



DESTINATION  
BRITISH COLUMBIA®

# BC Residents' Public Perceptions: COVID-19 Travel and Tourism Wave 23 Report

Report prepared by Insights West  
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# Table of Contents



<b>BACKGROUND AND METHODOLOGY</b>	<b>3</b>
<b>KEY HIGHLIGHTS</b>	<b>4</b>
<b>DETAILED FINDINGS</b>	<b>7</b>
<b>Past Travel</b>	<b>8</b>
<b>Travel Intentions</b>	<b>9</b>
• Tracking Overall	
• By Demographics	
<b>Concern to Welcome Visitors</b>	<b>12</b>
• Tracking Overall	
• By Demographics	
• Measures Which Increase Comfort With Welcoming Visitors	
<b>Comfort in Activities/Modes of Transportation</b>	<b>16</b>
<b>Source of Provincial COVID-19 Health Updates</b>	<b>19</b>

## BACKGROUND



- Destination BC is monitoring British Columbians' 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%



# KEY HIGHLIGHTS – WHAT’S NEW OR CHANGED



## PAST TRAVEL

- This wave we asked about travel for the most recent three-month time period (January through March, 2021), adding to the timeline started in 2020. Results show trips taken are as low, or lower, than at any point in the past, with decreased travel intentions likely caused by rising case numbers and increasing travel restrictions.
  - Overnight trips in BC were taken by only 18% of British Columbians in the past three months, down 7% from the three months previous, and 13% lower than at the same time last year.
  - Trips to other provinces is also at a historical low of 3%, down 2% from the last three months and 4% lower than the same time last year.
  - Trips to the US or other countries remain at nearly zero levels as they have since April 2020.

## TRAVEL INTENTIONS

- Recent events, most notably the Provincial Health Officer’s announcement of increased restrictions on March 29<sup>th</sup>, have also apparently stalled what was an emerging trend in increased travel intentions, with all types of travel intentions remaining at the same levels or declining slightly when compared with the previous wave (March 17<sup>th</sup>, 2021).
- Travel intentions have varied amongst the different demographic groups from wave to wave, which means a consistent pattern of differences has yet to emerge. However, the most consistent difference seen in the study overall persists again in Wave 23 (March 31<sup>st</sup>, 2021), and is income-based:
  - British Columbians from higher income households are more likely to be planning a trip in BC or elsewhere in Canada than lower income households (by 10% to 18% higher in the next 12 months). However, differences are fairly small in the shorter term (i.e., next 4 weeks), which may mean differences are an indicator of longer term ability to afford, instead of shorter term intentions that may be related to greater comfort in travelling during the COVID-19 pandemic.

# KEY HIGHLIGHTS – WHAT’S NEW OR CHANGED

*(continued)*



## CONCERN TO WELCOME VISITORS

- Continuing the general theme of greater concern about COVID-19, the trend in British Columbians’ concerns about visitors to their community have also reversed in Wave 23 (March 31<sup>st</sup>, 2021).
  - Last wave, Wave 22 (March 17<sup>th</sup>, 2021) marked a downward trend in concern regarding local BC visitors (day trip or overnight), presumably in response to the increase in vaccines. But this wave, concern levels have come back up to the levels seen in October through December 2020, presumably marking the impact of recent rising case numbers.
  - Concern with visitors from outside the province are less changed this wave, having remained high over many waves.
  - As is consistently reported, women are more often concerned about all Canadian visitors and this wave the gaps in results compared with men are particularly large (concern levels are between 14% and 17% higher). Also consistent with past results, Vancouver Island residents remain slightly more concerned about visitors than those from other areas.
- Concern about visitors from various provinces in Canada is an alternating question and was asked this wave, after having previously been asked in Wave 20 (February 3<sup>rd</sup>, 2021).
  - Despite still being high (especially for ON, QU, MB/SK and AB), concern levels for visitors from all provinces and territories are slightly lower than in Wave 20 (February 3<sup>rd</sup>, 2021).

# KEY HIGHLIGHTS – WHAT’S NEW OR CHANGED

*(continued)*

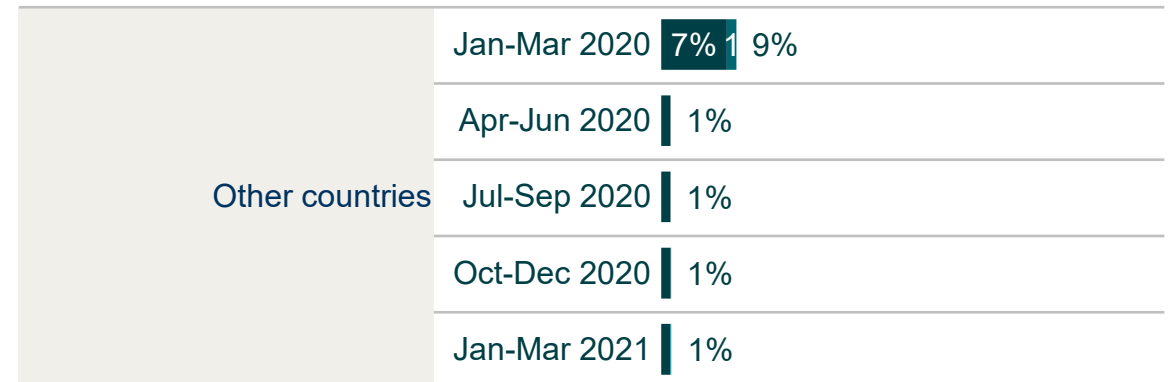
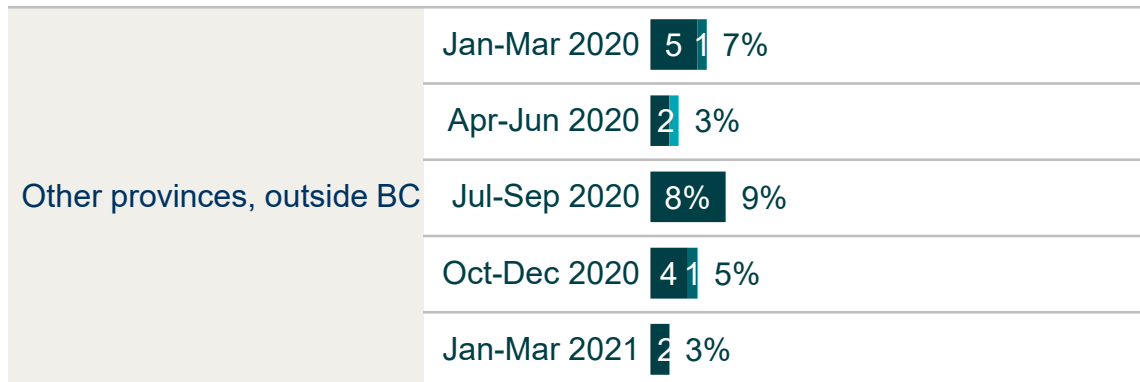
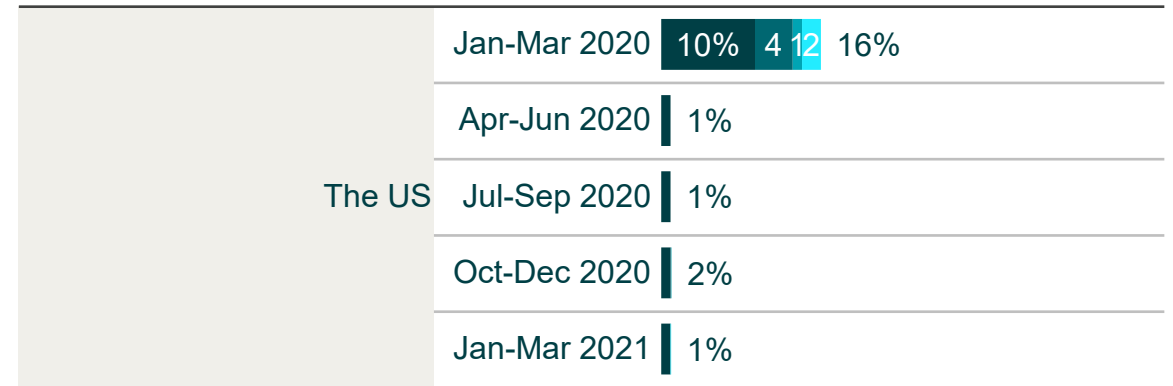
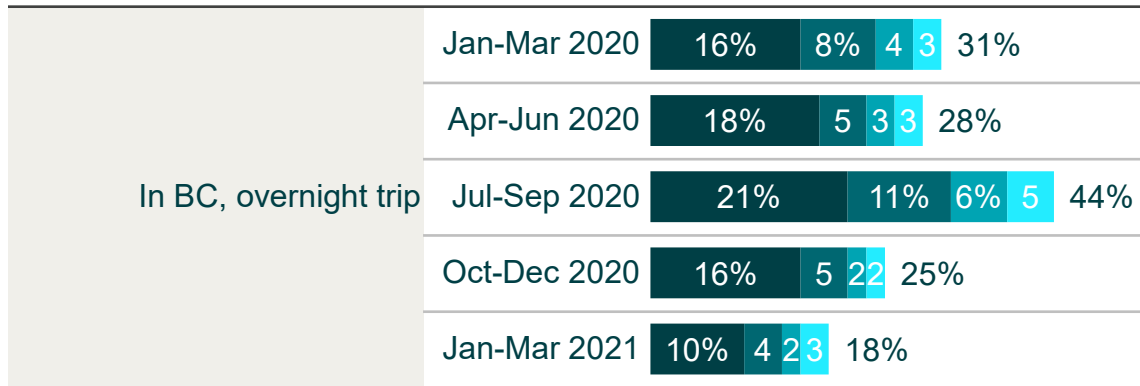


## COMFORT WITH ACTIVITIES/MODES OF TRANSPORTATION

- Over the past three waves, comfort with participating in activities and modes of transportation had been slowly but surely trending upward, indicating that British Columbians were beginning to see improvements in the COVID-19 situation and expressing optimism and comfort in taking part in more usual pursuits. The recent rise in COVID-19 case numbers, however, appears to have had an impact and has reversed the trend.
- Most comfort levels have gone back down in Wave 23 (March 31<sup>st</sup>, 2021), especially those that had been increasing the most and/or were of fairly wide-spread comfort (those that only a few are comfortable doing, such as a cruise or non-essential air travel, continue at those same low levels over time).
- Specifically worth noting:
  - Dining in a restaurant is down 15% from last wave, with 49% feeling comfortable this wave; this is the lowest point to date except for the first metric in May 2020 – this obviously aligns with the recent closure of restaurants by the Provincial Health Officer (PHO).
  - Shopping at non-essential retailers decreased 9% from last wave, with 69% feeling comfortable this wave - similar to low levels seen in later 2020.
  - Staying a hotel or motel is down 8% this wave, with 39% feeling comfortable - similar to levels seen in November 2020 through January 2021.
  - Non-essential travel by car/RV in BC is also down 8% this wave, with 52% feeling comfortable - also similar to levels in November 2020 though January 2021.
  - Visiting a provincial park is down by 6% this wave, with 78% feeling comfortable - similar to levels during the fall of 2020.

# DETAILED 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 total may not equate 100% to the sum of individual values shown.

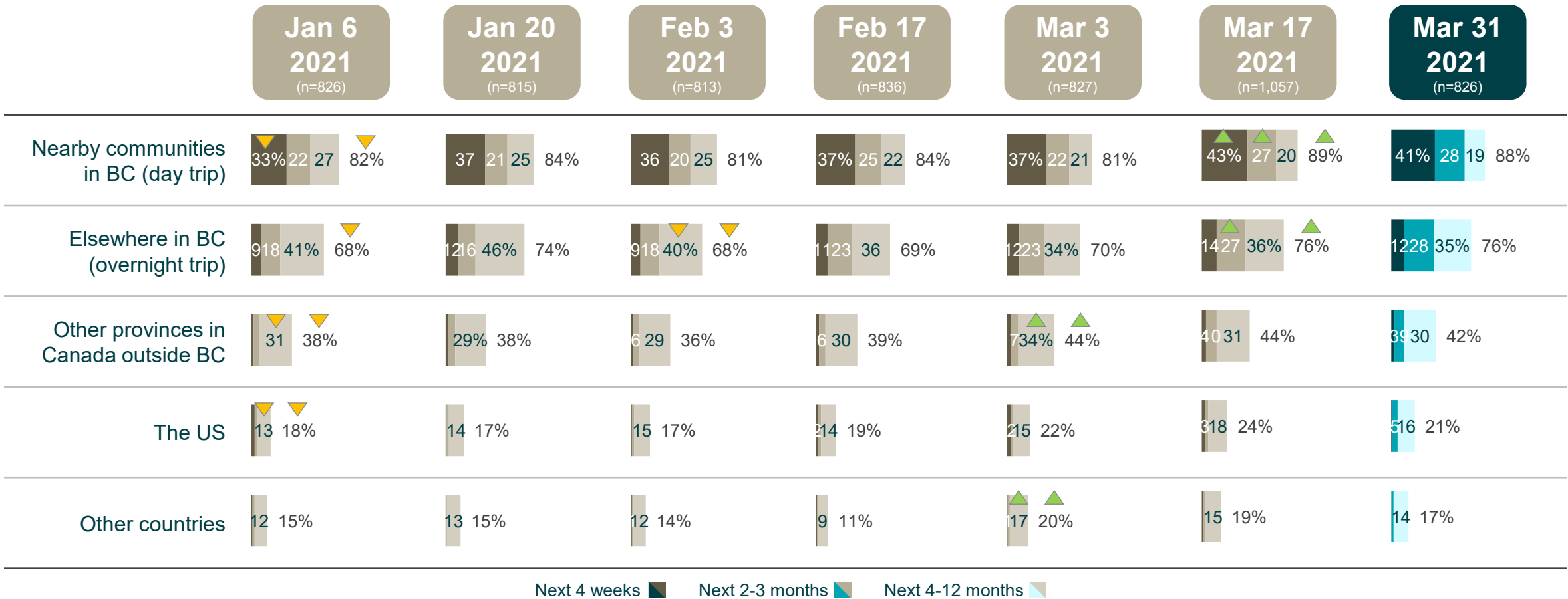
▲ Statistically significantly **higher** than previous wave.

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



# Travel Intentions

(Next 12 Months)



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 equate 100% to the sum of individual values shown.

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

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

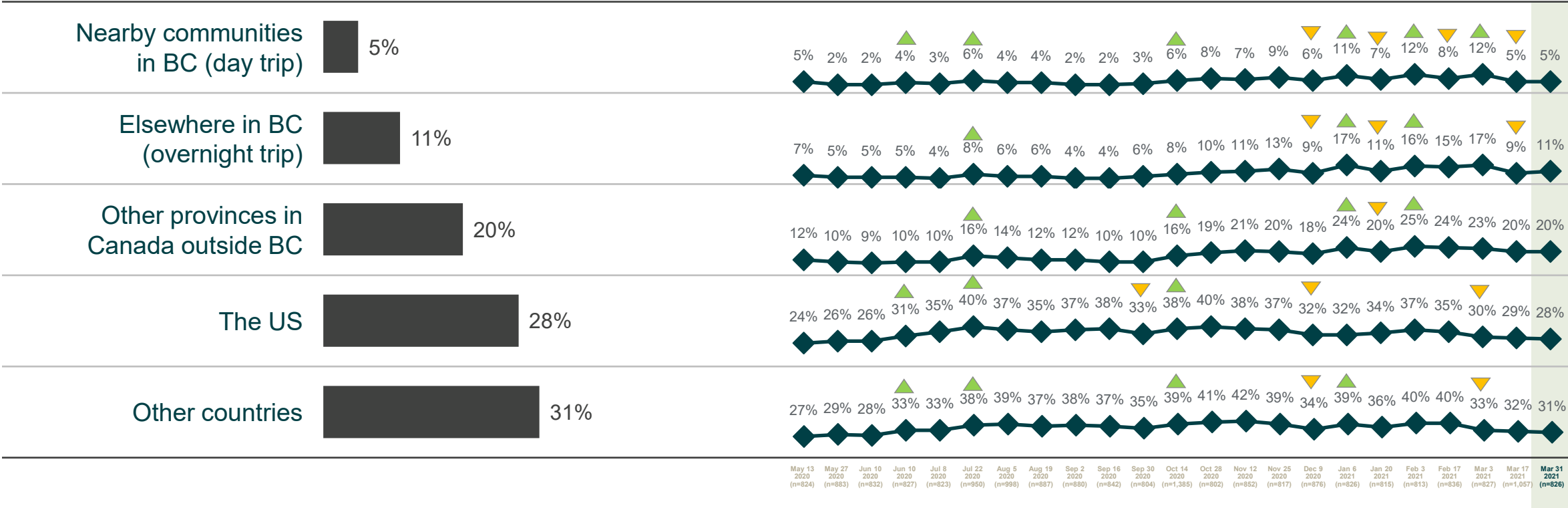
# Travel Intentions

(Only if Vaccine/Treatment)



**March 31, 2021**

**Tracking**



Base: All respondents

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

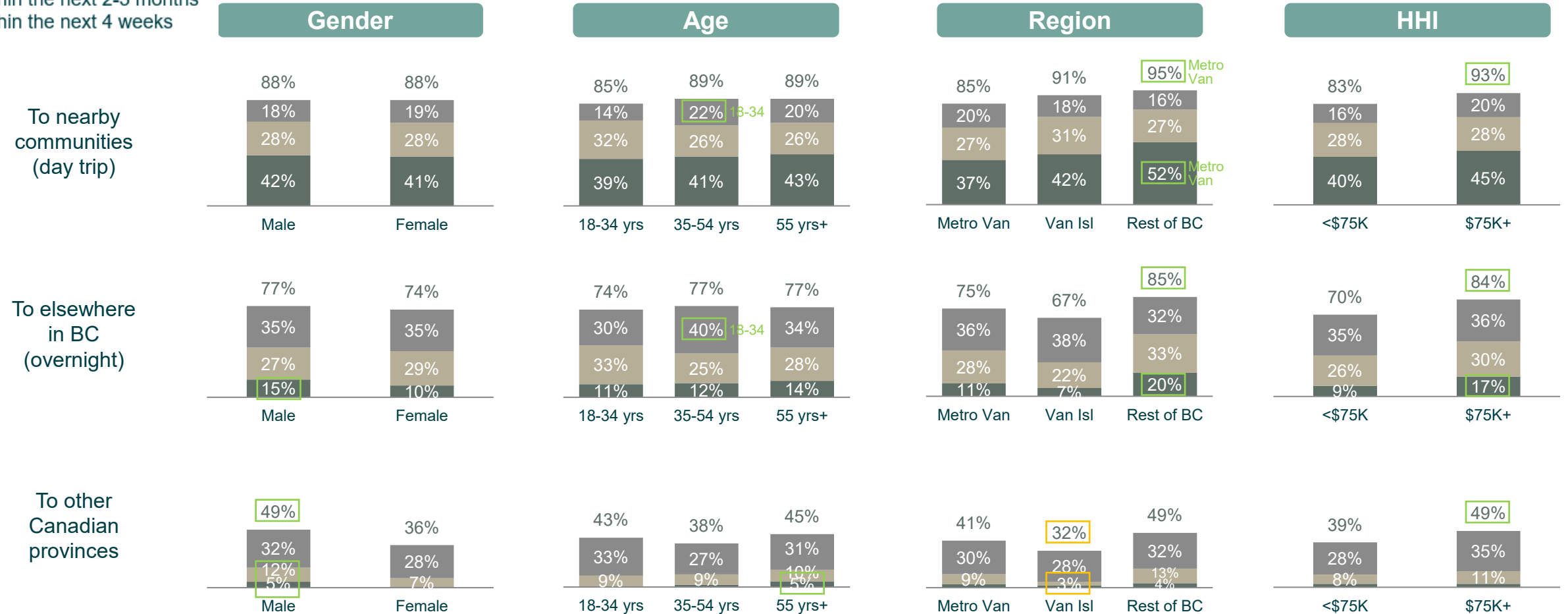
▲ Statistically significantly **higher** than previous wave.  
▼ Statistically significantly **lower** than previous wave.

# Travel Intentions by Demographics

(Next 12 Months: Wave 23: March 31, 2021)



- Within the next 4-12 months
- Within the next 2-3 months
- Within the 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 equate 100% to the sum of individual values shown.

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

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

# Concern to Welcome Visitors



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?

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

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

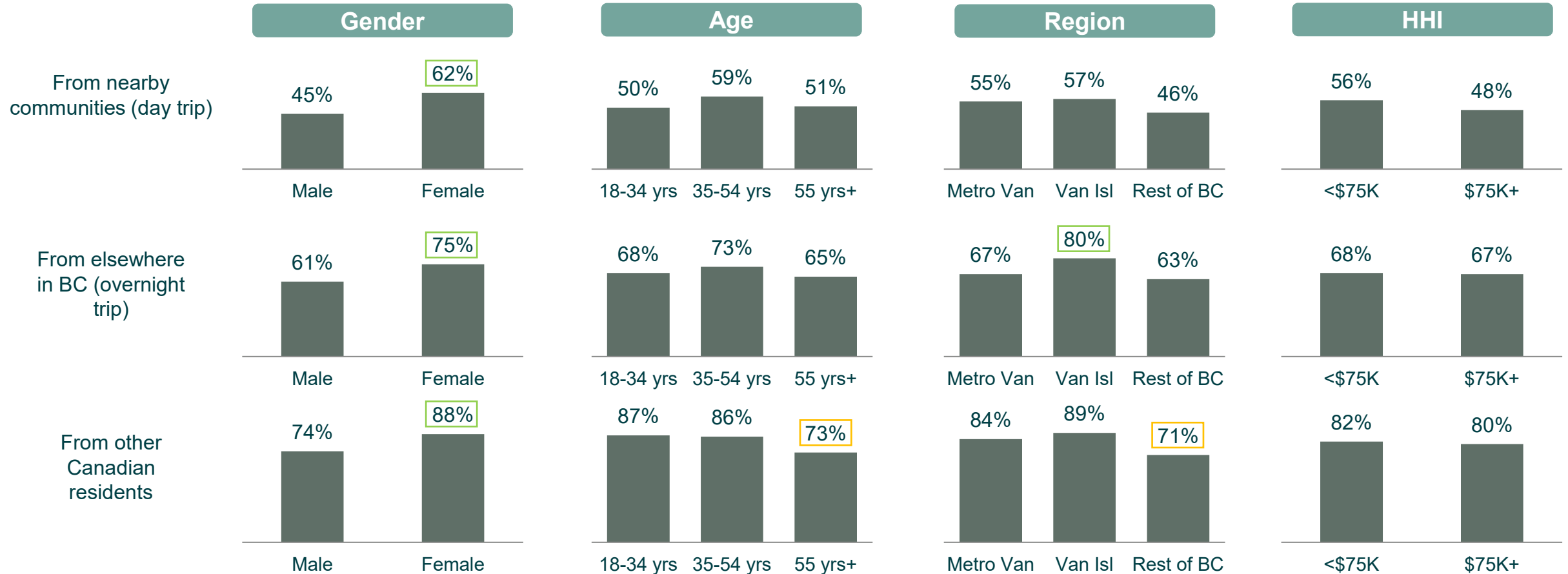
▼ Statistically significantly **lower** than previous wave.

# Concern to Welcome Visitors by Demographics

(Wave 23 – March 31, 2021)



■ Total concerned



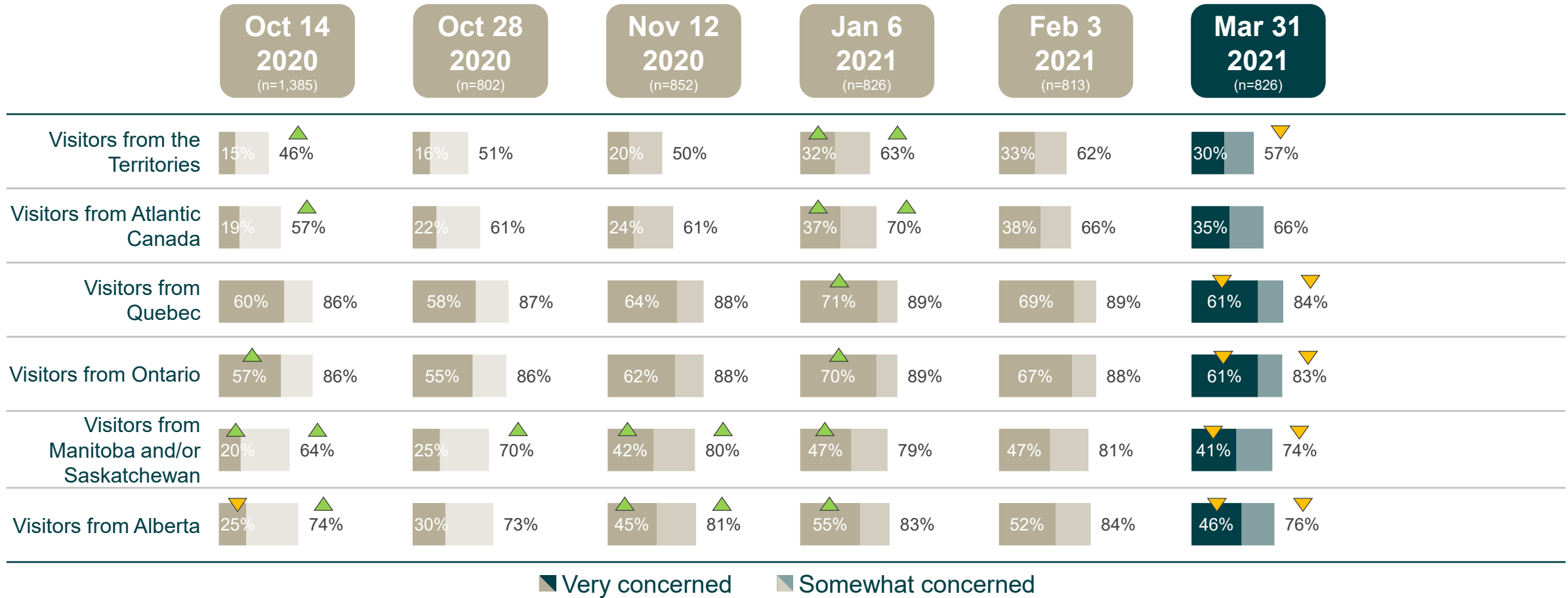
Base: All respondents

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?

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

# Concern to Welcome Canadian Visitors

(continued)



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 total may not equate 100% to the sum of individual values shown.

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

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

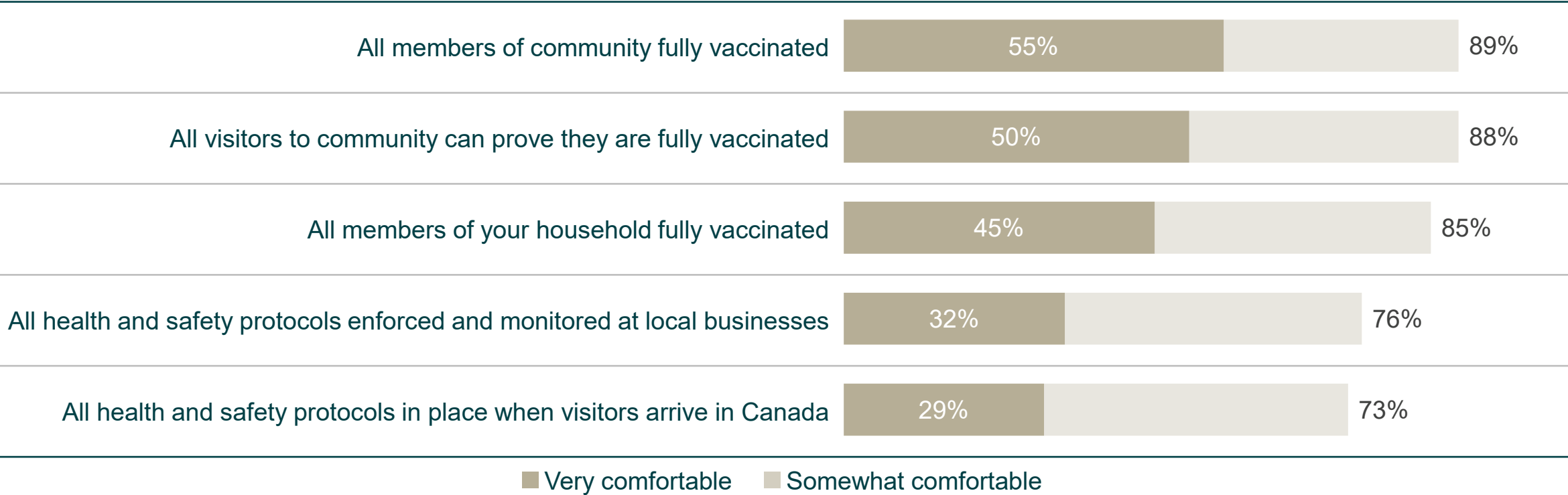


# Comfort With Welcoming Visitors Under Various Circumstances

(Wave 21: March 3, 2021)



Mar 3  
2021  
(n=827)



Base: All respondents

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

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

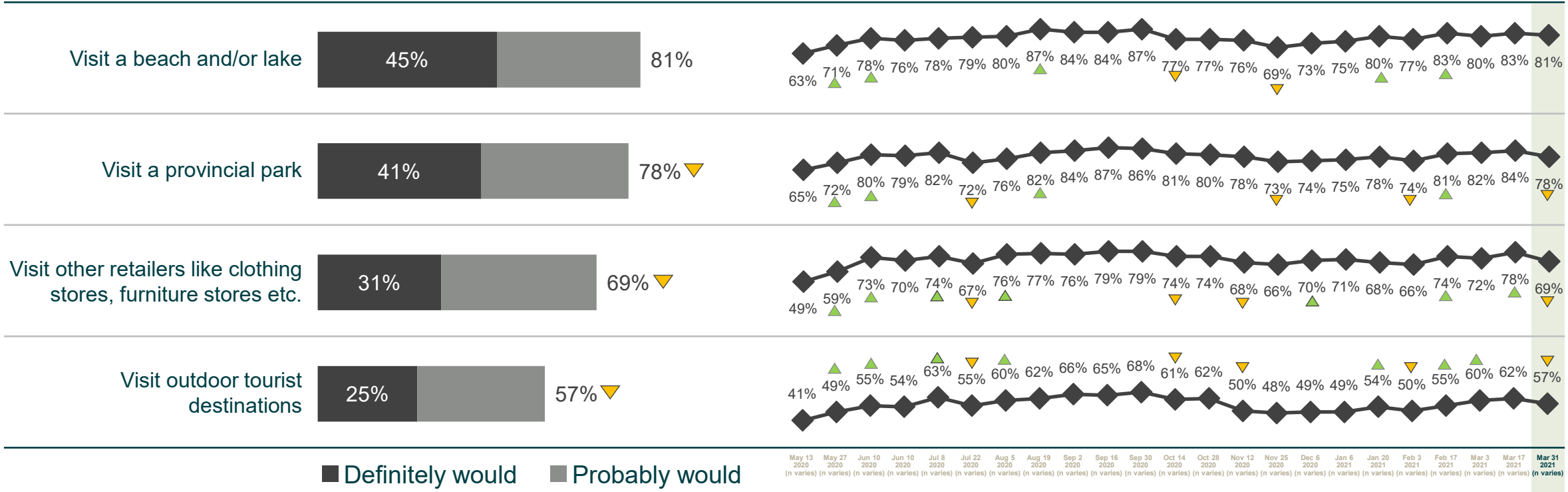
# Comfort With Activities/Modes of Transportation <sup>⌘</sup>

(Among Those Who Do Each)



**March 31, 2021**

**Tracking**  
(Total Would)



⌘ Question wording change starting November 12: new response category “not applicable/wouldn’t do this at this time of year” added.  
 Base: All respondents, excluding not applicable/don’t do this in general and starting November 12 also excluding not applicable/wouldn’t do this at this time of year.  
 D1. Would you 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.

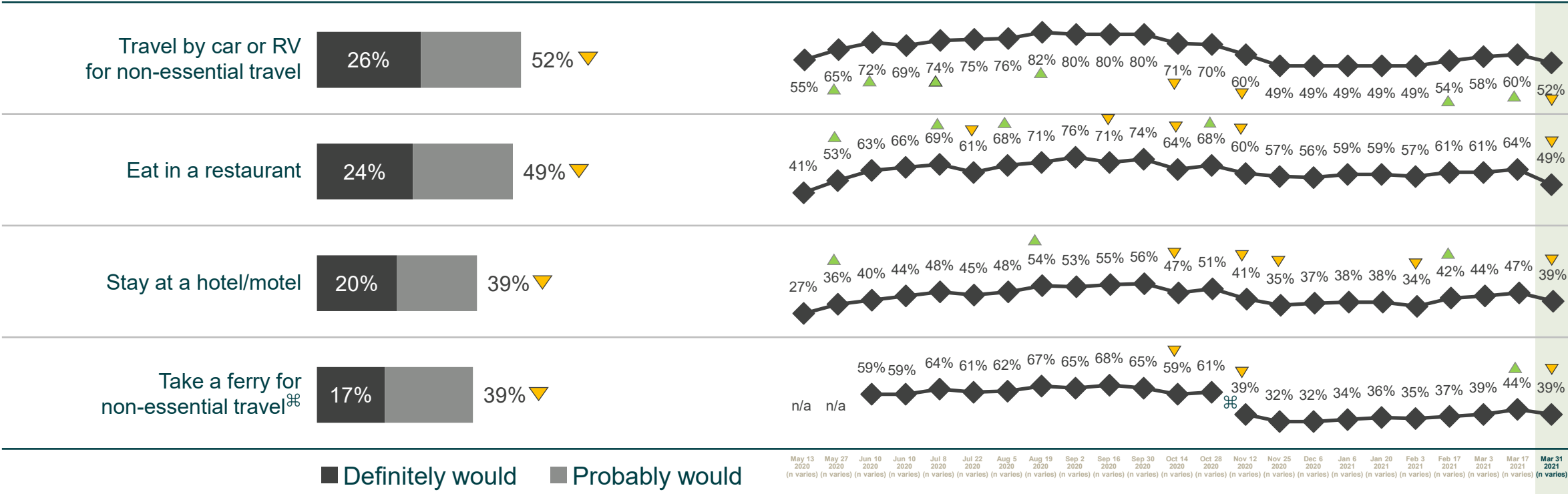
# Comfort With Activities/Modes of Transportation

(Among Those Who Do Each, continued)



**March 31, 2021**

**Tracking**  
(Total Would)



⌘ Question wording change starting November 12: new response category “not applicable/wouldn’t do this at this time of year” and “non-essential travel” added to “Take a ferry”.  
 Base: All respondents, excluding not applicable/don’t do this in general and starting November 12 also excluding not applicable/wouldn’t do this at this time of year.  
 D1. Would you 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.

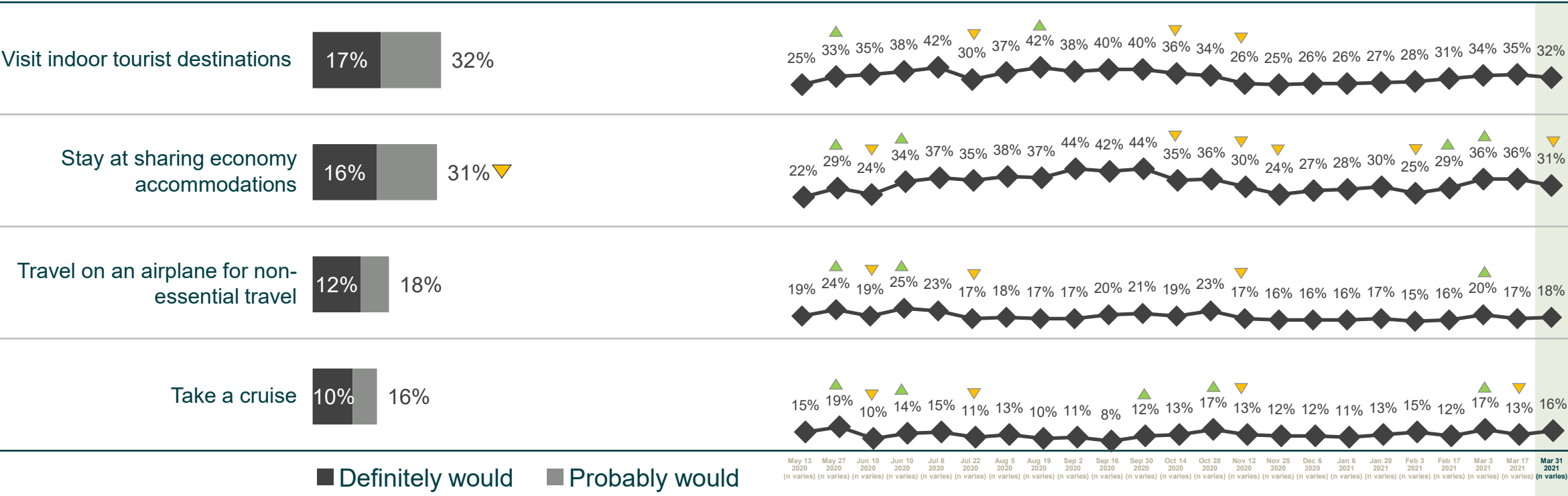
# Comfort With Activities/Modes of Transportation

(Among Those Who Do Each, continued)



**March 31, 2021**

**Tracking**  
(Total Would)



⌘ Question wording change starting November 12: new response category “not applicable/wouldn’t do this at this time of year” added.  
 Base: All respondents, excluding not applicable/don’t do this in general  
 D1. Would you 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?

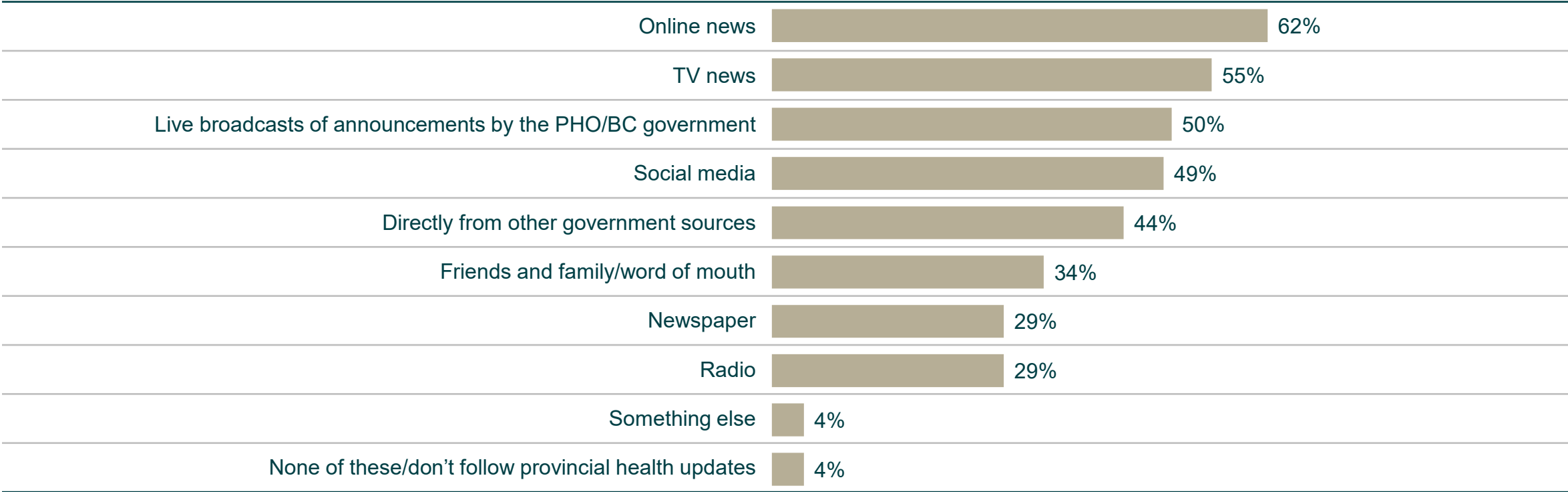
▲ Statistically significantly **higher** than previous wave.  
 ▼ Statistically significantly **lower** than previous wave.

# Source of Provincial COVID-19 Health Updates

(Wave 21: March 3, 2021)



Mar 3  
2021  
(n=827)



Base: All respondents

D6. Which of the following information sources do you use on a weekly basis or more often to learn about Provincial health updates regarding COVID-19?

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



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