



DESTINATION
BRITISH COLUMBIA®

BC Residents' Public Perceptions: COVID-19 Travel and Tourism Wave 26: May 12, 2021

Report prepared by Insights West

Table of Contents



| | |
|---|-----------|
| BACKGROUND AND METHODOLOGY | 3 |
| KEY HIGHLIGHTS | 4 |
| DETAILED FINDINGS | 7 |
| Travel Intent | 7 |
| Concern Welcoming Visitors | 11 |
| Comfort Levels by Activity/Transportation/Accommodation | 15 |
| APPENDIX: ADDITIONAL AD-HOC FINDINGS | 20 |
| APPENDIX: METRICS BY DEMOGRAPHICS | 27 |

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 | August 5-9, 2020 | 998 | +/-3.1% |
| 8 | August 19-23, 2020 | 887 | +/-3.3% |
| 9 | September 2-7, 2020 | 880 | +/-3.3% |
| 10 | September 16-19, 2020 | 842 | +/-3.4% |
| 11 | September 30-October 4, 2020 | 804 | +/-3.4% |
| 12 | October 13-15, 2020 | 1,385 | +/-2.6% |
| 13 | October 28-November 1, 2020 | 802 | +/-3.5% |
| 14 | November 12 – 15, 2020 | 852 | +/-3.4% |
| 15 | November 25 – 30, 2020 | 817 | +/-3.4% |
| 16 | December 9-14, 2020 | 876 | +/-3.4% |
| 17 | January 6-10, 2021 | 826 | +/-3.4% |
| 18 | January 20-24, 2021 | 815 | +/-3.4% |
| 19 | February 3-7, 2021 | 813 | +/-3.4% |
| 20 | February 17-21, 2021 | 836 | +/-3.4% |
| 21 | March 3-7, 2021 | 827 | +/-3.4% |
| 22 | March 17-19, 2021 | 1,057 | +/-3.0% |
| 23 | March 31-Apr 5, 2021 | 827 | +/-3.4% |
| 24 | April 6-14, 2021 | 1,023 | +/-3.1% |
| 25 | April 28-May 2, 2021 | 883 | +/-3.3% |
| 26 | May 12-15, 2021 | 831 | +/-3.4% |

KEY HIGHLIGHTS – WHAT'S NEW OR CHANGED



TRAVEL INTENTIONS

- With provincial travel restrictions remaining in place, travel intentions to all destinations within the next 4 weeks has remained flat in May.
- However, British Columbians appear to be looking towards upcoming changes this summer as travel intentions within BC in the next 2-3 months are trending upwards, both for day trips to nearby communities (76%, up +4% from two weeks ago) and overnight trips within BC (49%, up +4% from two weeks ago).

CONCERN WELCOMING VISITORS

- Concern in welcoming visitors from various locations – within BC, from Canada but outside BC, from the US and from other countries – is again relatively unchanged, as it has been for several waves.
- Concern with visitors from outside Canada remains high with 87% of BC residents concerned about US visitors, and 93% concerned about visitors from other countries. Concern for visitors from other provinces remains high at 86%, whereas concern with visitors from other parts of BC and nearby communities is lower at 70% and 53%, respectively.

KEY HIGHLIGHTS – WHAT’S NEW OR CHANGED



COMFORT WELCOMING VISITORS UNDER VARIOUS CIRCUMSTANCES

- Tested for the third time in this study, the comfort that British Columbians have with visitors to their community based on five different circumstances have not yet varied over time. All measures, especially community and visitor vaccinations, provide greater comfort to a large majority of residents.

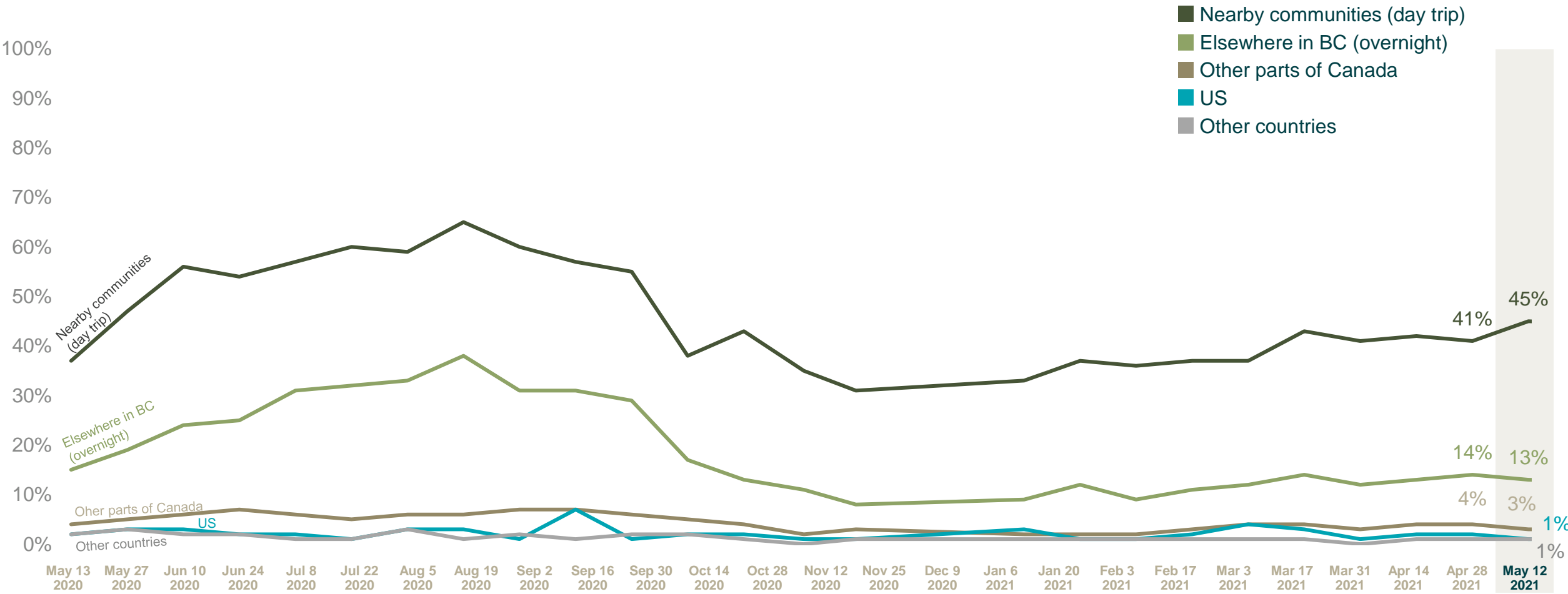
COMFORT WITH ACTIVITIES/MODES OF TRANSPORTATION

- BC residents comfort levels with various activities, transportation modes and accommodation formats saw small increases during this period. This likely reflects a forward-looking mentality as there is anticipation of easing restrictions and reductions in case numbers that will enable residents to do more activities and travel.
 - There was a statistically significant increase in the likelihood of BC residents to visit outdoor tourist attractions (57%, up +5% from the last wave).

TRAVEL INTENT

Tracking British Columbians' Travel Intent Within Next 4 Weeks

(By Destination)

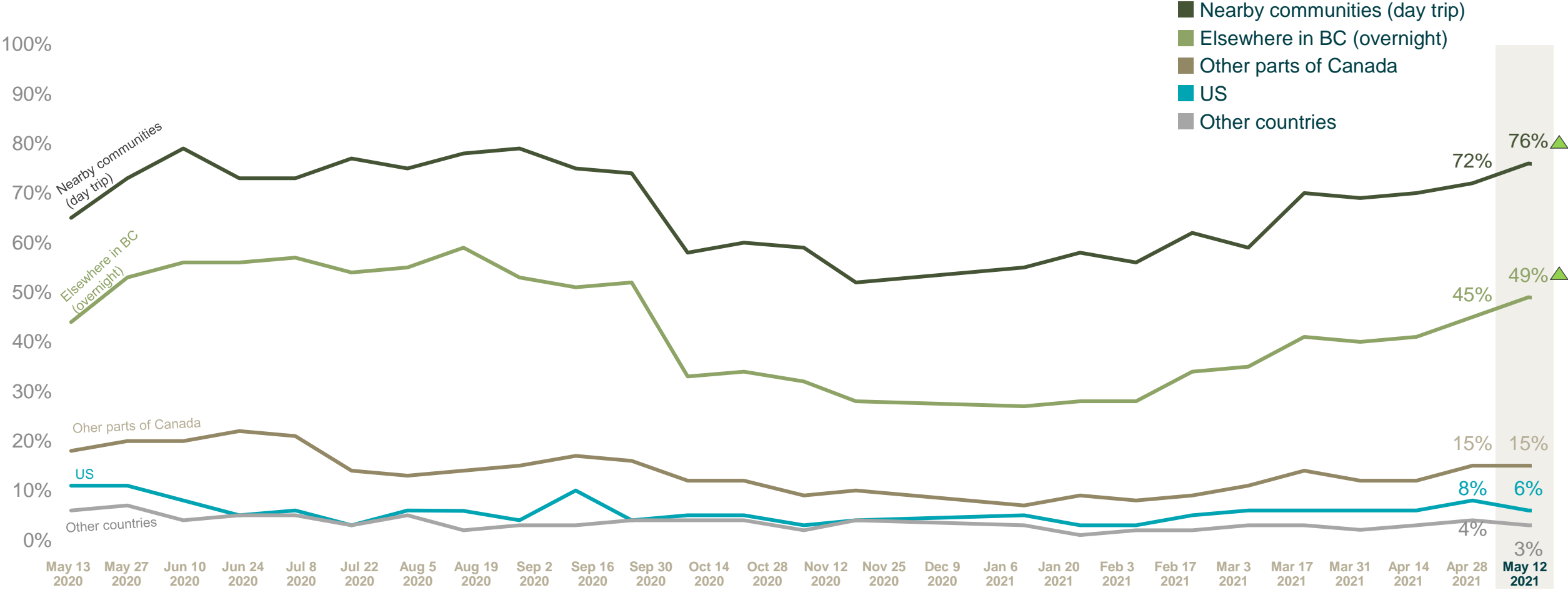


▲ Statistically significantly **higher** than previous wave.
 ▼ Statistically significantly **lower** than previous wave.

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)

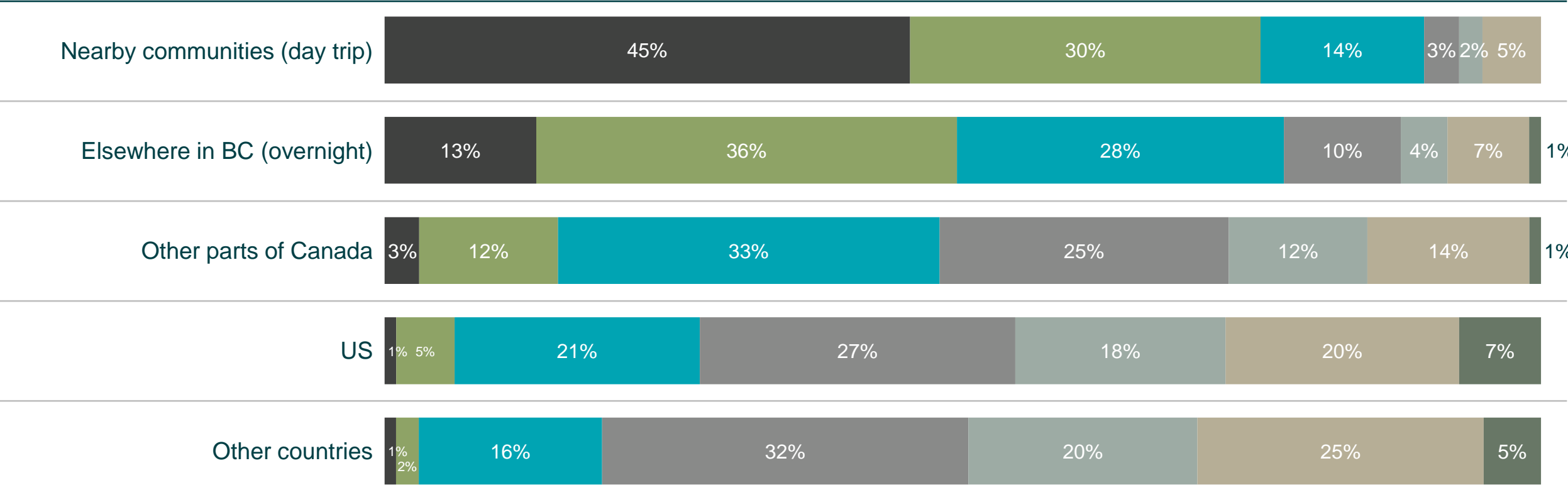


Base: All respondents
 D3. When, if at all, are you likely to make trips to the following destinations?
 Due to rounding, the total may not equal 100% to the sum of individual values shown.

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

Snapshot of British Columbians' Travel Intentions

(Wave 26 – May 12, 2021)

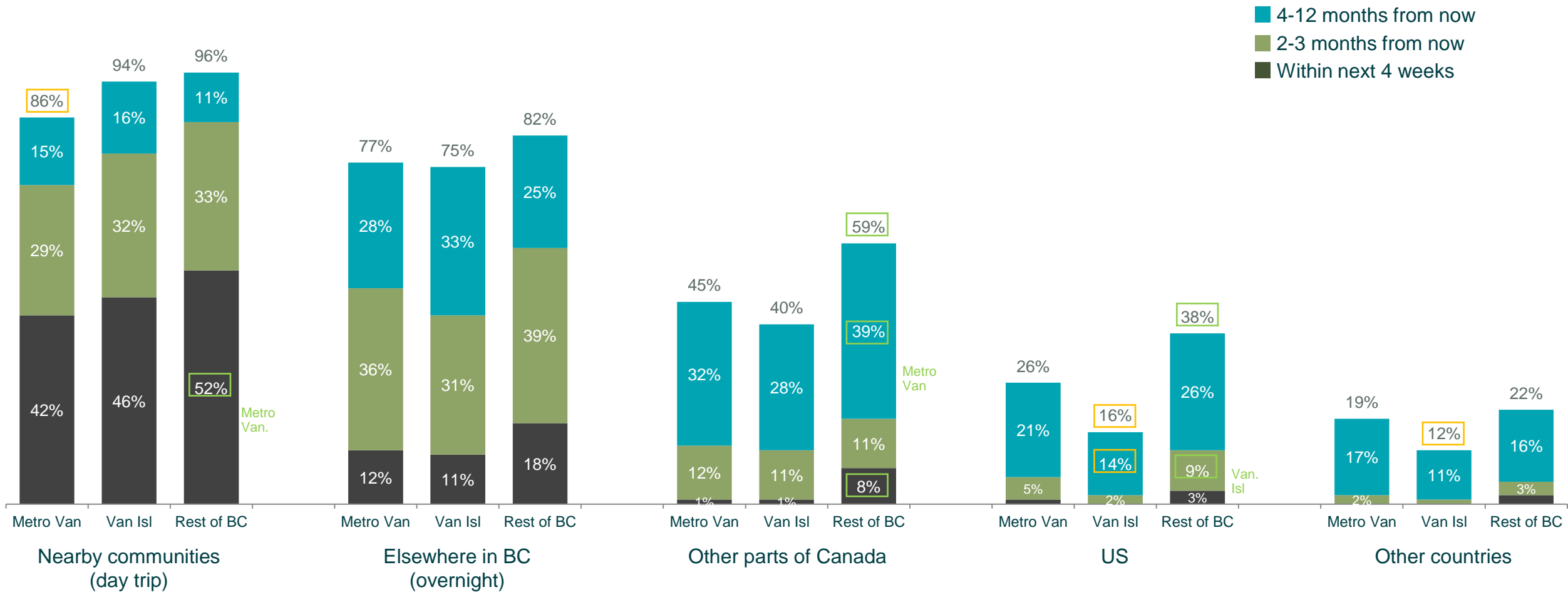


Within next 4 weeks
 2-3 months from now
 4-12 months from now
 Within 2 years
 Not sure, but longer than 2 years
 Only if vaccine available
 Never

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 26 – May 12, 2021)



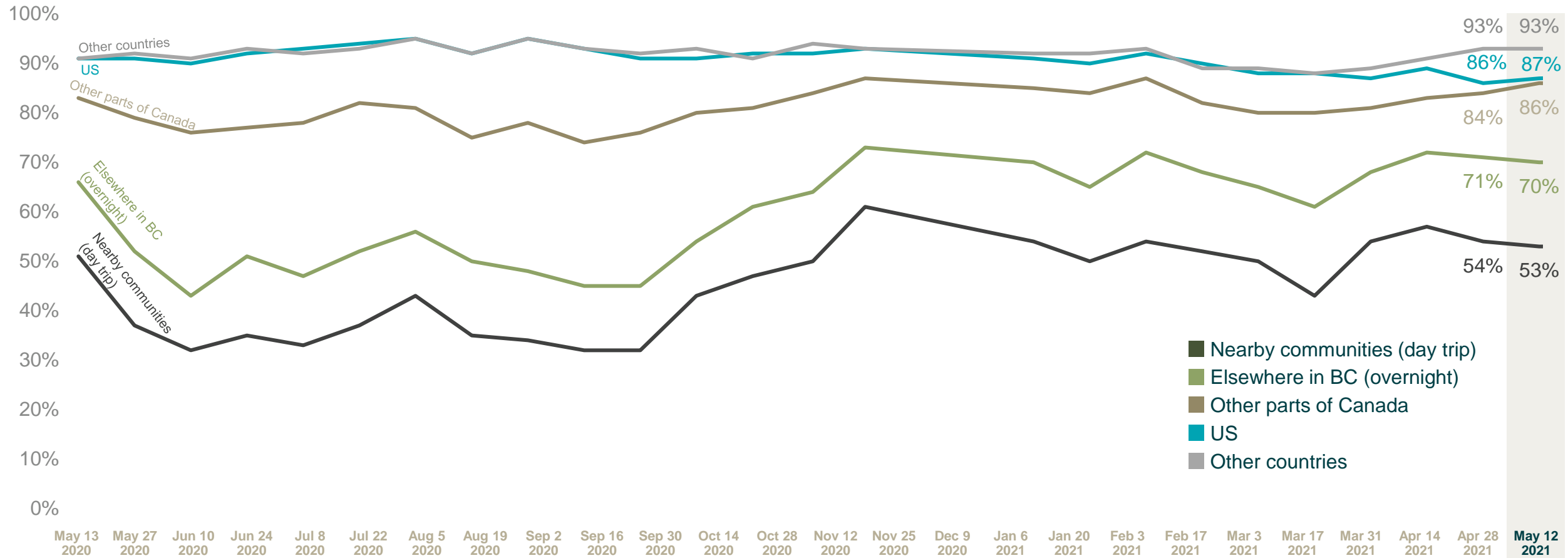
 Statistically significantly **higher** than comparison group(s).
 Statistically significantly **lower** than comparison group(s).

Base: All respondents
 D3. When, if at all, are you likely to make trips to the following destinations?
 Due to rounding, the 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)

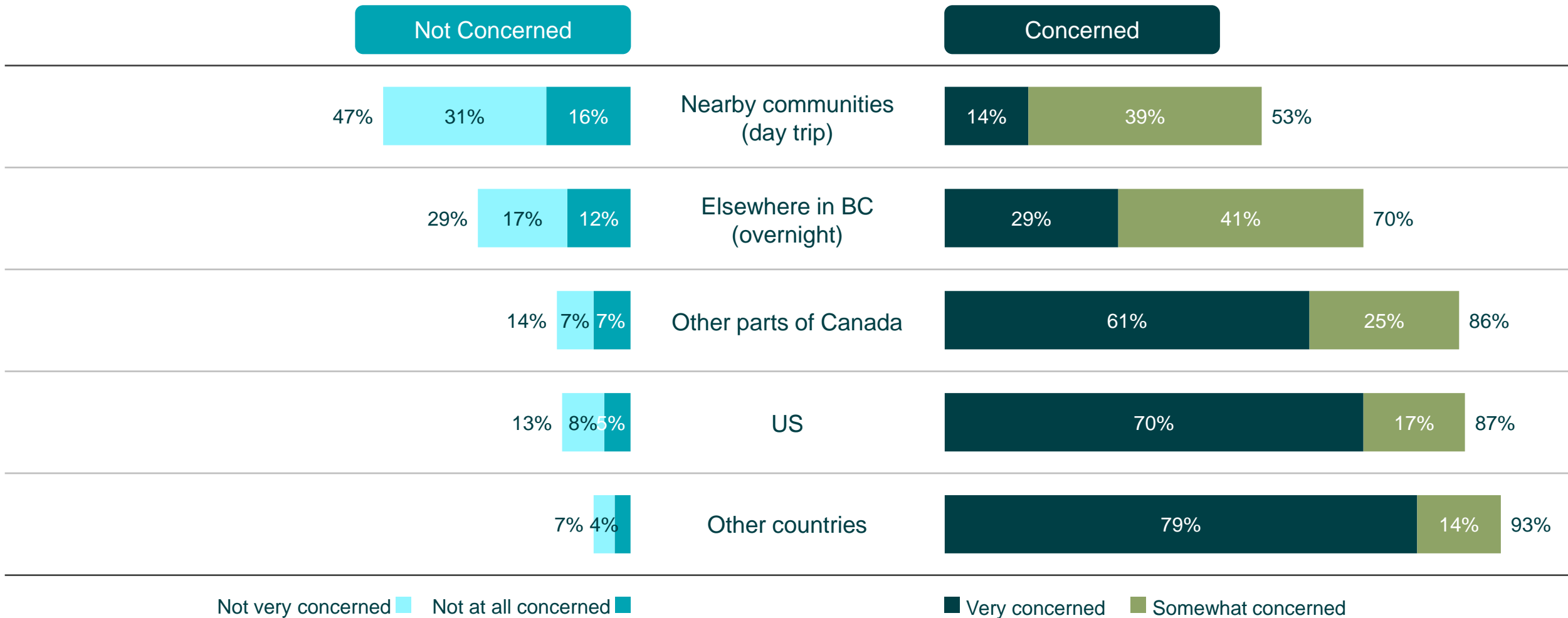


▲ Statistically significantly **higher** than previous wave.
 ▼ Statistically significantly **lower** than previous wave.

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 26 – May 12, 2021)



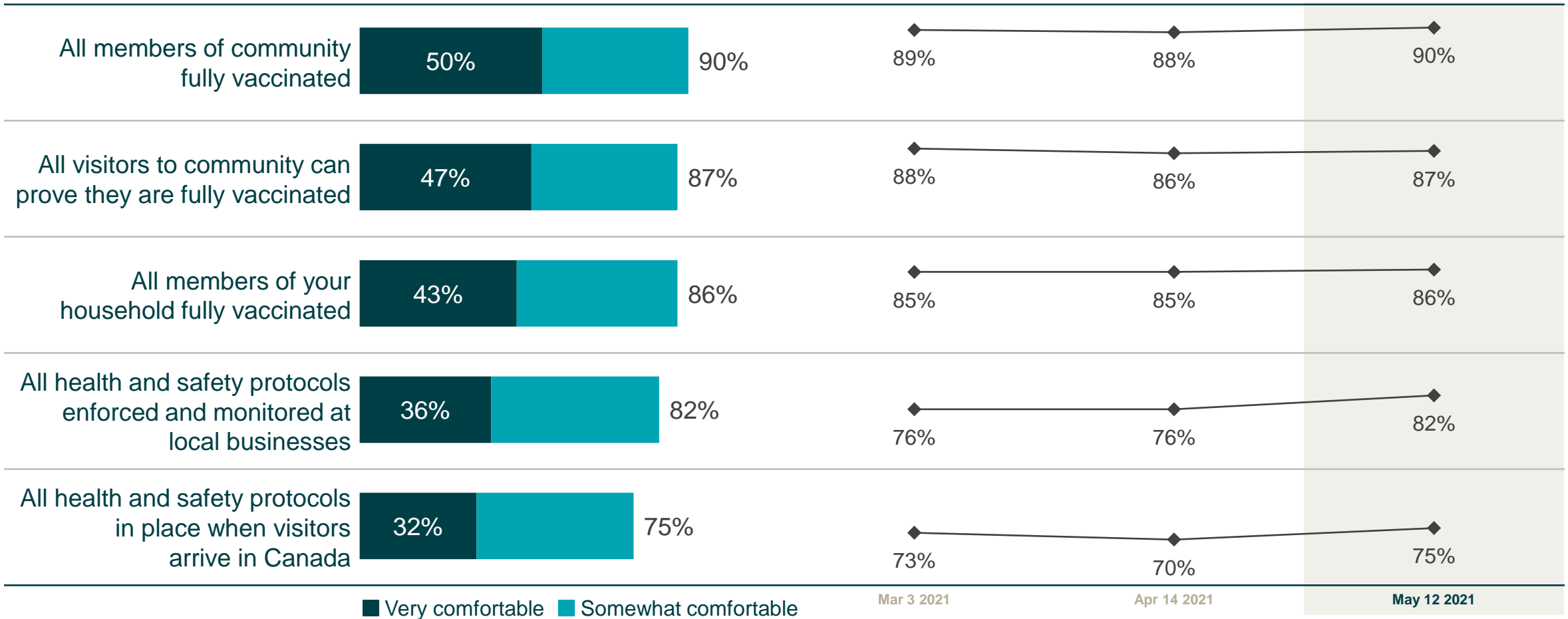
Base: All respondents
 D2. Given the current situation with COVID-19, how concerned would you be with the following types of visitors making non-essential trips into your community over the next few weeks?
 D2a. And how concerned would you be with the following types of Canadian visitors making non-essential 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 With Welcoming Visitors Under Various Circumstances



May 12, 2021

Tracking



Very comfortable Somewhat comfortable

Mar 3 2021

Apr 14 2021

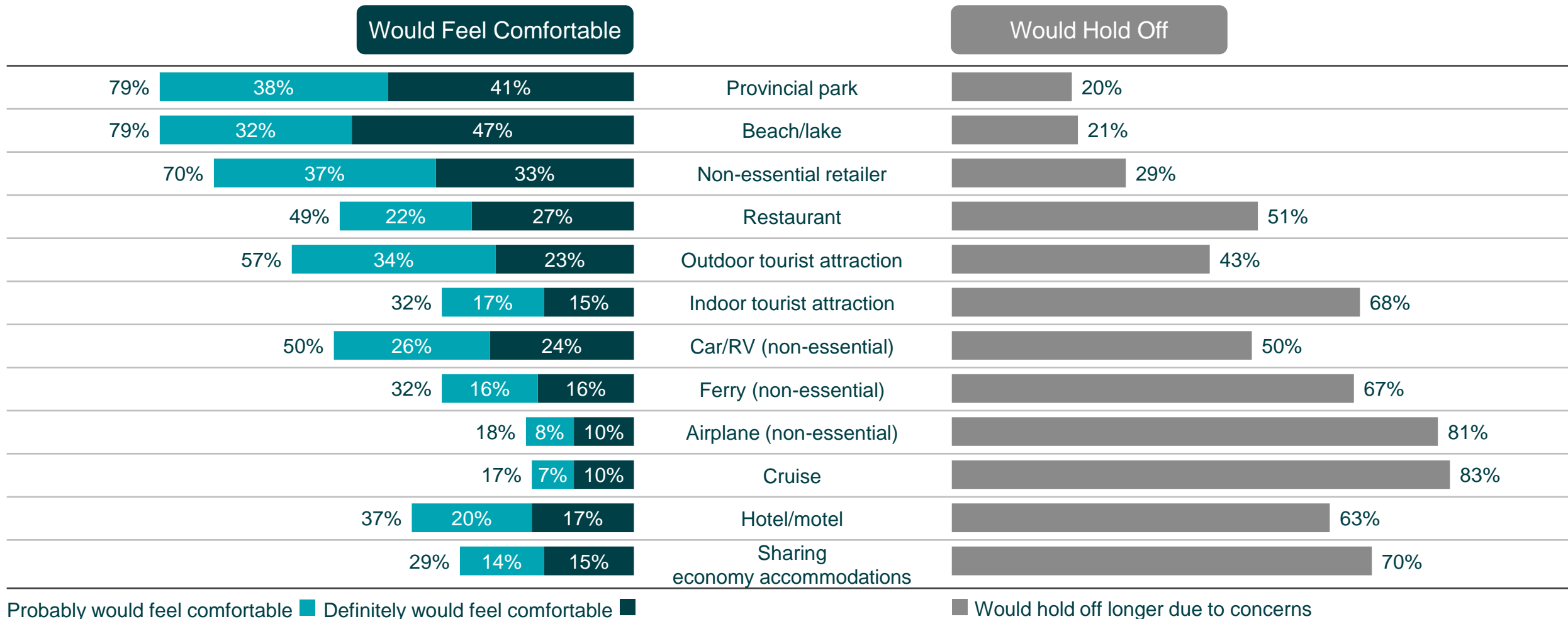
May 12 2021

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

COMFORT LEVELS BY ACTIVITY / TRANSPORTATION / ACCOMMODATION

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

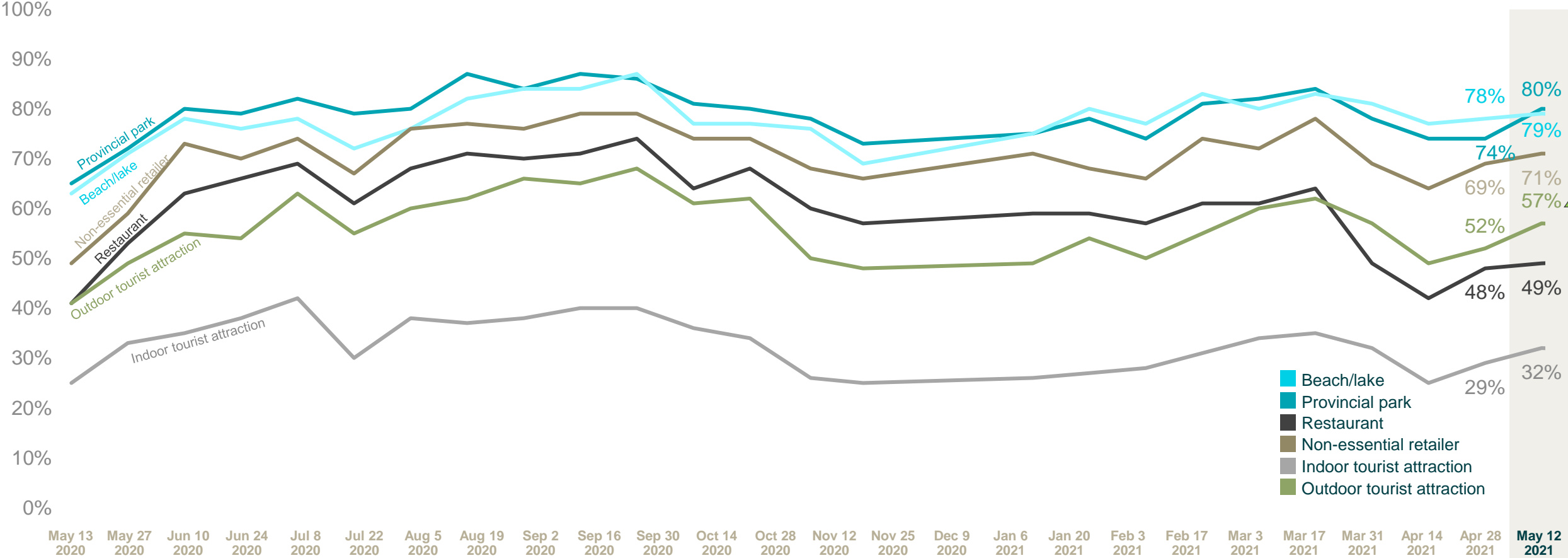
(Wave 26 – May 12, 2021)



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)

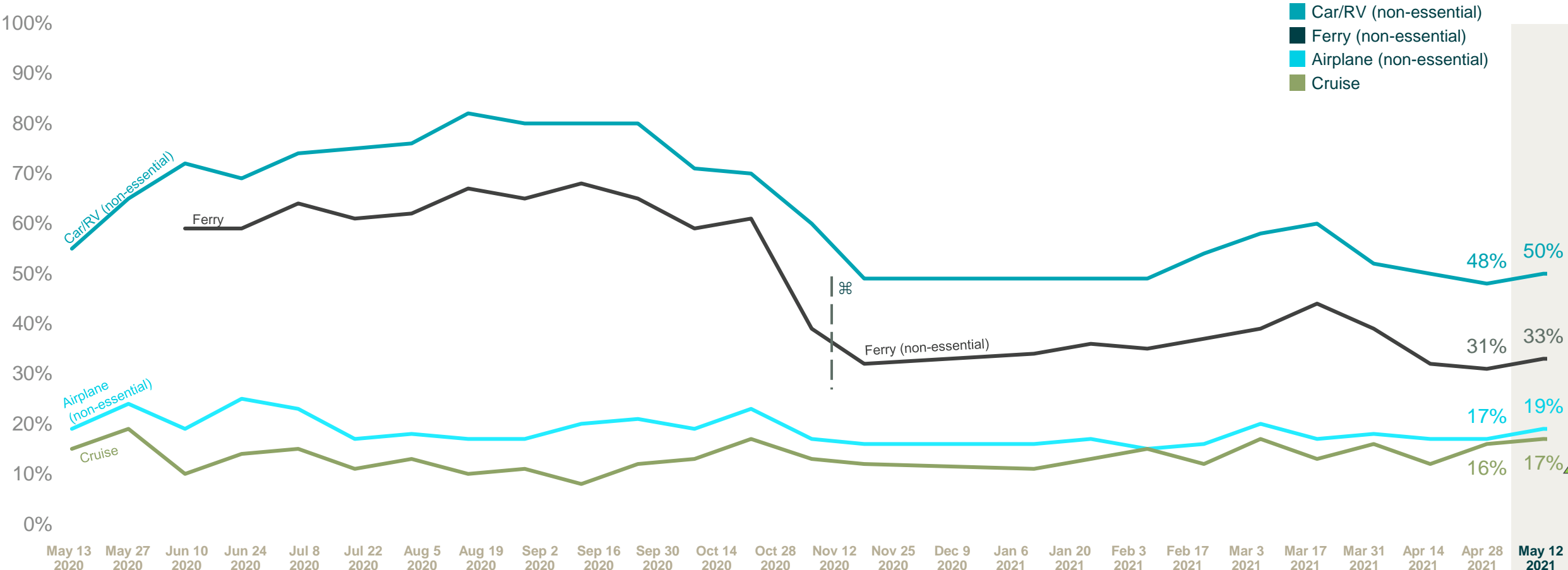


▲ Statistically significantly **higher** than previous wave.
 ▼ Statistically significantly **lower** than previous wave.

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?

Tracking British Columbians' Comfort Levels With Transportation Modes

(Total Definitely/Probably Would by Transportation)

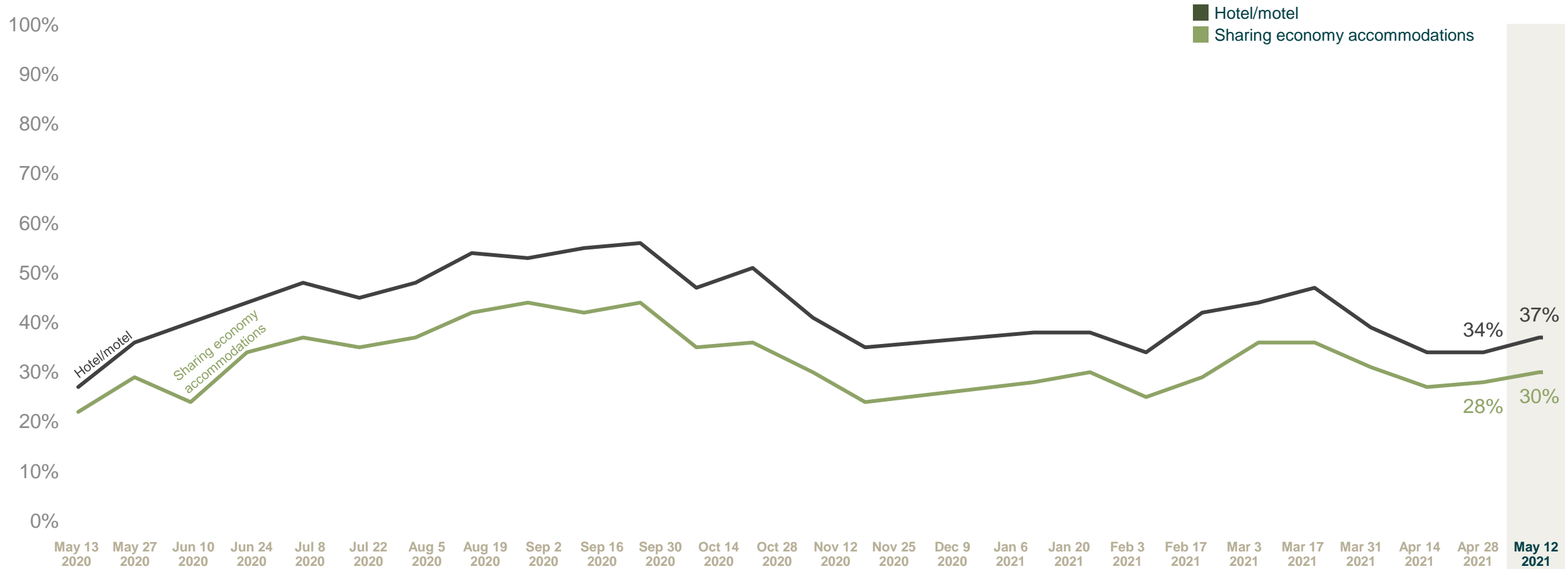


⌘ Changed from "ferry" to "ferry for non-essential travel" November 12, 2020 wave.
 Base: All respondents, excluding not applicable/don't do this in general and not applicable/wouldn't do this at this time of year
 D1. Would be comfortable doing/using each of the following in the next few weeks, or are you be 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.

APPENDIX: METRICS BY DEMOGRAPHICS

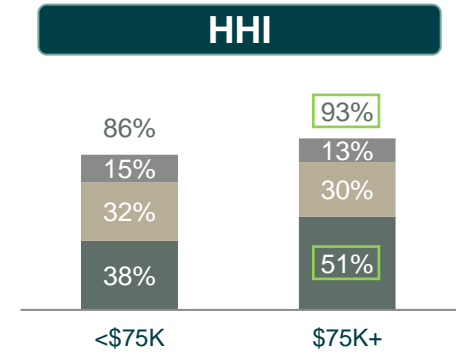
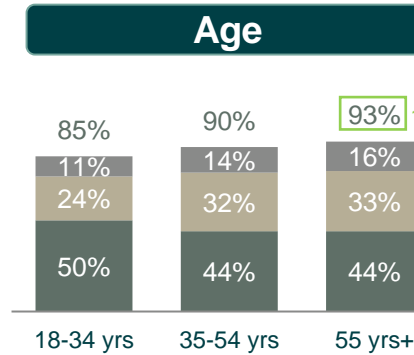
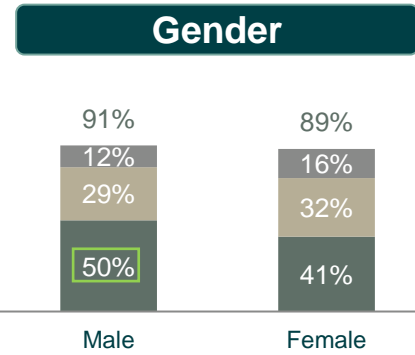
Snapshot of British Columbians' Travel Intent by Demographics

(Wave 26 – May 12, 2021)

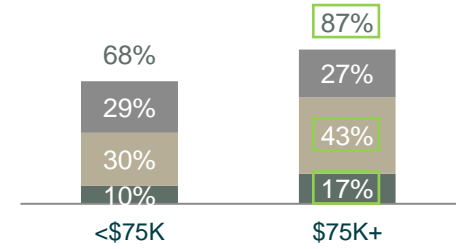
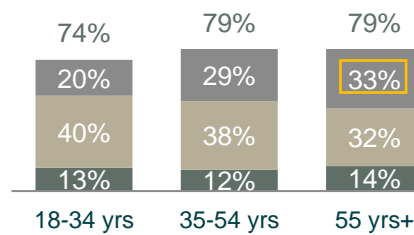
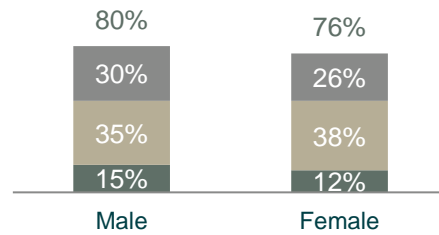


- 4-12 months from now
- 2-3 months from now
- With next 4 weeks

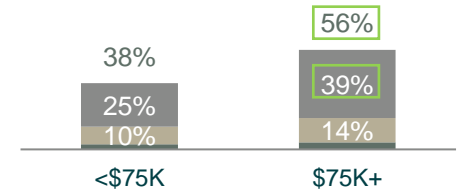
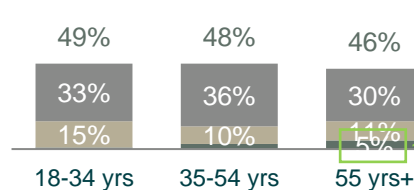
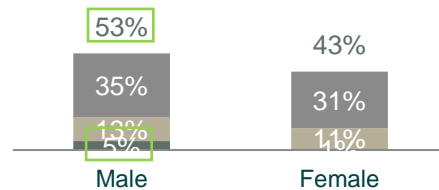
Nearby communities
(day trip)



Elsewhere in BC
(overnight)



Other parts of Canada

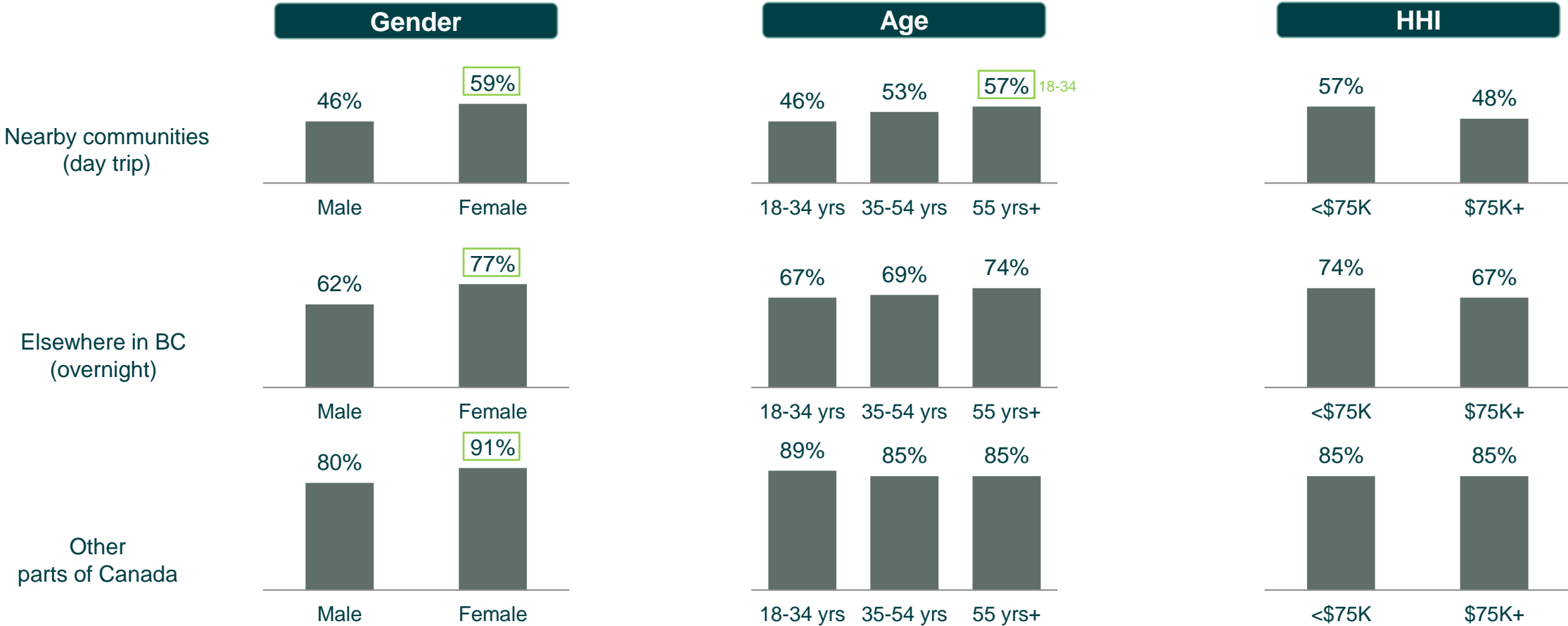


 Statistically significantly **higher** than comparison group(s).
 Statistically significantly **lower** than comparison group(s).

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 to Welcome Visitors by Demographics

(Total Very/Somewhat Concerned, Wave 26 – May 12, 2021)

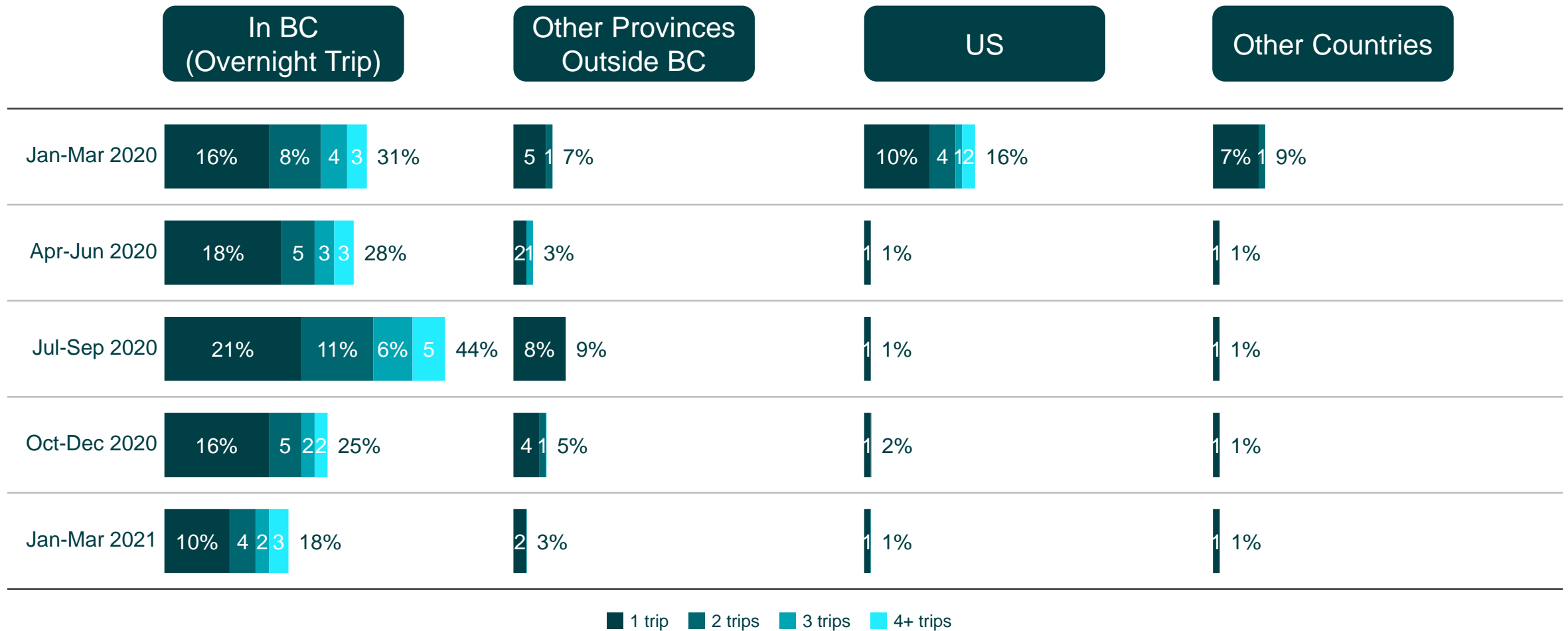


 Statistically significantly **higher** than comparison group(s).
 Statistically significantly **lower** than comparison group(s).

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



■ 1 trip ■ 2 trips ■ 3 trips ■ 4+ trips

Base: All respondents

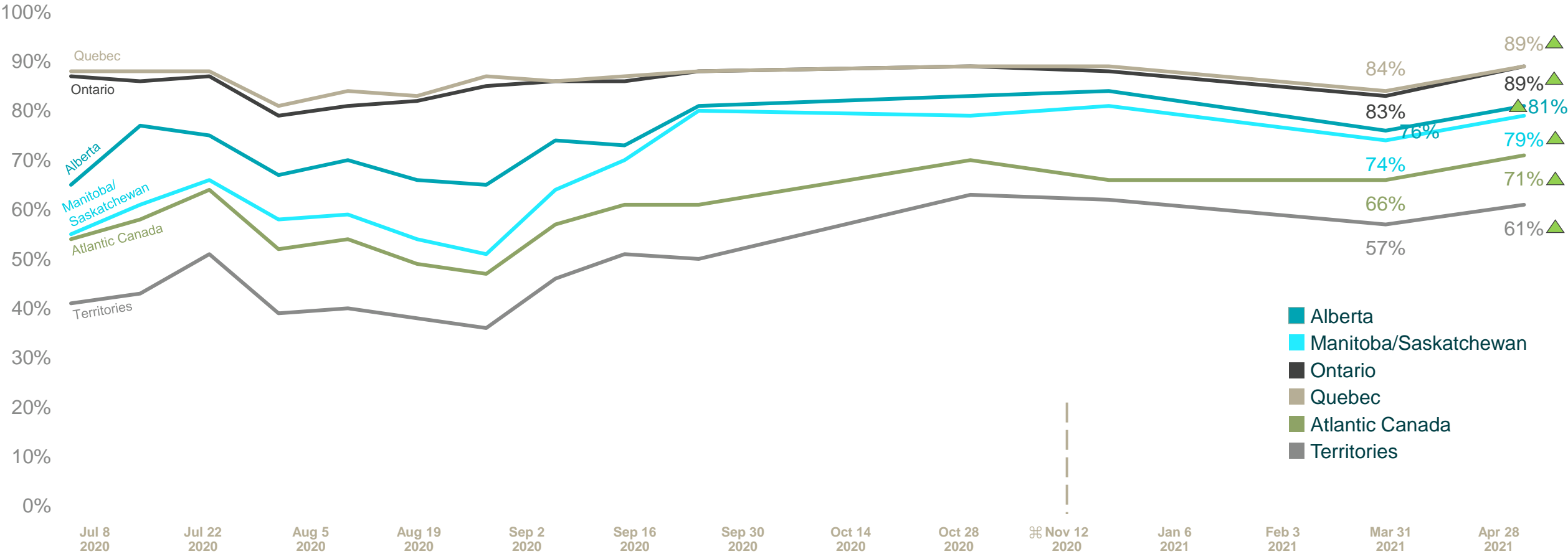
Note: Jan-Mar, Apr-Jun and Jul-Sep asked in Wave 14/Nov 12; Oct-Dec asked in Wave 17/Jan 6; Jan-Mar 2021 asked in Wave 23/Mar 31. D0. In the following time periods, how many trips, if any, did you take to the following destinations for leisure and/or visiting friends and family? (Please do not consider 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.

Tracking British Columbians' Concern Welcoming Canadian Visitors

(Total Very/Somewhat Concerned by Origin)



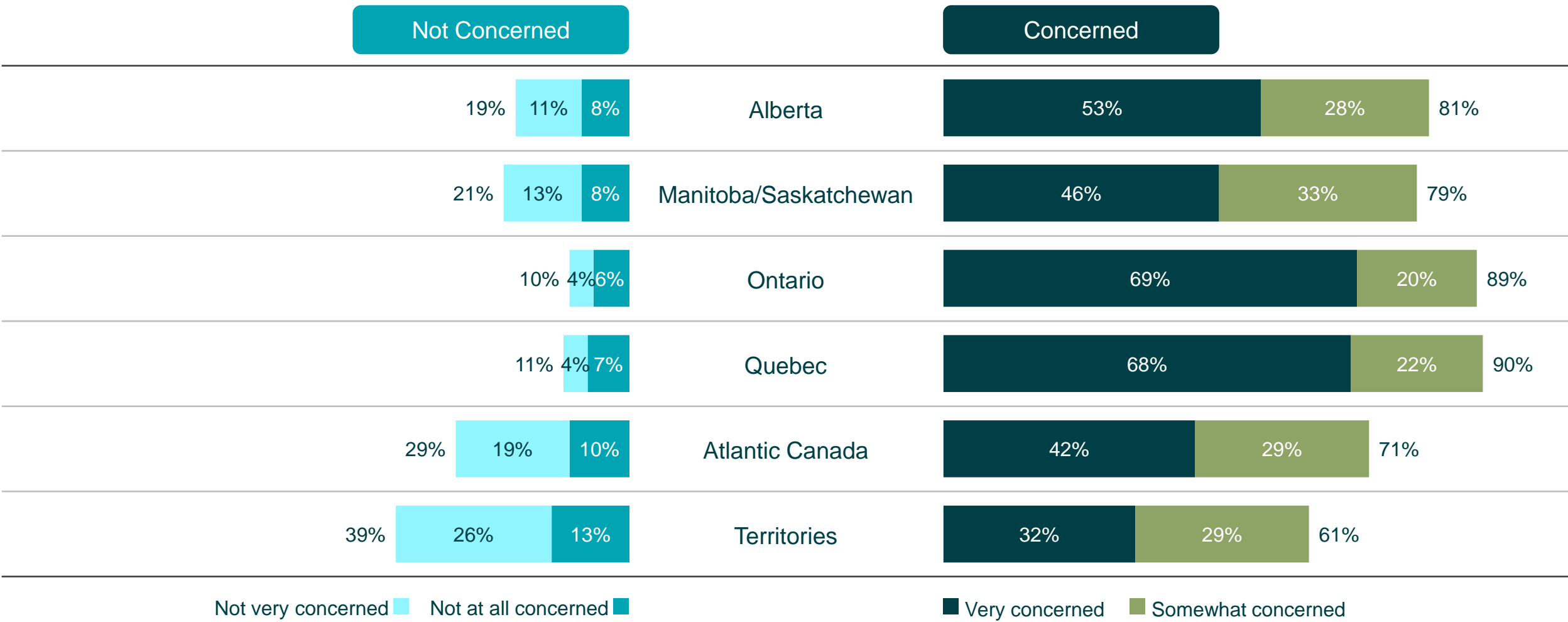
- Alberta
- Manitoba/Saskatchewan
- Ontario
- Quebec
- Atlantic Canada
- Territories

▲ 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 25 – April 28, 2021)

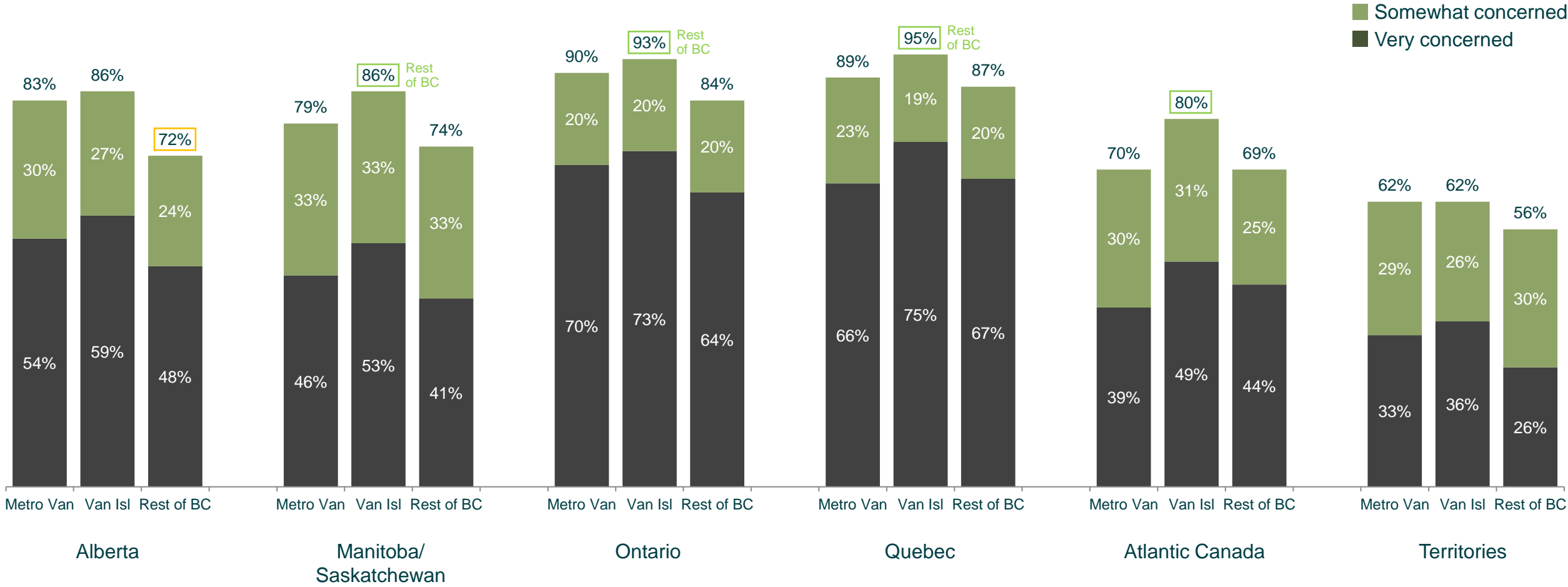


Not very concerned Not at all concerned Very concerned Somewhat concerned

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.

Snapshot of British Columbians' Concern Welcoming Canadian Visitors by Region

(Wave 25 – April 28, 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 **higher** than comparison group(s).
 Statistically significantly **lower** than comparison group(s).

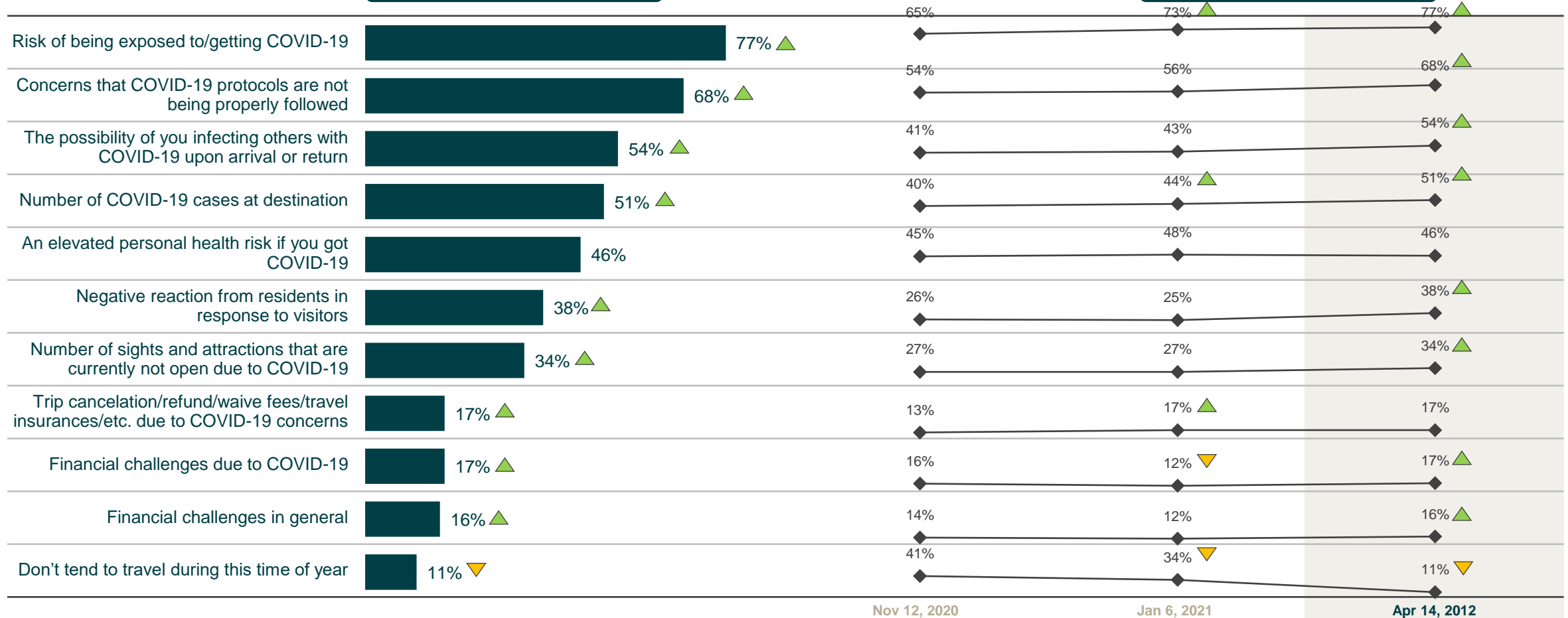
Reasons for Not Considering BC Travel (Aided)

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



April 14, 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?

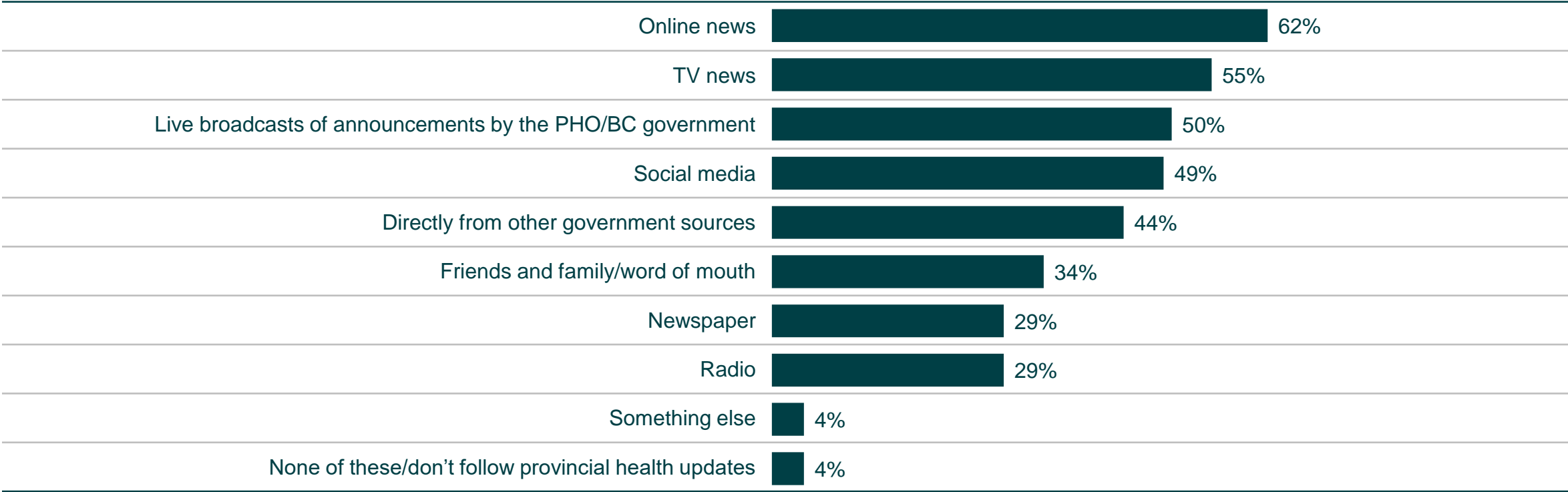
▲ Statistically significantly **higher** than previous wave.
 ▼ Statistically significantly **lower** than previous wave.

Source of Provincial COVID-19 Health Updates

(Wave 21: March 3, 2021)



March 3, 2021
(n=827)





DESTINATION
BRITISH COLUMBIA®

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

For more information, please contact:

Destination BC's Research and Analytics Team
Tourism.Research@DestinationBC.ca