

### Table of Contents



BACKGROUND AND METHODOLOGY	3
KEY HIGHLIGHTS	4
DETAILED FINDINGS	6
Travel Intent	6
Concern Welcoming Visitors	11
Comfort Levels by Activity/Transportation/Accommodation	17
APPENDIX: METRICS BY DEMOGRAPHICS	22
APPENDIX: PAST AD-HOC FINDINGS	25

#### **BACKGROUND**



- Destination BC is monitoring British Columbian's current views on travel and tourism as well as tracking travel and tourism behaviour intentions in order to understand the impact of COVID-19 on the tourism industry.
- As such, Destination BC has commissioned Leger (formerly Insights West) to conduct a number of waves of research, one approximately every two weeks, starting May 13, 2020 to track opinions and intentions and watch how results trend over time.
- Note that some changes and additions were made to the questions in a couple of waves to continue to fully meet the research needs of the project.

#### **METHODOLOGY**

- Online survey with at least 800 British Columbian adults (1,000 starting November 26, 2021) via an omnibus (shared study).
- Data is weighted by a number of demographic variables to ensure it is representative of the province.

Wave	Field Dates	Sample Size	Margin of Error (19/20)
1	May 13-17, 2020	824	+/-3.4%
2	May 27-31, 2020	883	+/-3.3%
3	June 10-14, 2020	832	+/-3.4%
4	June 24-28, 2020	827	+/-3.4%
5	July 8-13, 2020	823	+/-3.4%
6	July 22-23, 2020	950	+/-3.2%
7	Aug 5-9, 2020	998	+/-3.1%
8	Aug19-23, 2020	887	+/-3.3%
9	Sept 2-7, 2020	880	+/-3.3%
10	Sept 16-19, 2020	842	+/-3.4%
11	Sept 30-Oct 4, 2020	804	+/-3.4%
12	Oct 13-15, 2020	1,385	+/-2.6%
13	Oct 28-Nov 1, 2020	802	+/-3.5%
14	Nov 12 – 15, 2020	852	+/-3.4%
15	Nov 25 – 30, 2020	817	+/-3.4%
16	Dec 9-14, 2020	876	+/-3.4%
17	Jan 6-10, 2021	826	+/-3.4%
18	Jan 20-24, 2021	815	+/-3.4%
19	Feb 3-7, 2021	813	+/-3.4%
20	Feb 17-21, 2021	836	+/-3.4%
21	Mar 3-7, 2021	827	+/-3.4%
22	Mar 17-19, 2021	1,057	+/-3.0%
23	Mar 31-Apr 5, 2021	827	+/-3.4%
24	Apr 6-14, 2021	1,023	+/-3.1%
25	Apr 28-May 2, 2021	883	+/-3.3%
26	May 12-15, 2021	831	+/-3.4%
27	May 26-30, 2021	831	+/-3.4%
28	Jun 10-13, 2021	830	+/-3.4%
29	Jun 23-27, 2021	808	+/-3.4%
30	Jul 7-10, 2021	822	+/-3.4%
31	Jul 21-24, 2021	830	+/-3.4%
32	Aug 4-8, 2021	832	+/-3.4%
33	Aug 18-21, 2021	830	+/-3.4%
34	Sept 1-4, 2021	1,003	+/-3.1%
35	Sept 15-17, 2021	834	+/-3.4%
36	Sept 29-Oct 3, 2021	845	+/-3.4%
37	Oct 13-16,2021	820	+/-3.4%
38	Oct 27-31, 2021	838	+/-3.4%
39	Nov 10-14, 2021	820	+/-3.4%
40	Nov 26-28,2021	1,002	+/-3.1%
41	Dec 17-19, 2021	1,001	+/-3.1%
71	DGC 11-13, 2021	1,001	77-3.170



#### KEY HIGHLIGHTS – WHAT'S NEW OR CHANGED



#### **TRAVEL INTENTIONS (SLIDES 6-10)**

- The downward trend in travel intention within BC seen last wave has continued this wave, potentially in part due to rising concerns towards Covid-19 and travel restrictions as a result of extreme weather events which included flooding and landslides.
  - Specifically, travel to all destinations in the short term (next 4 weeks) and medium term (next 2-3 months) is slightly lower than
    two weeks ago, but most changes are not statistically significant.
  - The largest, most significant change is for next 4-week travel for an overnight stay in BC, down -4 points to 12%, back to the levels last seen in spring of 2021.
  - Of note, travel intent was measured before BC's latest public health restrictions were put in place on December 22.

#### **CONCERN WELCOMING VISITORS (SLIDES 11-16)**

- BC residents' concern welcoming visitors from various areas has seen an uptick this wave. Concern about US and international visitors which has stayed high for a long period of time has not changed significantly this wave. However, there is a +10 point increase in concern welcoming visitors from other Canadian provinces (to 68% concerned), a +7 point increase for welcoming those from elsewhere in BC for an overnight visit (to 52% concerned), and a +6 point increase for welcoming those from nearby communities for a day trip (to 39% concerned).
- Measured every 2 waves, concern welcoming visitors in specific provinces shows a similar pattern, with increases in concern levels for welcoming visitors from all provinces. The largest increase is seen for welcoming visitors from Quebec (+14 points to 74%), Ontario (+13 points to 72%) and the Atlantic provinces (+13 points to 62%).

#### KEY HIGHLIGHTS – WHAT'S NEW OR CHANGED



#### **COMFORT WITH ACTIVITIES/MODES OF TRANSPORTATION (SLIDES 17-21)**

- Comfort levels with various activities, transportation modes and accommodations is down from two weeks ago, with statistically significant decreases for all 12 factors tracked. The magnitude of decreases ranges from being down -5 points to -14 points since last wave. This brings comfort in undertaking these activities to similar levels as those seen in May 2021. This is likely in part due to rising concerns towards COVID-19.
- The activities which saw the greatest decline in comfort levels were:
  - Comfort visiting Indoor Tourist Attractions decreased -14 points to 48%.
  - Comfort travelling via Car / RV decreased -13 points to 67%.
  - Comfort travelling via Ferry decreased -12 points to 62%.
  - Comfort travelling via Airplane for non-essential travel decreased -12 points to 37%.
  - Comfort staying at a Hotel / Motel decreased -14 points to 57%.

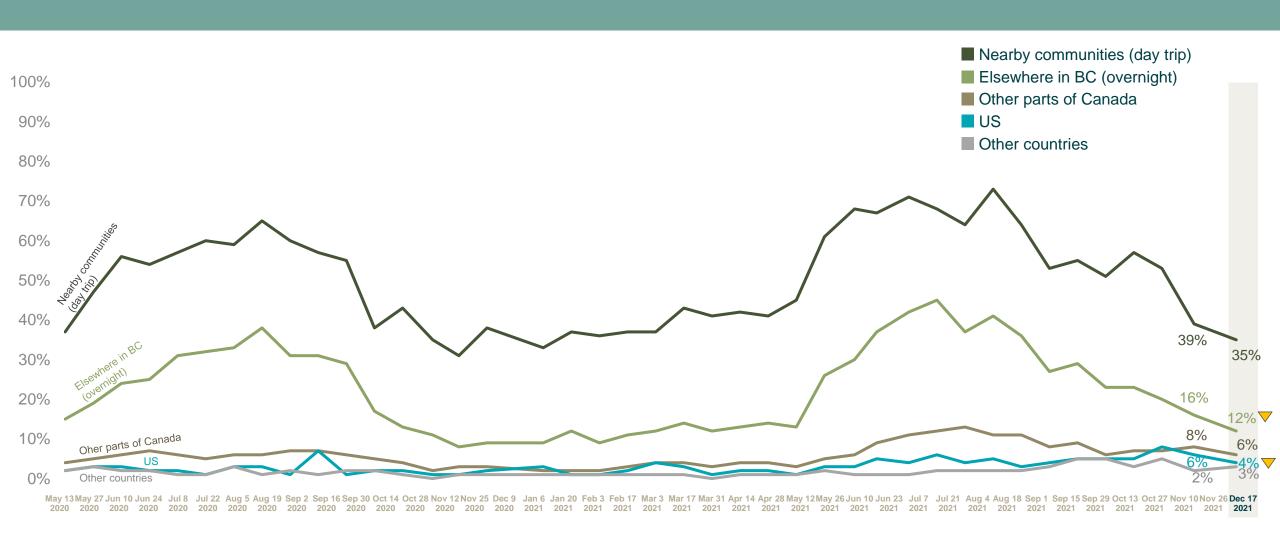


### TRAVEL INTENT



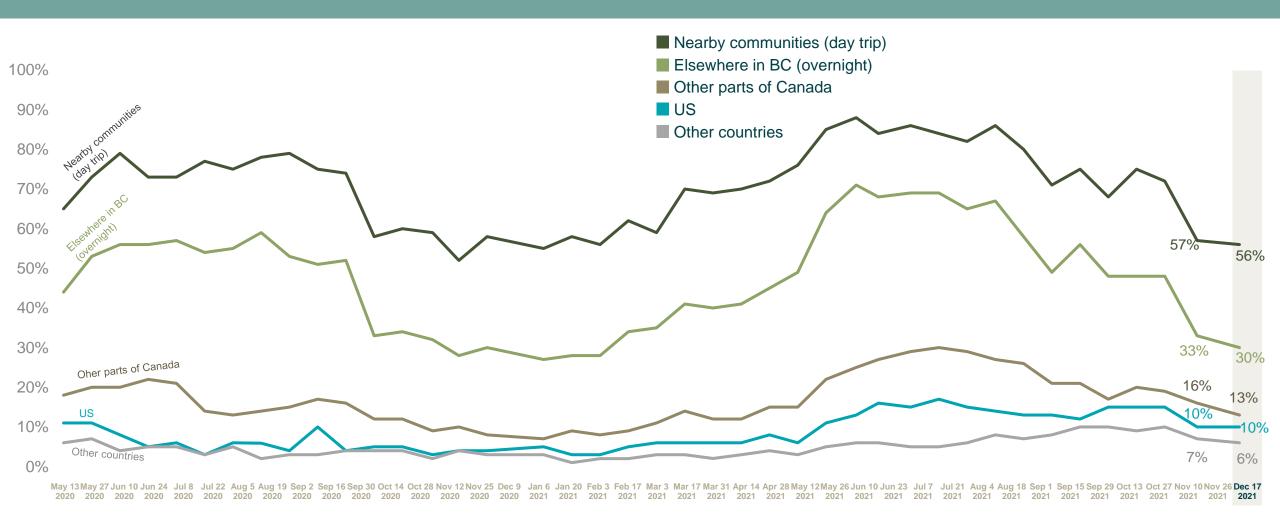
### Tracking British Columbians' Travel Intent Within Next 4 Weeks (By Destination)





### Tracking British Columbians' Travel Intent Within Next 2-3 Months (By Destination)

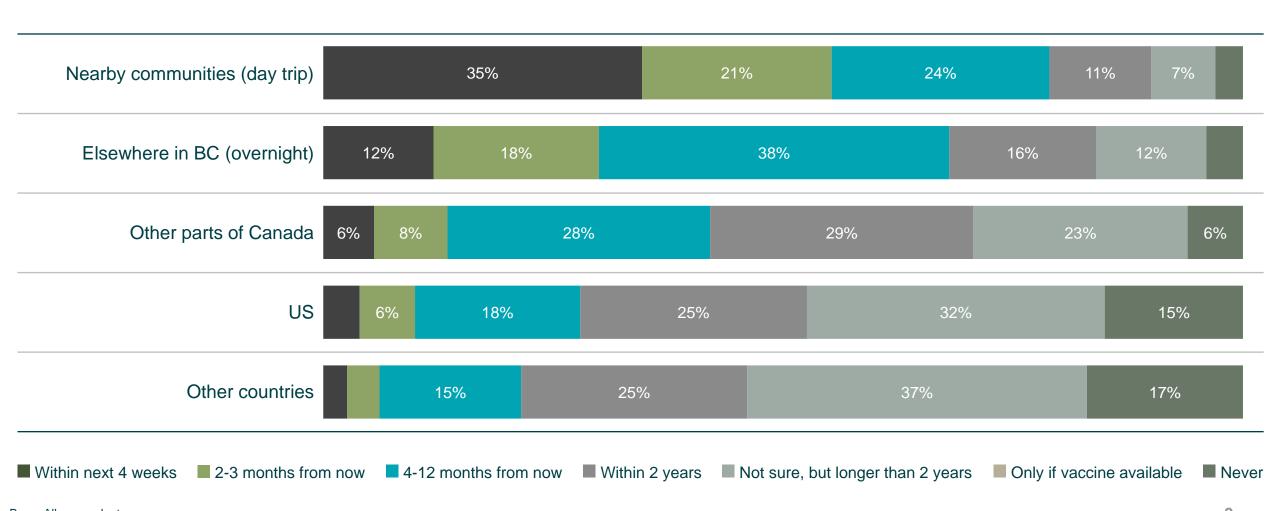




### Snapshot Of British Columbians' Travel Intentions



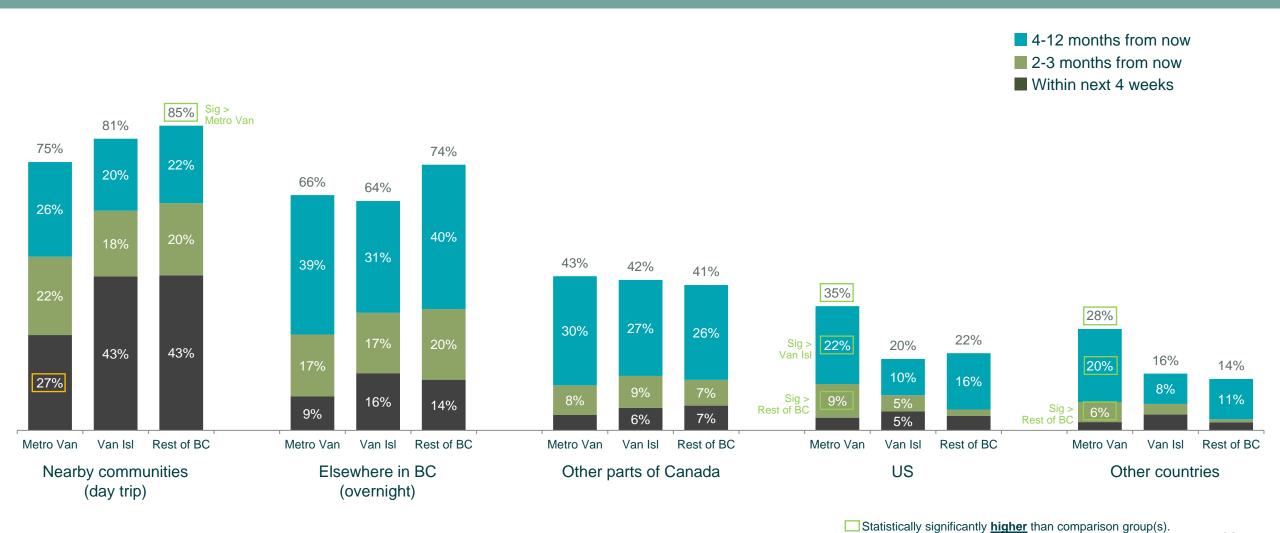
(Wave 41 – Dec 17, 2021)



## Snapshot Of British Columbians' Travel Intentions By Region



(Wave 41 – Dec 17, 2021)



Statistically significantly lower than comparison group(s).



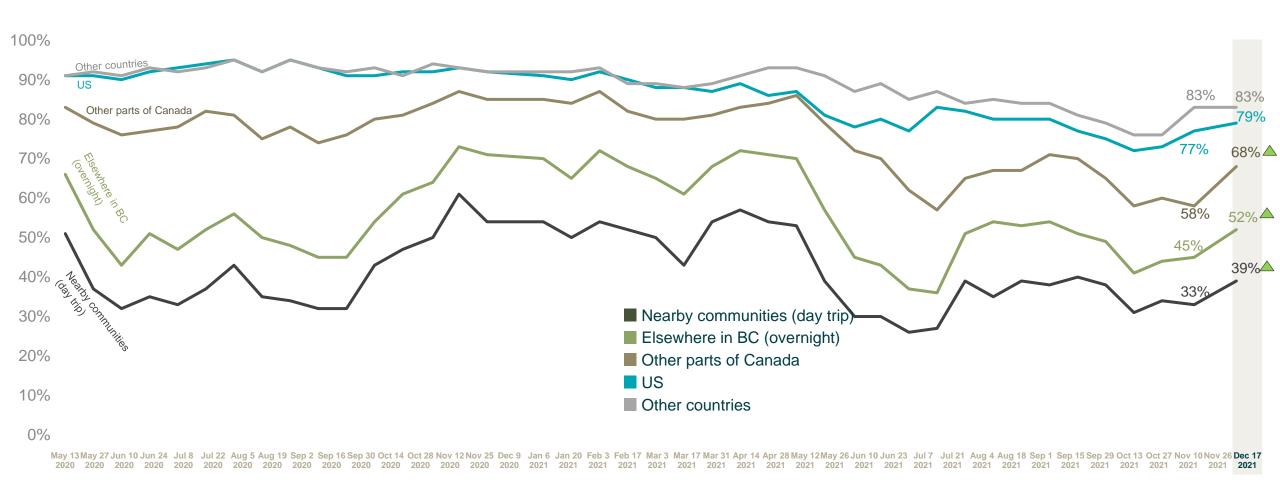
### **CONCERN WELCOMING VISITORS**



### Tracking British Columbians' Concern Welcoming Visitors



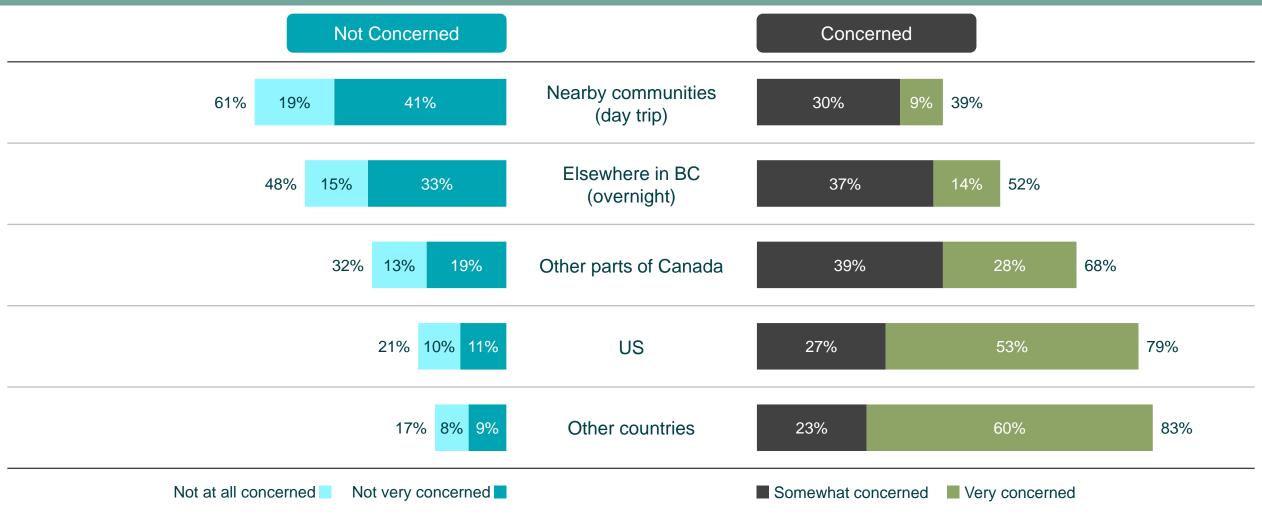
(Total Very/Somewhat Concerned By Visitor Origin)



### Snapshot Of British Columbians' Concern Welcoming Visitors RESTINATION DESCRIPTION OF BRITISH COLUMBIAN



(Wave 41 – Dec 17, 2021)

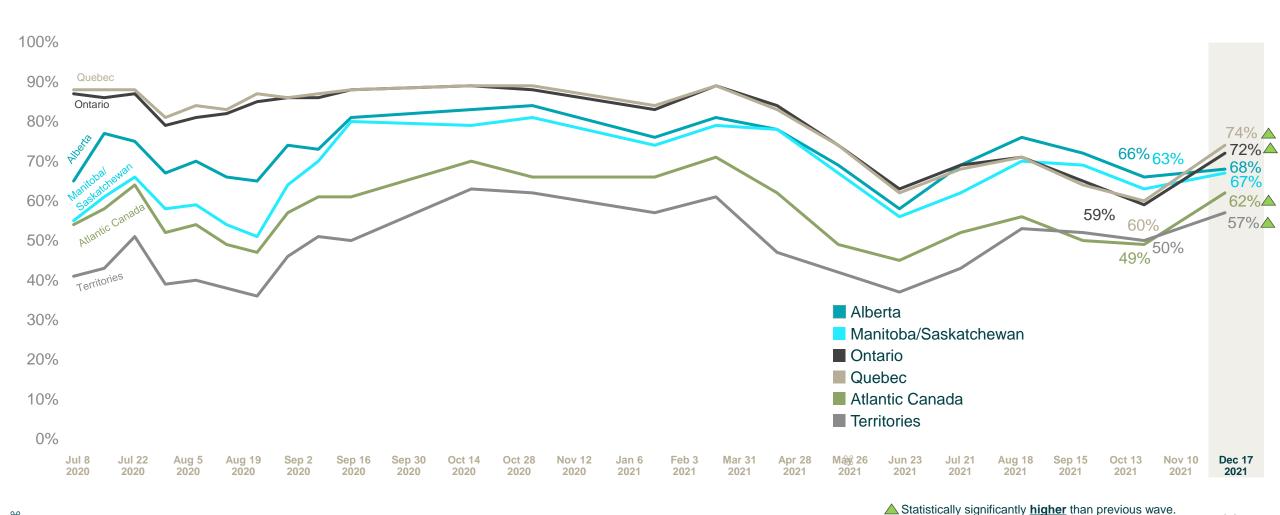


Base: All respondents

## Tracking British Columbians' Concern Welcoming Canadian Visitors



(Total Very/Somewhat Concerned By Origin)



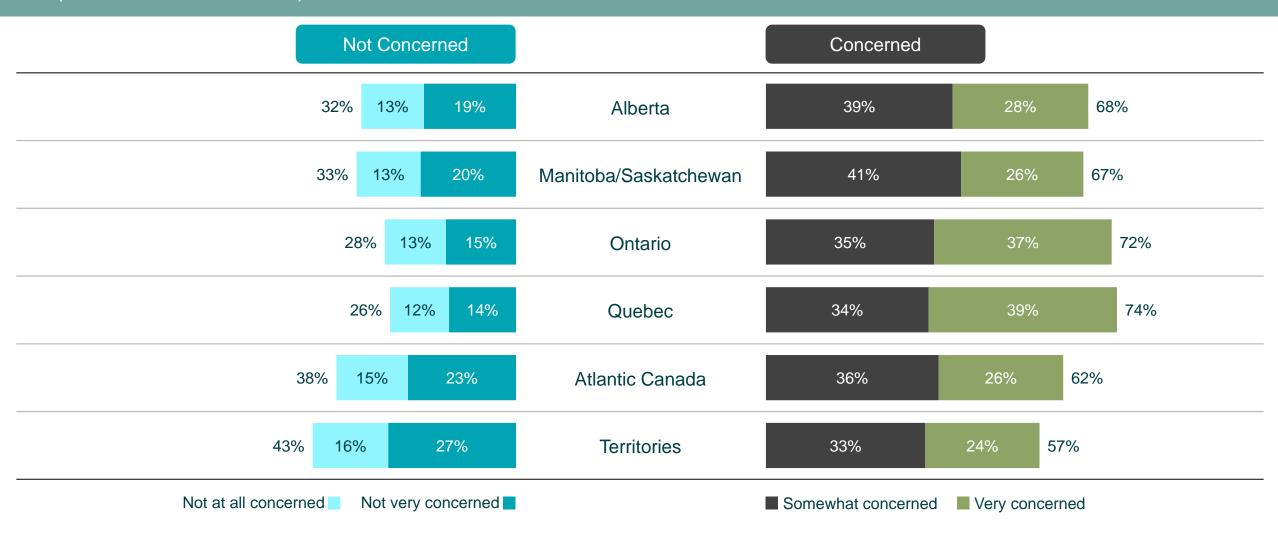
<sup>&</sup>lt;sup>ℜ</sup>Question frequency changed from bi-weekly to monthly starting November 12, 2021. Base: All respondents

Statistically significantly **Ingrier** than previous wave.

### Snapshot Of British Columbians' Concern Welcoming Canadian Visitors



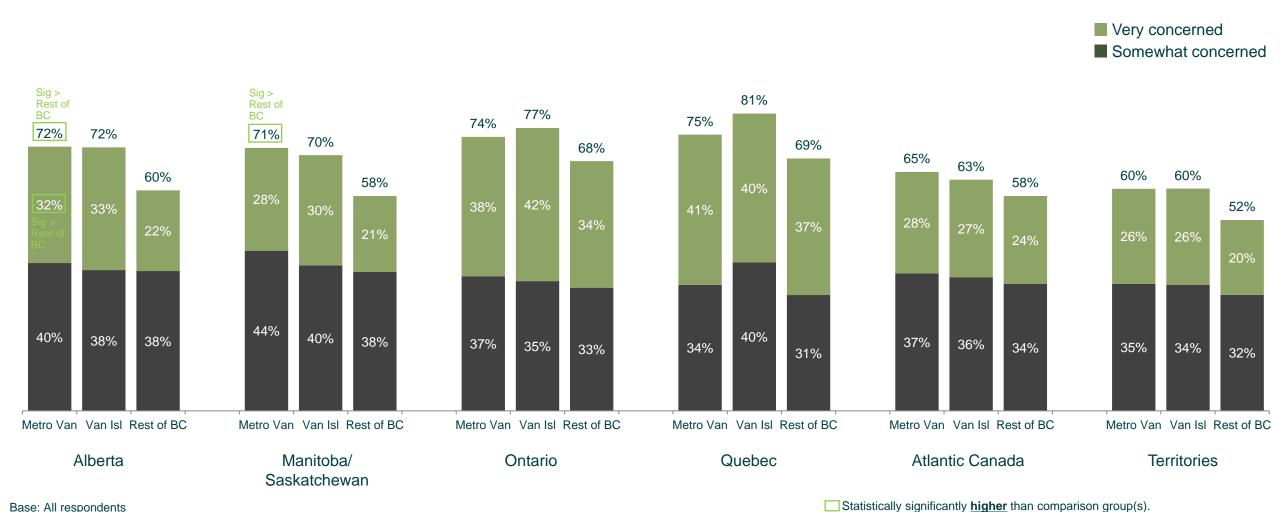
(Wave 41 – Dec 17, 2021)



### Snapshot Of British Columbians' Concern Welcoming Canadian Visitors By Region



(Wave 41 - Dec 17, 2021)



Base: All respondents

D2a. And how concerned would you be with the following types of Canadian visitors making non-essential trips into your community over the next few weeks?

Statistically significantly **lower** than comparison group(s).



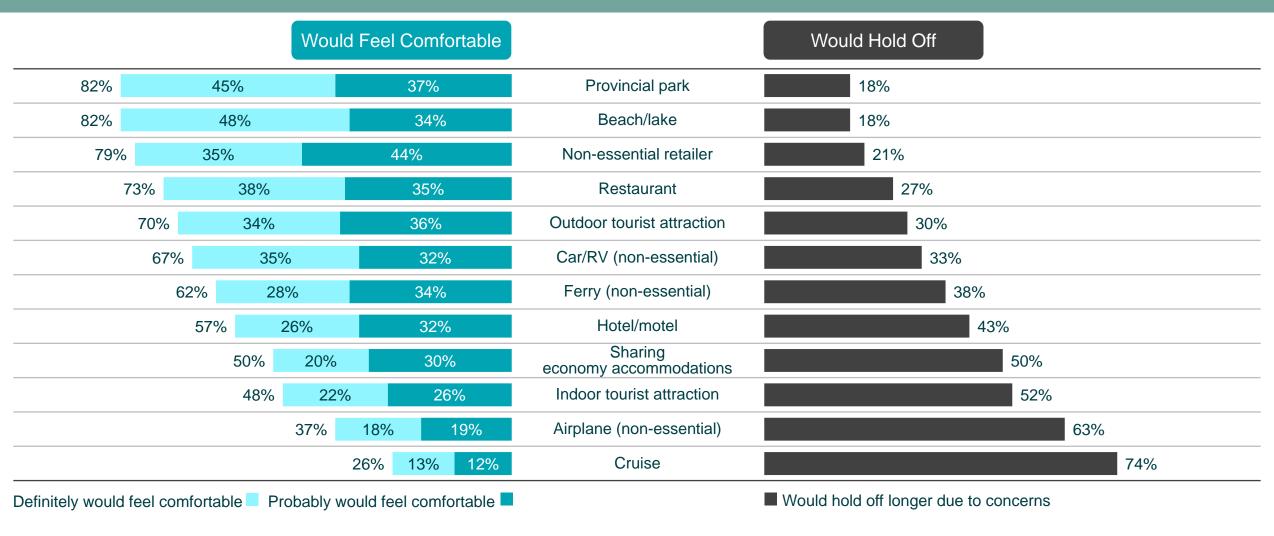
## COMFORT LEVELS BY ACTIVITY / TRANSPORTATION / ACCOMMODATION



# Snapshot Of British Columbians' Comfort Levels With Activities, Transportation and Accommodation



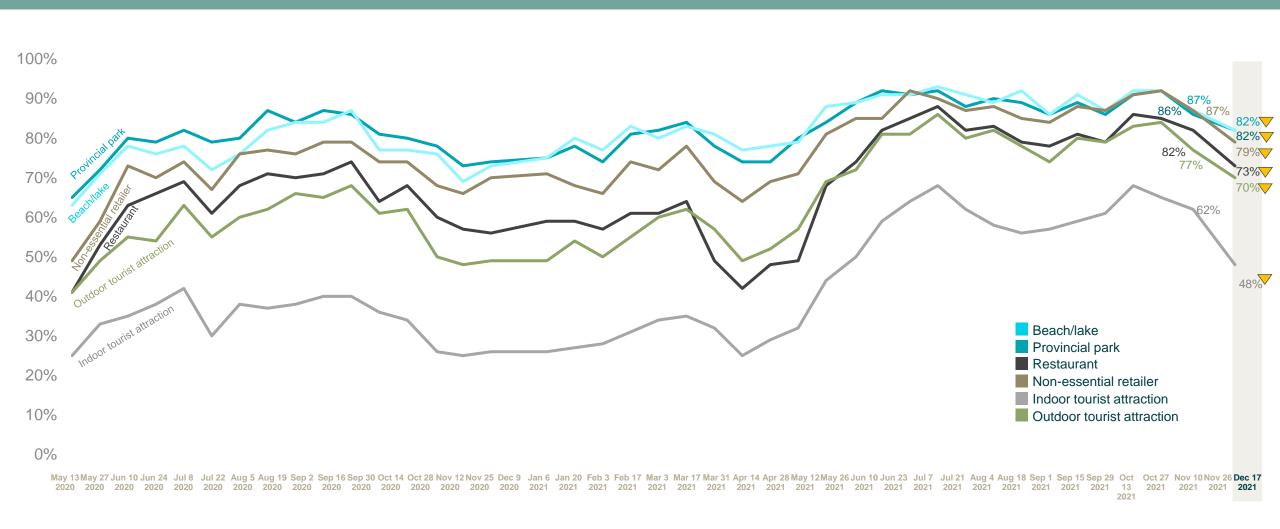
(Wave 41 – Dec 17, 2021)



# Tracking British Columbians' Comfort Levels With Activities



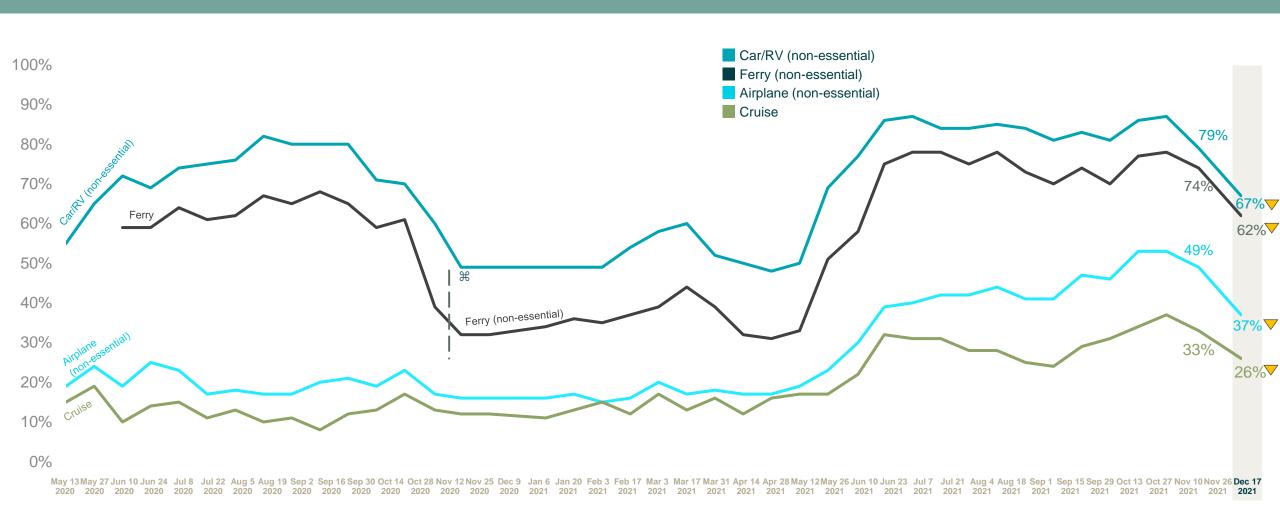
(Total Definitely/Probably Would By Activity)



# Tracking British Columbians' Comfort Levels With Transportation Modes



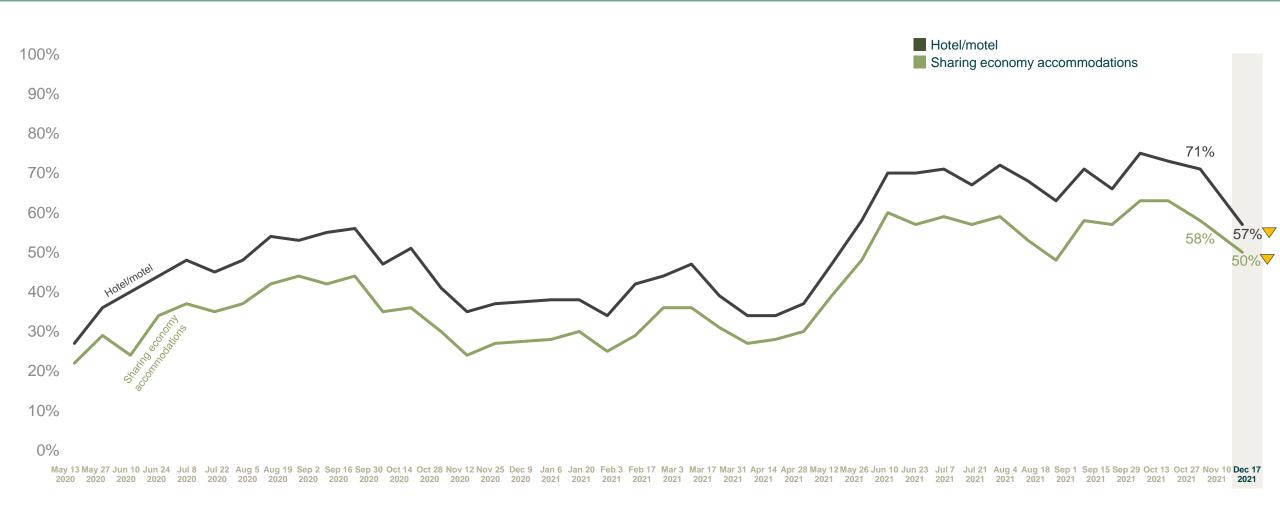
(Total Definitely/Probably Would By Transportation)



## Tracking British Columbians' Comfort Levels With Accommodation



(Total Definitely/Probably Would By Accommodation Type)





### **APPENDIX: METRICS BY DEMOGRAPHICS**



### Snapshot Of British Columbians' Travel Intent By Demographics

76%

24%

33%

Female

65%

38%

10%

Female

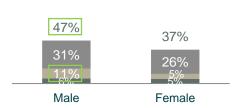












Gender

83%

23%

37%

Male

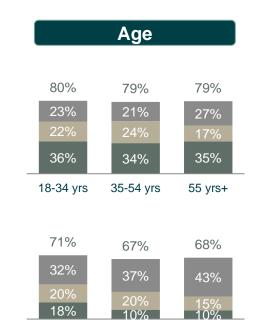
71%

39%

19%

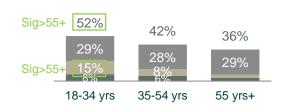
14%

Male



35-54 yrs

55 yrs+



18-34 yrs







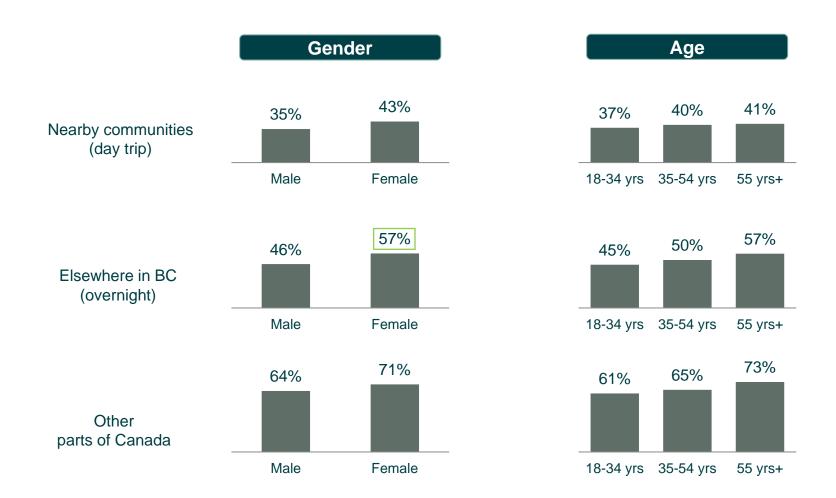
Statistically significantly <u>higher</u> than comparison group(s).

Statistically significantly **lower** than comparison group(s).

## Snapshot Of British Columbians' Concern Welcoming Visitors By Demographics



(Total Very/Somewhat Concerned, Wave 41 – Dec 17, 2021)





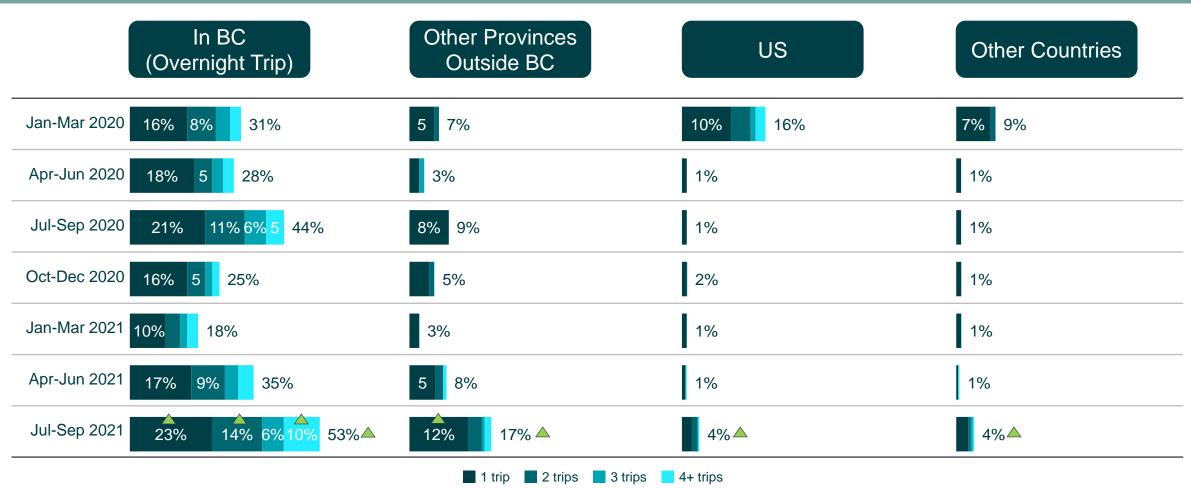


### **APPENDIX: PAST AD-HOC FINDINGS**



#### **Past Travel**





Base: All respondents

Note: Jan-Mar, Apr-Jun and Jul-Sep asked in Wave 14/Nov 12; Oct-Dec asked in Wave 17/Jan 6; Jan-Mar 2021 asked in Wave 23/Mar 31; Apr-Jun 2021 asked in Wave 30/July 7, 2021; Jul-Sep 2021 asked in Wave 37/Oct 13, 2021.

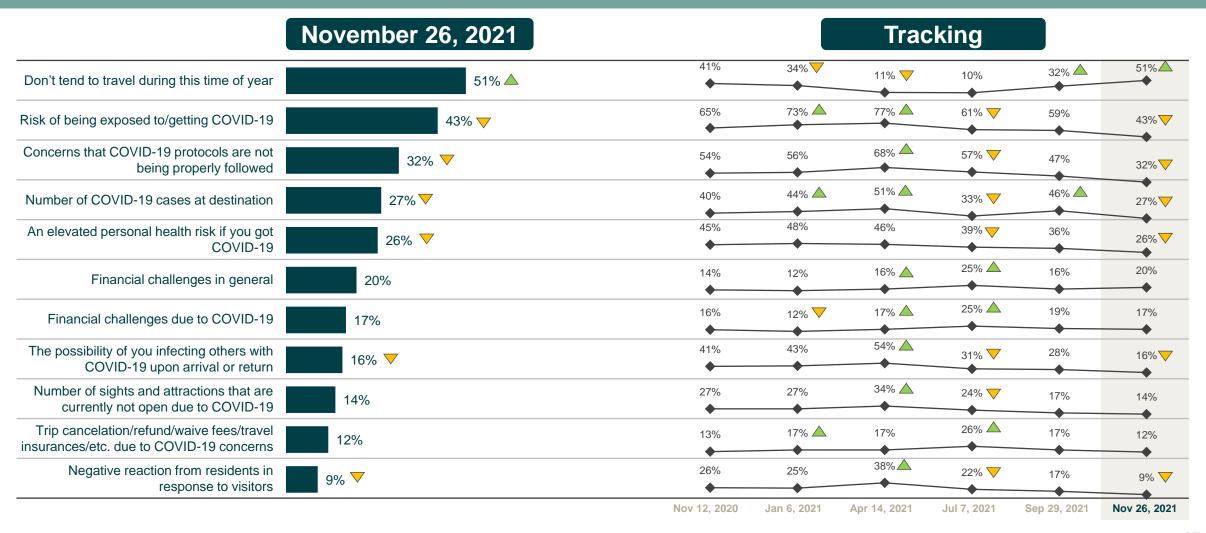
D0. In the following time periods, how many trips, if any, did you take to the following destinations for leisure and/or visiting friends and family? (Please do not consider any trips for business purposes).

Due to rounding, the sum of the individual values shown may not add up to the total shown.

### Reasons For Not Considering Future BC Travel (Aided)



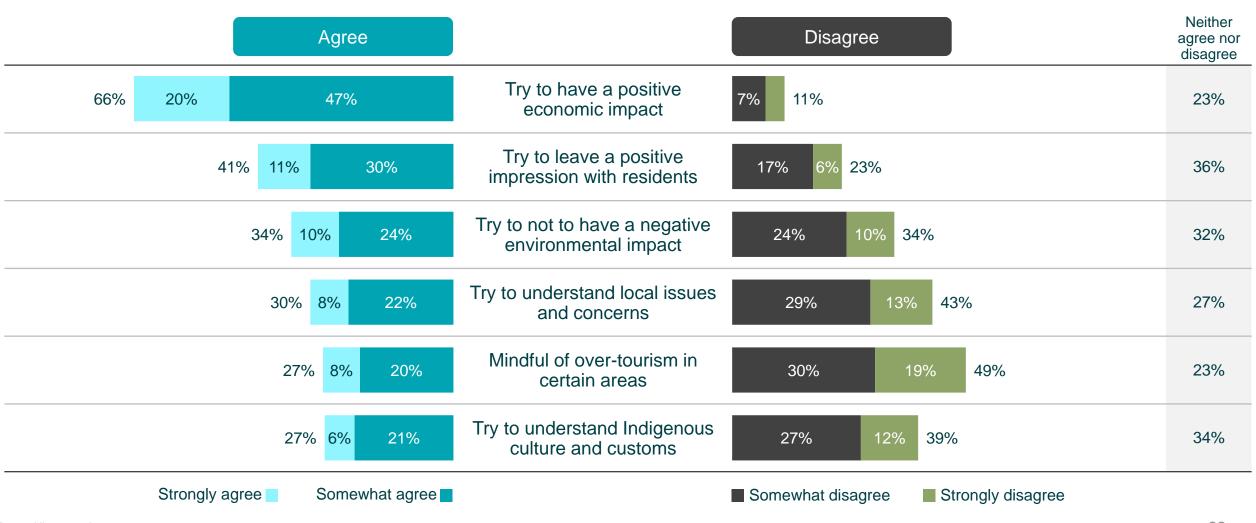
(Among Those Not Intending to Travel in BC in the Next 3 Months)



#### British Columbians' Views On Visitors

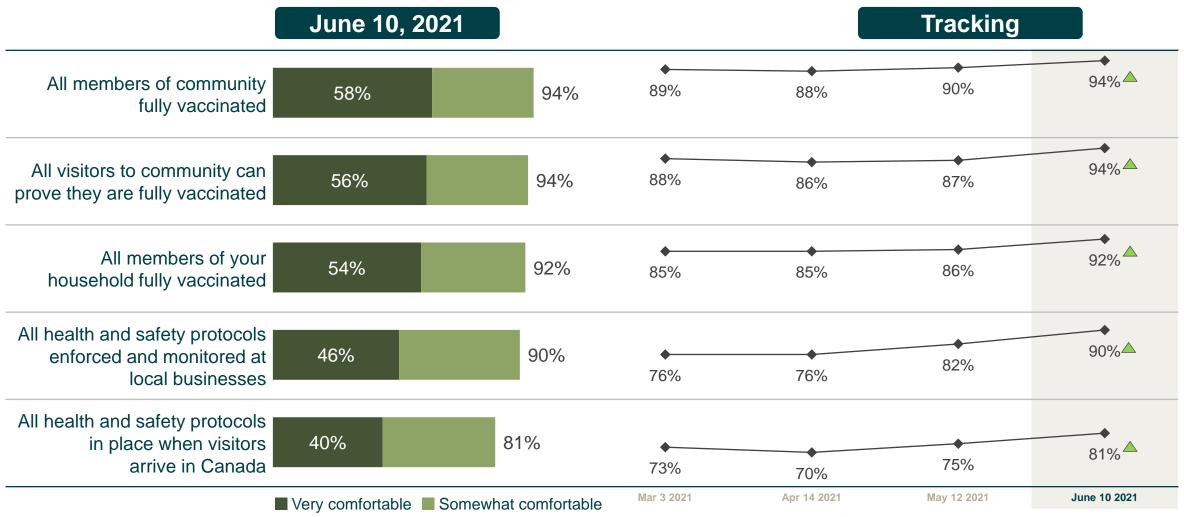


(Wave 32 – August 4, 2021)



### Comfort With Welcoming Visitors Under Various Circumstances

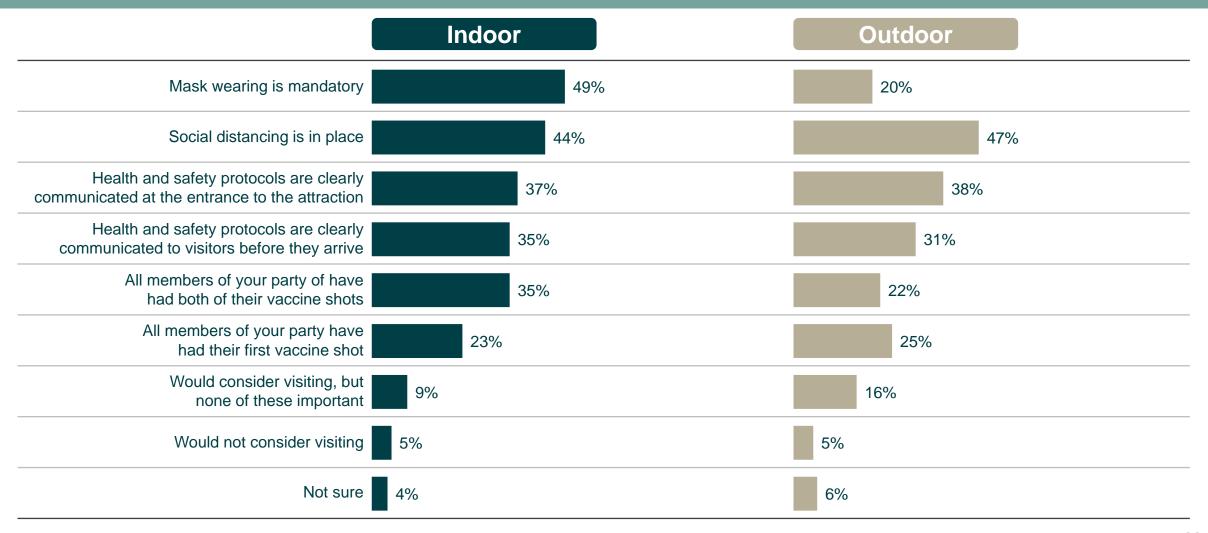




### Important Circumstances In Visiting BC Attractions (Aided)



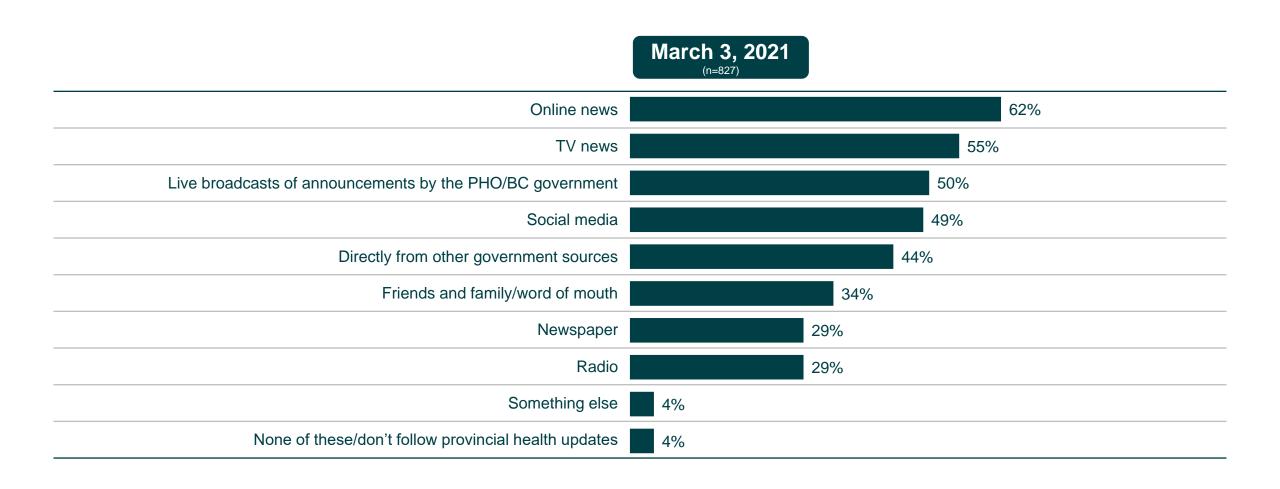
(Wave 29 – June 23, 2021)



### Source Of Provincial COVID-19 Health Updates



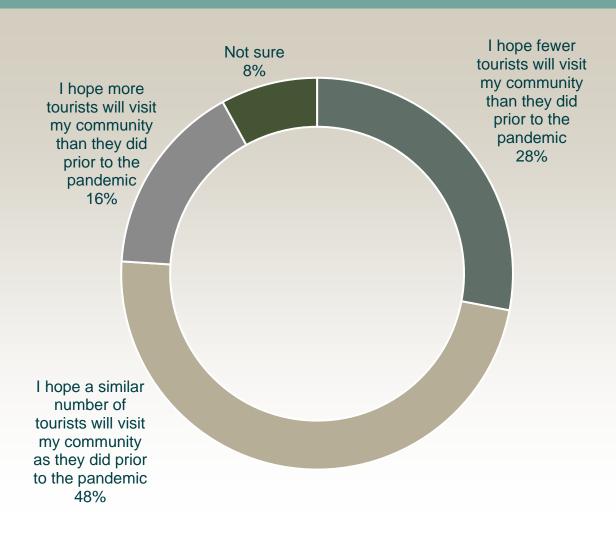
(Wave 21 - March 3, 2021)

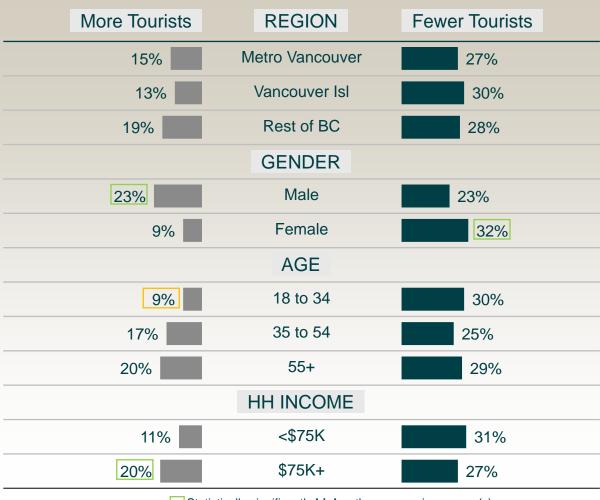


#### Preferred Tourism Post-Pandemic

(Wave 27 – May 26, 2021)







Statistically significantly <a href="https://example.com/higher">higher</a> than comparison group(s).

Statistically significantly **lower** than comparison group(s).



Find this report on <u>Destination BC's COVID-19</u> <u>Research & Insights</u> webpage.

For more information, please contact:

Destination BC's Research & Analytics Team Tourism.Research@DestinationBC.ca

