

BC Residents' Public Perceptions:
COVID-19 Travel and Tourism
Wave 40: November 26, 2021

Report prepared by: Leger

Whistler, Vancouver, Coast, & Mountains

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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	Aug 19-23, 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%

KEY HIGHLIGHTS – WHAT'S NEW OR CHANGED



TRAVEL INTENTIONS (SLIDES 6-11)

- BC residents' travel intentions have decreased from two weeks ago, particularly travel within BC, both at the 4-week and 2-3 month interval. This is likely in part due to recent travel / fuel restrictions, rather than solely seasonality or elevated COVID-19 concerns.
 - Travel to nearby communities in BC decreased -14 points to 39% in the next 4 weeks and -15 points to 47% in the next 3 months. While the decrease is not quite as steep, it is also present for BC residents' intent to travel for overnight BC trips which decreased -4 points to 16% in the next 4 weeks, and -15 points to 33% in the next 3 months.
 - In contrast, travel intentions to other provinces, the US and other countries are less changed, although there is a softening indicated for all three in the next 3 months, which could be due to increased concerns about COVID-19.

CONCERN WELCOMING VISITORS (SLIDES 12-14)

- BC residents' concern welcoming visitors from various areas inside Canada is mostly flat for the second wave in a row.
- In contrast, there is a higher increase in concern welcoming visitors from other countries versus last wave, with concern welcoming US visitors having increased +4 points to 77% and concern welcoming international visitors having increased +7 points to 83%.

KEY HIGHLIGHTS – WHAT'S NEW OR CHANGED

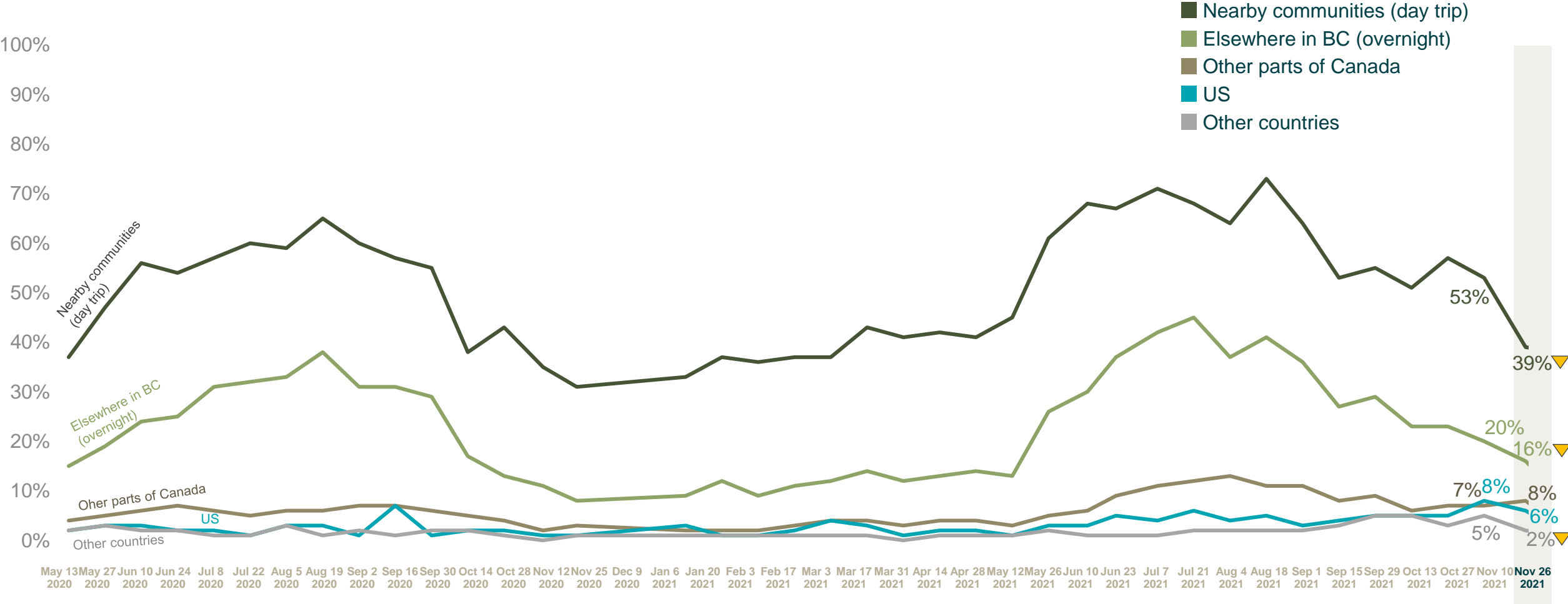
COMFORT WITH ACTIVITIES/MODES OF TRANSPORTATION (SLIDES 15-19)

- In keeping with slightly higher concerns about COVID and lower travel intentions compared to two weeks ago, comfort levels with various activities have decreased. The statistically significant changes from two weeks ago are as follows:
 - Comfort with visiting the beach decreased -5 points to 87%.
 - Comfort with visiting provincial parks decreased -6 points to 86%.
 - Comfort with visiting non-essential retailers decreased -5 points to 87%.
 - Comfort with visiting outdoor tourist attractions decreased -7 points to 77%.
 - Comfort with making non-essential trips by car/RV decreased -8 points to 79%.

TRAVEL INTENT

Tracking British Columbians' Travel Intent Within Next 4 Weeks

(By Destination)

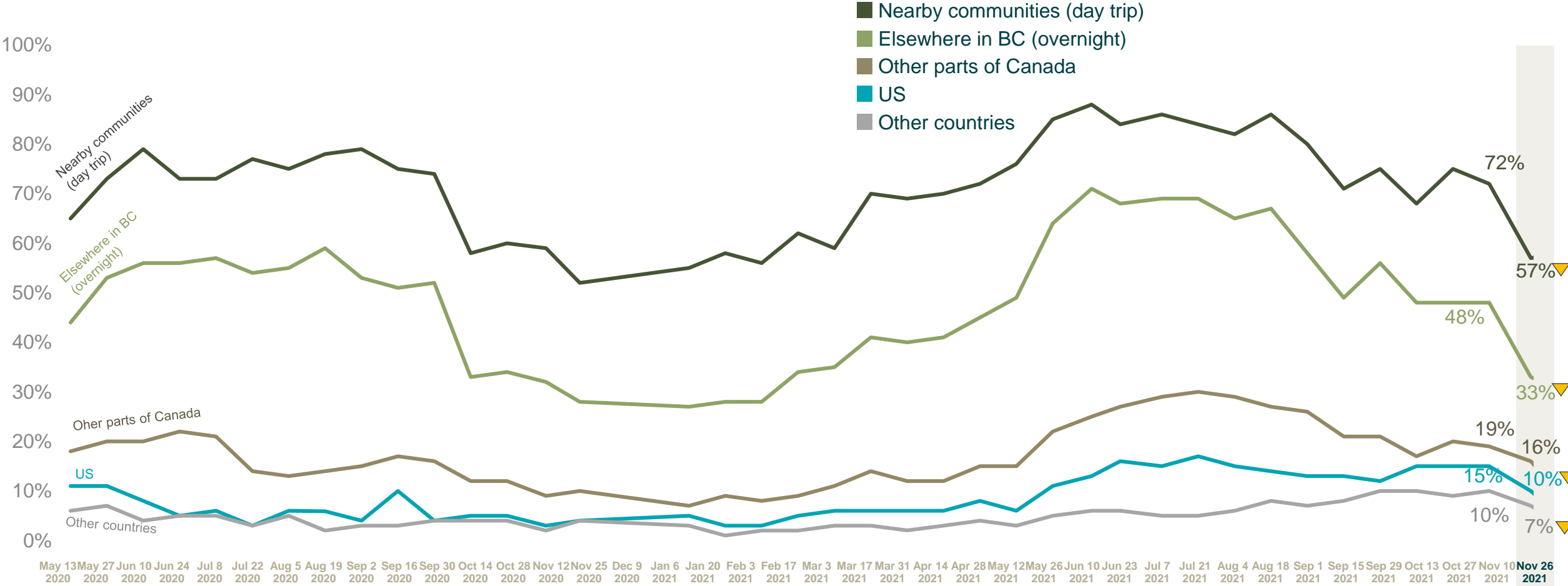


NOTE: Response category “only when vaccine or treatment for COVID-19 available” removed Jun 23, 2021.
Base: All respondents
D3. When, if at all, are you likely to make trips to the following destinations?

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

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

(By Destination)

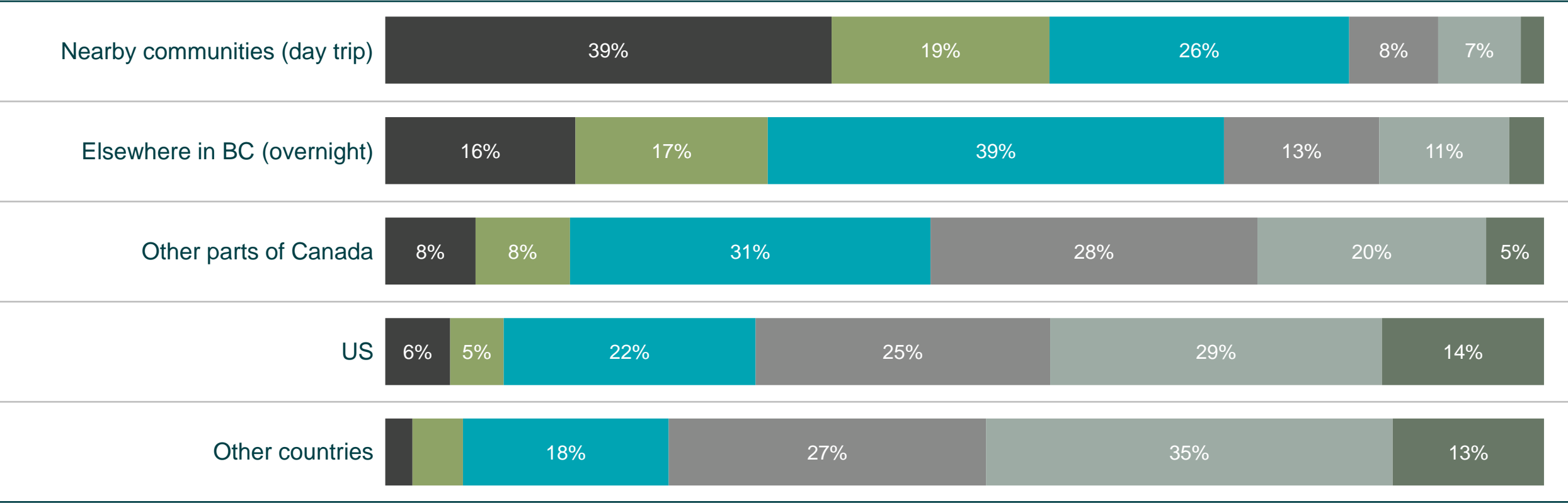


NOTE: Response category “only when vaccine or treatment for COVID-19 available” removed Jun 23, 2021.
Base: All respondents
D3. When, if at all, are you likely to make trips to the following destinations?
Due to rounding, the total may not equal 100% to the sum of individual values shown.

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

Snapshot Of British Columbians' Travel Intentions

(Wave 40 – Nov 26, 2021)

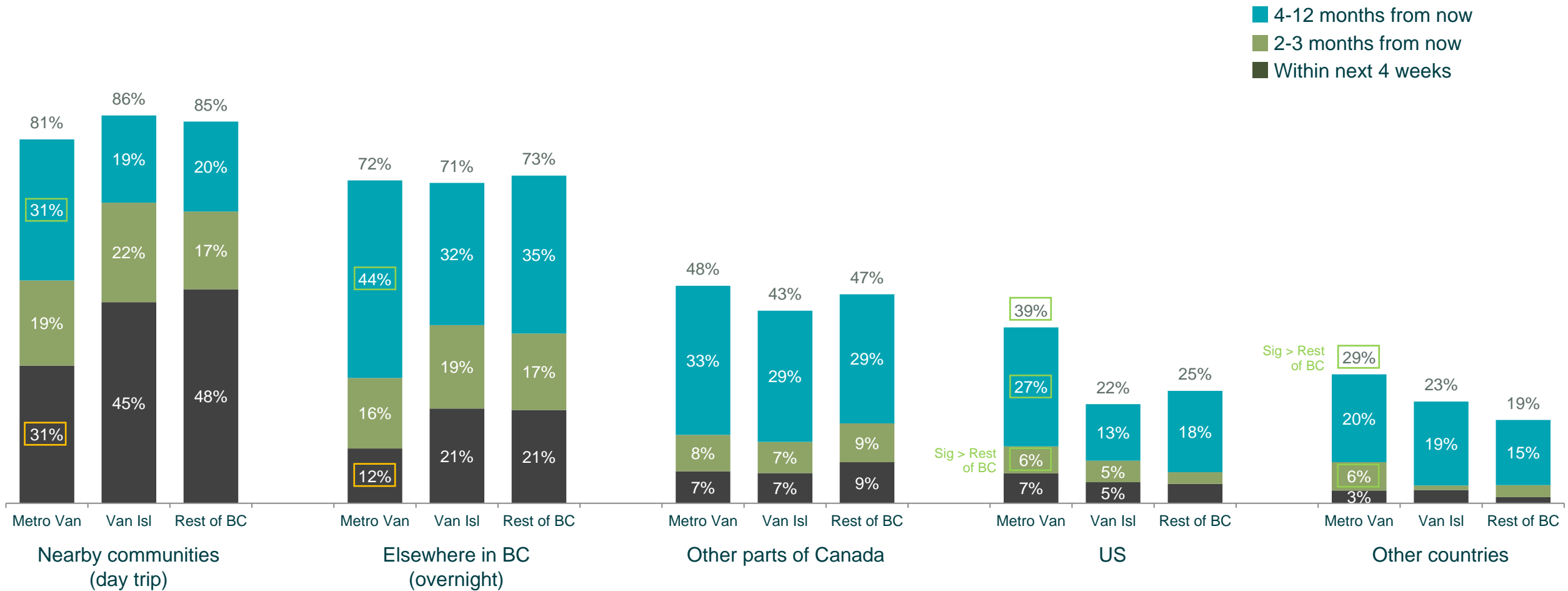


■ Within next 4 weeks ■ 2-3 months from now ■ 4-12 months from now ■ Within 2 years ■ Not sure, but longer than 2 years ■ Only if vaccine available ■ Never

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 40 – Nov 26, 2021)



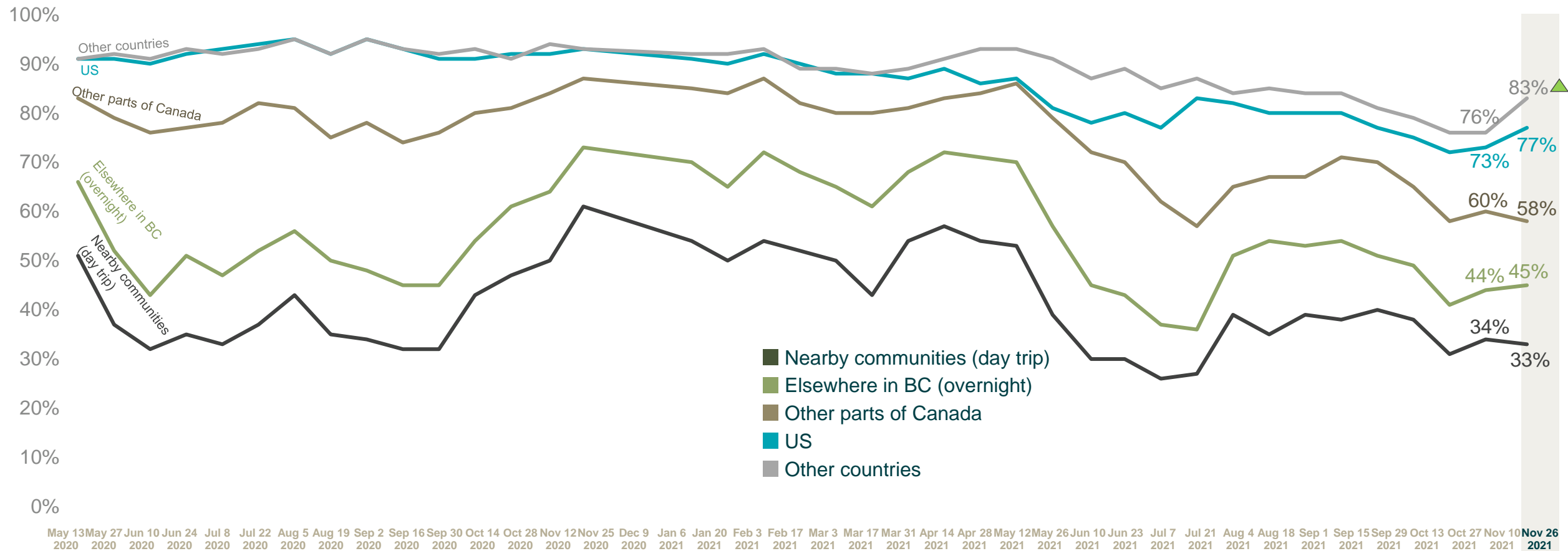
Base: All respondents
D3. When, if at all, are you likely to make trips to the following destinations?
Due to rounding, the sum of the individual values shown may not add up to the total shown.

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

CONCERN WELCOMING VISITORS

Tracking British Columbians' Concern Welcoming Visitors

(Total Very/Somewhat Concerned By Visitor Origin)

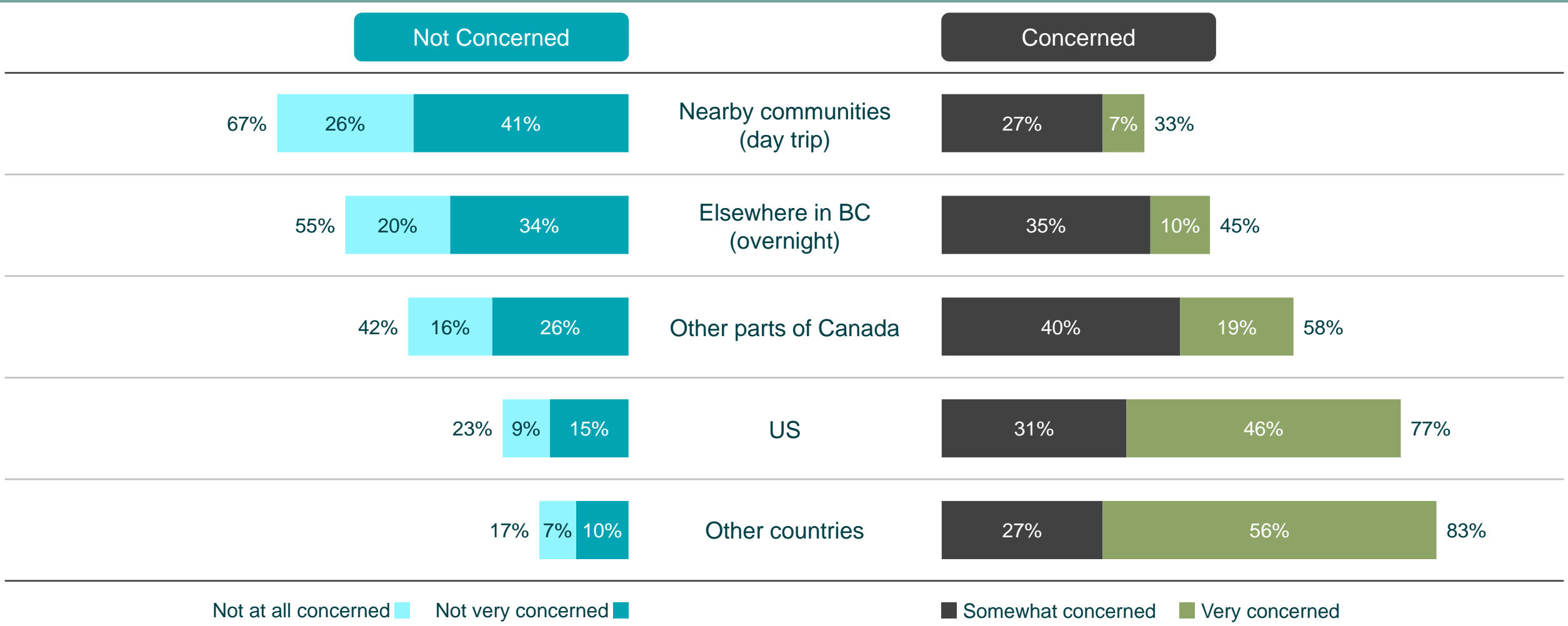


Base: All respondents
D2. Given the current situation with COVID-19, how concerned would you be with the following types of visitors making non-essential trips into your community over the next few weeks?

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

Snapshot Of British Columbians' Concern Welcoming Visitors

(Wave 40 – Nov 26, 2021)

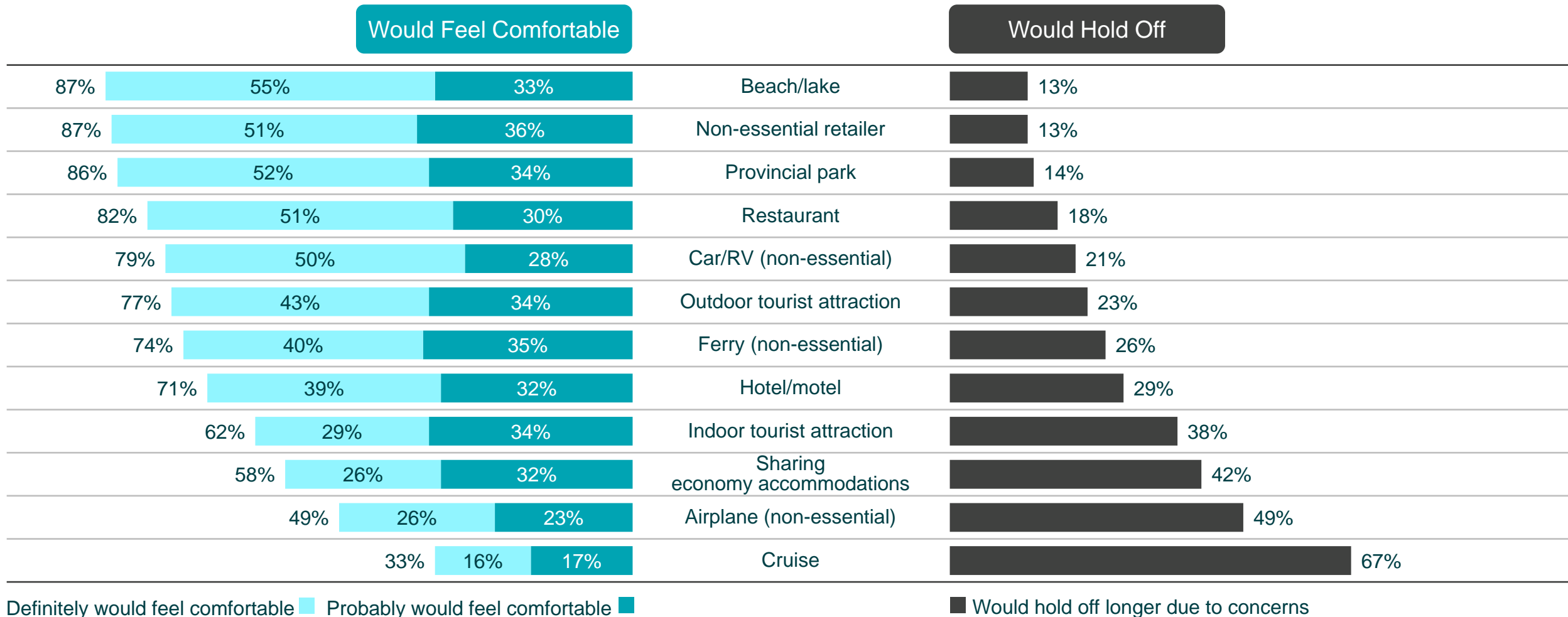


Base: All respondents
D2. Given the current situation with COVID-19, how concerned would you be with the following types of visitors making non-essential trips into your community over the next few weeks?
D2a. And how concerned would you be with the following types of Canadian visitors making non-essential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

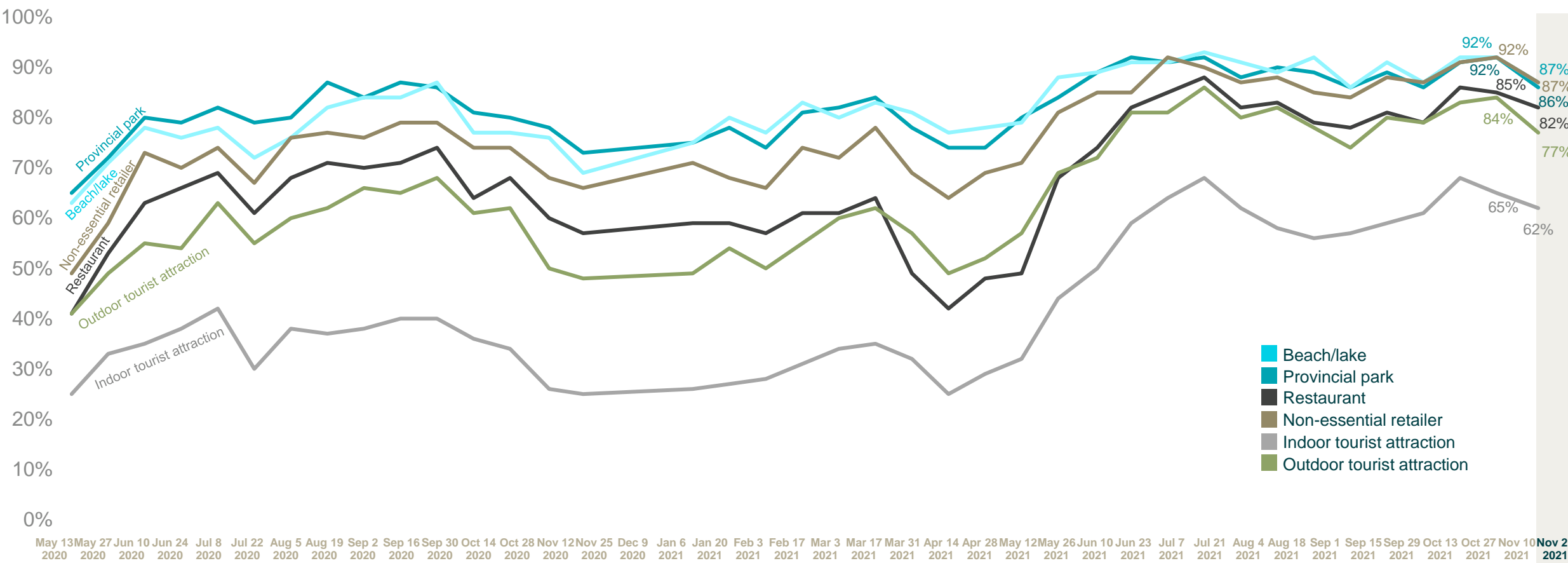
(Wave 40 – Nov 26, 2021)



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

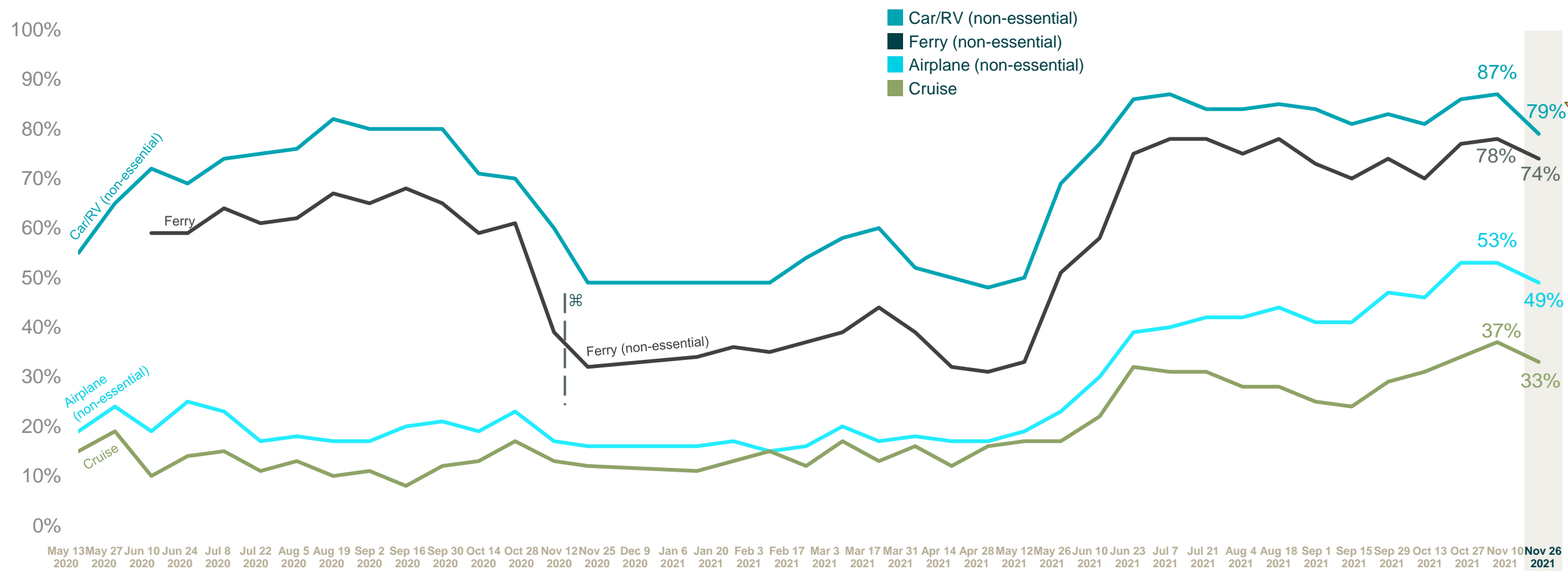
(Total Definitely/Probably Would By Activity)



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

Tracking British Columbians' Comfort Levels With Transportation Modes

(Total Definitely/Probably Would By Transportation)

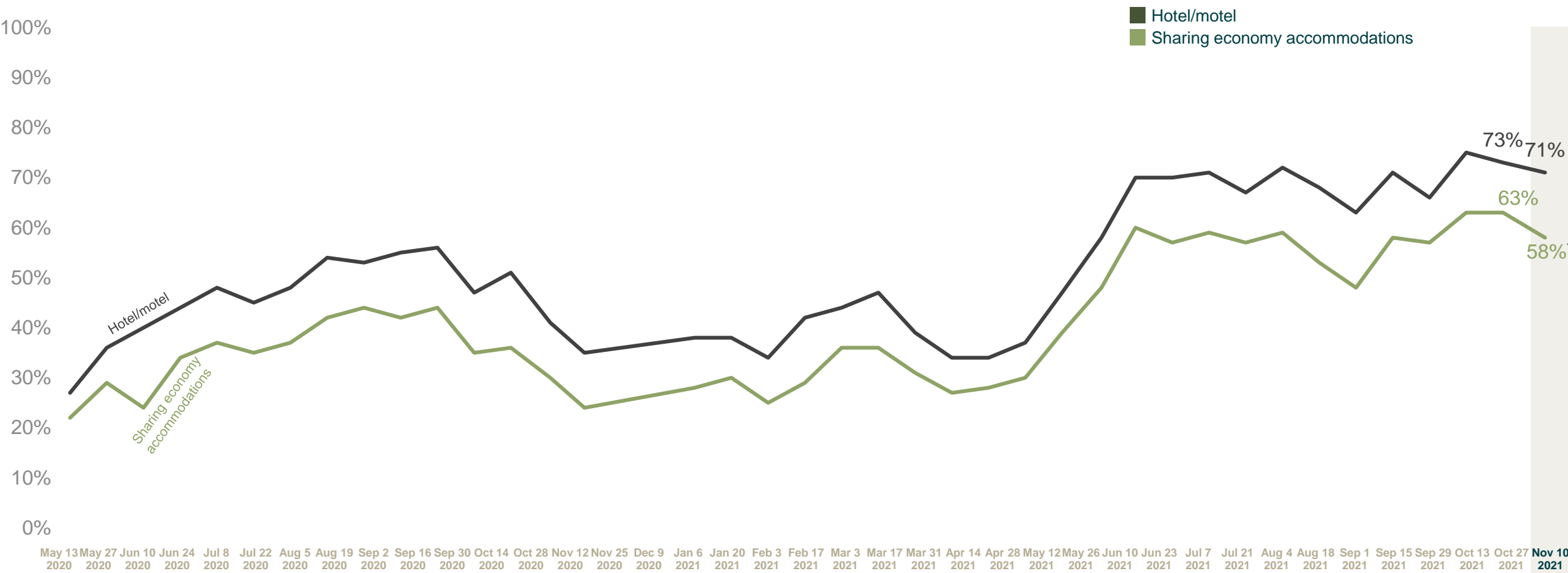


⌘ Changed from "ferry" to "ferry for non-essential travel" November 12, 2020 wave.
Base: All respondents, excluding not applicable/don't do this in general and not applicable/wouldn't do this at this time of year
D1. Would be comfortable doing/using each of the following in the next few weeks, or are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

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

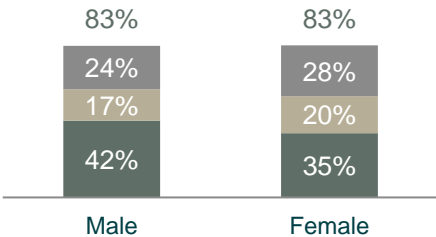
(Wave 40 – Nov 26, 2021)



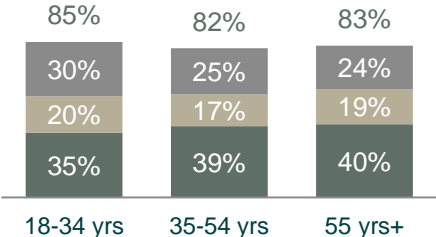
- 4-12 months from now
- 2-3 months from now
- With next 4 weeks

Nearby communities (day trip)

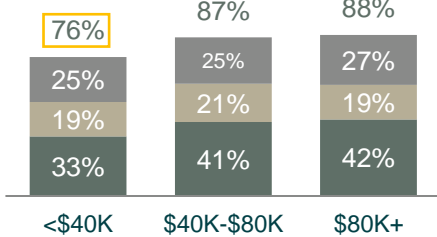
Gender



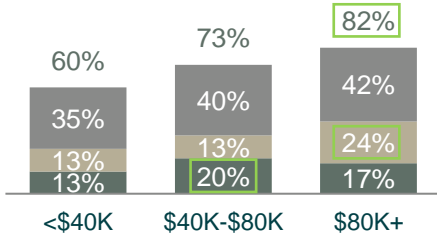
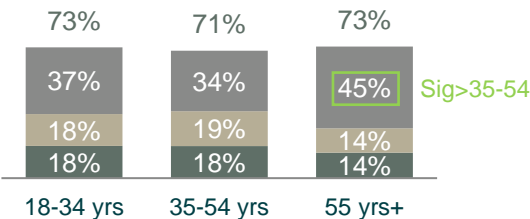
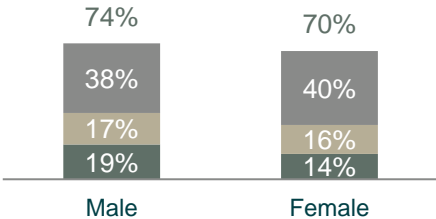
Age



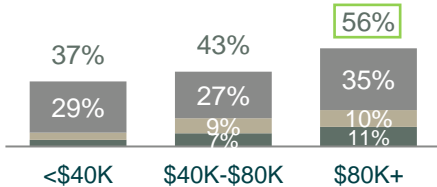
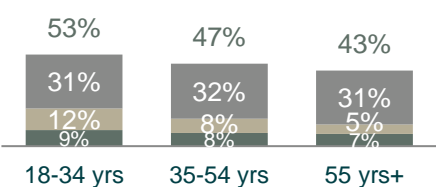
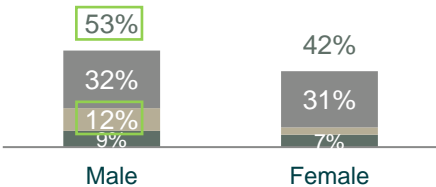
HHI



Elsewhere in BC (overnight)



Other parts of Canada

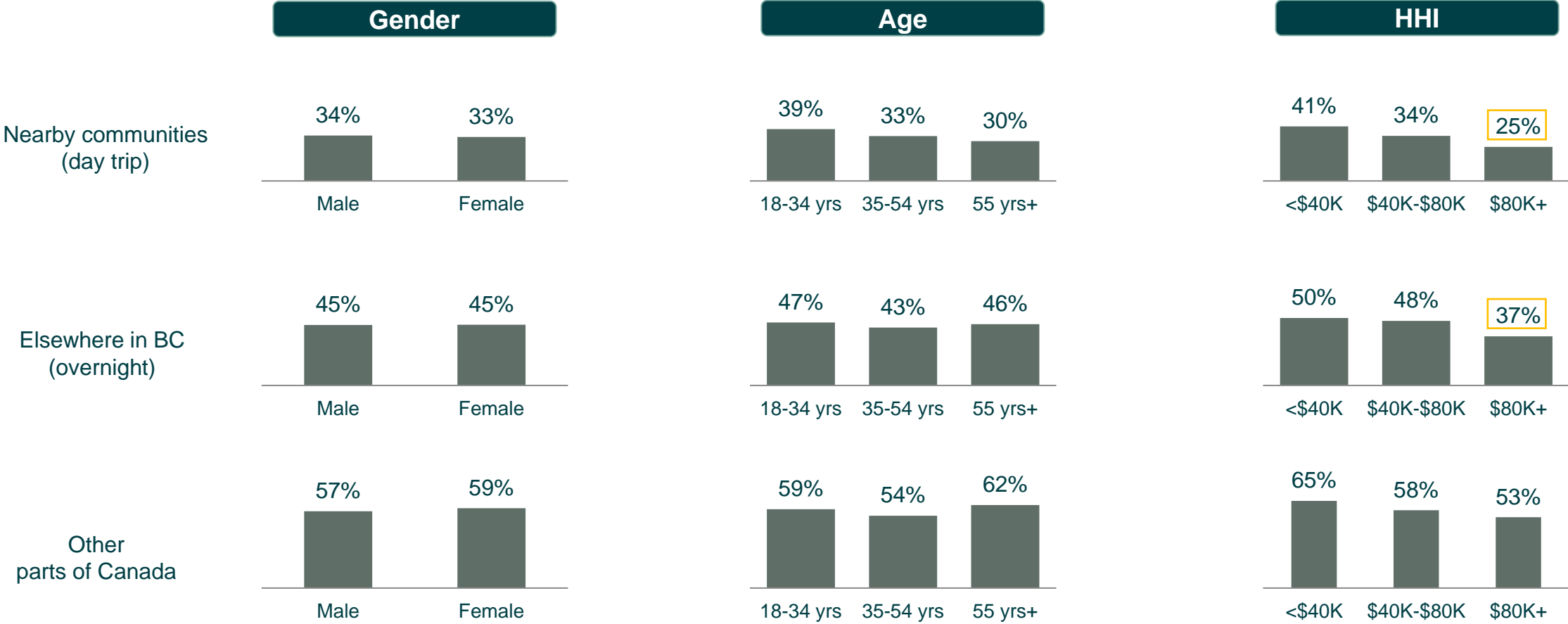


Base: All respondents
D3. When, if at all, are you likely to make trips to the following destinations?
Due to rounding, the total may not equal 100% to the sum of individual values shown.

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 40 – Nov 26, 2021)

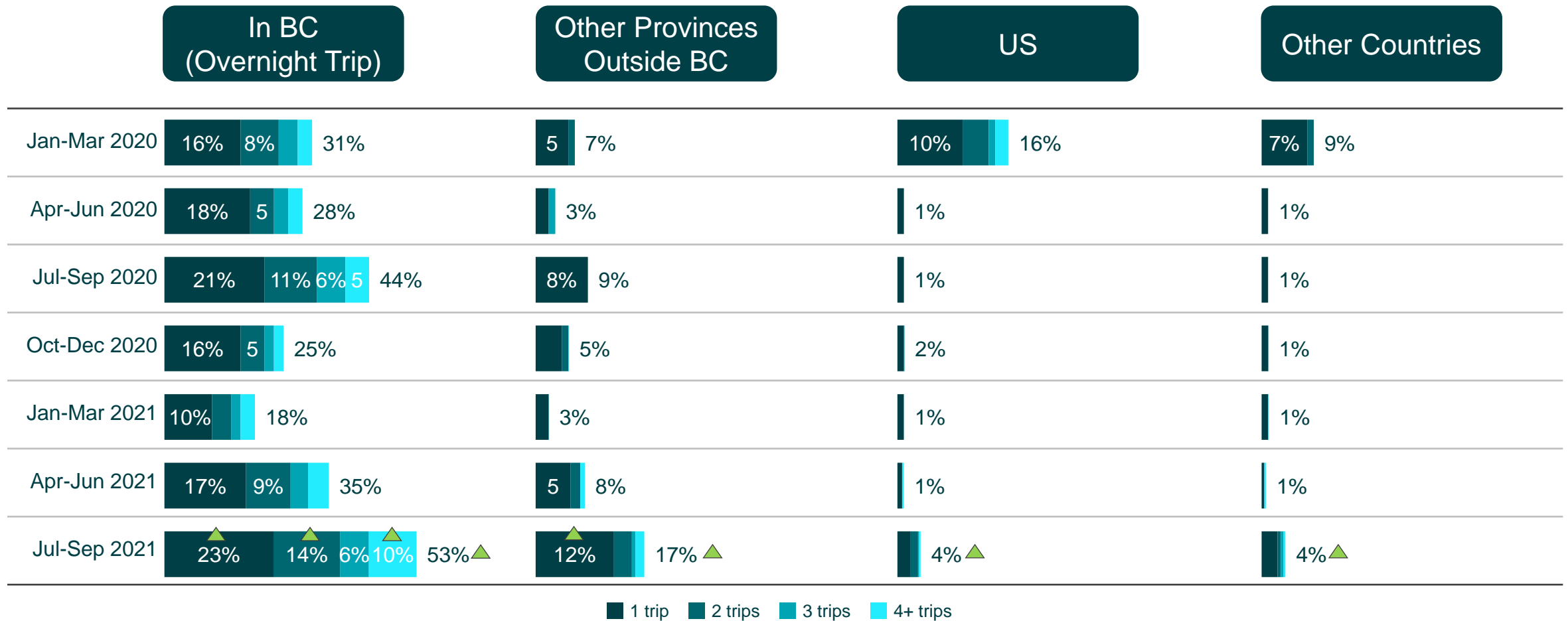


Base: All respondents
D2. Given the current situation with COVID-19, how concerned would you be with the following types of visitors making non-essential trips into your community over the next few weeks?

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

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).

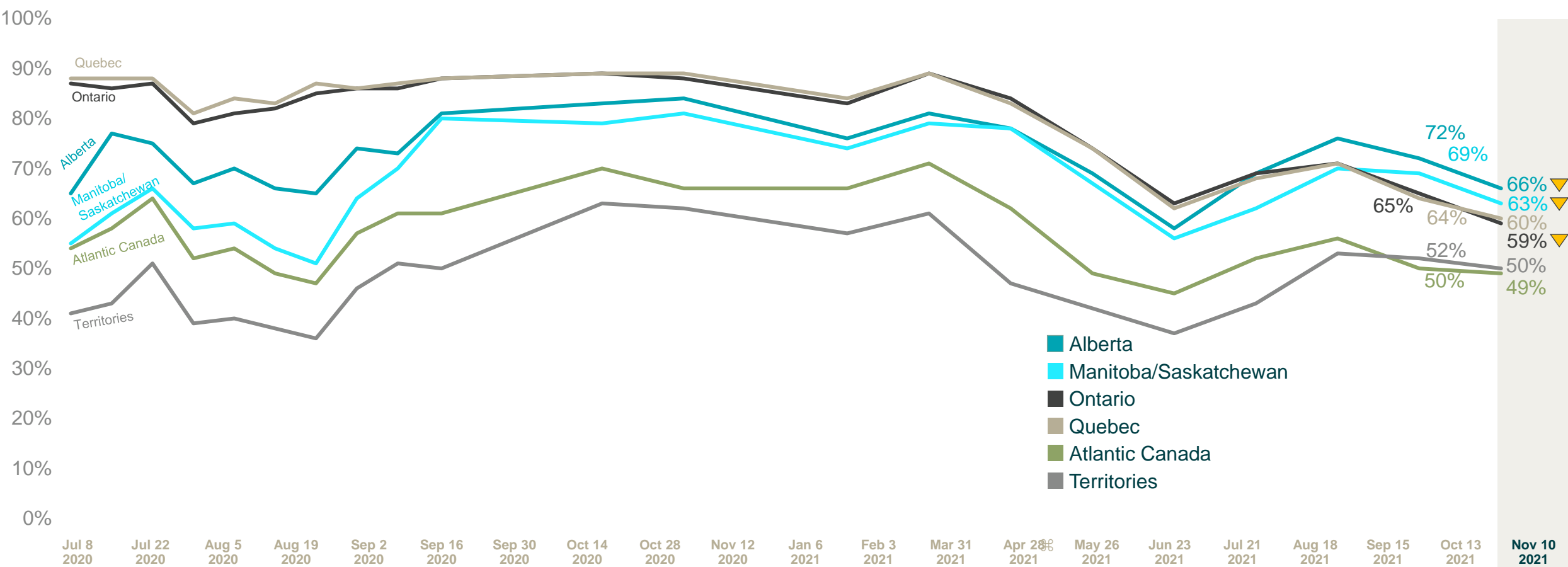
Due to rounding, the sum of the individual values shown may not add up to the total shown.

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

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

Tracking British Columbians' Concern Welcoming Canadian Visitors

(Total Very/Somewhat Concerned By Origin)

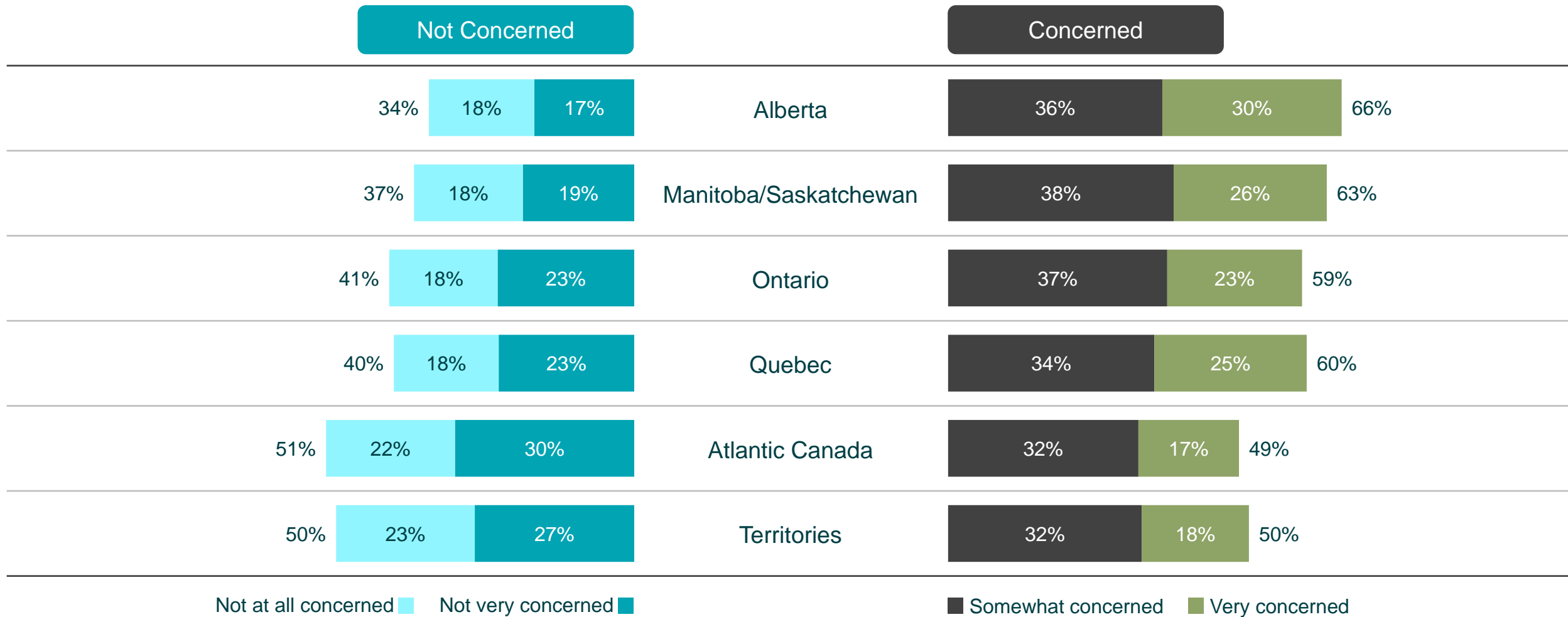


⌘ Question frequency changed from bi-weekly to monthly starting November 12, 2021.
Base: All respondents
D2a. And how concerned would you be with the following types of Canadian visitors making non-essential trips into your community over the next few weeks?

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

Snapshot Of British Columbians' Concern Welcoming Canadian Visitors

(Wave 39 – Nov 10, 2021)

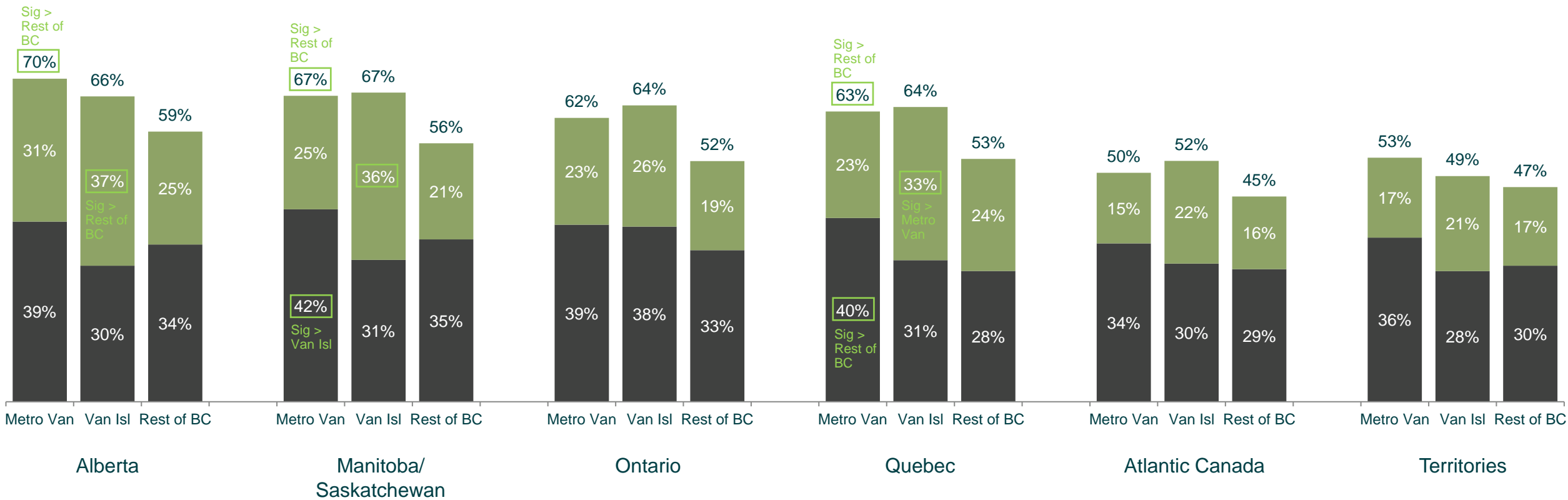


Snapshot Of British Columbians' Concern Welcoming Canadian Visitors By Region

(Wave 39 – Nov 10, 2021)



Very concerned
Somewhat concerned

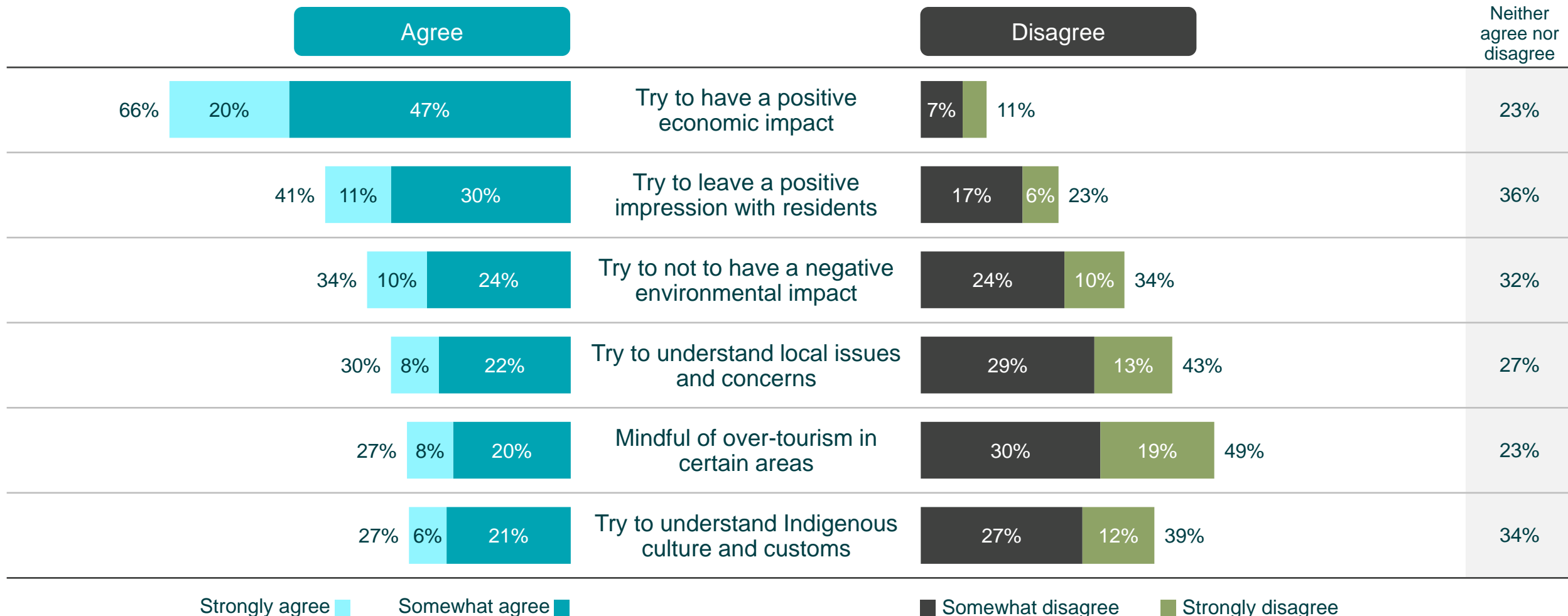


Base: All respondents
D2a. And how concerned would you be with the following types of Canadian visitors making non-essential trips into your community over the next few weeks?
Due to rounding, the sum of the individual values shown may not add up to the total shown.

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

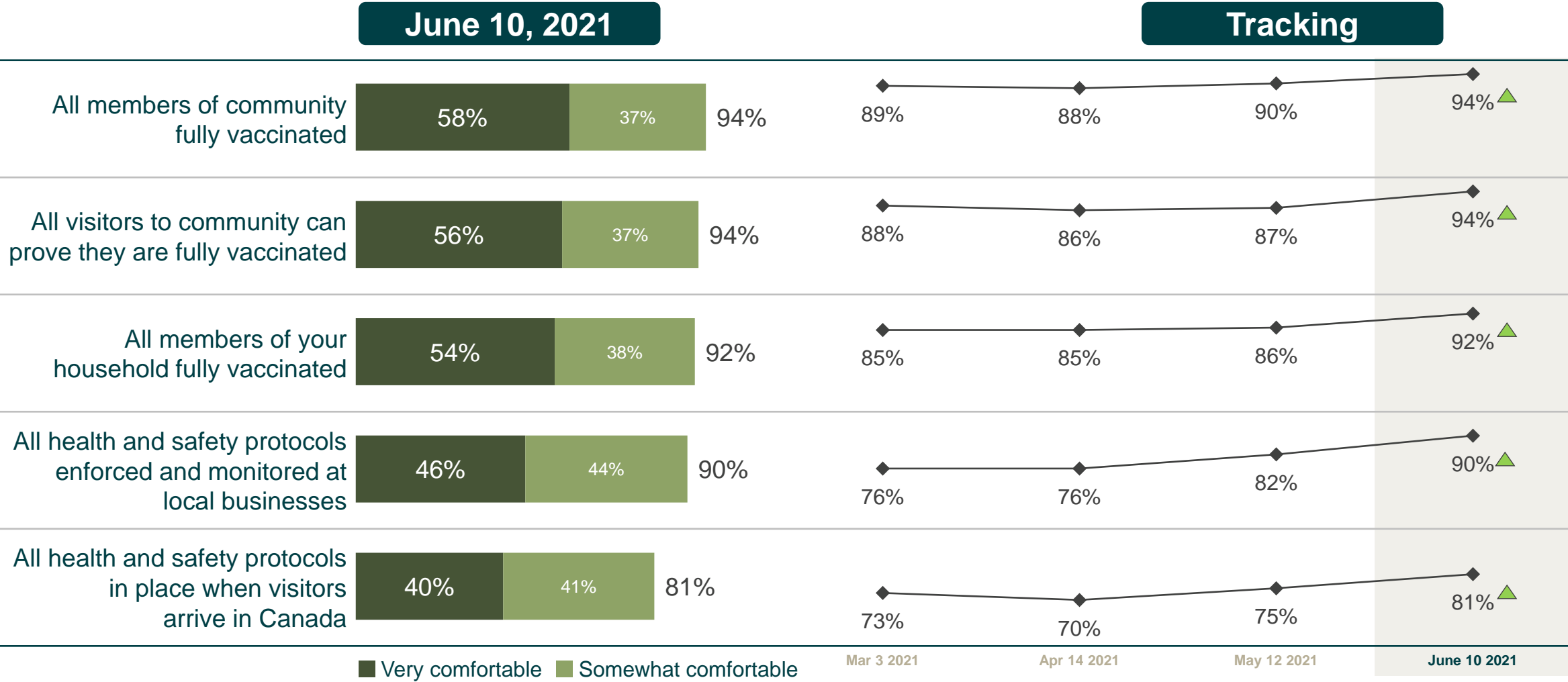
British Columbians' Views On Visitors

(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

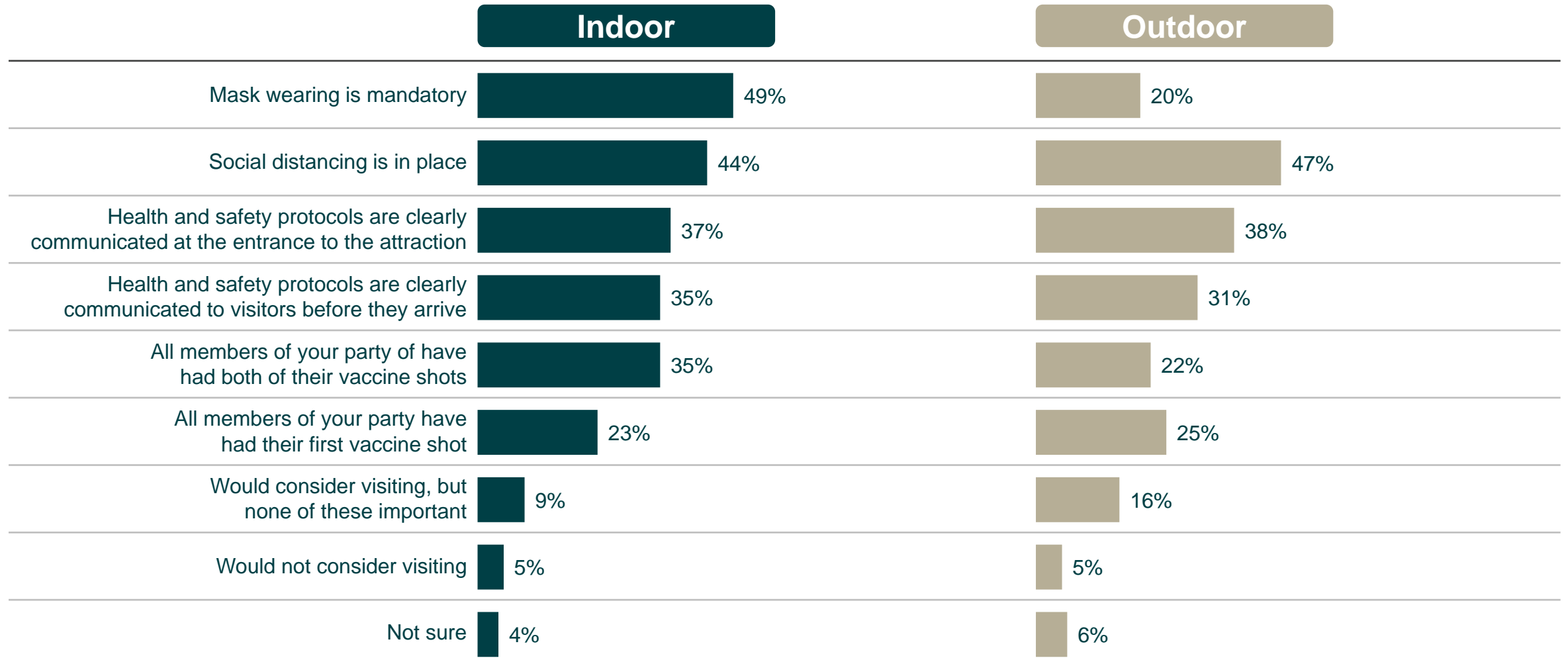


▲ Statistically significantly **higher** than previous wave.

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

Important Circumstances In Visiting BC Attractions (Aided)

(Wave 29 – June 23, 2021)

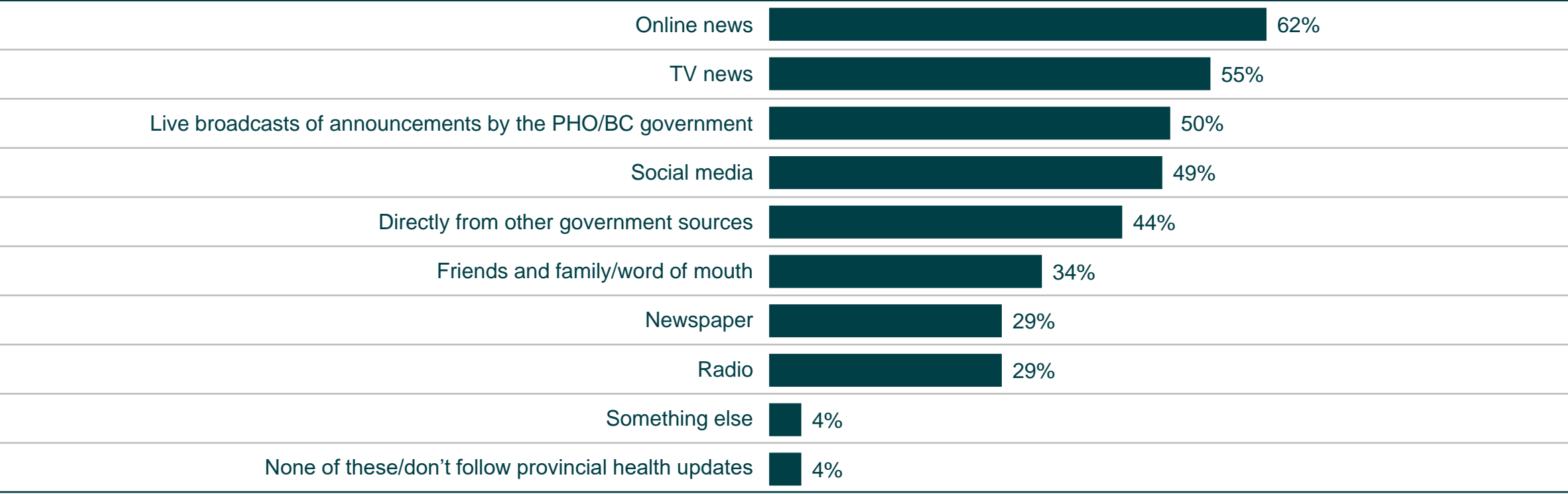


Source Of Provincial COVID-19 Health Updates

(Wave 21 - March 3, 2021)

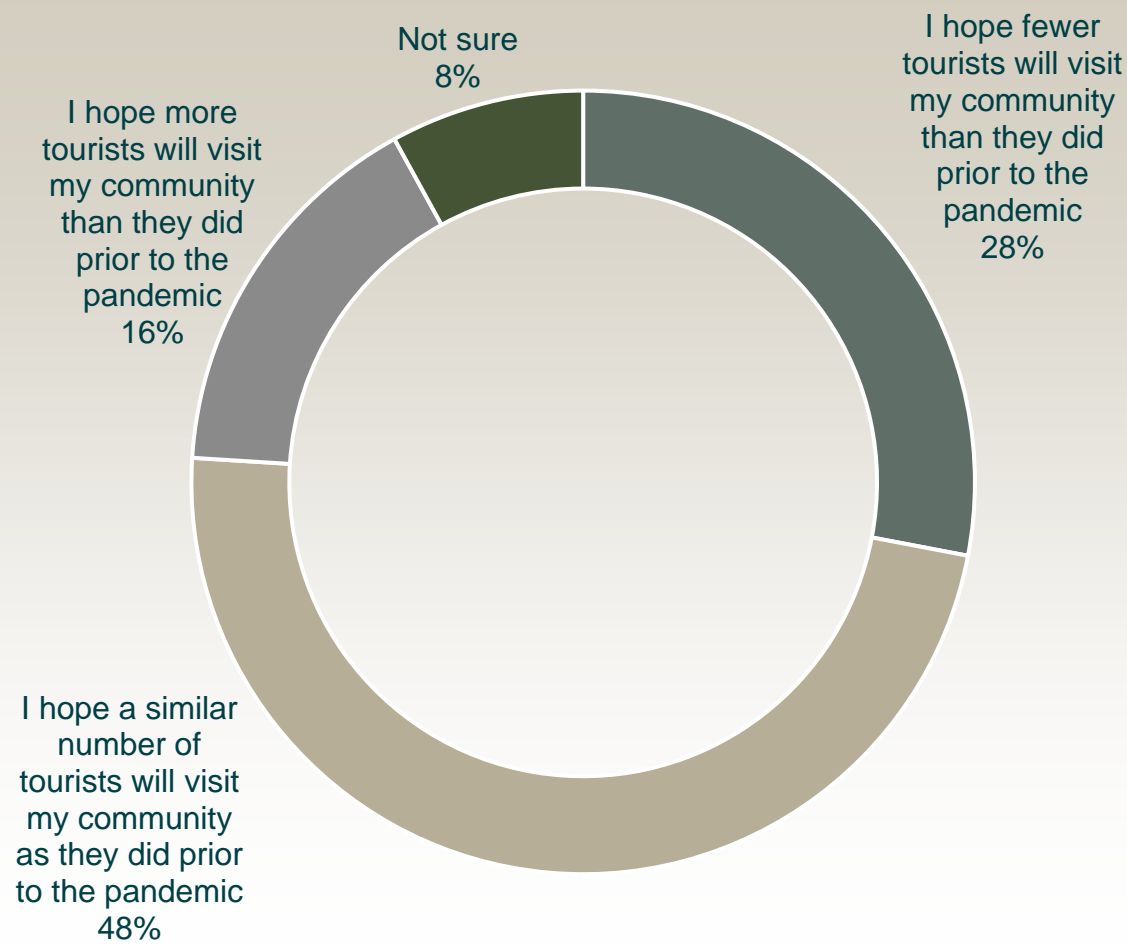


March 3, 2021
(n=827)



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%

23% Statistically significantly **higher** than comparison group(s).
9% Statistically significantly **lower** than comparison group(s).



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