

COVID-19 B.C. TRAVELLER BEHAVIOUR & SENTIMENT

SURVEY RESULTS

MAY 2020

WHAT WE'RE SEEING



- The majority of British Columbian (BC) travellers are planning to take at least one leisure trip in the remainder of 2020.
- Of the 78% of BC travellers who said they are taking a leisure trip anywhere this year, 3 in 5 of those said they would be visiting Squamish at least once in the remainder of 2020 for either a day or overnight leisure trip.
- Of those visiting Squamish, almost half plan to stay overnight and are planning to sightsee, hike, visit the Sea to Sky Gondola, visit friends & family and mountain bike.
- Amongst leisure trips BC travellers are taking in 2020, Squamish is more likely to be a day trip than other destinations. Those staying overnight are more likely to have a shorter stay of 1 - 2 nights.
- COVID-19 business operational procedures are expected by all respondents for both indoor and outdoor business settings. The majority of respondents said they would withhold future purchases from businesses who did not make them feel confident that the business was looking out for their health.
- B.C. travellers are ready to undertake some travel again, yet are cautious about indoor settings.
- Squamish residents are comfortable with the local economy reopening, yet still have a level of discomfort with visitors coming to Squamish.

WHAT THIS MEANS

Many B.C. residents plan on visiting Squamish in the coming months, with most indicating they will visit for the day or for a short stay.

- Does your product appeal to a local and B.C. predominant market?
- Does your product appeal to day visitors and short stays?
- If Squamish residents are not always your customers, have you considered marketing to Squamish and Sea to Sky residents?
- Have you considered partnering with other complimentary Squamish businesses for marketing efforts? E.g. joint email communication, blogs, contests, short stay packages?

All respondents indicated COVID-19 measures should be used for indoor and outdoor business settings. Having COVID-19 business operational procedures in place is essential.



- Are your COVID-19 measures clear and easy to understand?
- Are your staff prepared if visitors enquire about your COVID-19 measures?
- Have you added your COVID-19 operational procedures to your website/social channels/visitor communication?
- Have you considered creating a short video or images explaining to customers/visitors what they can expect?

For businesses with products that can be booked or reserved, visitors are looking for flexible booking and cancellation policies.

- If you take reservations or bookings, are you providing flexible booking/cancellation terms?
- If you do not currently, can you offer online reservations/time slots to manage customer volumes and expectations?
- Are there new online distribution channels you can add your product to?

BC residents are currently more comfortable in outdoor settings.

- If you don't offer an outdoor product, are there ways your business can operate outside/partially outside? E.g. patios, storefronts etc.
- If your product can be sold online, have you considered an online store?

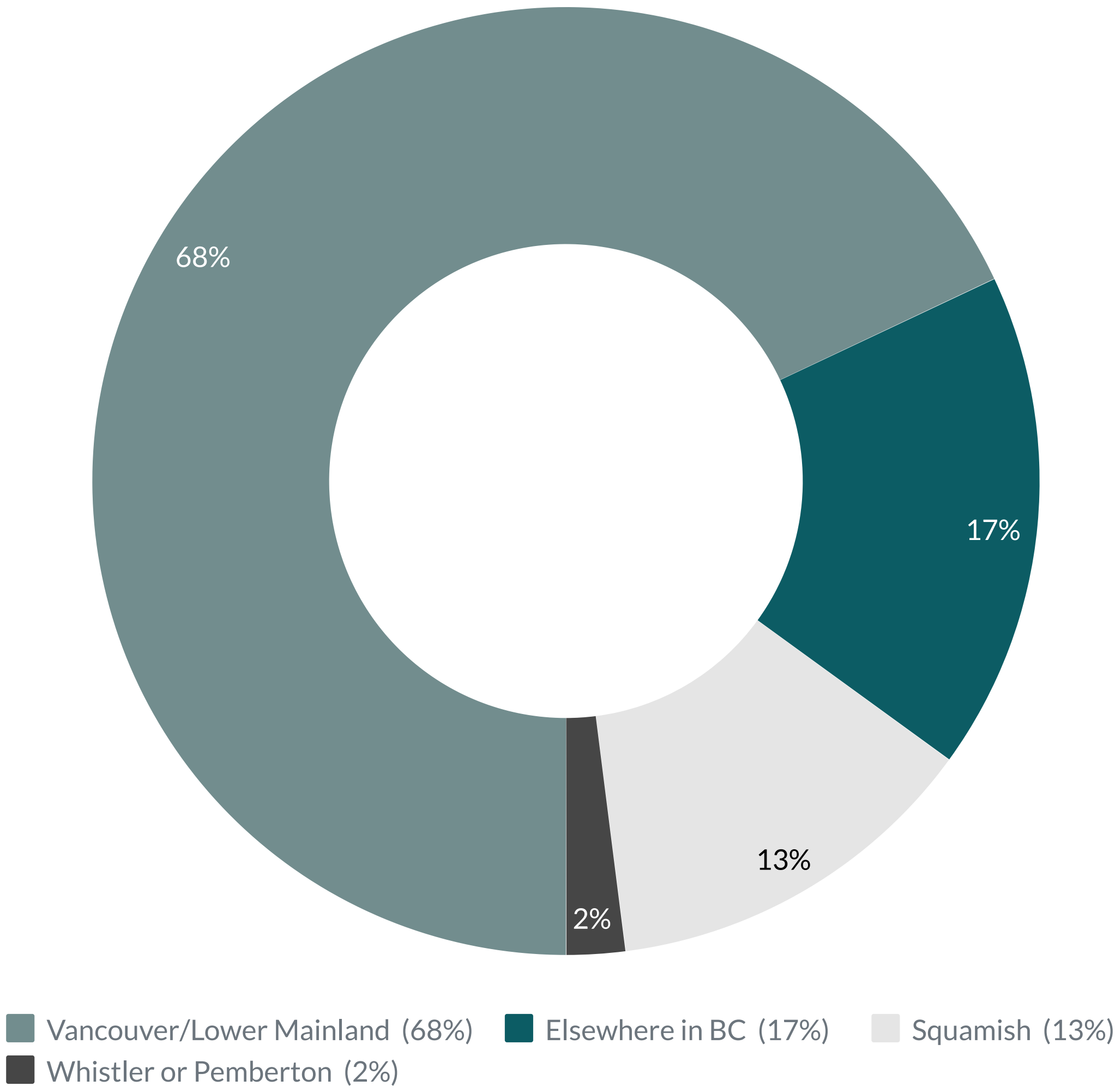
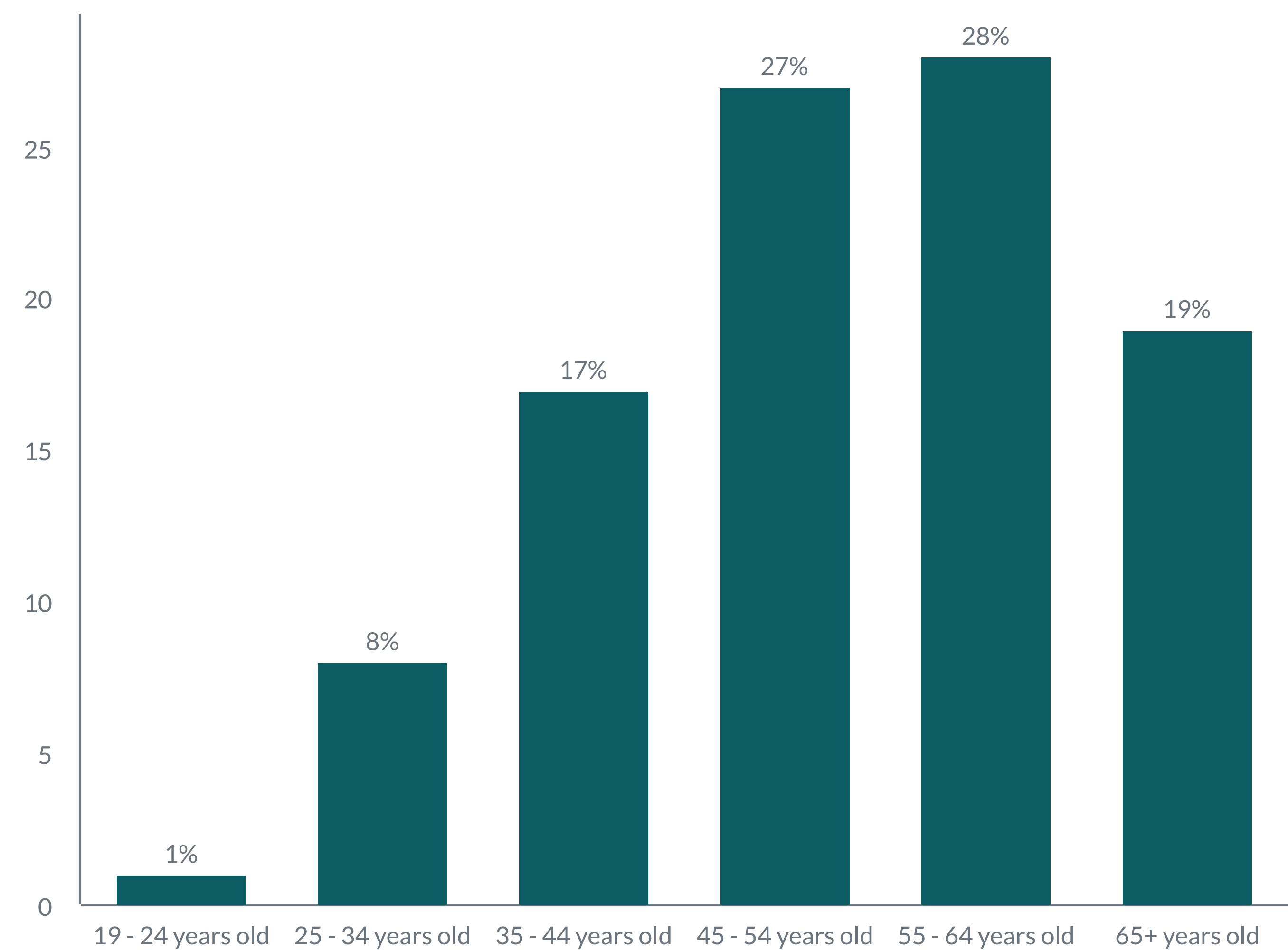
METHODOLOGY



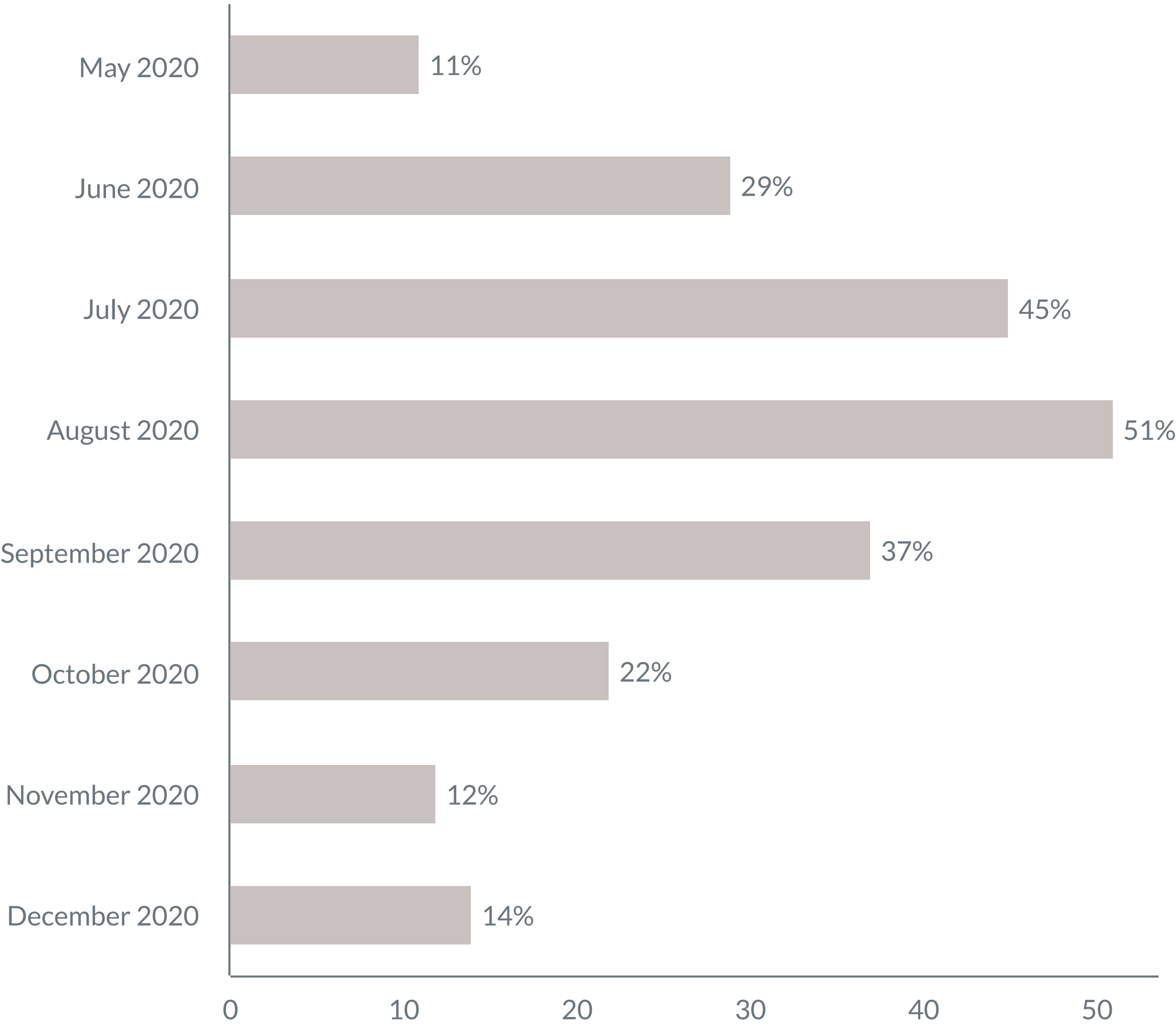
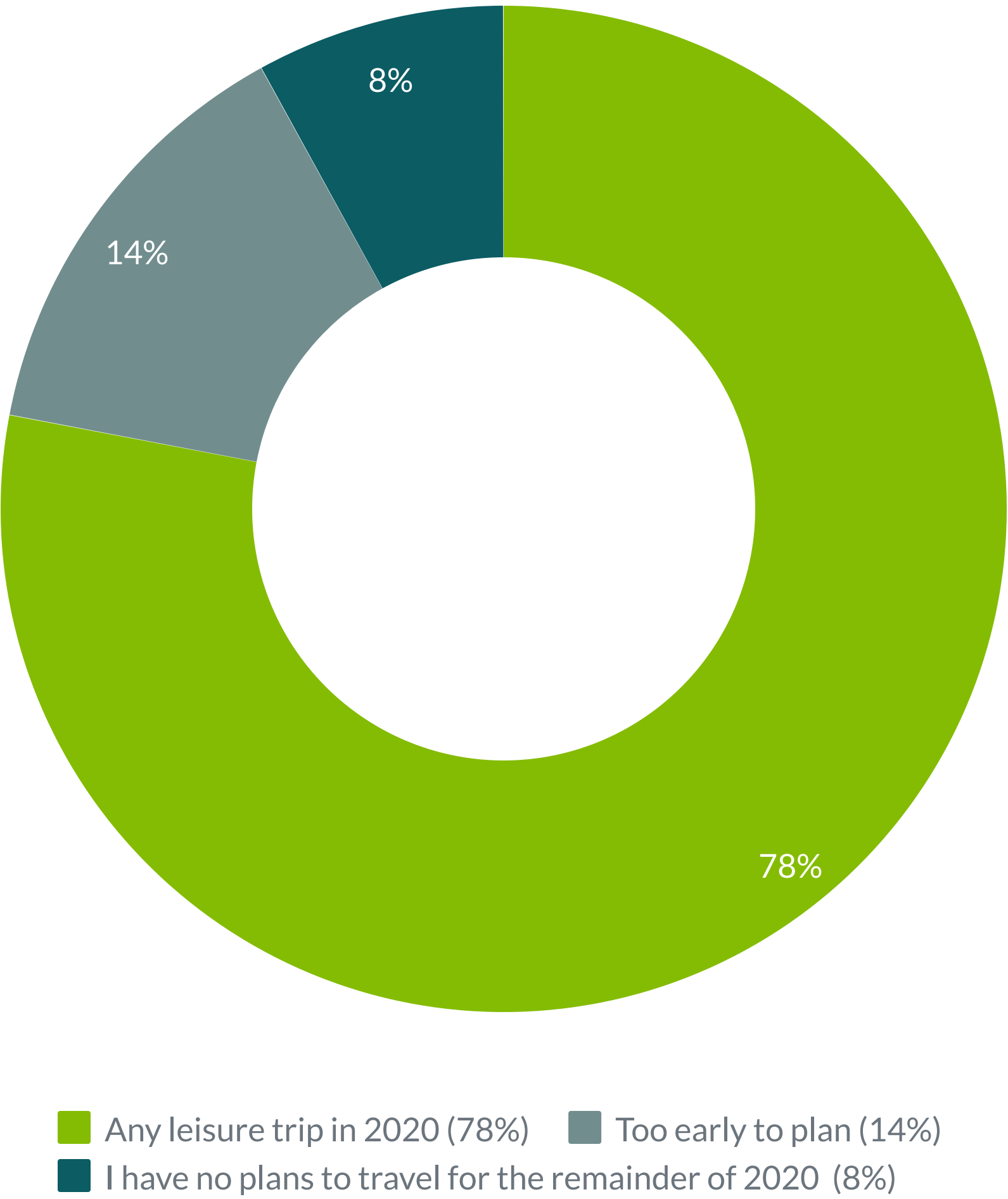
- A survey measuring traveller sentiment and travel behaviour regarding COVID-19 was sent on May 15, 2020 to Tourism Squamish's newsletter subscribers. The survey closed on May 21, 2020. To qualify for the survey respondents must have travelled for leisure in the last 12 months.
- A sample of 1,204 responses were collected or a 6% response rate. Due to the large number of respondents being from British Columbia (n=949), survey results focus on British Columbian (B.C.) respondents only.
- BC is one of Squamish's key markets, in summer 2019, 35% of visitors to Squamish were from BC (29% of those Vancouver/Lower Mainland). Furthermore, the BC market and in particular, Vancouver/Lower Mainland visitors are critical to Squamish during the reopening of the B.C. economy from the COVID-19 pandemic.
- Once respondents completed the survey, they were asked if they'd like to be entered to win a CAD \$100 gift card.

DEMOGRAPHICS

- Among respondents, 68% are from Vancouver/Lower Mainland (n=644), 17% Elsewhere in B.C. (n=162), 13% Squamish (n=129) and 2% Whistler or Pemberton (n=14).
- Over half (55%) of respondents were aged 45 – 64 years old, another quarter (25%) were aged 25 – 44 years old and 71% were female.



PLANNED 2020 LEISURE TRIPS ANYWHERE



The majority of B.C. travellers are planning to take at least one leisure trip in the remainder of 2020.

- Many BC travellers are planning to travel for the day or overnight for leisure, with 78% saying they are taking one or more leisure trips in the remainder of 2020.
- Only eight percent do not have any leisure trips planned for the remainder of 2020, with another 14% stating it is too early to plan.
- The majority of planned leisure trips align with summer 2020, with 51% of respondents taking at least one leisure trip in August, 45% in July and 37% in September. 14% of BC travellers have leisure trips planned for December, 2020.

Question: Even if only tentatively scheduled, in which months of this year do you currently plan to take any leisure trips (day trip or overnight)? Select all that apply (n=949)

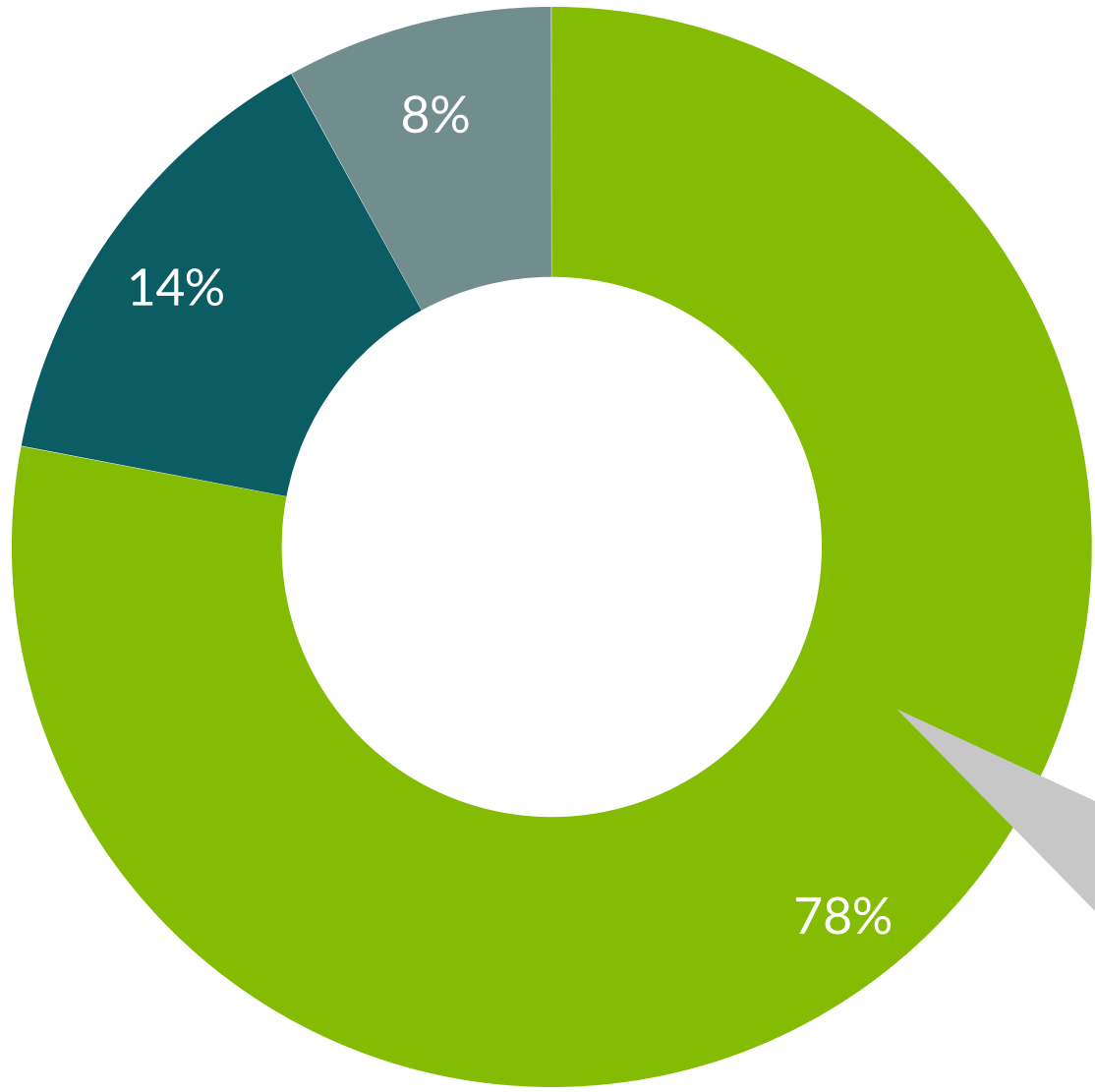
PLANNED 2020 SQUAMISH LEISURE TRIPS*

***Excludes Squamish, Whistler & Pemberton residents**

Of the more than three quarters (78%) of BC travellers who said they are taking a leisure trip this year, 3 in 5 of those said they would be visiting Squamish at least once in the remainder of 2020 for either a day or overnight leisure trip.

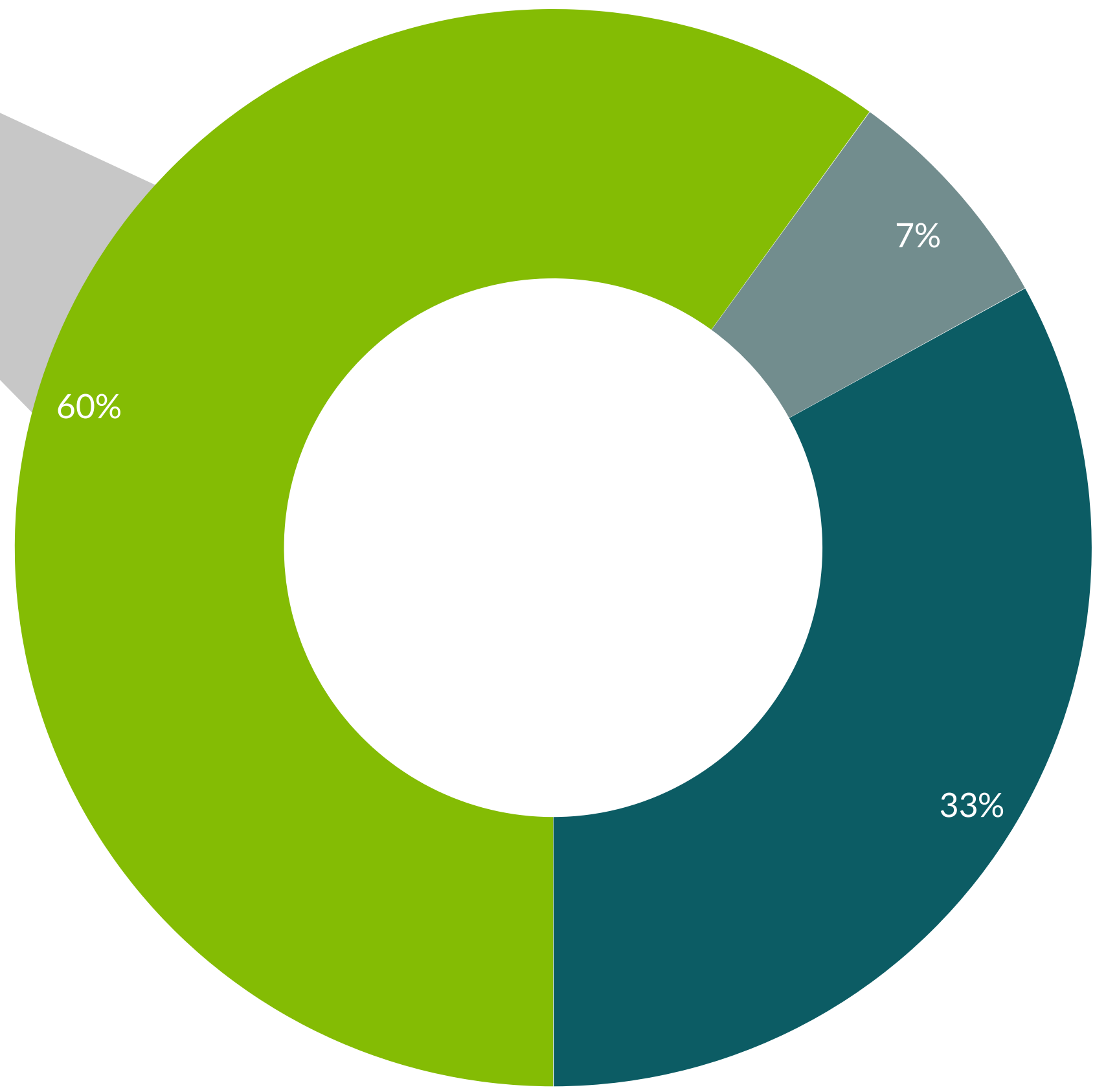
- Another third (33%) are unsure, with only seven percent of those taking a leisure trip this year saying they won't be visiting Squamish at some point.
- Those from Vancouver/Lower Mainland are much more likely to have already decided to visit Squamish, whereas over half (51%) of respondents from elsewhere in BC are unsure.
- Almost all respondents (95%) have visited Squamish before.

Any leisure trip planned for remainder of 2020 by BC travellers



Any leisure trip in 2020 (78%)
Too early to plan (14%)
I have no plans to travel for the remainder...

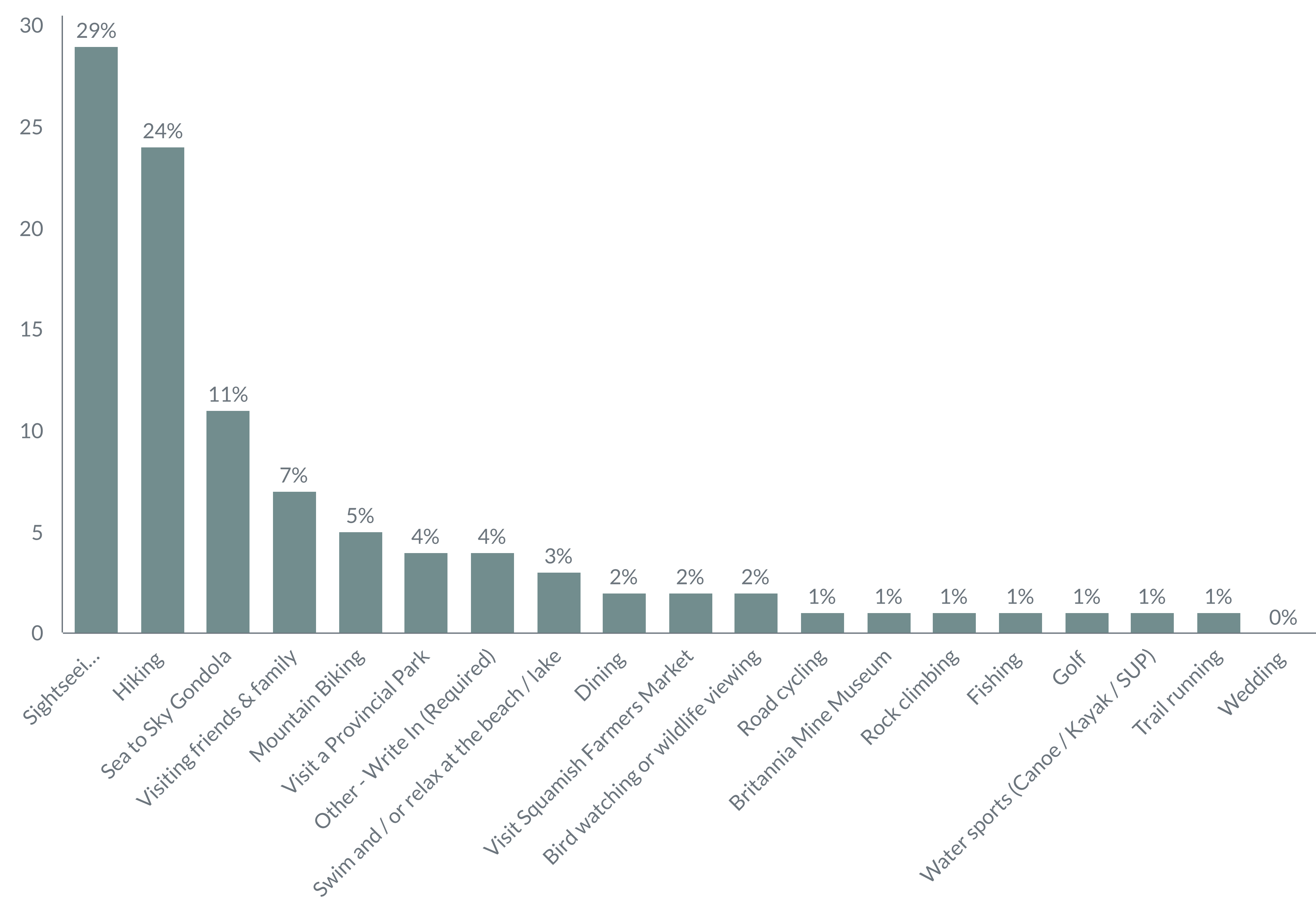
Of those taking a leisure trip, those visiting Squamish at least once in the remainder of 2020*



Yes, visit Squamish (60%) No (7%) Unsure (33%)

Question: Do you plan to visit Squamish (day trip or overnight) for a leisure trip in the remainder of 2020? (n=639)

PURPOSE OF SQUAMISH VISIT



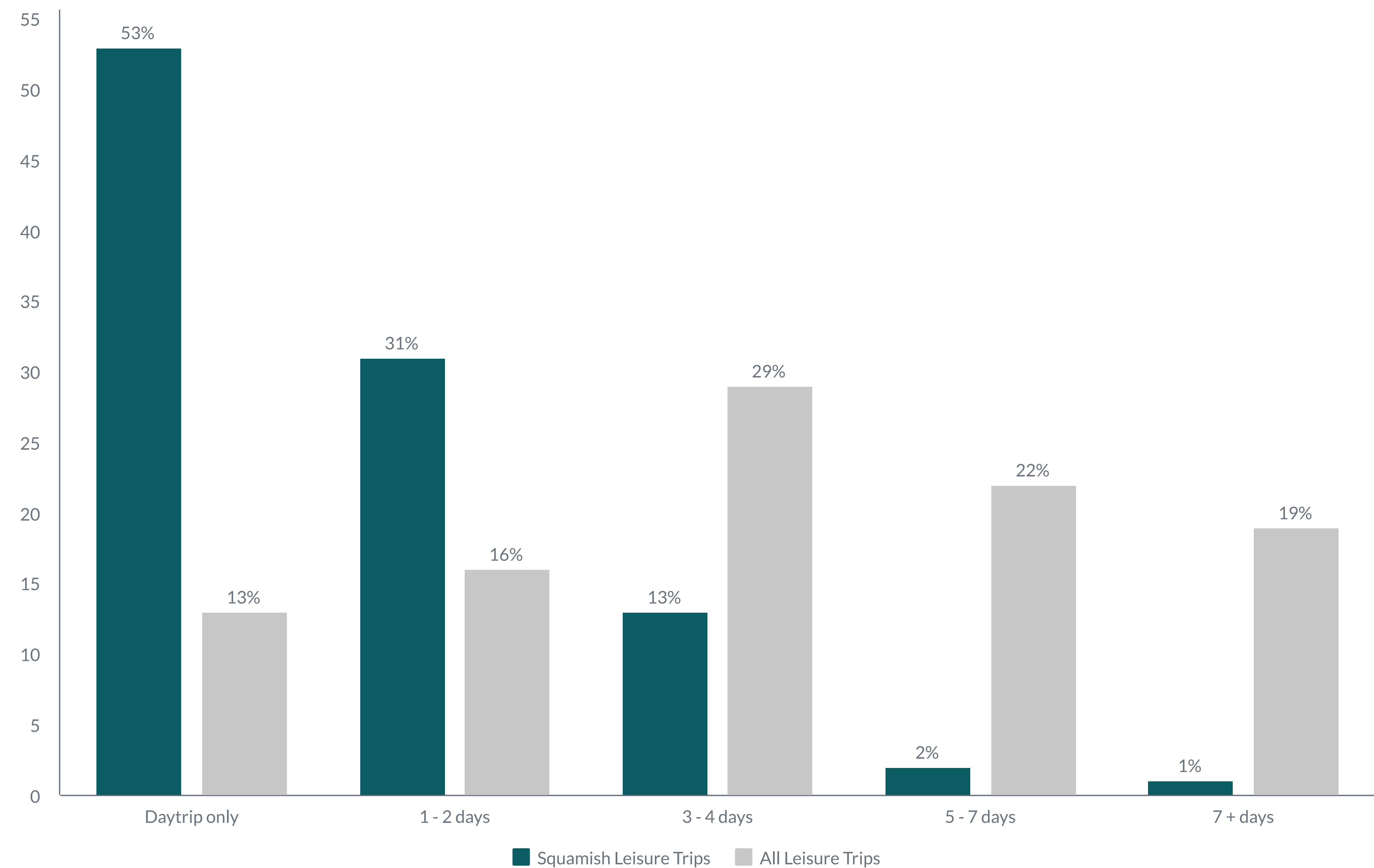
- The top 5 main purposes for visiting Squamish for the remainder of 2020 include general sightseeing (29%), hiking (24%), Sea to Sky Gondola (11%), visiting friends and family (7%) and mountain biking (5%).
- Those visiting from Vancouver/Lower Mainland are much more likely to be hiking than those visiting from Elsewhere in BC. Where as those visiting from Elsewhere in BC are more likely to be visiting friends and family than Vancouver/Lower Mainland visitors.

Question: What will be the main purpose for your visit to Squamish? (n=383)

PLANNED 2020 SQUAMISH LEISURE TRIPS LENGTH OF STAY

Amongst leisure trips BC travellers are taking in 2020, Squamish is more likely to be a day trip than other destinations. Those staying overnight are more likely to have a shorter stay of 1 - 2 nights.

- Of those visiting Squamish in the remainder of 2020, just over half (53%) will be for a day trip, with the other 47% staying overnight.
- The 47% planning to stay overnight is 11 points higher than those BC residents who stayed overnight in Squamish in summer 2019 (36%)*
- Of those staying overnight, almost two-thirds plan on staying 1 – 2 nights, with only one percent of those staying 7 nights or more.

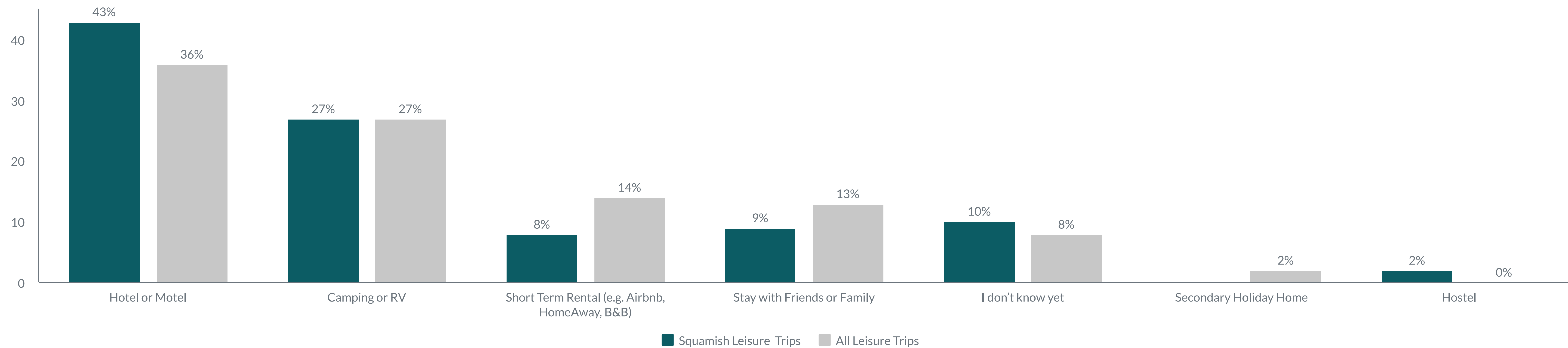


Question: For your next planned trip to Squamish this year, what will be the length of your trip? (Squamish Leisure Trip n= 383) and For your next leisure trip this year, what will be the length of your trip? (All Leisure Trips n=742)

*Source: Tourism Squamish 2019 Summer Visitor Survey

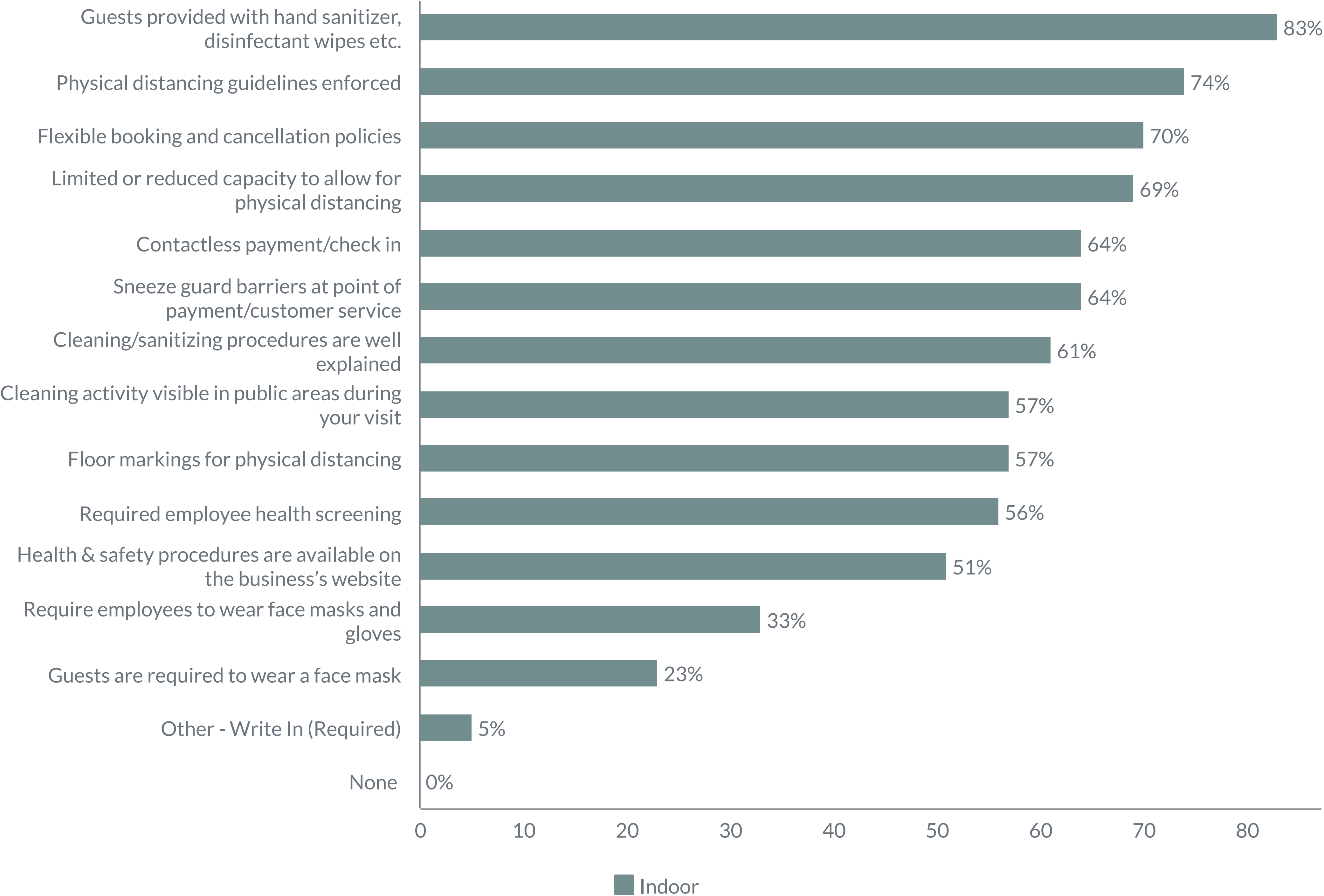
PLANNED 2020 SQUAMISH LEISURE TRIPS ACCOMMODATION

- Just over 2 out of 5 respondents staying overnight in Squamish will stay in a hotel, with another quarter (27%) camping.
- Those staying overnight in Squamish are more likely to be staying in a hotel than those planning other leisure trips in 2020 and less likely to be staying in a short-term rental (e.g. Airbnb).
- 1 in 10 respondents who are staying overnight in Squamish are undecided about the type of accommodation they'll stay in.



Question: Thinking about your next trip to Squamish this year, what type of accommodation will you stay in? (Squamish Trips n=173, All Leisure Trips n=605)

COVID-19 BUSINESS OPERATIONAL PROCEDURES



Question: Which operational procedures do you think should be used for **Indoor Settings** (Accommodation, Restaurants, Retail Stores, Transport etc.)? Select all that apply.

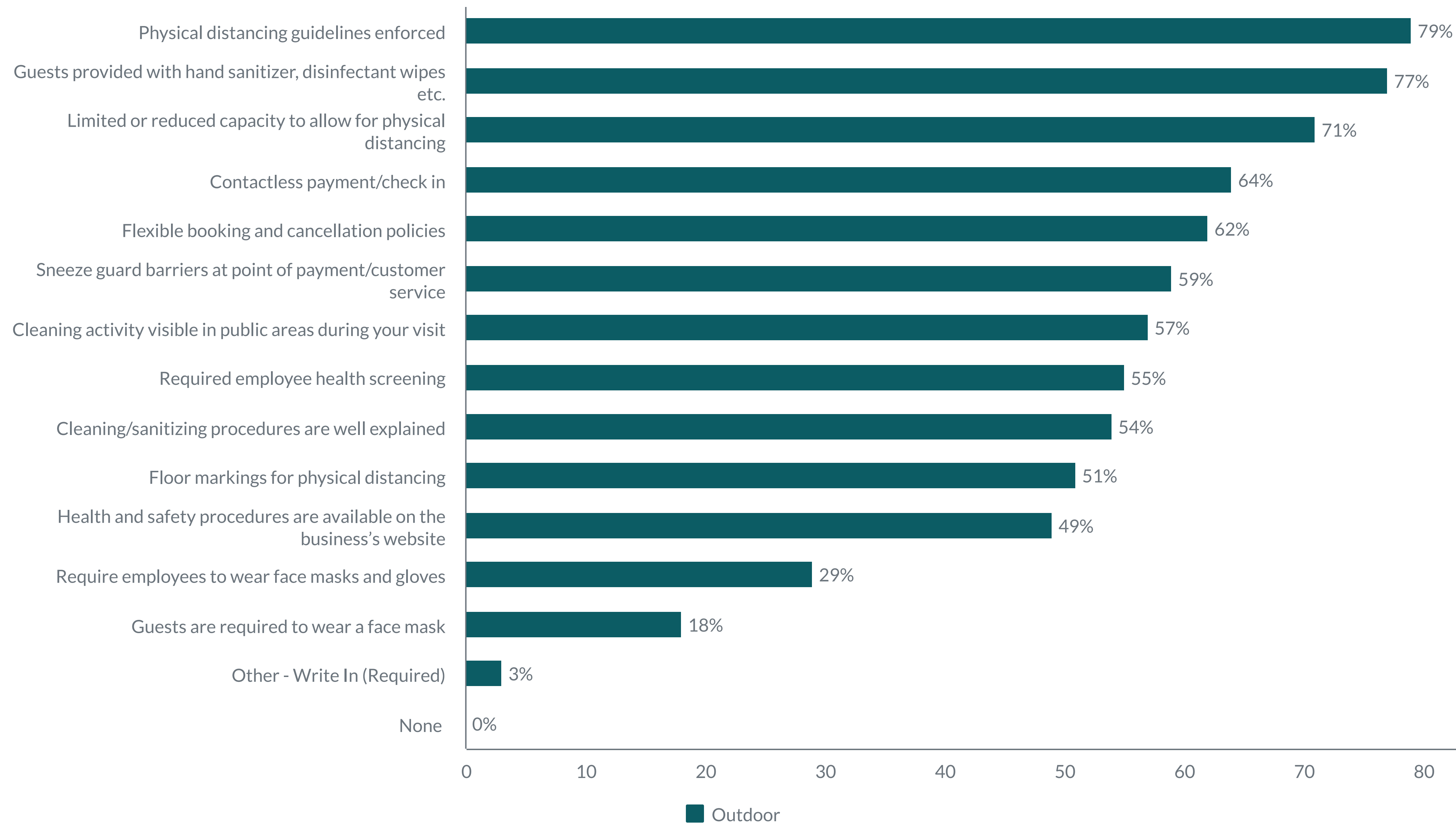
*This question allowed multiple responses to capture all the types of operational procedures, and therefore answers do not sum to 100%.

COVID-19 business operational procedures are expected by all respondents for both indoor and outdoor business settings. The majority of respondents said they would withhold future purchases from businesses who did not make them feel confident that they were looking out for their health.

- All respondents (100%) indicated at least one measure should be used for indoor and outdoor business settings.
- The top 3 measures respondents think should be used for **indoor settings (accommodation, restaurants, retail stores, transport etc.)** include guests provided with hand sanitizer and disinfectant wipes etc. (83%), physical distancing guidelines enforced (74%), flexible booking and cancellation policies (70%).
- Almost three quarters (74%) of respondents indicated patio/outdoor seating should be available for food & beverage outlets.

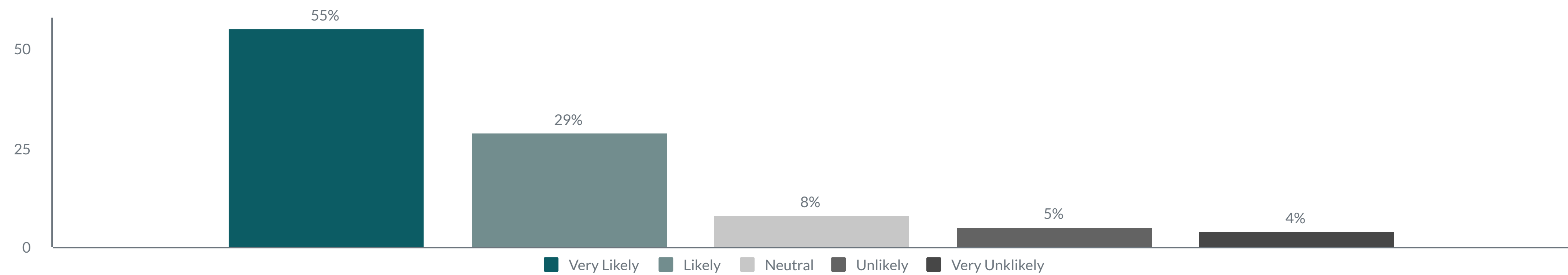
COVID-19 BUSINESS OPERATIONAL PROCEDURES

- Recommended operational procedures were similar for **outdoor settings (attractions, activities, tours etc.)**, the top 3 measures include physical distancing guidelines enforced (79%), guests provided with hand sanitizer and disinfectant wipes etc. (77%), and limited or reduced capacity to allow for physical distancing (71%).
- 84% of respondents said they were likely or very likely to withhold future purchases from a business who did not make them feel confident that they were looking out for their health.



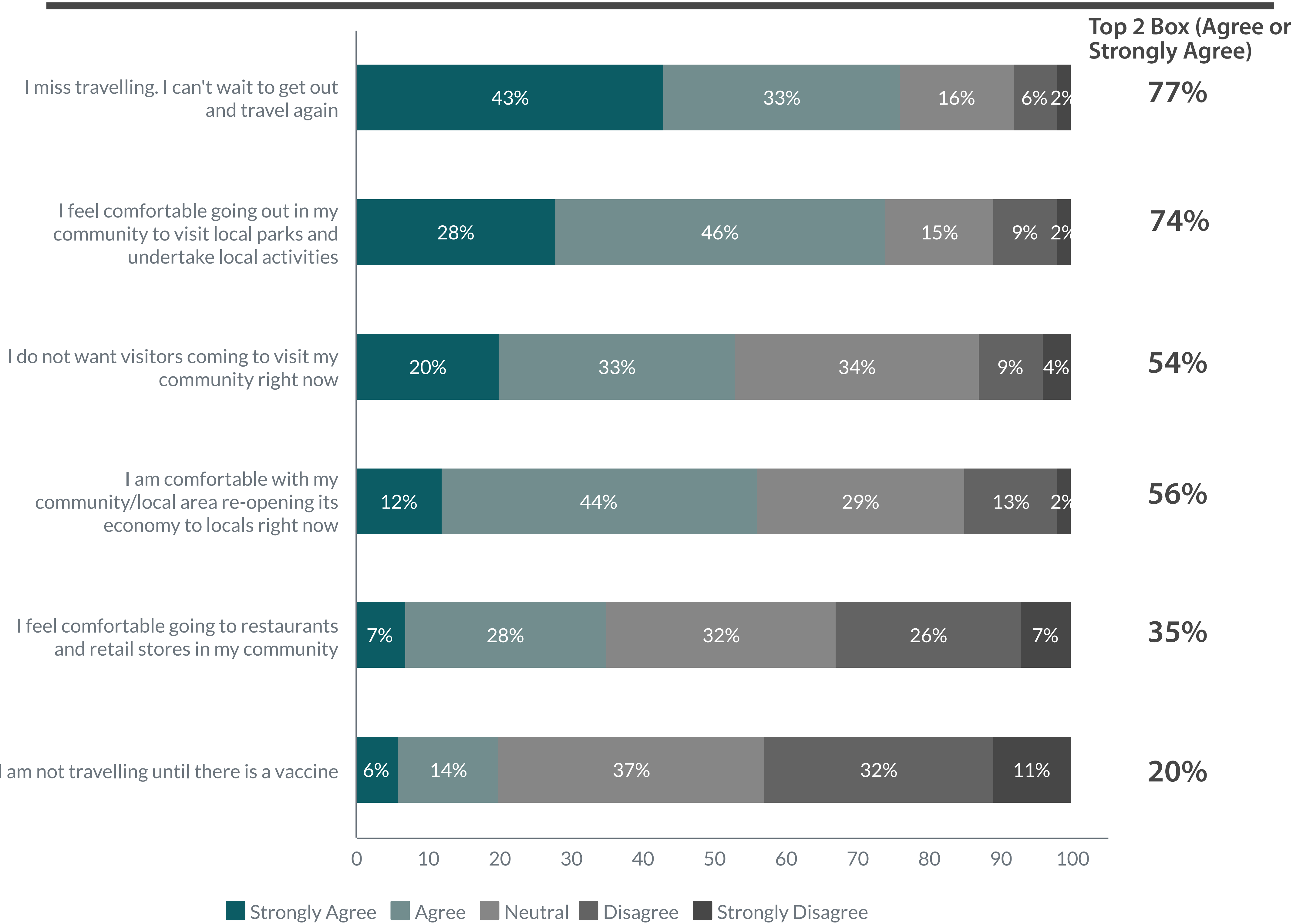
Question: Which operational procedures do you think should be used for **Outdoor Settings** (Attractions, Activities, Tours etc.)? Select all that apply.

*This question allowed multiple responses to capture all the types of operational procedures, and therefore answers do not sum to 100%.



Question: In the coming months, suppose a business (restaurant, retail store, activity provider, hotel etc.) operates in a way that does not make you feel confident that they are looking out for your health. How likely would you be to withhold future purchases from that business? (n=949)

B.C. TRAVELLER SENTIMENT



Question: How much do you agree with the following statements? (n=949)

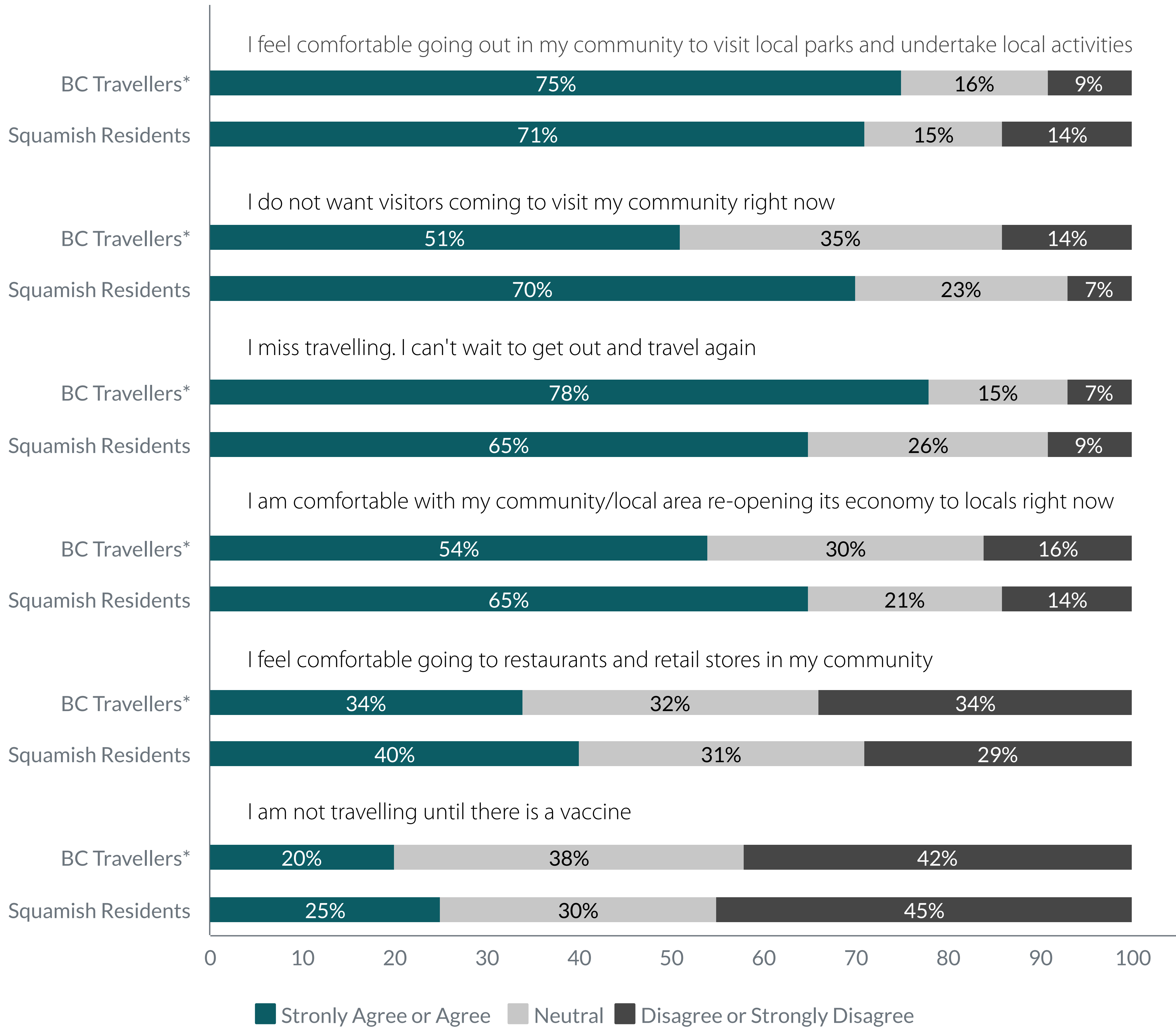
B.C. travellers are ready to undertake some travel again, yet are caution about indoor settings.

- The desire for travel remains strong with 77% of BC travellers either agree or strongly agree that they miss travel and can't wait to get out and travel again.
- Over one third (37%) are undecided, yet only 20% agree or strongly agree that they will wait until there is a vaccine before travelling.
- BC travellers level of comfort with visiting restaurants and retail stores is still yet to recover with only 35% comfortable visiting restaurants and retail stores.
- Yet, almost three quarters (74%) are comfortable visiting parks and undertaking local activities.

SQUAMISH RESIDENT SENTIMENT

Squamish residents are comfortable with the local economy reopening, yet still have a level of discomfort with visitors returning to Squamish.

- Almost three quarters (71%) of Squamish residents are comfortable visiting local parks and undertaking local activities, yet only 2 in 5 are currently comfortable going to restaurants and retail stores in Squamish.
- Squamish residents are comfortable reopening the local community/economy to locals only right now (65% agree or strongly agree), however Squamish residents are less comfortable with the return of visitors right now, with 70% agreeing or strongly agreeing that they are not comfortable with visitors to Squamish, 19 points higher than other B.C. residents (51%).



Question: How much do you agree with the following statements? (BC Traveller n=820, Squamish Resident n=129)

*Excludes Squamish Residents

QUESTIONS?

For further information on this study,
please contact **courtney@tourismsquamish.com**

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