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BACKGROUND

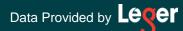


- Destination BC is monitoring British Columbian's current views on travel and tourism as well as tracking travel and tourism behaviour intentions in order to understand the impact of COVID-19 on the tourism industry.
- As such, Destination BC has commissioned Leger (formerly Insights West) to conduct 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%
	Mar 4-6, 2022	1,000	+/-3.1%



KEY HIGHLIGHTS – WHAT'S NEW OR CHANGED



TRAVEL INTENTIONS (SLIDES 6-10)

- BC residents' short term (next 4 weeks) travel intentions continued to trend up this wave. Intentions to travel elsewhere in BC for an overnight trip had a statistically significant increase (up +4 points to 17%) as did trips to the U.S. (up +2 points to 5%).
- Medium term (2-3 months from now) prospects for BC residents' intent to travel jumped significantly, as the lifting of restrictions appears
 to have increased optimism province-wide. Seasonal factors may also play a part.
 - The proportion of BC residents planning to travel within the province in the next 2-3 months increased +10 points to 45% while intent to travel to other provinces in Canada increased +6 points to 21%, both up +10 points compared to this same period in March 2021.

CONCERN WELCOMING VISITORS (SLIDES 11-13)

 BC residents' concern welcoming visitors also continued to drop as there were statistically significant decreases in concern welcoming visitors from all markets, especially from the US, other parts of Canada, and overnight visitors from elsewhere in BC (down -9 points each).

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

- Aligning with the optimism in travel intentions, comfort with activities, modes of transportation, and accommodations continued to improve in Wave 44, with statistically significant increases for all items, except for provincial parks which still had a directional increase.
 - The largest increases were for non-essential airplane travel (up +13 points to 58%), taking a cruise (up +11 points to 41%), indoor tourist attractions (up +8 points to 70%), and eating in a restaurant (up +8 points to 85%).

KEY HIGHLIGHTS – WHAT'S NEW OR CHANGED



REASONS FOR NOT TRAVELLING IN BC FOR AN OVERNIGHT OR DAY TRIP (SLIDE 20)

Reasons for not travelling within BC in the next three months was asked this wave. COVID-19 related concerns continue to decline and sit at record lows, though the risk of being exposed to / getting COVID-19 remains the top reason. As Spring approaches, seasonality is also becoming less of a factor in not travelling. It is noteworthy that concerns regarding COVID-19 protocols not being followed properly has decreased significantly in the past month (down -7%).

ATTITUDES TOWARD TOURISM POST-COVID-19 (SLIDE 21)

- In this wave residents were asked how their attitudes towards tourism may have shifted over the course of the pandemic.
- When asked which of three tourism-volume statements they agree with the most, over four in ten (43%) BC residents 'hope there is a similar amount of tourism to their community than there was prior to the pandemic. About one-in-five (22%) of BC residents hope there is more tourism to their community than there was prior to the pandemic, while 16% percent hope there is less.
- Respondents were asked their level of interest in various BC travel activities compared to prior the pandemic. Level of interest remained the same for most activities with outdoor activities (26%) having the highest proportion of increased interest, followed by road trips (22%), visiting new parts of British Columbia never travelled to before (21%), city stays (20%), and Indigenous experiences (17%).



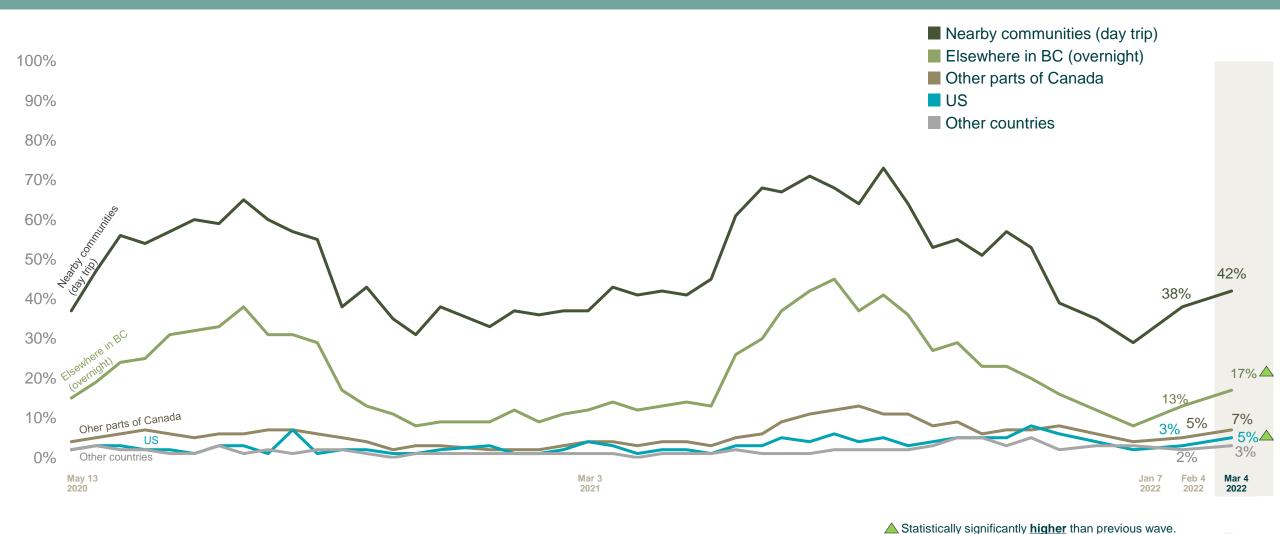
TRAVEL INTENT



Tracking British Columbians' Travel Intent Within Next 4 Weeks





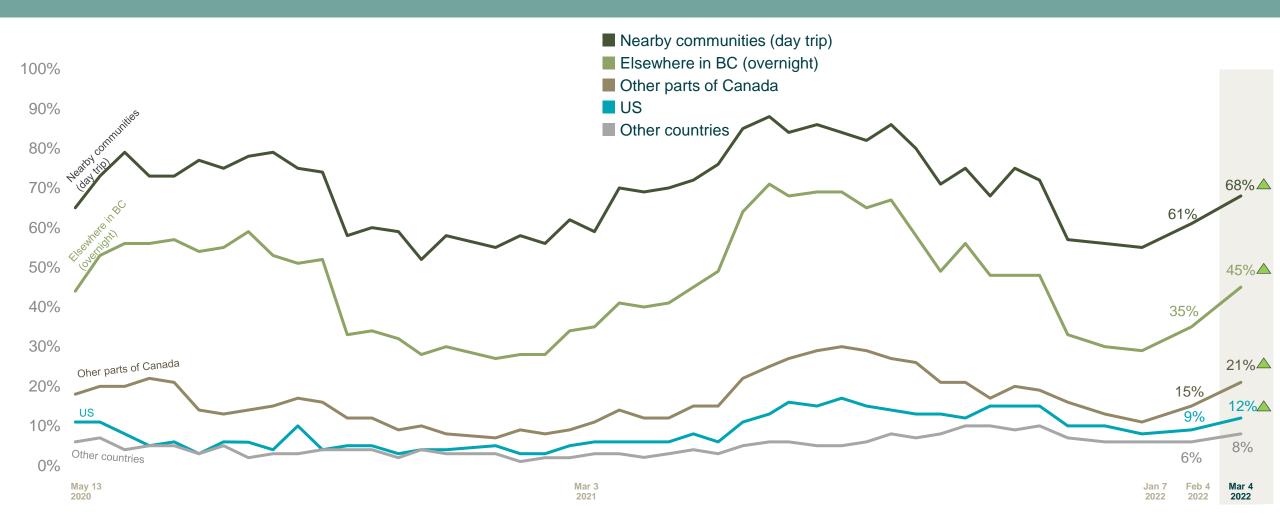


NOTE: Response category "only when vaccine or treatment for COVID-19 available" removed Jun 23, 2021. Base: All respondents

Statistically significantly **lower** than previous wave.

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





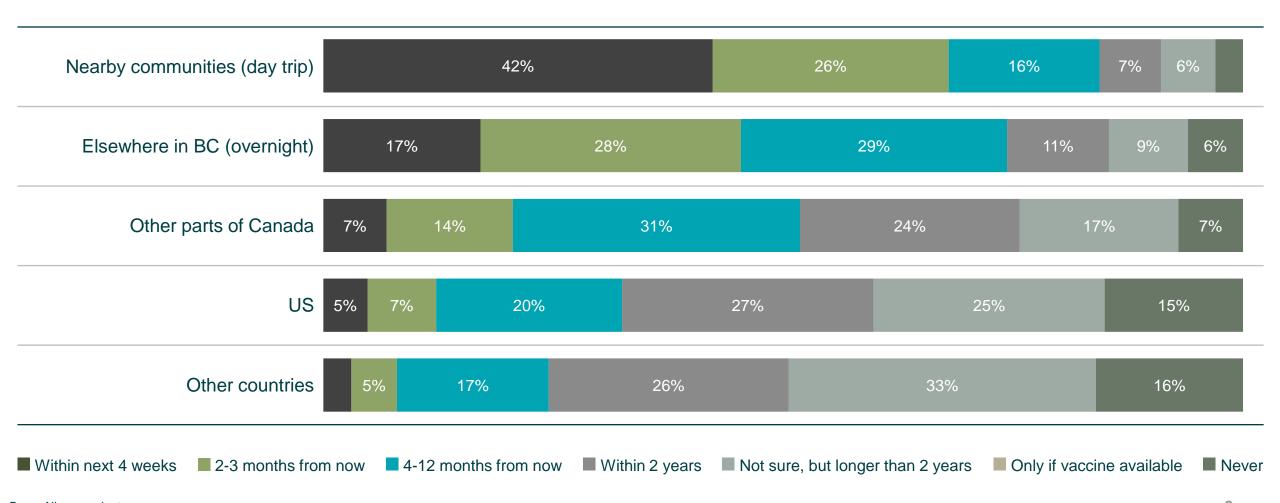
NOTE: Response category "only when vaccine or treatment for COVID-19 available" removed Jun 23, 2021. Base: All respondents

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

Snapshot Of British Columbians' Travel Intentions



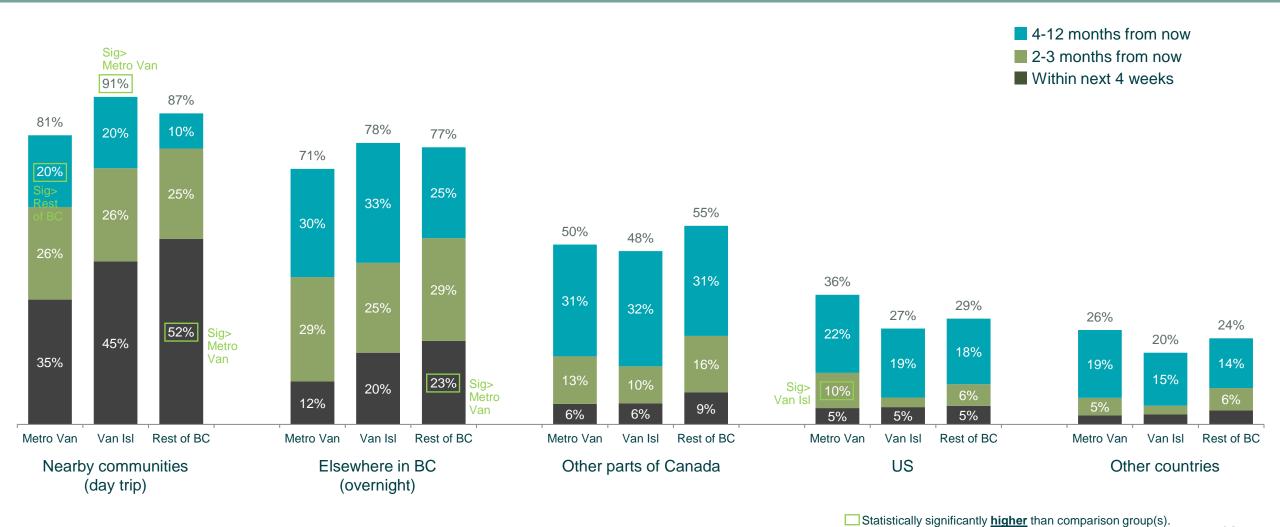




Snapshot Of British Columbians' Travel Intentions By Region



(Wave 44 – Mar 4, 2022)



Statistically significantly lower than comparison group(s).



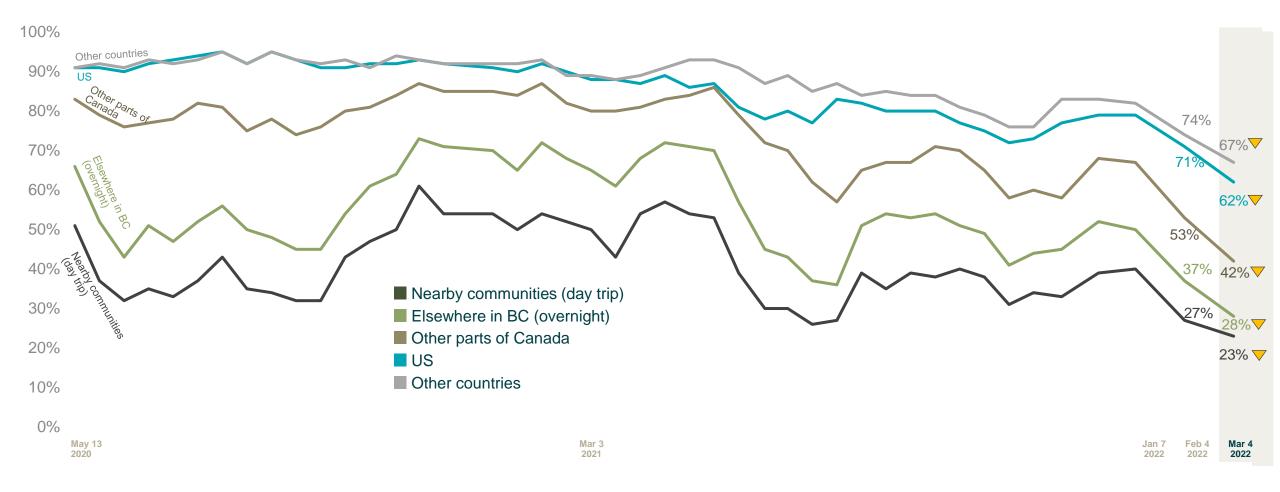
CONCERN WELCOMING VISITORS



Tracking British Columbians' Concern Welcoming Visitors



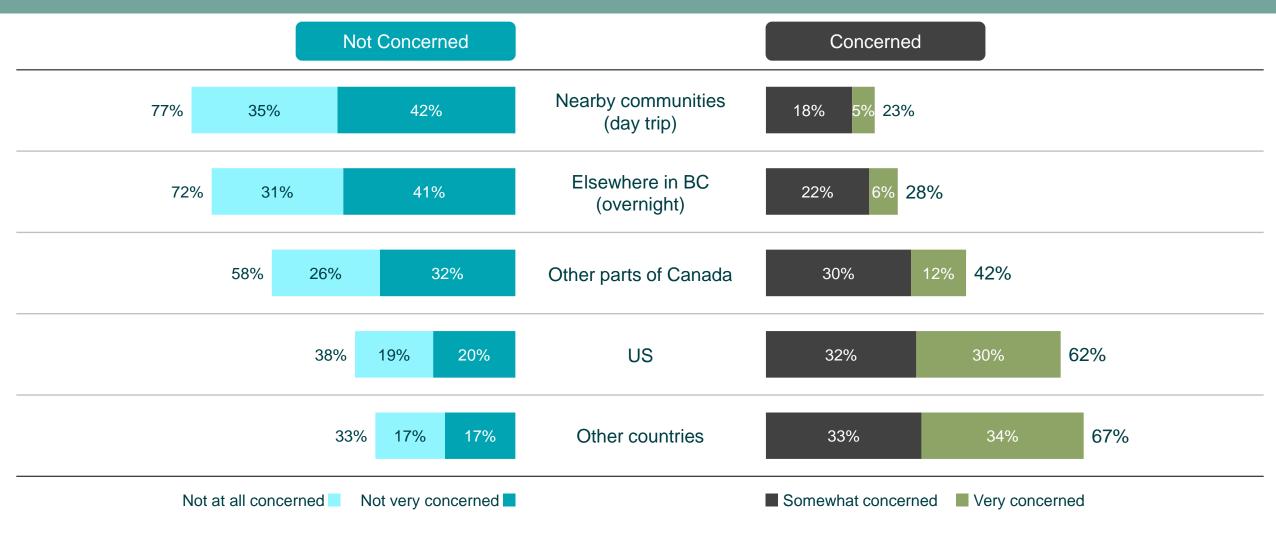
(Total Very/Somewhat Concerned By Visitor Origin)



Snapshot Of British Columbians' Concern Welcoming Visitors DESTINATION BRITISH COLUMBIA*









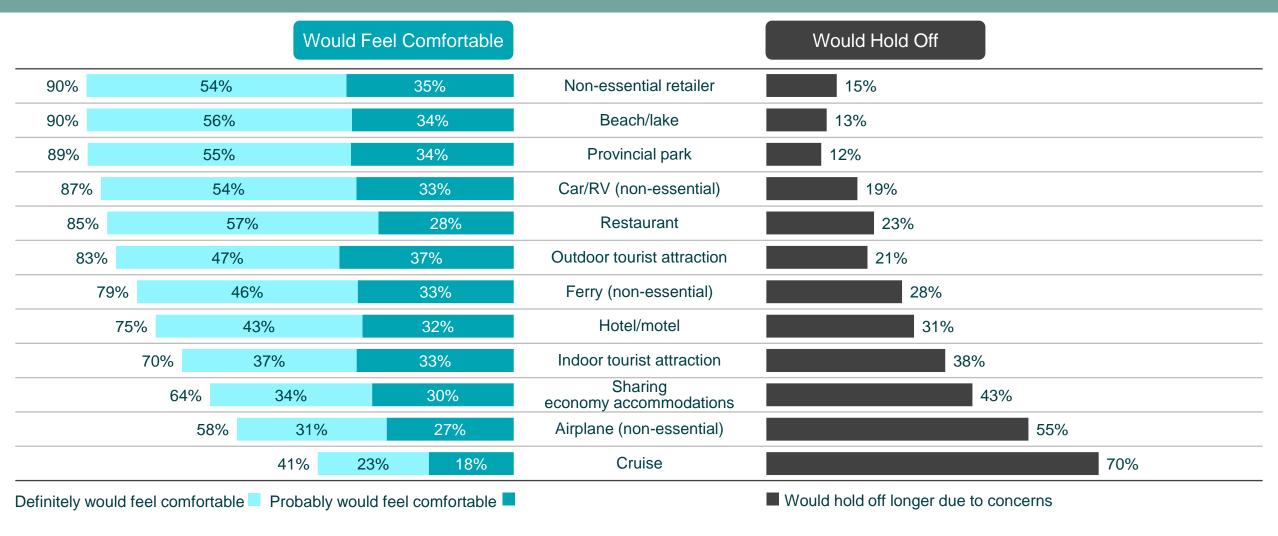
COMFORT LEVELS BY ACTIVITY / TRANSPORTATION / ACCOMMODATION



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



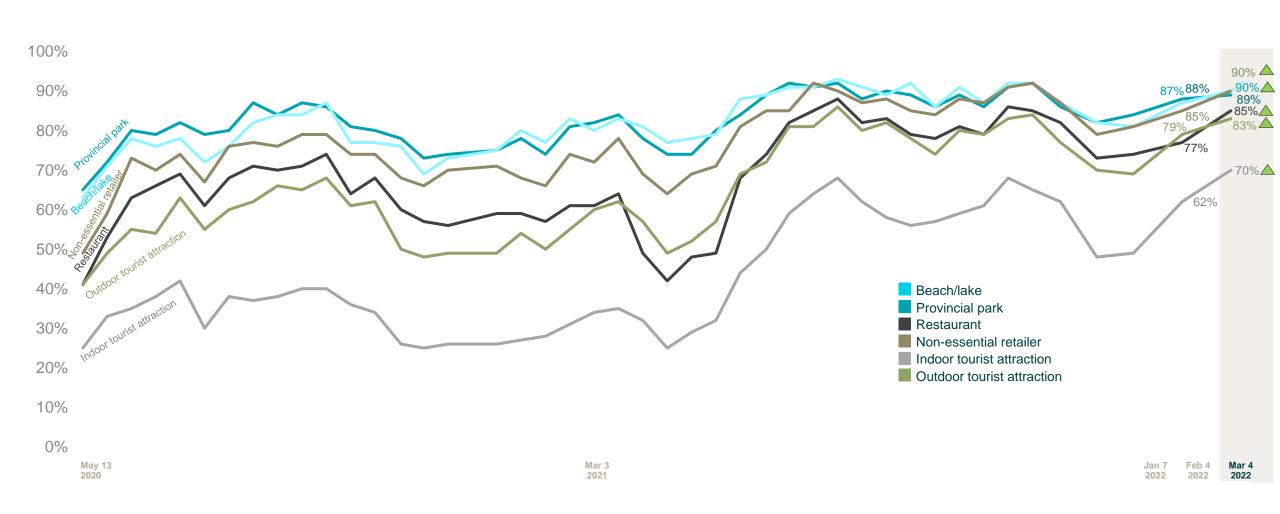
(Wave 44 – Mar 4, 2022)



Tracking British Columbians' Comfort Levels With Activities



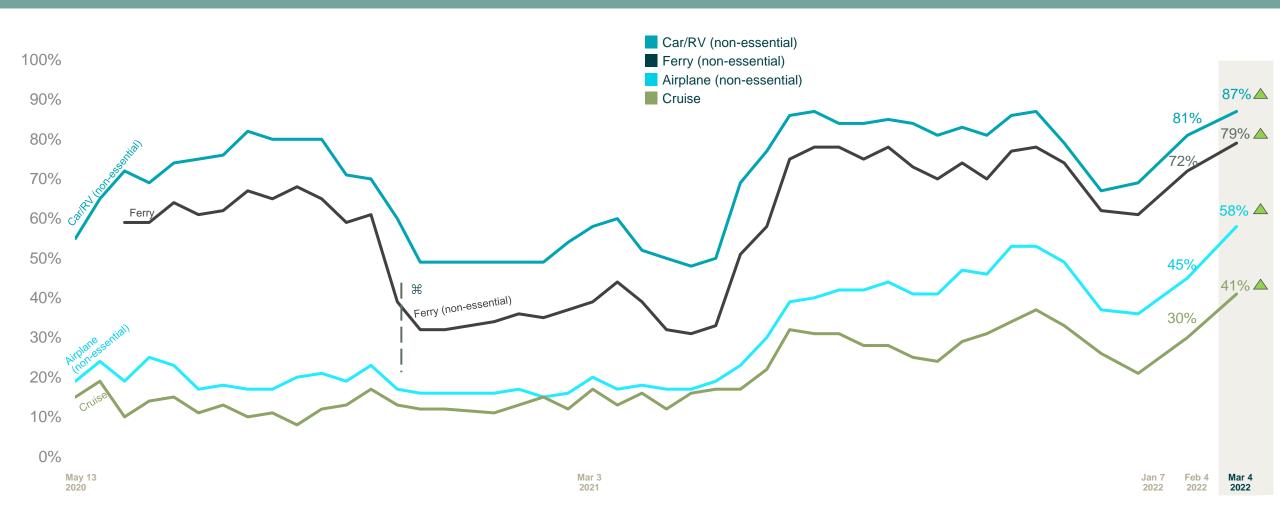
(Total Definitely/Probably Would By Activity)



Tracking British Columbians' Comfort Levels With Transportation Modes



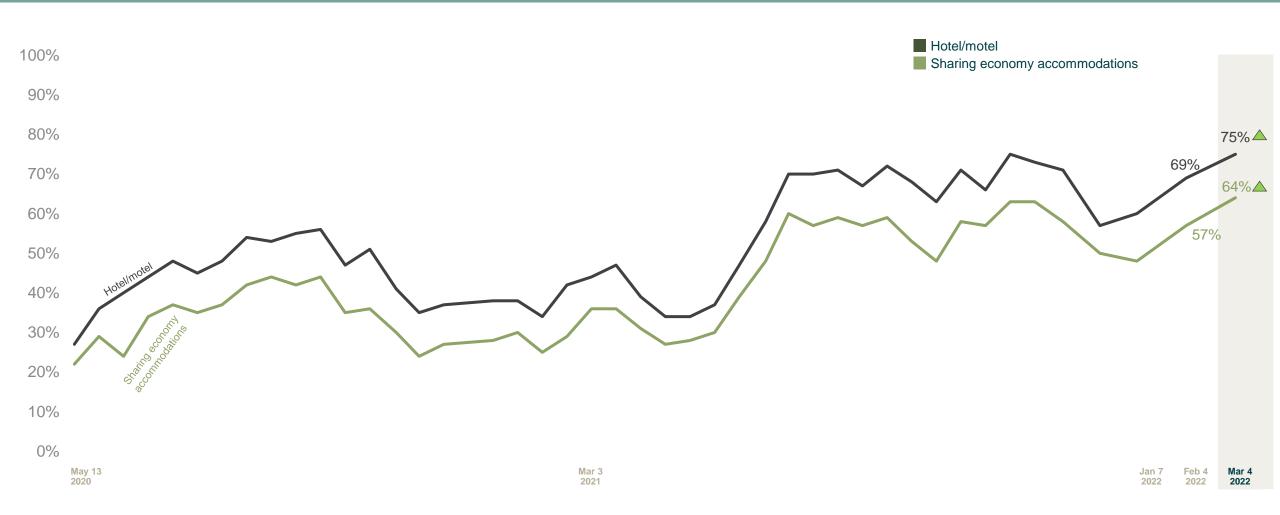
(Total Definitely/Probably Would By Transportation)



Tracking British Columbians' Comfort Levels With Accommodation



(Total Definitely/Probably Would By Accommodation Type)





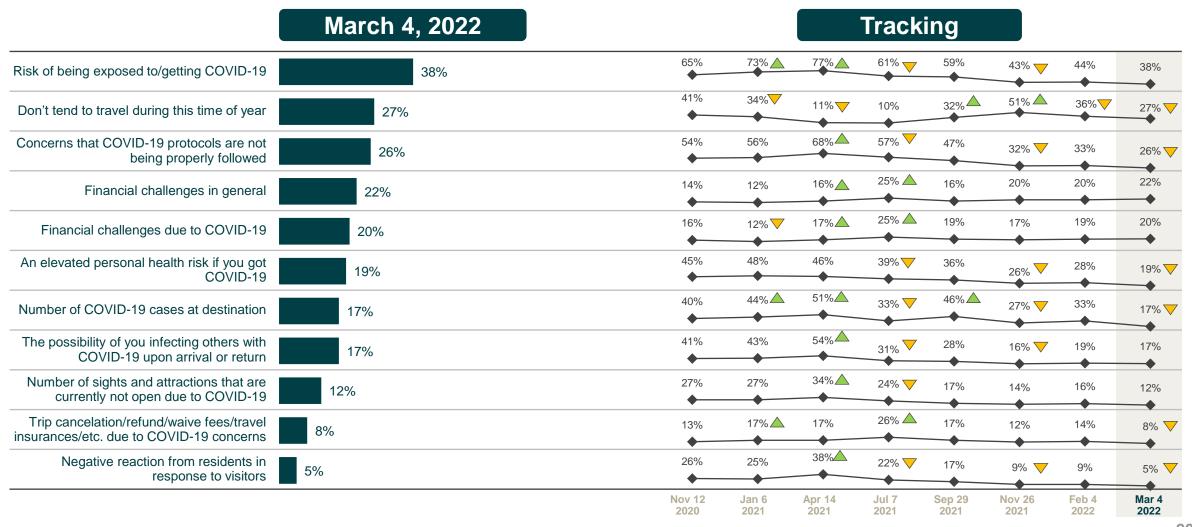
CURRENT AD-HOC FINDINGS



Reasons For Not Considering Future BC Travel (Aided)



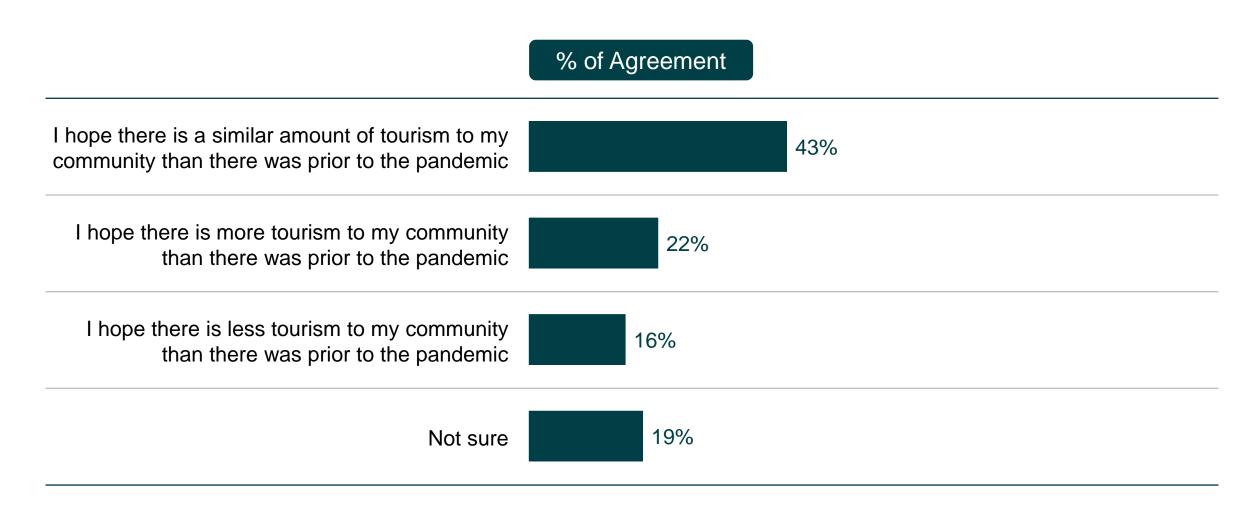
(Among Those Not Intending to Travel in BC in the Next 3 Months)



Attitudes Towards Tourism Post-COVID-19

(Wave 44 - March 4, 2022)

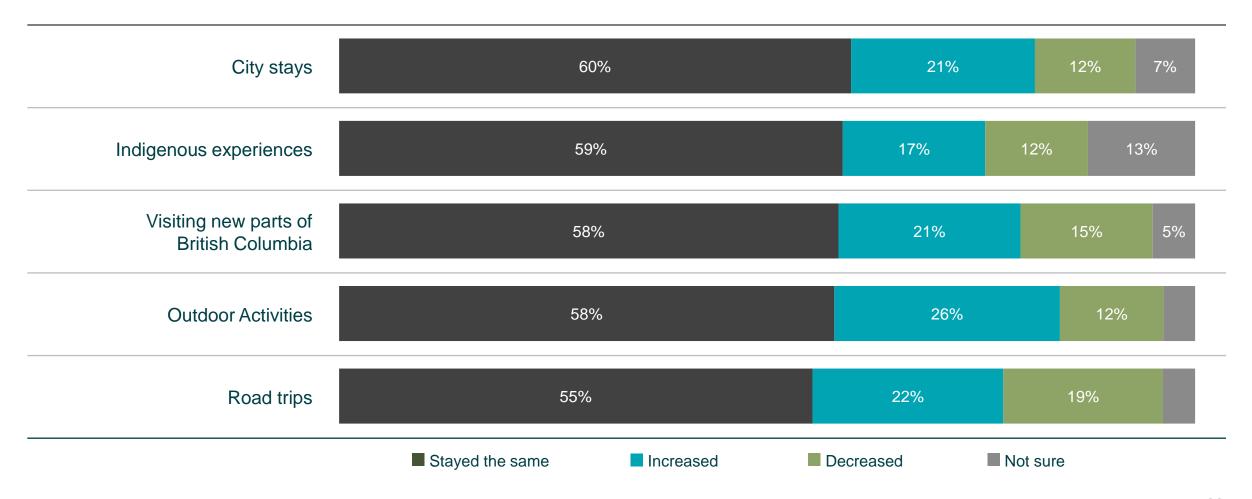




Interest in BC Activities/Experiences Compared to Two Years Ago



(Wave 44 – Mar 4, 2022)





APPENDIX: METRICS BY DEMOGRAPHICS



Snapshot Of British Columbians' Travel Intent By Demographics

84%

17%

42%

Female

74%

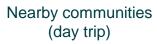
30%

27%















Gender

85%

15%

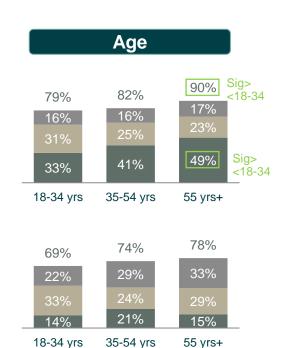
27%

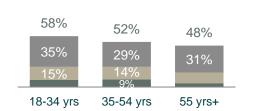
42%

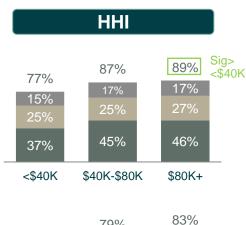
Male

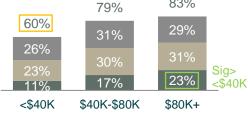
75%

28%











Statistically significantly higher 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 44 – Mar 4, 2022)



Statistically significantly higher than comparison group(s).

Statistically significantly higher than comparison group(s).



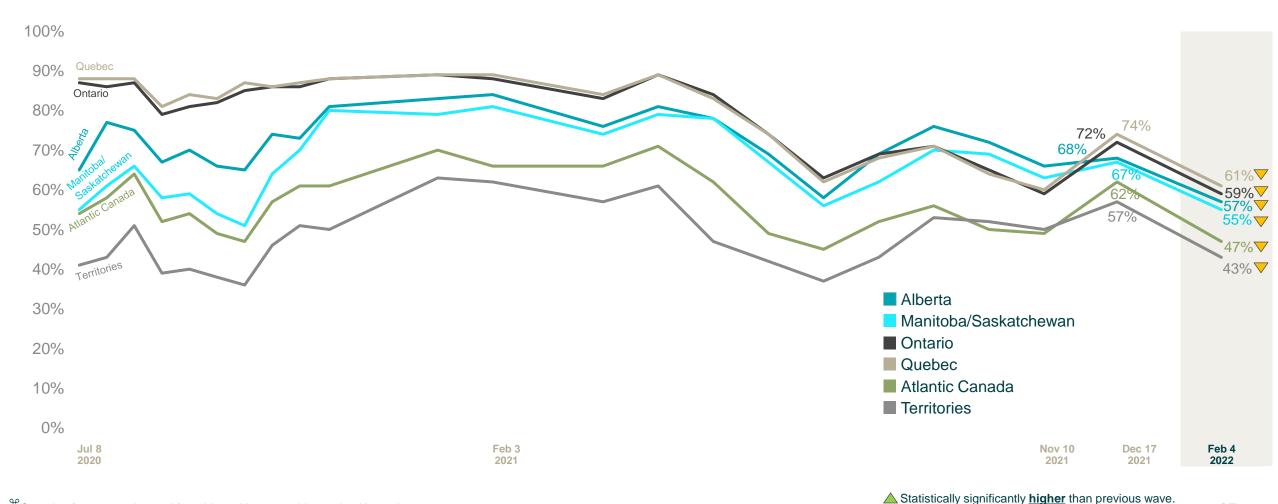
APPENDIX: PAST AD-HOC FINDINGS



Tracking British Columbians' Concern Welcoming Canadian Visitors



(Total Very/Somewhat Concerned By Origin)



 $^{^{}leph}$ Question frequency changed from bi-weekly to monthly starting November 12, 2020. Base: All respondents

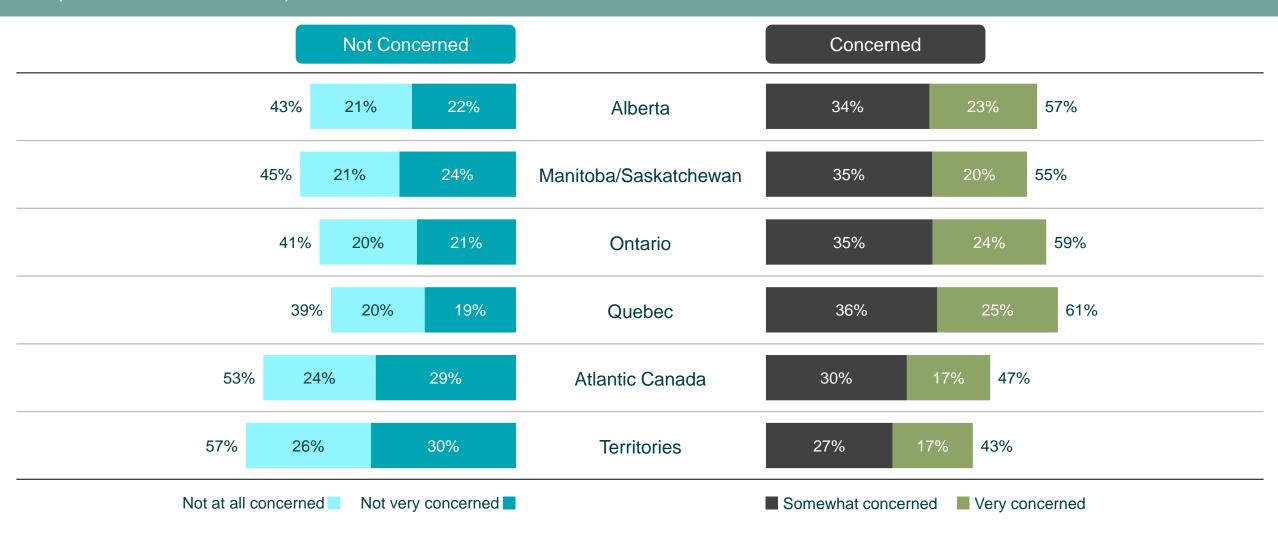
Statistically significantly **Inwar** than provious wave.

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

Snapshot Of British Columbians' Concern Welcoming Canadian Visitors



(Wave 43 – Feb 4, 2022)

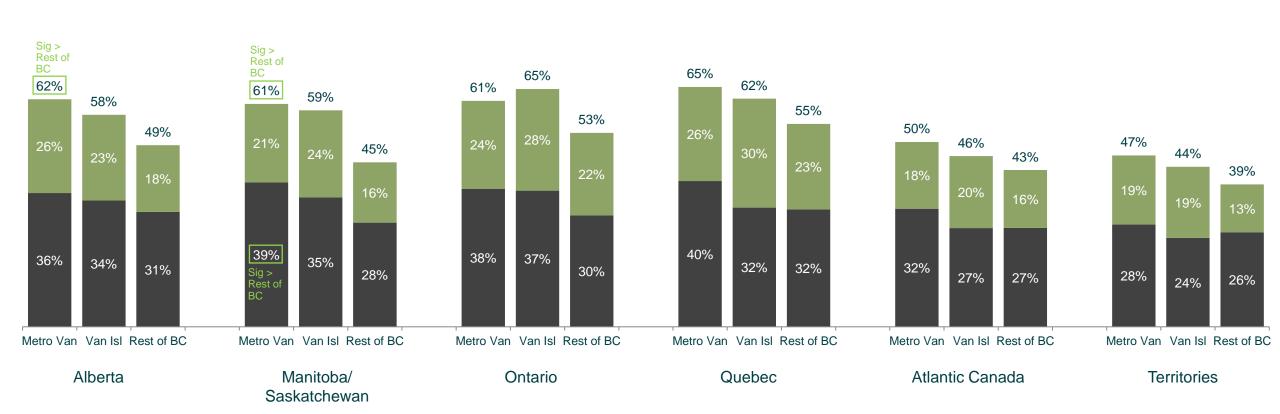


Snapshot Of British Columbians' Concern Welcoming Canadian Visitors By Region



(Wave 43 - Feb 4, 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?

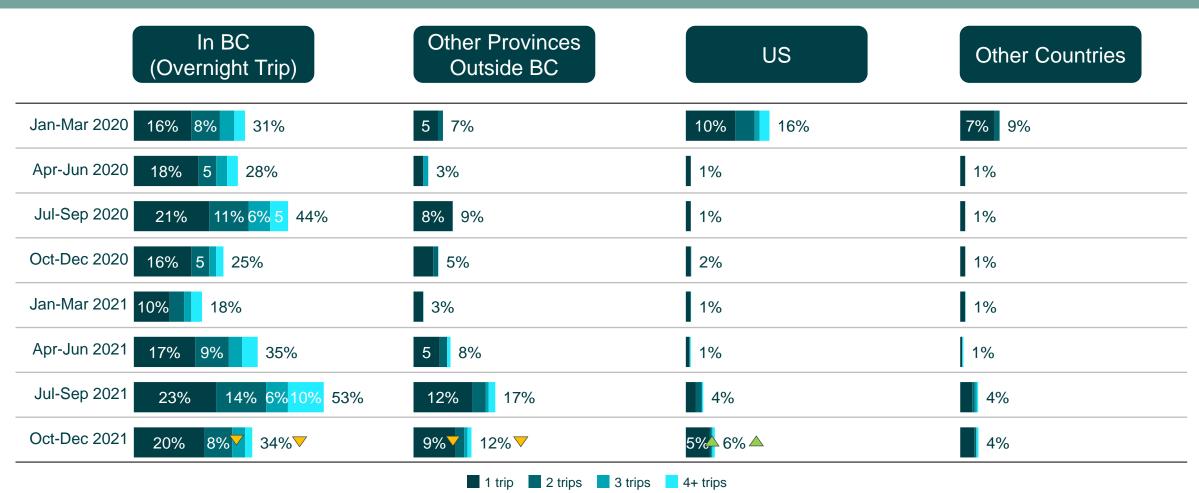
Due to rounding, the sum of the individual values shown may not add up to the total shown.

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

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

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; 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).

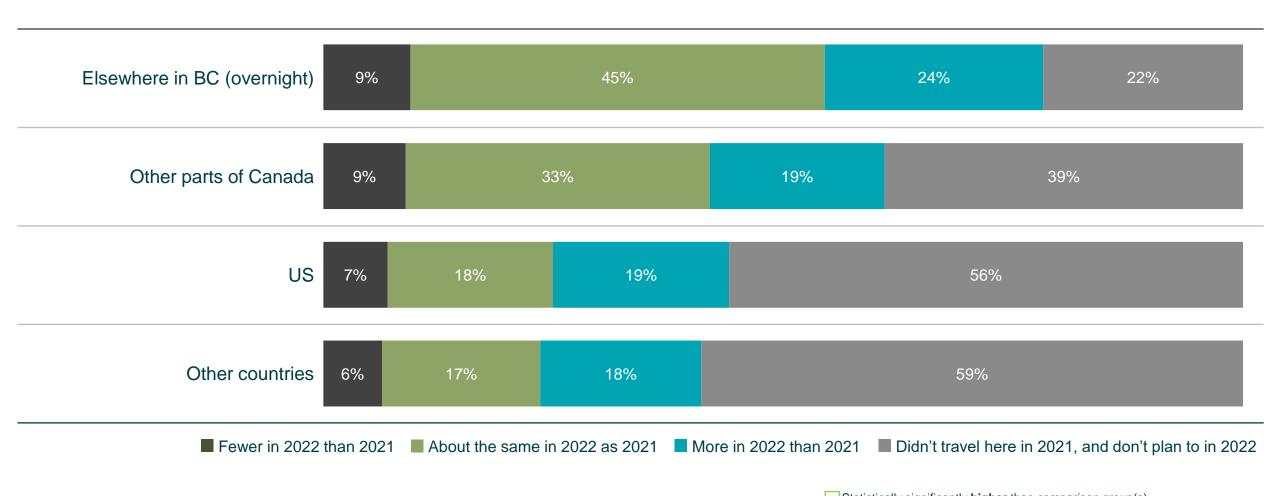
[▲] Statistically significantly higher than previous wave.

✓ Statistically significantly lower than previous wave.

Likely 2022 Travel Compared to 2021

(Wave 41 – Jan 7, 2022)



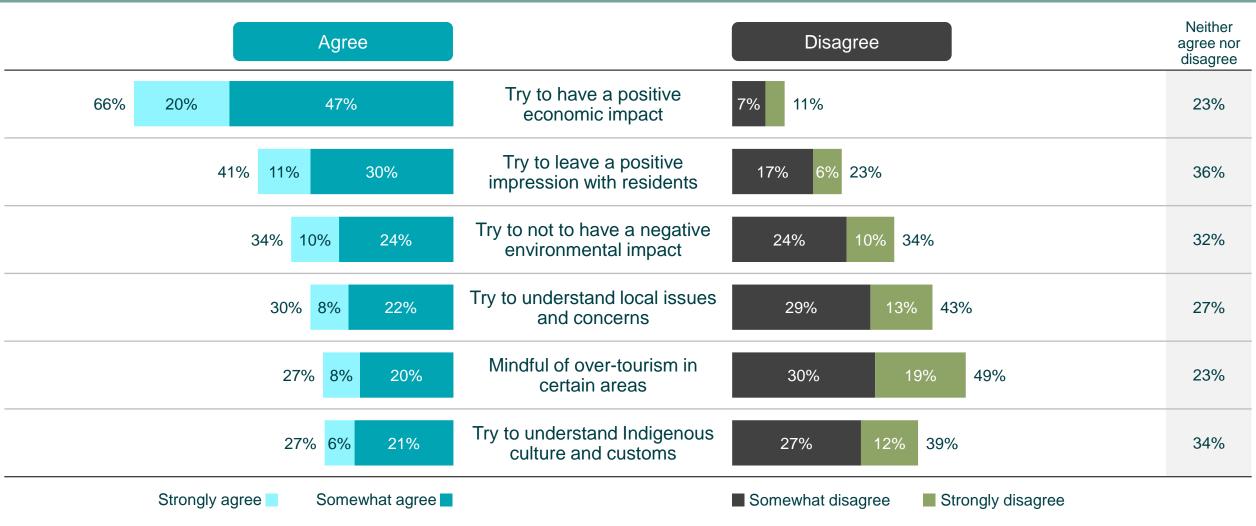


Statistically significantly **lower** than comparison group(s).

British Columbians' Views On Visitors

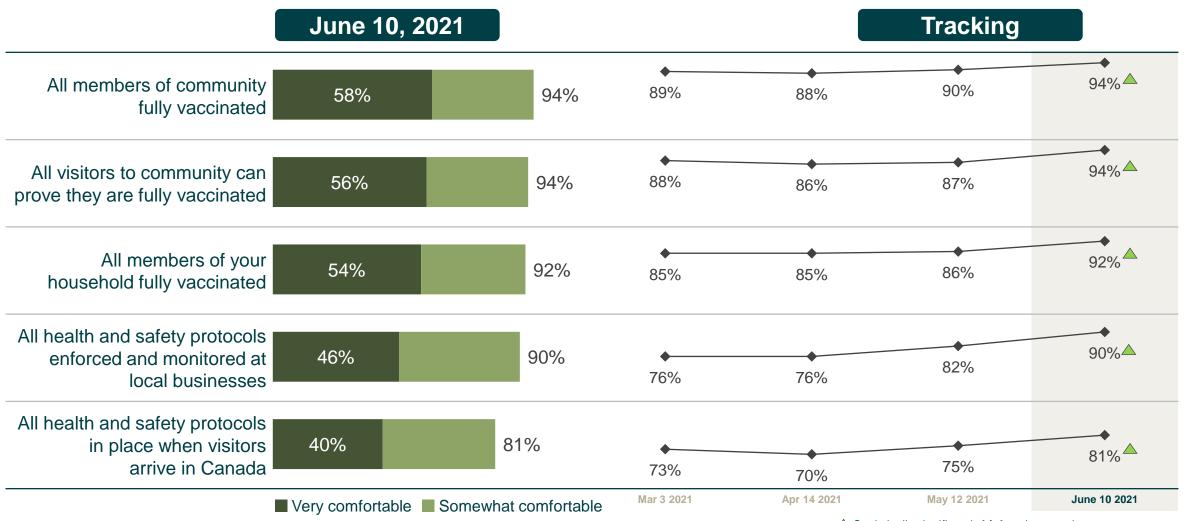


(Wave 32 – August 4, 2021)



Comfort With Welcoming Visitors Under Various Circumstances

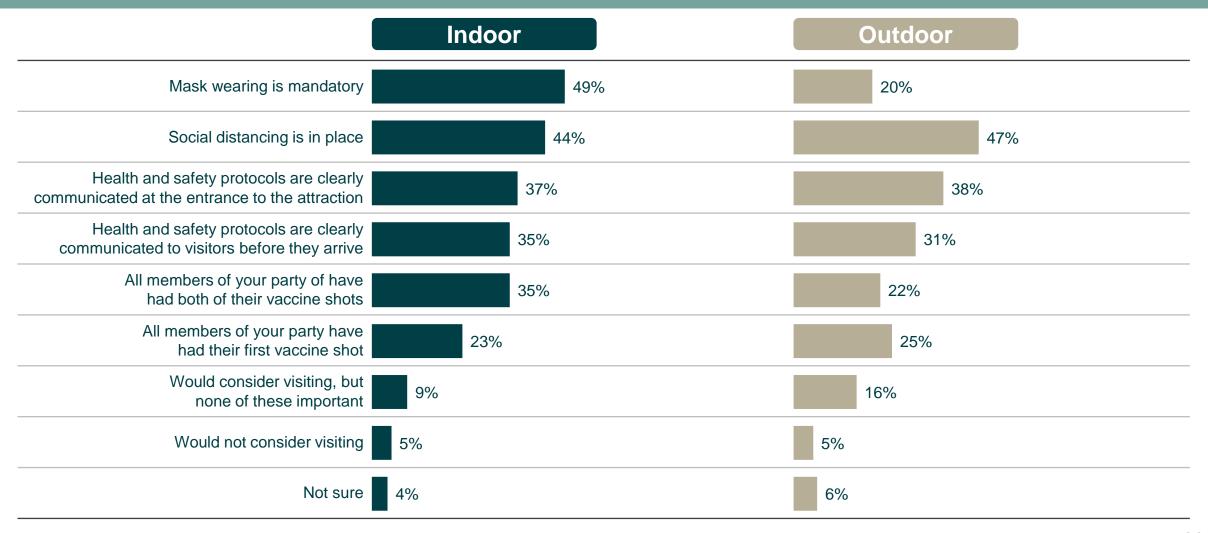




Important Circumstances In Visiting BC Attractions (Aided)



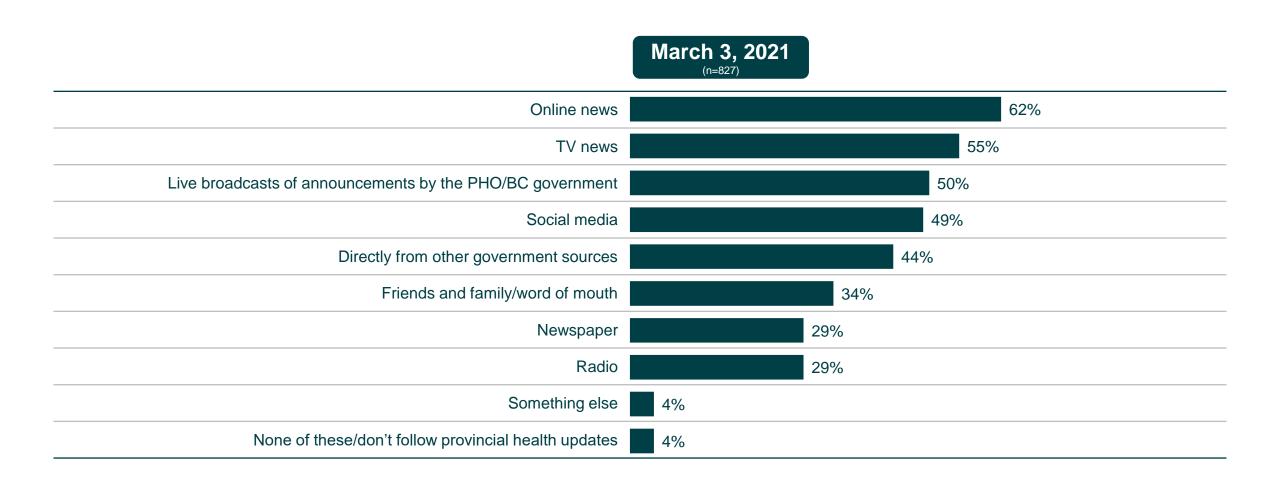
(Wave 29 – June 23, 2021)



Source Of Provincial COVID-19 Health Updates

DESTINATION BRITISH COLUMBIA®

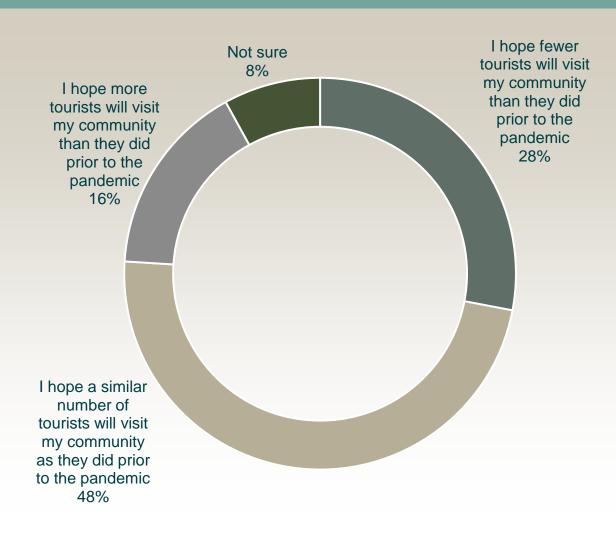
(Wave 21 - March 3, 2021)

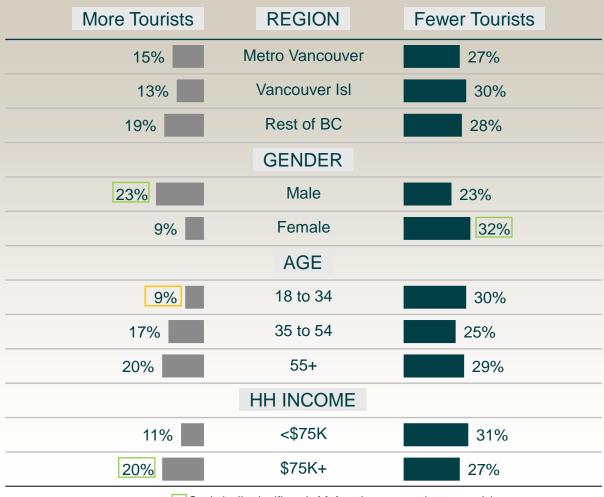


Preferred Tourism Post-Pandemic

(Wave 27 – May 26, 2021)







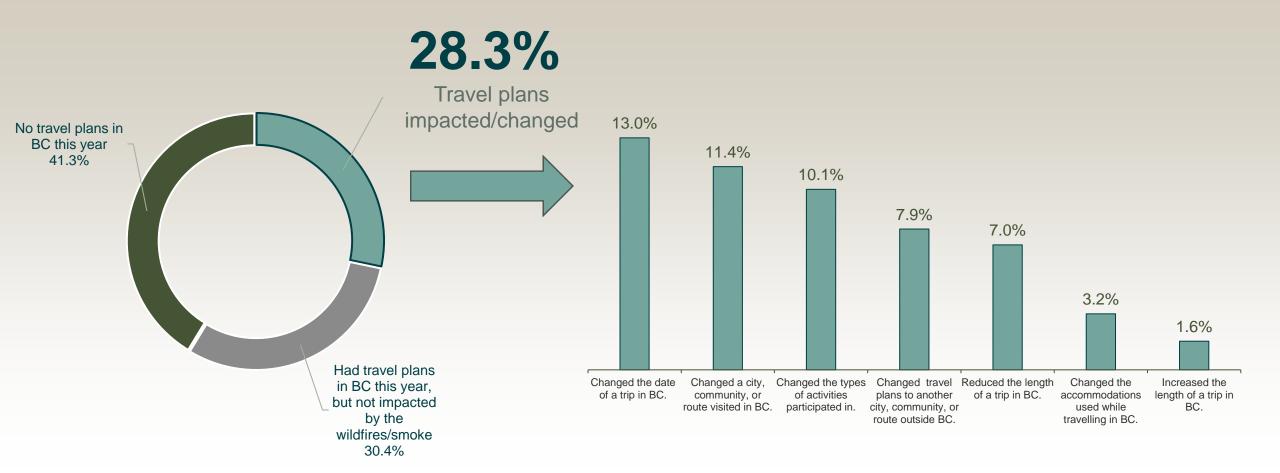
Statistically significantly higher than comparison group(s).

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

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

