, the high vaccination rate and low case counts provincially led to the majority of restrictions being lifted in July 2021, however, regional surges in cases led to a combination of provincial and regional restrictions being imposed. Following the arrival of the Omicron variant in December 2021, case counts rose to unprecedented levels heading into 2022. Contained on page 9 is an annotated visual of the evolution of the COVID-19 pandemic in BC.



Credit: Northern BC Tourism/ Andrew Strain

Restrictions on gatherings, travel, and capacity limits have had an outsized impact on the visitor economy. From the early days of the pandemic, it became clear to a number of industry stakeholders and partners that there would be an immediate need to create a mechanism to better understand how the pandemic was impacting tourism firms across the province. There existed a significant void in information regarding how tourism firms were handling the increased uncertainty, new restrictions, and general chaos caused by the arrival of COVID-19 in BC.

BCRTS was formed in 2019 as a partnership between tourism regions in order to better support the visitor economy and pursue common goals. Informed by local expertise and rigorous industry experience, BCRTS initiated the COVID-19 impact surveys as a way to gain a better understanding of the general health of the visitor economy province wide. This information helped equip BCRTS to inform member businesses and wider stakeholders, including the provincial government, about the evolving impact of the pandemic.



<i>Label</i>	<i>Event</i>	<i>Date</i>
1	Public health emergency in BC declared	March 17, 2020
2	Beginning of reopening process	May 19, 2020
3	Second wave is declared in BC	October 19, 2020
4	Imposition of mask mandate and gathering ban	November 19, 2020
5	Gathering ban extended	February 5, 2020
6	Third wave is declared in BC	April 12, 2021
7	Imposition of travel ban between health regions	April 23, 2021
8	Mask mandate is lifted	July 1, 2021
9	Mask mandate reimposed	August 25, 2021
10	Vaccine passport program comes into effect	September 7, 2021
11	First reported case of Omicron variant in BC	November 30, 2021

1.2 Survey design and methodology

The survey program was initially conducted directly by BCRTS partner organization employees on a weekly basis. As the situation surrounding the COVID-19 pandemic was rapidly escalating, BCRTS felt that there was a need for immediate feedback on the business health of tourism firms in their respective regions. Early active engagement in the survey and reporting process by other tourism organizations in the province, especially the British Columbia Hotel Association (BCHA), the Tourism Industry Association of British Columbia (TIABC), and the BC Destination Marketing Organization Association (BCDMOA), allowed for the survey to be widely distributed throughout the sector. Executives and staff of BCRTS members devoted countless hours to ensuring that the survey program had as wide a reach as possible during the early days of the pandemic.

Following three weeks, BCRTS partnered with Dr. Eric Werker, an economist and professor at Simon Fraser University, in forming a team dedicated to co-managing the survey program and interpreting the results. As the situation surrounding the COVID-19 pandemic began to stabilize, BCRTS deemed that it was appropriate to change the survey from a weekly release to a biweekly release. This was later changed to monthly and then bi-monthly as the need for feedback became less immediate throughout the pandemic. During the second and third waves of COVID-19 in winter and spring 2021, the survey was temporarily conducted on a monthly basis before again returning to a bi-monthly survey.

Regularly scheduled research meetings between BCRTS members and external partners ensured that the survey was serving its intended purpose, and that the right questions were being asked of respondents.

The small-scale nature of BCRTS's survey program meant that they had the flexibility necessary to examine the direct and indirect effects of the pandemic across the province in near real-time, significantly ahead of official statistical agencies. In the early stages of the pandemic, data collected by BCRTS surrounding layoffs, business closures, and year-over-year changes in revenue ran ahead of the statistics reported by Statistics Canada by nearly a full month.

As the COVID-19 pandemic evolved, so too did the methods and strategies employed by BCRTS in collecting accurate and timely information through the survey. Early surveys were conducted on a self-selected basis, with interested organizations participating on a purely voluntarily. As of July 2020, survey methodology was changed to a stratified random sample of businesses and organizations within each tourism region. To accommodate for repeated draws of firms and to minimize survey fatigue (especially within the smaller regions) the survey was finally switched to a hybrid method, where only firms that had not been selected within the previous few surveys were eligible for random selection. In order to ensure that results were not being driven by respondents in a single area, provincial averages were weighted by region. Additionally, results were split by organizational characteristics, such as firm size, location, and type.

1.3. Impact and use of survey data

The data obtained through the survey program was [shared publicly on the BCRTS Tourism Resiliency Network's website](#), as well as being shared directly with government partners. This data was also utilized in BCRTS's own efforts by identifying areas in which tourism firms felt that supports were missing or lacking. Additionally, in the early stages of the pandemic there existed a significant void in credible information as to what the impacts of the pandemic on tourism were. The survey program acted as a mechanism to deliver timely information to industry partners as the situation developed. BCRTS drew information from the survey program when building the BC Tourism Resiliency Network, a program that provided one-on-one support to BC tourism businesses over the course of the pandemic. An additional benefit of the survey program to BCRTS was that it gave voices to a wide variety of firms whose experiences may not have been considered if not for the survey program.

The survey program data was shared publicly in order to best inform interested parties in the state of the visitor economy in the province, general sentiments regarding the state of the industry by tourism firms, and emerging practices as the pandemic carried on. This data was used by a number of stakeholders, including regional destination marketing organizations in their annual general meetings, as well as other partners, such as BCHA, TIABC, and BCDMOA.

Results from the survey program were shared directly with government partners on provincial and federal levels. The survey program, as well as Tourism Resiliency Network program, helped identify specific gaps in government program eligibility. A comprehensive review of data received to date regarding the COVID-19 related federal and provincial support programs was delivered to the provincial tourism task force in November of 2020, prior to the announcement of the \$105 million tourism-specific relief package announced in December 2020.

1.4. Summary of survey data

In total, BCRTS released 26 COVID-19 Impact Reports over a 21-month period, spanning from March 2020 to January 2022. During this period, 3,849 businesses and organizations participated in the survey, for a total of 7,952 responses. The average number of responses per survey was 298, with the highest number of responses coming in the March 30, 2020 survey with 496 responses.

The distribution of respondents was fairly even among the five tourism regions that collaborate through the BCRTS, with Thompson Okanagan having the highest number of respondents but also the greatest number of tourism businesses. The province's largest tourism region, Vancouver Coast and Mountains, did not participate formally in the survey program, though BCRTS partner organizations did reach out to firms in the region in a select number of surveys. The Vancouver Coast and Mountain firms that participated were primarily accommodation businesses. The largest proportion of respondents were full-service accommodation firms, with limited-service accommodation firms being the second largest proportion. Roughly

52% of respondents were from rural areas, with 27% and 21% of respondents being located in urban and remote areas respectively. Roughly 84% of surveyed firms had fewer than 20 employees, with only 2% of surveyed firms having 100 employees or more, indicating that the accommodation firms responding to the survey represented the full spectrum from sole proprietor-run bed and breakfasts through to larger destination hotels but with broader representation among small and medium-sized operators.

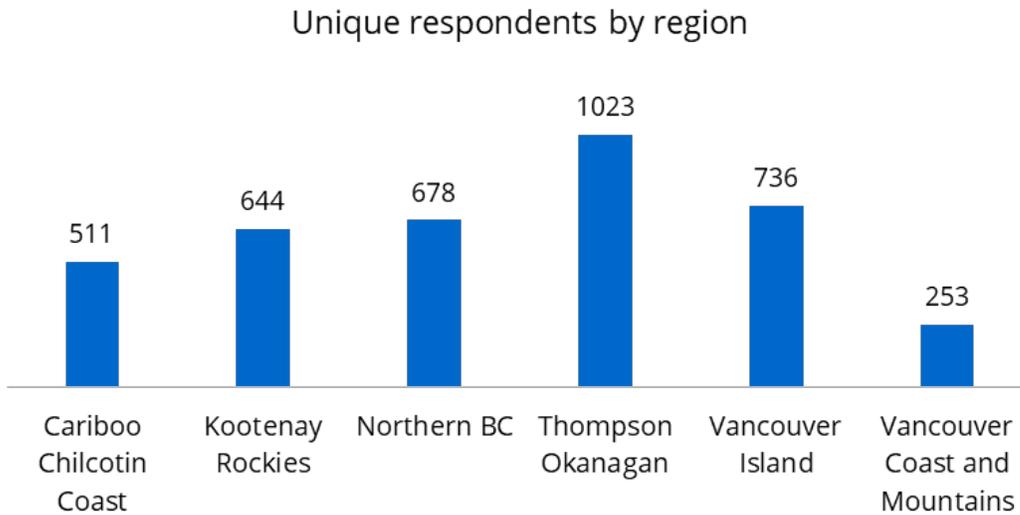


Figure 1: Unique survey respondents by tourism region

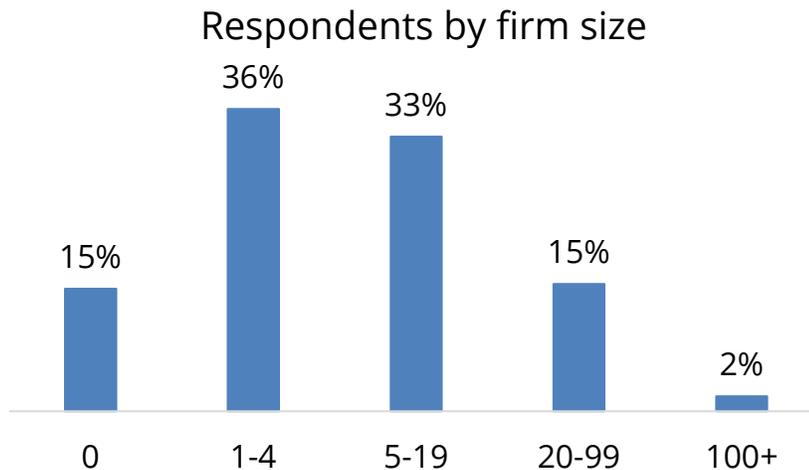


Figure 2: Unique survey respondents by number of employees

The survey heard from many different types of tourism firms across the province, including: accommodation firms, food and beverage firms, activity firms, retail businesses, transportation firms, visitor centres, Indigenous owned businesses, and several other firm types.



Credit: Northern BC Tourism / Kelly Marsh

2. The broad but uneven impact of COVID-19 on BC's visitor economy

The following section contains summaries of a number of the findings of the survey program. As the survey program spanned over 21 months, there were a number of common trends and themes that emerged across the provincial visitor economy at different points in the pandemic. BCRTS was able to monitor and report on these trends through direct engagement with tourism firms, both through the survey program as well as through direct communication with its members.

BCRTS had a unique perspective on many issues throughout the pandemic due to the survey program. Some issues, such as business health moving forward in a post-pandemic tourist economy, remain ongoing. Other issues, such as issues surrounding community acceptance of visitors, appear to be mostly resolved.

2.1 Changes in business conditions over the pandemic

Each survey contained common questions that were tracked over time as well as specific questions related to the evolution of the crisis. The questions tracked over time were on three topics: impact of COVID-19 on current operations, changes in monthly revenue relative to the same month pre-pandemic, and the firm's ability to pay bills. Through these measures we can see the drastic impact of the pandemic on the visitor economy, and the subsequent stabilization that occurred when adjusting to "a new normal."

For many tourism firms in the province, there is still a substantial loss in revenue relative to pre-pandemic, and it appears that the progress that had been made in closing this gap had mostly stalled by the final survey.

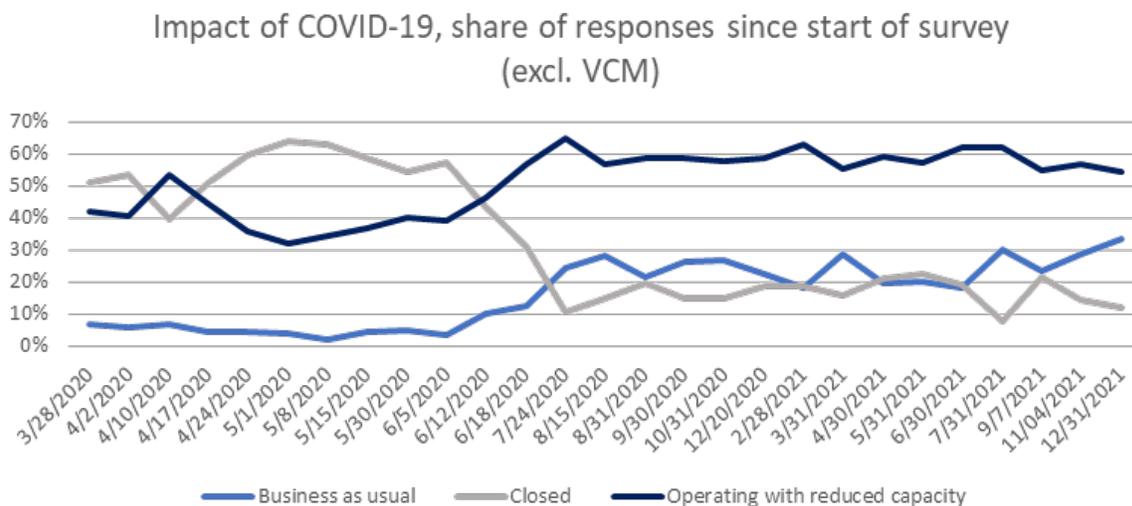


Figure 3: Impact of COVID-19 since beginning of survey. Note: horizontal axis not at a constant time scale but by end-date of survey.

Firms were asked about the direct impact of COVID-19 on their operations. Firms that were closed for reasons other than COVID-19 (such as seasonal closures, closures due to road closings, etc) were not counted as being closed due to COVID-19. The majority of surveyed firms reported that they were closed up until the week of June 6, 2020, when many health and safety restrictions began to be eased across BC. This number ranged from 64% in the first week of May, 2020 to 8% in July 2021. From June 6, 2020 to September 7th 2021, around 60% of surveyed firms were operating with some level of reduced capacity. In the final three surveys, this proportion dropped to roughly 55% of surveyed firms.

As the number of COVID-19 cases rose and fell (and as the number of government restrictions both increased and decreased), so too did the proportion of firms that reported that they were operating with business as usual, or firms that reported that they were currently closed. It appears that by the end of the final survey period, the impact of COVID-19 on firms' business operations had somewhat stabilized, with 34% of firms reporting that they were operating with business as usual, compared to a survey period low of 2% in the second week of May, 2020 (a period where government restrictions on travel and gathering were highly stringent).

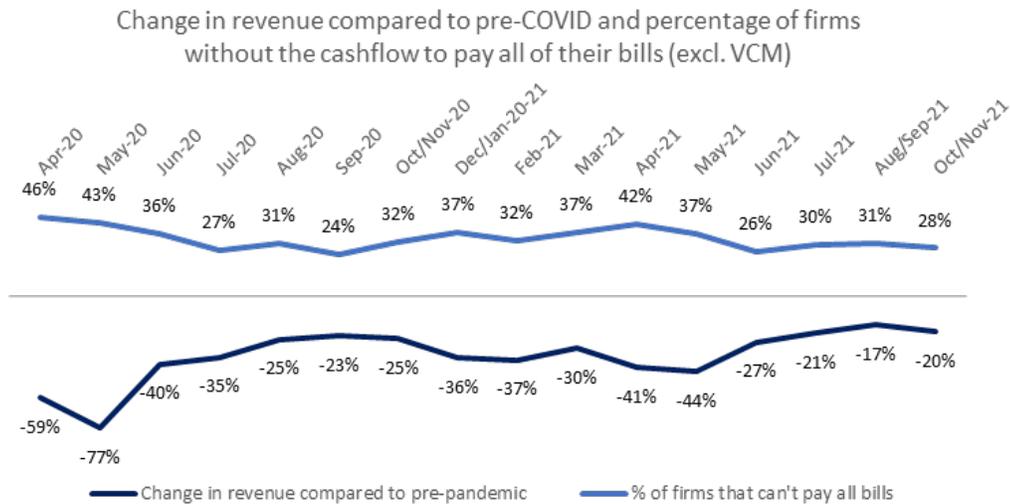


Figure 4: Change in revenue relative to 2019 and percentage of firms that cannot pay 100% of their bills, November/December 2021.

Changes in monthly revenue relative to the same month pre-pandemic were also highly correlated with COVID-19 cases in the province. The largest decrease was in May 2020, where monthly revenue decreased by 77% relative to the same month pre-pandemic. This coincides with a period of strict lockdown measures as well a high level of uncertainty regarding how the pandemic would evolve. This decrease improved somewhat through the summer of 2020, where the decrease in September 2020 relative to September 2019 was 23%. This decrease rose again during the second and third waves in winter and spring of 2021, reaching a decrease of 44% in May 2021.

The proportion of surveyed firms who were unable to pay 100% of their monthly bills followed a similar pattern. Changes in the proportion of firms unable to pay 100% of their monthly bills tended to be of a smaller magnitude from month-to-month than the average change in revenue over the same period.

There appears to be a significant degree of stabilization occurring in both variables as the survey exercise comes to an end. Following the loosening of international travel restrictions and the wide-spread use of vaccines, the proportion of firms reporting that they were unable to pay 100% of their bills as well as the average decrease in monthly revenue relative to 2019 has approached pandemic lows. With this being said, the degree of stabilization into a “new normal” has not meant that the visitor economy has returned to a level comparable to 2019. The strength of the visitor economy globally remains weak, and BC is no different. According to the [United Nations World Tourism Organization](#), tourism’s contribution to global GDP dropped by 46% in 2021 relative to 2019.

2.2. Periodic issues over the pandemic

Financial hardship, debt, and loss of revenue

The COVID-19 pandemic caused incredible financial hardship for firms across the visitor economy. In addition to large decreases in visitor volume as a result of the pandemic, firms also faced a wave of cancellations into the summer of 2020, effectively guaranteeing that businesses would see massive decreases in revenue. From April 2020, some firms faced cancellations into 2021. The large number of cancellations meant that many firms knew that they would not make enough revenue to cover their costs of operating, as the majority of firms needed to make at least 50% of their typical summer sales in order for it to be worthwhile to stay open through the summer.

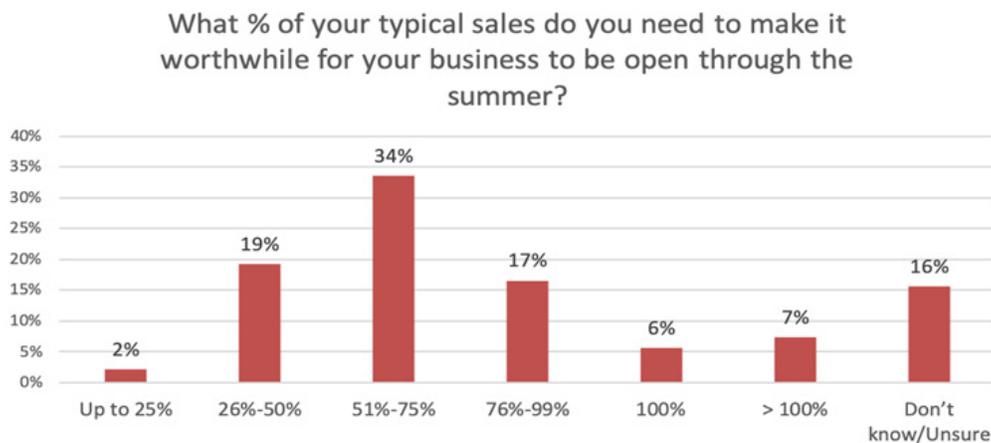


Figure 5: What % of typical sales would make being open worthwhile to your business, May 11 2020

As a result, many businesses were forced to rely on means outside of current revenue and/or profits to pay bills. This included taking on new debt or investment, relying on previous savings of the owner (or other owner income), or retained earnings from previous years. When asked about how they were paying their bills, only 28% of surveyed firms in March 2021 were able to pay their bills using current revenue/profit.

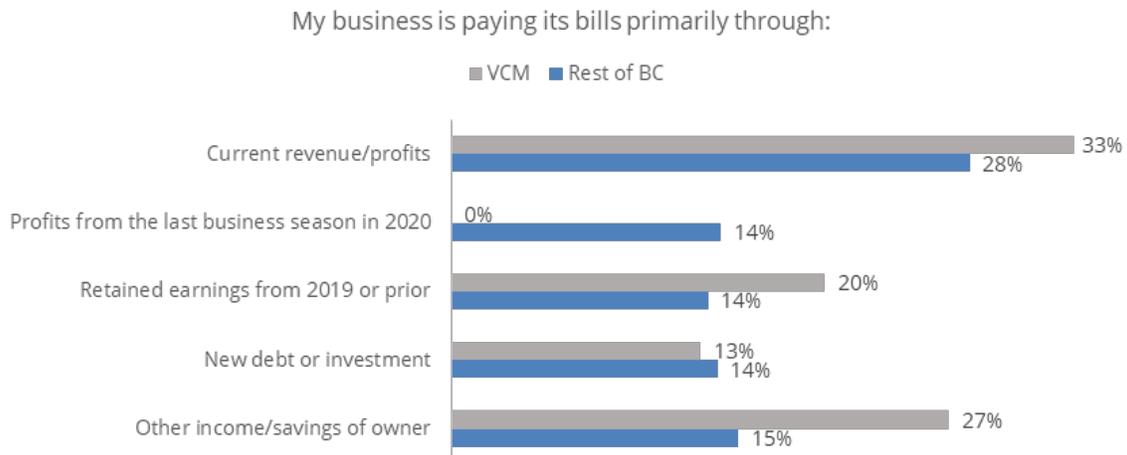


Figure 6: Business financing, March 2021

How long do you think it will take to pay back your COVID-19-related debt?



Figure 7: Paying back COVID-19 related debt, April 2021

Due to the low number of firms who are able to sustain their operations through revenue alone, many firms are going to come out of the pandemic with a substantial level of debt.

In April 2021 43% of surveyed firms estimated that it would take more than two years to pay back COVID-19 related debt, with an additional 4% of firms stating that they are unsure if they will ever be able to pay back their COVID-19 related debt.

This is an example of the long-lasting impacts that the COVID-19 pandemic will have on the visitor economy in British Columbia. Even if visitor volumes return back to pre-pandemic levels, many firms are going to be in a precarious situation due to the actions that they had to take in order to survive the pandemic.

Layoffs and staffing challenges

Over the course of the pandemic, firms have faced numerous challenges regarding their staffing situations. Initially, large scale restrictions on travel and gatherings forced many firms to lay off employees over the course of spring 2020 and into summer 2020. As restrictions loosened and firms reopened, the number of workers rehired or newly hired was generally fewer than the number of workers who were laid off. Additionally, as the restrictions came into effect during what would typically be the beginning of the busiest season for many seasonal (and year-round with a seasonal focus) businesses, there was a large number of seasonal workers that were not hired.

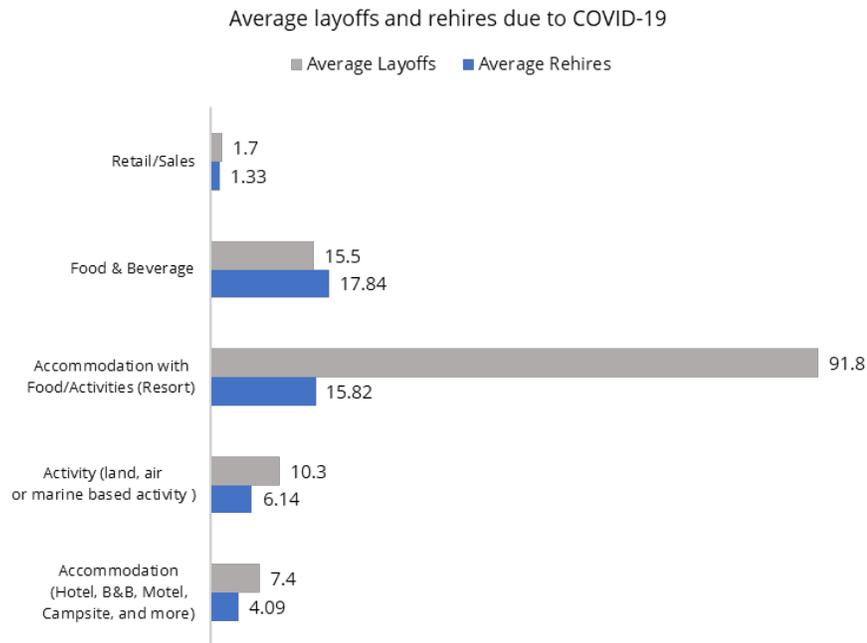


Figure 8: Number of employees laid off and hired/rehired by business type, July 27 2020

The impact of these layoffs (and non-hires of seasonal workers) was not distributed evenly across firm types. Although hotels and resorts tended to have a larger number of employees than many other surveyed businesses, hotels and resorts rehired the smallest share of workers that were laid off.

[Go2HR's March 2022 report on the BC Tourism and Hospitality Labour Market](#) found that employers laid off one permanent employee for every 1.6 permanent staff members they currently have. For many positions in the visitor economy, the average actual hours worked in 2021 had still not recovered to 2019 levels. Go2HR reported that accommodation service supervisors experienced a decline of 10% in average actual hours worked in 2021 relative to 2019. For 2021, the change in hours worked was especially pronounced in the food and beverage industry, with cooks and servers experiencing a decline in actual average actual hours worked of 10% and 9% respectively.

Percentage of full-time jobs lost due to COVID-19 (provincial average)

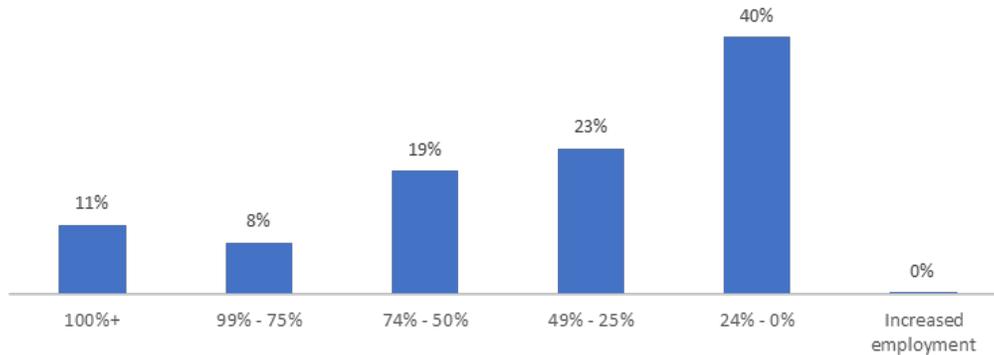


Figure 9: Percentage of full-time jobs lost due to COVID-19, January/February 2021

Beyond layoffs and non-hires, the pandemic fully eliminated a number of positions in tourism businesses across the province. When asked in January/February 2021, nearly 38% of firms reported that more than 50% of full time positions have been eliminated due to COVID-19.

Percentage of usual staffing businesses are operating with

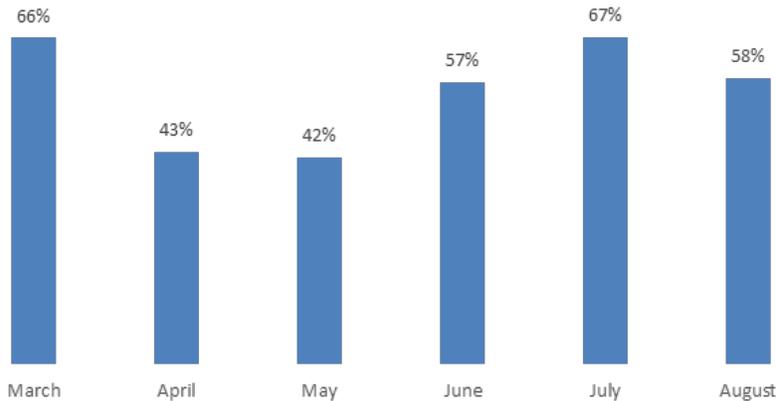


Figure 10: Percentage of usual staffing capacity, July/August 2021

While the number of layoffs initially outpaced the number of rehires, spring and summer of 2021 saw firms facing increased difficulty when trying to fill open positions. Many firms reported that they were operating below their usual staffing capacity throughout the majority of 2021.

The beginning of the pandemic was difficult for both workers and businesses due to the high level of uncertainty and the drastic drop in visitor volume. The vulnerability of the visitor economy to restrictions on travel and other health and safety protocols likely drove a number of workers to exit the industry. Beginning in April 2021, the vacancy rate (measured as the number of vacant positions divided by the total number of occupied and vacant positions) for all industries Canada-wide began to rise. The vacancy rate for the food and accommodation

sector (a key component of the visitor economy) from April 2021 to September 2021 was nearly 7 percentage points higher than the nationwide vacancy rate. This underpins the especially dire circumstances faced by tourism firms. Sufficiently staffing food and accommodation businesses was a difficult task nationwide, and for many tourism firms operating in more remote regions across BC this task was near impossible.

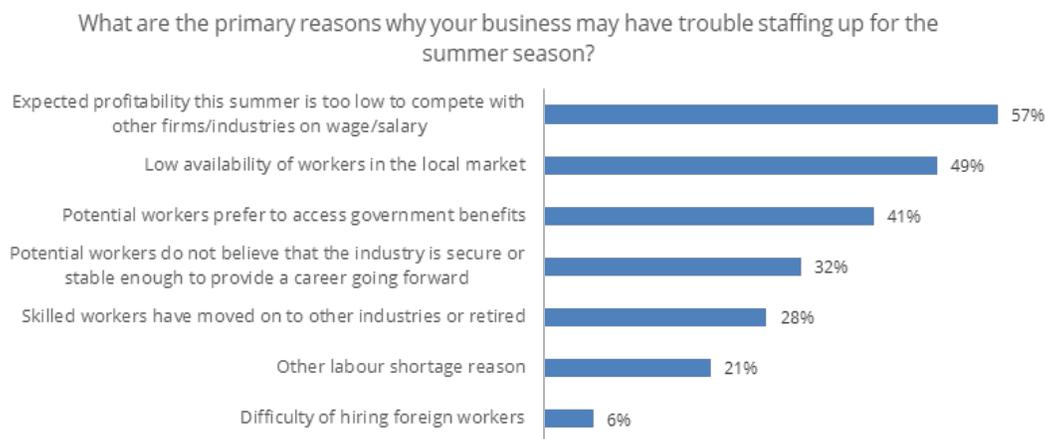


Figure 11: Understanding staffing challenges, May 2021

Firms reported that staffing difficulties were primarily driven by the inability to compete on compensation with other businesses due to low expected profitability over the summer, as well as low availability of workers in the region.

These reasons are part of a few greater themes that were observed in the visitor economy in 2021. Low demand for tourism services (which could be driven by having no international visitors, or hesitant domestic visitors) put tourism business owners in a position that they were not able to pay higher wages to attract employees. Staffing shortages, health and safety protocols, and mass gathering restrictions also limited the ability of firms adequately provide tourism services during the same period. As a result, the supply of tourism services was further reduced. This dual shock to supply and demand was experienced by much of the province throughout 2021.

Further, many firms felt that potential workers preferred to access government benefits. Supports that were intended to ease the difficulties of the pandemic for workers were perceived to have ended up harming tourism businesses. This was a common perception among small business owners nation-wide. The [Canadian Federation of Independent Business's September 2021 survey](#) found that 58% of survey respondents who were not fully staffed felt that their staffing problems could be explained by candidates preferring government benefits over working.

Issues preventing firms from reopening

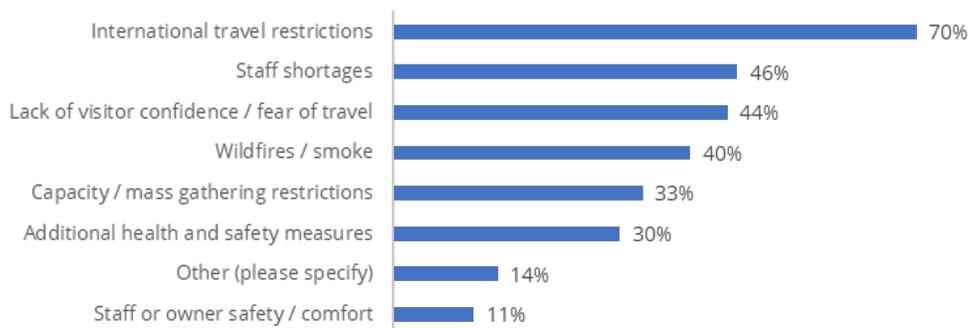
Despite large fluctuations in COVID-19 cases and government restrictions over the course of the pandemic, the proportion of firms who reported that they were operating with reduced operations remained largely unchanged throughout much of the survey program. The small degree of variation in this proportion made it clear that there were structural issues preventing firms from fully reopening. Various government restrictions and fearful visitor attitudes towards travel were perceived to be the biggest barriers to firms fully reopening.

Main issues preventing businesses from fully reopening, April 2021



Unsurprisingly, the main barriers preventing firms from fully reopening were context dependent. Firms surveyed during the period of circuit breaker restrictions in April 2021 were most likely to cite discouragement of interprovincial travel and were more likely to cite capacity and mass gathering restrictions as their barriers to fully reopening when compared to other periods.

Main issues preventing businesses from fully reopening, July/August 2021



During the summer of 2021, firms were most likely to cite international travel restrictions and staff shortages as the largest barrier to being fully reopen. Staffing shortages became especially pronounced during this period, as the proportion of firms citing labour challenges as a primary barrier to fully reopening increased by 33 percentage points from April 2021 to July/August 2021. As the summer is typically the busiest season for many businesses, the lack of both international visitors and available workers served as a significant barrier to fully reopening for many businesses.

Main issues preventing businesses from fully reopening, November/December 2021

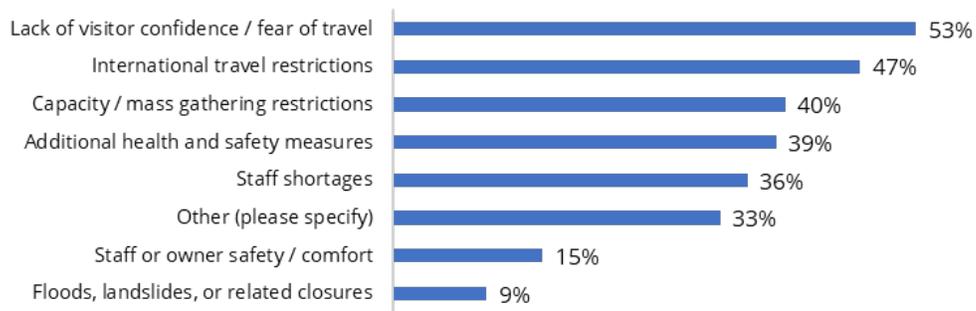


Figure 12: Main issues preventing businesses from fully reopening. Previous page, from top: April 2021, July/August 2021. Above: November/December 2021.

By the final survey, firms were most likely to identify a lack of visitor confidence as being the primary barrier to being fully reopen. However, the issues preventing firms from being fully reopen were much more evenly distributed than prior surveys.

Main issues preventing businesses from fully opening, by subsector

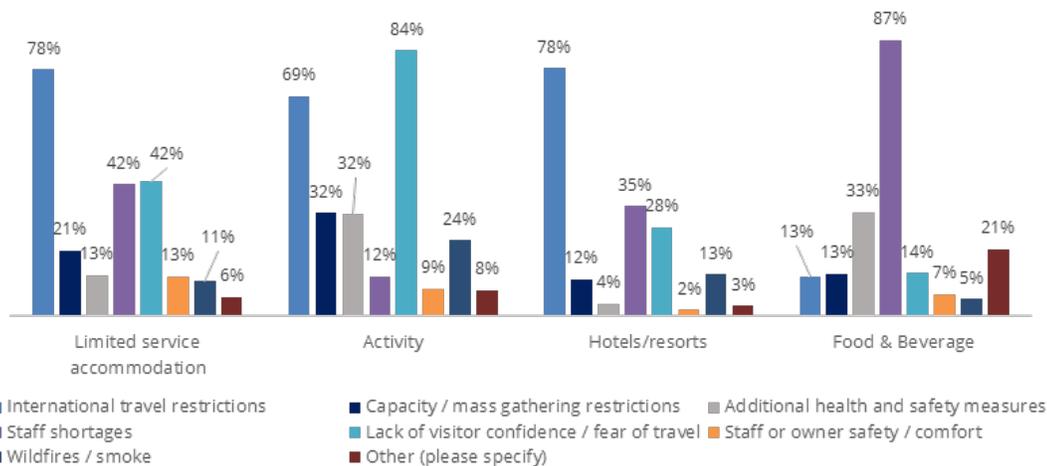


Figure 13: Main issues preventing businesses from fully reopening by business type, July/August 2021

Regardless of timing, firms consistently reported that the main barriers to fully reopening were international travel restrictions, capacity and gathering restrictions, and a lack of visitor confidence in the safety of travel. These barriers are an example of the uneven distribution of the harms caused by the pandemic: firms that are reliant on international visitors were consistently in a worse position than their colleagues who could rely on provincial and interprovincial visitors.

We can also see that different types of firms felt that there were different barriers to fully reopening. Accommodation firms felt that the international travel restrictions were the biggest barrier to being fully reopen, which may be due to interprovincial and provincial visitors being more likely to engage in self-guided travel. Food and beverage firms felt that staff shortages were their biggest barrier to being fully reopen, which is likely due to the fact that food and beverage firms are able to rely on customers from the surrounding area in order to remain open.

The challenge of health and safety protocols

The ever-evolving situation surrounding COVID-19 meant that businesses across BC were subject to new sets of rules and regulations that were frequently subject to change. Interpreting these rules and restrictions, as well as uncertainty surrounding the timeline of restrictions, led to a significant degree of distress amongst surveyed firms.

Initial restrictions on interprovincial (as well as international) travel painted a grim picture of many firms' futures. Even after restrictions on interprovincial travel were lifted, it was seemingly unclear to many would-be visitors that it was alright to travel again. Roughly 44% of surveyed firms thought that their business would not make a profit in 2020 when asked in the weeks of June 8th 2020 and June 15th 2020, but 43% of firms felt that their business would be able to make a profit in 2020 if travel was encouraged within a number of Canadian regions. While health and safety protocols were necessary to contain the spread of COVID-19, lingering fear of the virus combined with the inconveniences of adhering to the health and safety protocols prevented travel volumes from returning to normal.

In addition to creating a significant amount of stress for tourism firms, health and safety protocols often affected the ability of many tourism businesses to deliver their product.

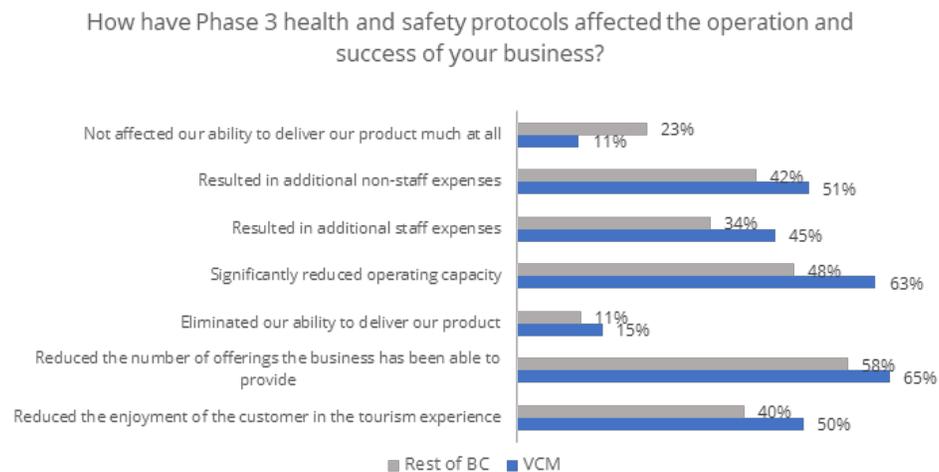


Figure 14: How have health and safety protocols affected your business, November/December 2020

In November/December 2020, firms were asked how new health and safety protocols affected the operation and success of their business. Only 23% of firms stated that the health and safety protocols have not had an impact on their ability to deliver their product. 48% of firms provincewide said that the health and safety protocols significantly reduced operating capacity, with 11% of firms saying that these regulations had completely eliminated the ability to deliver their product.

The highly successful vaccination campaign across Canada helped create a greater sense of normalcy across BC. However, many tourism businesses felt that requiring proof of vaccination would not increase the community acceptance of tourism. 43% of surveyed firms in May 2021 agreed that requiring visitors/guests to show proof of vaccination would increase the community acceptance of tourism, while 36% of firms disagreed. Additionally, a common theme among open-ended questions of the survey program was that many tourism businesses felt that they were ill-equipped to enforce proof of vaccination requirements.

"Requiring visitors/guests to show proof of vaccination in order to access my business's services will increase the community acceptance of tourism."

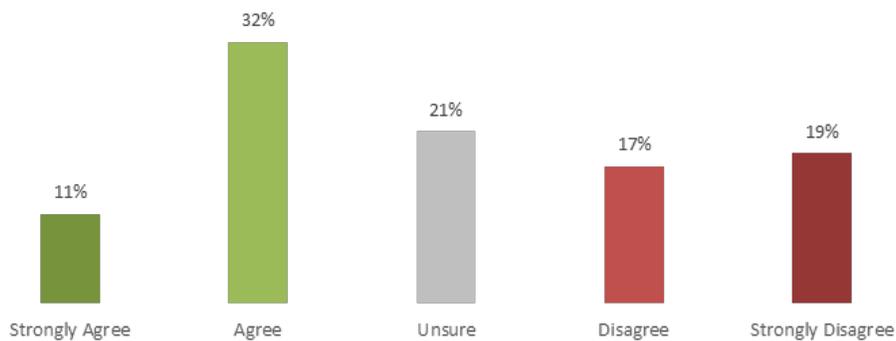


Figure 15: Proof of vaccination and community acceptance, May 2021

"Expanded use of rapid testing could help my business to operate more safely."

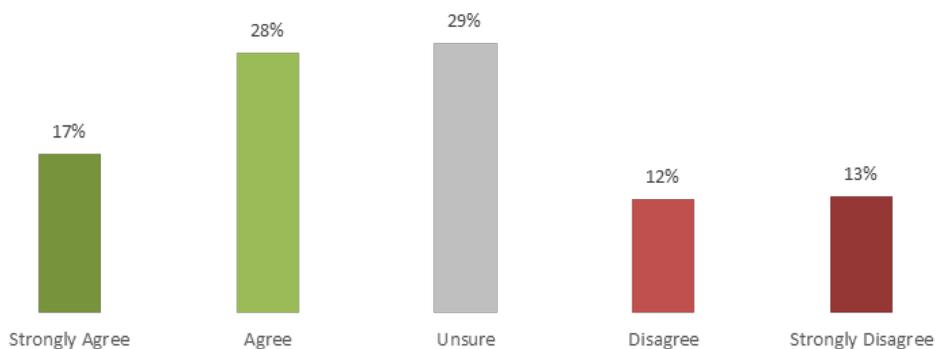


Figure 16: Use of rapid tests, May 2021

In the same survey, nearly 45% of firms agreed that expanded use of rapid testing would help their business operate more smoothly.

2.3. Supporting firms throughout the pandemic

Throughout the pandemic, BCRTS was continuously seeking feedback regarding what type of government supports have been helpful, and where existing programs fell short for tourism firms. The survey program provided material to be communicated directly with government, with the aim of informing future relief programs.

During the early stages of the pandemic, BCRTS heard from surveyed firms that a campaign focused on encouraging within-province travel would be helpful, as well as greater guidance on safe health practices. This speaks to a greater theme amongst survey respondents — while many felt that monetary assistance would be helpful, a larger proportion felt that as long as visitors felt safe traveling their businesses would be alright.

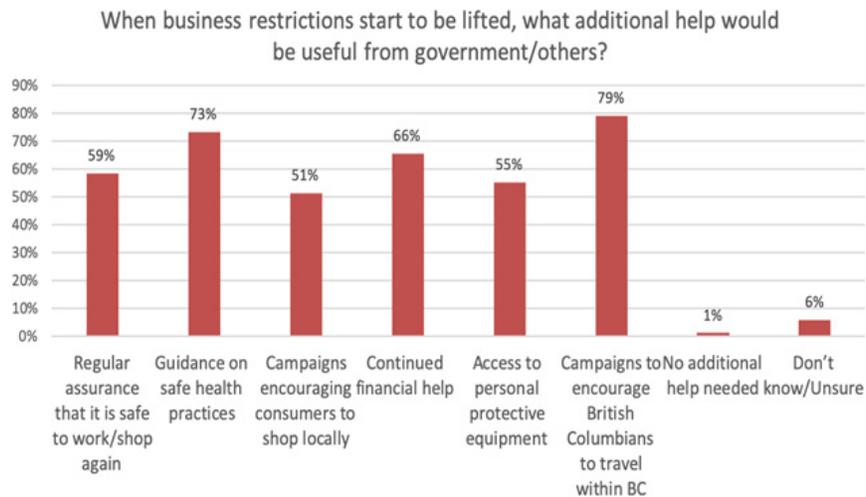


Figure 17: What additional help would be useful from government, May 11 2020

As government programs became available, the initial percentage of firms benefiting from any available programs was quite low. However, in the three week period from beginning April 27th, 2020 and ending May 15th, 2020, the proportion of firms who had received some form of government support, or accessed programs and services, increased by 24 percentage points.

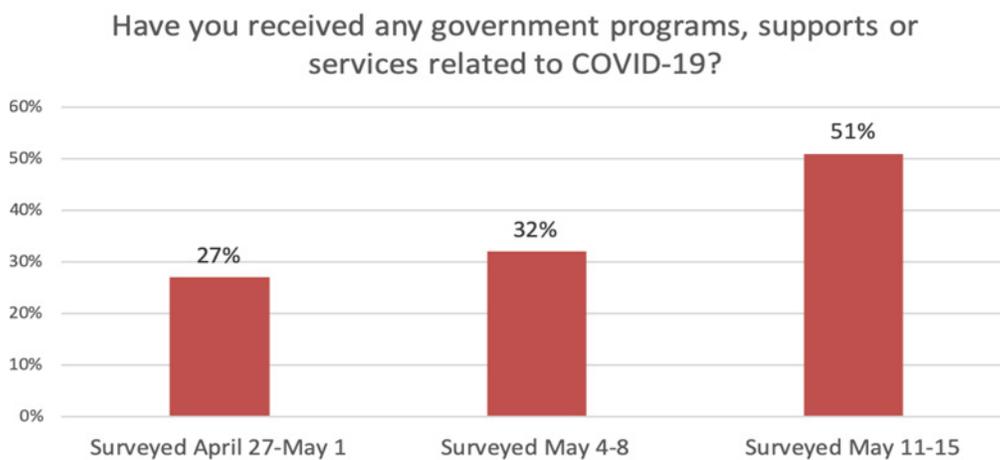


Figure 18: Have you received government assistance, May 11th & May 15th 2020

The large increase in program take-up is likely due to greater awareness surrounding these programs. The most popular programs among survey respondents throughout the pandemic were the Canadian Emergency Wage Subsidy (CEWS) and the Canadian Emergency Business Account (CEBA). The popularity of CEWS slightly waned over the course of the pandemic. The provincial Small and Medium-Sized Business Recovery Grant (SMSBRG) was also quite popular, with 32% of respondents having received funding from the program.

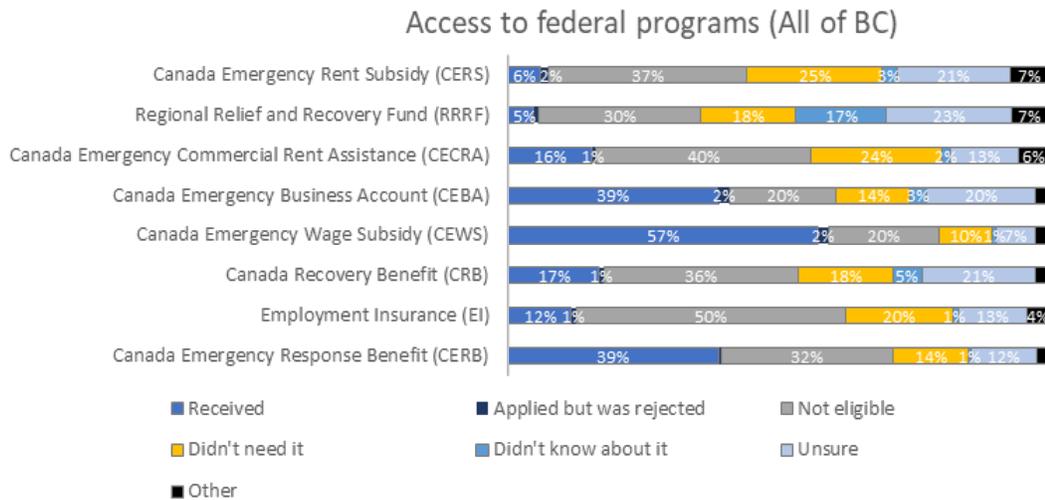


Figure 19: Access to federal programs, November/December 2020

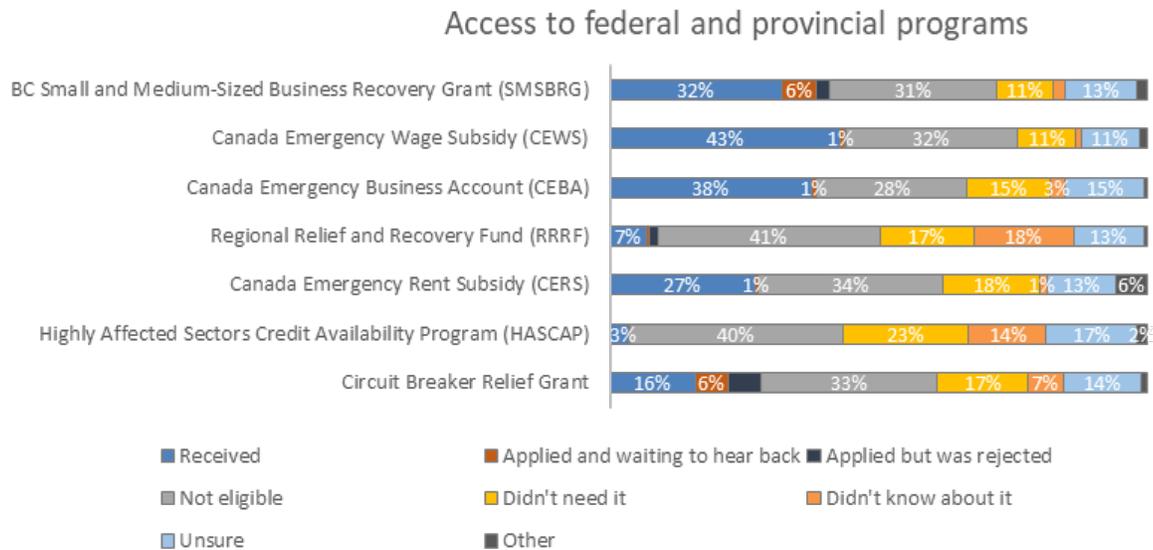


Figure 20: Access to federal & provincial programs, July/August 2021

The proportion of firms accessing the SMSBRG as of July/August 2021 is likely a testament to the program's effectiveness in supporting the visitor economy across the province. At the same time, a near equal proportion of firms reported that they were ineligible for the program, which may be an indication that program eligibility was too narrow.

Non-financial supports received by firms

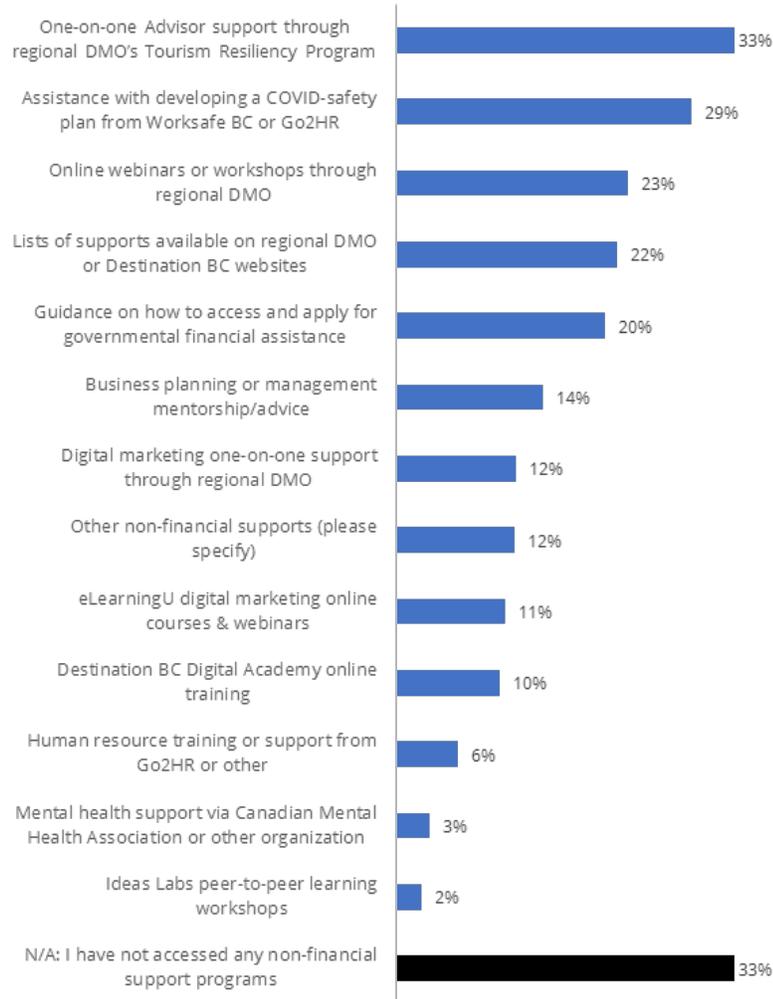


Figure 21: Access to non-financial supports, April 2021

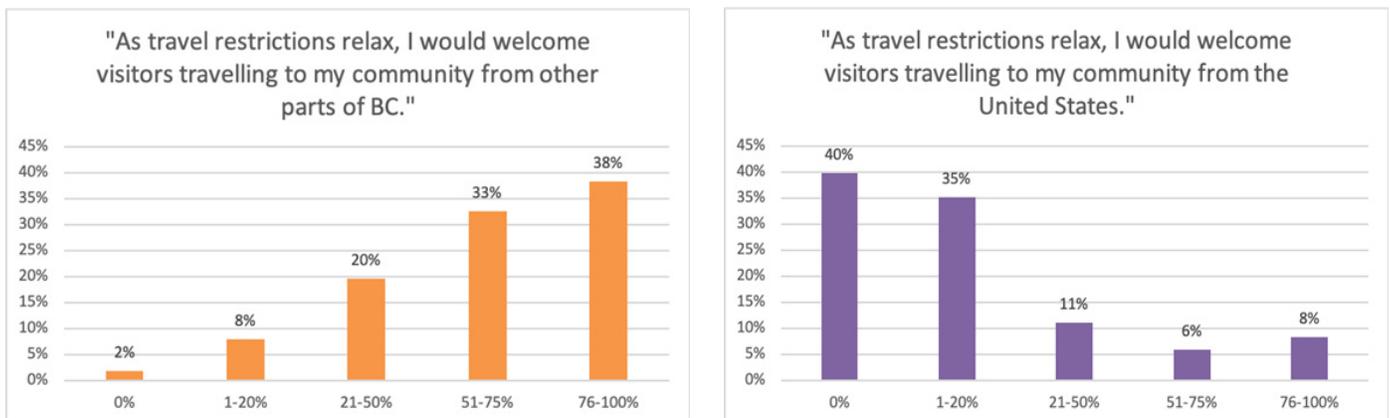
In addition to raising awareness surrounding government programs, BCRTS also devoted itself to raising awareness of non-financial supports available to firms. Roughly a third of firms had one on one meetings with Business Advisors through the Tourism Resiliency Program, and that 29% of firms had accessed assistance through Go2HR or WorkSafeBC on a COVID-safety plan. However, nearly a third of firms did not access any form of non-financial support programs.

2.4 Further challenges to the visitor economy

The COVID-19 pandemic, and the subsequent decrease in visitor volume, was not the only issue that many tourism businesses had to contend with over the course of the survey program. Some issues, such as community attitudes towards tourism, were related to the COVID-19 pandemic. Other issues, such as fires, smoke, road-closures, flooding and other natural disasters served to only create further hardship for tourism business owners.

As previously mentioned, it became apparent through the survey program that there was very strict adherence to public health guidelines across the province. This meant that many tourism firms felt that they were in an uncomfortable position within their community early on in the pandemic. For many firms, their business could not survive without visitors from other communities, putting them at odds with community members who may have felt uncomfortable with visitors in the community. The negative perception of visitors generally increased with the distance of visitor origin.

In June 2020, respondents were asked to guess what percentage of their surrounding community would agree with a number of statements regarding visitors from various destinations. While many felt that members of their community would be welcoming to visitors from other parts of BC, respondents felt that members of the surrounding communities would be less welcoming to visitors from areas outside of BC. Community members were perceived to be the least comfortable with visitors from the United States and other international destinations.



Figures 22 & 23: Community perception of visitors, June 8th & June 15th 2020

The second half of 2021 was immensely challenging for many tourism firms. Extreme heat in the summer of 2021 gradually developed into a series of wildfires within the interior of the province. Smoke from these wildfires reduced visibility and reduced air quality levels across many areas of the province to levels that were hazardous to human health. One potential impact of these wildfires is that it drove visitors away from affected regions and towards areas that were less affected by fires and smoke.

When asked about the impact of smoke and fires on their business, many respondents felt that there was no impact — likely only those in areas far away from the fires. Others agreed that there was some level of impact on their business. One flaw in the survey methodology is that when respondents were randomly selected, completing the survey was completely voluntary. This meant that if a firm was (understandably) preoccupied with the fires, it was unlikely that they were going to give their input to BCRTS through the survey program.

A common theme that BCRTS heard in the open-ended responses from the survey program at the time of the fire was that respondents felt frustrated with government officials who had publicly asked people to avoid the area, but failed to say when it was safe to visit again.

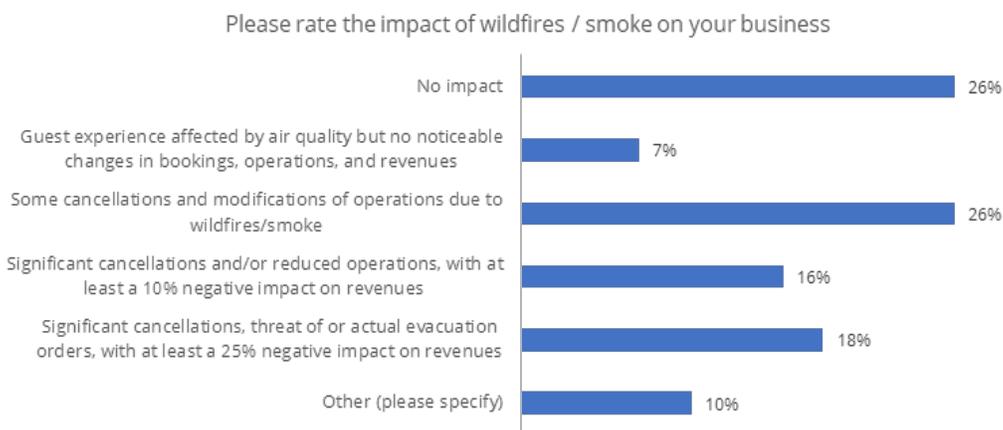


Figure 24: Impact of wildfires / smoke, July/August 2021

In November of 2021, unusually high levels of rainfall created major flooding across the province. This effectively separated many areas of the province from the rest of Canada, and caused road closures across many major highways. BCRTS asked respondents about the impact of the flooding in the final survey, however, a low survey response rate led to little information on the impact of flooding on tourism businesses. Once again, this is likely due to the firms being the most affected being less likely to have the time to respond to the survey.

2.5. Regional differences during the pandemic

A major lesson from the survey program was that the impact of COVID-19 was not uniform across BC, and the experiences varied depending on geography. Each region experienced the pandemic differently and even within tourism regions, there was much variation in the experience of firms. Remote firms were often more dependent on international visitors and could not tap in to provincial and interprovincial visitors. Additionally, regional health restrictions were placed on different tourism regions at different times, leading to different patterns of visitation and also business success.

Some regions, such as Thompson Okanagan, were less reliant on international visitors and firms within the region often felt that they were in a better financial position than firms in other regions. This may be explained by how different the geographic composition of each region's visitor economy is. In areas with more remote firms, restrictions on international travel have led to a larger proportion of firms being unable to pay their bills, while in areas with more rural and urban firms and greater proximity to major urban areas, tourism businesses are better positioned to market themselves to domestic visitors.

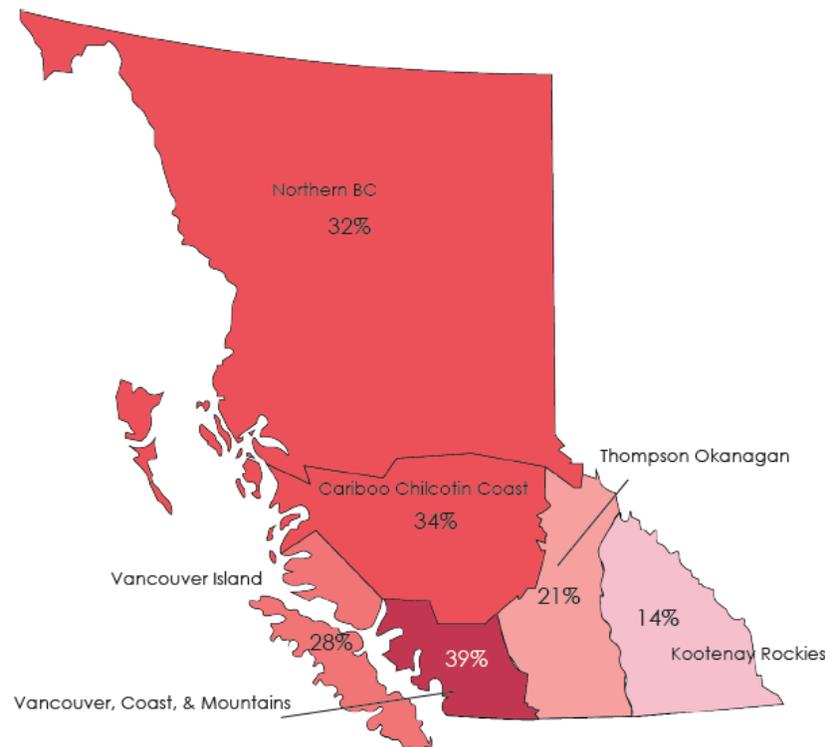


Figure 25: % of firms unable to pay 100% of their monthly bills, March 2021

In addition to differences in geographic composition, the tourism regions of BCRTS experienced the pandemic fundamentally differently. Case loads varied by geography across the province, leading to regionally targeted health and safety protocols. Vancouver Island had relatively low case loads throughout most of the pandemic, while Thompson Okanagan occasionally experienced high COVID-19 cases throughout the pandemic. A surge in infections during the summer of 2021 led to restrictions on gatherings and calls from government officials for visitors to stay away from the region. This was particularly damaging as the region was already dealing with reductions in visitor volume due to smoke and fires.

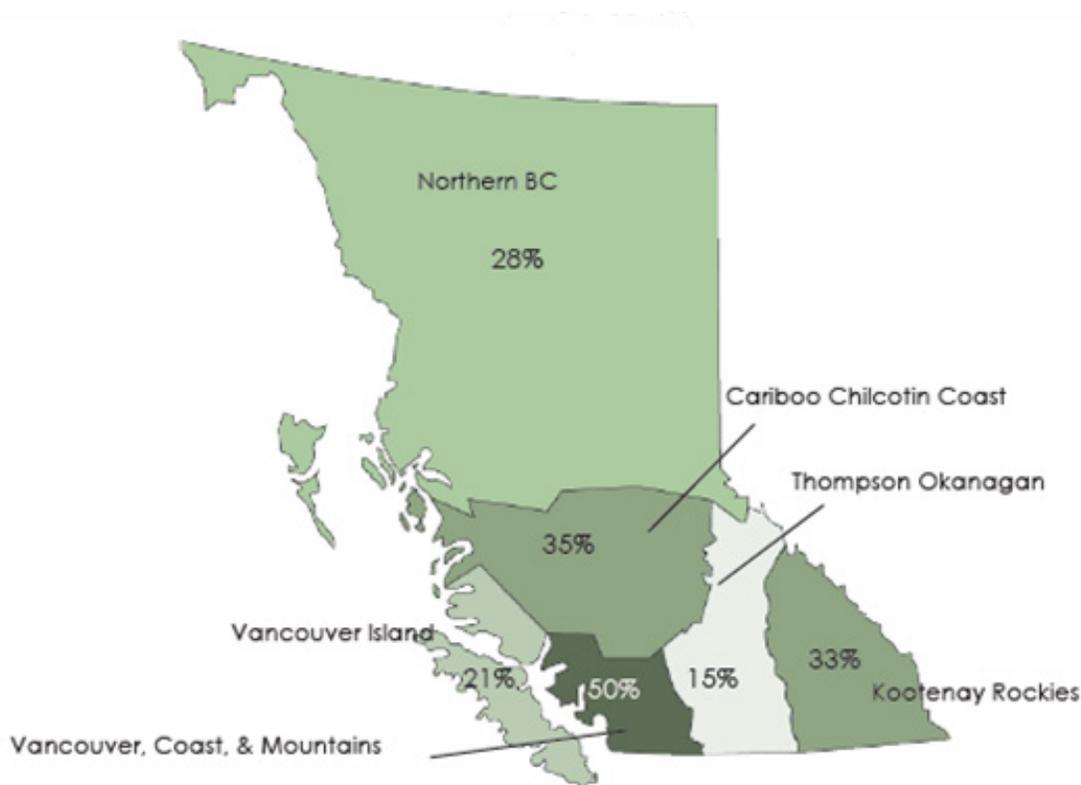


Figure 26: % of bookings that are made by international visitors , March 2021

Regional differences tended to contribute to how firms have moved forward through the pandemic. As of July/August 2021, a higher proportion of firms were closed in Northern BC and Cariboo Chilcotin Coast. Again, this is likely due to differences in geographic composition — both of these areas tended to have more remote destination firms than other regions that were particularly reliant on international visitors. Thompson Okanagan had the highest proportion of firms operating with business as usual, which may be due to a greater proximity to larger population centres as well as a low reliance on international visitors.



Credit: Northern BC Tourism/ Andrew Strain

3. The visitor economy moving forward

The following section contains a summary of the state of the visitor economy in British Columbia as of December 2021, as well as a number of recommendations for future crises. For the most part, there had been a significant degree of recovery from the initial shock at the beginning of the pandemic. Still, in many areas of BC, the visitor economy had still not recovered to 2019 levels. The experiences of tourism businesses in the province contain many lessons on how to effectively manage future crises and disasters.

3.1. State of visitor economy as of December 2021

As of December 2021, the net impact of the COVID-19 pandemic on the visitor economy had varied. While some firms have continued to suffer tremendous losses two years into the pandemic, other firms have recovered to the point that their monthly revenue has exceeded that of 2019.

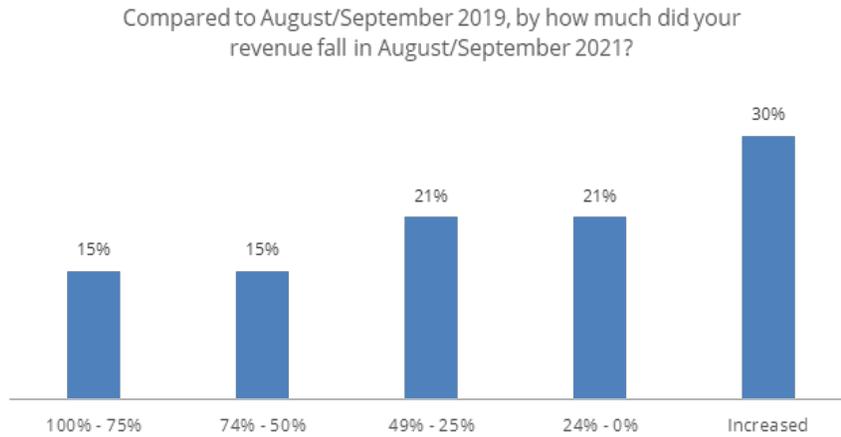


Figure 27: Change in revenue relative to same month in 2019, September/October 2021

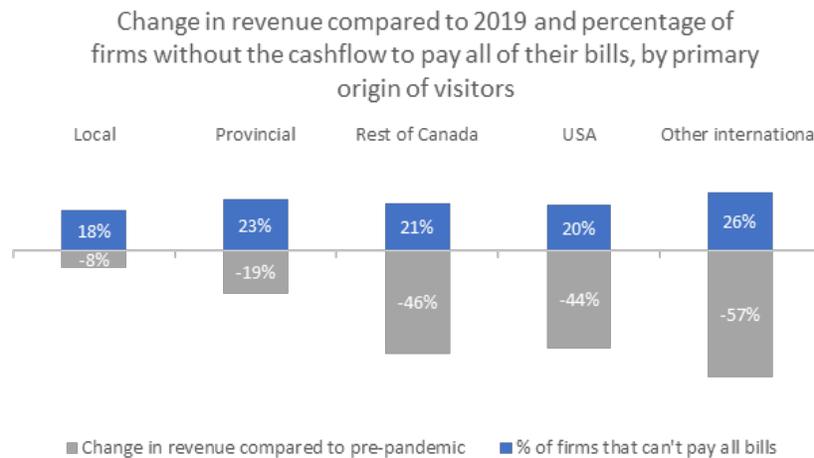


Figure 28: Change in revenue relative to 2019 and % of firms that cannot pay all bills by primary visitor origin, July/August 2021

As a whole, firms that were reliant on international visitors suffered far greater losses than firms that could rely on local and provincial visitors. Moving forward, it is more likely that these firms will hold a higher level of debt, and be more vulnerable to other events and crises. While Canada may have opened its doors to international visitors, it seems unlikely that visitor volumes will return to a level similar to 2019 immediately.

Ability to pay bills by location, latest response

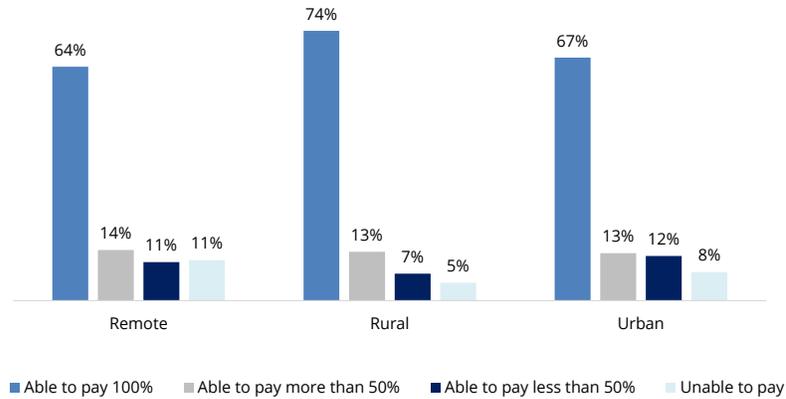
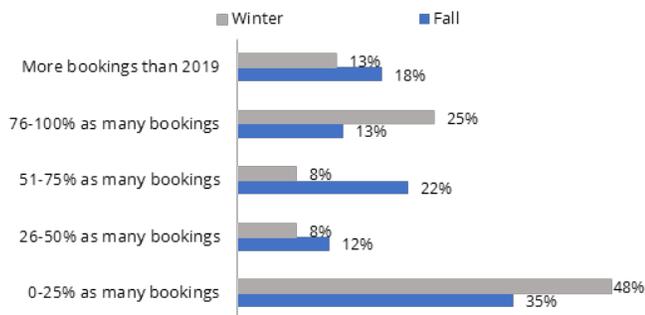


Figure 29: Ability to pay bills by location, based on latest response

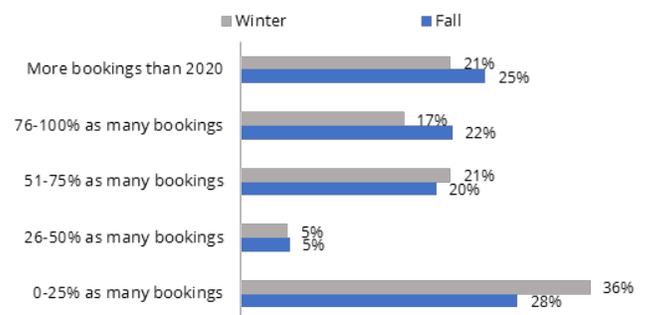
Through additional research, BCRTS was able to learn more about the business models of tourism firms in the province. For many firms, the summer season is where the majority of revenue is made and is essential to paying bills for the remainder of the year. This is not exclusive to seasonal firms, as many firms operate year-round with a busy season in the summer. The timing of both the initial pandemic and the third wave in 2021 meant that government restrictions were imposed during a crucial period for firms to secure bookings and get themselves prepared for the busiest time of the year.

The strength of the visitor economy heading into the summer of 2022 is not strong in relation to pre-pandemic. Bookings for firms have not recovered to 2019 levels, and for many firms the reduction in visitor bookings compared to pre-pandemic was at least 75% as of September/October 2021.

Bookings in 2021 compared to 2019



Bookings in 2021 year compared to 2020



Figures 30 & 31 change in bookings (2021) compared to 2019 and 2020, September/October 2021

Changes to business practices undertaken or planned by firms due to COVID-19

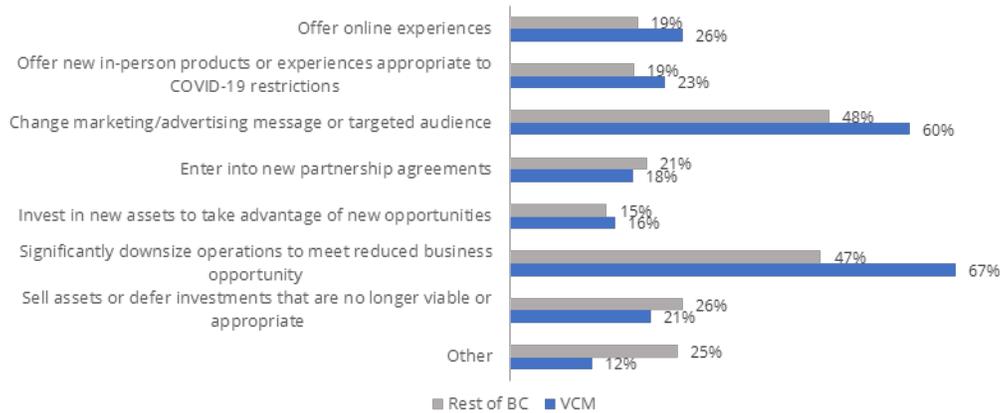


Figure 33: Change in business practices due to COVID-19, November/December 2020

When asked in November/December 2020, nearly 47% of firms had to significantly downsize their operations to meet reduced business opportunity. Firms adapted to the pandemic in a number of ways, including changing their targeted markets and entering into new partnership agreements.

It is worth remembering that the visitor economy does not exist in isolation, and in fact is an important economic and cultural industry for many towns across the province. Tourism businesses provide many benefits and opportunities for the communities they operate in. Visitor spending often goes to other businesses in the communities, and provide an opportunity for outsiders to learn from and about the community.

<p>Tourism brings money into other businesses within the community, which benefits everyone</p> <p>"We proudly serve only local seafood caught by local fishermen." – Rural food & beverage business</p> <p>"We draw people from the coast and neighboring provinces that spend money in the community." – Remote accommodation (limited service)</p> <p>"Our company draws tourists into our area who spend money all over the community including restaurants, hotels and gift shops." – Rural activity business</p>	<p>Tourism provides a learning experience and cross-cultural exchange for people outside and within BC</p> <p>"We are proud to showcase the history of this small rural remote community." – Remote heritage site/museum</p> <p>"We represent over 200 regional artists and give them exposure to visitors and locals alike." – Rural community arts centre</p> <p>"Our business informs people about First Nations and responsible tourism." – Remote activity business</p>
<p>Businesses often donate to charities and support local events, which helps build the community</p> <p>"We donated proceeds to our local fire department" – Rural accommodation (limited service)</p> <p>"We support local charities and events" – Rural resort accommodation</p> <p>"Our businesses donates significantly to local conservation and social causes." – Urban accommodation (limited service)</p>	<p>Tourism businesses encourage recreation, good health and wellbeing</p> <p>"We provide an affordable, fun, friendly and safe way for people to enjoy the outdoors, learn a skill, socialize and meet new people." – Rural hotel/resort</p> <p>"Tourism is what gives life to our community. We are surrounded by breathtaking nature and wildlife." – Rural activity business</p>

Figure 34: Benefits of tourism to the community, June 2021.

The lack of tourism in many communities has led to reduced employment opportunities, significant stress and mental health effects, and fewer opportunities for connecting with other community members. In June 2021, many tourism businesses expressed regret that they were no longer able to play the same role that they did in their communities prior to the pandemic.

3.2. Recommendations for future crises

The survey program gave BCRTS a unique perspective on the impacts of the COVID-19 pandemic in the visitor economy. Consistent feedback across regular intervals allowed BCRTS to monitor the impacts of the pandemic as they developed in near real-time. In addition, frequent engagement with impacted firms and other stakeholders by members of BCRTS helped identify shortcomings in existing government programs and relief efforts. The survey program and additional outreach performed by BCRTS has subsequently equipped BCRTS with the knowledge necessary to make recommendations on how to better handle future crises in the visitor economy and beyond.

These recommendations can be divided into industry specific advice and feedback as well as recommendations for government partners. The experience of the visitor economy during the COVID-19 pandemic will allow for industry stakeholders and government partners to be better prepared for future pandemics. Additionally, as the rate of natural disasters associated with climate change accelerates, the need to take preventative and preemptive measures by the visitor economy and other industries will also increase. Lastly, for a major crisis such as an earthquake, significant international conflict, or another pandemic, the recommendations provided to government and industry have the potential to reduce the logistical burden and allow stakeholders to focus on relief efforts.

Industry specific recommendations

- 1. Digitalization and fully developed outreach programs are essential to relief program success.** Effective database management is key in developing avenues of communication with affected firms during times of crisis. The BCRTS survey program drew from preexisting lists of industry members, and in the early days of the pandemic filled a void of information regarding the health of the visitor economy. Having preexisting means of contacting affected firms greatly reduced the time required to gather and broadcast information during a period where information surrounding the impact of the pandemic was scarce.
- 2. Insurance solutions specifically tailored by industry would provide greater protection for industry members during times of crisis.** Private insurance systems largely failed to protect members of the visitor economy from the worst impacts of the pandemic. Many members of the visitor economy saw large increases in their insurance premiums prior to and during the course of the pandemic, and business interruption insurance did not cover disruptions due to COVID-19 for the most part. A task force to examine the failings of existing products and to consider different solutions in advance of the next crisis would allow for industry members to be sufficiently prepared and protected. Options such as voluntary risk pooling, mandatory risk pooling, catastrophe bonds, and government-led options all have the potential to be an improvement on the status quo.

Recommendations to government and other policymakers

- 1. There exists a need to develop scenario analysis and crisis management plans for future crises.** During times of crisis, a critical aspect of relief program success is the speed at which it is delivered. Conducting scenario analysis in advance of the next crisis will reduce the administrative burden of developing and implementing a relief package for affected industries in times of crisis. This will allow policymakers to identify knowledge and capability gaps in advance of the crisis and focus more resources on ensuring that affected firms and industries are adequately supported. These exercises will improve both the speed of program delivery as well the effectiveness of program funding.
- 2. Access to government-backed credit would increase the coping abilities of on the most affected firms in times of crisis.** Many members of the visitor economy are going to emerge from the pandemic with a significant debt burden, sometimes at unworkable rates of interest. Other firms have sold key assets or spent an outsized amount of effort in developing adaptation strategies in order to ensure that their business survives the pandemic. A government-backed line of credit instrument centred around automatic but incremental increases in credit availability would lessen the financial burden on firms and individuals in future crises. Advanced promotion of such a program would allow firms to understand program terms and conditions and reduce the time necessary to deliver funds.
- 3. Programs that are designed to support individuals create distortions for industry when they penalize workers that choose to continue working in the service sector.** The initial shock of the pandemic led to a massive wave of layoffs, and government programs such as CERB were effective at keeping individuals afloat. The initial reaction to CERB by many business owners was largely positive. Later, many business owners felt that former employees preferred CERB over returning to earlier positions. The factors that contributed to the labour shortages across the pandemic were complex and it is unlikely that one single event or policy could lead the same level of labour shortages seen throughout much of 2021. Many of these factors have been summarized by [RBC Capital Markets](#). For future crises, allowing individuals to access government benefits while also working may help eliminate the tension between business owners and workers that choose to access government benefits.

While the COVID-19 pandemic may be nearing a close, the impacts of the pandemic will likely be felt across the visitor economy for many years to come. The pandemic has had an outsized effect on the visitor economy, and the impacts of the pandemic within the visitor economy were deeply uneven. The reliance on international visitors and the inability of many firms to access domestic visitors has led to a great degree of stress and financial difficulties within the industry. The negative impacts of the pandemic were felt by nearly all members of the visitor economy, with both workers and business owners bearing the brunt of the pandemic.

For industry associations and government partners, the experience of the visitor economy during the COVID-19 pandemic presents a learning opportunity on how to best manage future crises. The lessons learned by members of the visitor economy will be essential in shaping future responses to crises and major events across British Columbia and beyond.

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