BC Residents' Public Perceptions: COVID-19 Travel and Tourism Wave 43: February 4, 2022

Report prepared by: Leger

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	14
Current Ad-Hoc Findings	19
APPENDIX: METRICS BY DEMOGRAPHICS	23
APPENDIX: PAST AD-HOC FINDINGS	26

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. The survey moved to monthly fielding starting in January 2022.
- 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

Data Provided by

- 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%
42	Jan 7-9, 2022	999	+/-3.1%
43	Feb 4-6, 2022	1,003	+/-3.1%

KEY HIGHLIGHTS – WHAT'S NEW OR CHANGED



TRAVEL INTENTIONS (SLIDES 6-10)

- Short term (next 4 weeks) travel intentions within BC turned around this wave, with statistically significant increases for intent to travel to nearby communities for a day trip and elsewhere in BC for an overnight trip. Medium term (2-3 months from now) prospects for BC travel also improved significantly as did intent to visit other parts of Canada. This turnaround may be the result of more optimistic messaging from the Provincial Health Officer regarding the approach to COVID-19 as well as the upcoming change in season.
 - Overall, the majority of BC residents plan to travel within the province in 2022, with 83% intending to take day trips and 72% likely to make overnight trips.

CONCERN WELCOMING VISITORS (SLIDES 11-13)

BC residents' concern welcoming visitors also reversed recent trends, with statistically significant decreases in concern welcoming visitors from all markets, especially from other parts of Canada (down -14 points to 53%), overnight visitors from elsewhere in BC (down -13 points each to 37%), and day trippers from nearby communities (down -13 points to 27%).

COMFORT WITH ACTIVITIES/MODES OF TRANSPORTATION (SLIDES 14-18)

- In line with more optimistic travel intentions, comfort with activities, modes of transportation, and accommodations also improved in Wave 43, with increases for all items measured.
 - The largest increases were for indoor tourist attractions (up +13 points to 62%), non-essential car/RV travel (up +12 points to 81%), and non-essential ferry travel (up +11 points to 72%).

KEY HIGHLIGHTS – WHAT'S NEW OR CHANGED



BRITISH COLUMBIANS' CONCERNS WELCOMING CANADIAN VISITORS (SLIDES 19-22)

In line with other results in this wave, BC residents' concern welcoming Canadian visitors dropped significantly for all provinces and regions, especially for those from Atlantic Canada (down -15 points to 47%), the Territories (down -14 points to 43%), and Ontario (down -13 points to 59%). This increase in comfort welcoming visitors is likely in part due to increasing public optimism towards the COVID-19 pandemic.

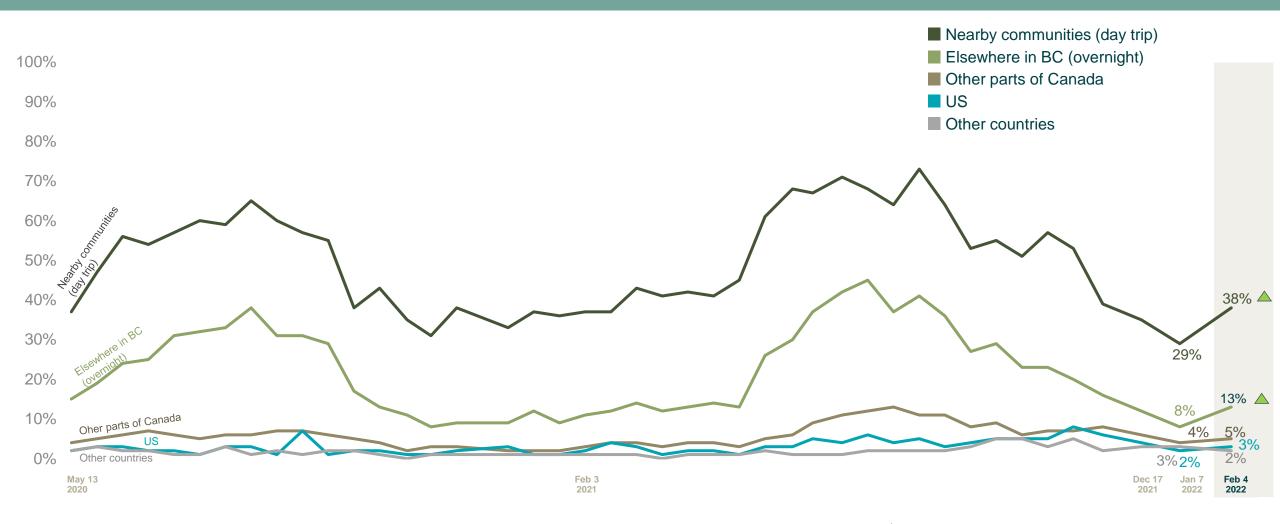


TRAVEL INTENT



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





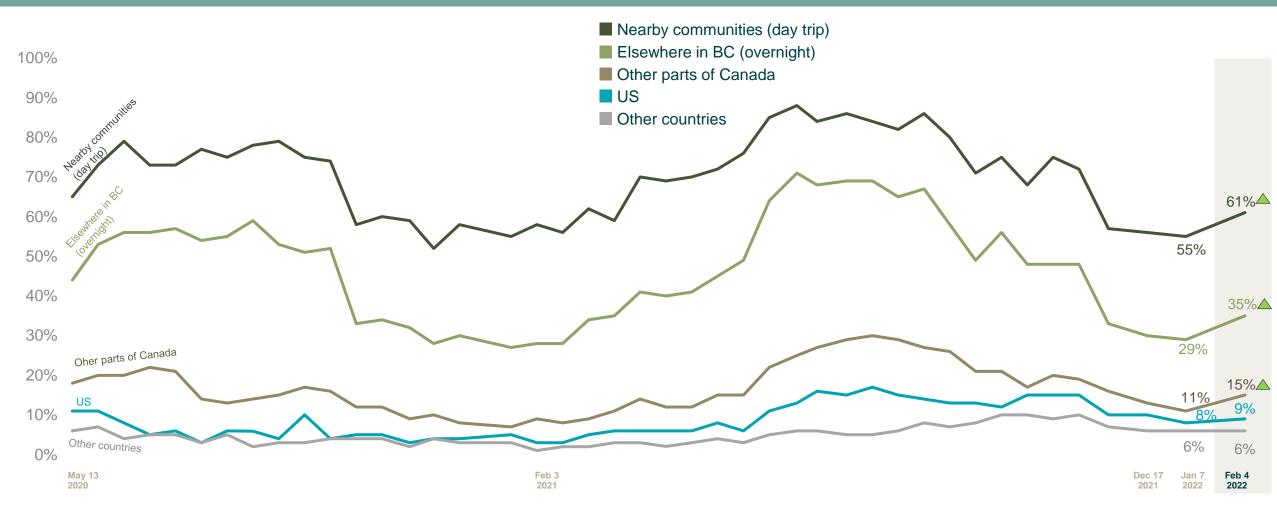
NOTE: Response category "only when vaccine or treatment for COVID-19 available" removed Jun 23, 2021. Base: All respondents D3. When, if at all, are you likely to make trips to the following destinations? Statistically significantly <u>higher</u> than previous wave.

⁷

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



8



NOTE: Response category "only when vaccine or treatment for COVID-19 available" removed Jun 23, 2021. Base: All respondents

D3. When, if at all, are you likely to make trips to the following destinations?

Due to rounding, the total may not equal 100% to the sum of individual values shown.

▲ Statistically significantly <u>higher</u> than previous wave. ▼ Statistically significantly **lower** than previous wave.

Snapshot Of British Columbians' Travel Intentions (Wave 43 – Feb 4, 2022)



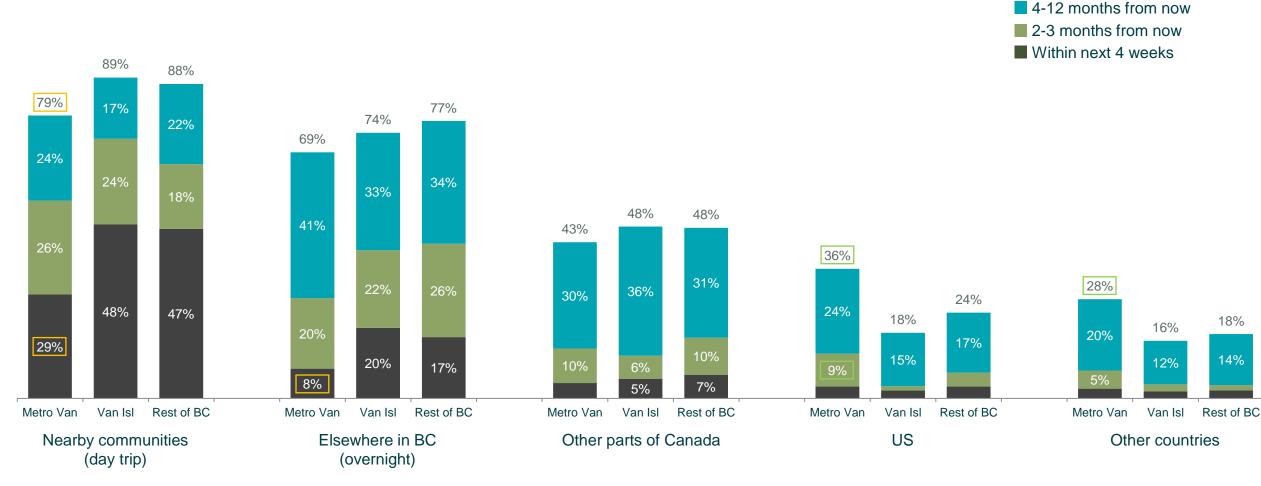
Nearby communities (day trip)		38%			23%		22%	8%	7%
Elsewhere in BC (overnight)	13%	22%			37%		14%	119	6
Other parts of Canada	5% 9%		31%		25%		24	%	5%
US	6%	20%		27%		2	9%	14	4%
Other countries		17%	25%			39%		14	4%
Vithin next 4 weeks 2-3 months from	n now 🗖 4-12	months from now	Within 2 years	s 🔳 No	ot sure, but longer	than 2 years	Only if vaco	cine availabl	e 🔳 Ne

Base: All respondents

D3. When, if at all, are you likely to make trips to the following destinations? Due to rounding, the sum of the individual values shown may not add up to 100%.

9

Snapshot Of British Columbians' Travel Intentions By Region (Wave 43 – Feb 4, 2022)



Base: All respondents D3. When, if at all, are you likely to make trips to the following destinations? Due to rounding, the sum of the individual values shown may not add up to the total shown. Statistically significantly <u>higher</u> than comparison group(s).

10

DESTINATION BRITISH COLUMBIA®

BC



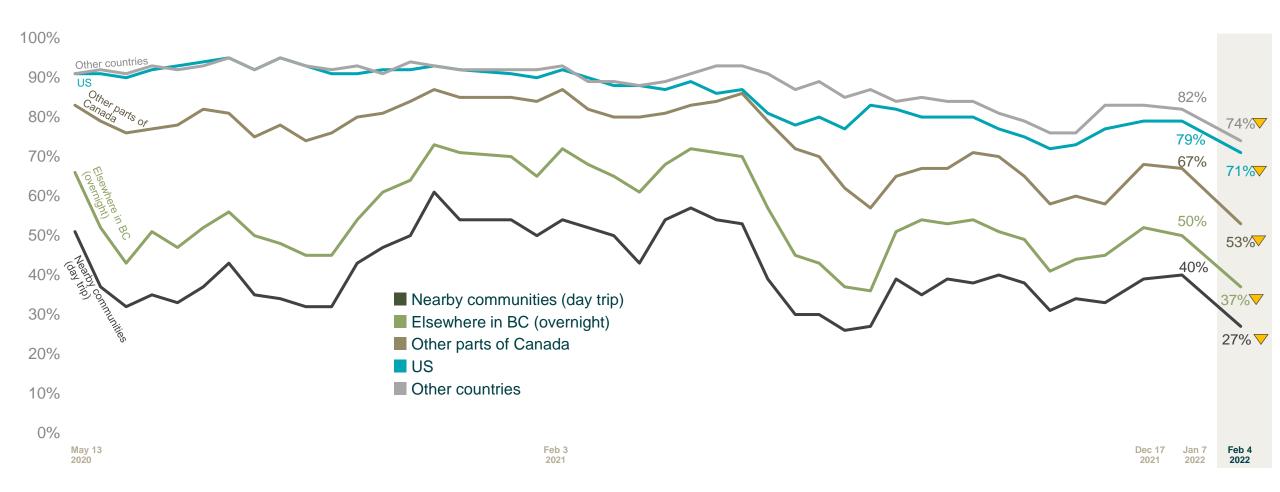
CONCERN WELCOMING VISITORS



Tracking British Columbians' Concern Welcoming Visitors (Total Very/Somewhat Concerned By Visitor Origin)



12



Base: All respondents

D2. Given the current situation with COVID-19, how concerned would you be with the following types of visitors making non-essential trips into your community over the next few weeks?

Snapshot Of British Columbians' Concern Welcoming Visitors (Wave 43 – Feb 4, 2022)



	Not Concerned		Concerned
73% 30%	43%	Nearby communities (day trip)	22% 6% 27%
63% 25%	38%	Elsewhere in BC (overnight)	27% 10% 37%
47%	22% 25%	Other parts of Canada	33% 20% 53%
	29% 15% 14%	US	29% 42% 71%
	26% 13% 13%	Other countries	26% 48% 74%
Not at all concerned	Not very concerned		Somewhat concerned Very concerned

Base: All respondents

D2. Given the current situation with COVID-19, how concerned would you be with the following types of visitors making non-essential trips into your community over the next few weeks? 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? Due to rounding, the sum of the individual values shown may not add up to the total shown.



COMFORT LEVELS BY ACTIVITY / TRANSPORTATION / ACCOMMODATION



Snapshot Of British Columbians' Comfort Levels With Activities, Transportation and Accommodation (Wave 43 – Feb 4, 2022)



		Would	d Feel Comfortable		Would Hold Off
88%	55%		34%	Provincial park	12%
87%	53%		35%	Beach/lake	13%
85%	48%		38%	Non-essential retailer	15%
81%	47%		34%	Car/RV (non-essential)	19%
79%	42%		37%	Outdoor tourist attraction	21%
77%	49%	%	29%	Restaurant	23%
7	72% 39	%	33%	Ferry (non-essential)	28%
	69% 35	5%	34%	Hotel/motel	31%
	62%	28%	35%	Indoor tourist attraction	38%
	57%	27%	30%	Sharing economy accommodations	43%
	4	5% 24	24% 21%	Airplane (non-essential)	55%
		30%	% 15% 15%	Cruise	70%

Definitely would feel comfortable Probably would feel comfortable

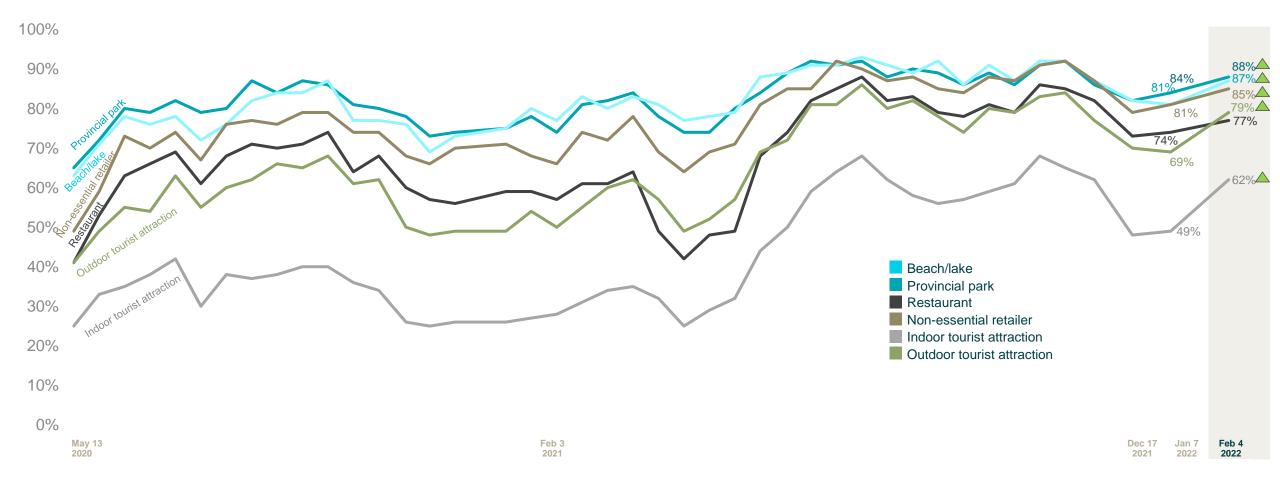
Would hold off longer due to concerns

Base: All respondents, excluding not applicable/don't do this in general and not applicable/wouldn't do this at this time of year D1. Would you be comfortable doing/using each of the following in the next few weeks, or are you be likely to hold off longer due to concerns about COVID-19? Due to rounding, the sum of the individual values shown may not add up to the total shown.

Tracking British Columbians' Comfort Levels With Activities







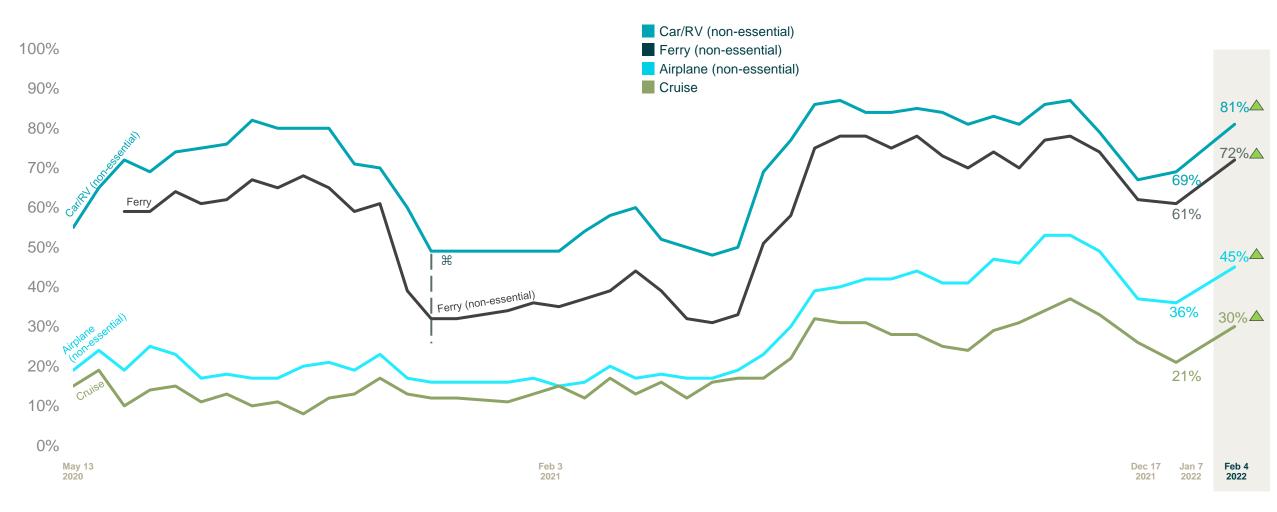
Base: All respondents, excluding not applicable/don't do this in general and not applicable/wouldn't do this at this time of year D1. Would you be comfortable doing/using each of the following in the next few weeks, or are you be likely to hold off longer due to concerns about COVID-19?

▲ Statistically significantly <u>higher</u> than previous wave.
■ Statistically significantly <u>lower</u> than previous wave.

Tracking British Columbians' Comfort Levels With Transportation Modes



(Total Definitely/Probably Would By Transportation)



Base: All respondents, excluding not applicable/don't do this in general and not applicable/wouldn't do this at this time of year

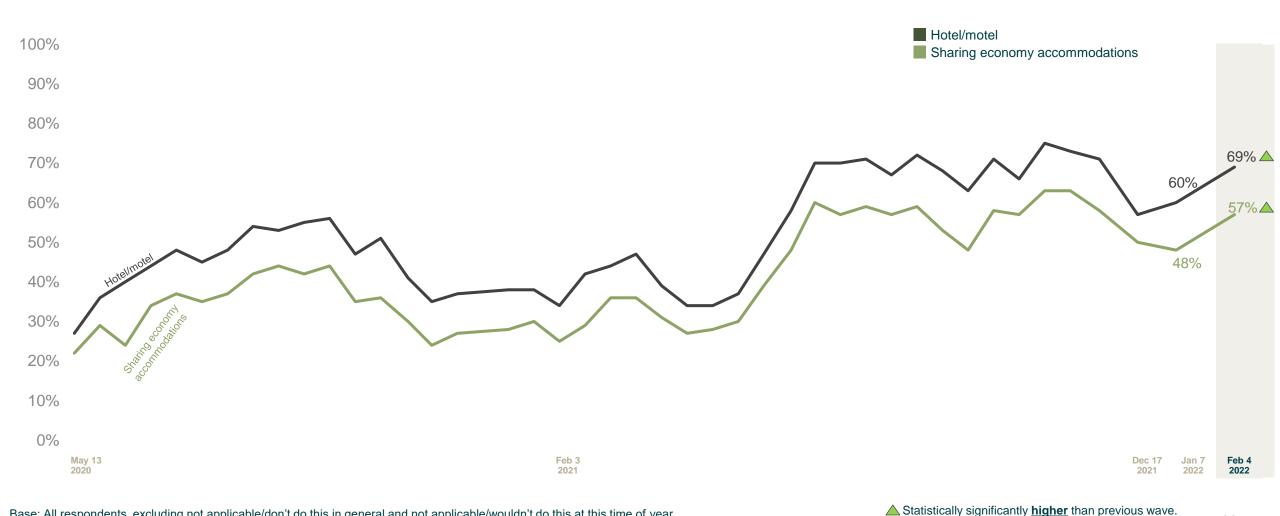
D1. Would you be comfortable doing/using each of the following in the next few weeks, or are you be likely to hold off longer due to concerns about COVID-19?

▲ Statistically significantly <u>higher</u> than previous wave.
T Statistically significantly lower than previous wave.

Tracking British Columbians' Comfort Levels With Accommodation



(Total Definitely/Probably Would By Accommodation Type)



Base: All respondents, excluding not applicable/don't do this in general and not applicable/wouldn't do this at this time of year D1. Would you be comfortable doing/using each of the following in the next few weeks, or are you be likely to hold off longer due to concerns about COVID-19?

Statistically significantly **lower** than previous wave.

18



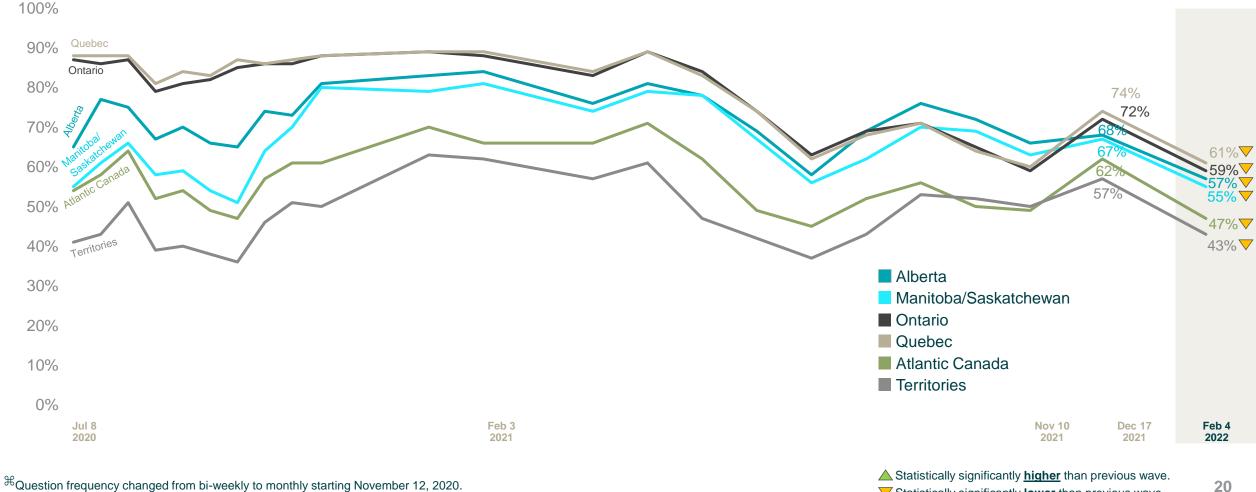
CURRENT AD-HOC FINDINGS



Tracking British Columbians' Concern Welcoming **Canadian Visitors**



(Total Very/Somewhat Concerned By Origin)



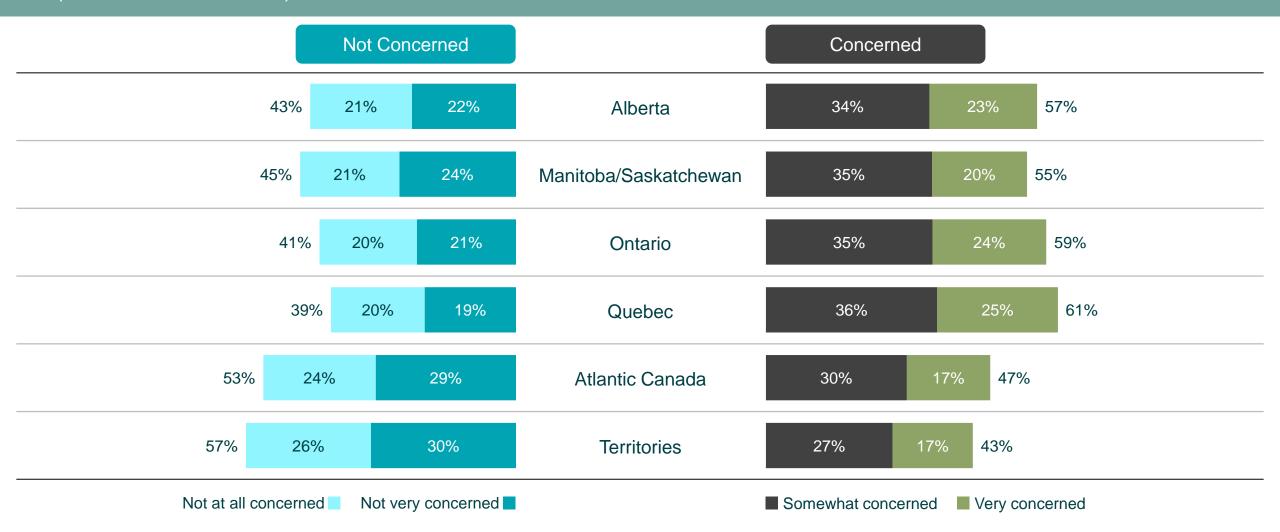
Base: All respondents D2a. And how concerned would you be with the following types of Canadian visitors making non-essential trips into your community over the next few weeks? Statistically significantly **lower** than previous wave.

20

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

(Wave 43 – Feb 4, 2022)





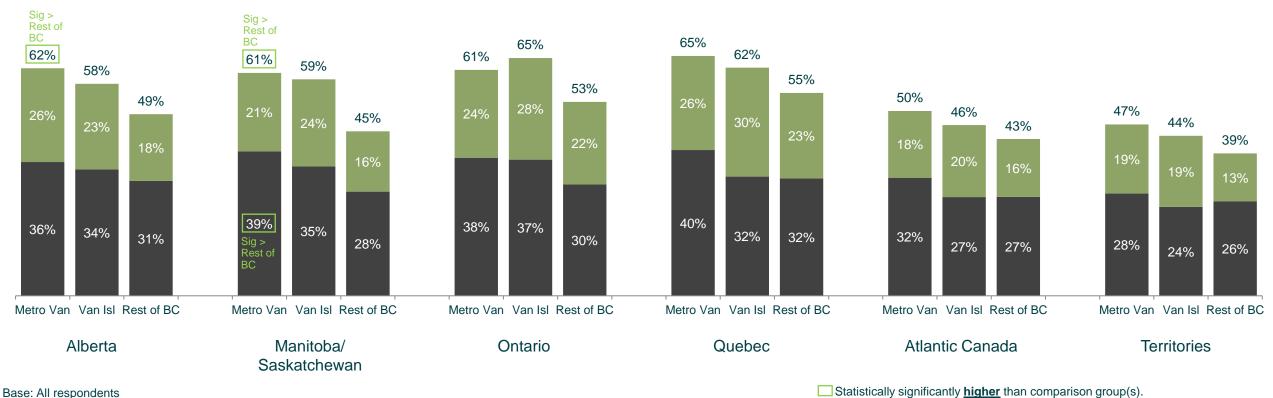
Base: All respondents

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

Snapshot Of British Columbians' Concern Welcoming Canadian Visitors By Region (Wave 43 – Feb 4, 2022)



Very concernedSomewhat concerned



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

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

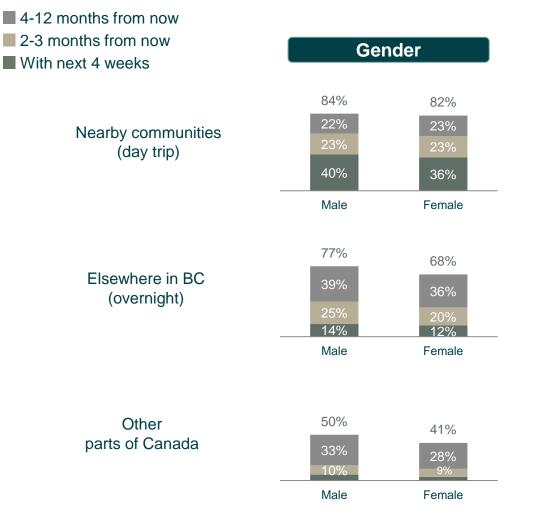


APPENDIX: METRICS BY DEMOGRAPHICS

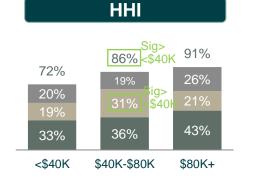


Snapshot Of British Columbians' Travel Intent By Demographics (Wave 43 – Feb 4, 2022)





	Age	
84%	80%	86%
20%	23%	24%
27%	21%	22%
37%	36%	40%
18-34 yrs	35-54 yrs	55 yrs+
75%	73%	70%
75% 41%	73% 35%	70% 37%
41% 19%		
41%	35%	37%





46%	45%	46%
32% 8%	30% 10%	31%
	35-54 yrs	55 yrs+

40%	48%	51%
28% 7%	33% 8%	34% 12%
	\$40K-\$80K	\$80K+

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

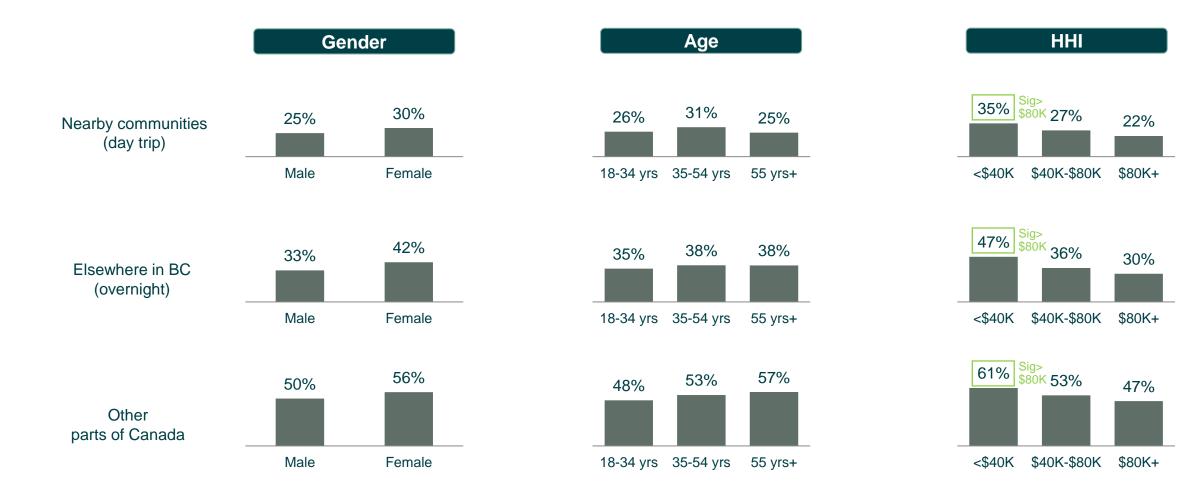
Base: All respondents

D3. When, if at all, are you likely to make trips to the following destinations? Due to rounding, the total may not equal 100% to the sum of individual values shown.

Snapshot Of British Columbians' Concern Welcoming Visitors By Demographics



(Total Very/Somewhat Concerned, Wave 43 – Feb 4, 2022)



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

Base: All respondents

D2. Given the current situation with COVID-19, how concerned would you be with the following types of visitors making non-essential trips into your community over the next few weeks?

25



APPENDIX: PAST AD-HOC FINDINGS







In BC (Overnight Trip)	Other Provinces Outside BC	US	Other Countries
Jan-Mar 2020 16% 8% 31%	7%	10% 16%	7% 9%
Apr-Jun 2020 18% 28%	3%	1%	1%
Jul-Sep 2020 21% 11% 6% 44%	8% 9%	1%	1%
Oct-Dec 2020 16% 25%	5%	2%	1%
Jan-Mar 2021 10% 18%	3%	1%	1%
Apr-Jun 2021 17% 9% 35%	8%	1%	1%
Jul-Sep 2021 23% 14% 6% 10% 53%	12% 17%	4%	4%
Oct-Dec 2021 20% 8% <mark>▼</mark> 34%▼	9%▼ 12%▼	<mark>5%</mark> _6% _	4%

1 trip 2 trips 3 trips 4+ trips

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; Oct-Dec 2021 asked in Wave 42/Jan 7, 2022. 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.

▲ Statistically significantly **higher** than previous wave.

27

Likely 2022 Travel Compared to 2021 (Wave 41 – Jan 7, 2022)



Elsewhere in BC (overnig	ght) 9%		45%		24%	22%
Other parts of Cana	ada 9%		33%	19%		39%
	US 7%	18%	19%		56%	
Other count	ies 6%	17%	18%		59%	
Fewer in 2	2022 than 2021	About the same	e in 2022 as 2021	More in 2022 than 2	2021 Didn't travel here	in 2021, and don't plan to in 2
Il respondents					Statistically significantly higher the	

D14. Compared to last year (2021), how much do you plan to travel this year (2022) to each of the following to destinations for leisure and/or visiting friends and family? (Please do not consider any trips for businesses purposes).

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

Reasons For Not Considering Future BC Travel (Aided)

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

	November 26, 2021			Trac	cking		
Don't tend to travel during this time of year	51% 🛆	41% ◆	34% 🗸	11% 🗸	10%	32%	51%
Risk of being exposed to/getting COVID-19	43% 🔻	65%	73%	77%	61% 🗸	59%	43%
Concerns that COVID-19 protocols are not being properly followed	32% 🔻	54%	56%	68%	57% 💙	47%	32%
Number of COVID-19 cases at destination	27% 🗸	40%	44%	51%	33% 🗸	46%	27%
An elevated personal health risk if you got COVID-19	26% 🔻	45%	48%	46%	39% 🔻	36%	26%
Financial challenges in general	20%	14%	12%	16% 🔺	25%	16%	20%
Financial challenges due to COVID-19	17%	16%	12% 🗸	17% 🛆	25% 🔺	19%	17%
The possibility of you infecting others with COVID-19 upon arrival or return	16% 🔻	41%	43%	54%	31% 🗸	28%	16% 🗸
Number of sights and attractions that are currently not open due to COVID-19	14%	27%	27%	34% 🛆	24% 💙	17%	14%
Trip cancelation/refund/waive fees/travel insurances/etc. due to COVID-19 concerns	12%	13%	17%	17%	26%	17%	12%
Negative reaction from residents in response to visitors	9% 🗸	26%	25%	38%	22% 💙	17%	9% 🗸
		Nov 12, 2020	Jan 6, 2021	Apr 14, 2021	Jul 7, 2021	Sep 29, 2021	Nov 26, 2021

Base: Those who are not likely to take a daytrip in BC or an overnight trip in BC in the next 3 months D4. Why are you **not** likely to travel in BC for a day trip or an overnight trip in the next 3 months?

29

DESTINATION BRITISH COLUMBIA®

BC

British Columbians' Views On Visitors (Wave 32 – August 4, 2021)



Agree	Disagree	Neither agree nor disagree
66% 20% 47%	Try to have a positive economic impact 7% 11%	23%
41% 11% 30%	Try to leave a positive 17% 6% 23%	36%
34% 10% 24%	Try to not to have a negative 24% 10% 34%	32%
30% 8% 22%	Try to understand local issues 29% 13% 43%	27%
27% 8% 20%	Mindful of over-tourism in certain areas 30% 19% 49%	23%
27% 6% 21%	Try to understand Indigenous culture and customs 27% 12% 39%	34%
Strongly agree Somewhat agree	Somewhat disagree Strongly disagree	

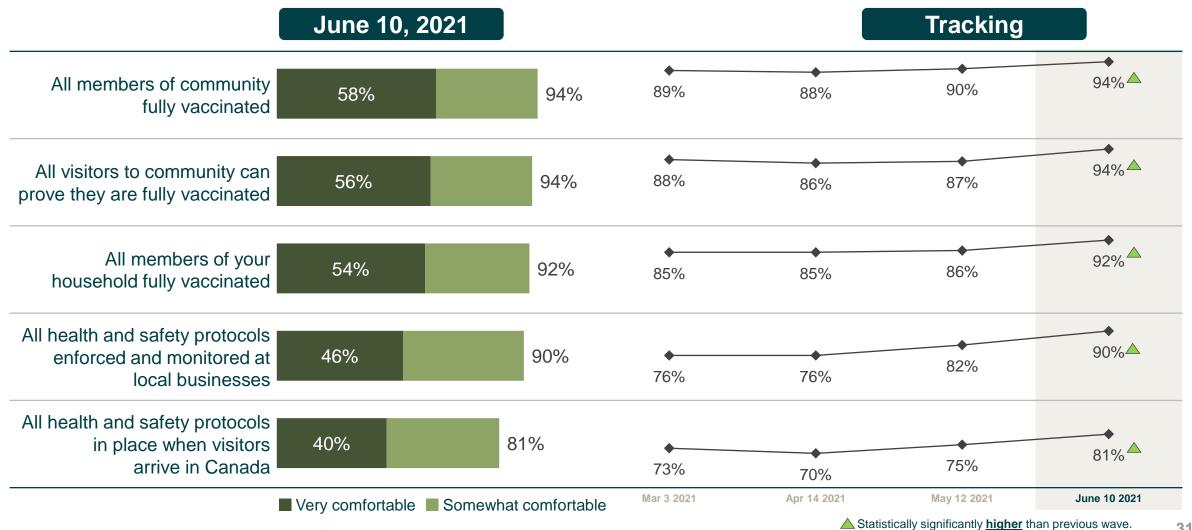
Base: All respondents

D11. How much do you agree or disagree with each of the following statements?

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

Comfort With Welcoming Visitors Under Various Circumstances





Base: All respondents

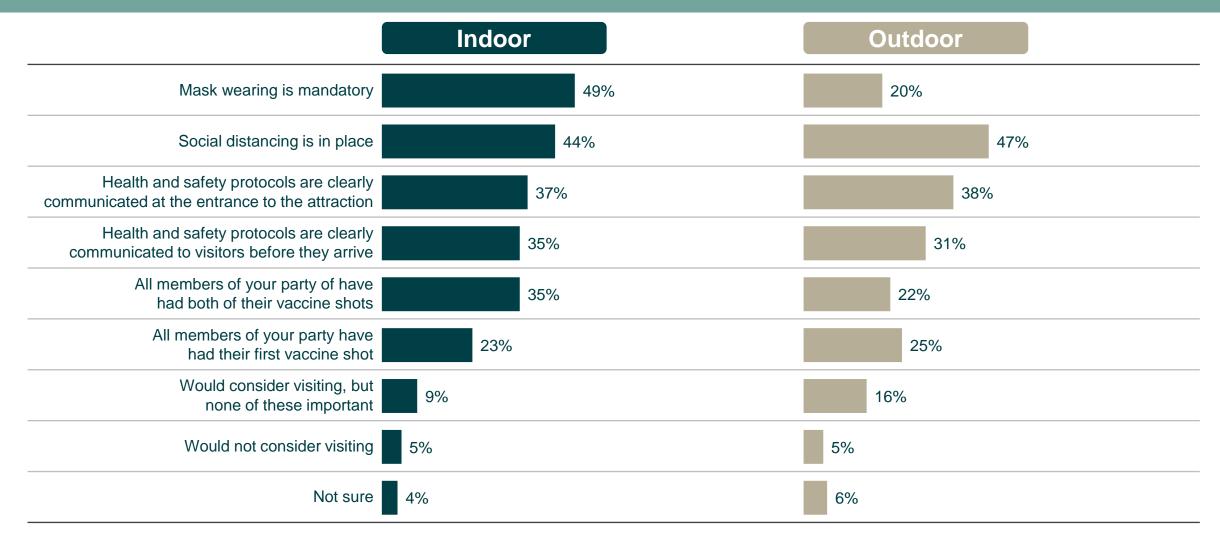
D5. How comfortable would you be with visitors making non-essential trips into your community under each of the following circumstances?

31

Statistically significantly **lower** than previous wave.

Important Circumstances In Visiting BC Attractions (Aided) (Wave 29 – June 23, 2021)





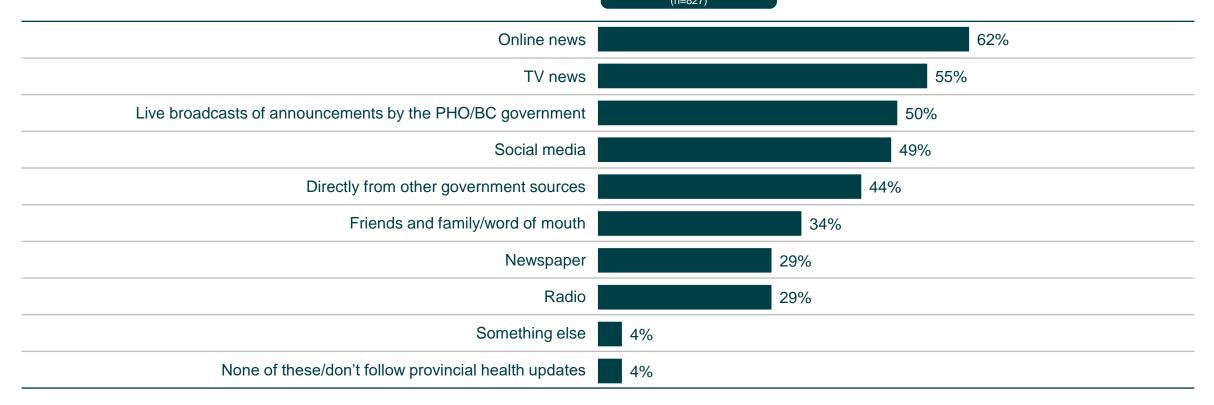
Base: All respondents

D10. If you were considering visiting a tourist attraction in BC in the next few weeks, which of the following, if any, would be important to you in deciding whether to visit or not?

Source Of Provincial COVID-19 Health Updates (Wave 21 - March 3, 2021)



March 3, 2021

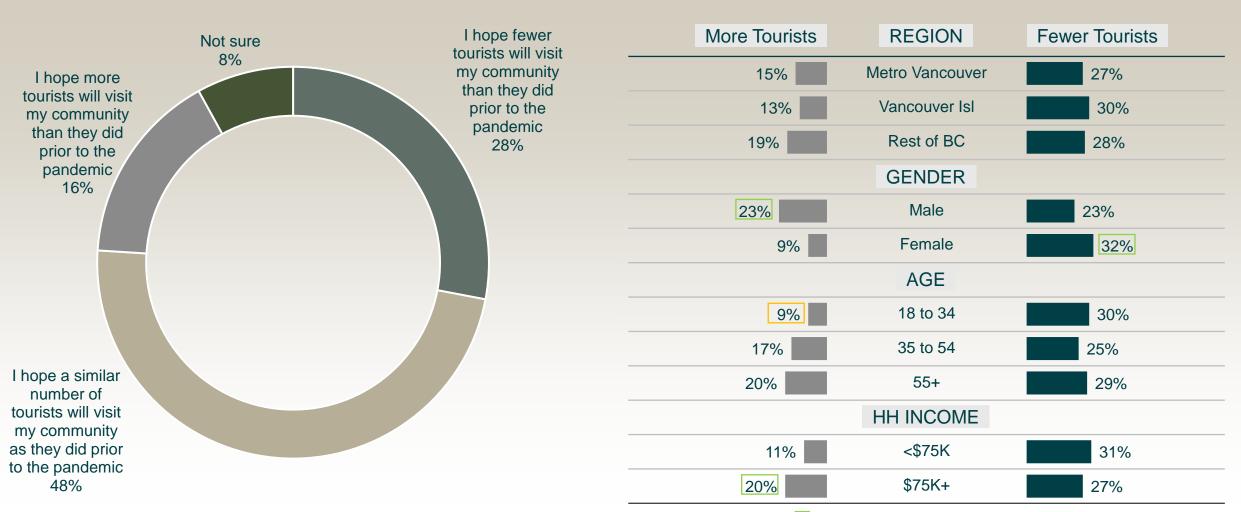


Base: All respondents D6. Which of the following information sources do you use on a weekly basis or more often to learn about provincial health updates regarding COVID-19?

Preferred Tourism Post-Pandemic

(Wave 27 – May 26, 2021)





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

Statistically significantly lower than comparison group(s).

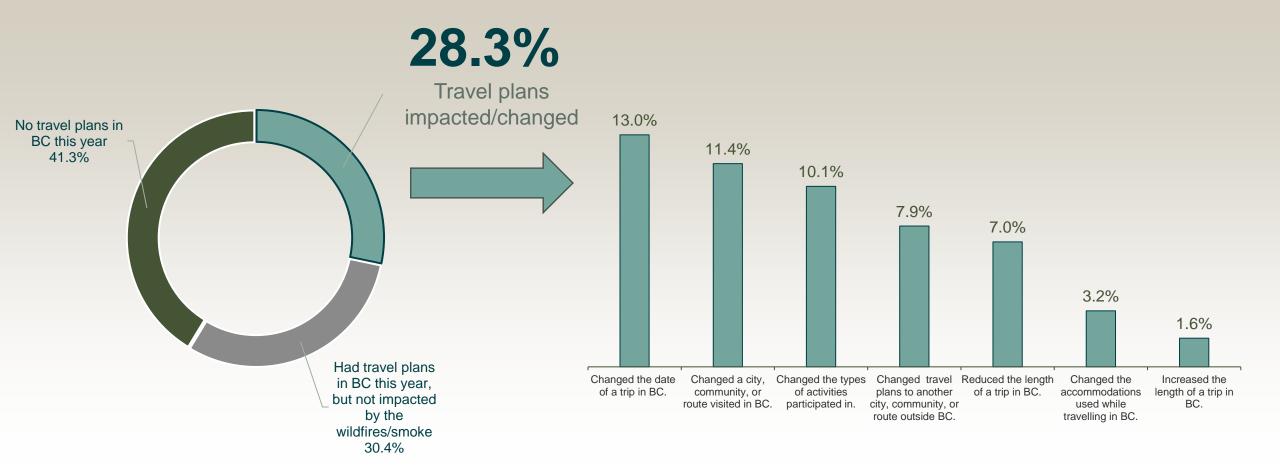
34

Base: All respondents

D9. When travel is allowed, and assuming both your community and incoming visitors are fully vaccinated and visitors meet Health Canada's safety guidelines, which of the following statements do you most agree with?

Impact Of Wildfires/Smoke On Residents' BC Travel Plans (Wave 34 – Sept 1, 2021)







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

