



DESTINATION  
BRITISH COLUMBIA<sup>®</sup>

BC Residents' Public Perceptions:  
COVID-19 Travel and Tourism  
Wave 51: October 19, 2022

Report prepared by: Leger

Carmanah Walbran Provincial Park, Vancouver Island

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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. The survey moved to monthly fielding starting in January 2022.
- 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%
41	Dec 17-19, 2021	1,001	+/-3.1%
42	Jan 7-9, 2022	999	+/-3.1%
43	Feb 4-6, 2022	1,003	+/-3.1%
44	Mar 4-6, 2022	1,000	+/-3.1%
45	Apr 8-10, 2022	1,003	+/-3.1%
46	May 6-8, 2022	1,003	+/-3.1%
47	Jun 10-12, 2022	1,002	+/-3.1%
48	Jul 15-17, 2022	1,003	+/-3.1%
49	Aug 5-7, 2022	1,001	+/-3.1%
50	Sept 2-4, 2022	1,001	+/-3.1%
<b>51</b>	<b>Oct 14-16, 2022</b>	<b>1,004</b>	<b>+/-3.1%</b>

# KEY HIGHLIGHTS – WHAT’S NEW OR CHANGED



## PAST TRAVEL (SLIDES 6-7)

- Reported travel over the summer months of July-September 2022, increased compared to the previous quarter, likely due to seasonality, with the exception of travel to other countries. Compared to the same time last year, travel within BC decreased (down -7 points to 46%), whereas travel to other provinces and the US increased (up +2 points to 19%, and +13 points to 17%, respectively).

## TRAVEL INTENTIONS (SLIDES 6-10)

- BC residents' short term (next 4 weeks) travel intentions within BC decreased from September for both day trips (down -5 points) and overnight travel (down -4 points) from September. The same can be said for medium term (within 2-3 months) travel intent, decreasing by -6 points for overnight trips and -8 points for day trips. Travel intentions within BC for both day trips and overnight range from -3 points to -6 points lower compared to October 2021, for short and medium term, respectively.
- Short term intentions for travel to other provinces decreased -2 points from last month and remained stable for medium term. Travel intentions to other parts of Canada over the next 4 weeks remain the same compared to last year, while intentions to travel within the next 2-3 months increased (up +5 points).
- Intent to travel to the U.S. is relatively stable in both the short and medium term and continues to be significantly higher than a year ago. Travel intentions to destinations in other countries decreased over the next 4 weeks (down -2 points) and the next 2-3 months (down -3 points) from September. Short and medium term travel intent to other countries is the same as October 2021.

## CONCERN WELCOMING VISITORS (SLIDES 11-13)

- British Columbians' concern welcoming visitors from most markets remains at record lows. Concern welcoming US travellers decreased -2 points from last month, whereas concern welcoming those from nearby communities increased +2 points.

# KEY HIGHLIGHTS – WHAT'S NEW OR CHANGED

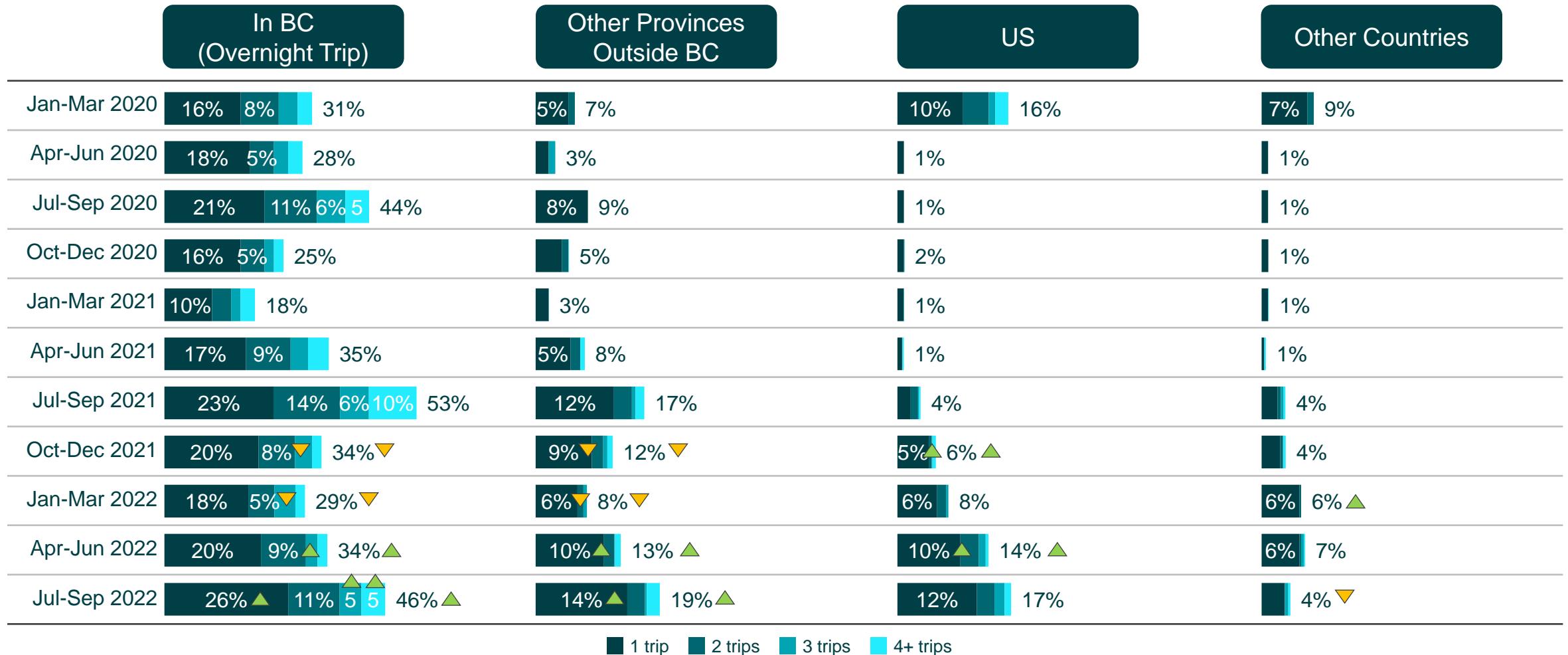


## **COMFORT WITH ACTIVITIES/MODES OF TRANSPORTATION (SLIDES 14-18)**

- Comfort with various activities, transportation types, and accommodation options are mostly stable. After a large increase in September, BC residents' comfort with taking cruise ships decreased -5 points in October.
- Comfort levels with all activities remain close to record high levels.

# PAST TRAVEL

# 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/Jul 7, 2021; Jul-Sep 2021 asked in Wave 37/Oct 13, 2021; Oct-Dec 2021 asked in Wave 42/Jan 7, 2022; Jan-Mar 2022 asked in Wave 45/Apr 8, 2022; Apr-Jun 2022 asked in Wave 48/Jul 15, 2022; Jul-Sep 2022 asked in Wave 51/Oct 14, 2022. 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.

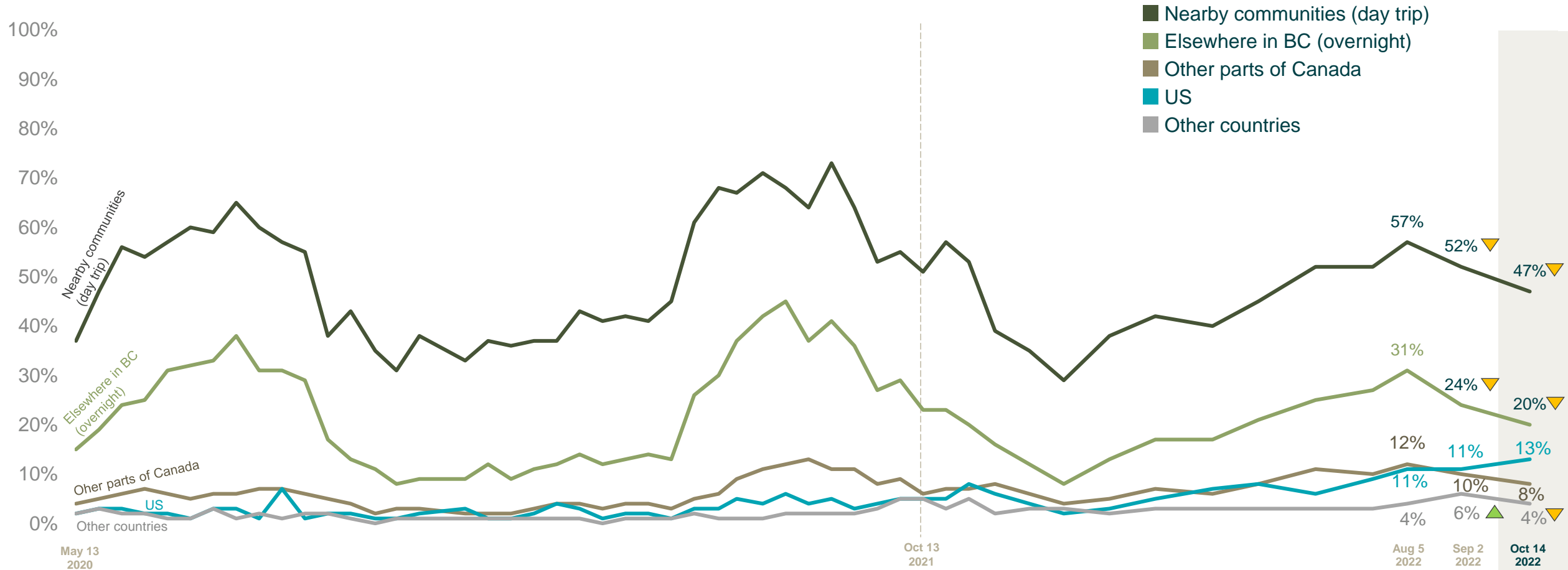
▲ Statistically significantly **higher** than previous wave.  
▼ Statistically significantly **lower** than previous wave.

# TRAVEL INTENT



# Tracking British Columbians' Travel Intent Within Next 4 Weeks

(By Destination)

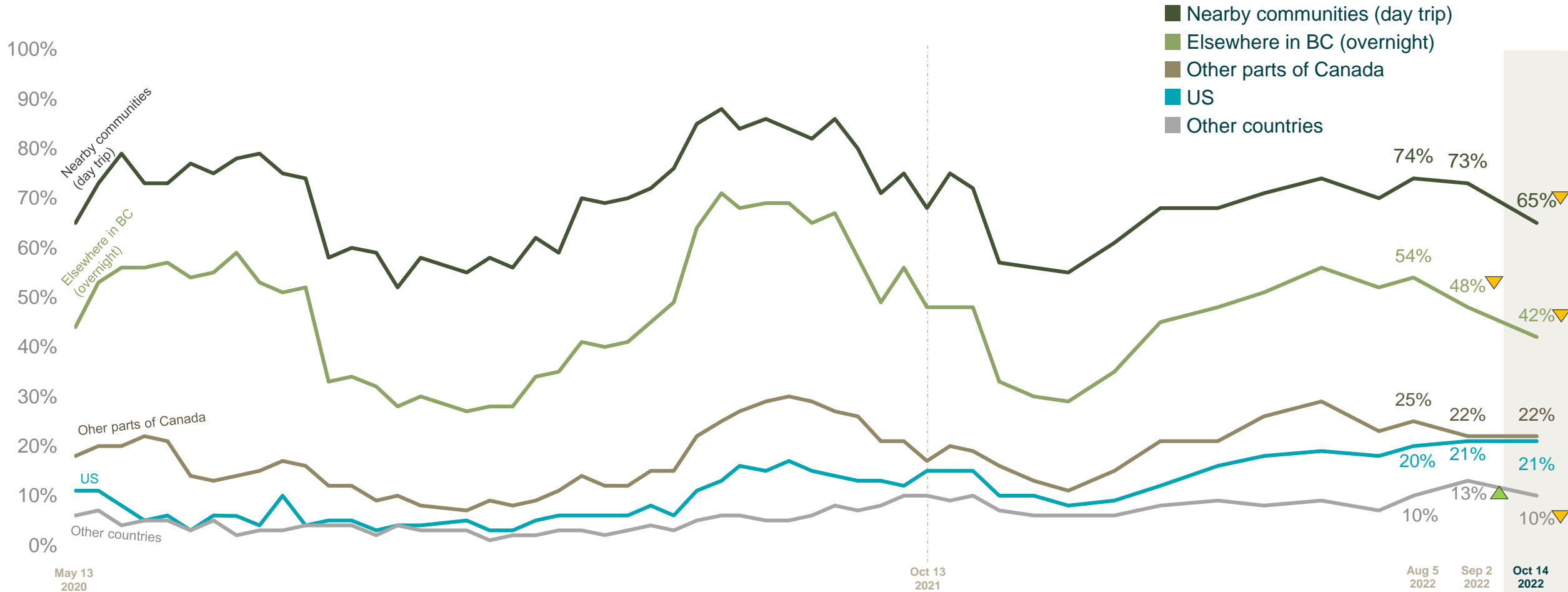


NOTE: Response category “only when vaccine or treatment for COVID-19 available” removed Jun 23, 2021.  
 Base: All respondents  
 D3. When, if at all, are you likely to make trips to the following destinations?

▲ 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?

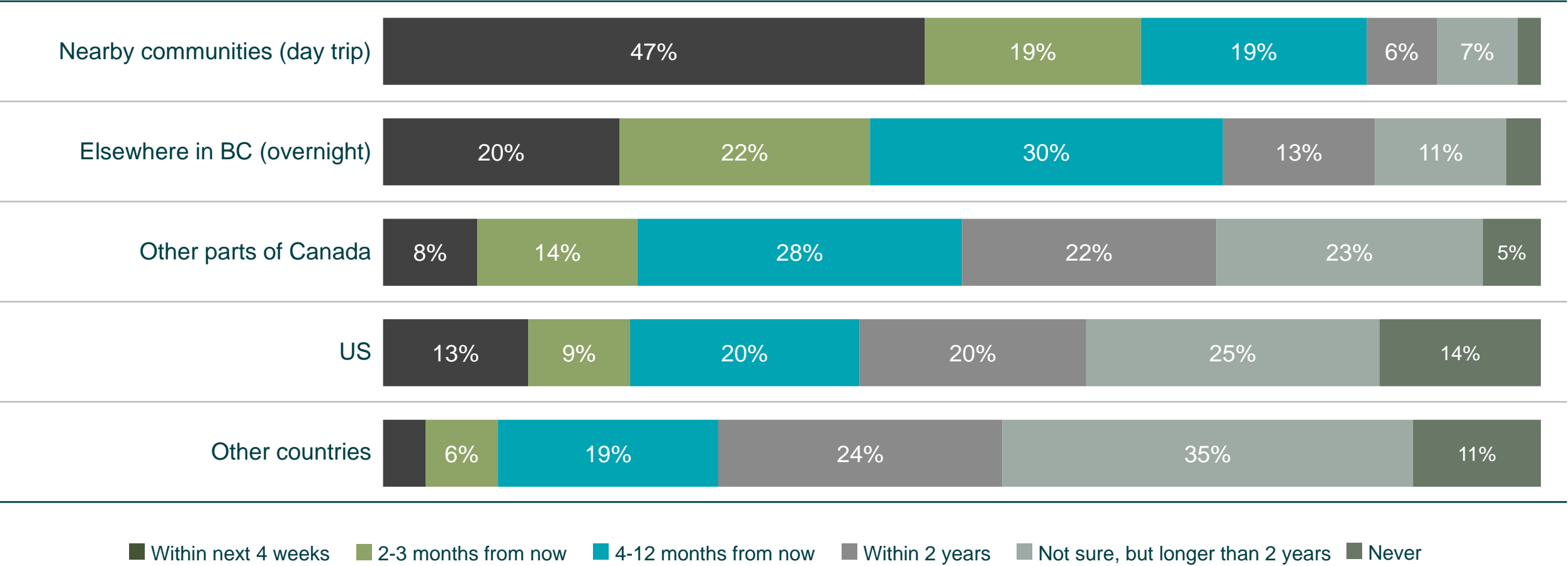
Due to rounding, the total may not equal 100% to the sum of individual values shown.

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

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

# Snapshot Of British Columbians' Travel Intentions

(Wave 51 – October 14, 2022)



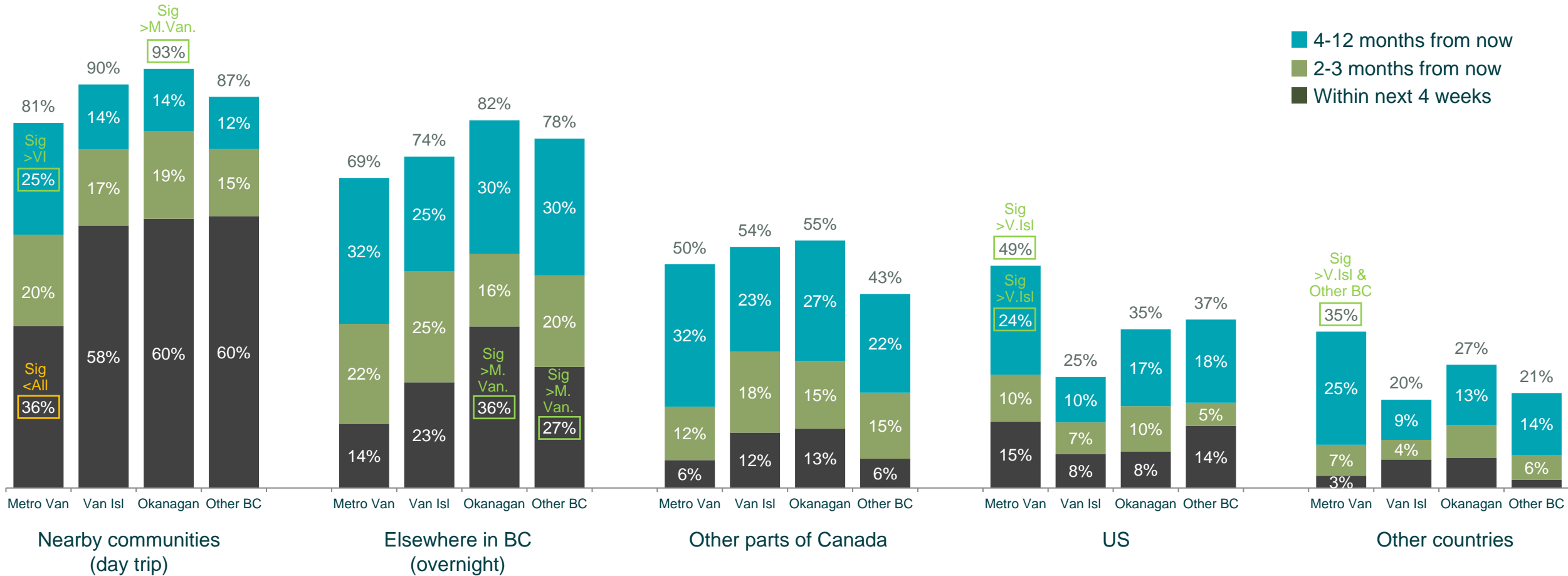
Base: All respondents  
 D3. When, if at all, are you likely to make trips to the following destinations?  
 Due to rounding, the sum of the individual values shown may not add up to 100%.

# Snapshot Of British Columbians' Travel Intentions By Region

(Wave 51 – October 14, 2022)



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



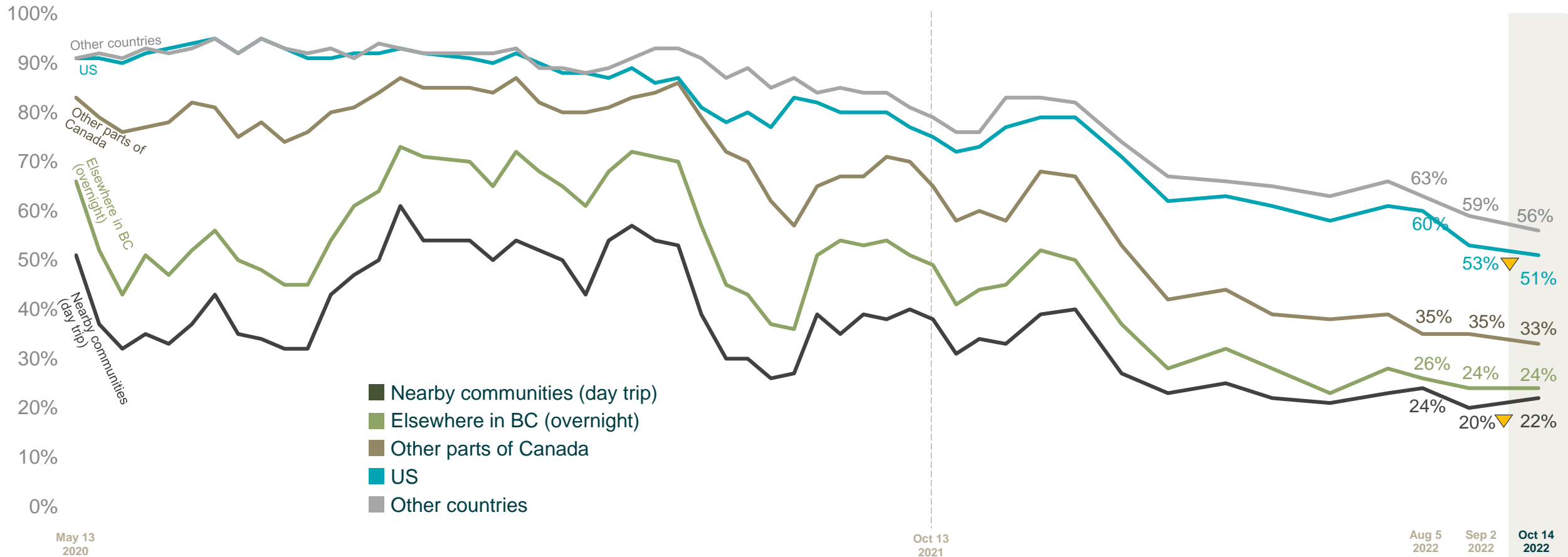
   Statistically significantly **higher** than comparison group(s).  
   Statistically significantly **lower** than comparison group(s).

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

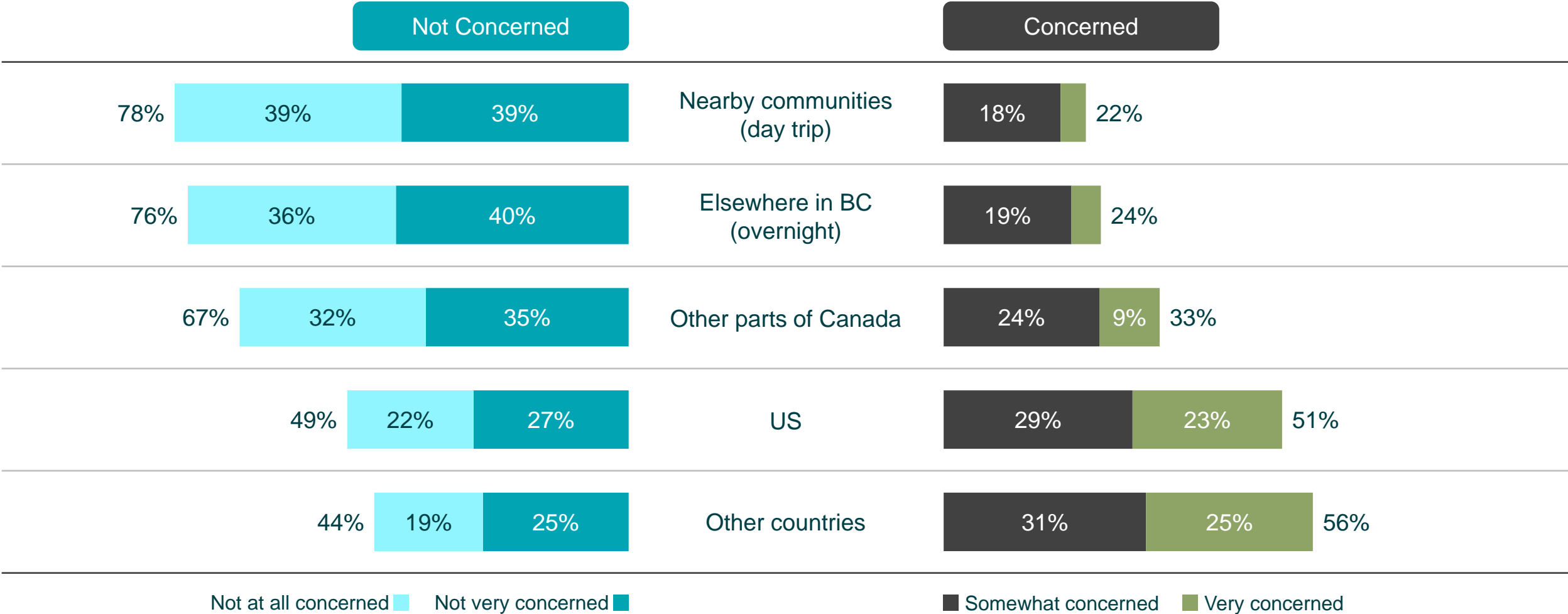
(Total Very/Somewhat Concerned By Visitor Origin)



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

# Snapshot Of British Columbians' Concern Welcoming Visitors

(Wave 51 – October 14, 2022)



Not at all concerned Not very concerned

Somewhat concerned Very concerned

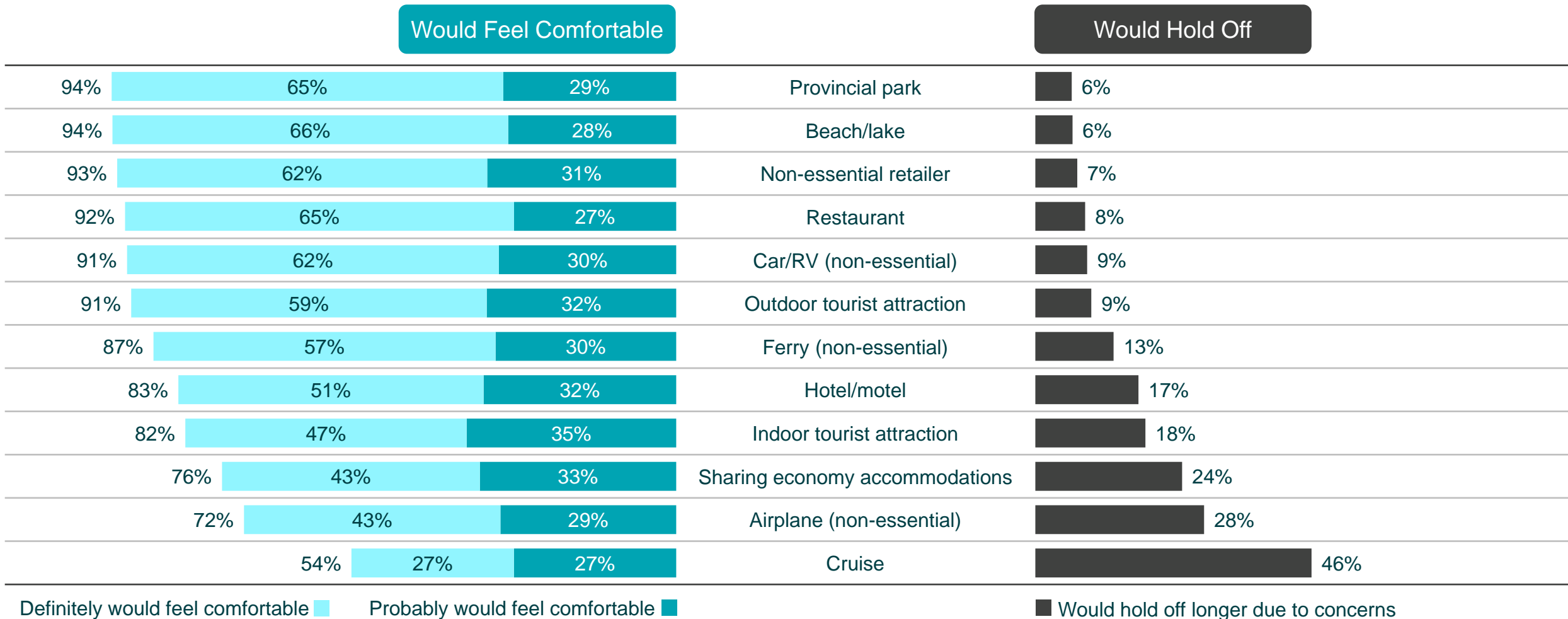
Base: All respondents  
 D2. Given the current situation with COVID-19, how concerned would you be with the following types of visitors making non-essential trips into your community over the next few weeks?  
 Due to rounding, the sum of the individual values shown may not add up to the total shown.

# COMFORT LEVELS BY ACTIVITY / TRANSPORTATION / ACCOMMODATION



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

(Wave 51 – October 14, 2022)

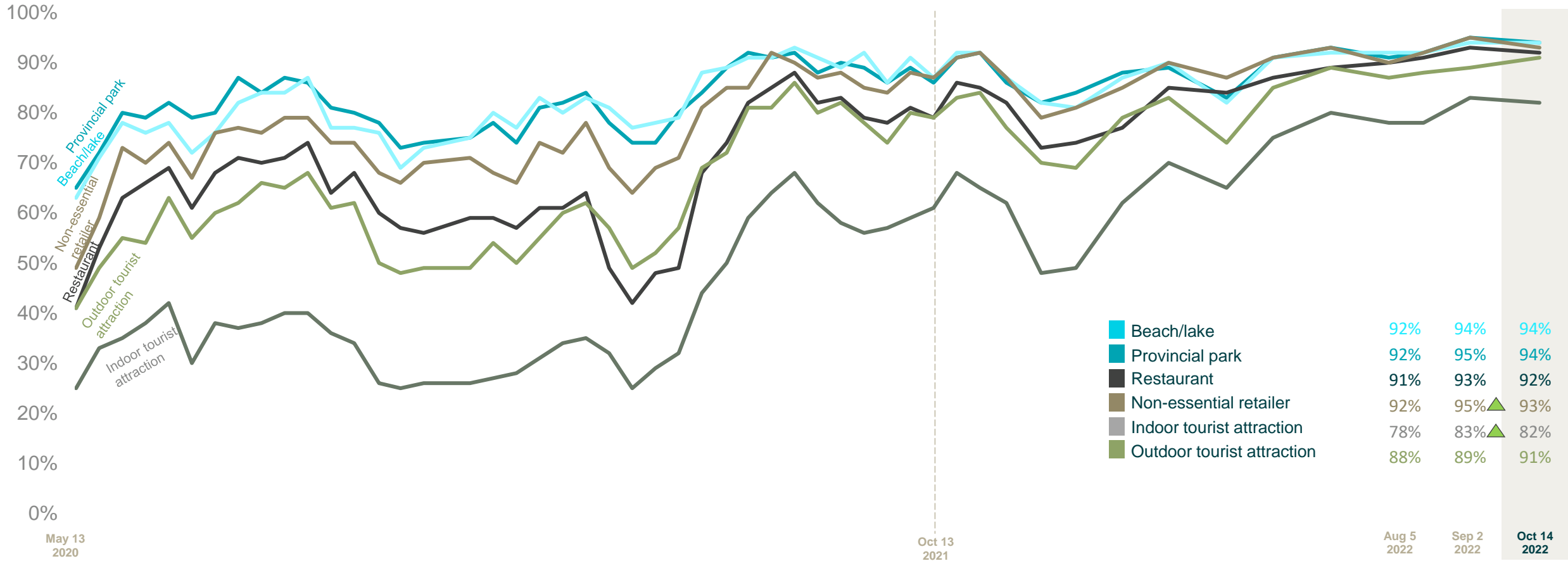


Base: All respondents, excluding not applicable/don't do this in general and not applicable/wouldn't do this at this time of year  
 D1. Would you be comfortable doing/using each of the following in the next few weeks, or are you be likely to hold off longer due to concerns about COVID-19?  
 Due to 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)

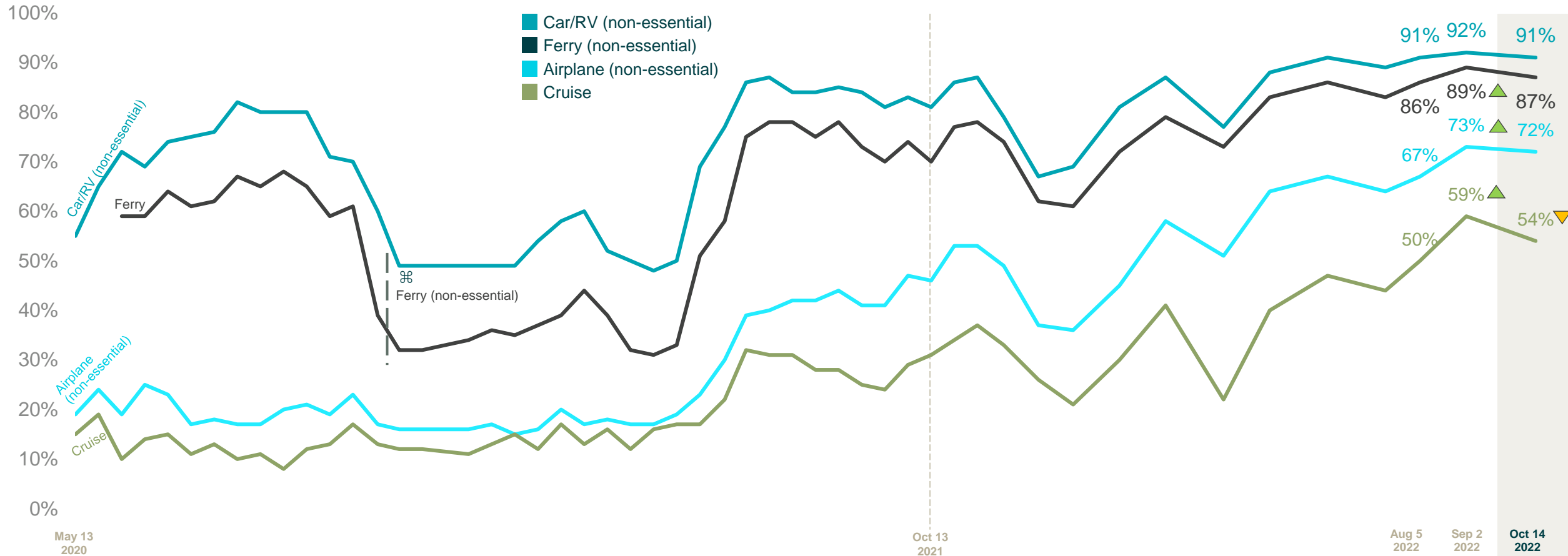


Base: All respondents, excluding not applicable/don't do this in general and not applicable/wouldn't do this at this time of year  
 D1. Would you be comfortable doing/using each of the following in the next few weeks, or are you be likely to hold off longer due to concerns about COVID-19?

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

# 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

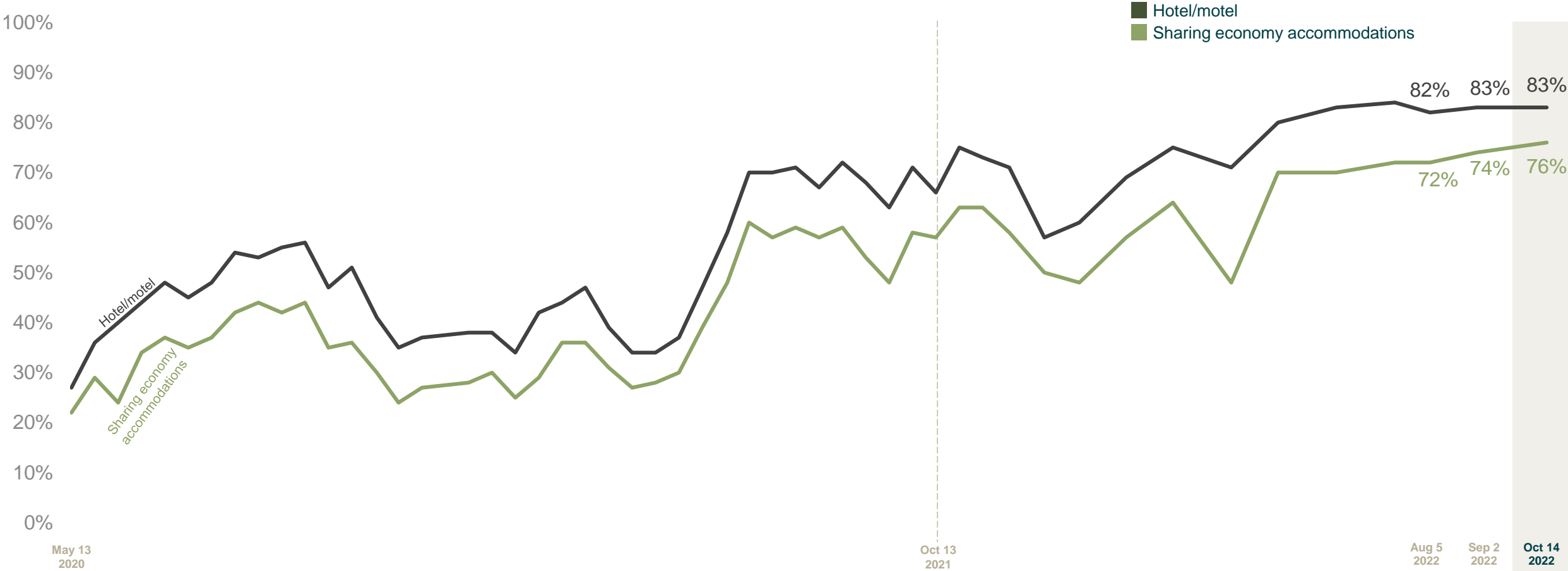
D1. Would you be comfortable doing/using each of the following in the next few weeks, or are you be likely to hold off longer due to concerns about COVID-19?

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

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

# Tracking British Columbians' Comfort Levels With Accommodation

(Total Definitely/Probably Would By Accommodation Type)



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 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.

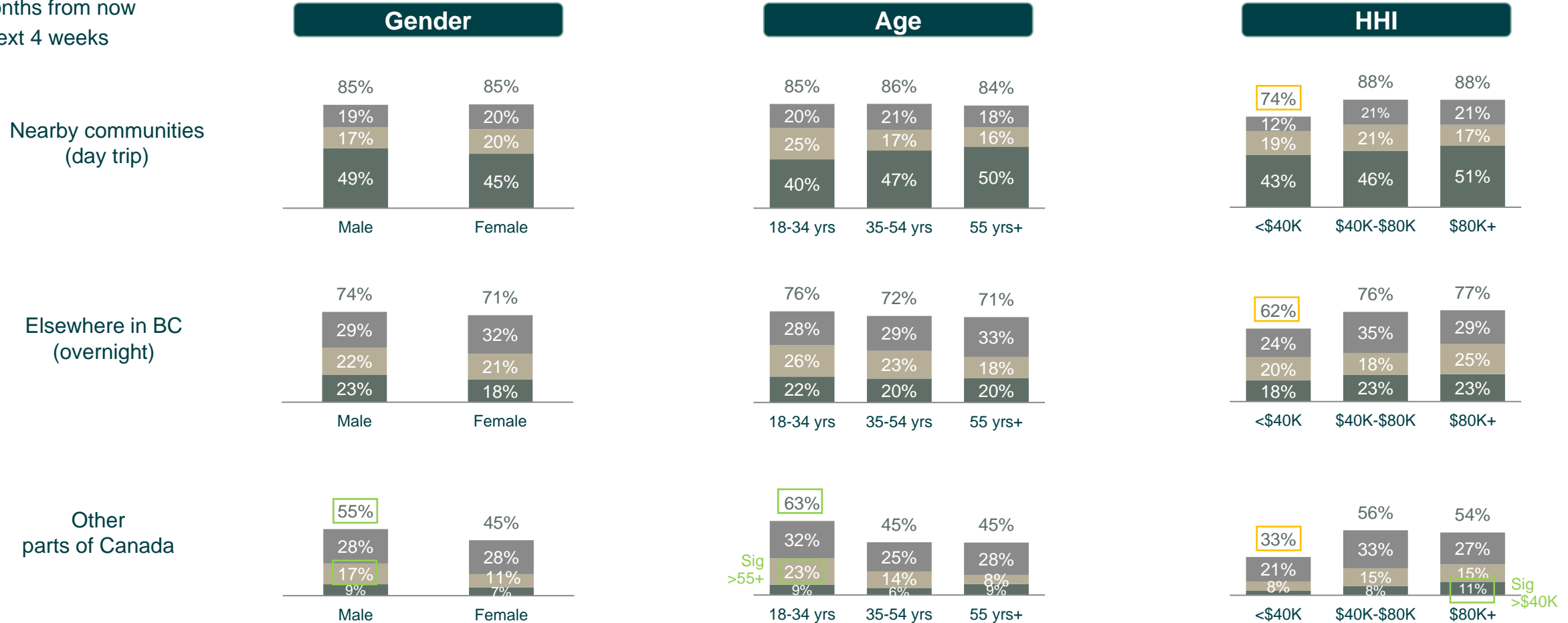
# APPENDIX: METRICS BY DEMOGRAPHICS

# Snapshot Of British Columbians' Travel Intent By Demographics

(Wave 51 – October 14, 2022)



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

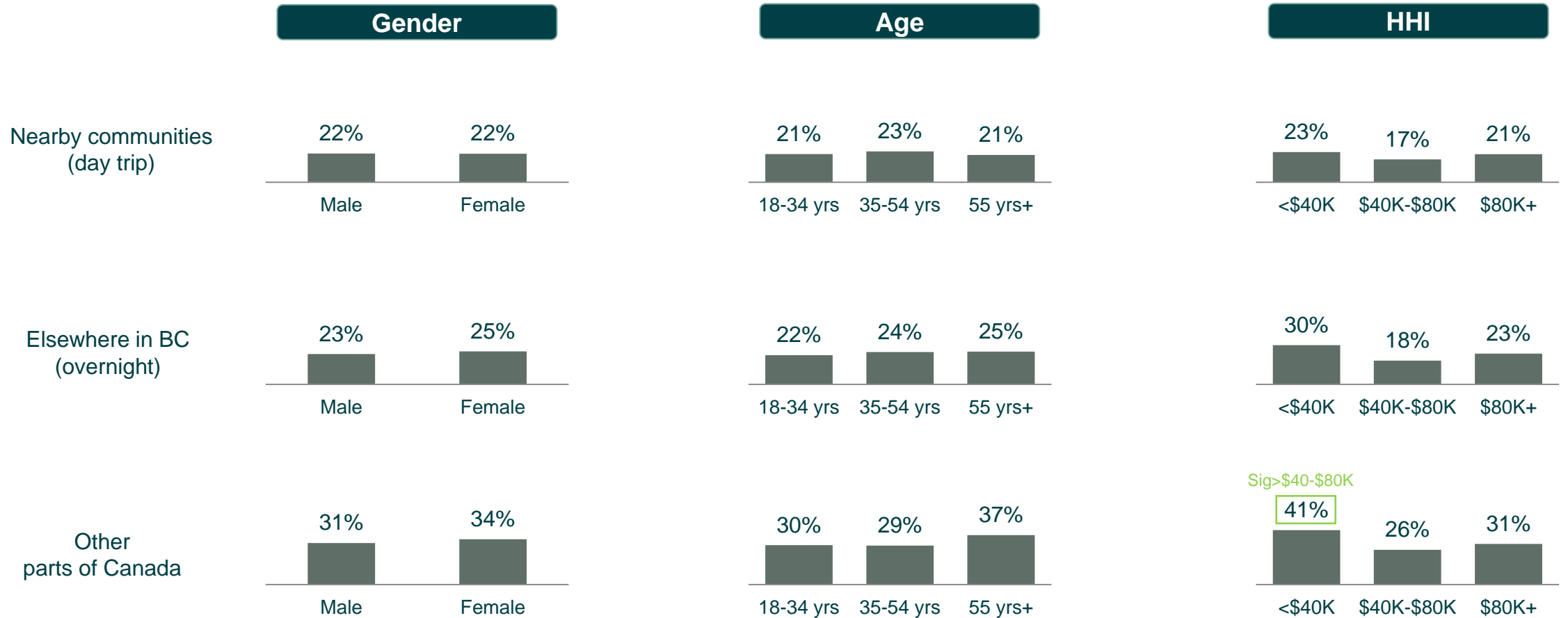


Base: All respondents  
 D3. When, if at all, are you likely to make trips to the following destinations?  
 Due to rounding, the total may not equal 100% to the sum of individual values shown.

□ 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 51 – October 14, 2022)



Sig->\$40-\$80K

41%

  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



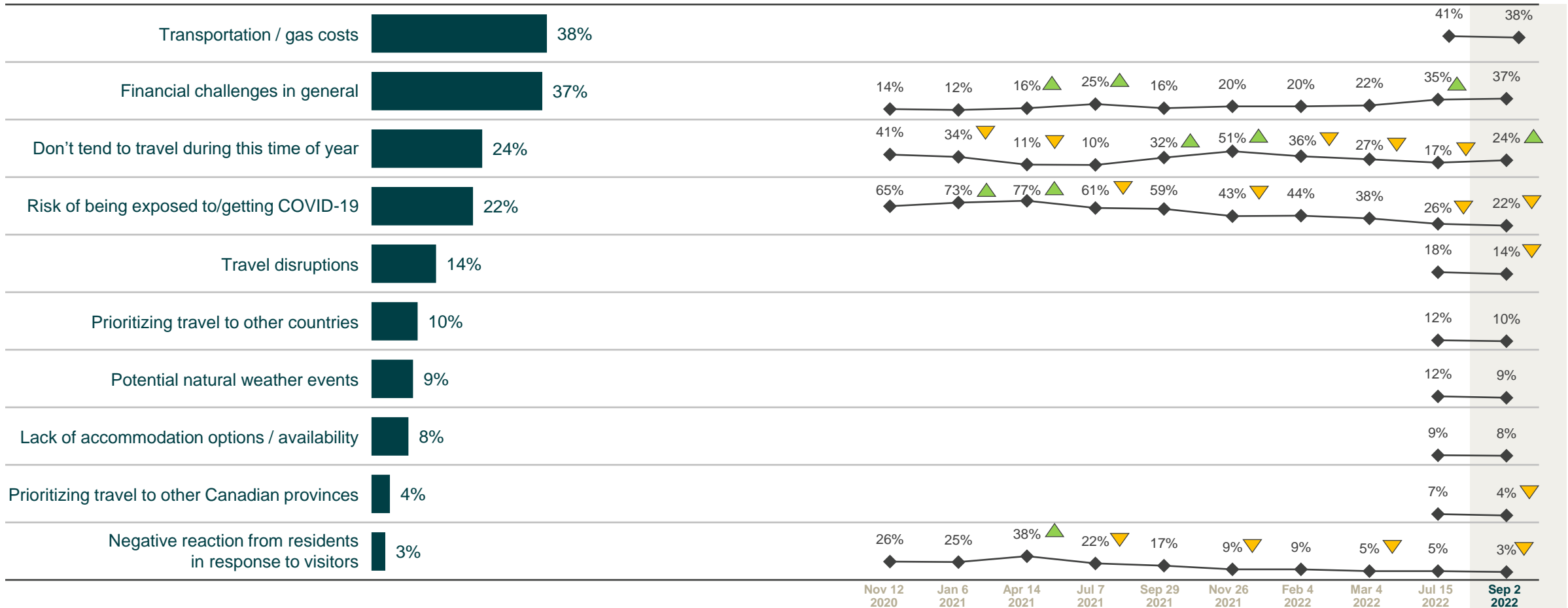
# Reasons For Not Considering Future BC Travel (Aided)

(Among those not intending to take an overnight trip in BC in the next 3 months)



September 2, 2022

Tracking

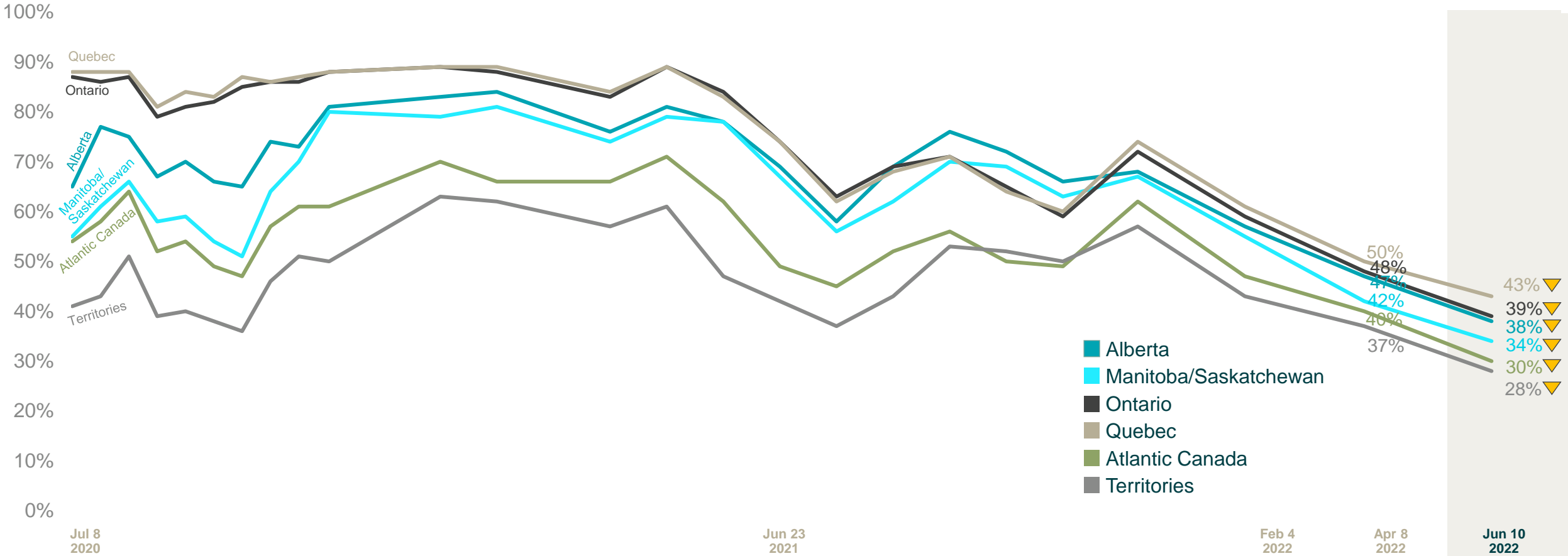


Base: Those who are not likely to take an overnight trip in BC in the next 3 months D4new. Why are you **not** likely to take an overnight trip in BC in the next 3 months?

▲ 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)

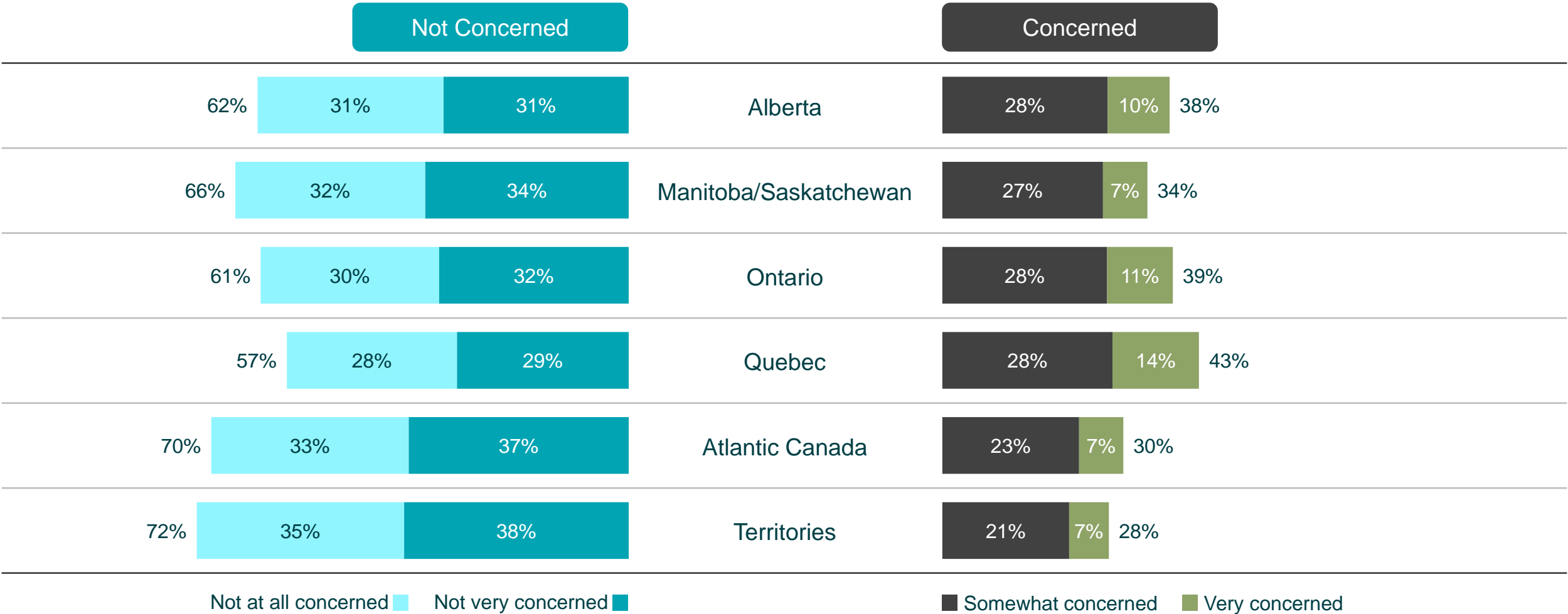


▲ Statistically significantly **higher** than previous wave.  
 ▼ Statistically significantly **lower** than previous wave.

⌘ Question frequency changed from bi-weekly to monthly starting November 12, 2020 and is now asked as needed.  
 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 48 – July 15, 2022)



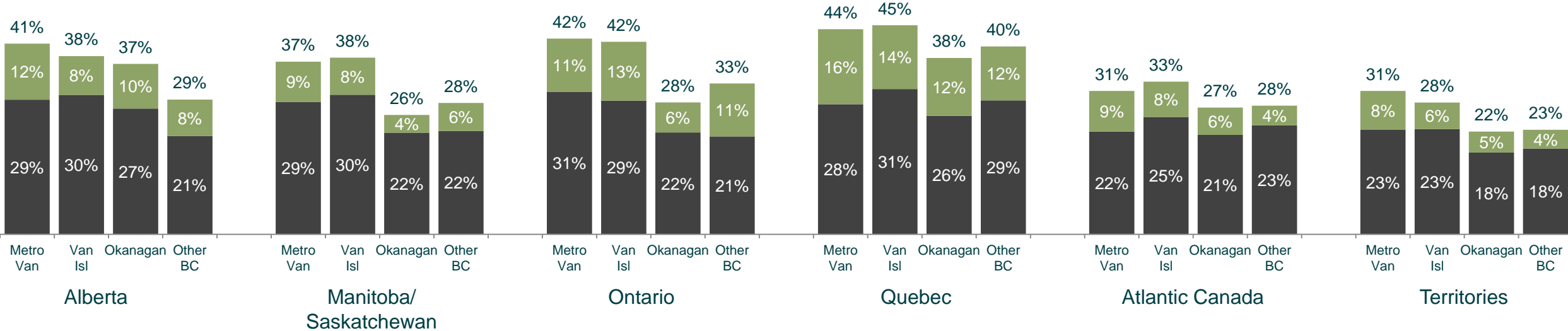
Base: All respondents  
 D2a. And how concerned would you be with the following types of Canadian visitors making non-essential trips into your community over the next few weeks?  
 Due to rounding, the sum of the individual values shown may not add up to the total shown.

# Snapshot Of British Columbians' Concern Welcoming Canadian Visitors By Region

(Wave 48 – July 15, 2022)



Very concerned  
Somewhat concerned

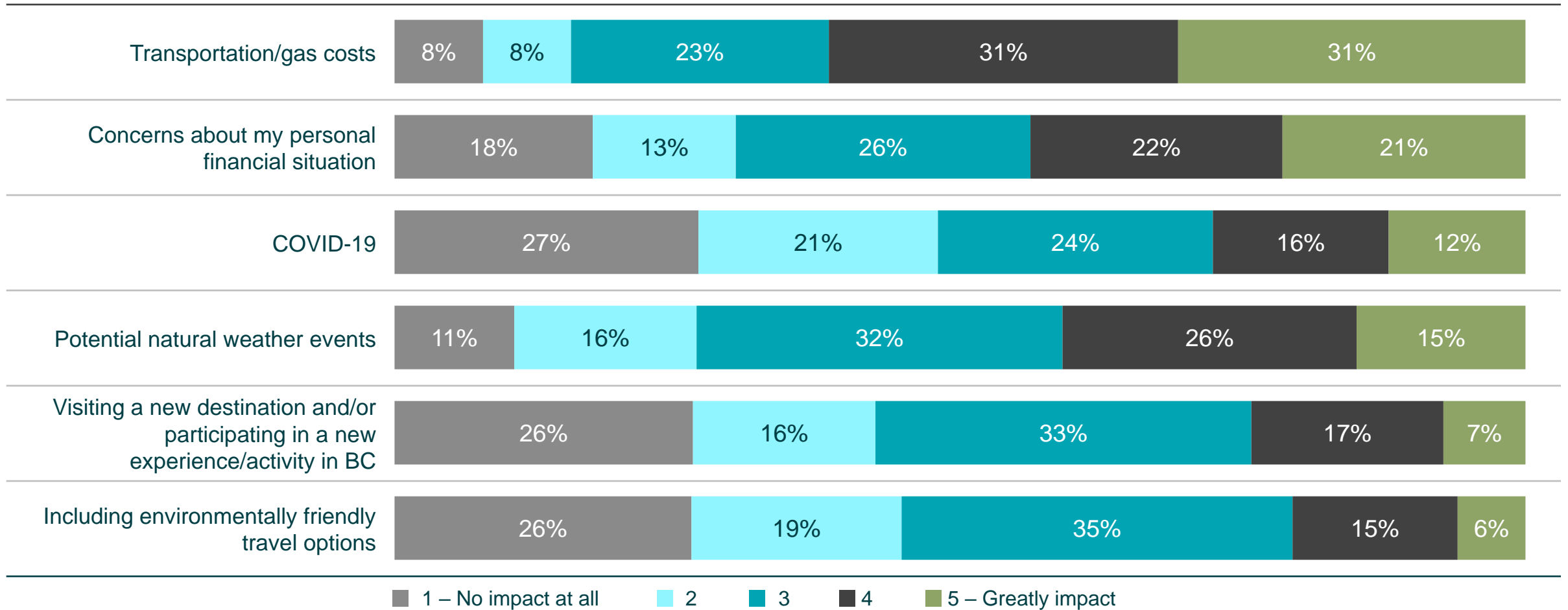


Statistically significantly **higher** than comparison group(s).  
Statistically significantly **lower** than comparison group(s).

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.

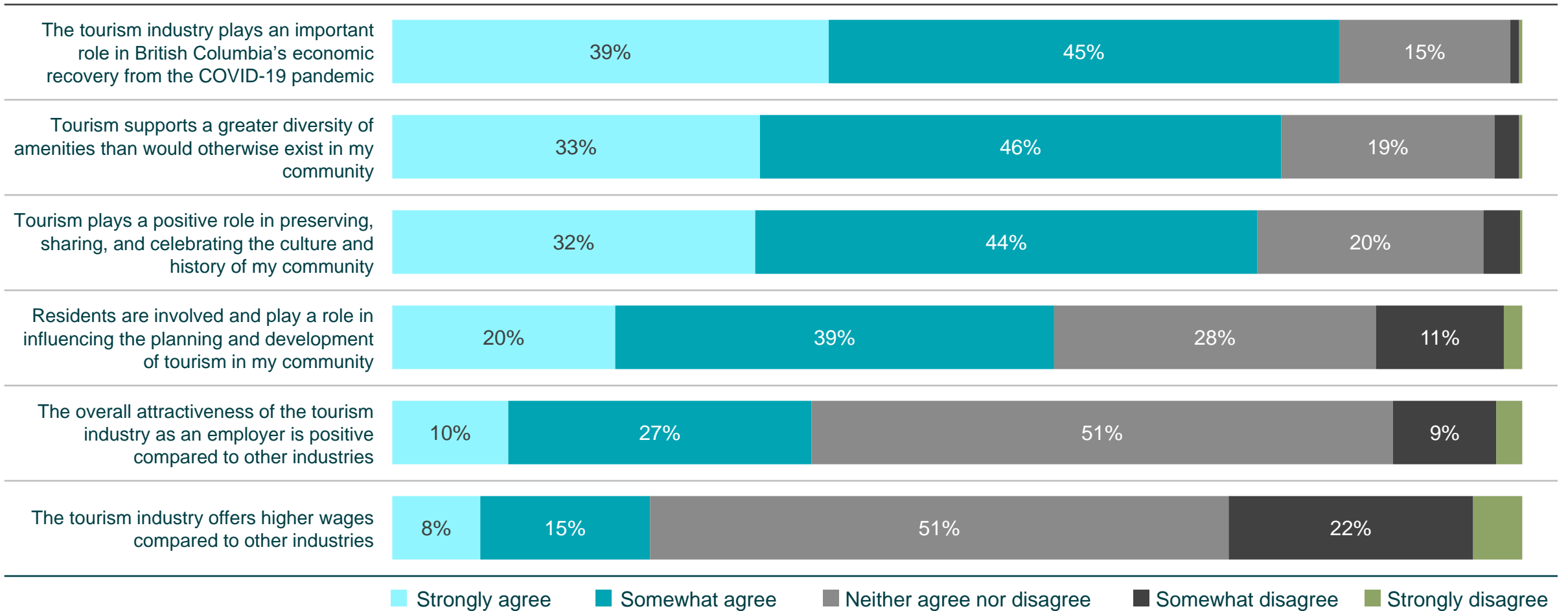
# Impact of Factors on Overnight Travel in BC this Summer

(Wave 47 – June 10, 2022)



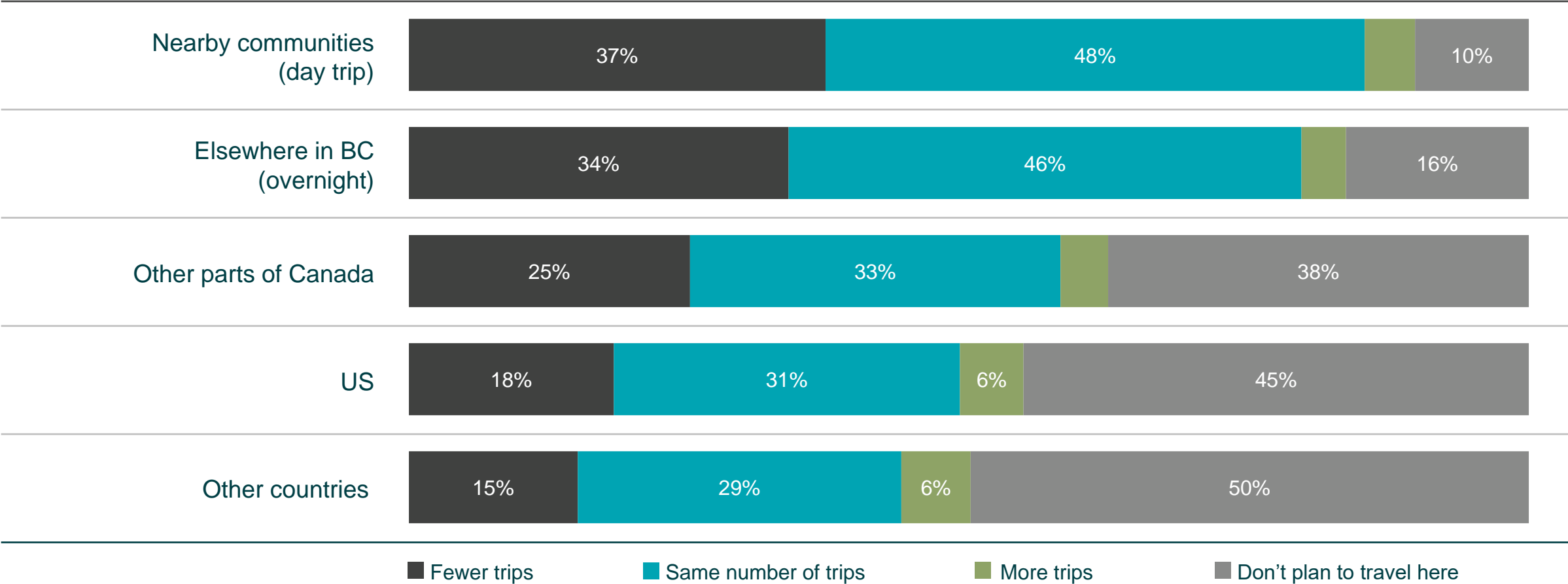
# Importance of Tourism

(Wave 45 – Apr 8, 2022)



# Impact of Gas Prices on Spring/Summer Travel Intentions

(Wave 45 – Apr 8, 2022)



Base: All respondents  
 ADHOC APR\_B. How will the rising price of gas/fuel impact the number of trips you take to the following destinations this Spring/Summer?

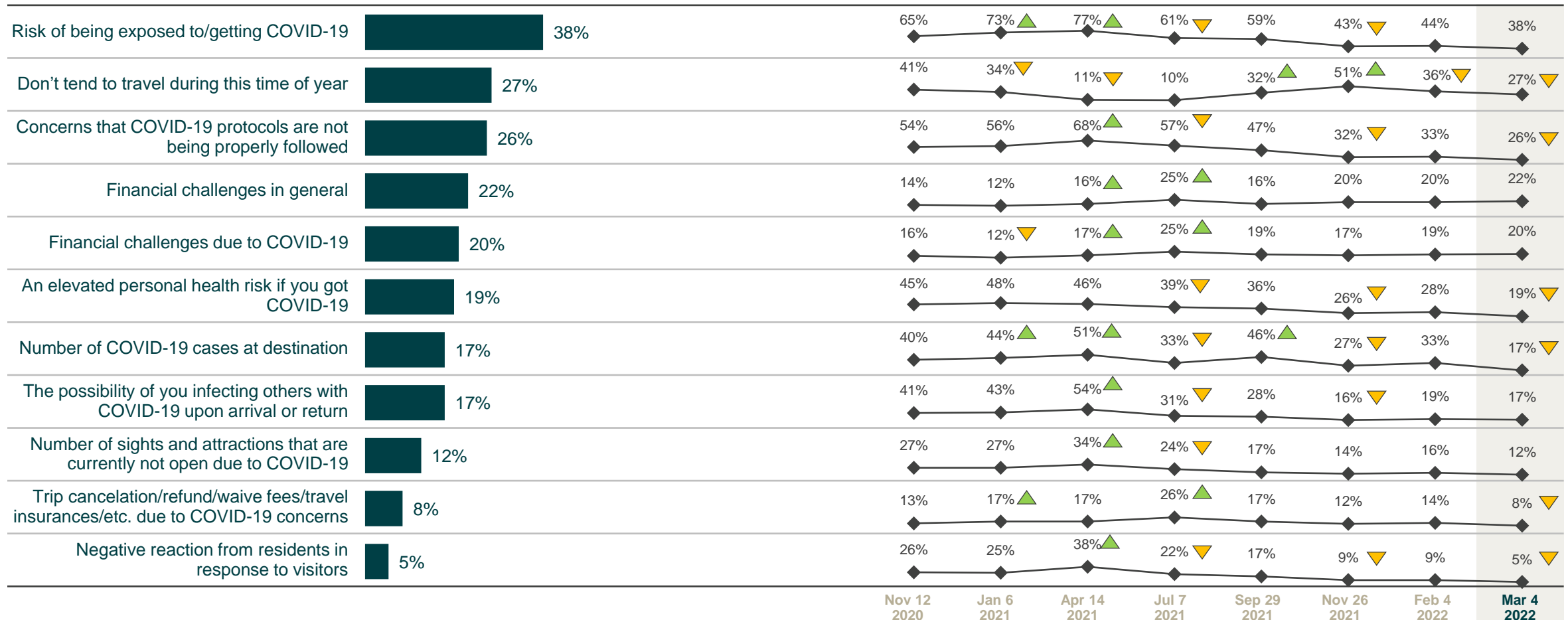
# Reasons For Not Considering Future BC Travel (Aided)

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



March 4, 2022

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.

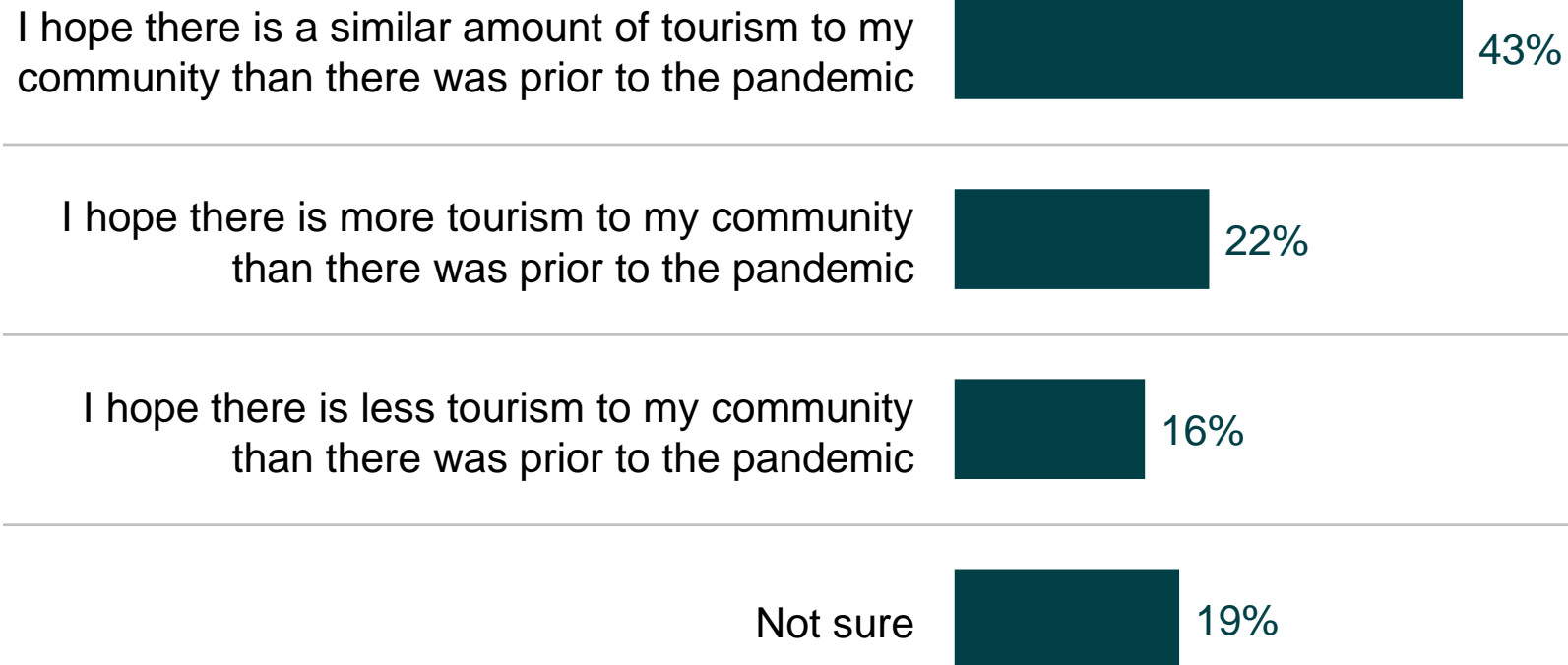


# Attitudes Towards Tourism Post-COVID-19

(Wave 44 - March 4, 2022)

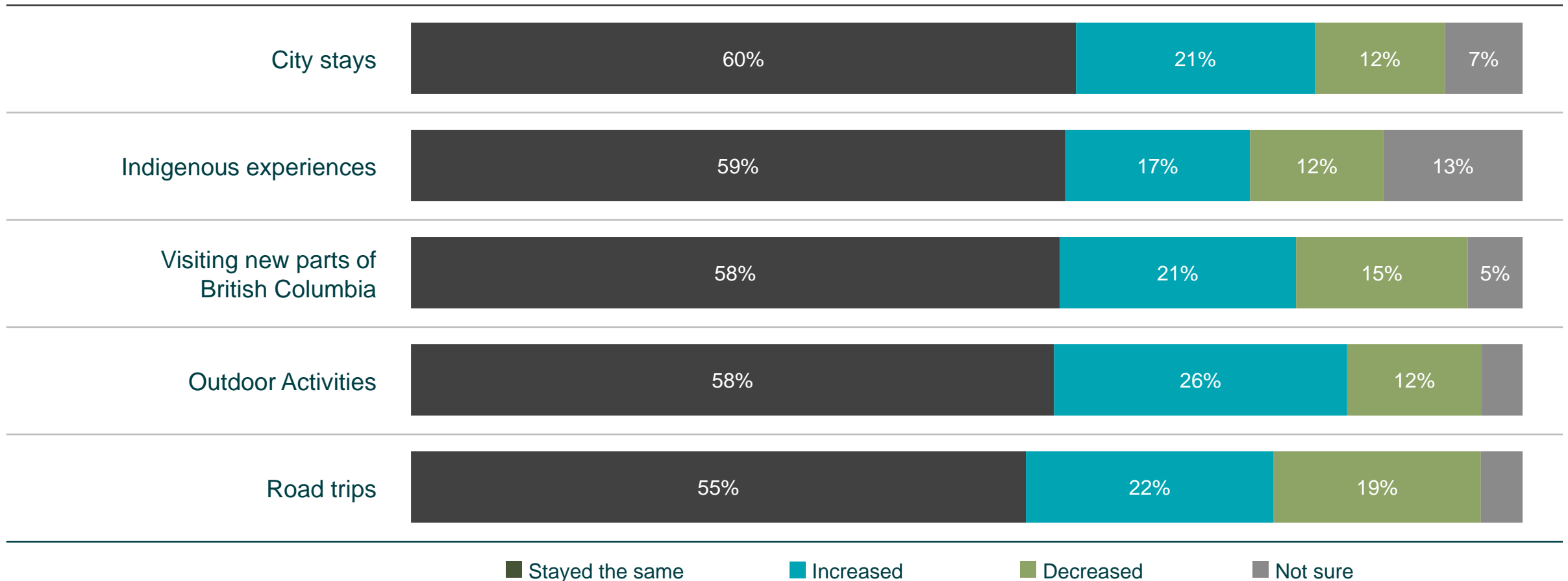


## % of Agreement



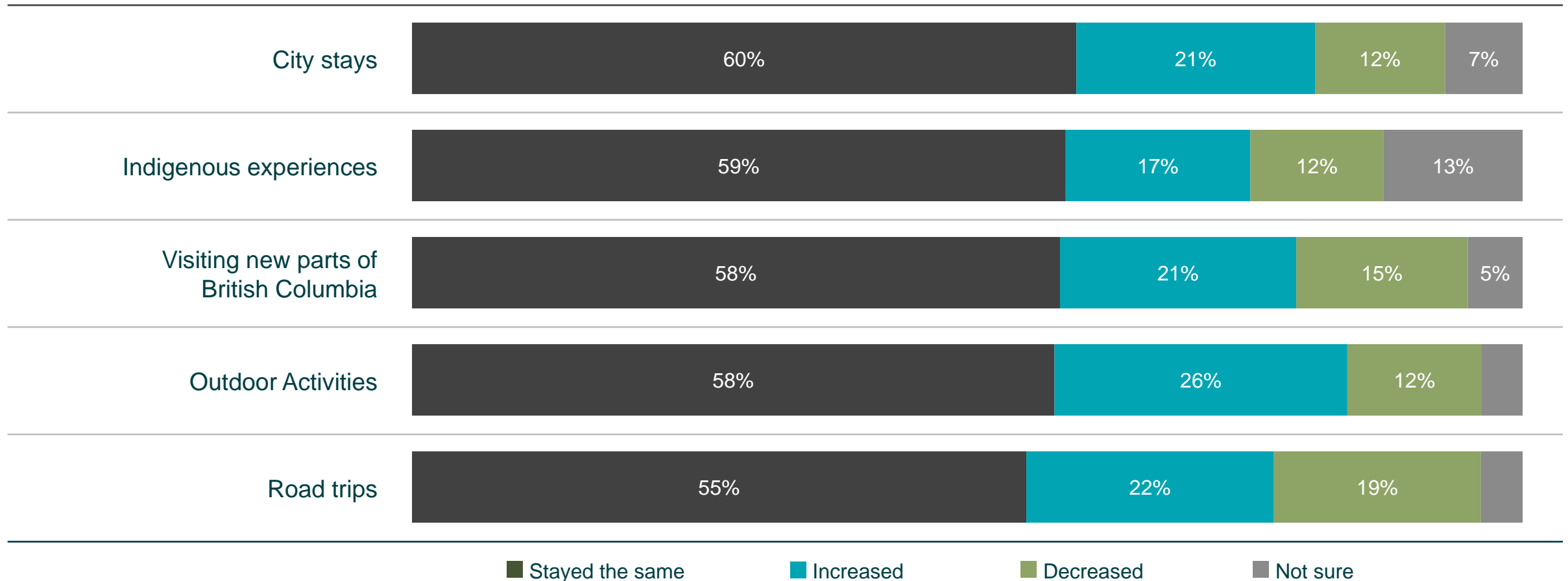
# Interest in BC Activities/Experiences Compared to Two Years Ago

(Wave 44 – Mar 4, 2022)



# Interest in BC Activities/Experiences Compared to Two Years Ago

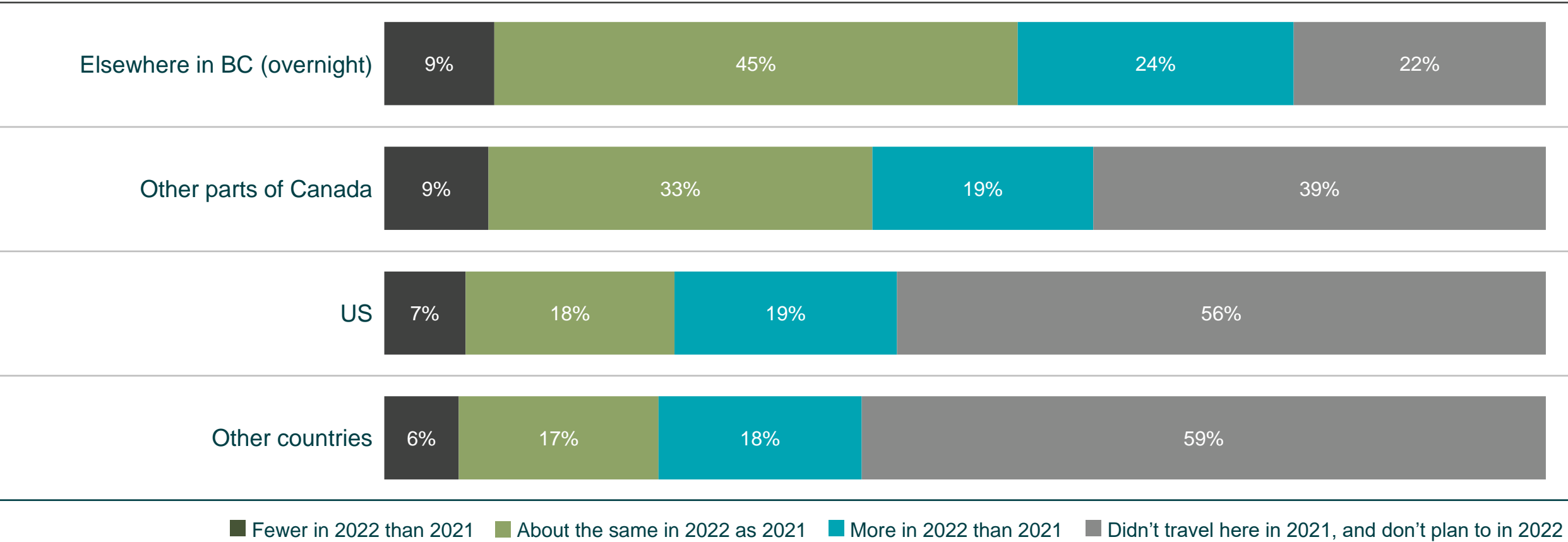
(Wave 44 – Mar 4, 2022)



■ Stayed the same ■ Increased ■ Decreased ■ Not sure

# Likely 2022 Travel Compared to 2021

(Wave 41 – Jan 7, 2022)

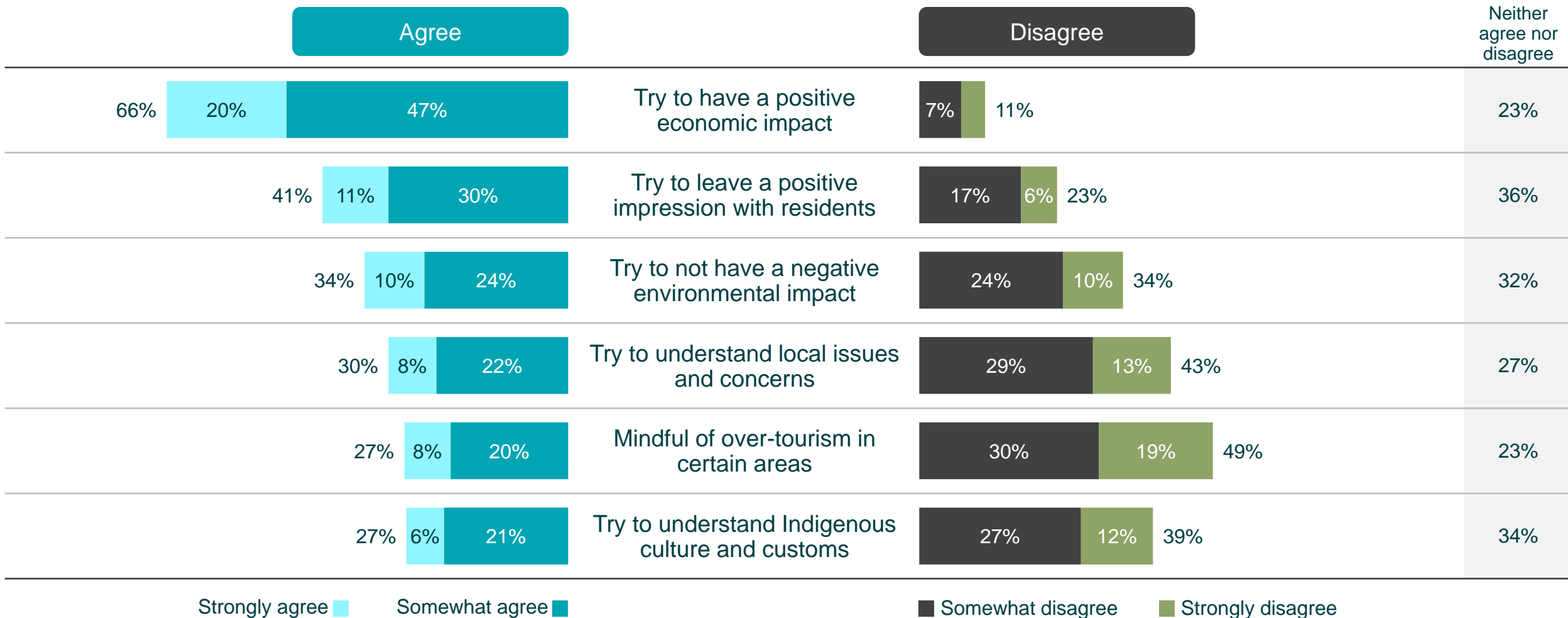


█ Statistically significantly **higher** than comparison group(s).  
█ Statistically significantly **lower** than comparison group(s).

Base: All respondents  
 D14. Compared to last year (2021), how much do you plan to travel this year (2022) to each of the following to destinations for leisure and/or visiting friends and family? (Please do not consider any trips for businesses purposes).

# British Columbians' Views On Visitors

(Wave 32 – August 4, 2021)



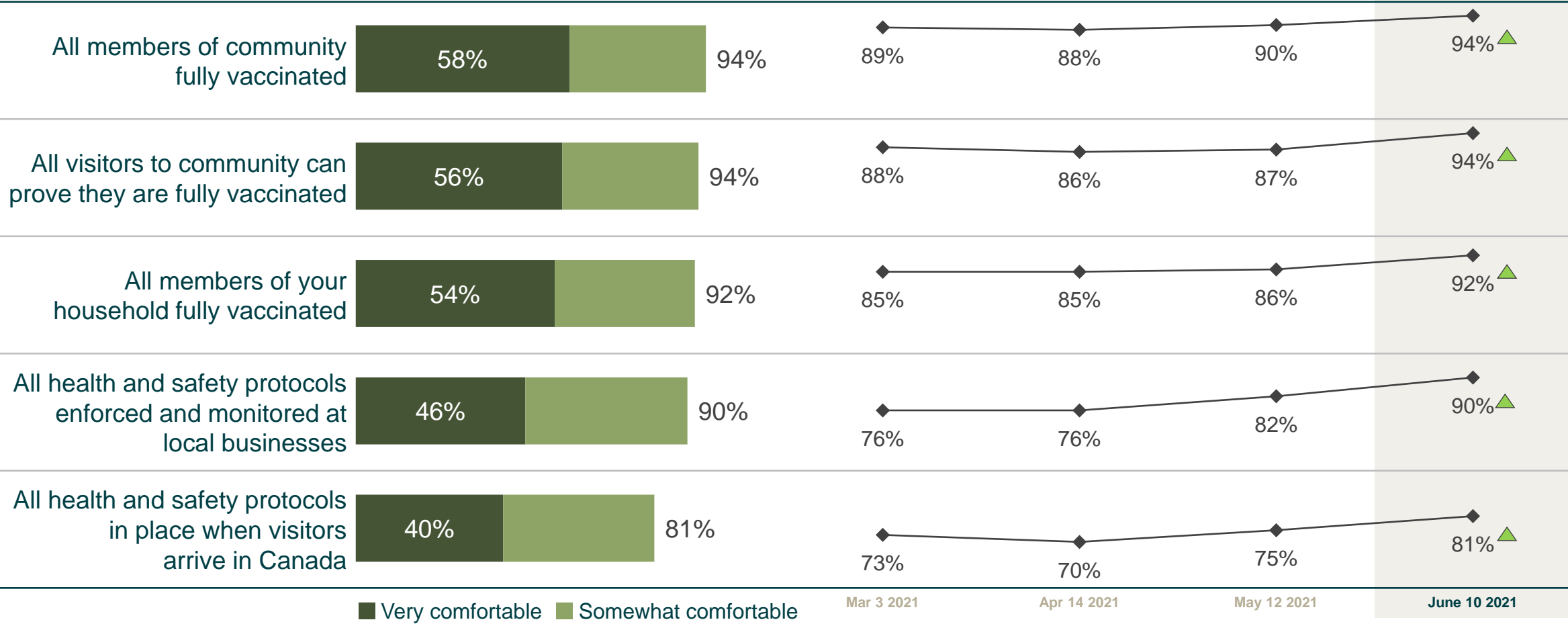
Base: All respondents  
 D11. How much do you agree or disagree with each of the following statements?  
 Due to rounding, the sum of the individual values shown may not add up to the total shown.

# Comfort With Welcoming Visitors Under Various Circumstances



**June 10, 2021**

**Tracking**



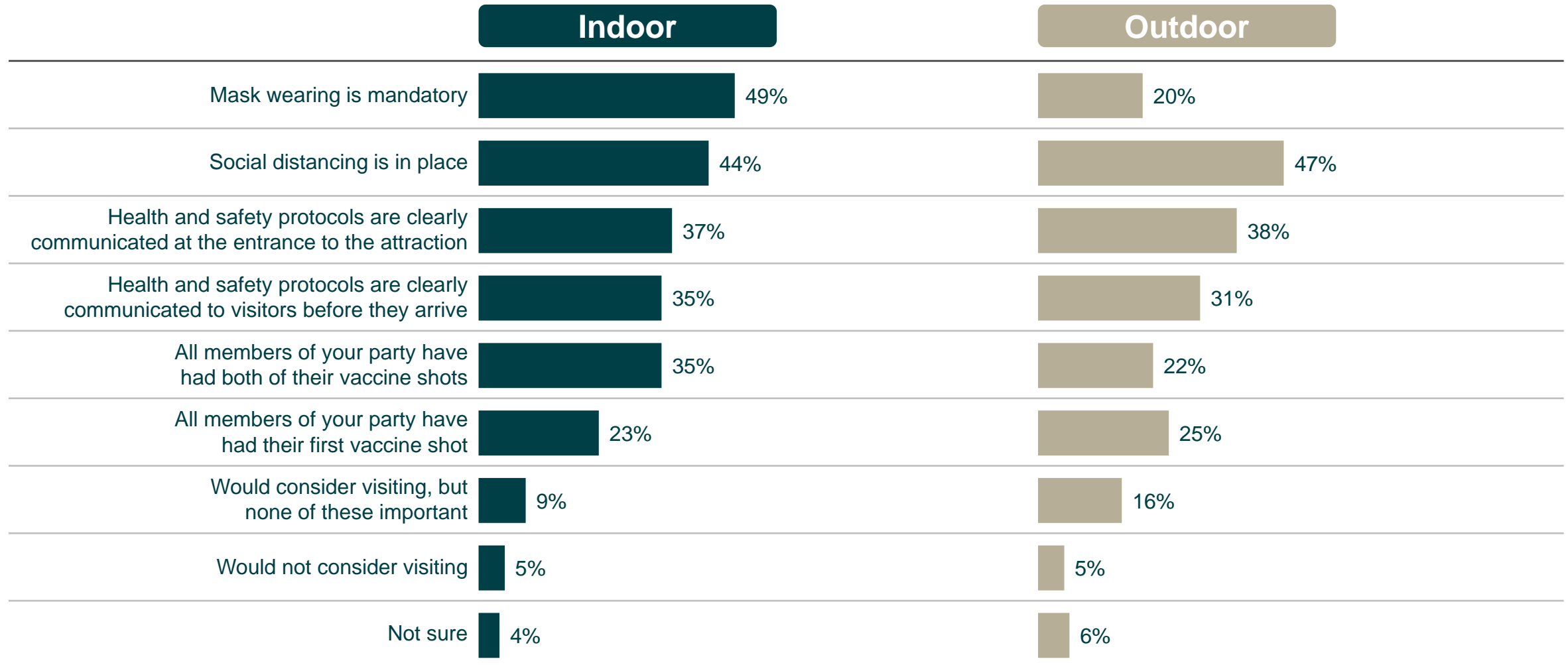
■ Very comfortable ■ Somewhat comfortable

▲ 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)

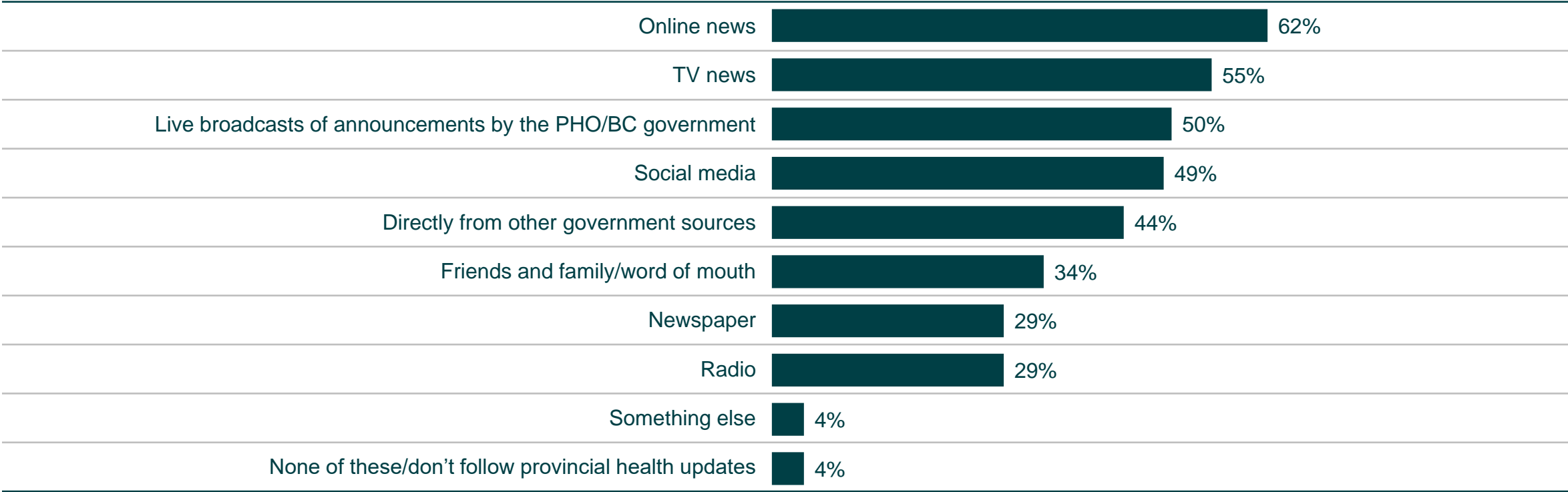


# Source Of Provincial COVID-19 Health Updates

(Wave 21 - March 3, 2021)



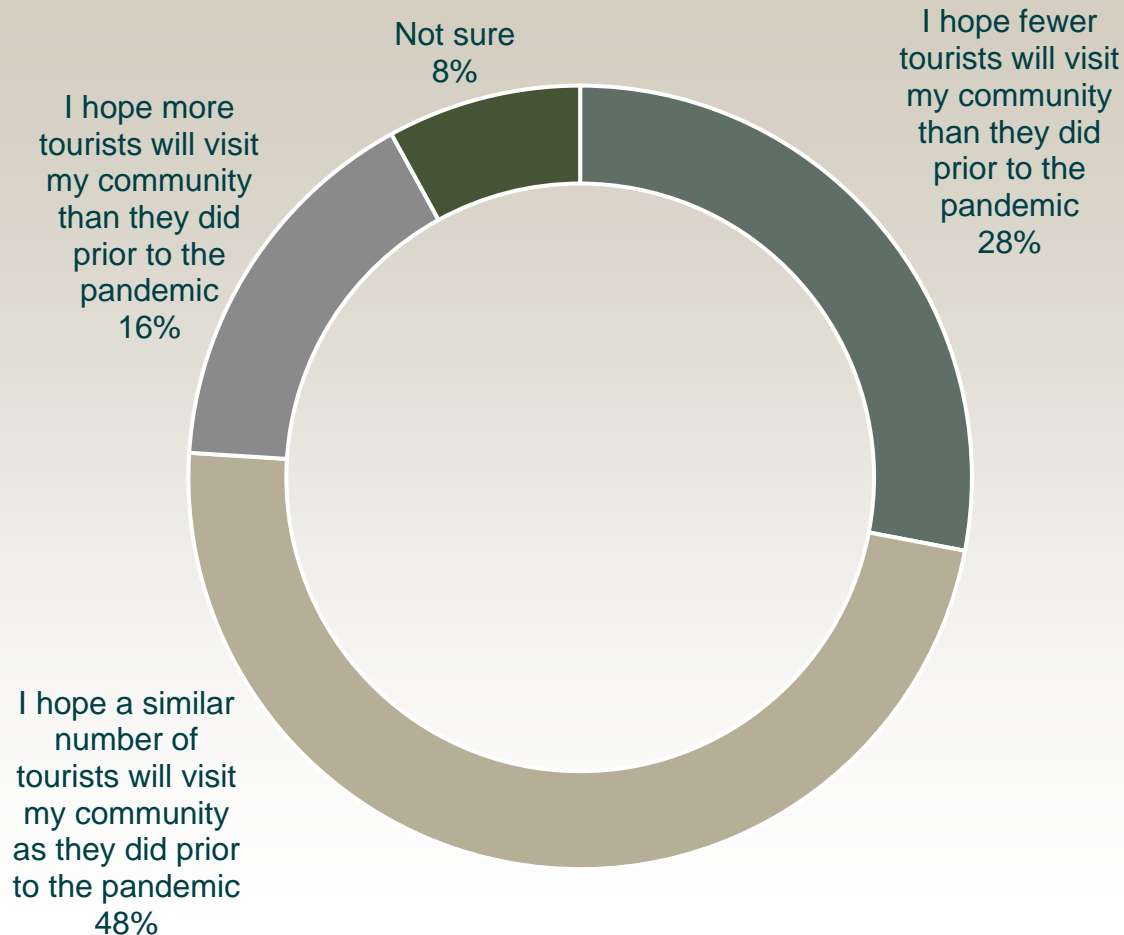
**March 3, 2021**  
(n=827)





# 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).

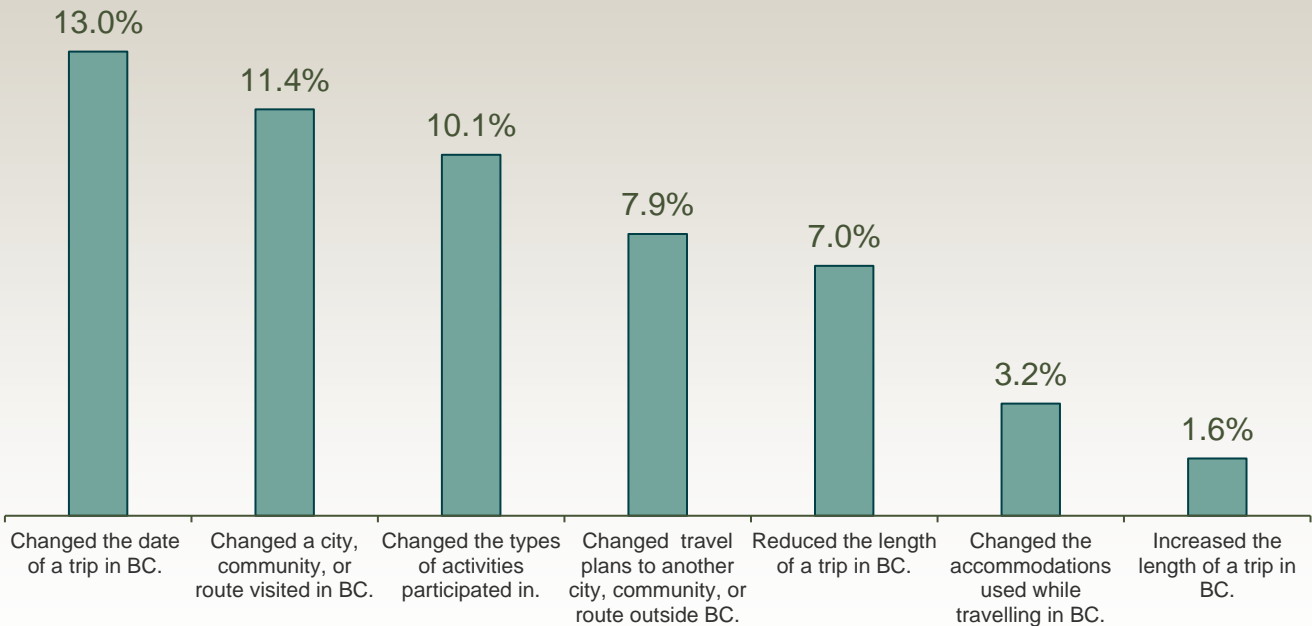
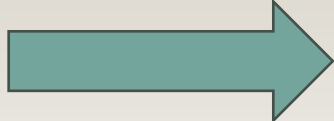
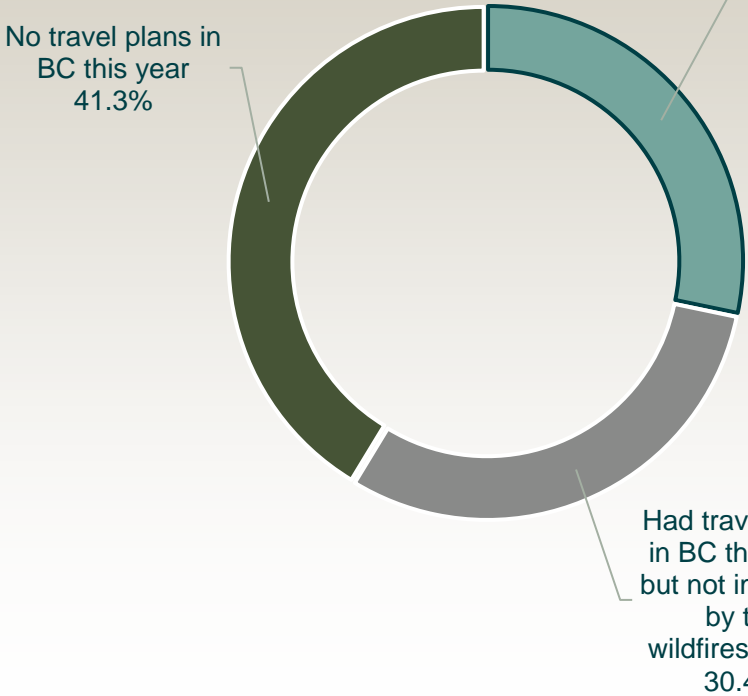
# Impact Of Wildfires/Smoke On Residents' BC Travel Plans

(Wave 34 – Sept 1, 2021)



## 28.3%

Travel plans impacted/changed



Base: All respondents, D12. Did you have any travel plans in British Columbia that were impacted by the wildfires and/or the smoke?



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

**For more information, please contact:**

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