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#### BACKGROUND

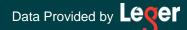


- Destination BC is monitoring British Columbian's current views on travel and tourism as well as tracking travel and tourism behaviour intentions in order to understand the impact of COVID-19 on the tourism industry.
- As such, Destination BC has commissioned Leger (formerly Insights West) to conduct 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.
- 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%
72		000	17 0.170



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



#### **PAST TRAVEL (SLIDES 6-7)**

- Measured quarterly, reported travel in the October-December 2021 time period is lower versus the three months before (July-September 2021) which is likely in large part due to expected seasonal variations. Relative to the same time last year, travel to all destinations was significantly stronger, signalling increased confidence in travel since 2020. This may in part due to less stringent health and travel restrictions compared to this same time period in 2020.
  - Compared to the same period in 2020, BC residents overnight trips within the province increased +9 points to 34%, trips to other provinces increased +7 points to 12%, trips to the US increased +4 points to 6%, and trips to other countries increased +3 points to 4%.

#### **TRAVEL INTENTIONS (SLIDES 8-12)**

- The downward trend in travel intention in the short term (next 4 week timeframe) has continued this wave, with statistically significant decreases for all destinations compared to two weeks ago. Medium term travel intent (2-3 months timeframe), however, has remained mostly flat.
  - Of note, travel intent within BC in the next 4-weeks is at or near its historical low point in the study to date with 29% of BC residents planning a day trip to nearby communities, a decrease of -6 points from two weeks ago; and 8% of BC residents planning an overnight trip in BC, a decrease of -4 points from two weeks ago.

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



#### **CONCERN WELCOMING VISITORS (SLIDES 13-15)**

 BC residents' concern welcoming visitors is flat from two weeks ago – this is true for visitors from all places inside and outside of Canada.

#### **COMFORT WITH ACTIVITIES/MODES OF TRANSPORTATION (SLIDES 16-20)**

- Comfort levels with activities and modes of transportation mirroring concern levels about visitors to their community remained flat this wave compared to last.
  - The only significant change to note is a decline in comfort with taking a cruises which decreased -5 points to 21%; still well above the comfort levels with a cruise at this same time last year (11%).

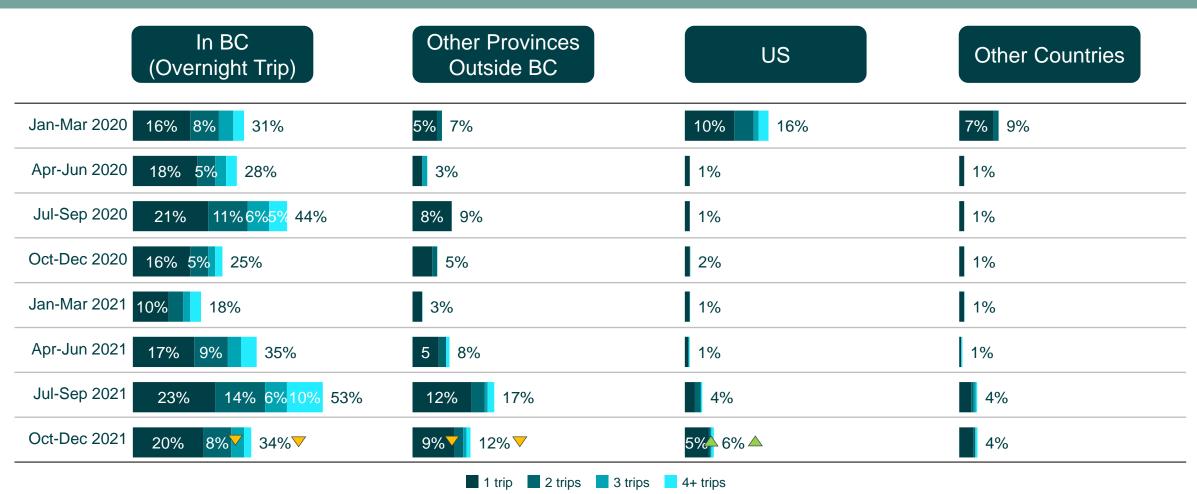


### PAST TRAVEL



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

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



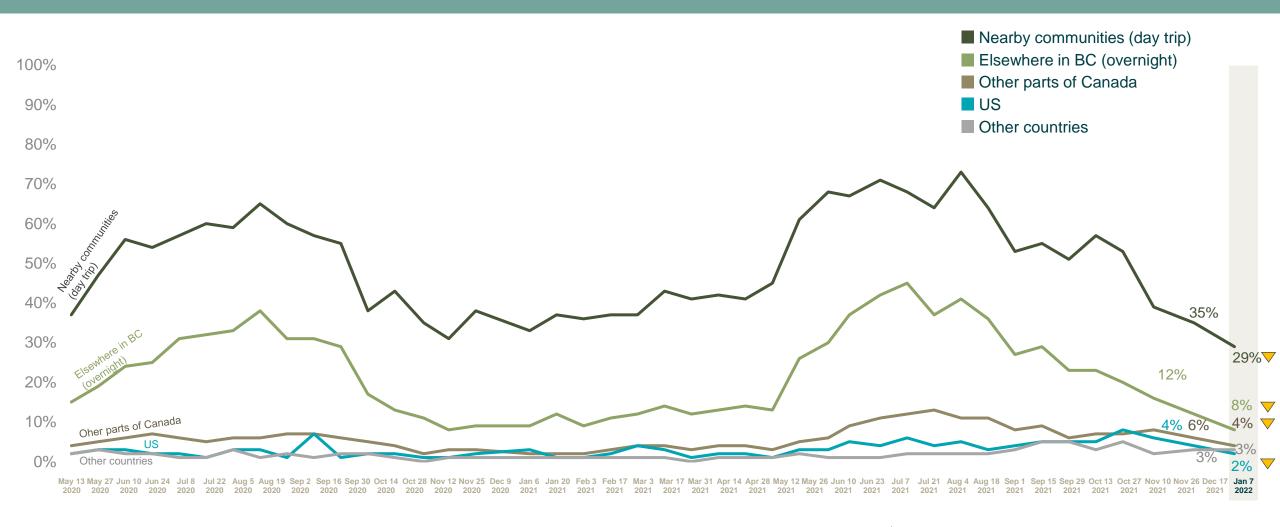
### TRAVEL INTENT



### Tracking British Columbians' Travel Intent Within Next 4 Weeks

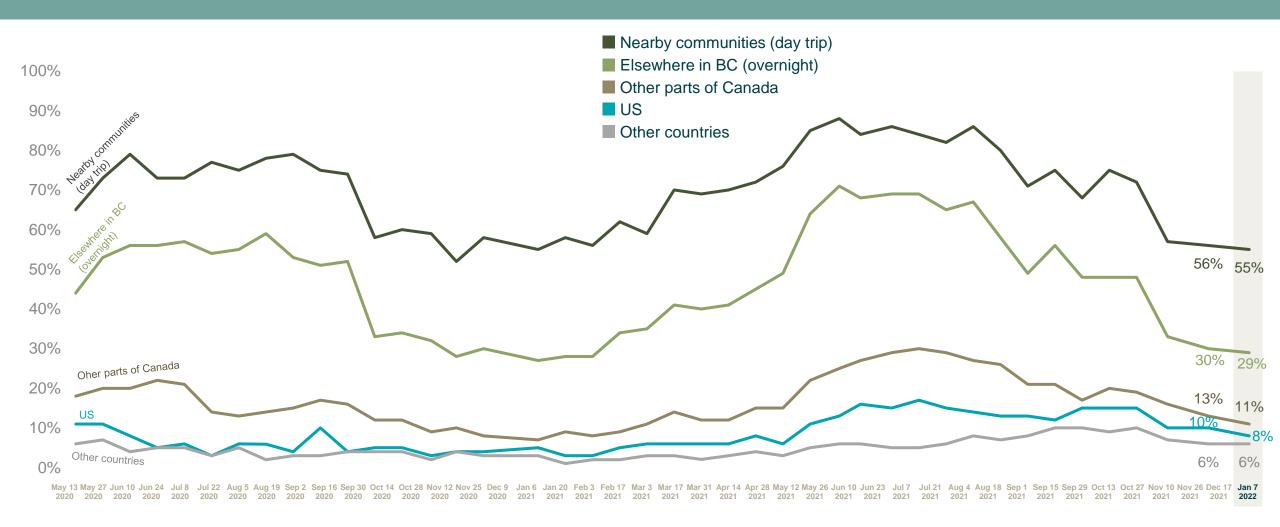






### Tracking British Columbians' Travel Intent Within Next 2-3 Months (By Destination)

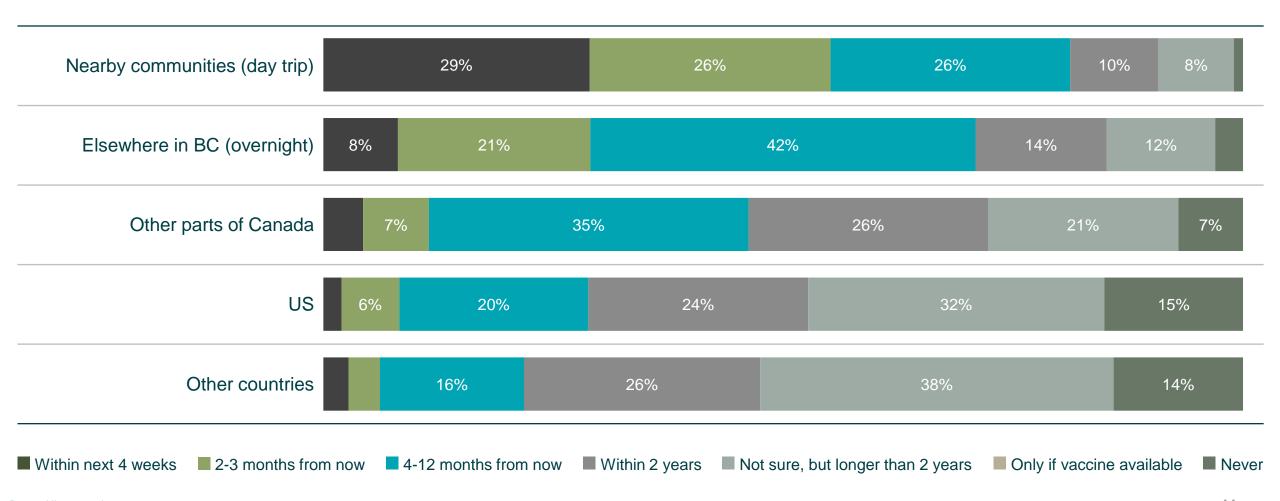




### Snapshot Of British Columbians' Travel Intentions



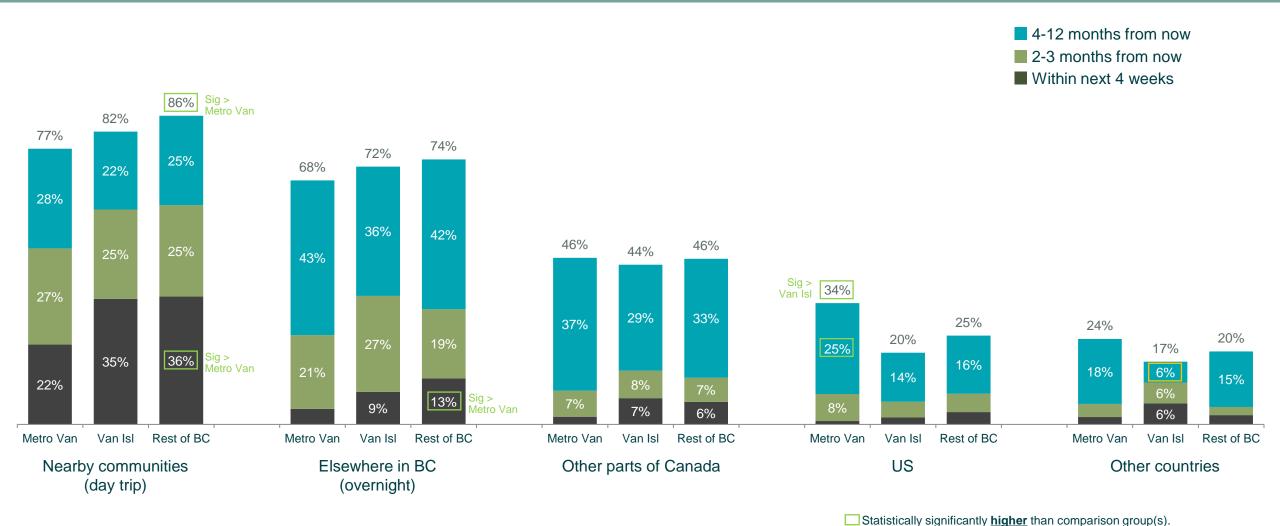




## Snapshot Of British Columbians' Travel Intentions By Region



(Wave 42 – Jan 7, 2022)



Statistically significantly lower than comparison group(s).



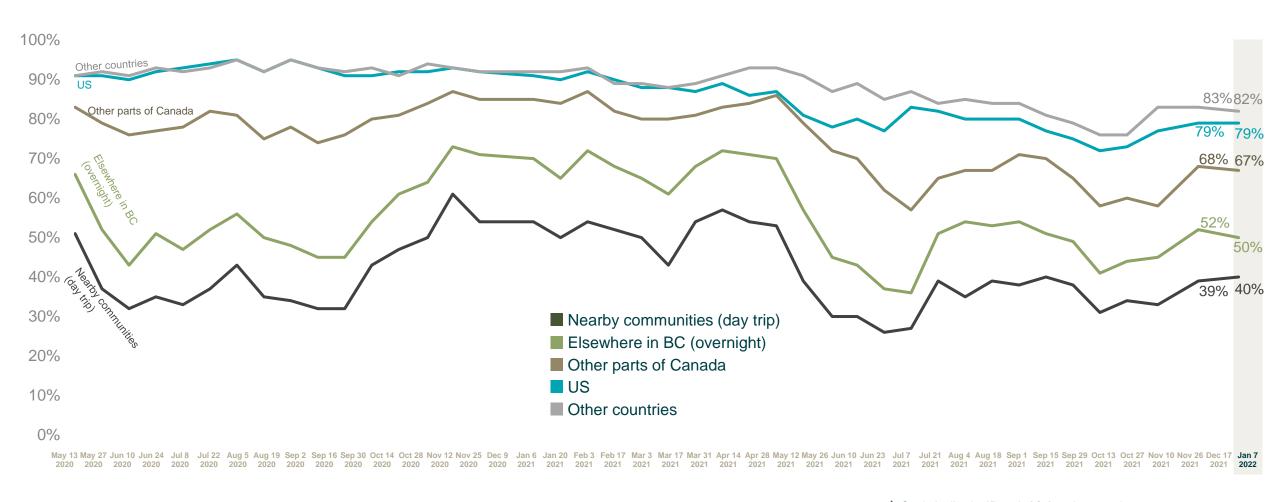
### **CONCERN WELCOMING VISITORS**



### Tracking British Columbians' Concern Welcoming Visitors



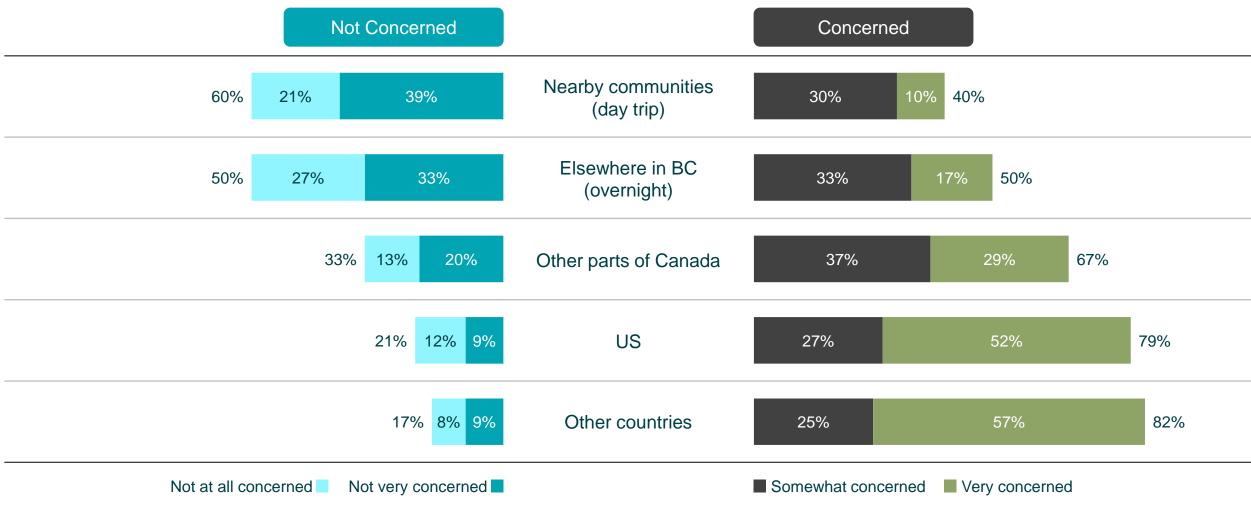
(Total Very/Somewhat Concerned By Visitor Origin)



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



(Wave 42 - Jan 7, 2022)



Base: All respondents



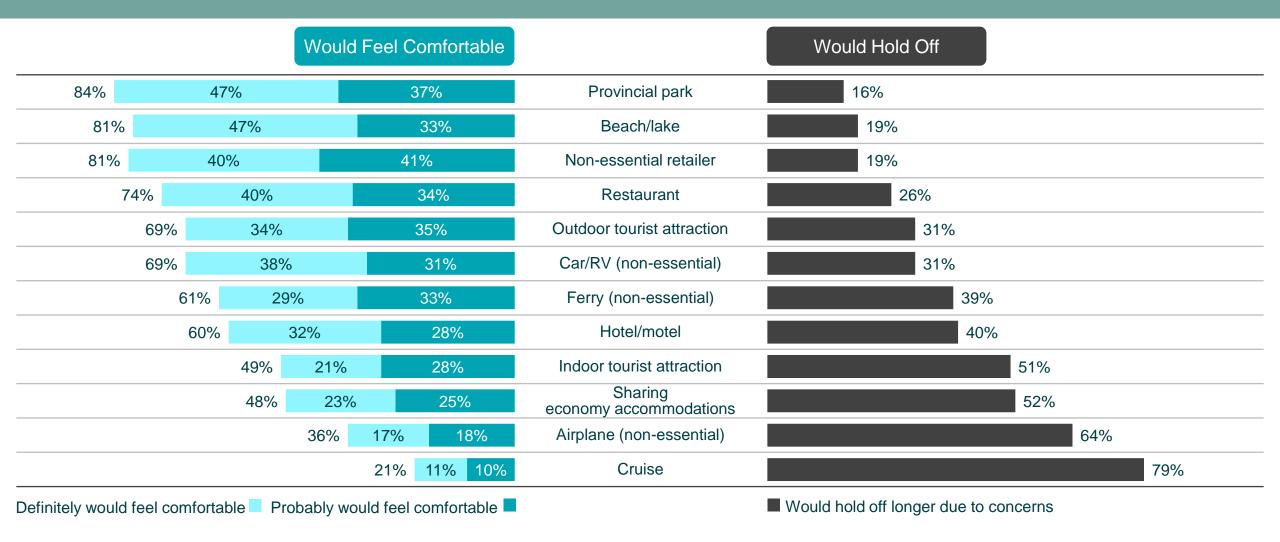
## COMFORT LEVELS BY ACTIVITY / TRANSPORTATION / ACCOMMODATION



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



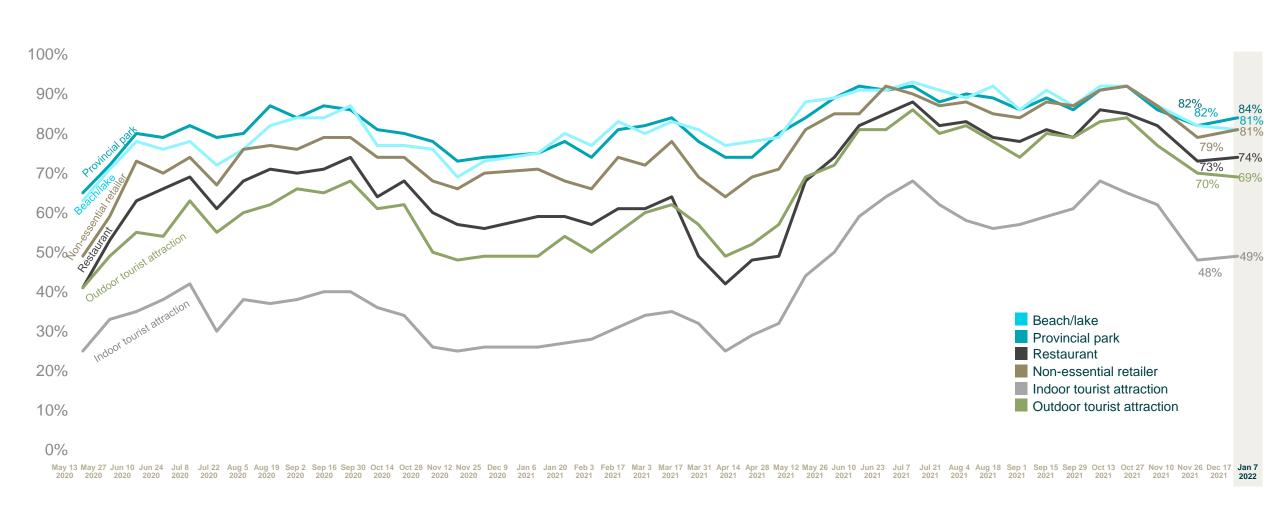
(Wave 42 – Jan 7, 2022)



## Tracking British Columbians' Comfort Levels With Activities



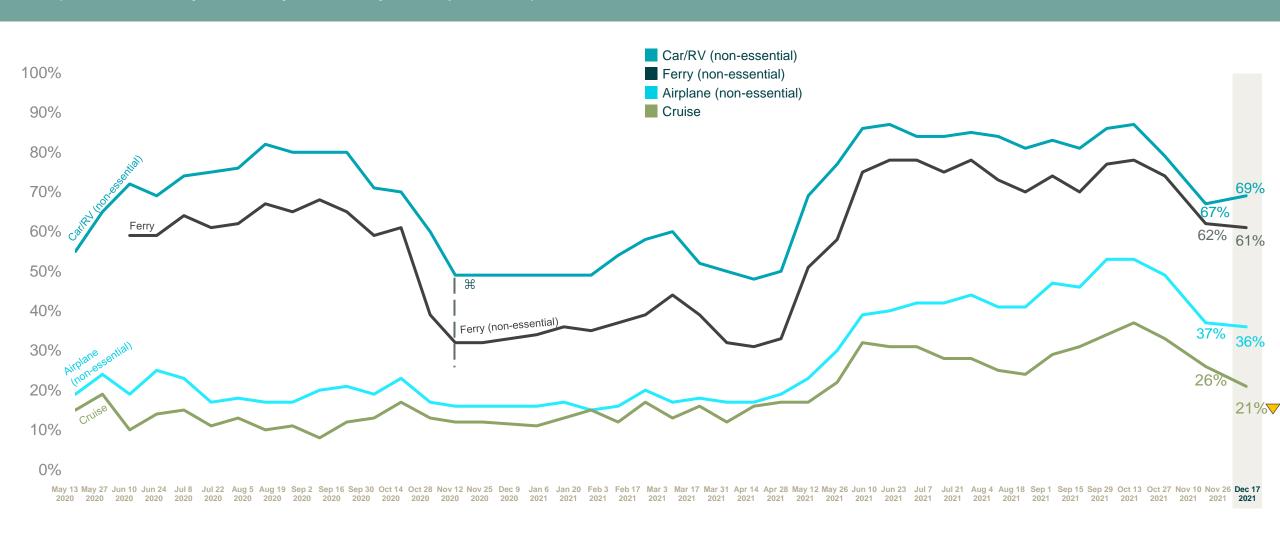
(Total Definitely/Probably Would By Activity)



# Tracking British Columbians' Comfort Levels With Transportation Modes



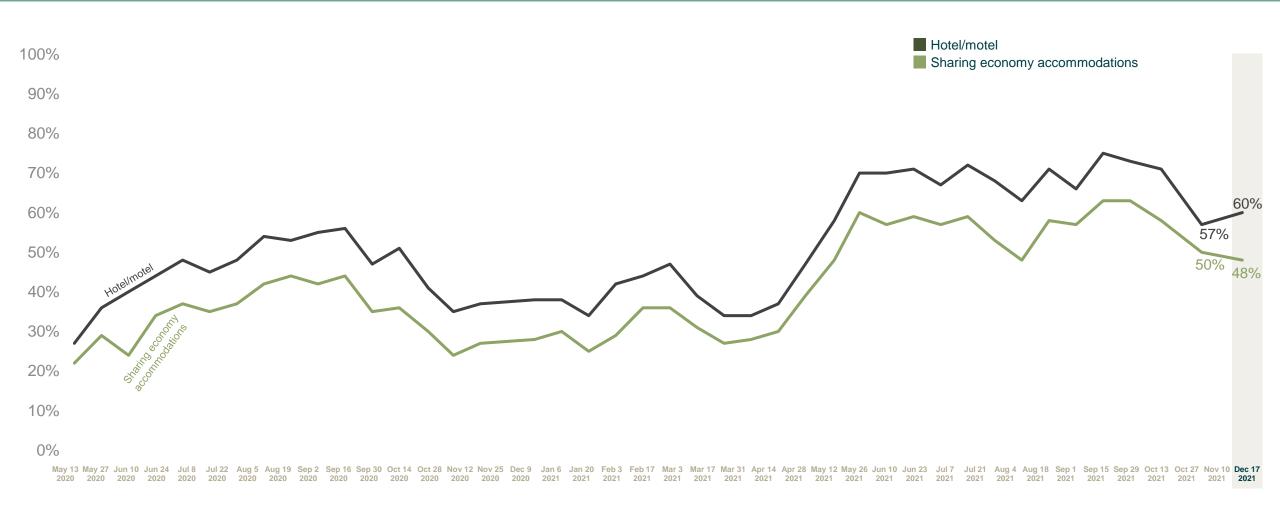
(Total Definitely/Probably Would By Transportation)



## Tracking British Columbians' Comfort Levels With Accommodation



(Total Definitely/Probably Would By Accommodation Type)





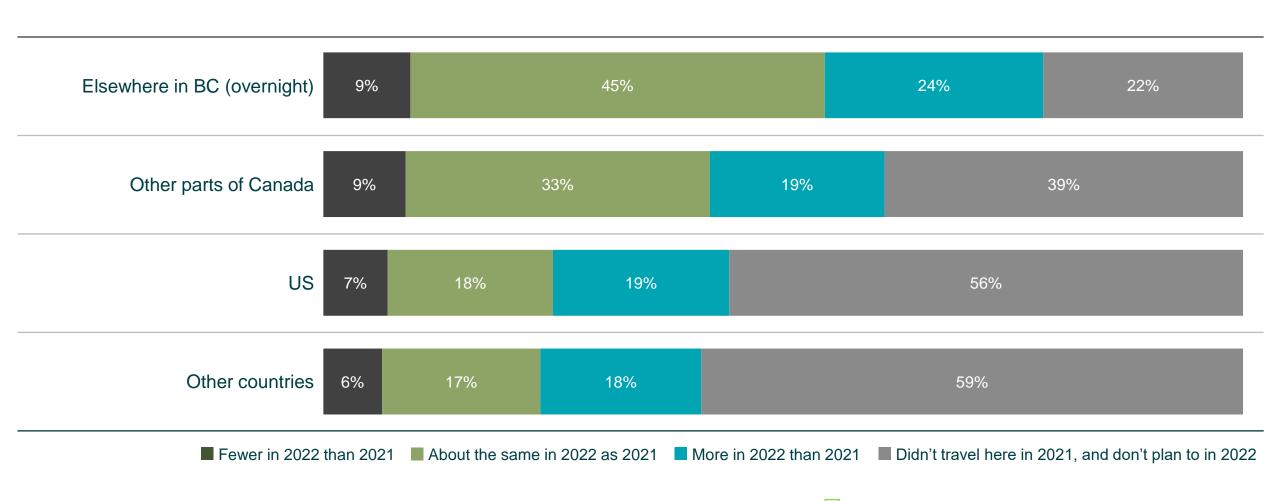
### **CURRENT AD-HOC FINDINGS**



### Likely 2022 Travel Compared to 2021

(Wave 41 – Jan 7, 2022)





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

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



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



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

81%

27%

28%

68%

42%

Female





(Wave 42 – Jan 7, 2022)

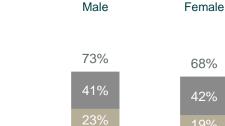
(day trip)

Elsewhere in BC

(overnight)

Other

parts of Canada



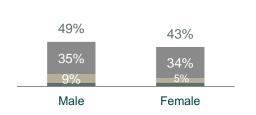
10%

Male

81%

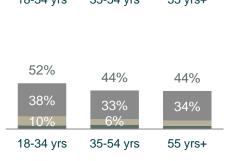
25%

30%



Gender







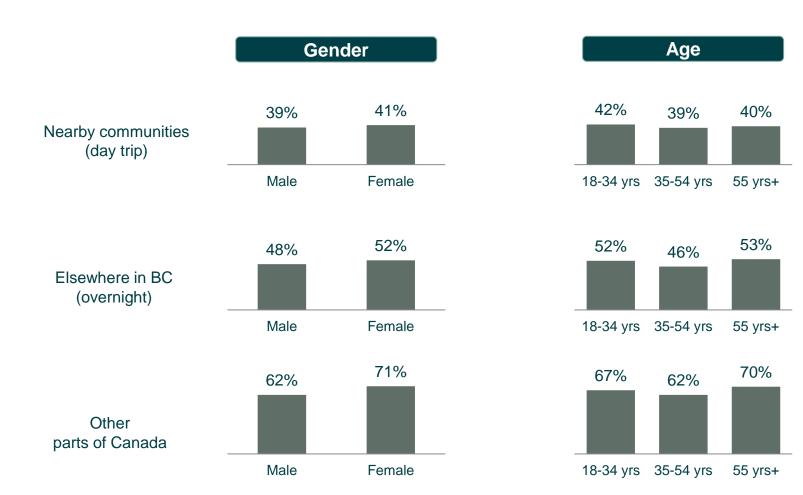


Statistically significantly <u>higher</u> than comparison group(s). Statistically significantly **lower** than comparison group(s).

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



(Total Very/Somewhat Concerned, Wave 42 – Jan 7, 2022)





trips into your community over the next few weeks?



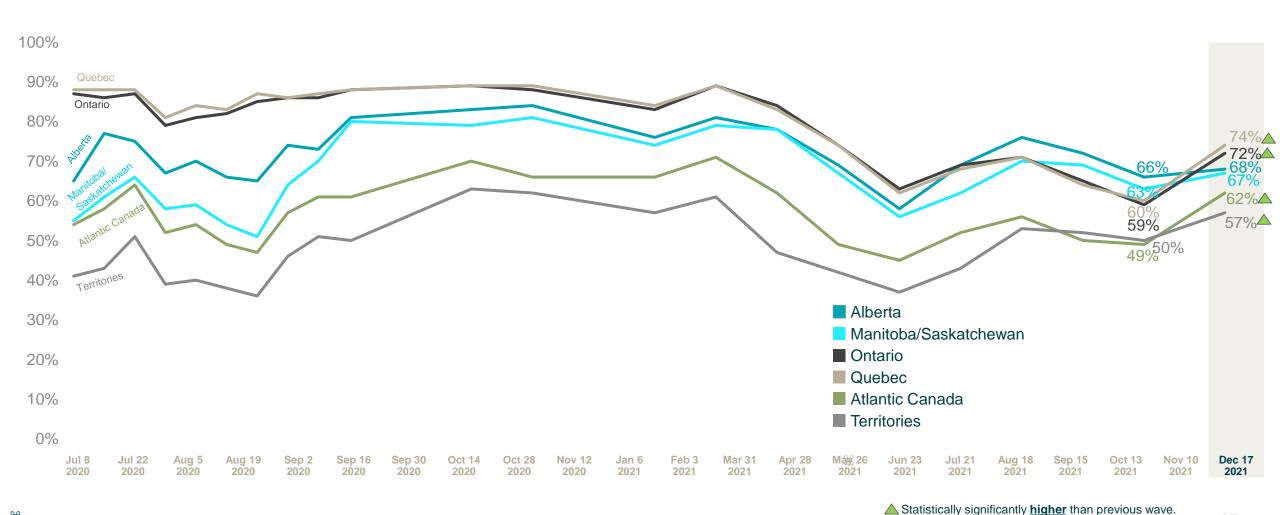
### **APPENDIX: PAST AD-HOC FINDINGS**



### Tracking British Columbians' Concern Welcoming Canadian Visitors



(Total Very/Somewhat Concerned By Origin)



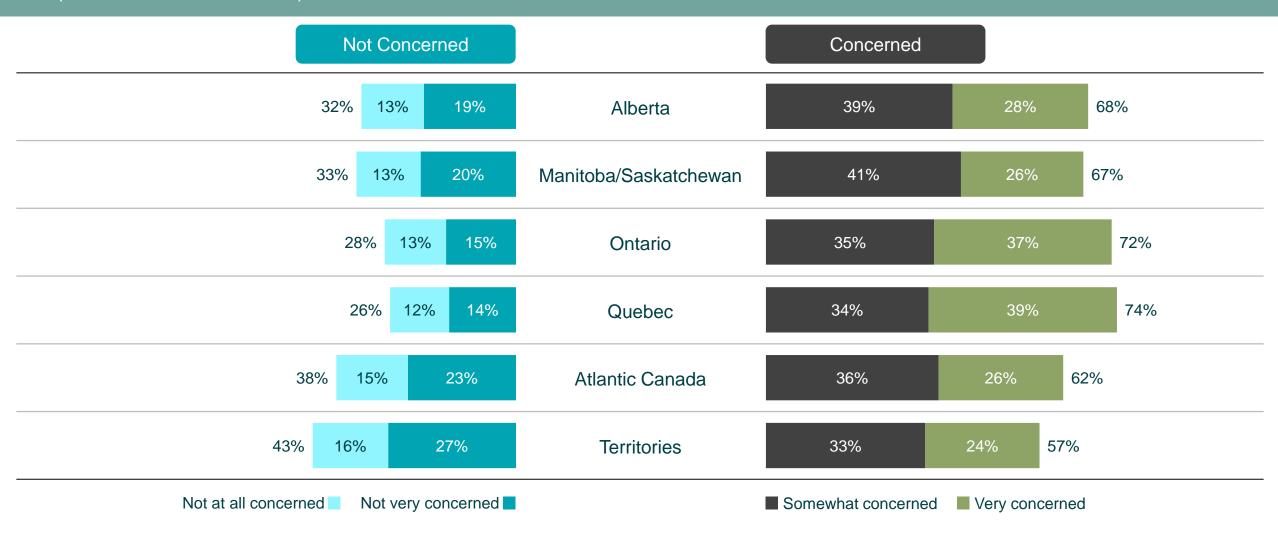
RQuestion frequency changed from bi-weekly to monthly starting November 12, 2021. Base: All respondents

Statistically significantly **lower** than previous wave.

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



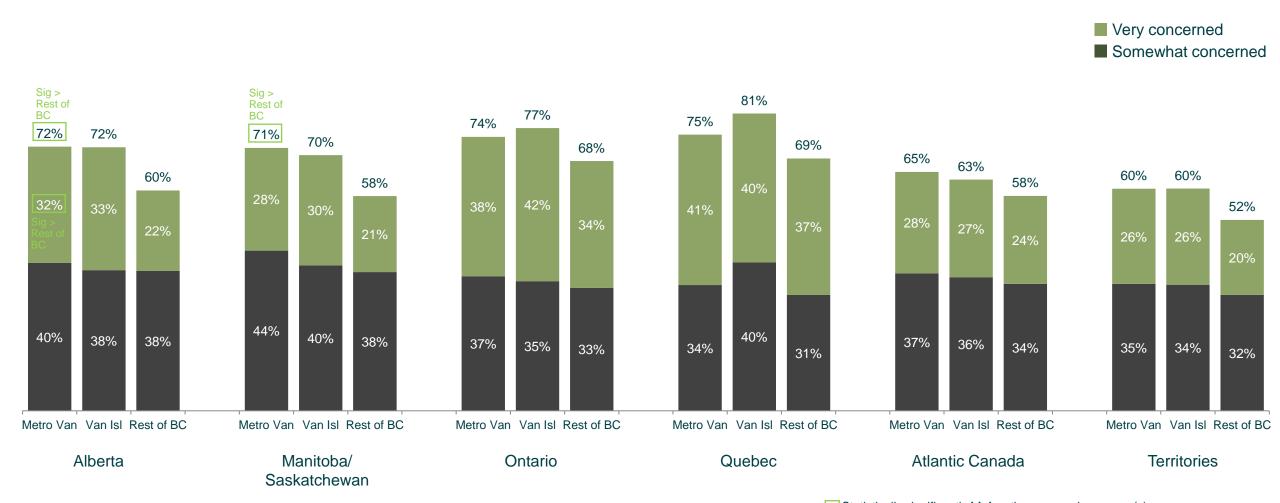
(Wave 41 – Dec 17, 2021)



## 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?

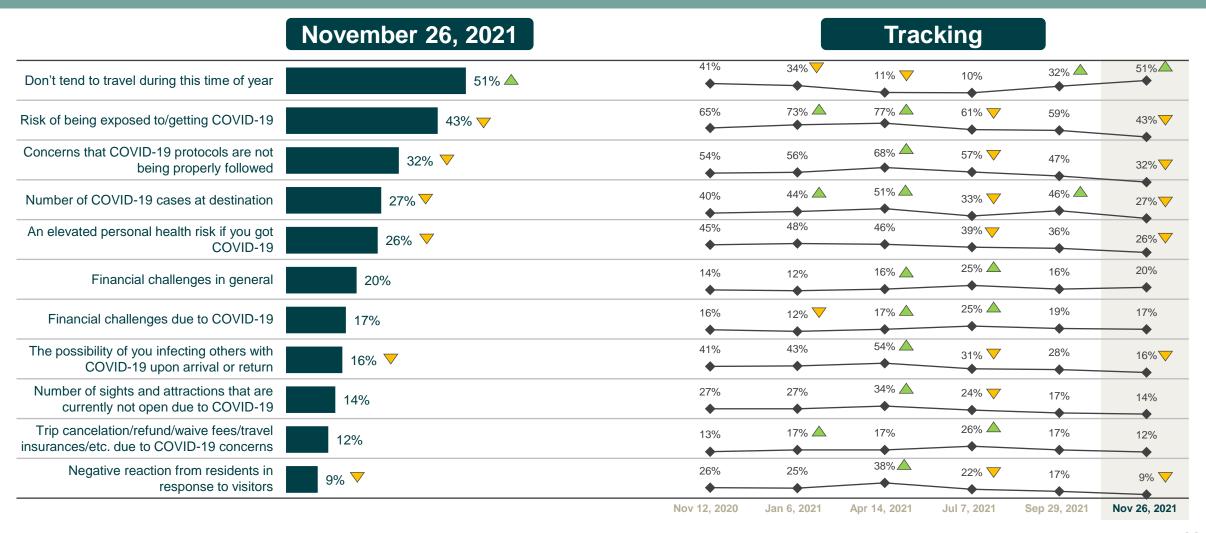
Due to rounding, the sum of the individual values shown may not add up to the total shown.

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

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



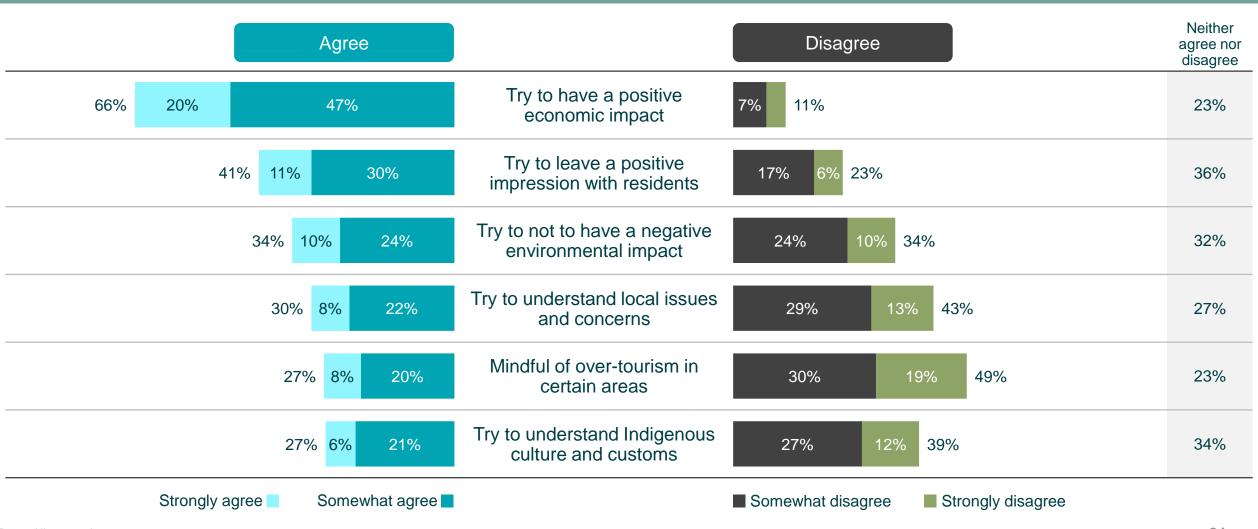
(Among Those Not Intending to Travel in BC in the Next 3 Months)



#### British Columbians' Views On Visitors

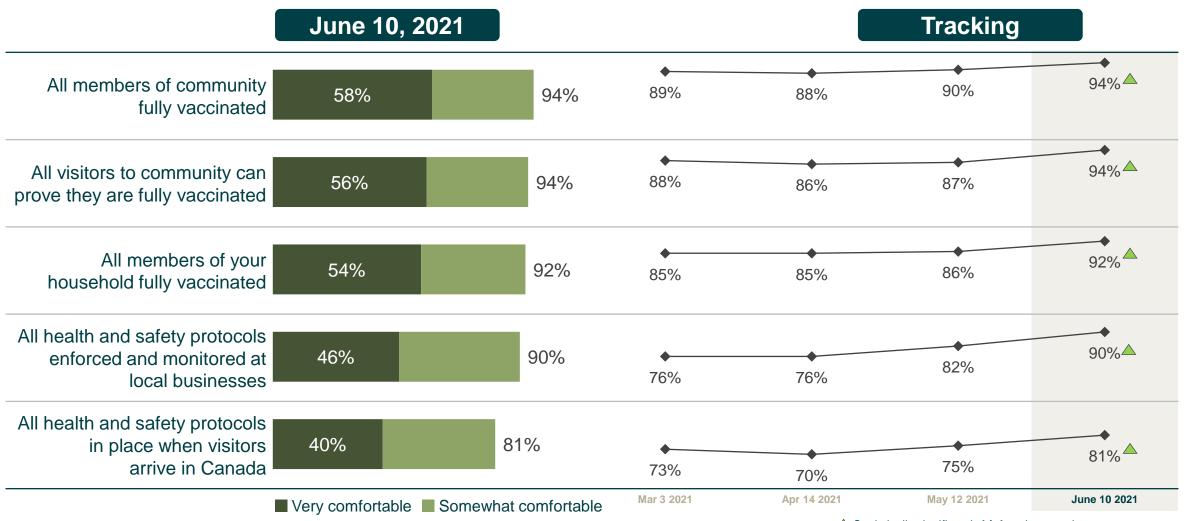


(Wave 32 – August 4, 2021)



### Comfort With Welcoming Visitors Under Various Circumstances

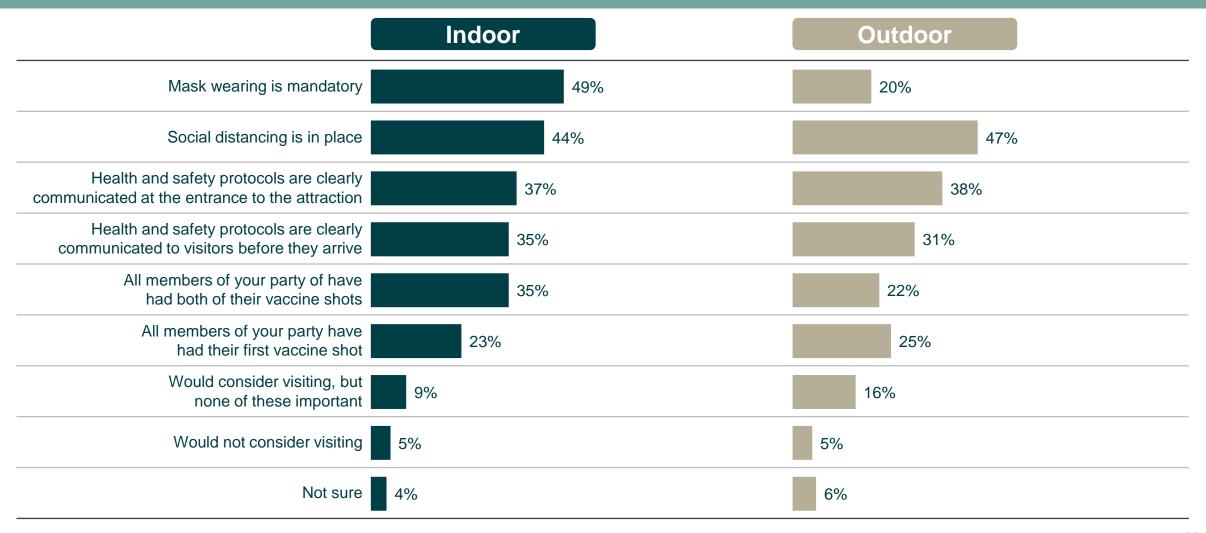




### Important Circumstances In Visiting BC Attractions (Aided)



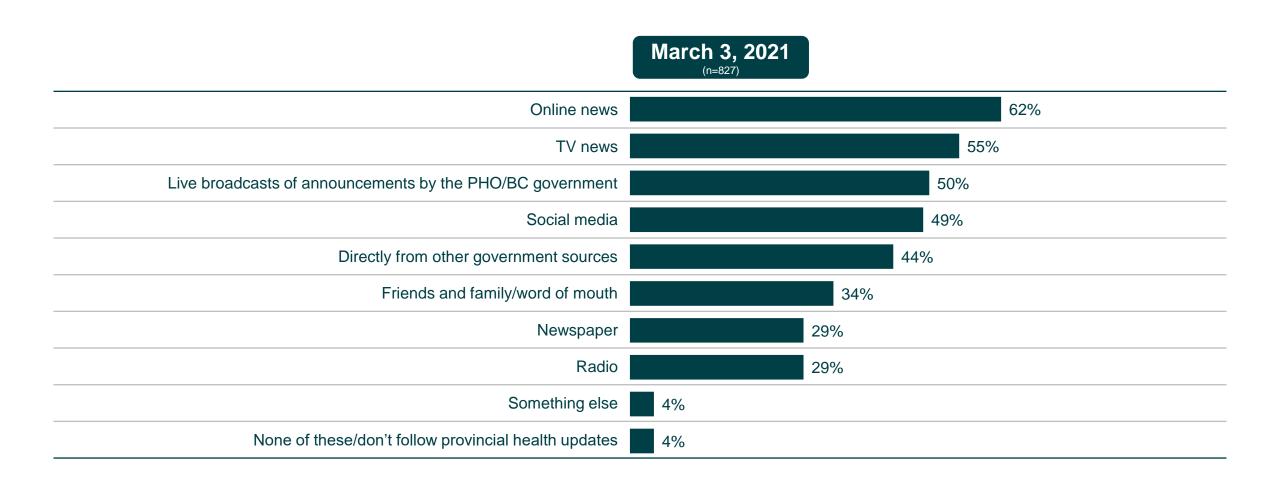
(Wave 29 – June 23, 2021)



### Source Of Provincial COVID-19 Health Updates



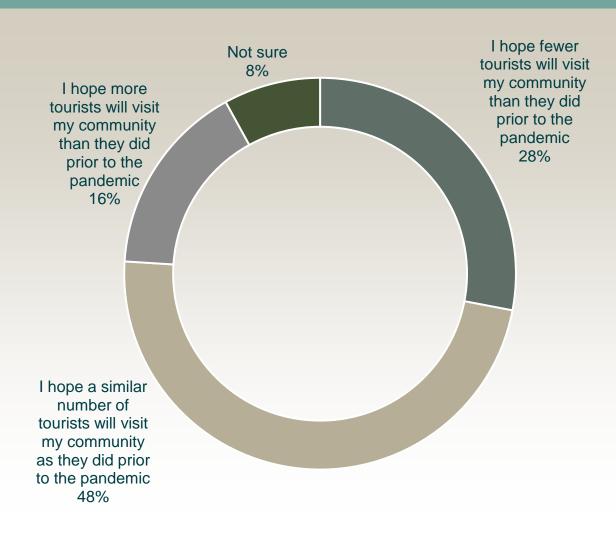
(Wave 21 - March 3, 2021)

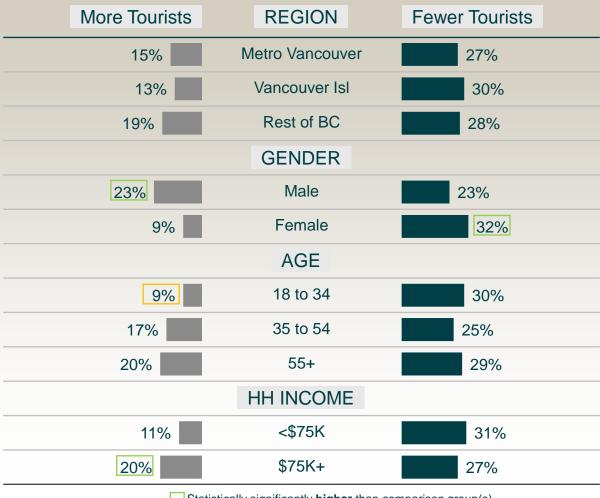


### Preferred Tourism Post-Pandemic

(Wave 27 - May 26, 2021)







Statistically significantly <u>higher</u> 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:

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