

BC Residents' Public Perceptions: COVID-19 Travel and Tourism Wave 47: June 15, 2022

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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

- 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%
44	Mar 4-6, 2022	1,000	+/-3.1%
45	Apr 8-10, 2022	1,003	+/-3.1%
	May 6-8, 2022	1,003	+/-3.1%
46	Way 0-0, 2022		

KEY HIGHLIGHTS – WHAT'S NEW OR CHANGED



TRAVEL INTENTIONS (SLIDES 7-10)

- BC residents' short term (next 4 weeks) travel prospects within BC continue to increase (up +7 points for day trips and up +4 points for overnight trips). Medium term (within 2-3 months) travel intentions are also increasing with a +5 point increase for overnight and a directional increase for day trips. However, compared to June 2021, BC residents' travel intentions for both day trips and overnight within BC are down for both short and medium term, perhaps as a result of increased out-of-province travel.
- Short term (next 4 weeks) prospects for travel to other parts of Canada is up +3 points but only increasing directionally in the next 2-3 months. Both short and medium term travel intentions to other provinces is higher when compared to this same time last year.
- Similar to May, travel intentions to destinations outside of Canada have not significantly changed in the past month, but remain directionally above levels at this point last year.

CONCERN WELCOMING VISITORS (SLIDES 12-13)

BC residents' concern welcoming visitors continues to drop to historic study lows, particularly for overnight BC visitors, a decrease of -5 points to 23%.

COMFORT WITH ACTIVITIES/MODES OF TRANSPORTATION (SLIDES 15-18)

- With COVID-19 regulations continuing to be removed, comfort with all activities is still on a upward trajectory, especially for indoor and outdoor tourist attractions (increase of +4 and +5 points, respectively) and cruise ship (+7) and car travel (+3).
- Comfort levels with all activities and modes of transportation have increased again to new historical study highs.

KEY HIGHLIGHTS – WHAT'S NEW OR CHANGED



BRITISH COLUMBIANS' CONCERNS WELCOMING CANADIAN VISITORS (SLIDES 20-22)

 BC residents' concern welcoming Canadian visitors continues to decrease significantly for all provinces and regions, especially for those from Atlantic Canada (a decrease of -10 points to 30%), and Alberta and Ontario (decreases of -9 points to 38% and 39%, respectively). The level of concern has decreased to record study lows for all provinces/territories.

IMPACT OF FACTORS ON OVERNIGHT TRAVEL IN BC THIS SUMMER (SLIDE 23)

When asked how much impact each of six factors will have on overnight travel plans in BC this Summer, BC residents feel transportation/gas costs will affect them the most (62% rating it 4 or 5 on a 5-point scale, where 5 is greatly impacted), followed by financial situation (43%), then potential natural weather events (41%). Surprisingly, the impact of COVID-19 is well-below these factors, with 28% of BC residents rating it 4 out of 5, or higher, in terms of affecting their summer travel plans.

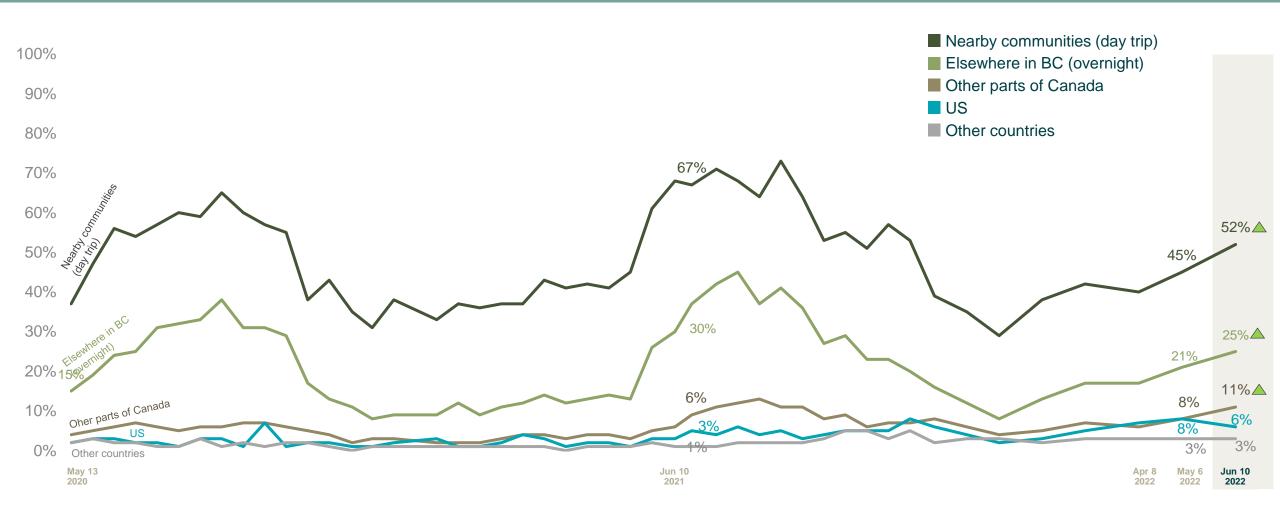


TRAVEL INTENT



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





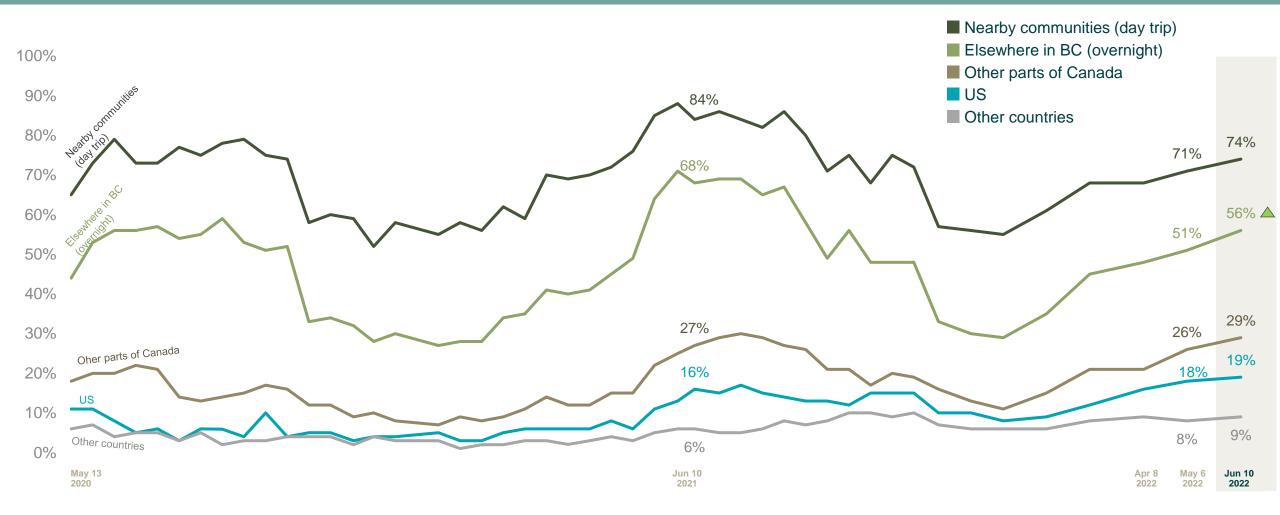
NOTE: Response category "only when vaccine or treatment for COVID-19 available" removed Jun 23, 2021. Base: All respondents D3. When, if at all, are you likely to make trips to the following destinations? Statistically significantly <u>higher</u> than previous wave.

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 **<u>lower</u>** than previous wave.

Snapshot Of British Columbians' Travel Intentions (Wave 47 – June 10, 2022)



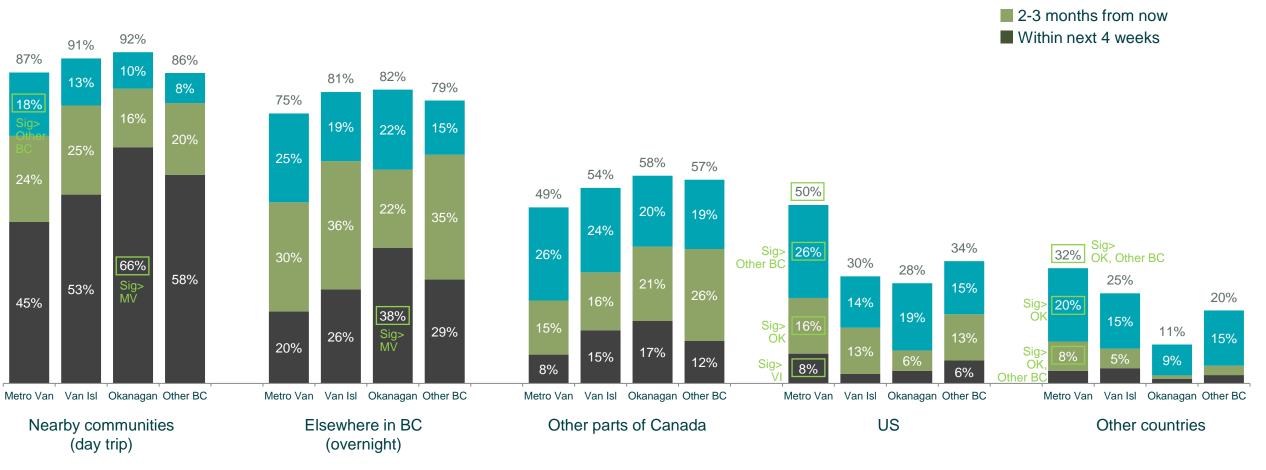
Nearby communities (day trip)		5	2%		22%	14%	5%
Elsewhere in BC (overnight)		25%	31	%	22%	11%	8%
Other parts of Canada	11%	18%	24	%	26%	17	′%
US	6%	13%	21%	24%		24%	12%
Other countries	6%	17%	28%	6	34%		12%

Within next 4 weeks 2-3 months from now 4-12 months from now Within 2 years Not sure, but longer than 2 years Never

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%.

Snapshot Of British Columbians' Travel Intentions By Region (Wave 47 – June 10, 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. 10

DESTINATION BRITISH COLUMBIA®

BĆ

4-12 months from now



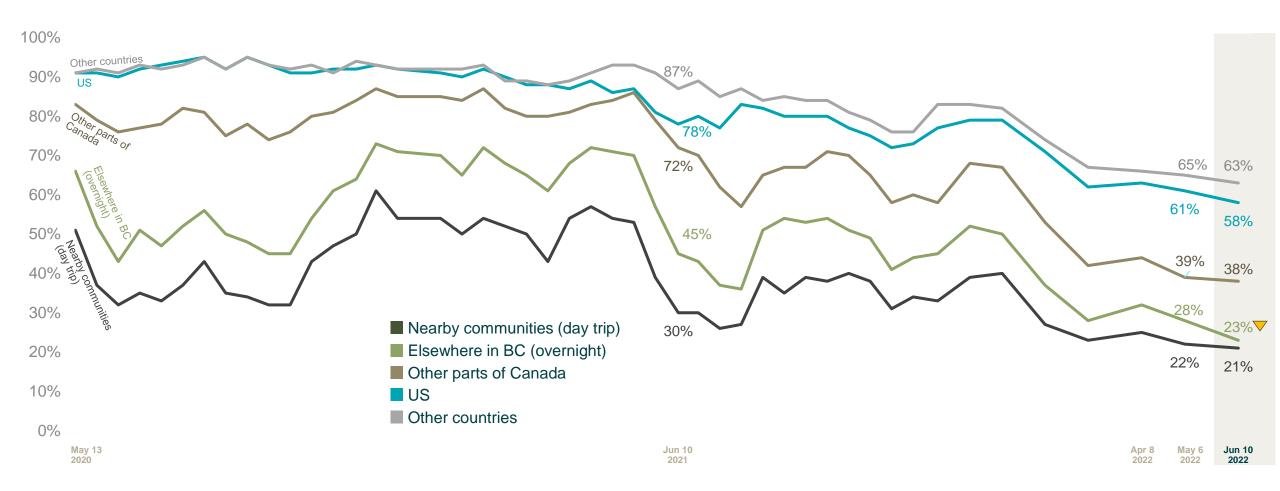
CONCERN WELCOMING VISITORS



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



12



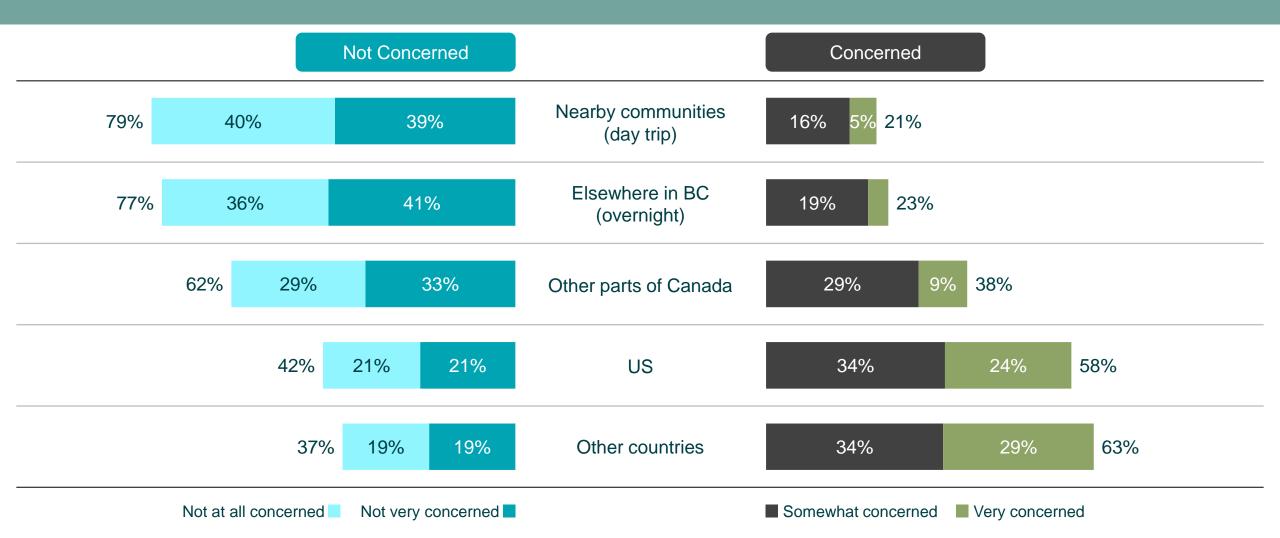
Statistically significantly <u>higher</u> than previous wave. Statistically significantly **lower** than previous wave.

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 47 – June 10, 2022)





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? 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 47 – June 10, 2022)



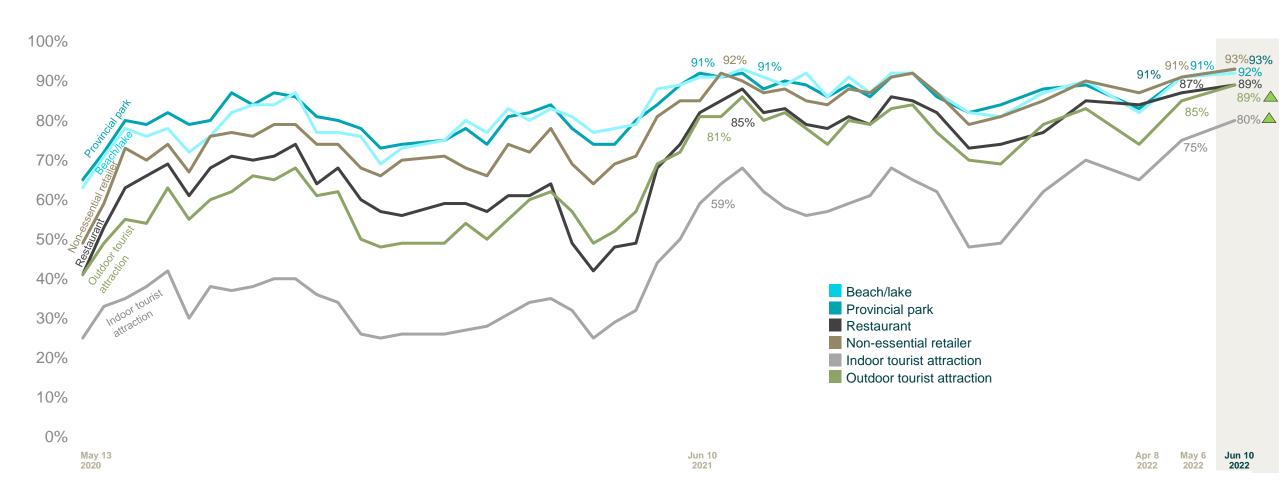
		W	ould Fe	el Comfortable		Would Hold Off	
93%	(61%		32%	Provincial park	7%	
93%	5	58%		35%	Non-essential retailer	7%	
92%		64%		28%	Beach/lake	8%	
91%		60%		31%	Car/RV (non-essential)	9%	
89%		62%		28%	Restaurant	11%	
89%		56%		34%	Outdoor tourist attraction	11%	
86%		52%		33%	Ferry (non-essential)	14%	
83%		49%		34%	Hotel/motel	17%	
80%	%	40%		40%	Indoor tourist attraction	20%	
	70%	33%		37%	Sharing economy accommodations	30%	
	67%	37%		30%	Airplane (non-essential)	33%	
		47%	26%	21%	Cruise	53%	
Definitely would fe	Definitely would feel comfortable Probably would feel comfortable						

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 (Total Definitely/Probably Would By Activity)





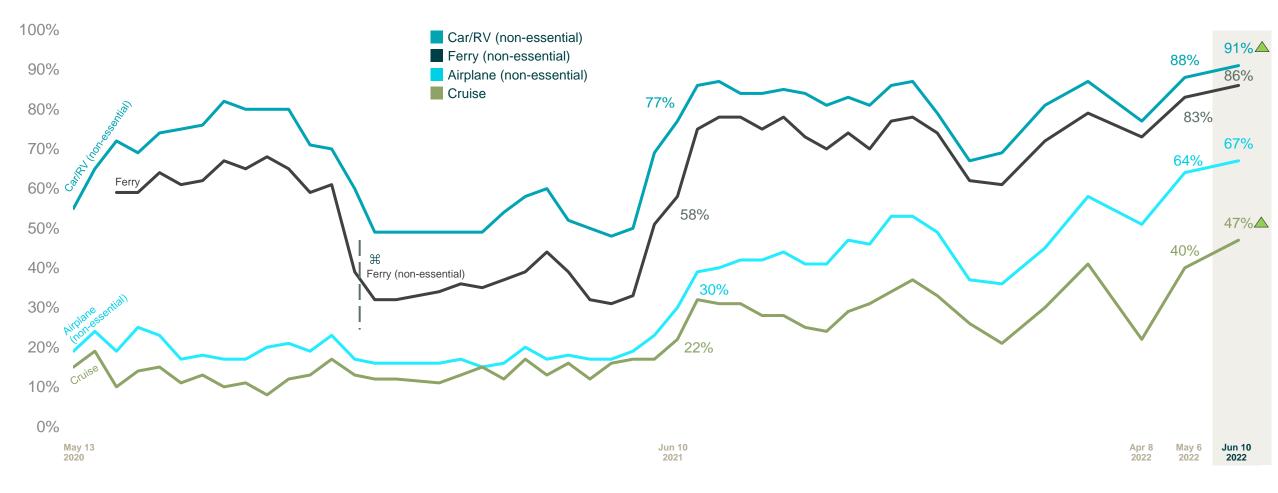
Base: All respondents, excluding not applicable/don't do this in general and not applicable/wouldn't do this at this time of year D1. Would you be comfortable doing/using each of the following in the next few weeks, or are you be likely to hold off longer due to concerns about COVID-19?

▲ 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)



ℜ Changed from "ferry" to "ferry for non-essential travel" November 12, 2020 wave.

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

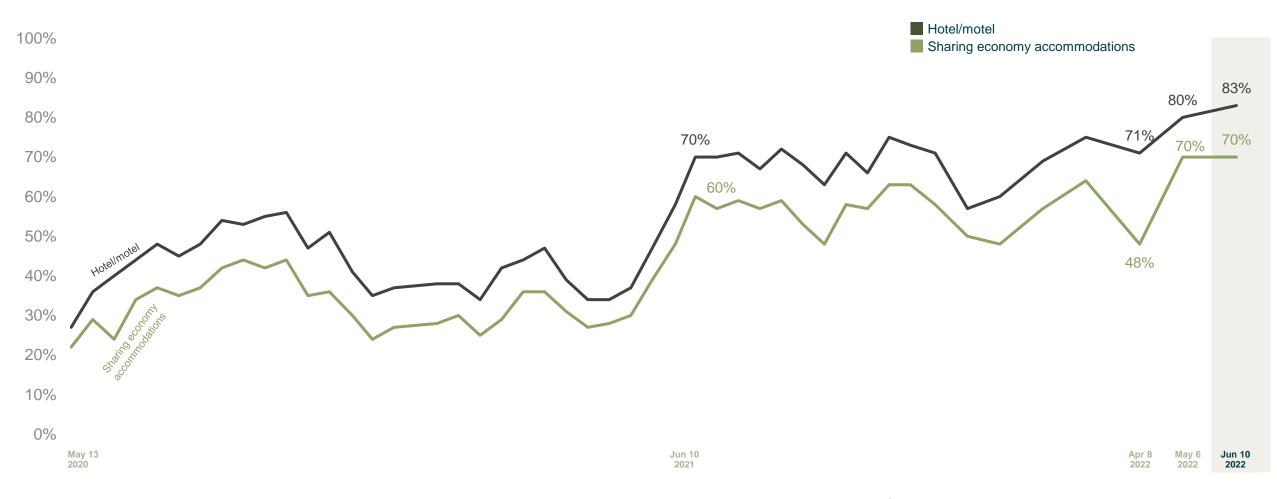
D1. Would you be comfortable doing/using each of the following in the next few weeks, or are you be likely to hold off longer due to concerns about COVID-19?

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

18



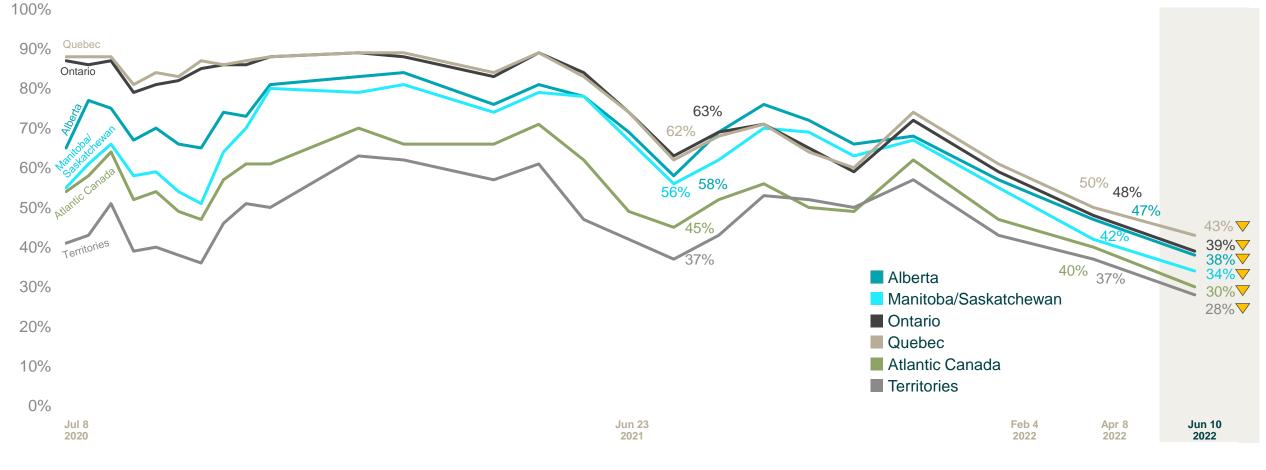
CURRENT AD-HOC FINDINGS



Tracking British Columbians' Concern Welcoming Canadian Visitors



(Total Very/Somewhat Concerned By Origin)



[#]Question frequency changed from bi-weekly to monthly starting November 12, 2020.

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 <u>higher</u> than previous wave.

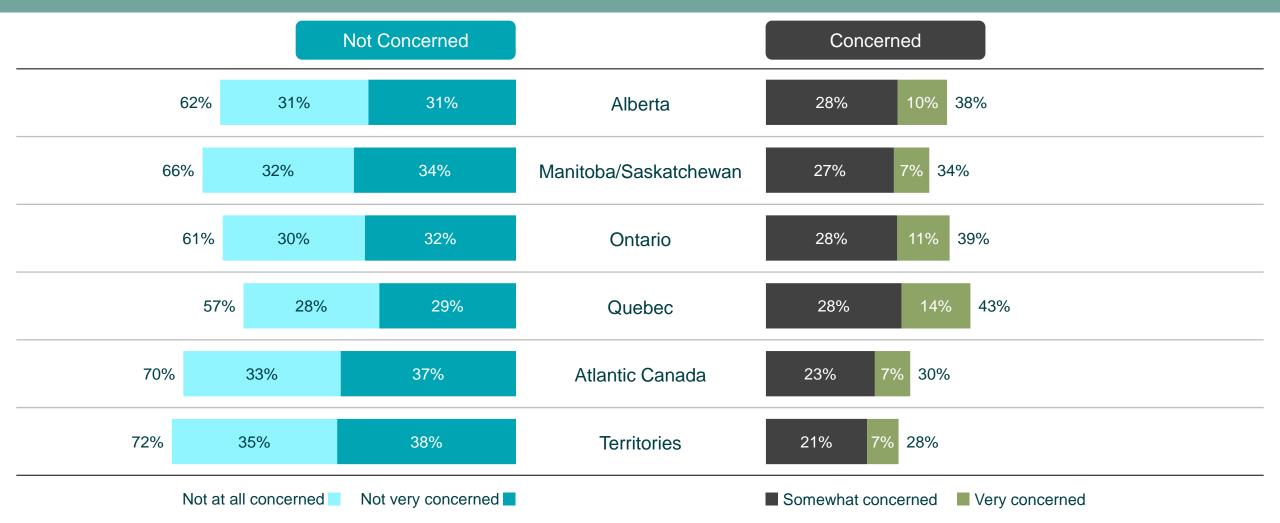
Statistically significantly **lower** than previous wave.

20

Snapshot Of British Columbians' Concern Welcoming Canadian Visitors

(Wave 47 – June 10, 2022)





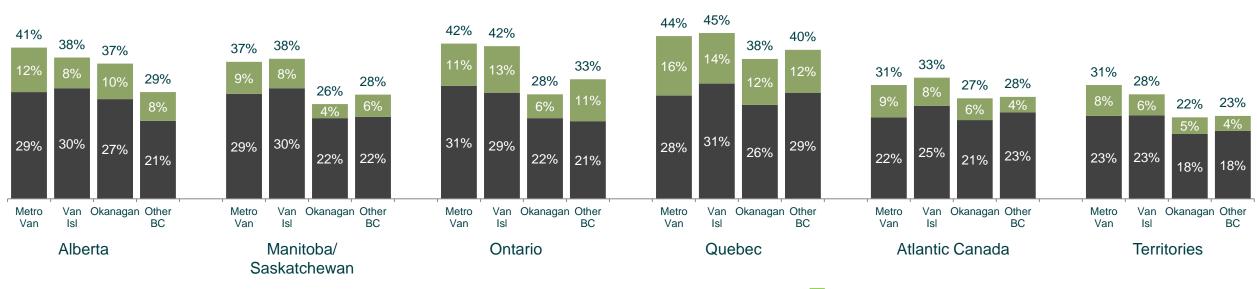
Base: All respondents

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 47 – June 10, 2022)



Very concernedSomewhat concerned



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.

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

Statistically significantly lower than comparison group(s).

Impact of Factors on Overnight Travel in BC this Summer (Wave 47 – June 10, 2022)



% 26% 32% 21%	22%	21% 5 15%
	26%	5 15%
21%		
21/0	24%	16% 12%
16%	33%	17% 7%
19%	35%	15% 6%
	19%	

Base: All respondents

ADHOC JUN_D4r1:. What level of impact will each of the following factors have on your overnight travel plans in British Columbia this summer?



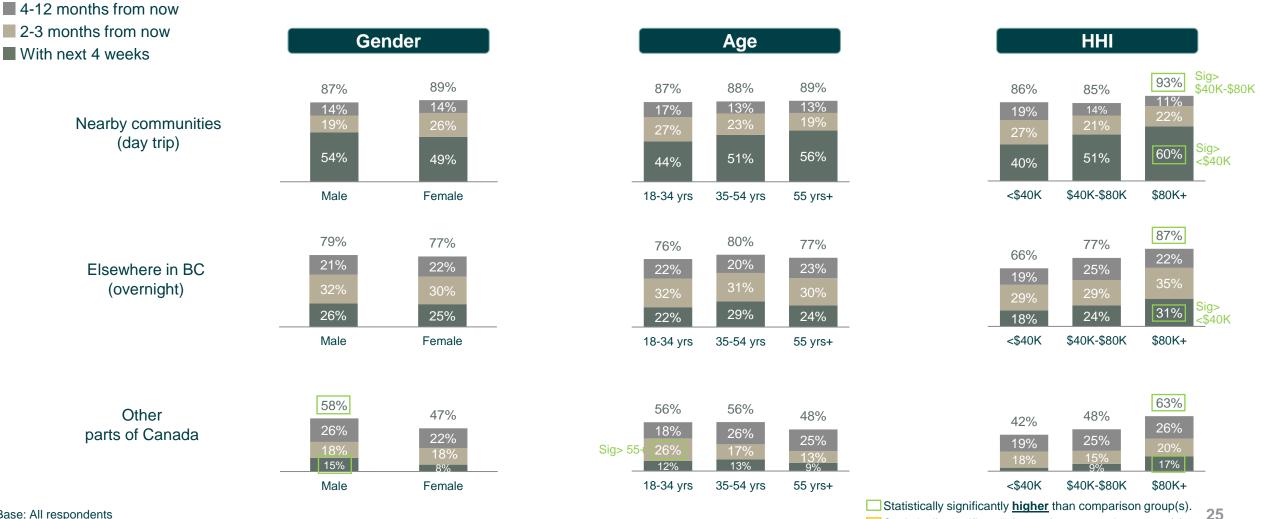
APPENDIX: METRICS BY DEMOGRAPHICS



Snapshot Of British Columbians' Travel Intent By Demographics (Wave 47 – June 10, 2022)



Statistically significantly lower than comparison group(s).



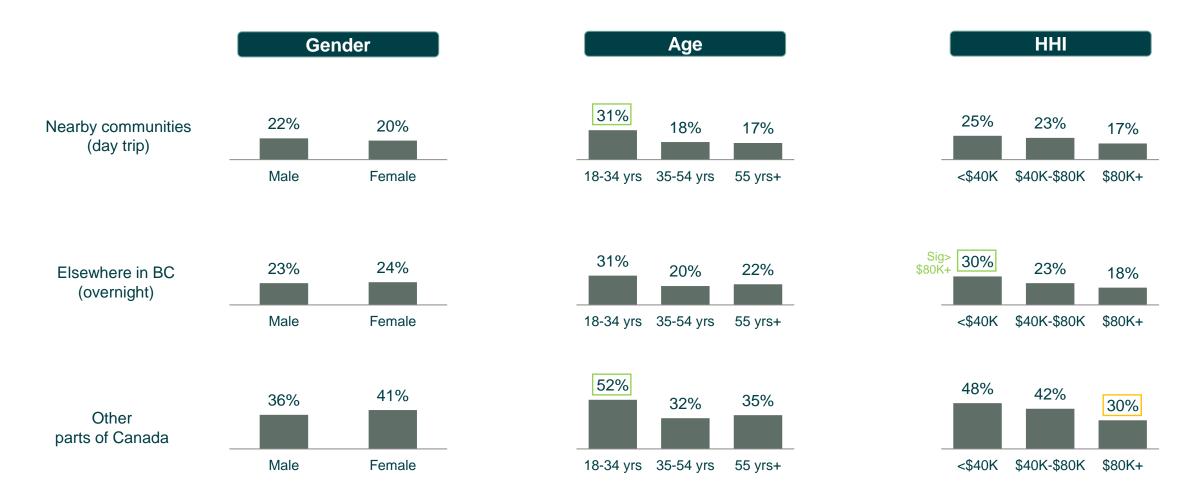
Base: All respondents

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 47 – June 10, 2022)



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?

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

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APPENDIX: PAST AD-HOC FINDINGS



Importance of Tourism (Wave 45 – Apr 8, 2022)



The tourism industry plays an important role in British Columbia's economic recovery from the COVID-19 pandemic		39%			45%		15%
Tourism supports a greater diversity of amenities than would otherwise exist in my community	33%		46%			19%	
Tourism plays a positive role in preserving, sharing, and celebrating the culture and history of my community	;	32%		44%		20	0%
Residents are involved and play a role in influencing the planning and development of tourism in my community	20%		39%		28%		11%
The overall attractiveness of the tourism industry as an employer is positive compared to other industries	10%	27%			51%		9%
The tourism industry offers higher wages compared to other industries	8% 1	5%	51%)		22%	0
	Strongly agree	Somewhat agree	e Neither agre	e nor disag	ree Somewhat o	disagree	Strongly disag

Base: All respondents

ADHOC APR_A. Please indicate your level of agreement for each of the following statements.

Impact of Gas Prices on Spring/Summer Travel Intentions (Wave 45 – Apr 8, 2022)



Nearby communities (day trip)	37	7%	48%	10%
Elsewhere in BC (overnight)	34%		16%	
Other parts of Canada	25%	33	3%	38%
US	18%	31%	6%	45%
Other countries	15%	29%	6%	50%
	Fewer trips	Same number of trips	More trips	Don't plan to travel here

Base: All respondents

ADHOC APR_B. How will the rising price of gas/fuel impact the number of trips you take to the following destinations this Spring/Summer?

Past Travel



In BC (Overnight Trip)	Other Provinces Outside BC	US	Other Countries
Jan-Mar 2020 16% 8% 31%	5 7%	10%	7% 9%
Apr-Jun 2020 18% 5 28%	3%	1%	1%
Jul-Sep 2020 21% 11% 6% 5 44%	8% 9%	1%	1%
Oct-Dec 2020 16% 5 25%	5%	2%	1%
Jan-Mar 2021 10% 18%	3%	1%	1%
Apr-Jun 2021 17% 9% 35%	5 8%	1%	1%
Jul-Sep 2021 23% 14% <mark>6% 10%</mark> 53%	12% 17%	4%	4%
Oct-Dec 2021 20% 8% <mark>▼</mark> 34%▼	9%▼ 12%▼	<mark>5%</mark> ▲ 6% ▲	4%
Jan-Mar 2022 18% 5% 29% 🗸	<mark>6%</mark> ▼ 8%▼	6% 8%	6% 6%▲
	1 trip 2 trips 3 t	rips 📃 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; Jan-Mar 2022 asked in Wave 45/Apr 8, 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).

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

30

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)

	March 4, 2022				Track	ing			
Risk of being exposed to/getting COVID-19	38%	65% •	73%	77%	61% 🗸	59%	43% 🗸	44%	38%
Don't tend to travel during this time of year	27%	41%	34%	11% 💙	10%	32%	51%	36%	27%
Concerns that COVID-19 protocols are not being properly followed	26%	54% •	56%	68%	57% 🗸	47%	32% 🗸	33%	26% 🥄
Financial challenges in general	22%	14%	12%	16%	25%	16%	20%	20%	22%
Financial challenges due to COVID-19	20%	16%	12% 🗸	17%	25% 🛆	19%	17%	19%	20%
An elevated personal health risk if you got COVID-19	19%	45% •	48%	46%	39% 💙	36%	26% 🗸	28%	19% 🔨
Number of COVID-19 cases at destination	17%	40% •	44%	51%	33% 🗸	46%	27% 🗸	33%	17%
The possibility of you infecting others with COVID-19 upon arrival or return	17%	41% •	43%	54%	31% 🗸	28%	16% 🗸	19%	17%
Number of sights and attractions that are currently not open due to COVID-19	12%	27%	27%	34%	24% 💙	17%	14%	16%	12%
Trip cancelation/refund/waive fees/travel nsurances/etc. due to COVID-19 concerns	8%	13%	17%	17%	26%	17%	12%	14%	8% 🥄
Negative reaction from residents in response to visitors	5%	26% •	25%	38%	22% 💙	17%	9% 🔻	9%	5% 🥄
		Nov 12 2020	Jan 6 2021	Apr 14 2021	Jul 7 2021	Sep 29 2021	Nov 26 2021	Feb 4 2022	Mar 4 2022

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?

A Statistically significantly higher than previous wave.

Statistically significantly **lower** than previous wave.



% of Agreement

I hope there is more tourism to my community than there was prior to the pandemic

I hope there is a similar amount of tourism to my

community than there was prior to the pandemic

I hope there is less tourism to my community than there was prior to the pandemic

Attitudes Towards Tourism Post-COVID-19 (Wave 44 - March 4, 2022)

Not sure

BC DESTINAT BRITISH C

43%

22%

16%

19%

Interest in BC Activities/Experiences Compared to Two Years Ago (Wave 44 – Mar 4, 2022)



City stays	60%	21%	12% 7%
Indigenous experiences	59%	17%	12% 13%
Visiting new parts of British Columbia	58%	21%	15% 5%
Outdoor Activities	58%	26%	12%
Road trips	55%	22%	19%
	Stayed the same Increased	Decreased	Not sure

Base: All respondents

D6_Mar 1. In comparison to two years ago, how has your level of interest in the following activities/ experiences in British Columbia changed?

Interest in BC Activities/Experiences Compared to Two Years Ago (Wave 44 – Mar 4, 2022)



City stays	60%	21%	12% 7%
Indigenous experiences	59%	17%	12% 13%
Visiting new parts of British Columbia	58%	21%	15% 5%
Outdoor Activities	58%	26%	12%
Road trips	55%	22%	19%
	Stayed the same Increased Do	ecreased	lot sure

Base: All respondents

D6_Mar 1. In comparison to two years ago, how has your level of interest in the following activities/ experiences in British Columbia changed?

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



Elsewhere in BC (overnight) 9%		45%		24%	22%
Other parts of Canada 9%		33%	19%		39%
US 7%	18%	19%		56%	
Other countries 6%	17%	18%		59%	
Fewer in 2022 than 202	About the sam	e in 2022 as 2021 📃 M	lore in 2022 than 2021	Didn't travel here in	2021, and don't plan to in
respondents				ically significantly <u>higher</u> than ically significantly lower than c	

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).

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 impression with residents	17% 6% 23%	36%
	34% 10% 24%	Try not to have a negative environmental impact	24% 10% 34%	32%
	30% 8% 22%	Try to understand local issues and concerns	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%
Strong	ly agree Somewhat agree		Somewhat disagree Strongly disagree	

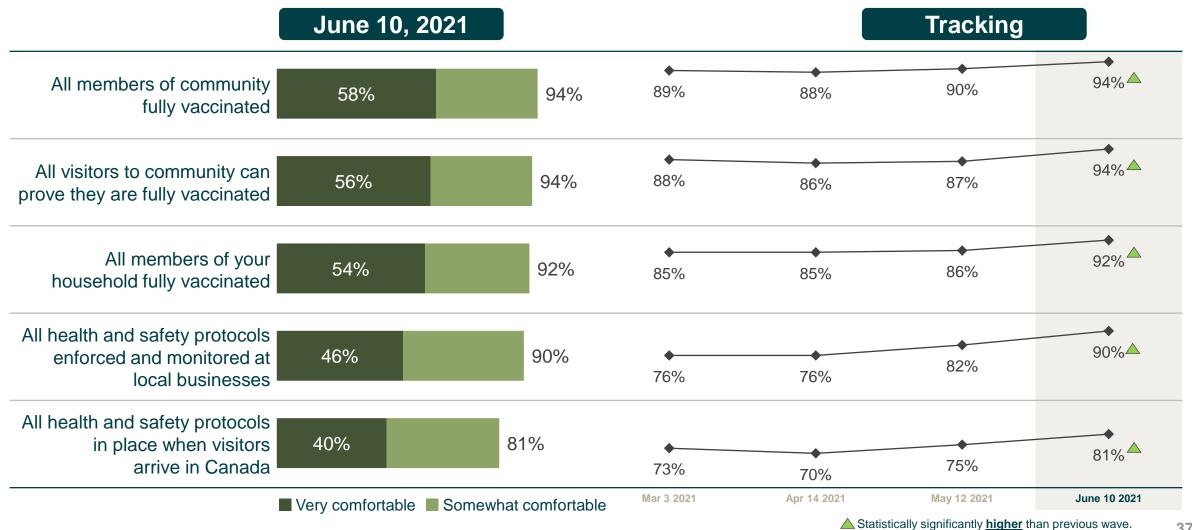
Base: All respondents

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

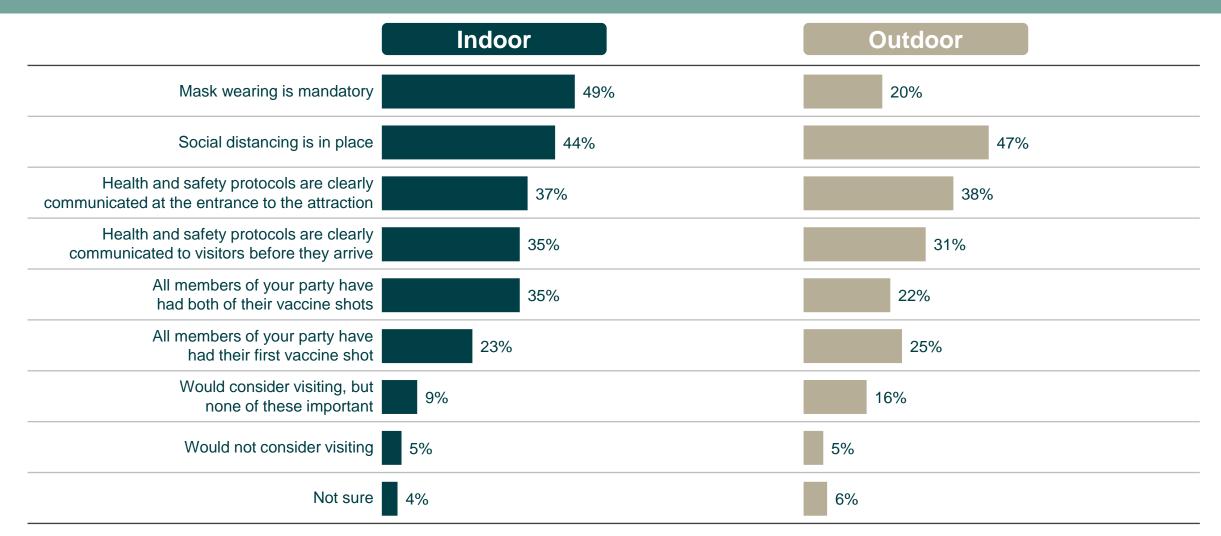
D5. How comfortable would you be with visitors making non-essential trips into your community under each of the following circumstances?

37

Statistically significantly **lower** than previous wave.

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





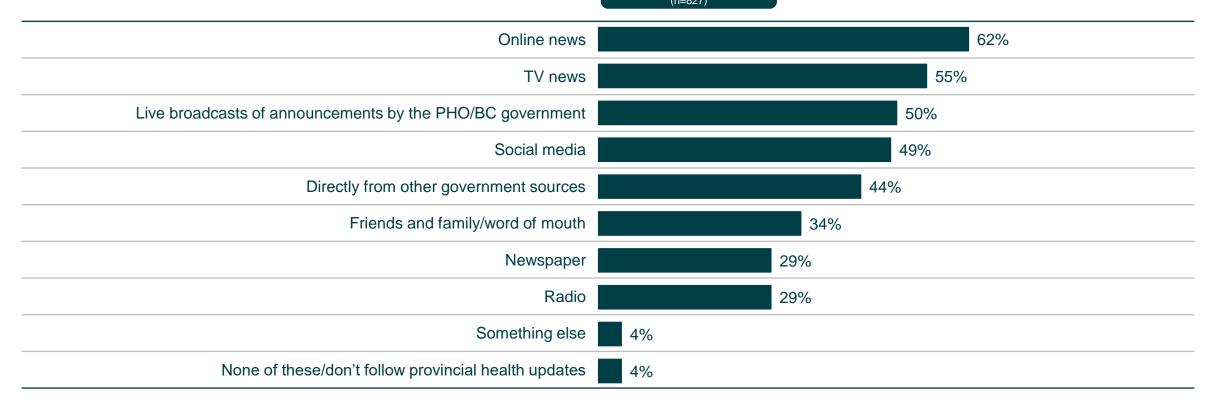
Base: All respondents

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



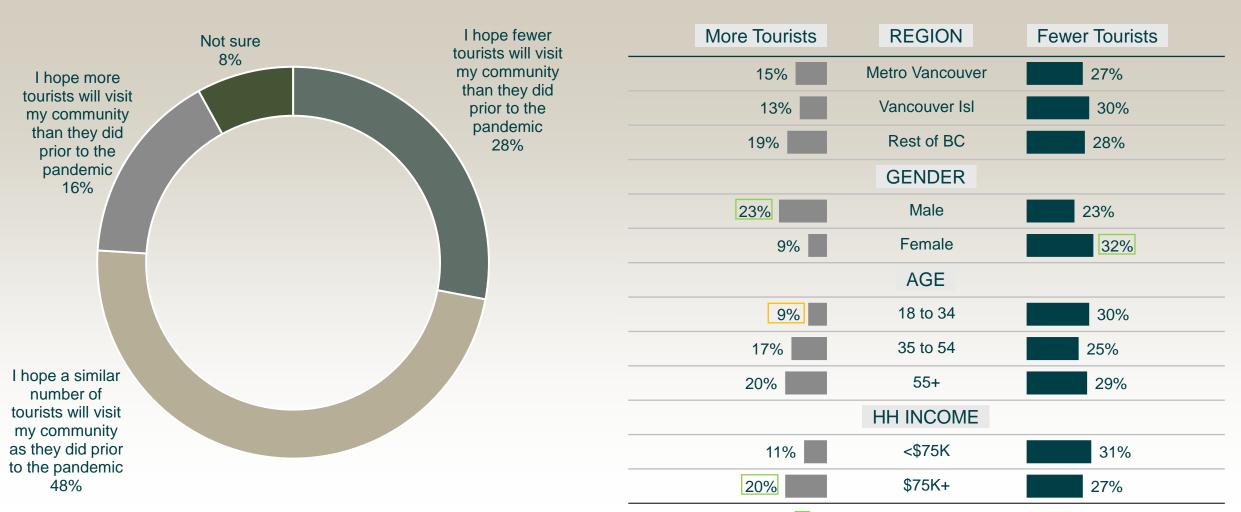
Base: All respondents D6. Which of the following information sources do you use on a weekly basis or more often to learn about provincial health updates regarding COVID-19?

Preferred Tourism Post-Pandemic

(Wave 27 – May 26, 2021)



40



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

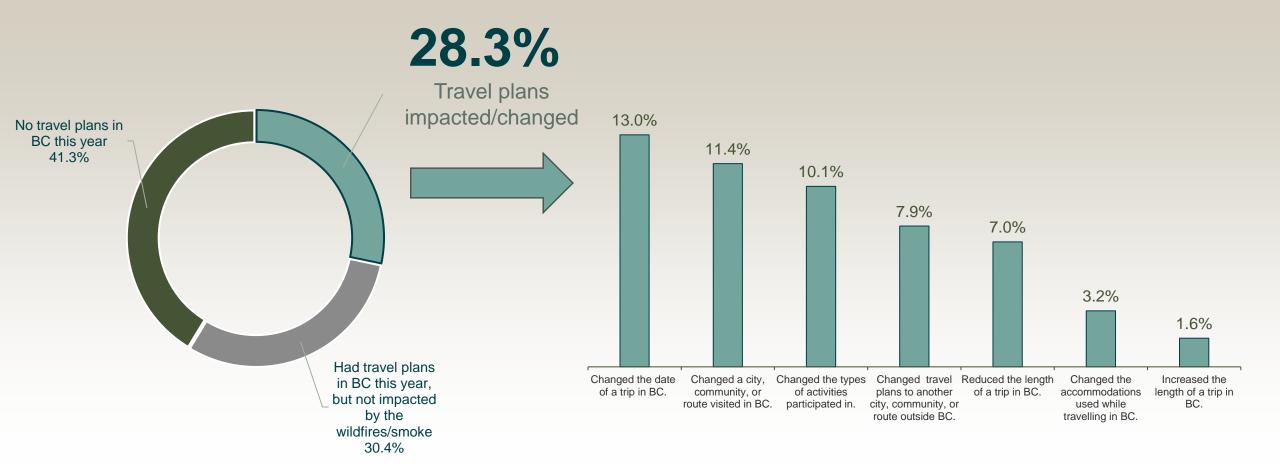
Statistically significantly **lower** than comparison group(s).

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:

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