



DESTINATION
BRITISH COLUMBIA®

BC Residents' Public Perceptions:
COVID-19 Travel and Tourism
Wave 36: September 29, 2021

Report prepared by Insights West

Table of Contents



BACKGROUND AND METHODOLOGY	3
KEY HIGHLIGHTS	4
DETAILED FINDINGS	6
Travel Intent	6
Concern Welcoming Visitors	12
Comfort Levels by Activity/Transportation/Accommodation	15
APPENDIX: METRICS BY DEMOGRAPHICS	20
APPENDIX: PAST AD-HOC FINDINGS	23

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%
27	May 26-30, 2021	831	+/-3.4%
28	June 10-13, 2021	830	+/-3.4%
29	June 23-27, 2021	808	+/-3.4%
30	July 7-10, 2021	822	+/-3.4%
31	July 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%

KEY HIGHLIGHTS – WHAT’S NEW OR CHANGED



TRAVEL INTENTIONS (SLIDES 6-11)

- British Columbians’ intent to travel within BC is slightly up versus two weeks ago. While most changes are directional rather than statistically significant, the results indicate a slightly higher willingness to travel within the province.
 - BC residents’ intent to travel in BC for a day trip increased +2 points to 55% within the next 4 week time period, and increased +4 points to 74% within the next 2-3 month time period.
 - BC residents’ intent to travel in BC for an overnight trip increased a +2 points to 29% within the next 4 week time period. and increased +7 points to 56% within the next 2-3 month period.
- BC residents’ intent to travel to other provinces remained relatively flat this wave, as is intended travel to the US.
- BC residents’ intent to travel to other countries has increased slightly. Currently, 5% of BC residents intend to travel to other countries in the next 4 weeks, up +2 points from last wave, and 10% of BC residents intend to travel to other countries within the next 2-3 months, up +2 points from last wave.
- This wave, a periodic metric that investigates barriers to travel among those who don’t plan to travel within BC was repeated for the first time since July 7, 2021. Compared to the last measure in the summer, simply not travelling at this time of year is a more common reason to not travel, up +22 points to 32%. In contrast, concern about the number of COVID-19 cases at their destination has also increased +13 points to 46%. In all waves, concern about contracting COVID-19 remains the top reason for not planning travel at 59% this wave, similar to last wave in July.

KEY HIGHLIGHTS – WHAT’S NEW OR CHANGED

CONCERN WELCOMING VISITORS (SLIDES 12-14)

- BC residents' concern welcoming visitors from most areas declined gradually this wave, with concern welcoming visitors from other countries, the US, and other parts of BC each decreasing -3 points to 81%, 77% and 51%, respectively.
- Concern welcoming visitors from other parts of Canada decreased -1 point to 70%, whereas concern welcoming visitors from nearby communities rose +2 points to 40%.

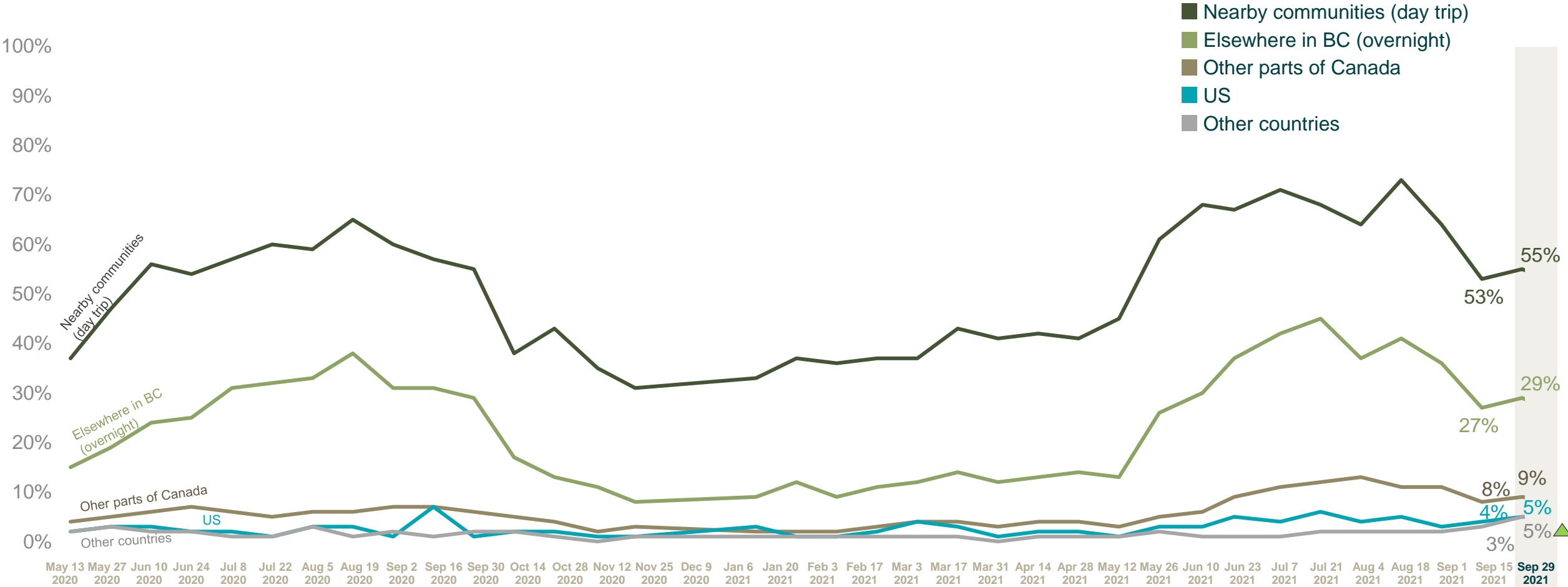
COMFORT WITH ACTIVITIES/MODES OF TRANSPORTATION (SLIDES 15-19)

- Comfort levels with many activities has increased from two weeks ago, reversing the downward trend seen over the past few waves. A few metrics are now at historical highs for the study. Most notably this wave:
 - Comfort with going to the beach increased +5 points to 91%.
 - Comfort with outdoor tourist activities increased +6 points to 80%
 - Comfort with taking an airplane for non-essential travel increased +6 points to 47%, a historical high.
 - Comfort with taking a cruise increased +5 points to 29%.
 - Comfort with staying at a hotel/motel increased +8 points to 71%, a historical high.
 - Comfort staying at shared economy accommodations increased +10 points to 58%, a historical high.

TRAVEL INTENT

Tracking British Columbians' Travel Intent Within Next 4 Weeks

(By Destination)



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

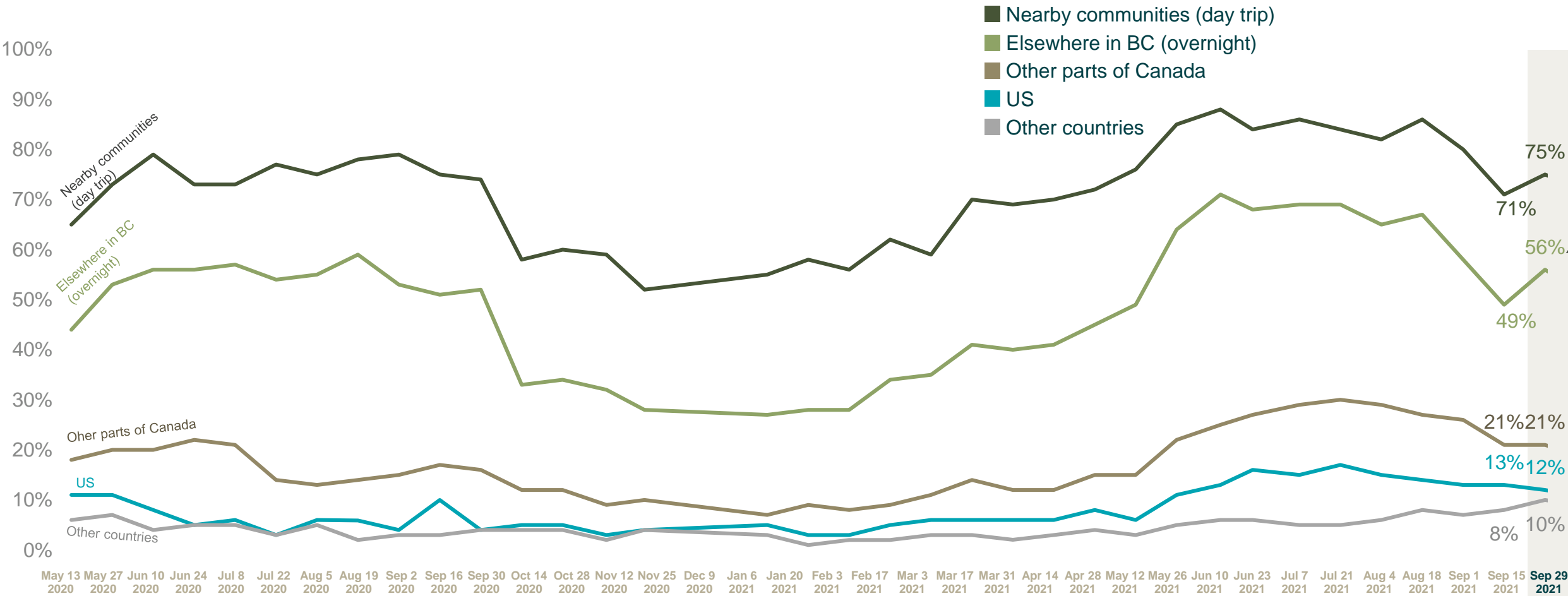
Base: All respondents

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

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

Tracking British Columbians' Travel Intent Within Next 2-3 Months

(By Destination)

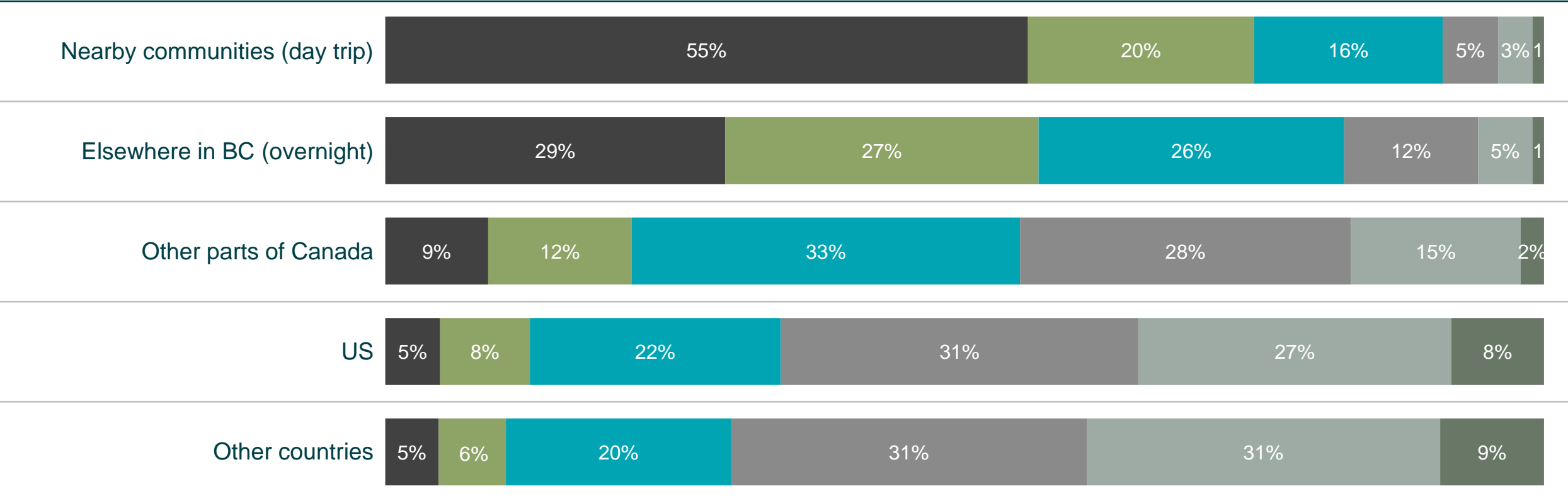


NOTE: Response category "only when vaccine or treatment for COVID-19 available" removed Jun 23, 2021.
 Base: All respondents
 D3. When, if at all, are you likely to make trips to the following destinations?
 Due to rounding, the total may not equal 100% to the sum of individual values shown.

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

Snapshot Of British Columbians' Travel Intentions

(Wave 36 – Sept 29, 2021)

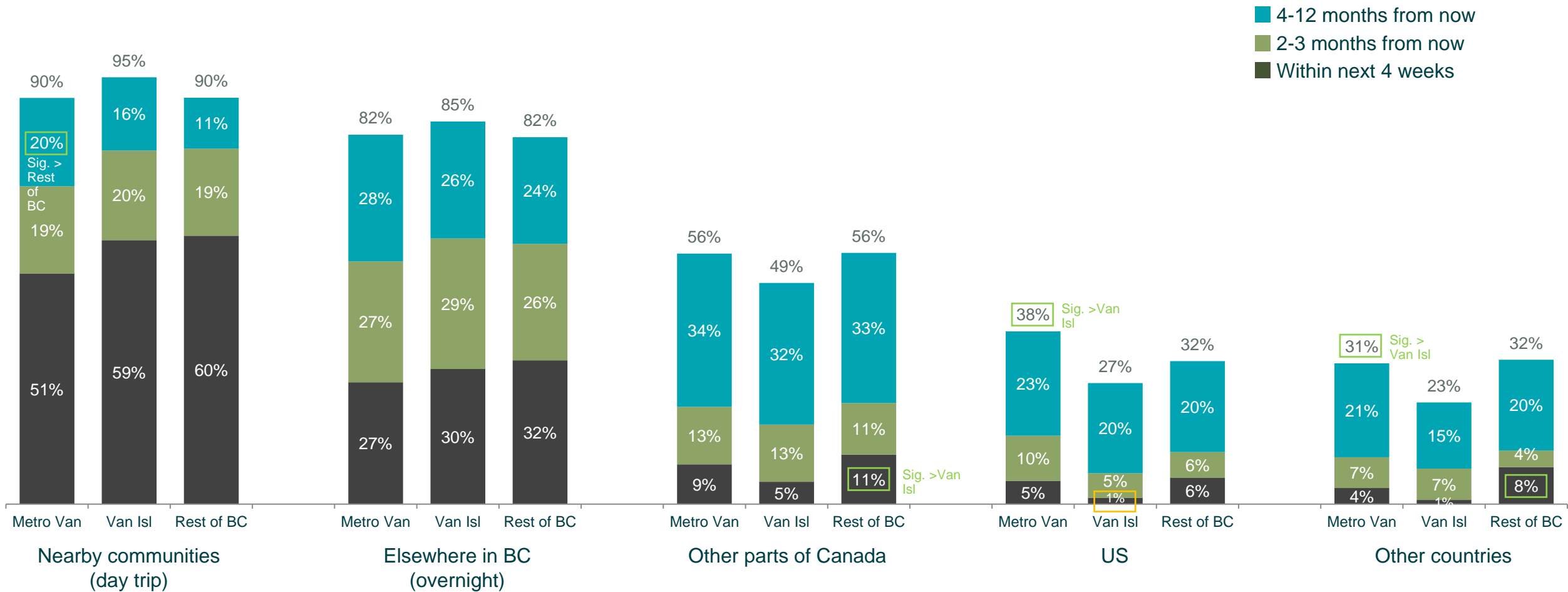


Within next 4 weeks
 2-3 months from now
 4-12 months from now
 Within 2 years
 Not sure, but longer than 2 years
 Never

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 36 – Sept 29, 2021)



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.

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

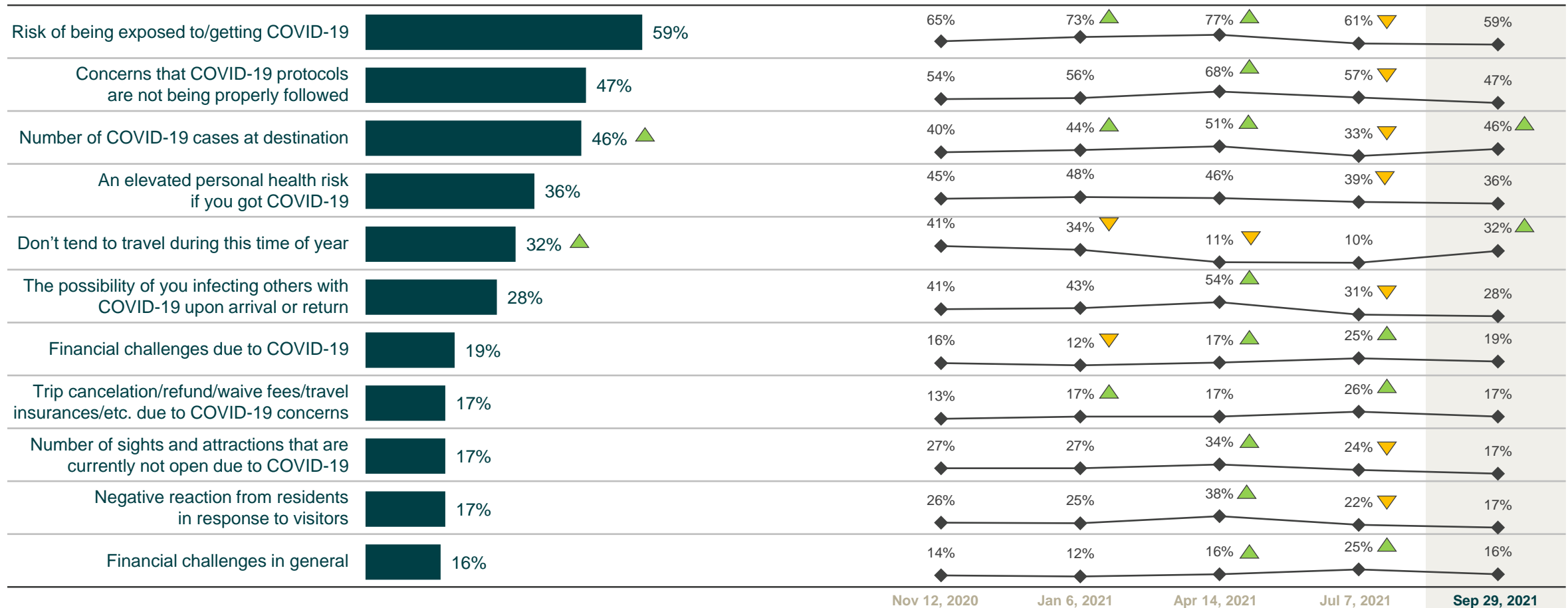
Reasons For Not Considering Future BC Travel (Aided)

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



Sept 29, 2021

Tracking



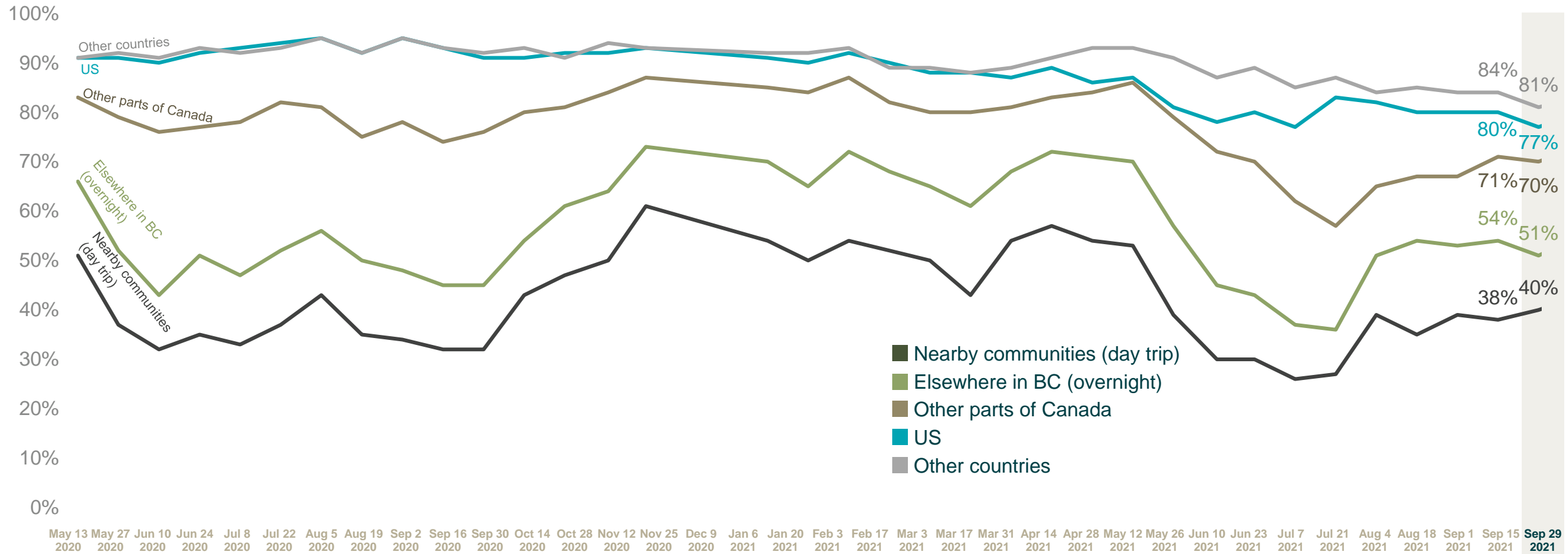
Base: Those who are not likely to take a daytrip in BC or an overnight trip in BC in the next 3 months
 D4. Why are you not likely to travel in BC for a day trip or an overnight trip in the next 3 months?

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

CONCERN WELCOMING VISITORS

Tracking British Columbians' Concern Welcoming Visitors

(Total Very/Somewhat Concerned By Visitor Origin)

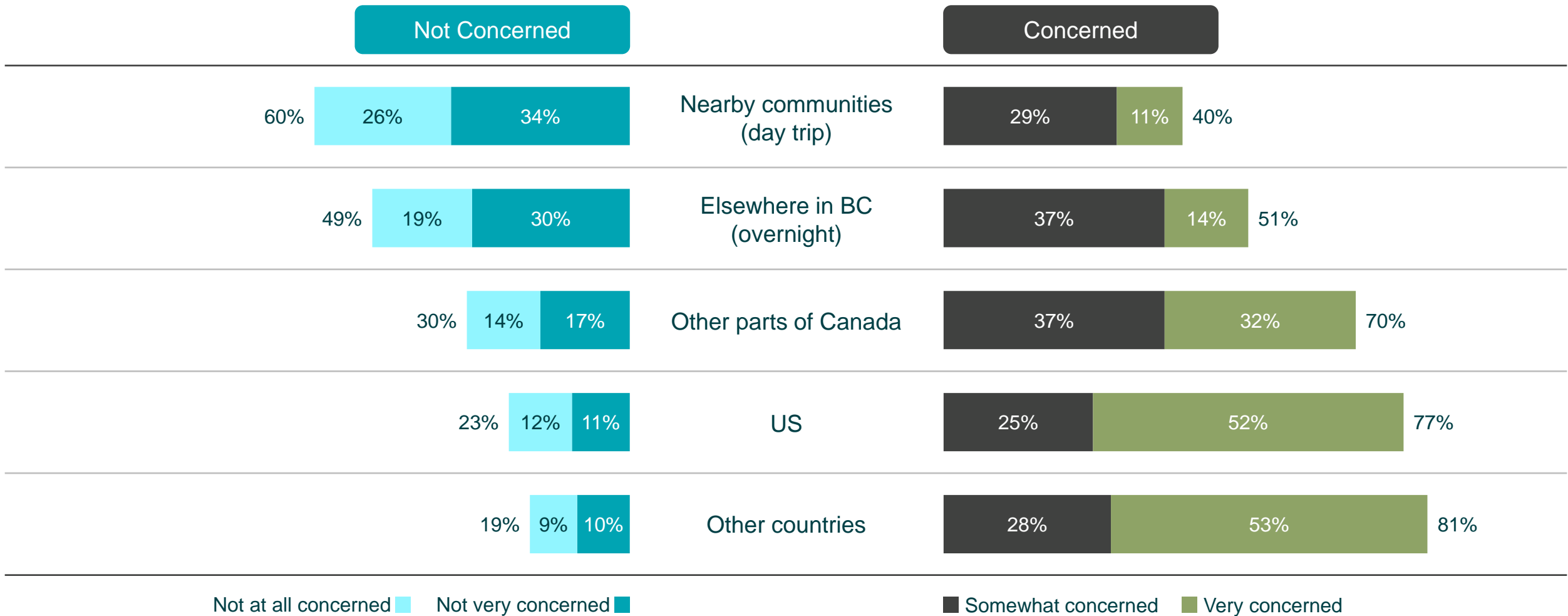


Base: All respondents
 D2. Given the current situation with COVID-19, how concerned would you be with the following types of visitors making non-essential trips into your community over the next few weeks?

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

Snapshot Of British Columbians' Concern Welcoming Visitors

(Wave 36 – Sept 29, 2021)



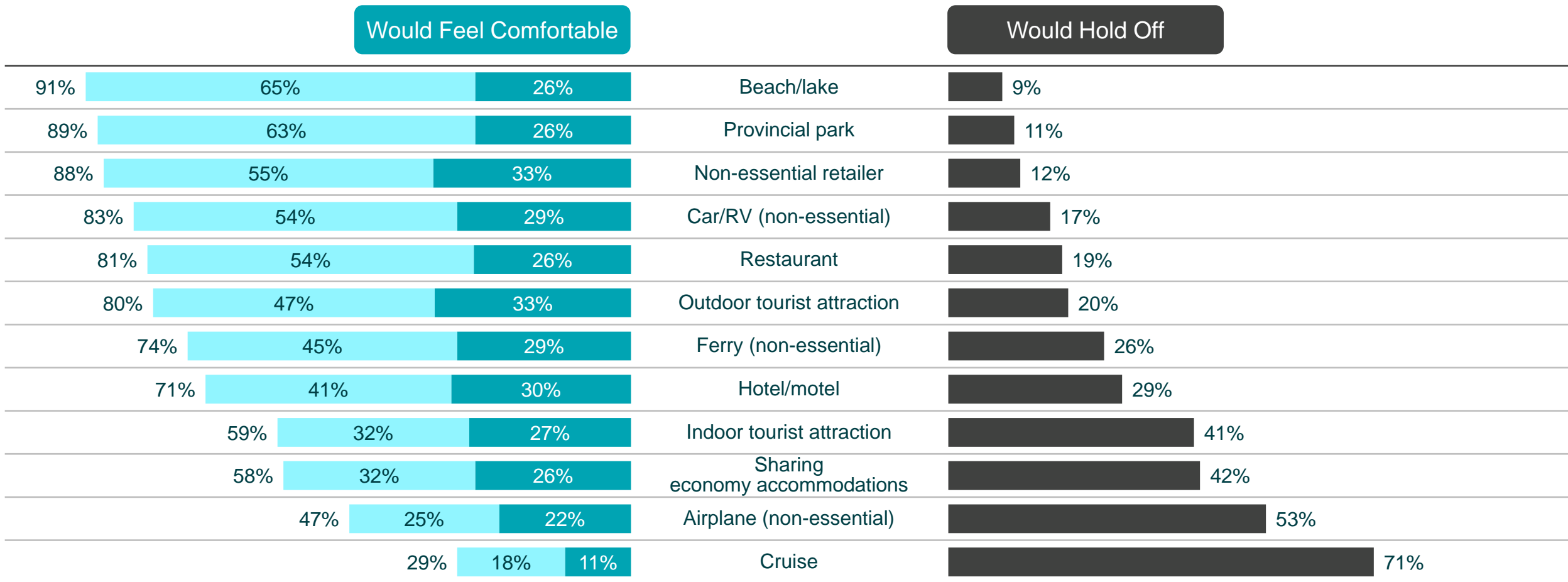
Not at all concerned ■ Not very concerned ■ Somewhat concerned ■ Very concerned

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 36 – Sept 29, 2021)



Definitely would feel comfortable ■ Probably would feel comfortable ■

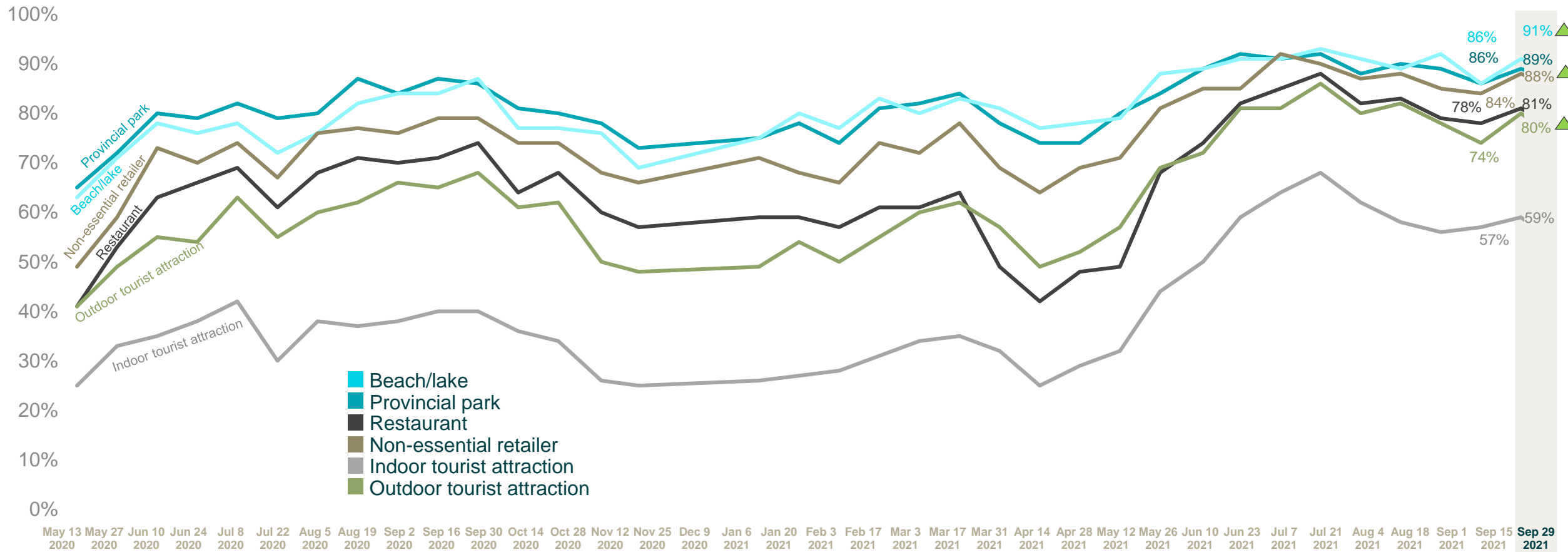
■ Would hold off longer due to concerns

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)

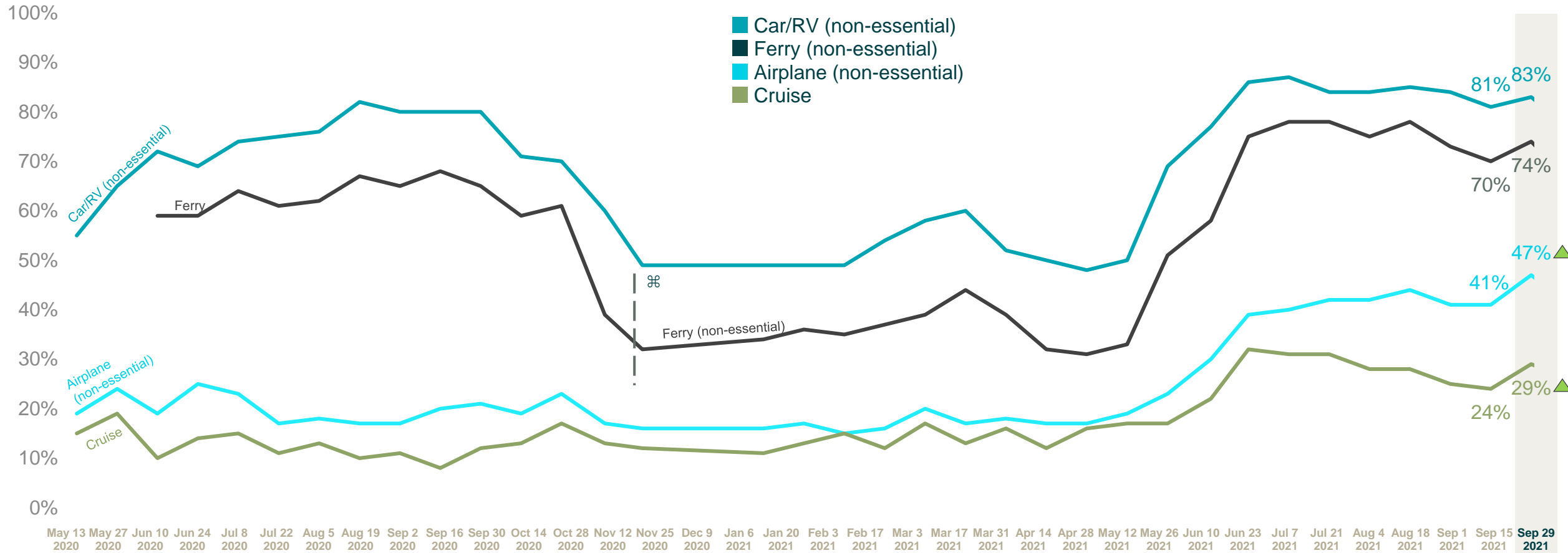


▲ Statistically significantly **higher** than previous wave.
▼ Statistically significantly **lower** than previous wave.

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

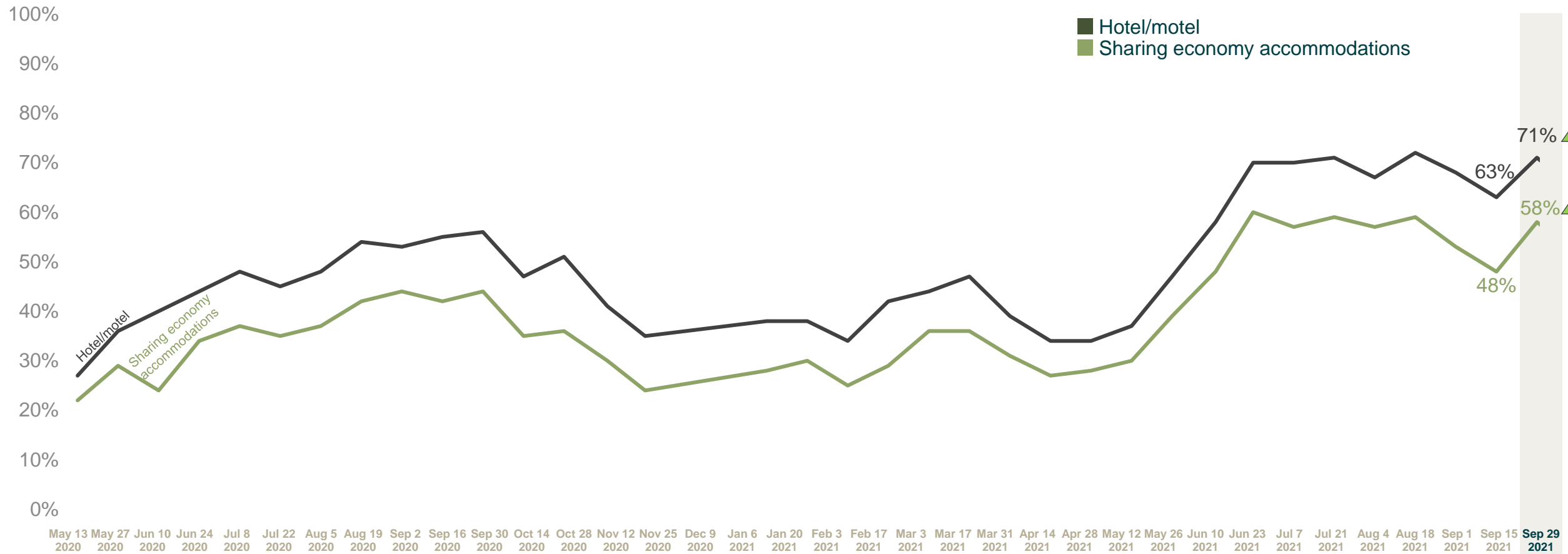
D1. Would be comfortable doing/using each of the following in the next few weeks, or are you likely to hold off longer due to concerns about COVID-19?

▲ 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?

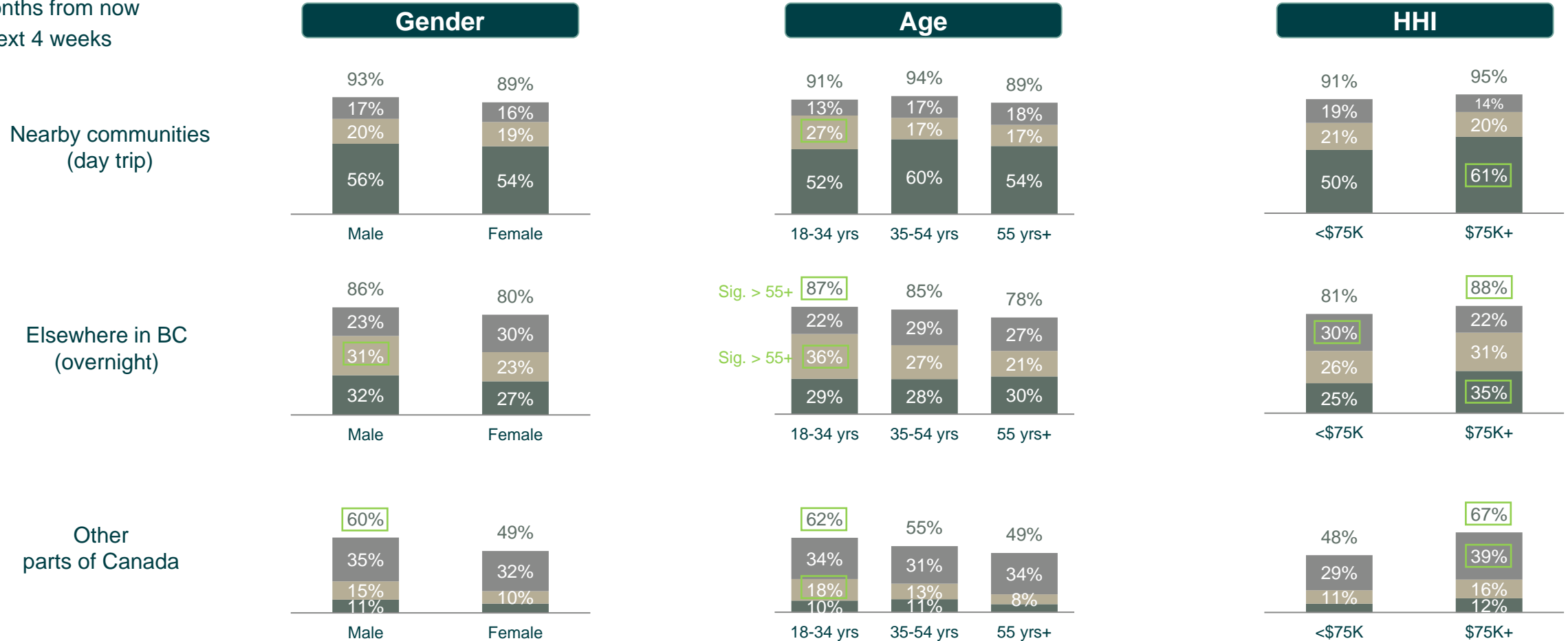
APPENDIX: METRICS BY DEMOGRAPHICS

Snapshot Of British Columbians' Travel Intent By Demographics

(Wave 36 – Sept 29, 2021)



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

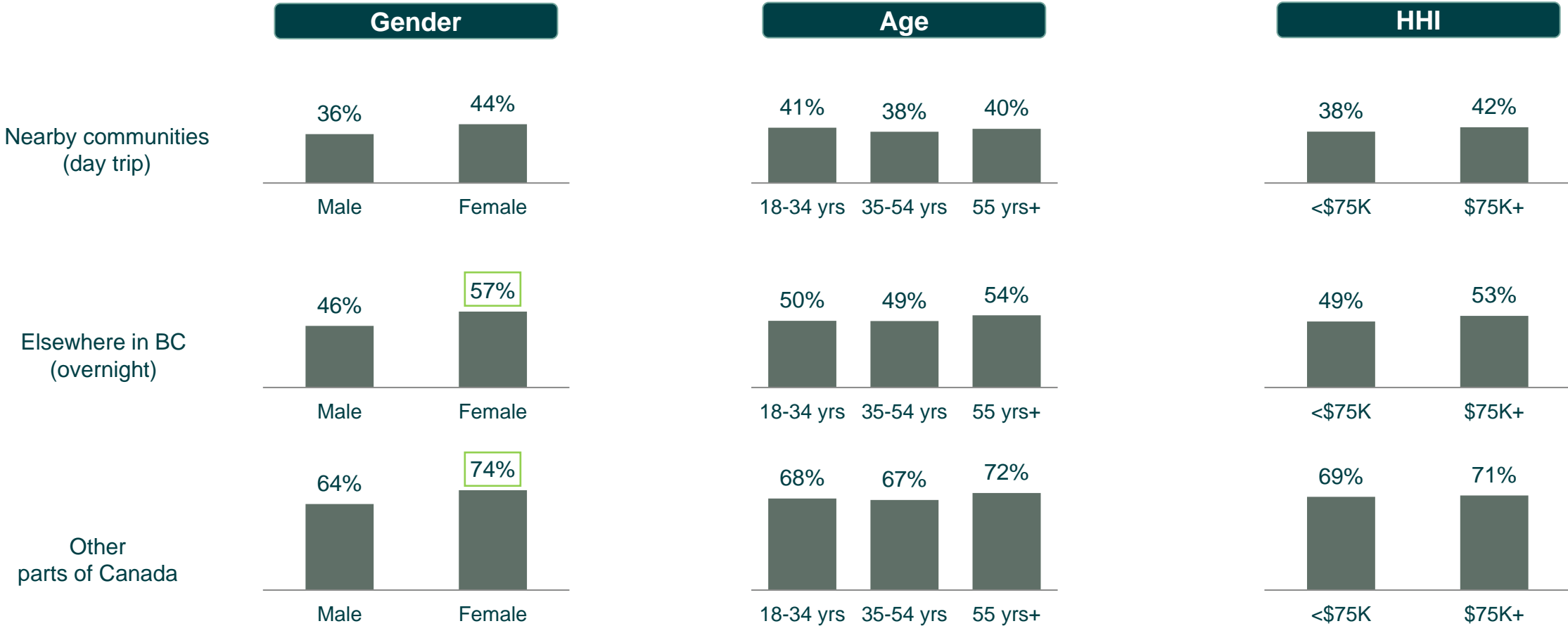


Base: All respondents
 D3. When, if at all, are you likely to make trips to the following destinations?
 Due to rounding, the total may not equal 100% to the sum of individual values shown.

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

Snapshot Of British Columbians' Concern Welcoming Visitors By Demographics

(Total Very/Somewhat Concerned, Wave 36 – Sept 29, 2021)

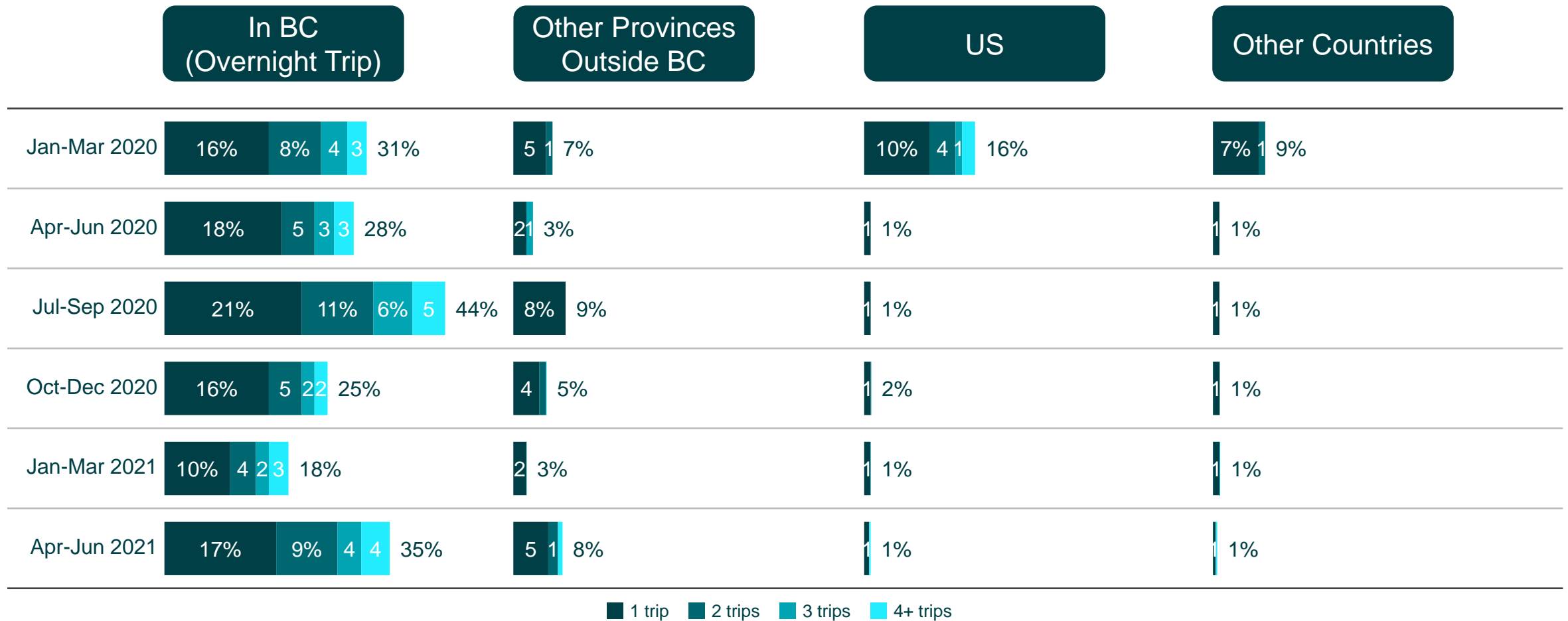


 Statistically significantly **higher** than comparison group(s).
 Statistically significantly **lower** than comparison group(s).

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; Apr-Jun 2021 asked in Wave 30/July 7, 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).

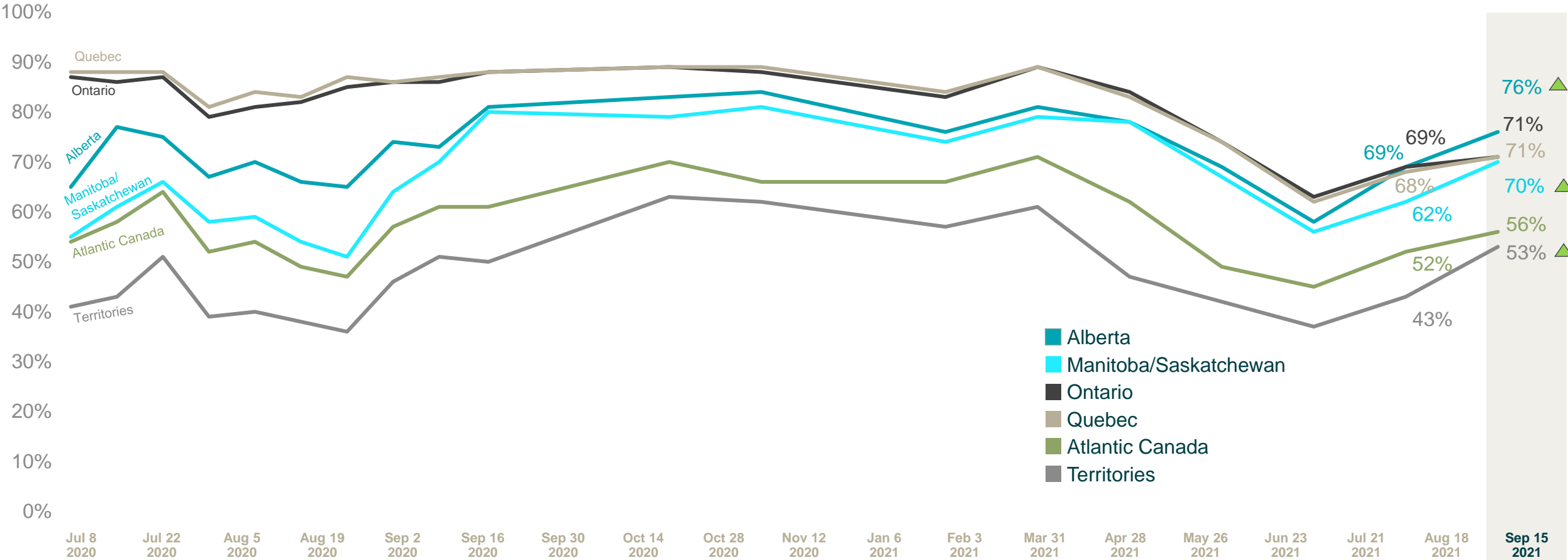
Due to rounding, the sum of the individual values shown may not add up to the total shown.

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

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

Tracking British Columbians' Concern Welcoming Canadian Visitors

(Total Very/Somewhat Concerned By Origin)

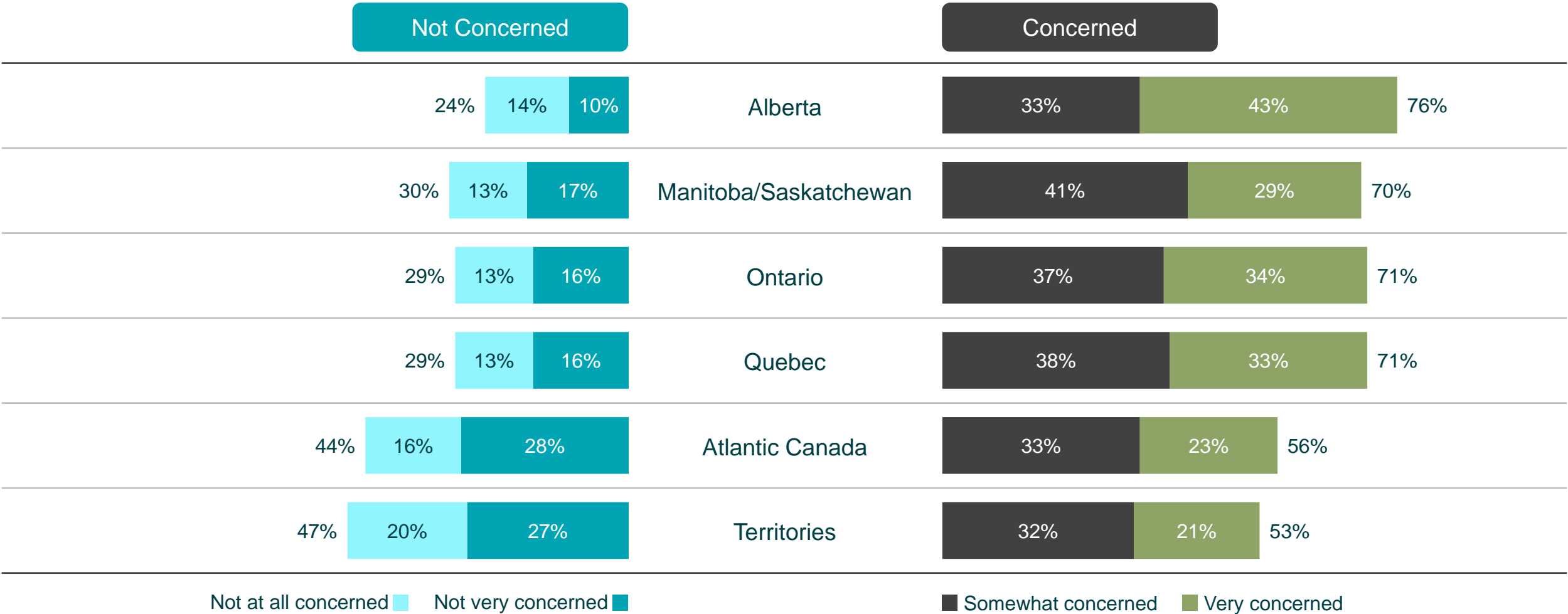


▲ Statistically significantly **higher** than previous wave.
 ▼ Statistically significantly **lower** than previous wave.

⌘ 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 35 – Sept 15, 2021)



Not at all concerned ■ Not very concerned ■ Somewhat concerned ■ Very concerned

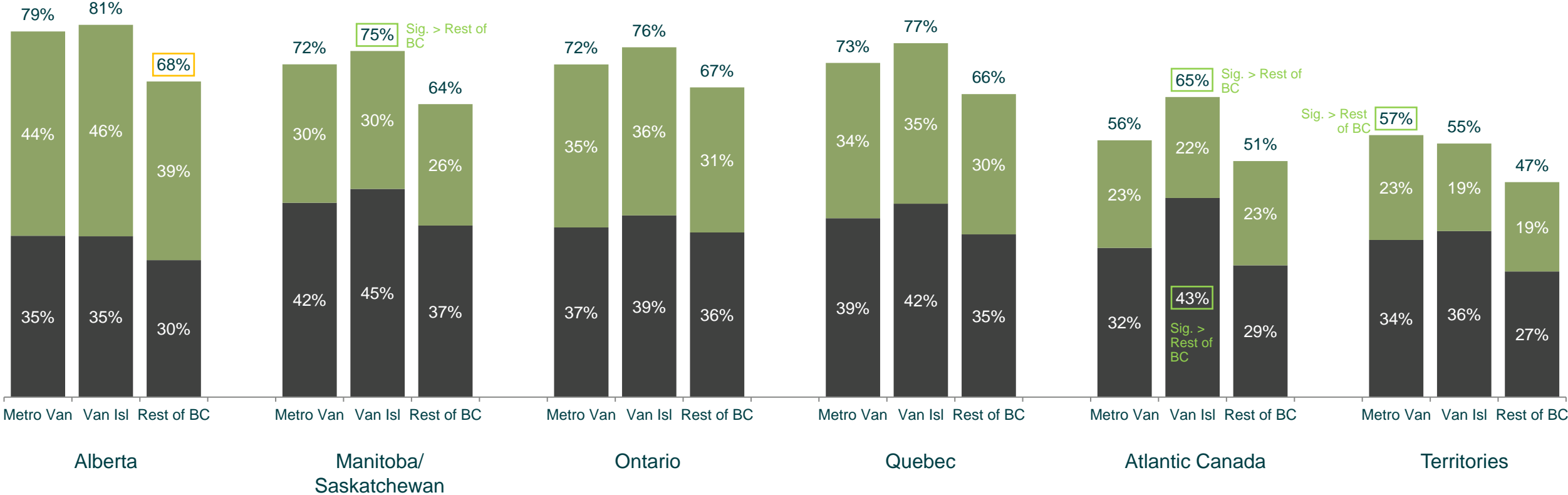
Base: All respondents
 D2a. And how concerned would you be with the following types of Canadian visitors making non-essential trips into your community over the next few weeks?
 Due to rounding, the sum of the individual values shown may not add up to the total shown.

Snapshot Of British Columbians' Concern Welcoming Canadian Visitors By Region

(Wave 35 – Sept 15, 2021)



Very concerned
Somewhat concerned

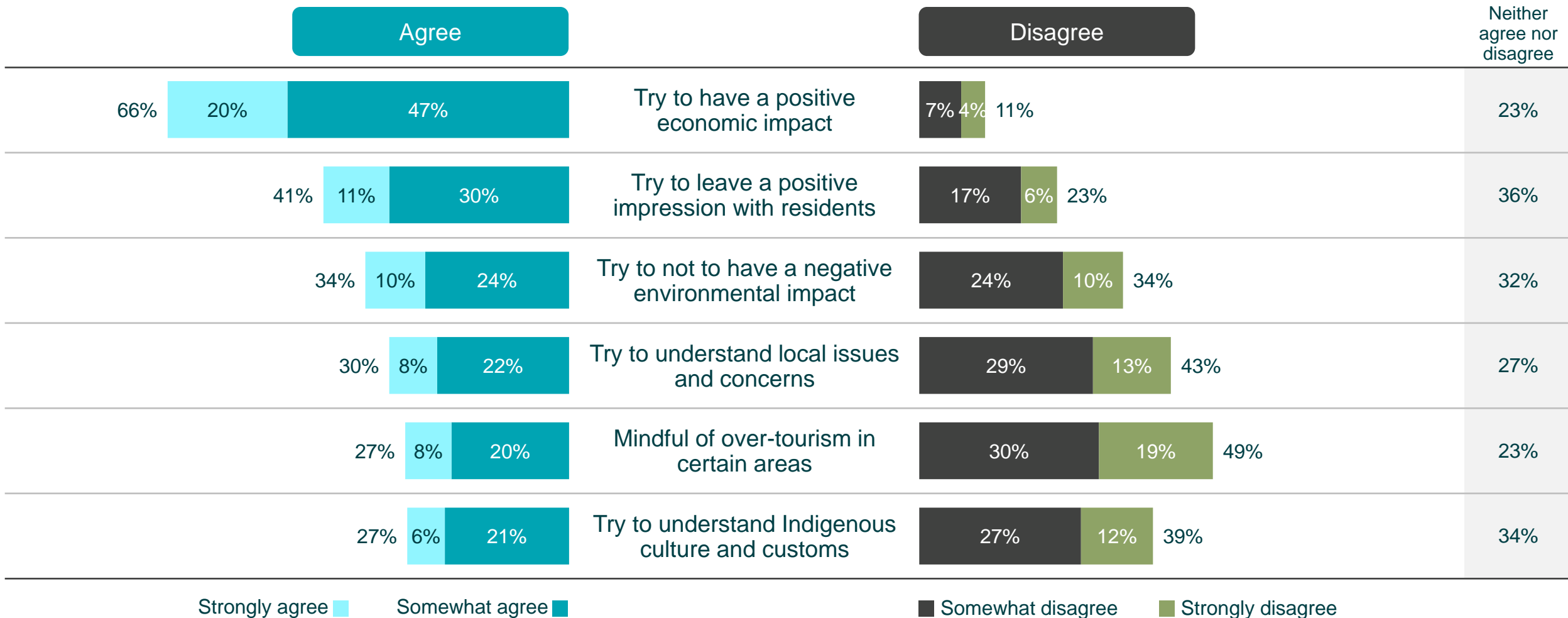


Base: All respondents
D2a. And how concerned would you be with the following types of Canadian visitors making non-essential trips into your community over the next few weeks?
Due to rounding, the sum of the individual values shown may not add up to the total shown.

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

British Columbians' Views On Visitors

(Wave 32 – August 4, 2021)



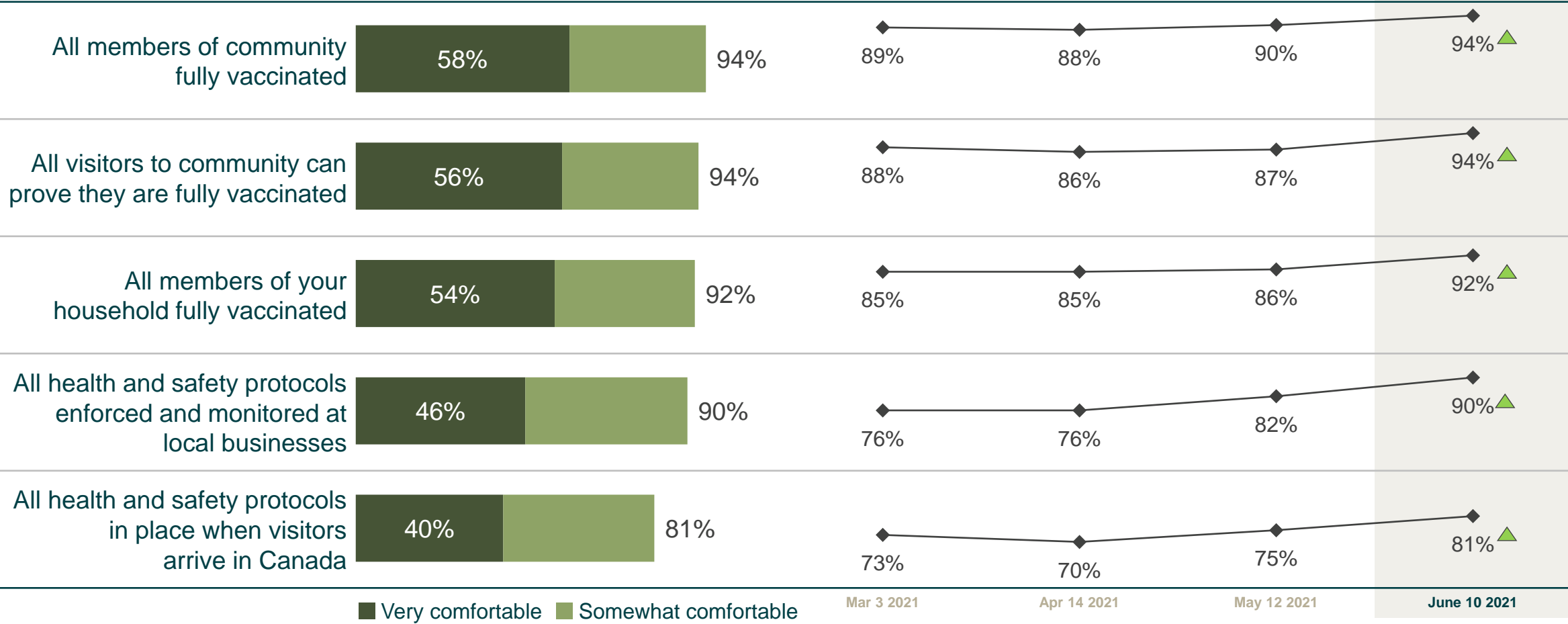
Base: All respondents
 D11. How much do you agree or disagree with each of the following statements?
 Due to rounding, the sum of the individual values shown may not add up to the total shown.

Comfort With Welcoming Visitors Under Various Circumstances



June 10, 2021

Tracking



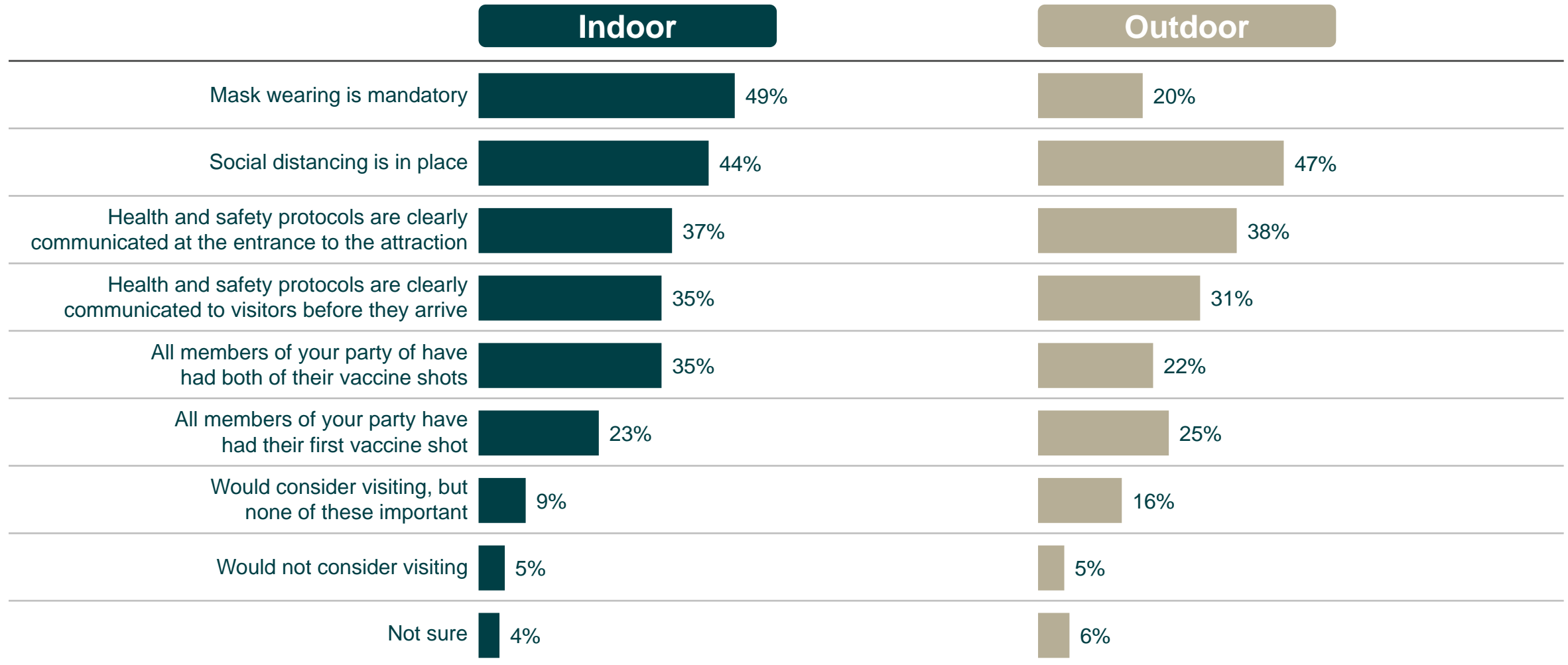
■ Very comfortable ■ Somewhat comfortable

▲ 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)

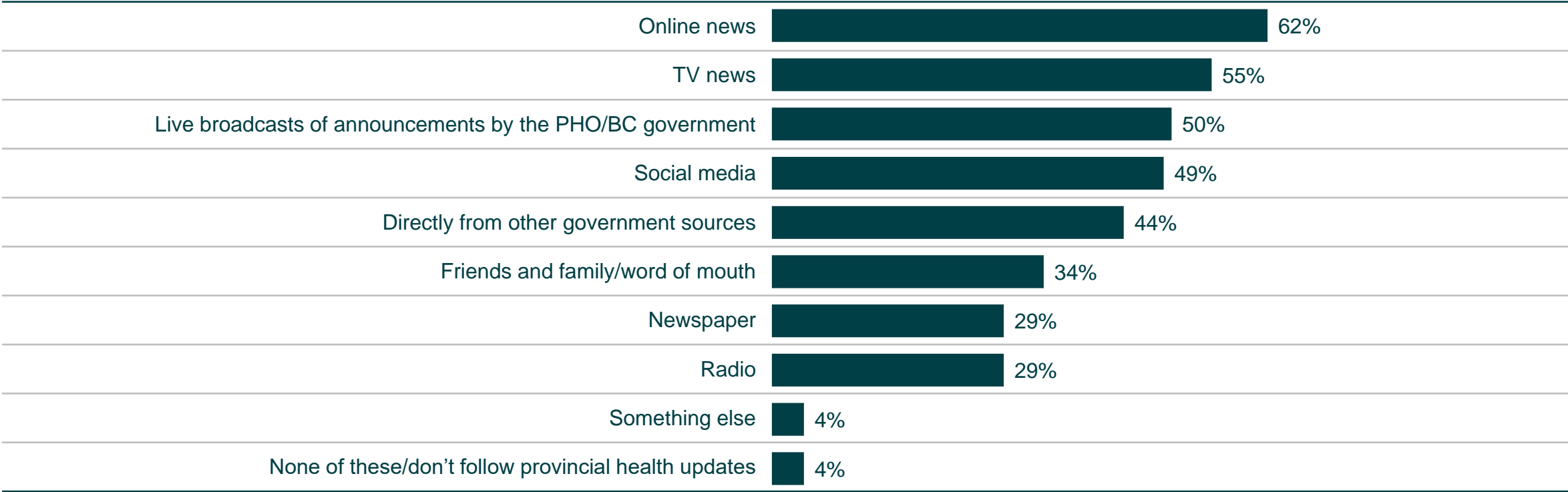


Source Of Provincial COVID-19 Health Updates

(Wave 21 - March 3, 2021)

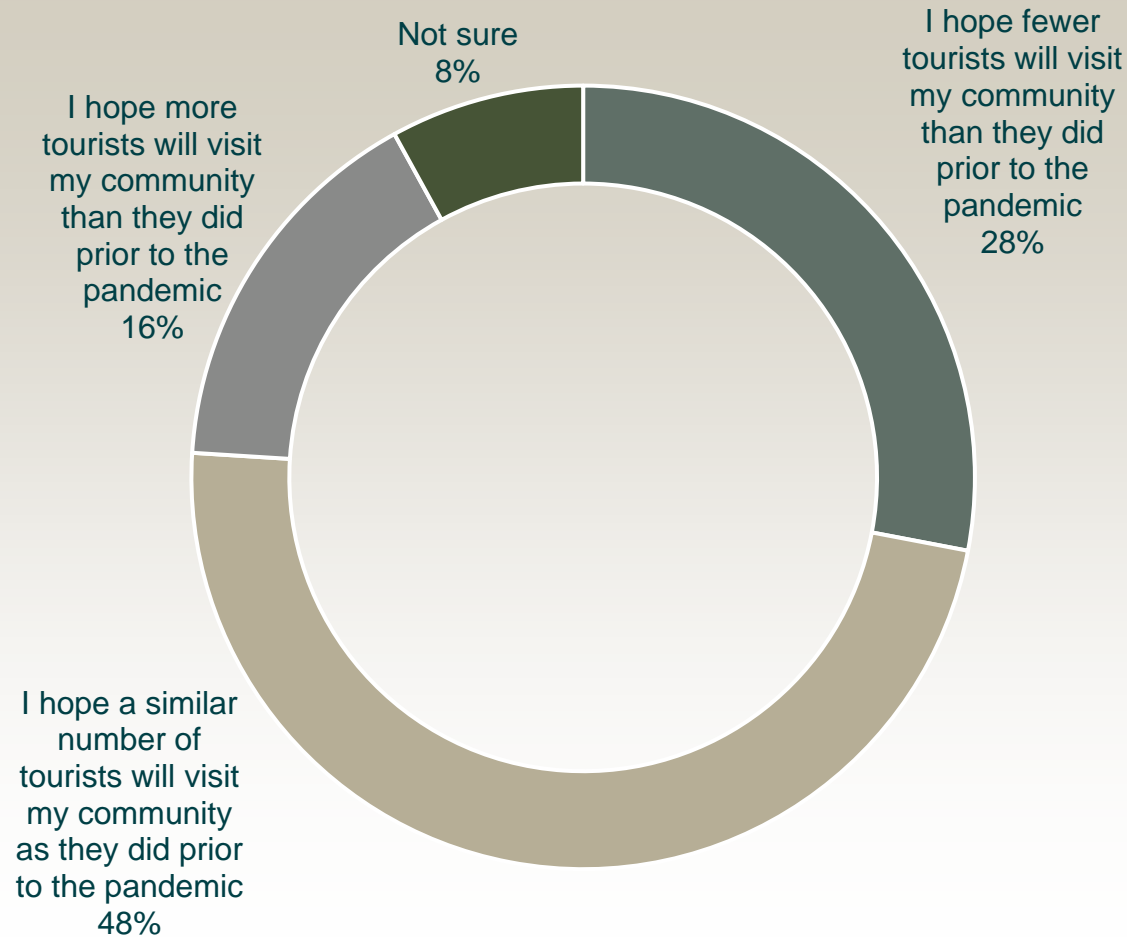


March 3, 2021
(n=827)



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?

Impact Of Wildfires/Smoke On Residents' BC Travel Plans

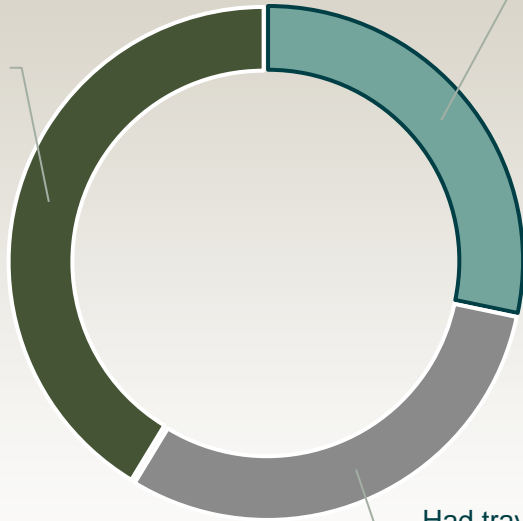
(Wave 34 – Sept 1, 2021)

28.3%

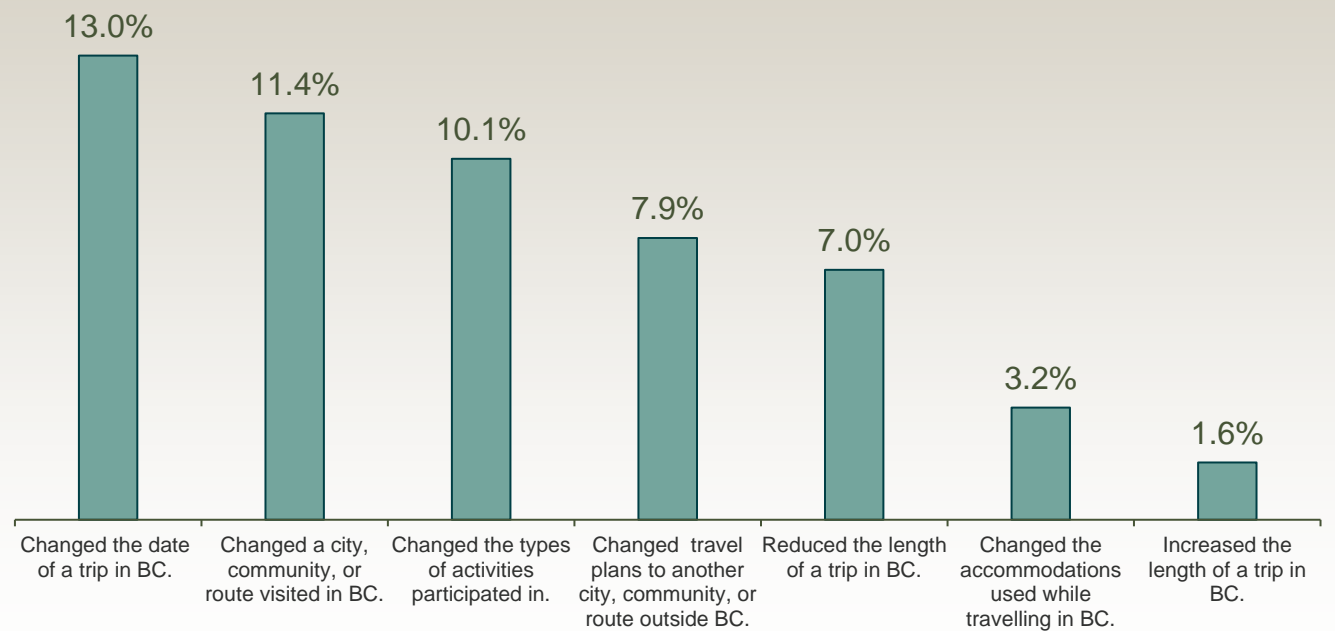
Travel plans impacted/changed



No travel plans in BC this year
41.3%



Had travel plans in BC this year, but not impacted by the wildfires/smoke
30.4%





DESTINATION
BRITISH COLUMBIA®

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

For more information, please contact:

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