



DESTINATION
BRITISH COLUMBIA®

BC Residents' Public Perceptions:
COVID-19 Travel and Tourism
Wave 38: October 27, 2021

Report prepared by Insights West

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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 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 via an omnibus (shared study).
- Data is weighted by age, gender, region and past voting behaviour 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%

KEY HIGHLIGHTS – WHAT’S NEW OR CHANGED



TRAVEL INTENTIONS (SLIDES 6-10)

- British Columbians’ intent to travel for overnight trips has remained mostly flat over the past month. However, compared to this same time period last year, travel intentions are higher for all trip types in both the next 4 week and 2-3 month intervals measured.
- Compared to last wave, BC residents intent to travel to nearby communities for a day trip increased +6 points to 57% within the next 4 weeks and increased +7 points to 75% within the next 2-3 months.

CONCERN WELCOMING VISITORS (SLIDES 11-13)

- BC residents’ concern welcoming visitors from various areas continued to decrease this wave. Concern with welcoming visitors from both the US and overseas is now at a historical low for this study.
- The biggest decreases in concern are towards visitors from nearby communities (down -7 points to 31%) and from other provinces in Canada (down -7 points to 58%).

KEY HIGHLIGHTS – WHAT’S NEW OR CHANGED



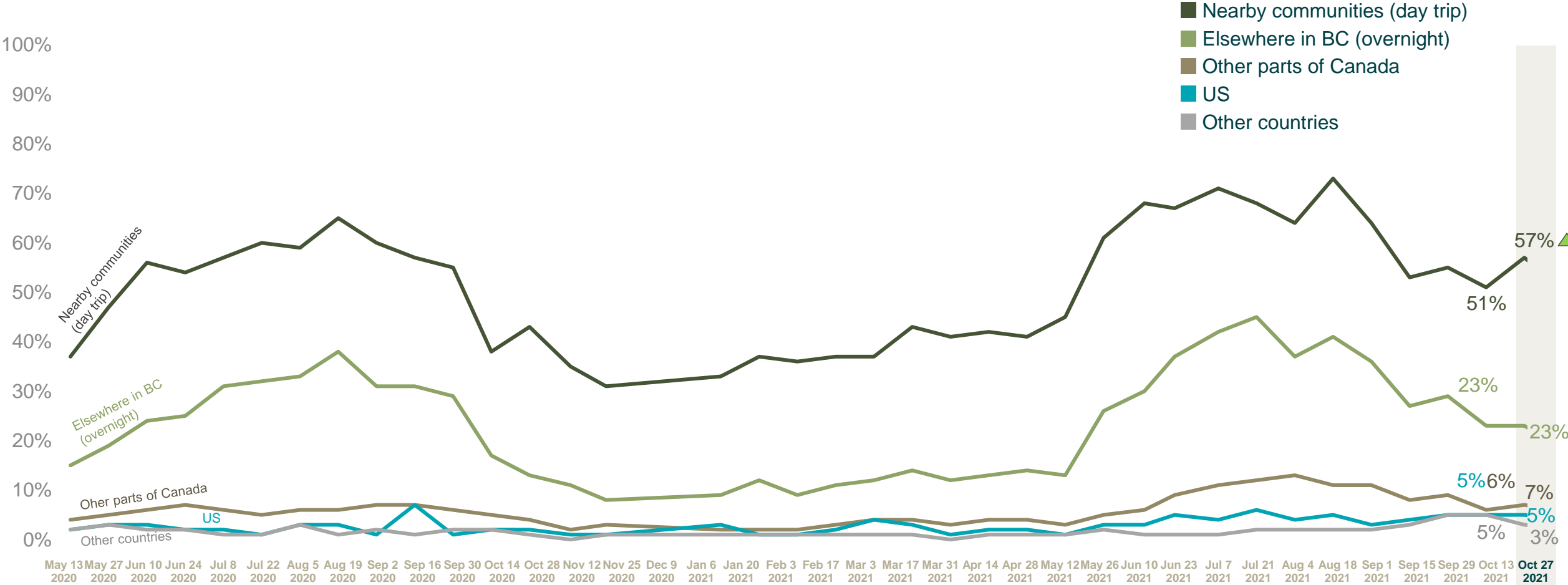
COMFORT WITH ACTIVITIES/MODES OF TRANSPORTATION (SLIDES 14-18)

- In keeping with other metrics this wave, comfort levels with various activities increased this wave; results are statistically significantly higher for every activity with the exception of cruises where comfort remains low, but has gone up directionally. As a result, comfort levels are at or near historical highs for this study for all activities, transportation, and accommodation types.
- The biggest increases in comfort are for the following:
 - Indoor tourist attractions increased +7 points to 68%.
 - Non-essential ferry travel increased +7 points to 77%.
 - Non-essential air travel increased +7 points to 53%.
 - Staying at a hotel/motel increased +9 points to 75%.
 - Staying at sharing economy accommodations increased +6 points to 63%.

TRAVEL INTENT

Tracking British Columbians' Travel Intent Within Next 4 Weeks

(By Destination)

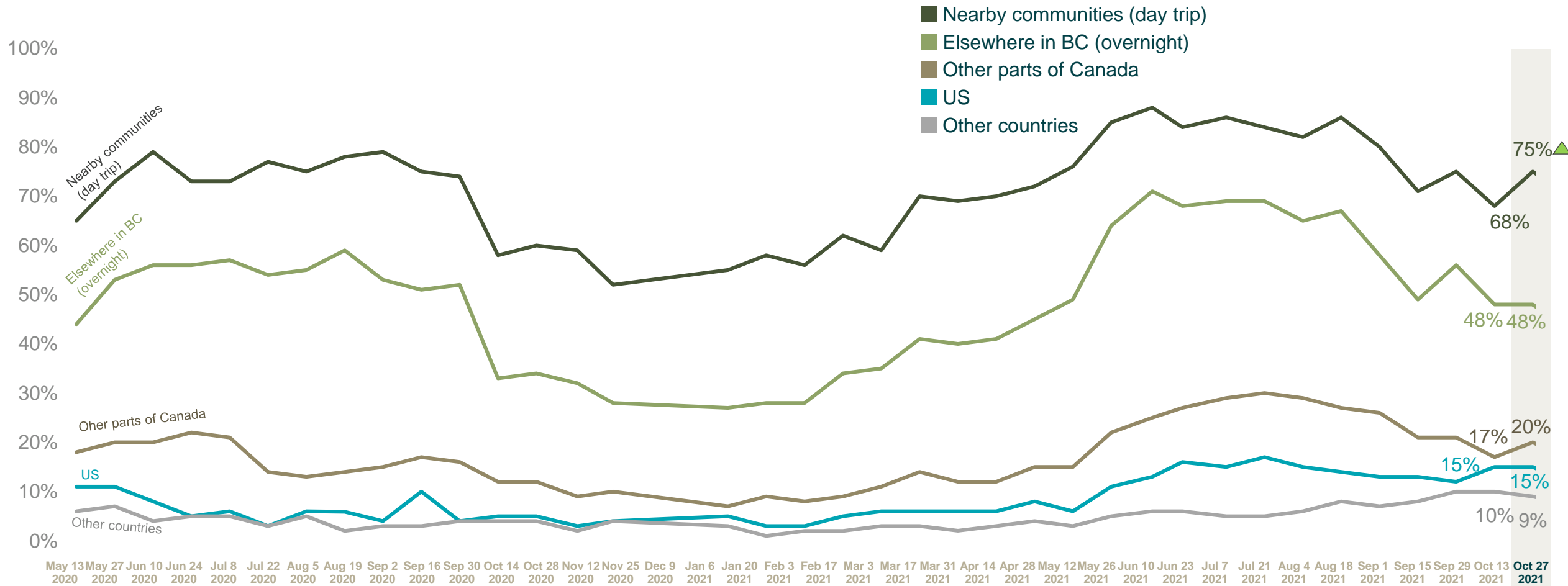


▲ Statistically significantly **higher** than previous wave.
 ▼ Statistically significantly **lower** than previous wave.

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?

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

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

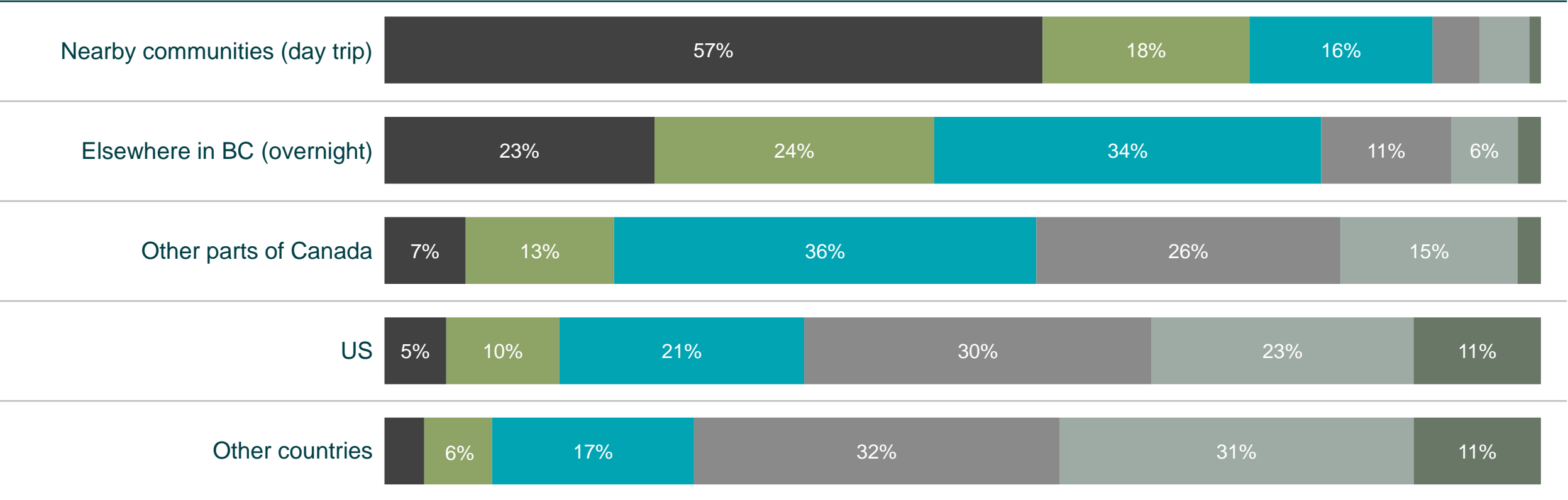
Due to rounding, the total may not equal 100% to the sum of individual values shown.

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

▼ Statistically significantly **lower** than previous wave.

Snapshot Of British Columbians' Travel Intentions

(Wave 38 – Oct 27, 2021)

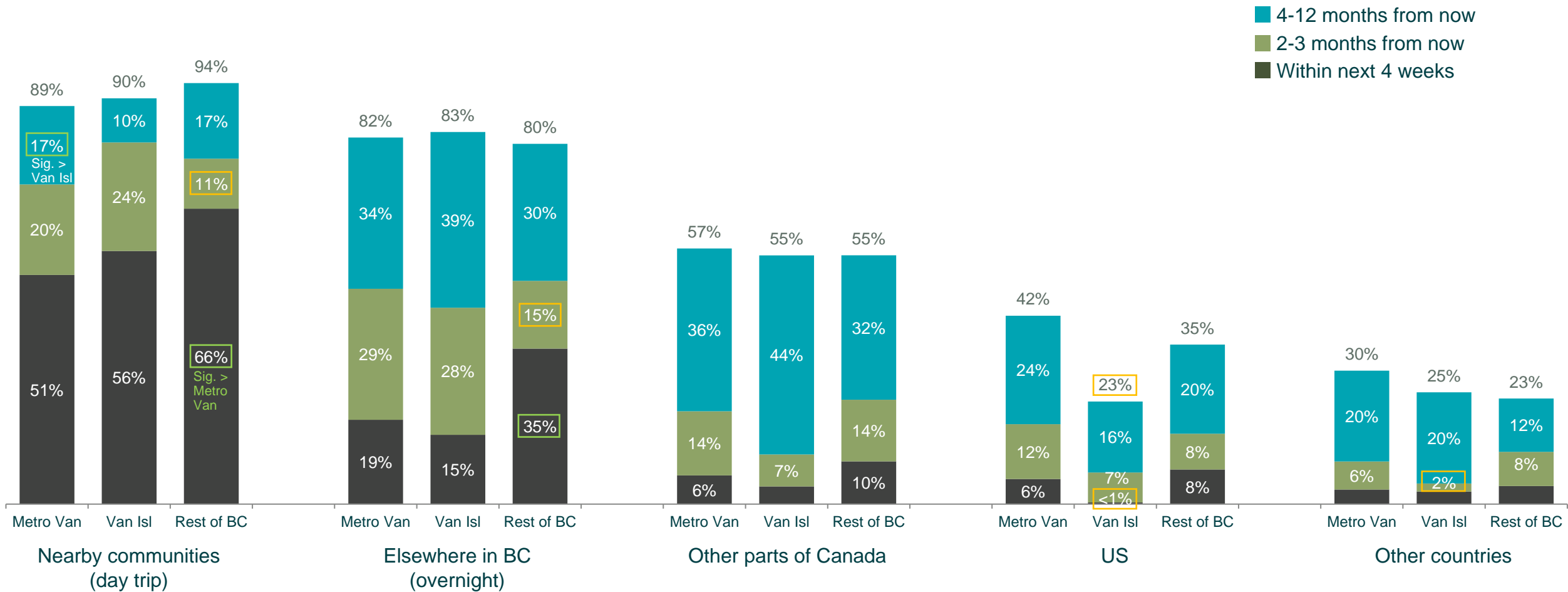


Within next 4 weeks
 2-3 months from now
 4-12 months from now
 Within 2 years
 Not sure, but longer than 2 years
 Only if vaccine available
 Never

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 38 – Oct 27, 2021)



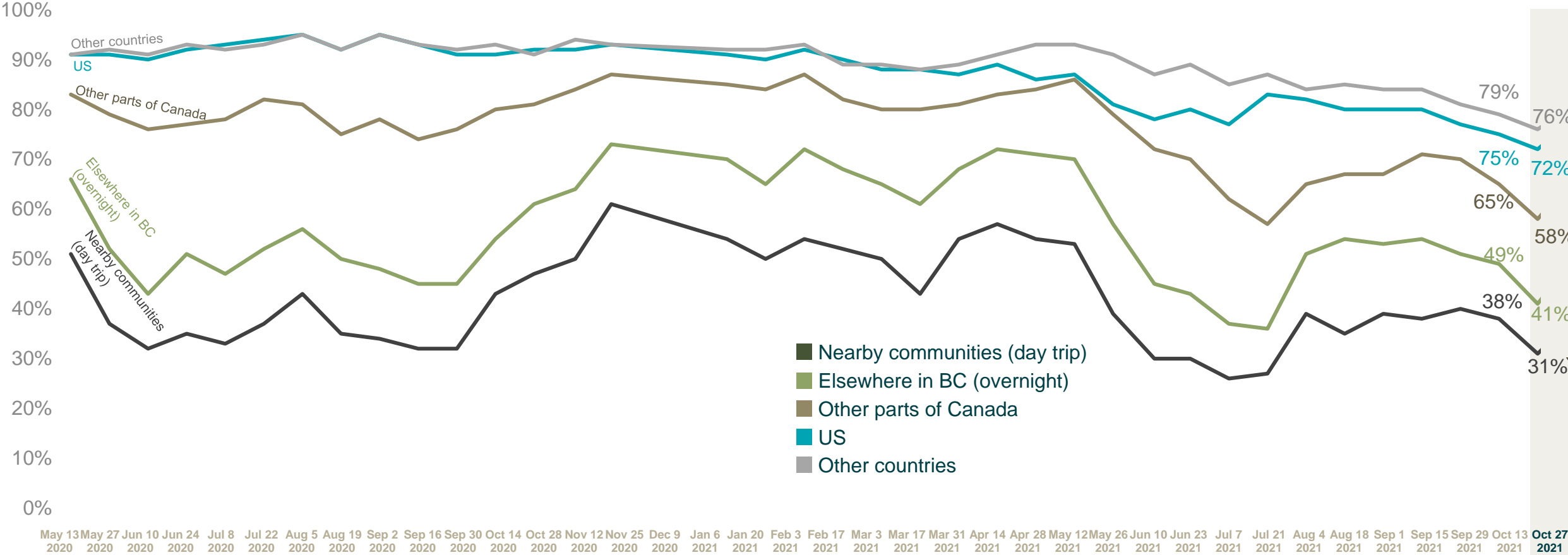
17% Statistically significantly **higher** than comparison group(s).
23% Statistically significantly **lower** than comparison group(s).

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

CONCERN WELCOMING VISITORS

Tracking British Columbians' Concern Welcoming Visitors

(Total Very/Somewhat Concerned By Visitor Origin)



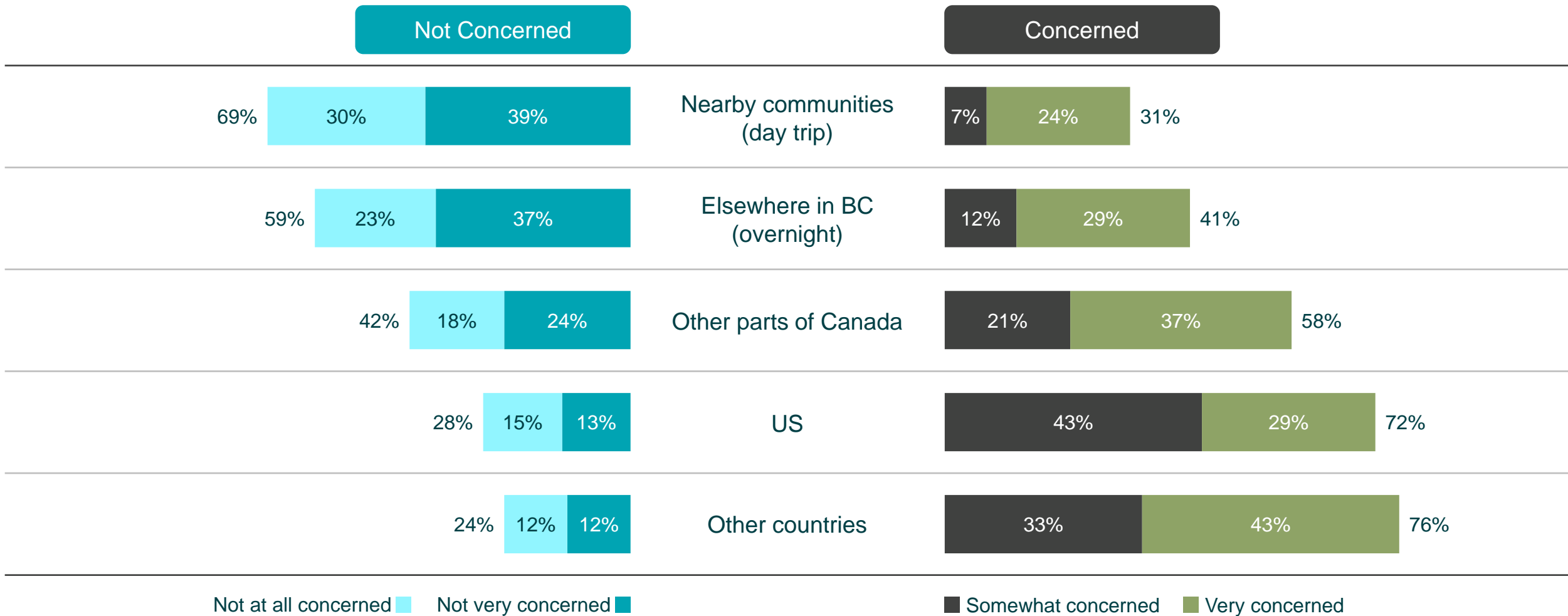
May 13 2020, May 27 2020, Jun 10 2020, Jun 24 2020, Jul 8 2020, Jul 22 2020, Aug 5 2020, Aug 19 2020, Sep 2 2020, Sep 16 2020, Sep 30 2020, Oct 14 2020, Oct 28 2020, Nov 12 2020, Nov 25 2020, Dec 9 2020, Jan 6 2021, Jan 20 2021, Feb 3 2021, Feb 17 2021, Mar 3 2021, Mar 17 2021, Mar 31 2021, Apr 14 2021, Apr 28 2021, May 12 2021, May 26 2021, Jun 10 2021, Jun 23 2021, Jul 7 2021, Jul 21 2021, Aug 4 2021, Aug 18 2021, Sep 1 2021, Sep 15 2021, Sep 29 2021, Oct 13 2021, Oct 27 2021

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

Snapshot Of British Columbians' Concern Welcoming Visitors

(Wave 38 – Oct 27, 2021)



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?

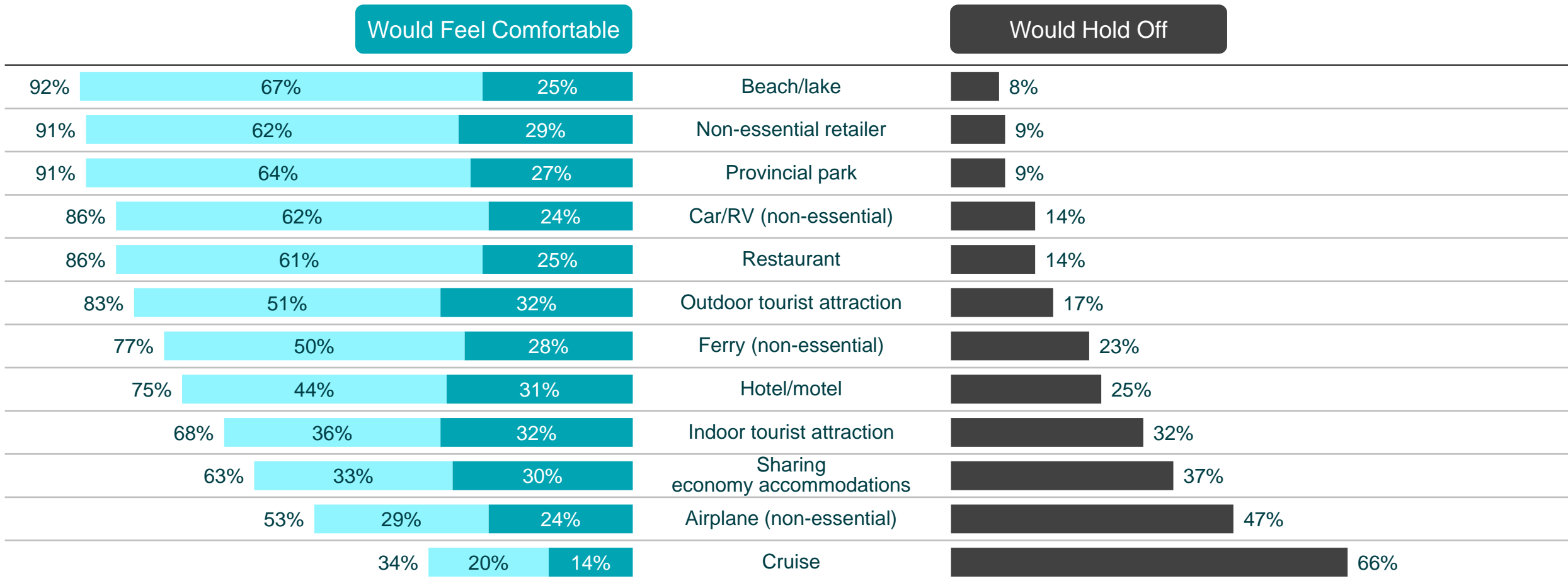
D2a. And how concerned would you be with the following types of Canadian visitors making non-essential trips into your community over the next few weeks?

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 38 – Oct 27, 2021)



Definitely would feel comfortable ■ Probably would feel comfortable ■

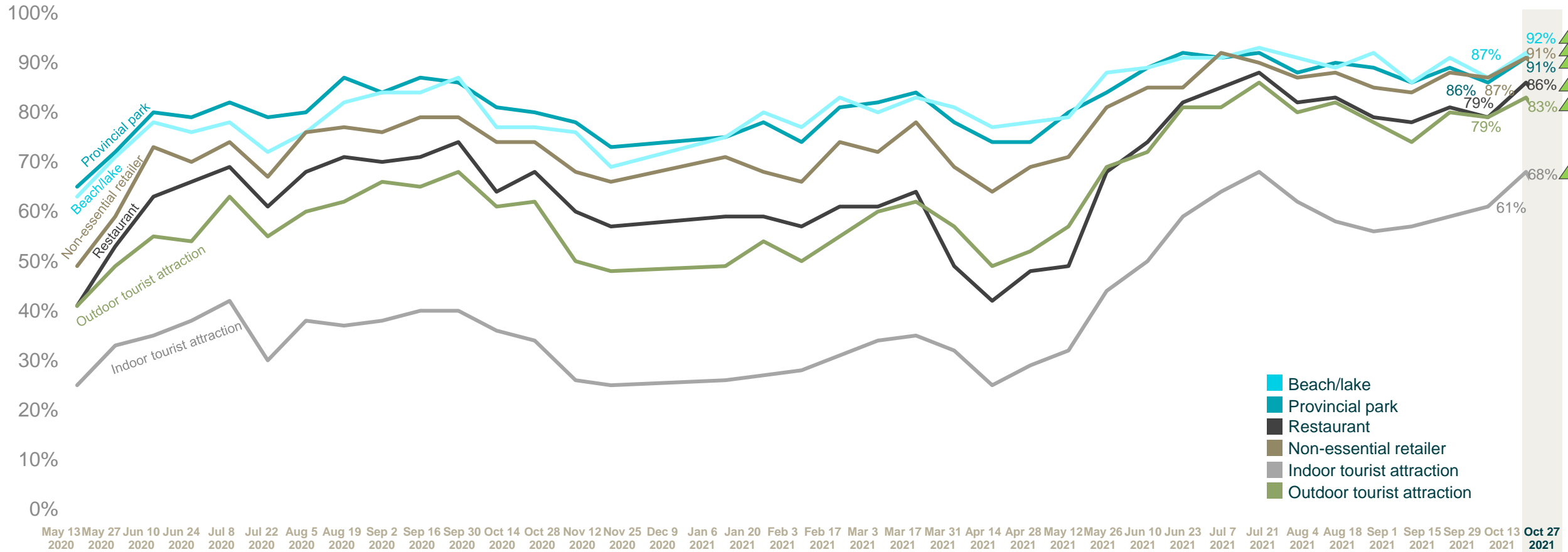
■ Would hold off longer due to concerns

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 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



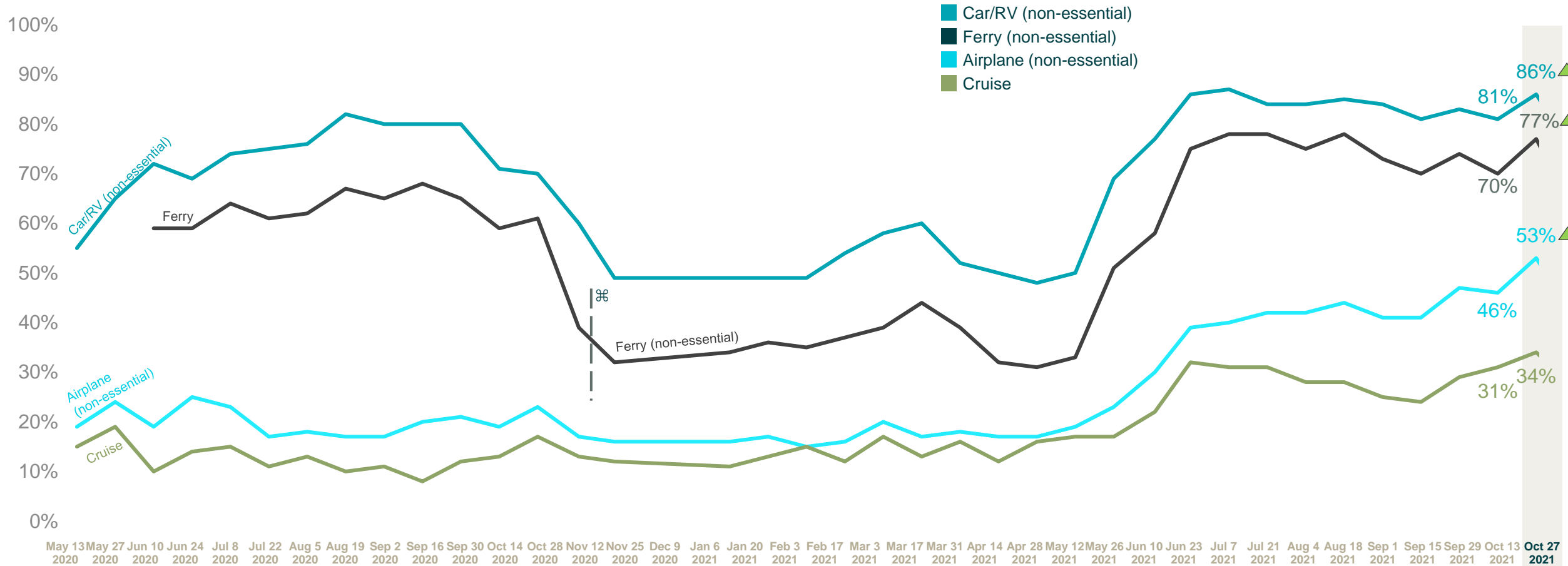
(Total Definitely/Probably Would By Activity)



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

Tracking British Columbians' Comfort Levels With Transportation Modes

(Total Definitely/Probably Would By Transportation)



⌘ 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

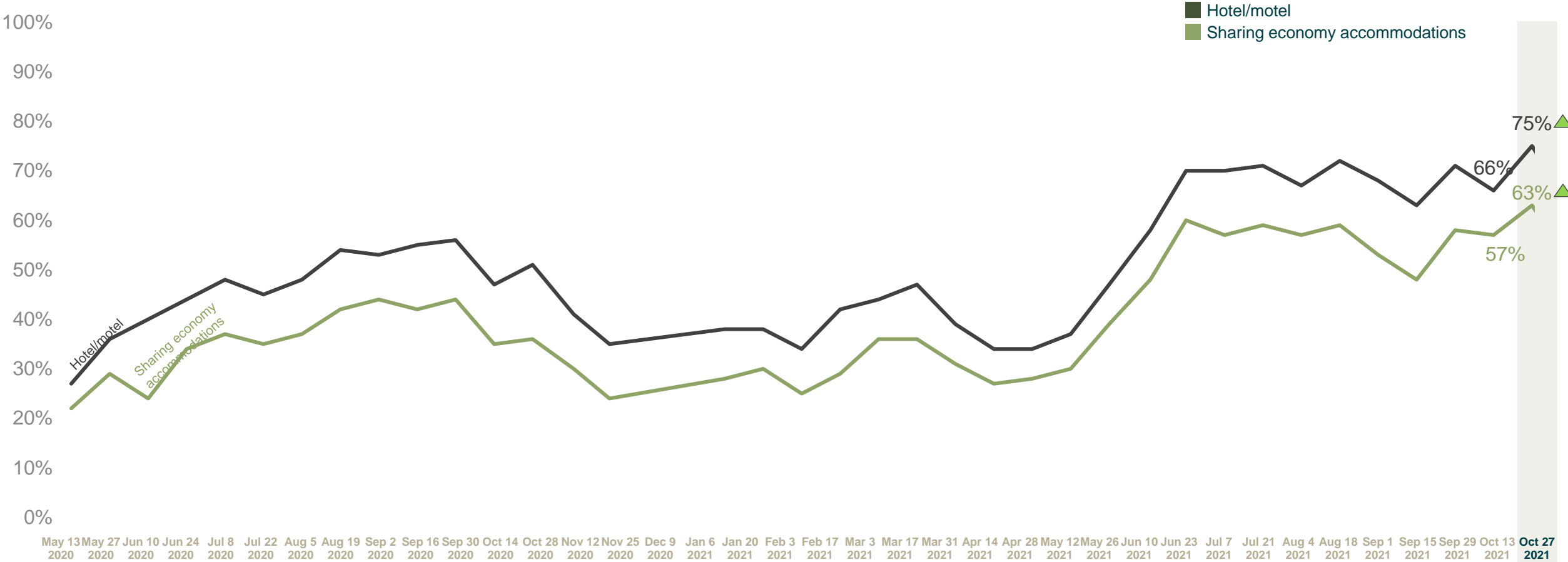
D1. Would be comfortable doing/using each of the following in the next few weeks, or are you likely to hold off longer due to concerns about COVID-19?

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

▼ Statistically significantly **lower** than previous wave.

Tracking British Columbians' Comfort Levels With Accommodation

(Total Definitely/Probably Would By Accommodation Type)



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

APPENDIX: METRICS BY DEMOGRAPHICS

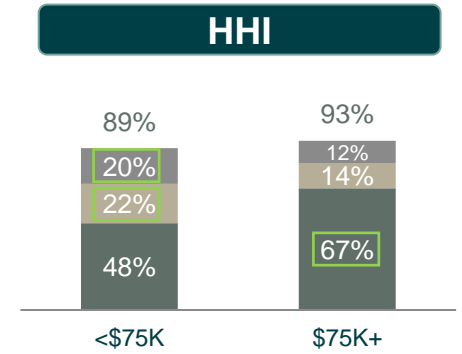
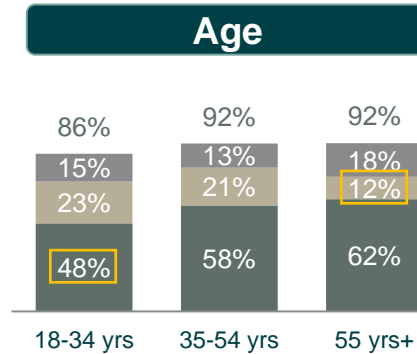
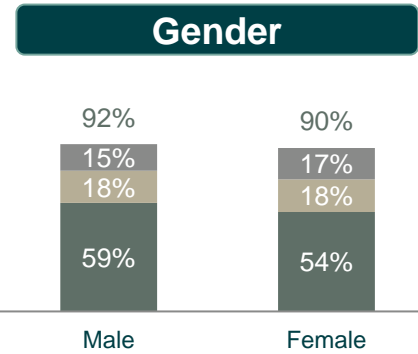
Snapshot Of British Columbians' Travel Intent By Demographics

(Wave 38 – Oct 27, 2021)

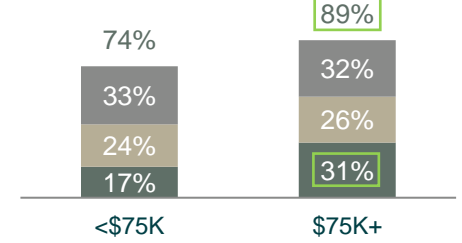
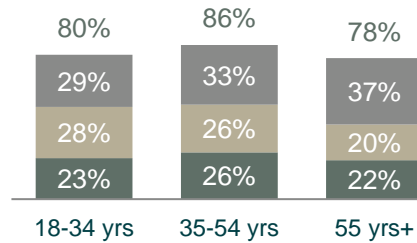
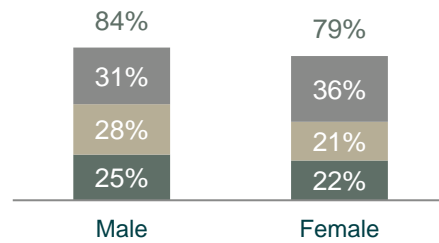


- 4-12 months from now
- 2-3 months from now
- With next 4 weeks

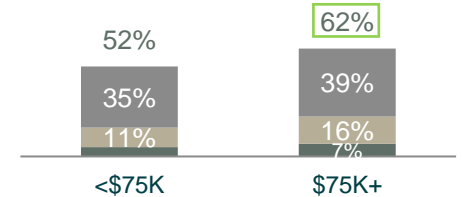
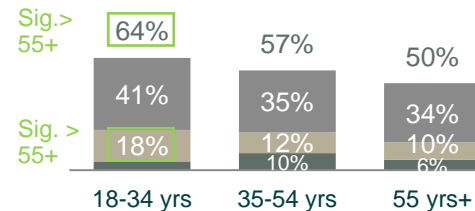
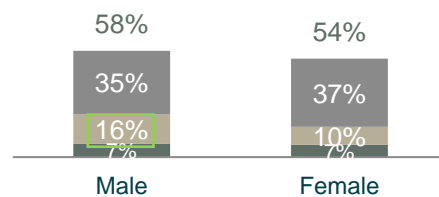
Nearby communities
(day trip)



Elsewhere in BC
(overnight)



Other parts of Canada

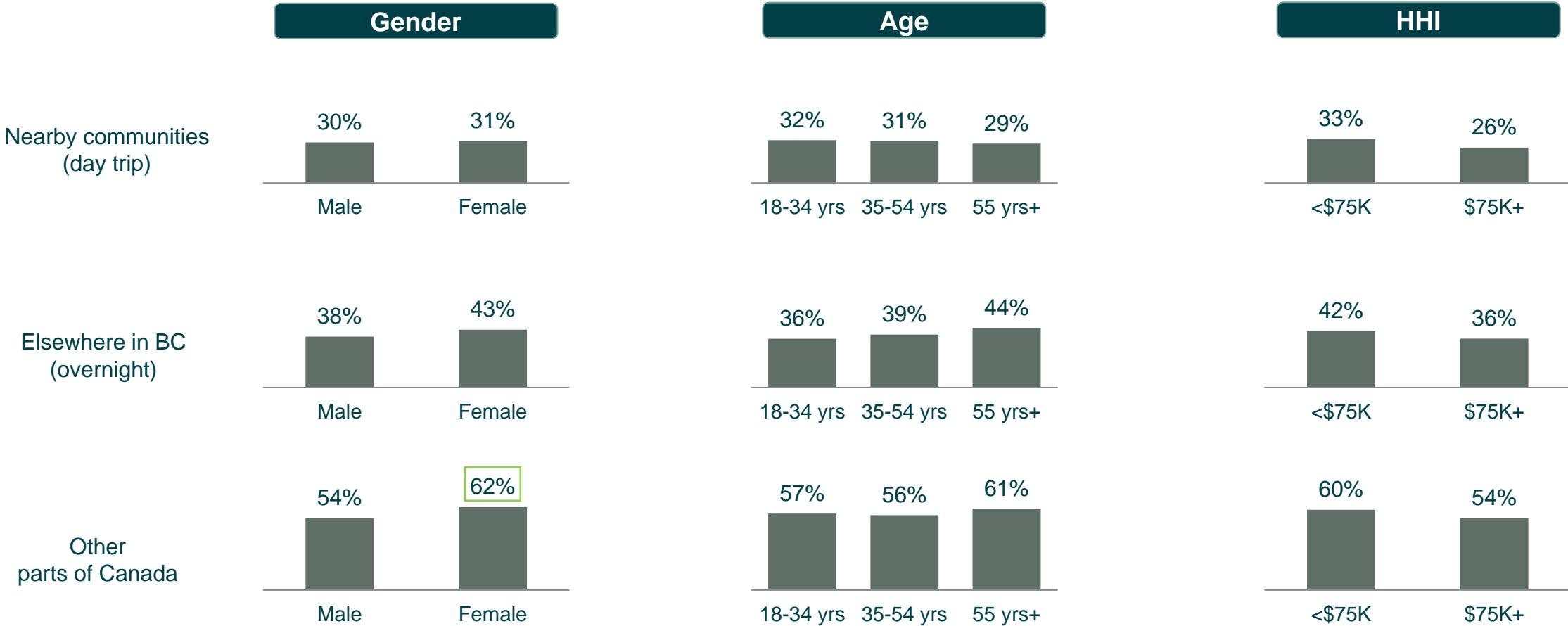


□ Statistically significantly **higher** than comparison group(s).
 □ Statistically significantly **lower** than comparison group(s).

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 38 – Oct 27, 2021)

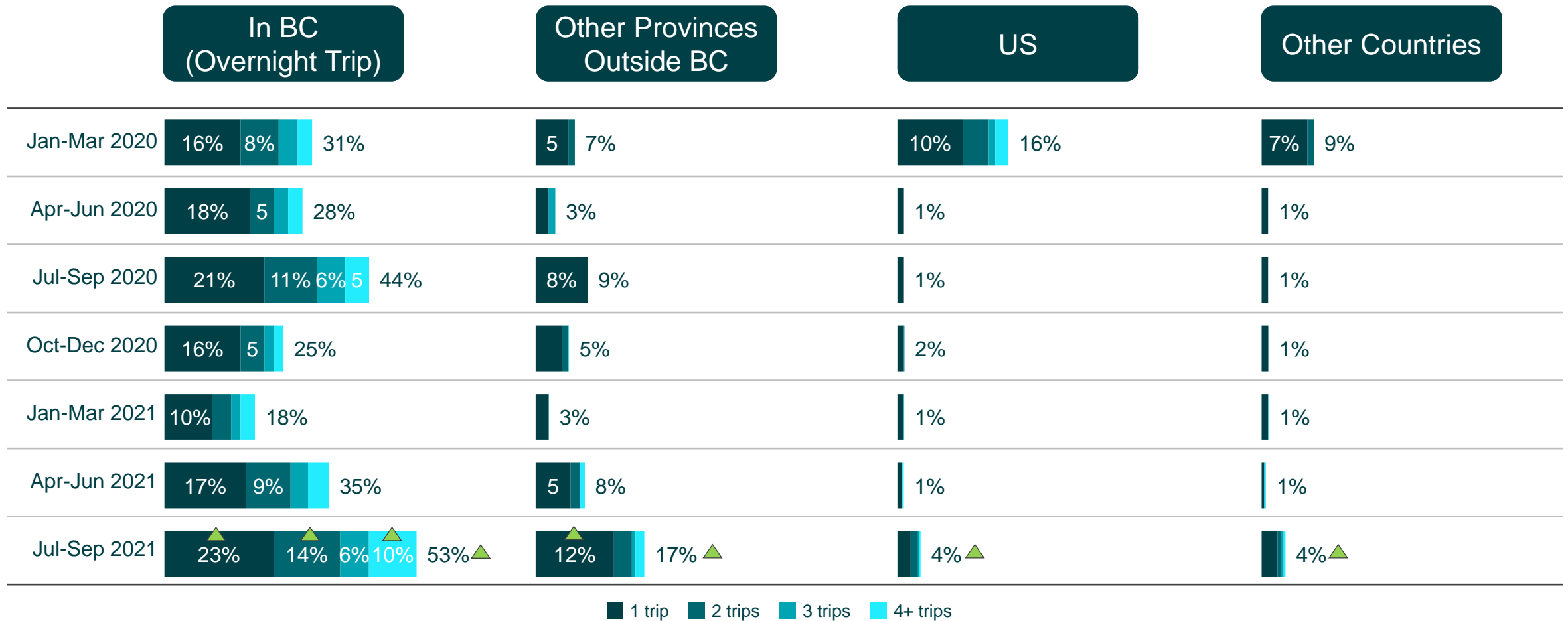


 Statistically significantly **higher** than comparison group(s).
 Statistically significantly **lower** than comparison group(s).

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?

APPENDIX: PAST AD-HOC FINDINGS

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.

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.

▼ Statistically significantly **lower** than previous wave.

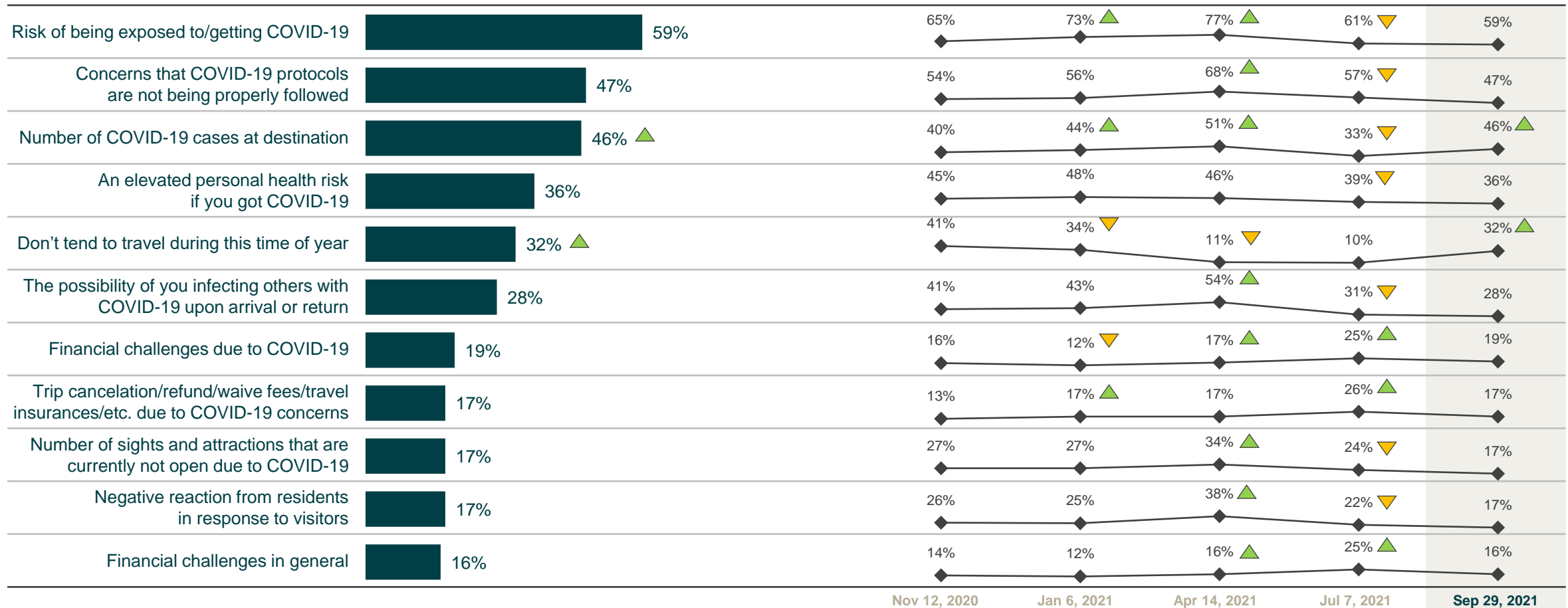
Reasons For Not Considering Future BC Travel (Aided)

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



Sept 29, 2021

Tracking

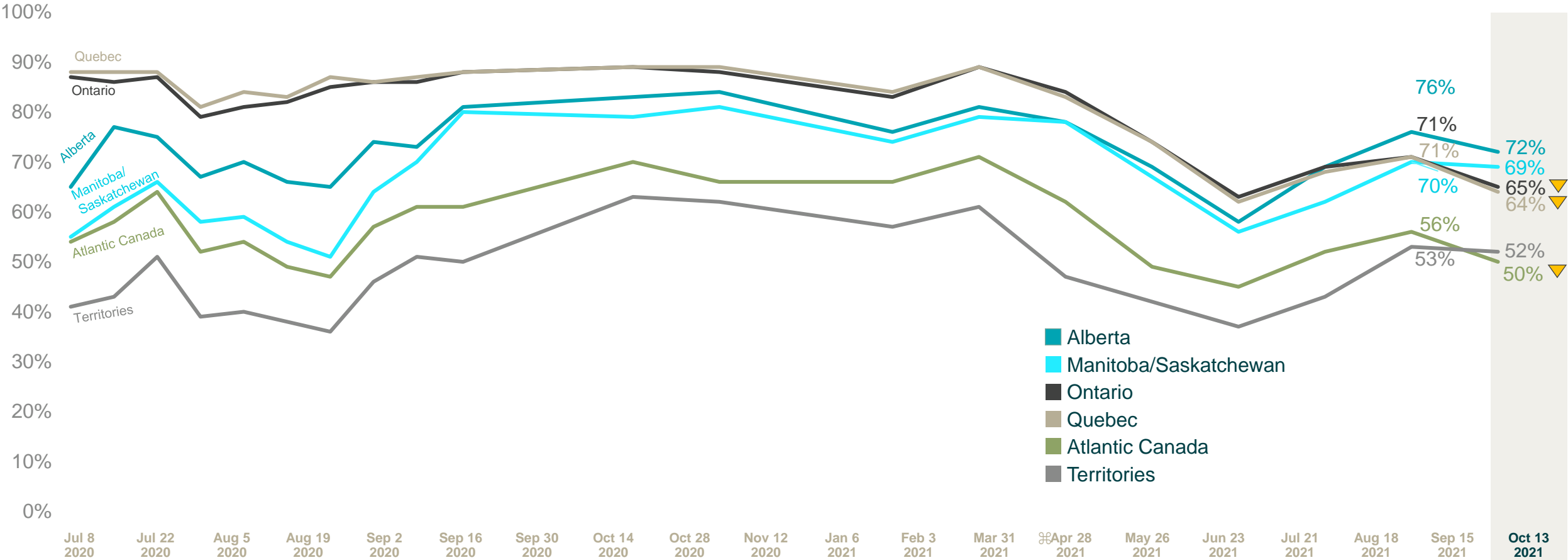


Base: Those who are not likely to take a daytrip in BC or an overnight trip in BC in the next 3 months
 D4. Why are you not likely to travel in BC for a day trip or an overnight trip in the next 3 months?

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

Tracking British Columbians' Concern Welcoming Canadian Visitors

(Total Very/Somewhat Concerned By Origin)

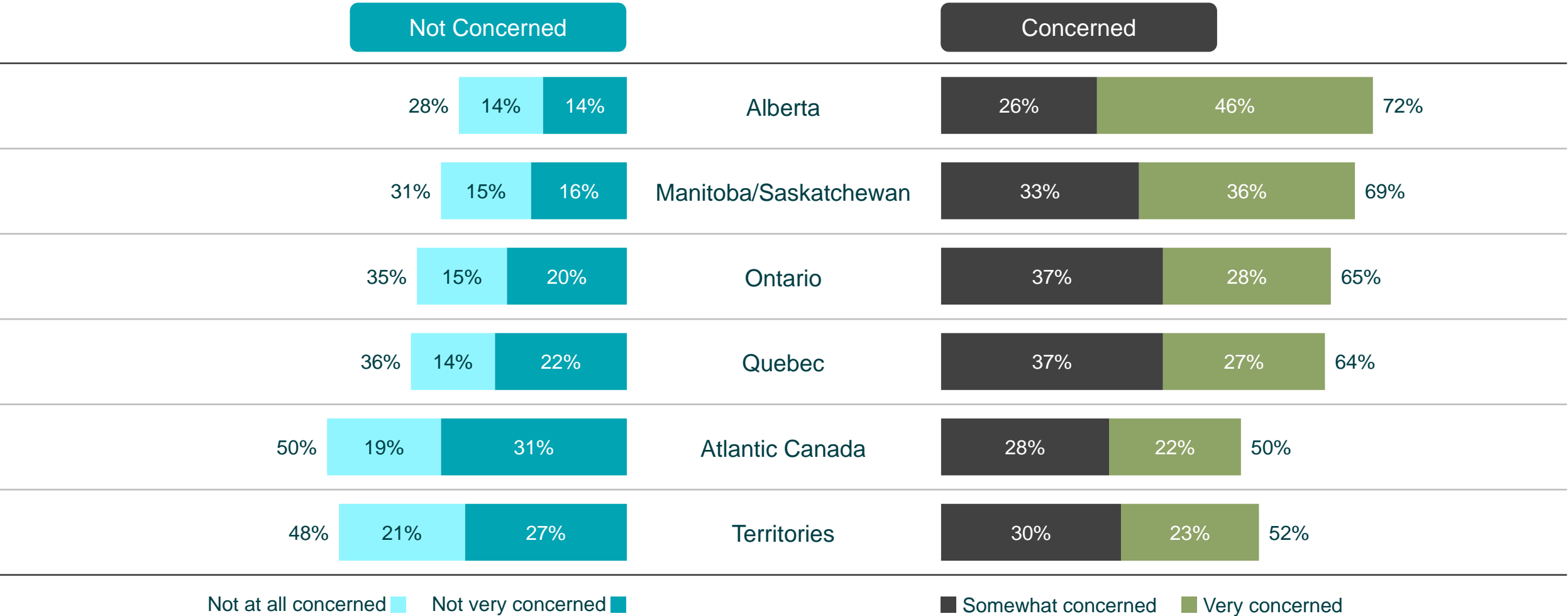


▲ Statistically significantly **higher** than previous wave.
 ▼ Statistically significantly **lower** than previous wave.

⌘ Question frequency changed from bi-weekly to monthly starting November 12, 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?

Snapshot Of British Columbians' Concern Welcoming Canadian Visitors

(Wave 37 – Oct 13, 2021)



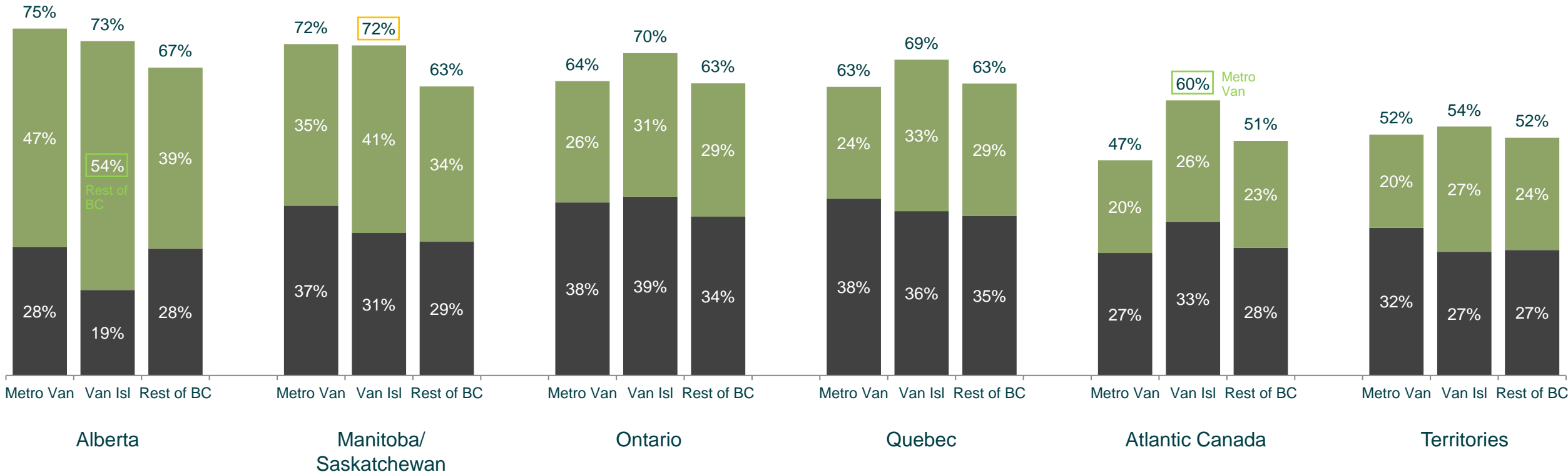
Base: All respondents
 D2a. And how concerned would you be with the following types of Canadian visitors making non-essential trips into your community over the next few weeks?
 Due to rounding, the sum of the individual values shown may not add up to the total shown.

Snapshot Of British Columbians' Concern Welcoming Canadian Visitors By Region

(Wave 37 – Oct 13, 2021)



Very concerned
Somewhat concerned

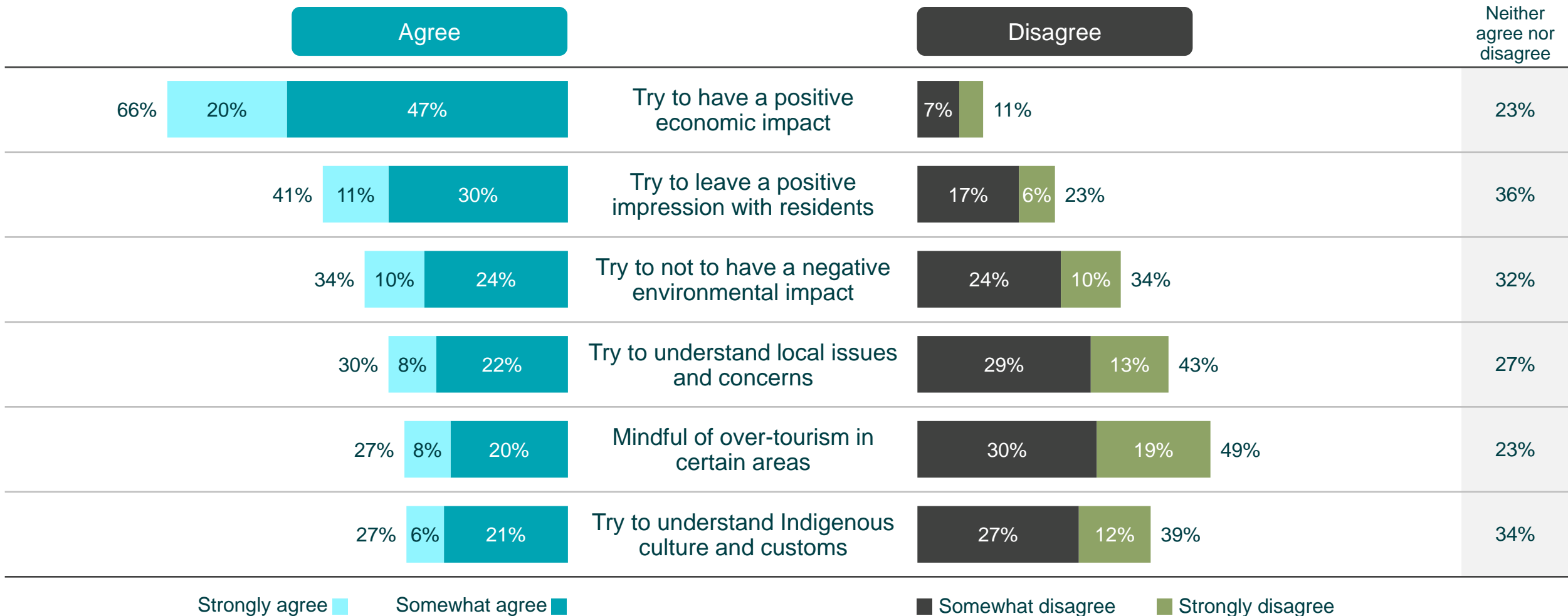


Base: All respondents
D2a. And how concerned would you be with the following types of Canadian visitors making non-essential trips into your community over the next few weeks?
Due to rounding, the sum of the individual values shown may not add up to the total shown.

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

British Columbians' Views On Visitors

(Wave 32 – August 4, 2021)



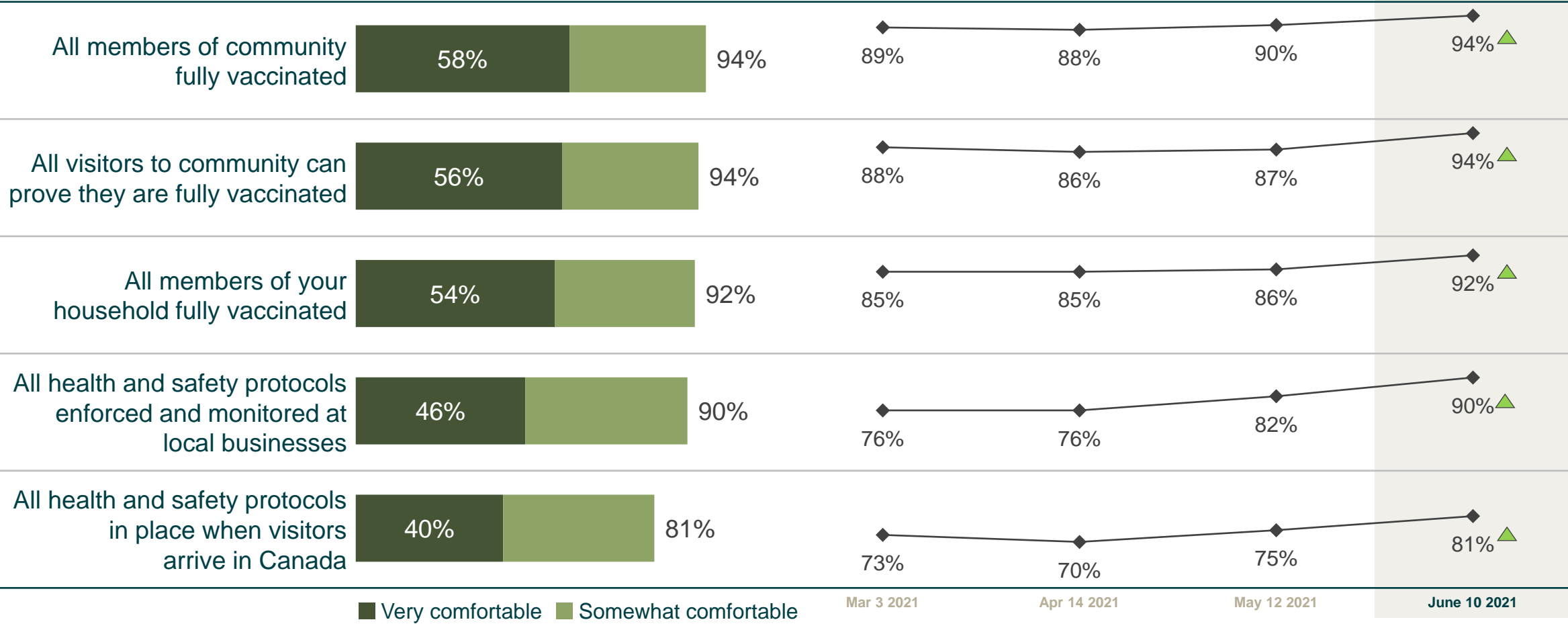
Base: All respondents
 D11. How much do you agree or disagree with each of the following statements?
 Due to rounding, the sum of the individual values shown may not add up to the total shown.

Comfort With Welcoming Visitors Under Various Circumstances



June 10, 2021

Tracking



Very comfortable Somewhat comfortable

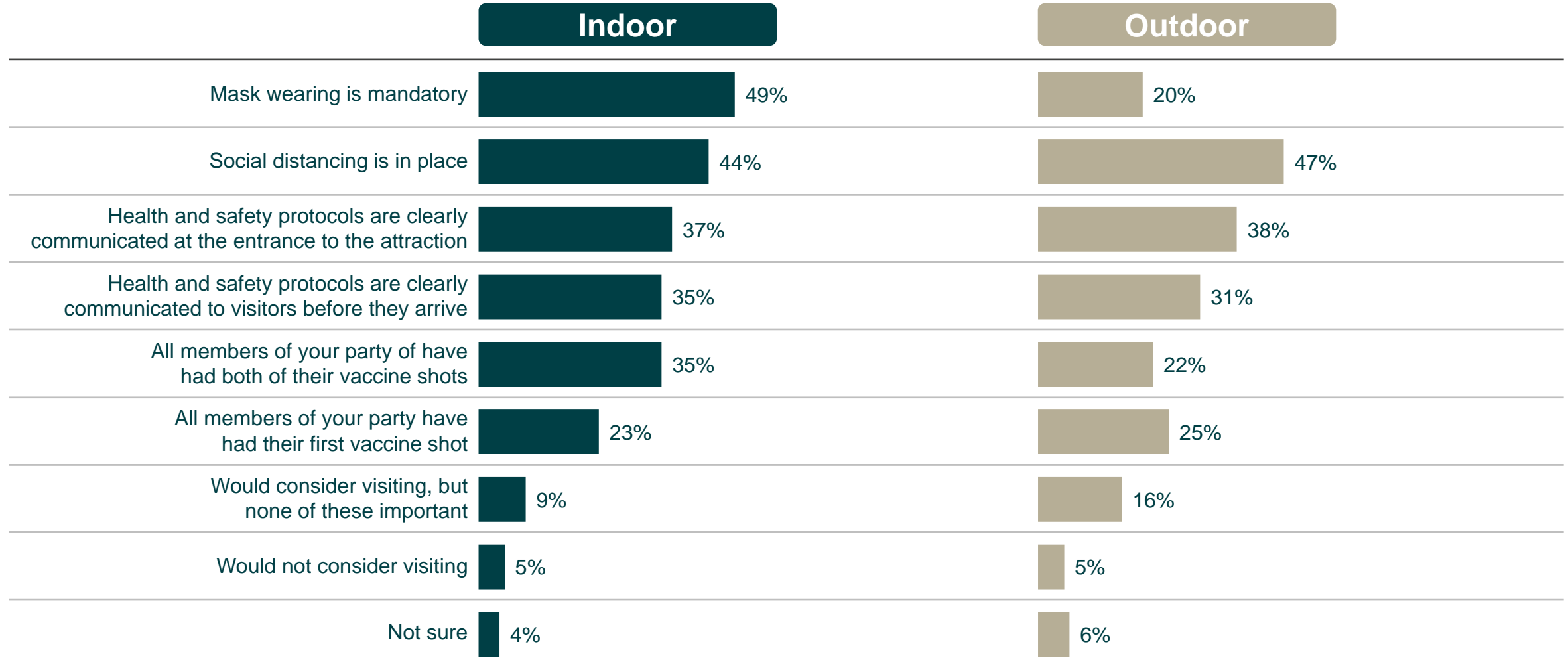
Mar 3 2021 Apr 14 2021 May 12 2021 June 10 2021

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

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

Important Circumstances In Visiting BC Attractions (Aided)

(Wave 29 – June 23, 2021)

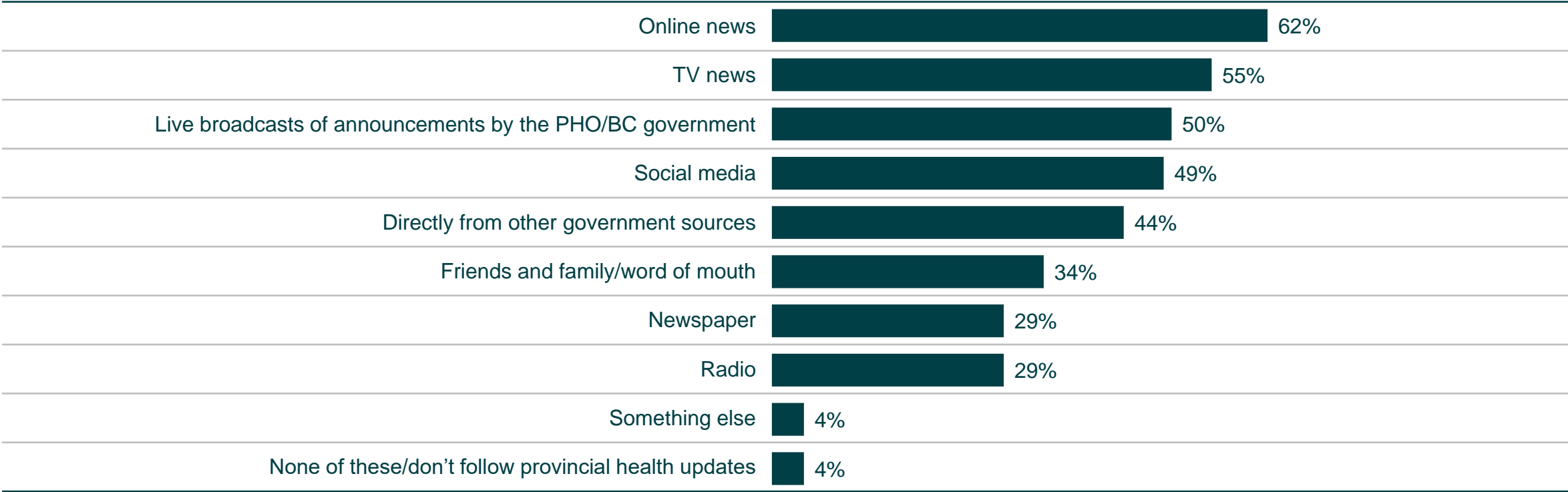


Source Of Provincial COVID-19 Health Updates

(Wave 21 - March 3, 2021)

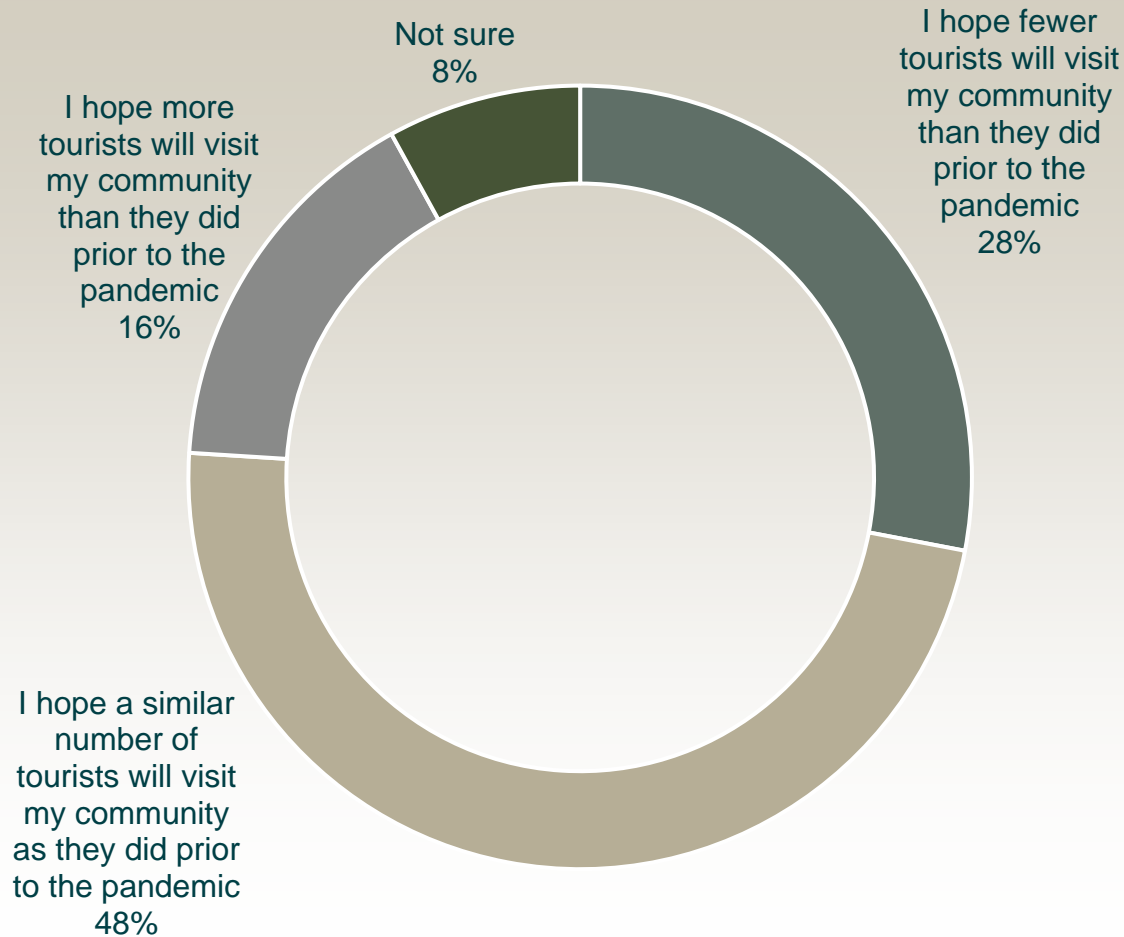


March 3, 2021
(n=827)



Preferred Tourism Post-Pandemic

(Wave 27 – May 26, 2021)



More Tourists	REGION	Fewer Tourists
15%	Metro Vancouver	27%
13%	Vancouver Isl	30%
19%	Rest of BC	28%
GENDER		
23%	Male	23%
9%	Female	32%
AGE		
9%	18 to 34	30%
17%	35 to 54	25%
20%	55+	29%
HH INCOME		
11%	<\$75K	31%
20%	\$75K+	27%

Statistically significantly **higher** 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?



DESTINATION
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Find this report on [Destination BC's COVID-19 Research & Insights](#) webpage.

For more information, please contact:

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Tourism.Research@DestinationBC.ca