



DESTINATION  
BRITISH COLUMBIA®

BC Residents' Public Perceptions:  
COVID-19 Travel and Tourism  
Wave 48: July 15, 2022

Report prepared by: Leger

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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%
<b>48</b>	<b>Jul 15-17, 2022</b>	<b>1,003</b>	<b>+/-3.1%</b>

# KEY HIGHLIGHTS – WHAT’S NEW OR CHANGED



## PAST TRAVEL (SLIDES 6-7)

- Measured quarterly, reported travel in the April-June 2022 time period not surprisingly was up compared to the previous quarter, except for going to other countries. Compared to this same period last year, April-June 2021, overnight BC trips were stable at 34%, trips to other provinces was up +5 points to 13%, trips to the US was up +13 points to 14%, and trips to other countries was up +6 points to 7%.

## TRAVEL INTENTIONS (SLIDES 8-12)

- Short term (next 4 weeks) travel prospects within BC has levelled off (no change for day trips and up directionally +2 points for overnight). As is the traditional season pattern, medium term (within 2-3 months) travel intentions are dipping, with a significant -4 point drop for day trips and a directional decrease for overnight. In comparing to July 2021, intentions to travel for day trips in BC in the next 4 weeks are down -12 points and intentions to travel for overnight trips in BC are down for -10 points.
- Short term (next 4 weeks) prospects for travel to other provinces is stable but has dropped -6 points for the next 2-3 months. Both short and medium term travel intentions to other parts of Canada is similar to the same time last year.
- Travel intentions to the US are up +3 points over the next 4 weeks and have levelled off for the next 2-3 months, while it is stable for both short and medium term for destinations in other countries. Current travel intentions levels for destinations outside of Canada are similar to July 2021.

## CONCERN WELCOMING VISITORS (SLIDES 13-15)

- BC residents' concern welcoming visitors from most markets is stable and continues to be near record lows, with the exception of overnight BC visitors which increased +5 points to 28%.

# KEY HIGHLIGHTS – WHAT'S NEW OR CHANGED



## COMFORT WITH ACTIVITIES/MODES OF TRANSPORTATION (SLIDES 16-20)

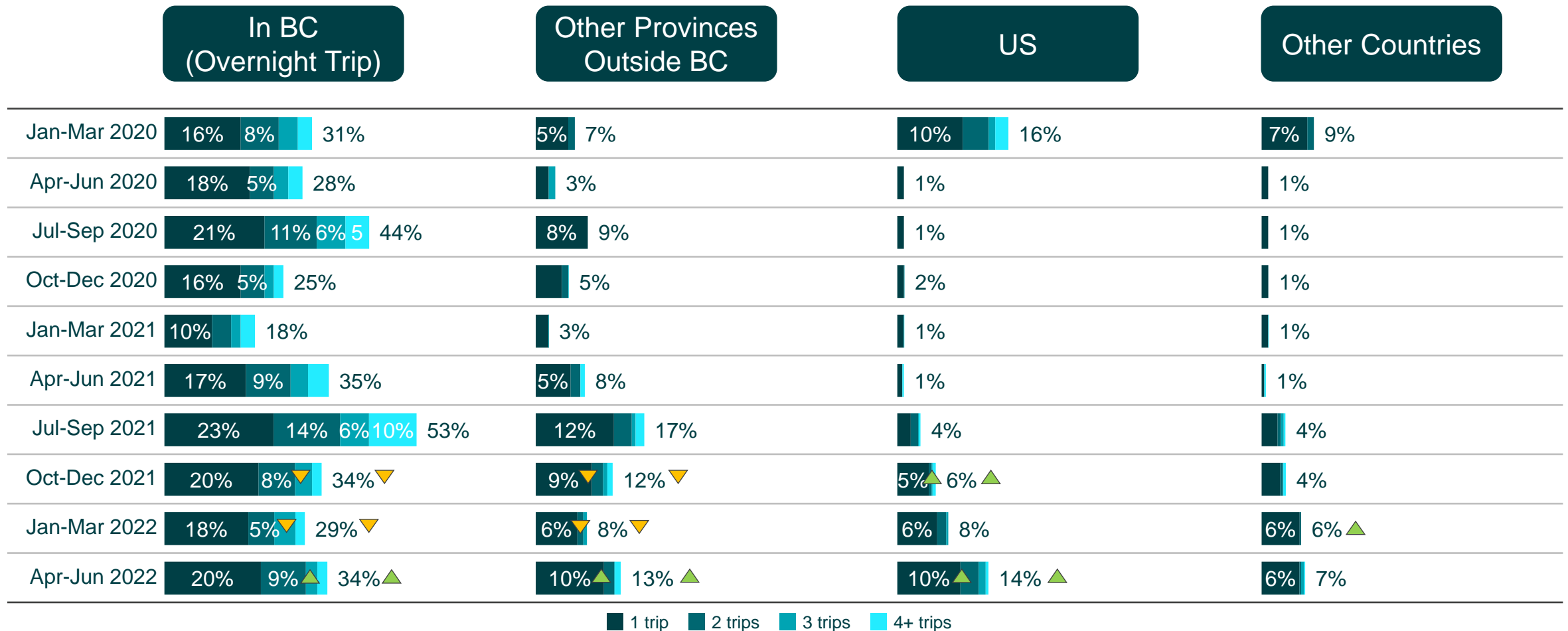
- Comfort with all activities has levelled off, with only directional increases or dips. The only activity that has significantly dropped in comfort is non-essential retailers, decreasing -3 points in July.
- Comfort levels with accommodations (hotel/motel, sharing economy accommodations) continue to rise directionally to new historical highs.

## REASONS FOR NOT TAKING AN OVERNIGHT TRIP IN BC (SLIDE 22)

- The top two reasons for not taking an overnight trip in BC in the next three months are cost-related: four in ten (41%) say transportation/gas costs and over one-third (35%) are dealing with financial challenges, up +13 points from the last time this question was asked in March 2022. The risk of being exposed to/getting COVID-19 continues to decline as a reason not to take a trip, dropping -12 points from March to 26% in July, while 18% select travel disruptions as a reason.

# 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.

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.

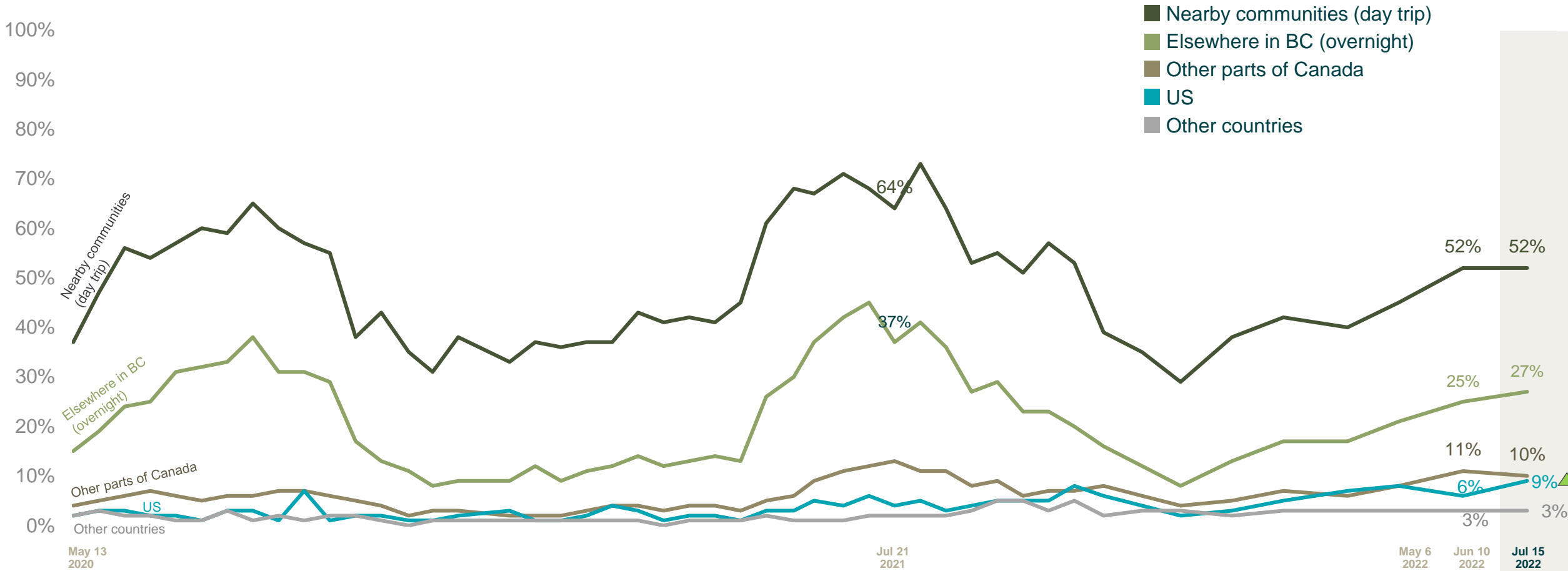
▲ Statistically significantly **higher** than previous wave.  
▼ Statistically significantly **lower** than previous wave.

# TRAVEL INTENT



# Tracking British Columbians' Travel Intent Within Next 4 Weeks

(By Destination)

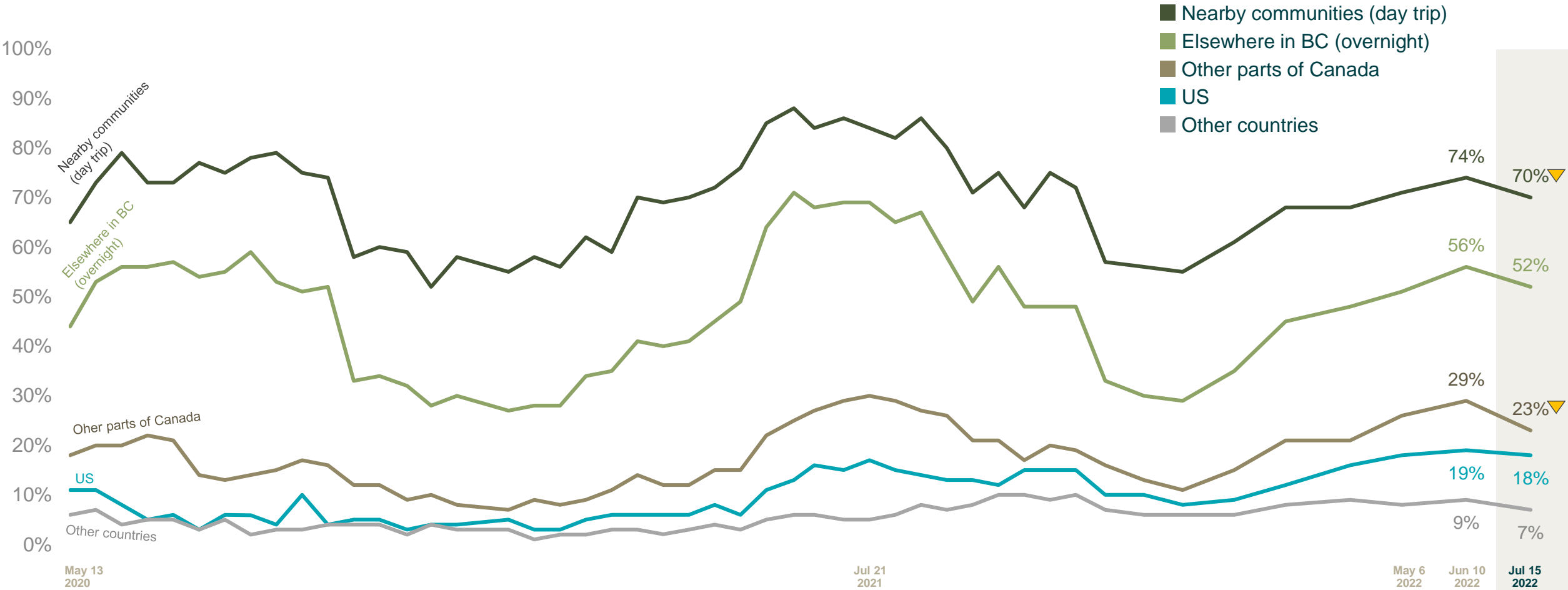


NOTE: Response category “only when vaccine or treatment for COVID-19 available” removed Jun 23, 2021.  
Base: All respondents  
D3. When, if at all, are you likely to make trips to the following destinations?

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

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

(By Destination)

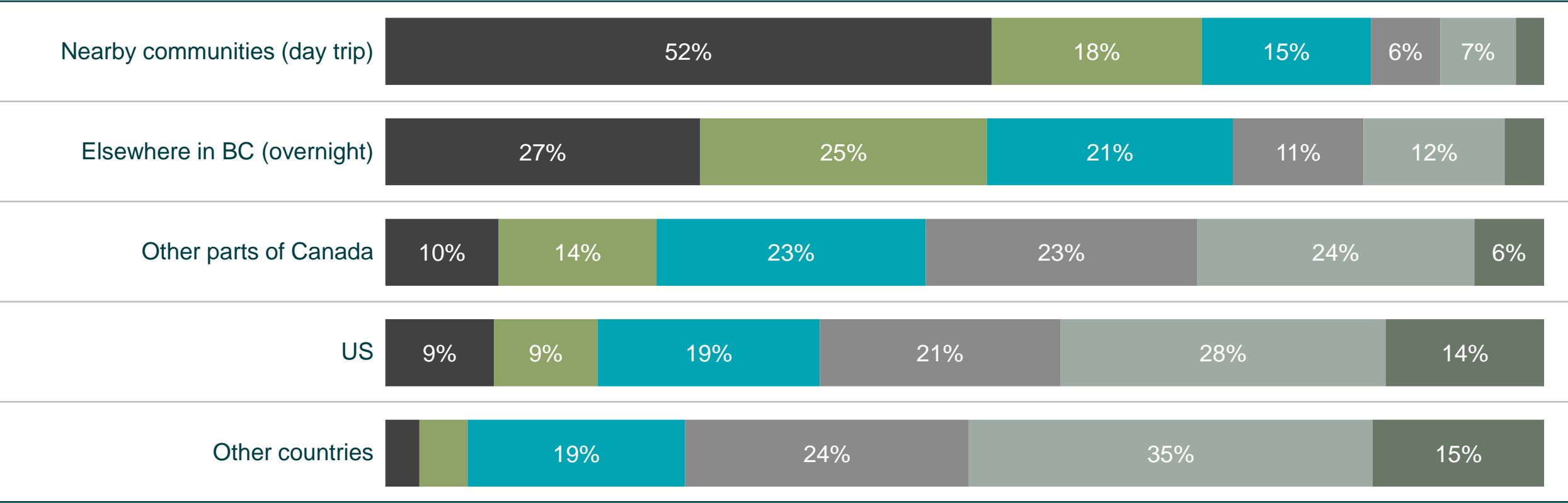


NOTE: Response category "only when vaccine or treatment for COVID-19 available" removed Jun 23, 2021.  
 Base: All respondents  
 D3. When, if at all, are you likely to make trips to the following destinations?  
 Due to rounding, the total may not equal 100% to the sum of individual values shown.

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

# Snapshot Of British Columbians' Travel Intentions

(Wave 48 – July 15, 2022)



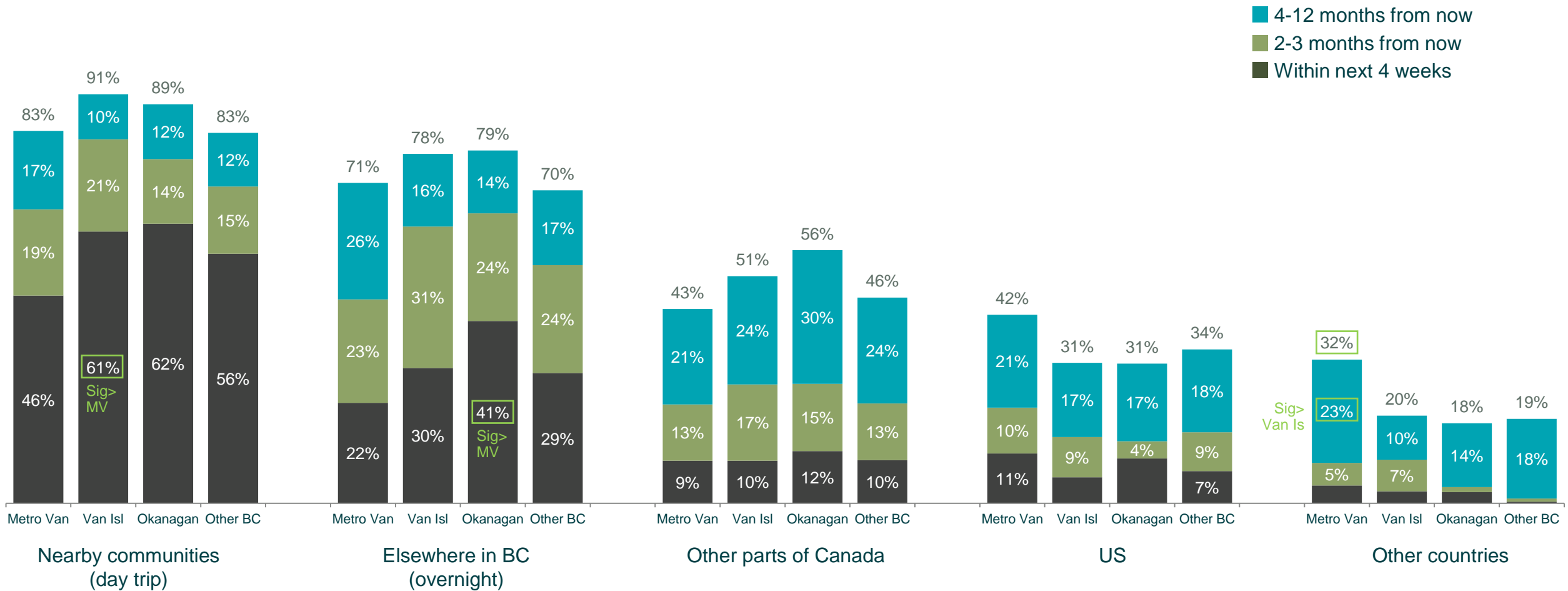
■ Within next 4 weeks ■ 2-3 months from now ■ 4-12 months from now ■ Within 2 years ■ Not sure, but longer than 2 years ■ Never

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 48 – July 15, 2022)



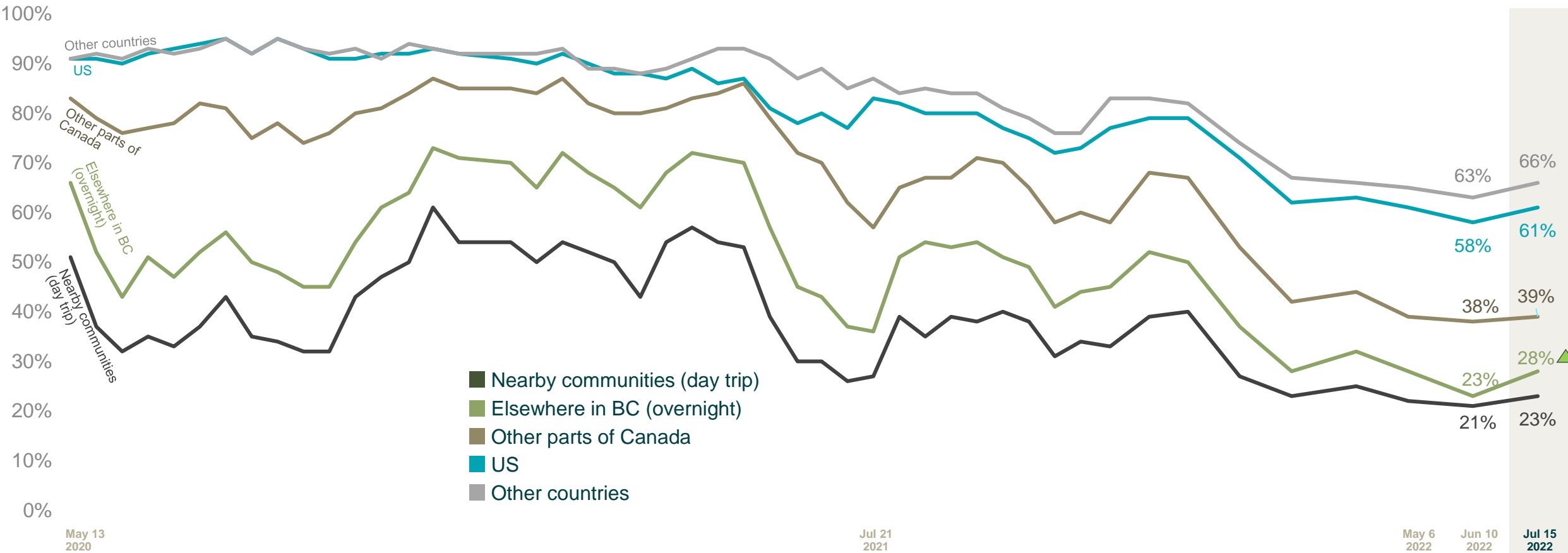
Base: All respondents  
D3. When, if at all, are you likely to make trips to the following destinations?  
Due to rounding, the sum of the individual values shown may not add up to the total shown.

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)



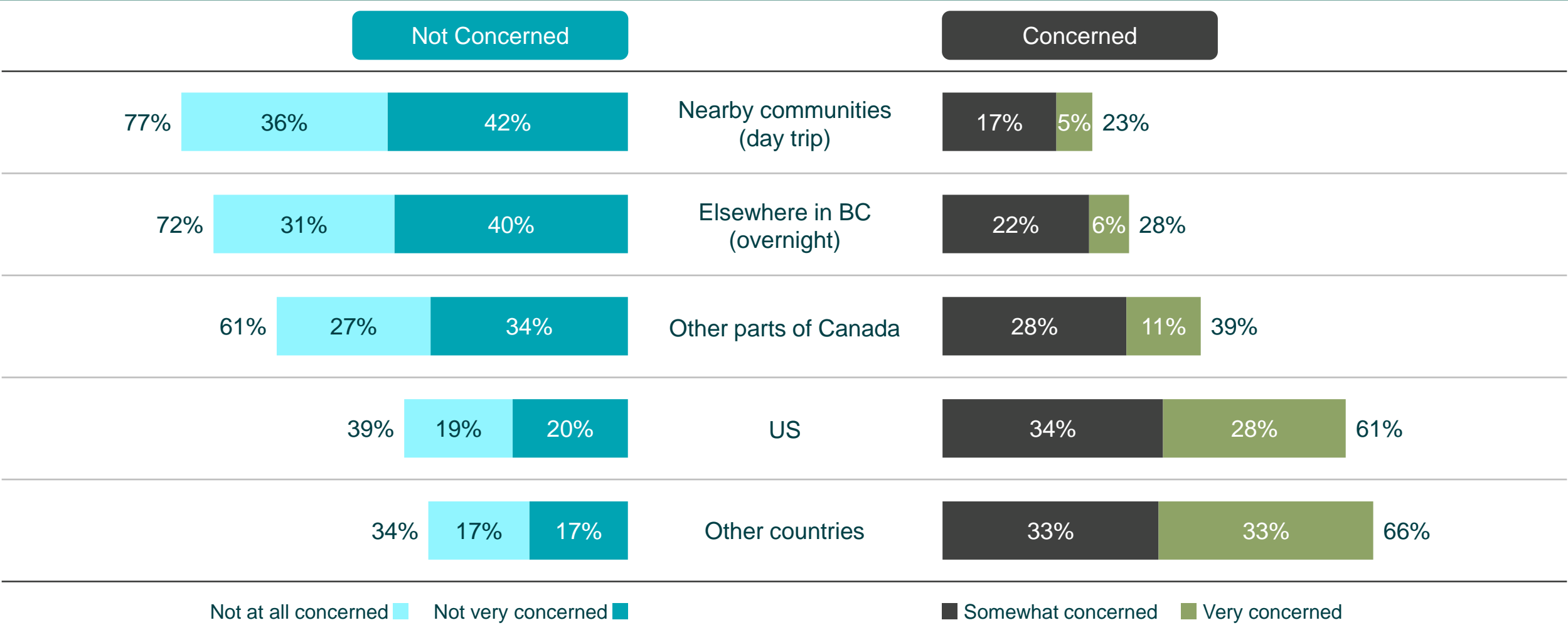
Base: All respondents  
D2. Given the current situation with COVID-19, how concerned would you be with the following types of visitors making non-essential trips into your community over the next few weeks?

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



# Snapshot Of British Columbians' Concern Welcoming Visitors

(Wave 48 – July 15, 2022)

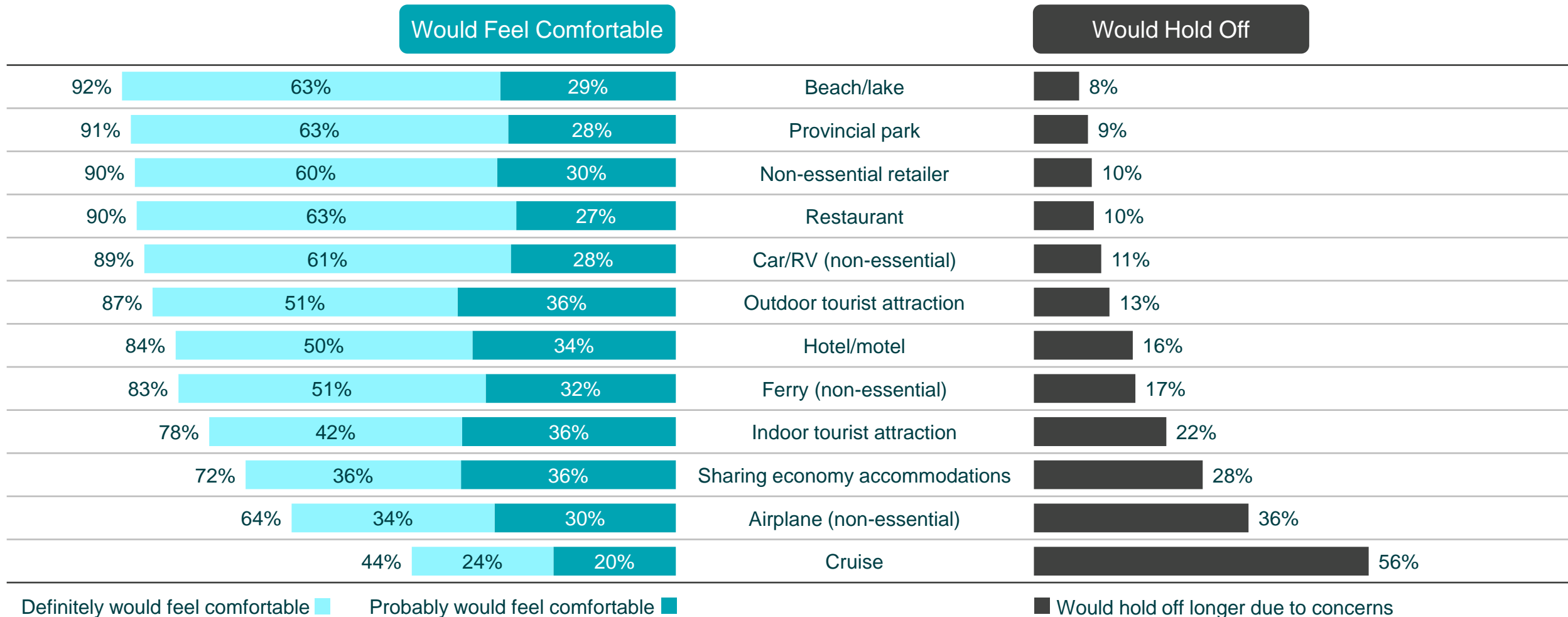


Base: All respondents  
D2. Given the current situation with COVID-19, how concerned would you be with the following types of visitors making non-essential trips into your community over the next few weeks?  
Due to rounding, the sum of the individual values shown may not add up to the total shown.

# COMFORT LEVELS BY ACTIVITY / TRANSPORTATION / ACCOMMODATION

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

(Wave 48 – July 15, 2022)

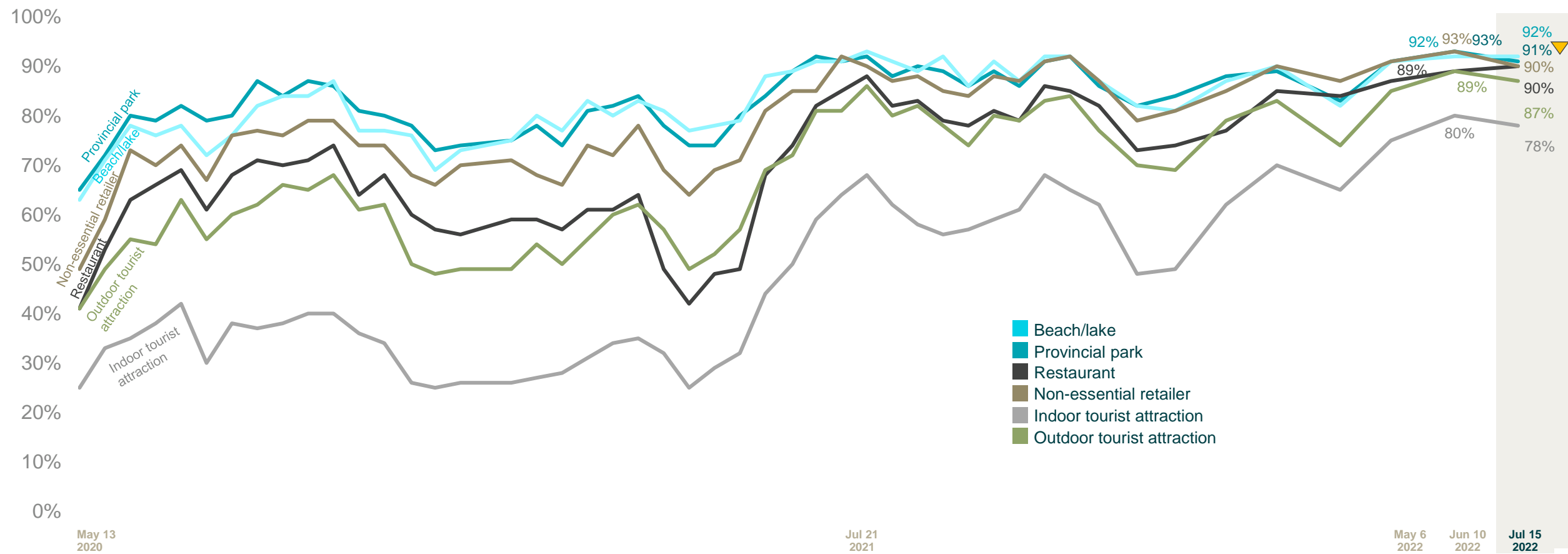


Base: All respondents, excluding not applicable/don't do this in general and not applicable/wouldn't do this at this time of year  
 D1. Would you be comfortable doing/using each of the following in the next few weeks, or are you be likely to hold off longer due to concerns about COVID-19?  
 Due to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

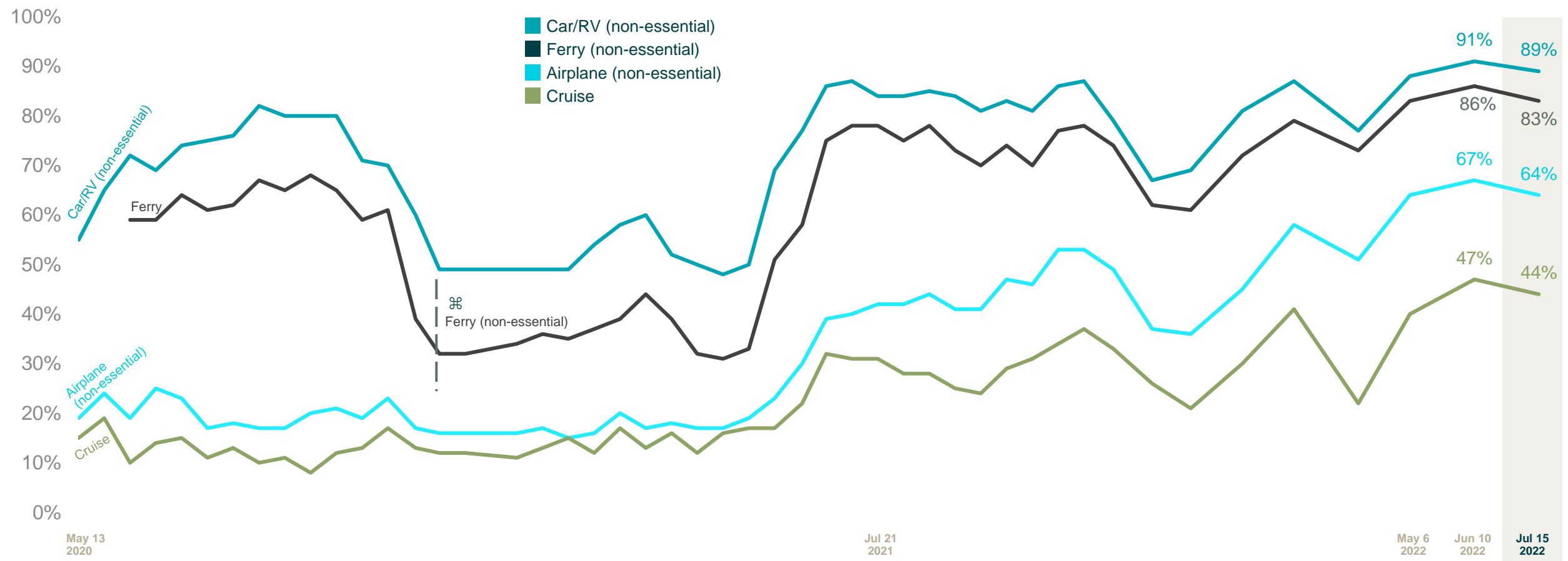


Base: All respondents, excluding not applicable/don't do this in general and not applicable/wouldn't do this at this time of year  
D1. Would you be comfortable doing/using each of the following in the next few weeks, or are you be likely to hold off longer due to concerns about COVID-19?

▲ 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?

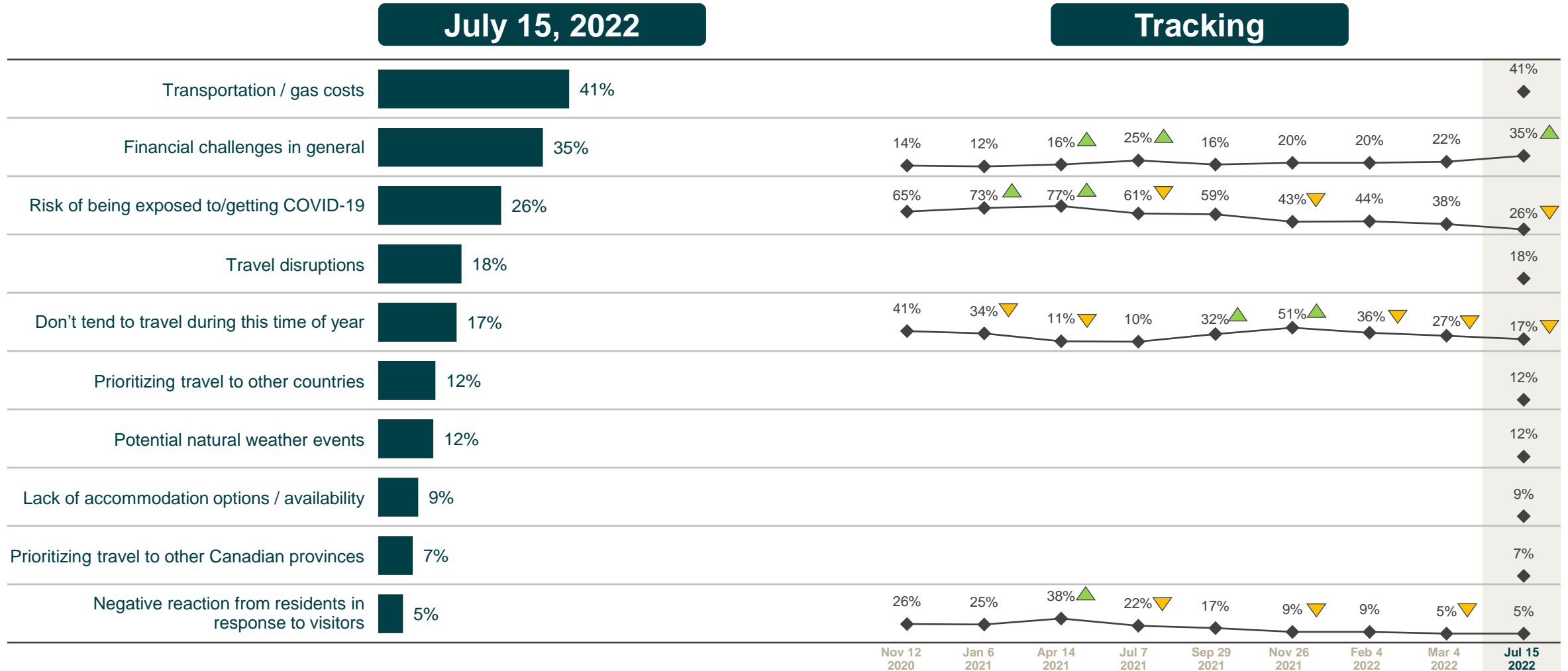
▲ Statistically significantly **higher** than previous wave.  
▼ Statistically significantly **lower** than previous wave.

# CURRENT 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)



Base: Those who are not likely to take an overnight trip in BC in the next 3 months. (n=464)  
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.

# APPENDIX: METRICS BY DEMOGRAPHICS

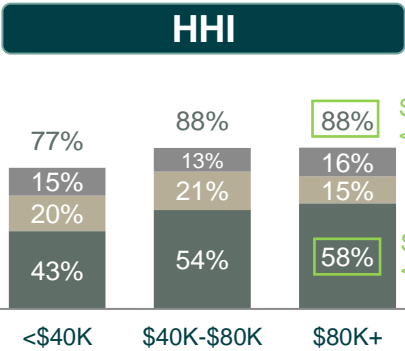
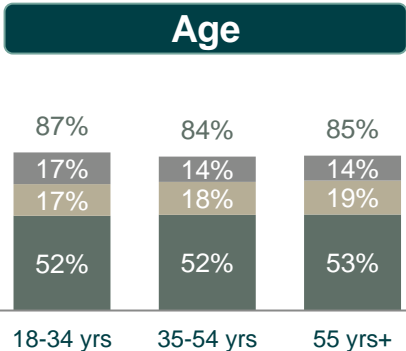
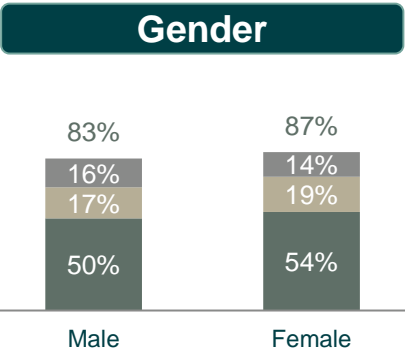
# Snapshot Of British Columbians' Travel Intent By Demographics

(Wave 48 – July 15, 2022)

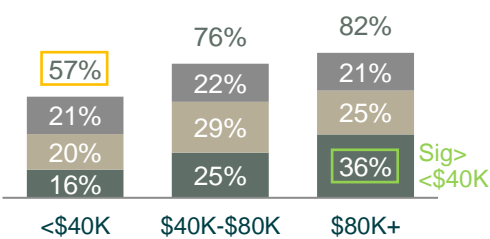
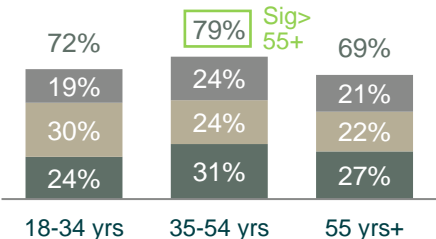
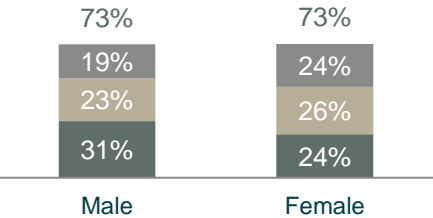


- 4-12 months from now
- 2-3 months from now
- With next 4 weeks

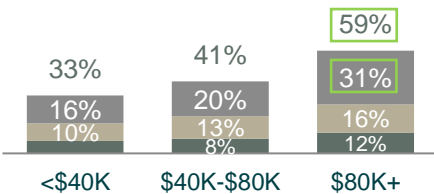
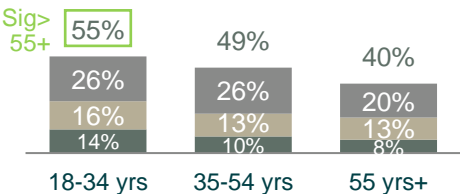
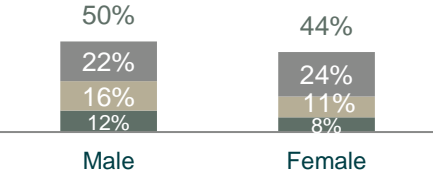
Nearby communities  
(day trip)



Elsewhere in BC  
(overnight)



Other  
parts of Canada

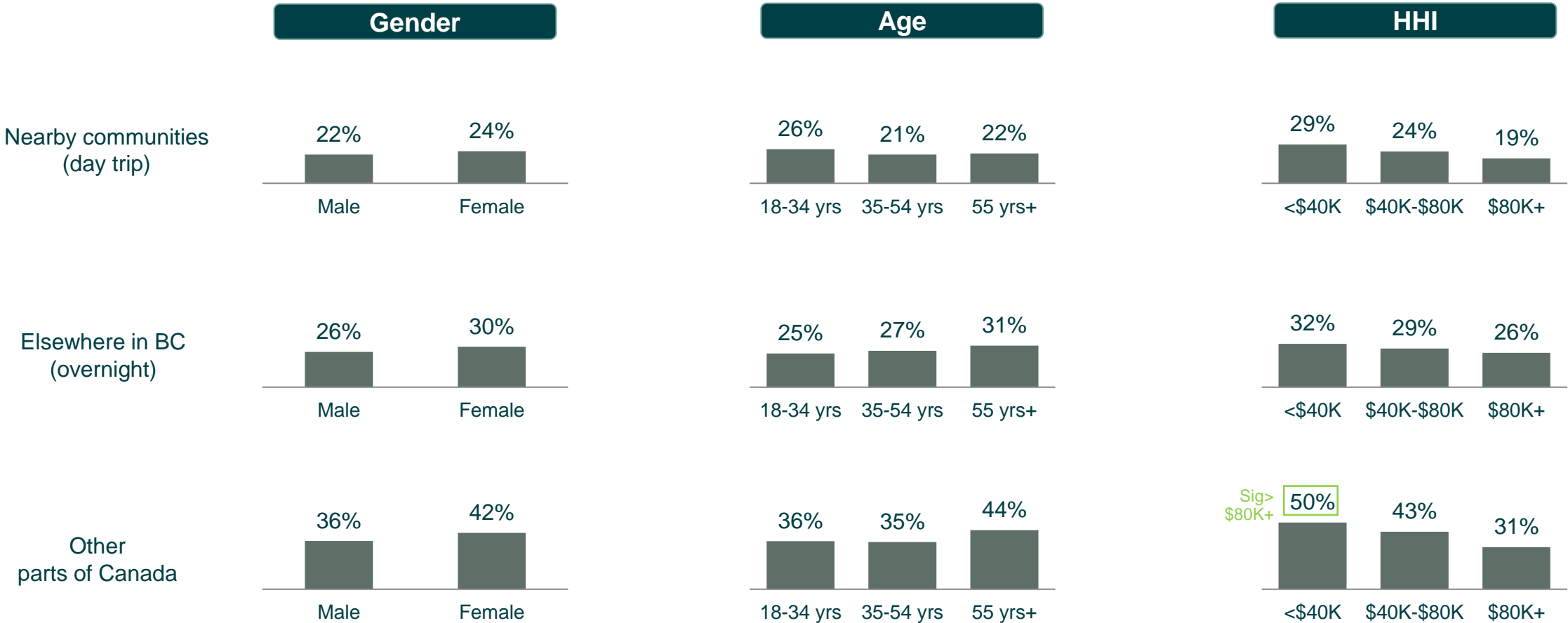


Base: All respondents  
D3. When, if at all, are you likely to make trips to the following destinations?  
Due to rounding, the total may not equal 100% to the sum of individual values shown.

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 48 – July 15, 2022)

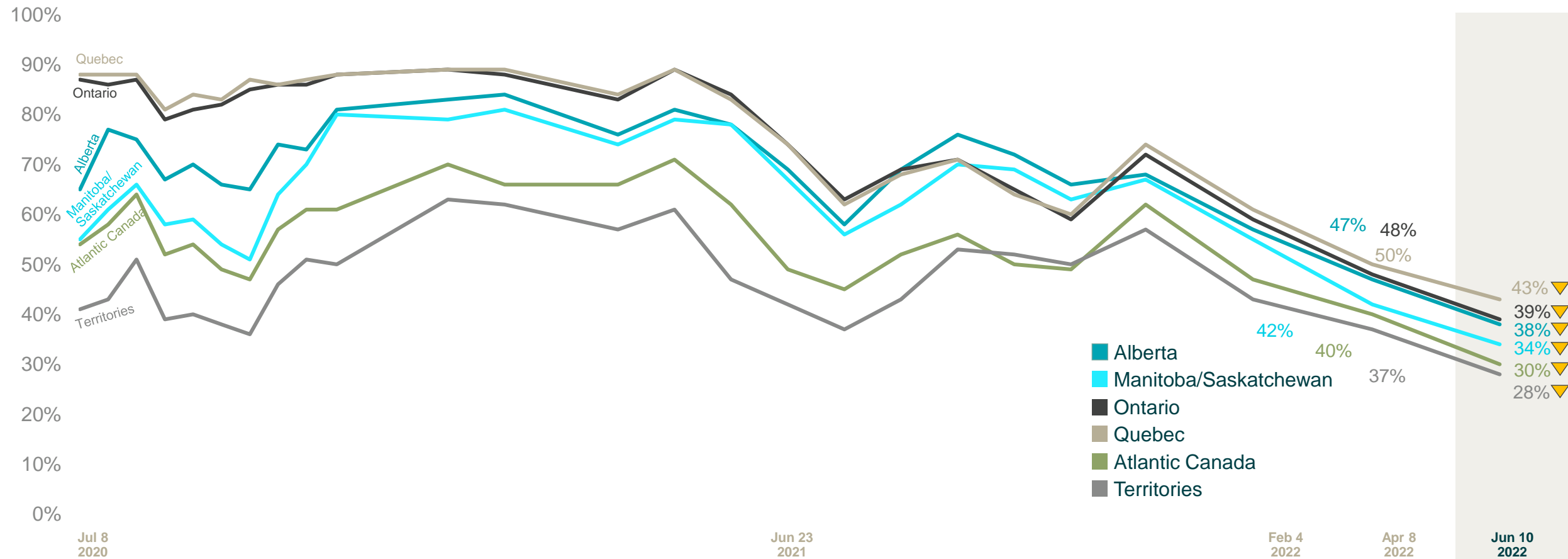


# APPENDIX: PAST AD-HOC FINDINGS



# Tracking British Columbians' Concern Welcoming Canadian Visitors

(Total Very/Somewhat Concerned By Origin)

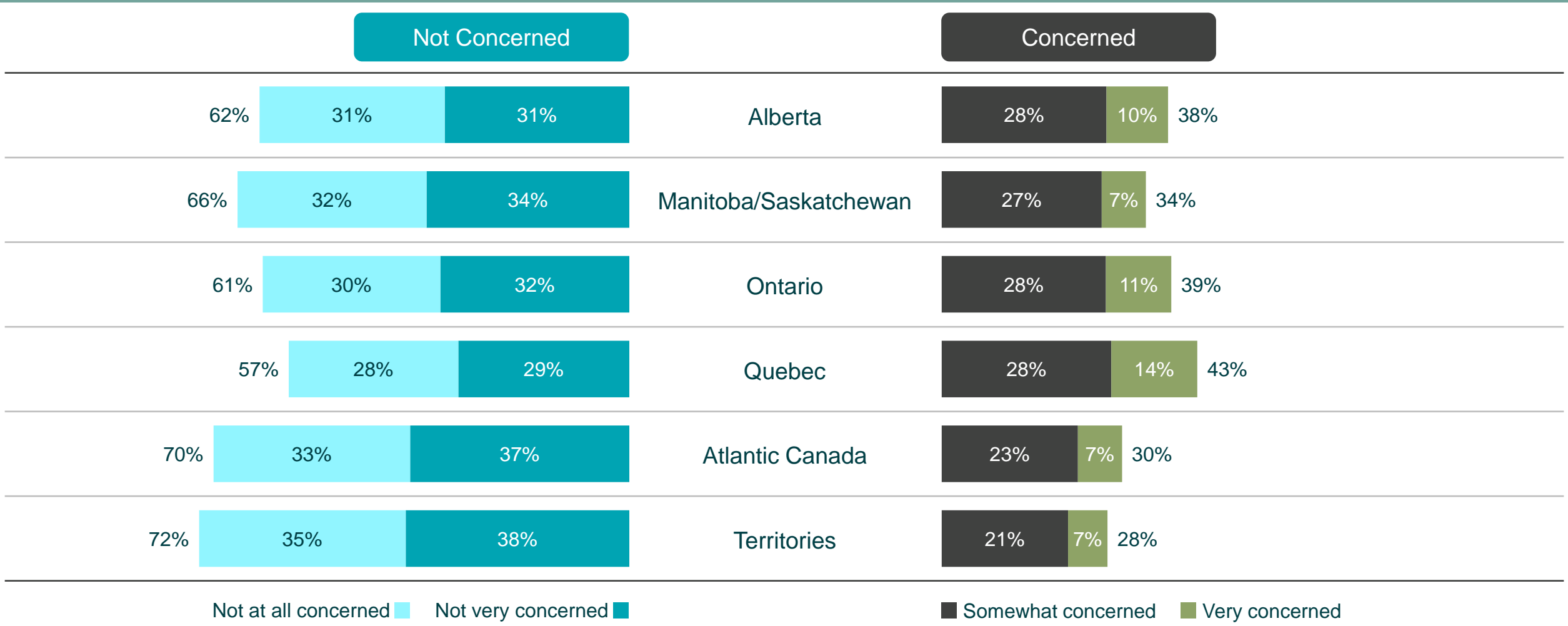


⌘ Question frequency changed from bi-weekly to monthly starting November 12, 2020.  
Base: All respondents  
D2a. And how concerned would you be with the following types of Canadian visitors making non-essential trips into your community over the next few weeks?

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

# Snapshot Of British Columbians' Concern Welcoming Canadian Visitors

(Wave 48 – July 15, 2022)



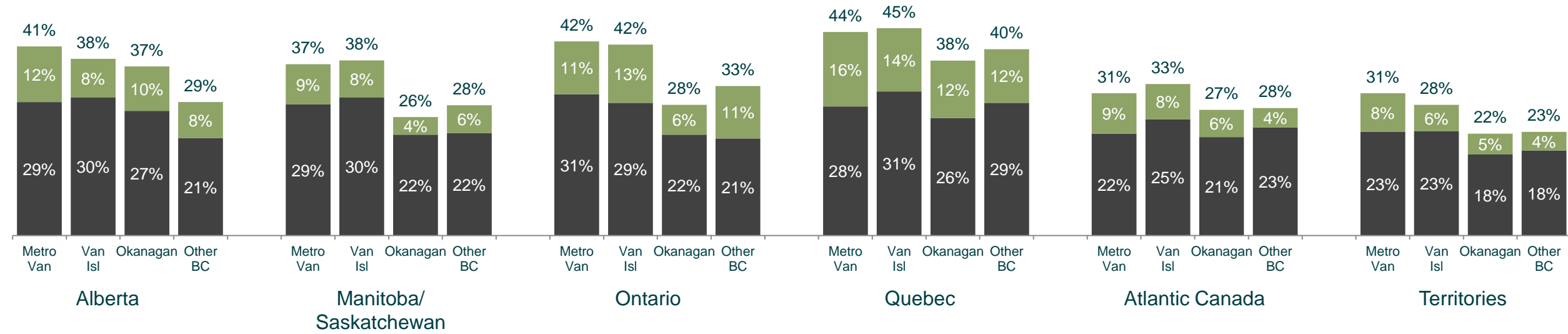
Base: All respondents  
D2a. And how concerned would you be with the following types of Canadian visitors making non-essential trips into your community over the next few weeks?  
Due to rounding, the sum of the individual values shown may not add up to the total shown.

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

(Wave 48 – July 15, 2022)



Very concerned  
Somewhat concerned

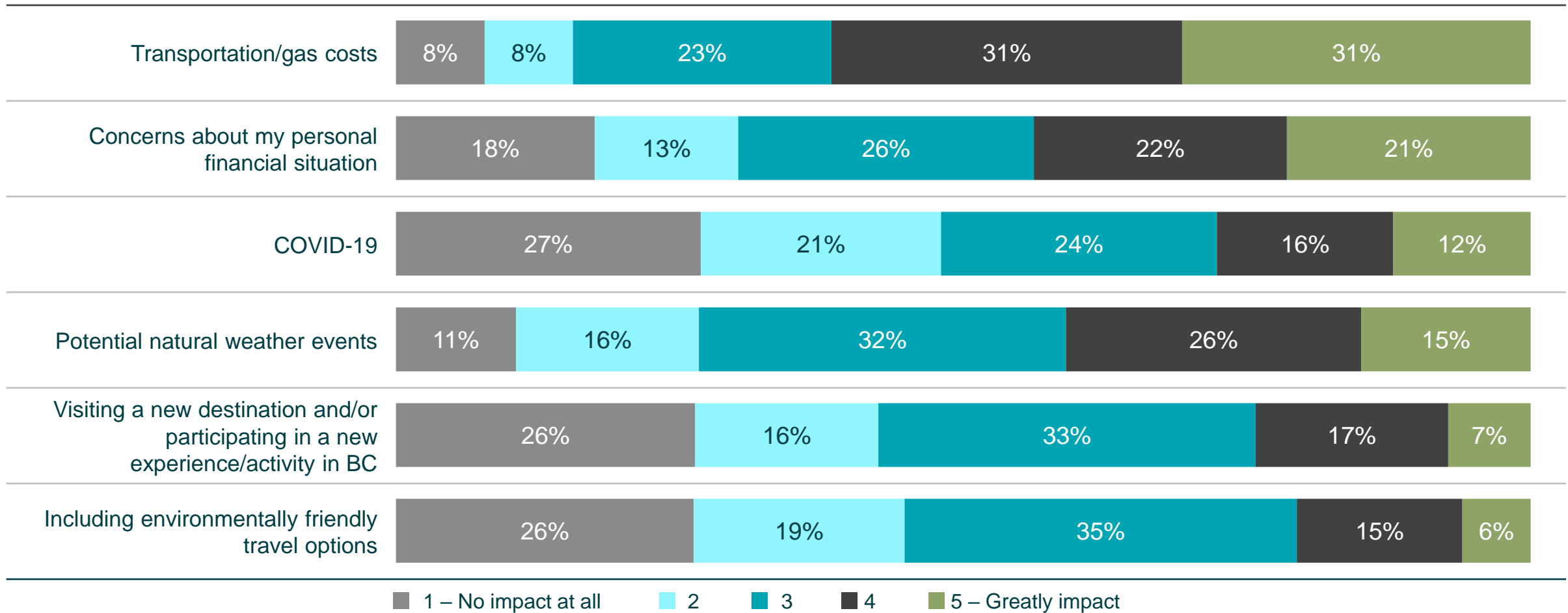


Base: All respondents  
D2a. And how concerned would you be with the following types of Canadian visitors making non-essential trips into your community over the next few weeks?  
Due to rounding, the sum of the individual values shown may not add up to the total shown.

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

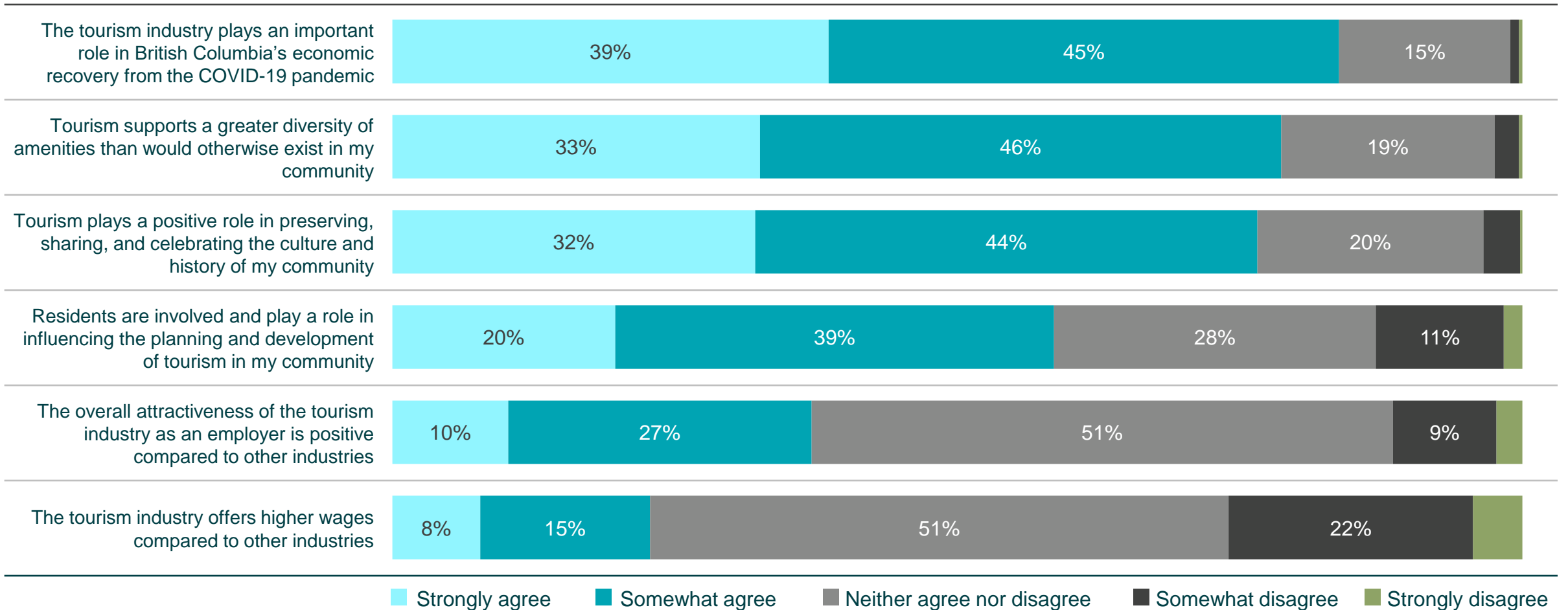
# Impact of Factors on Overnight Travel in BC this Summer

(Wave 47 – June 10, 2022)



# Importance of Tourism

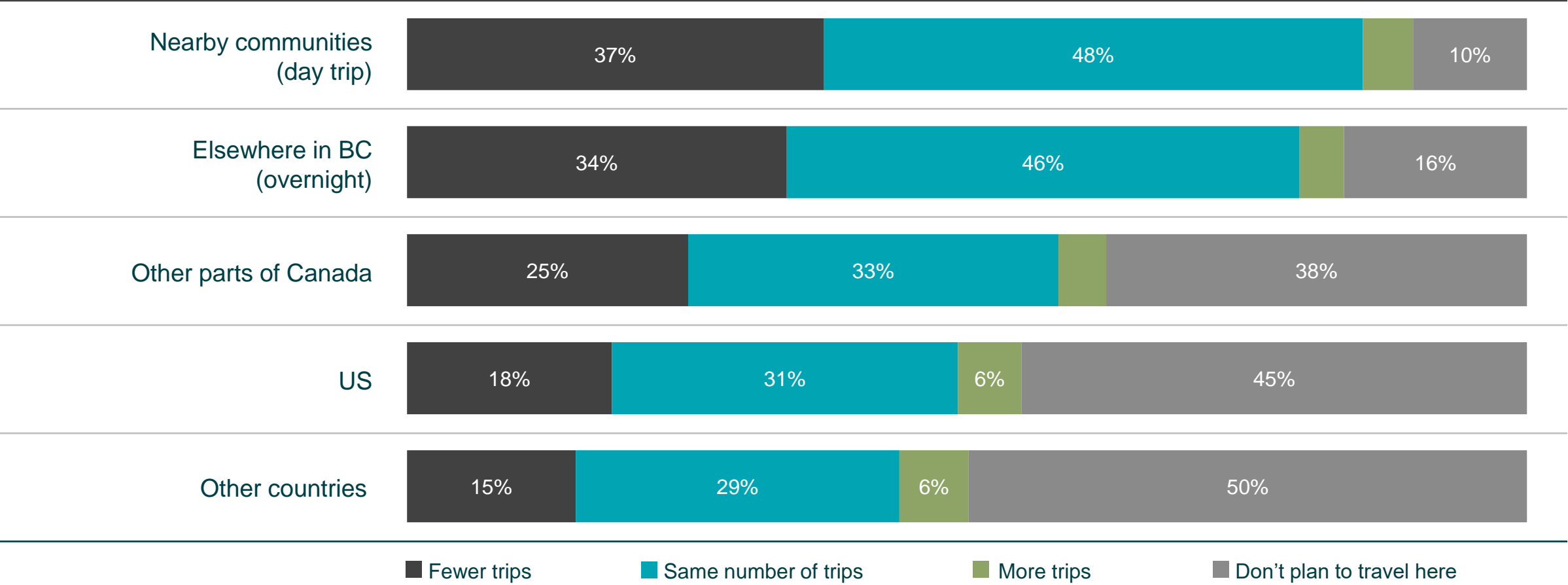
(Wave 45 – Apr 8, 2022)





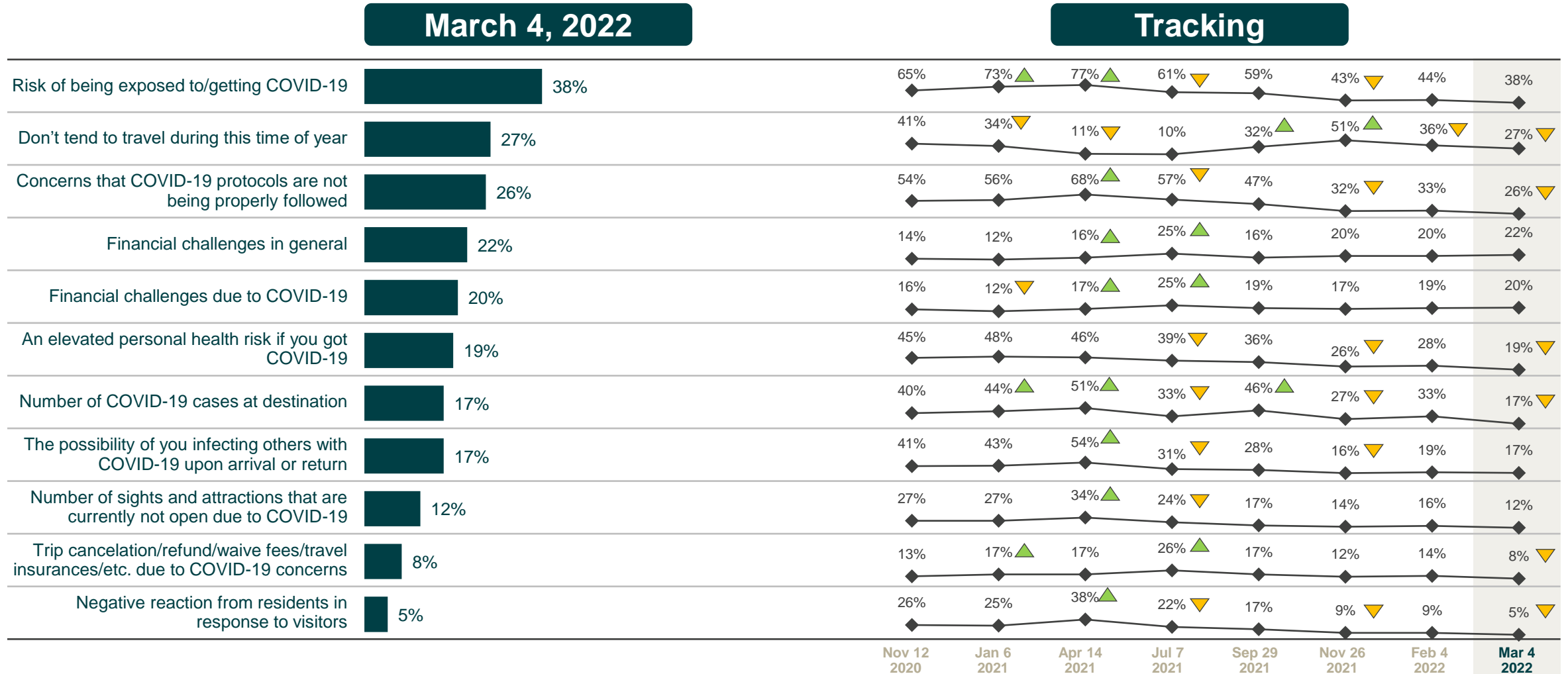
# Impact of Gas Prices on Spring/Summer Travel Intentions

(Wave 45 – Apr 8, 2022)



# Reasons For Not Considering Future BC Travel (Aided)

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



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?

# Attitudes Towards Tourism Post-COVID-19

(Wave 44 - March 4, 2022)



## % of Agreement

I hope there is a similar amount of tourism to my community than there was prior to the pandemic 43%

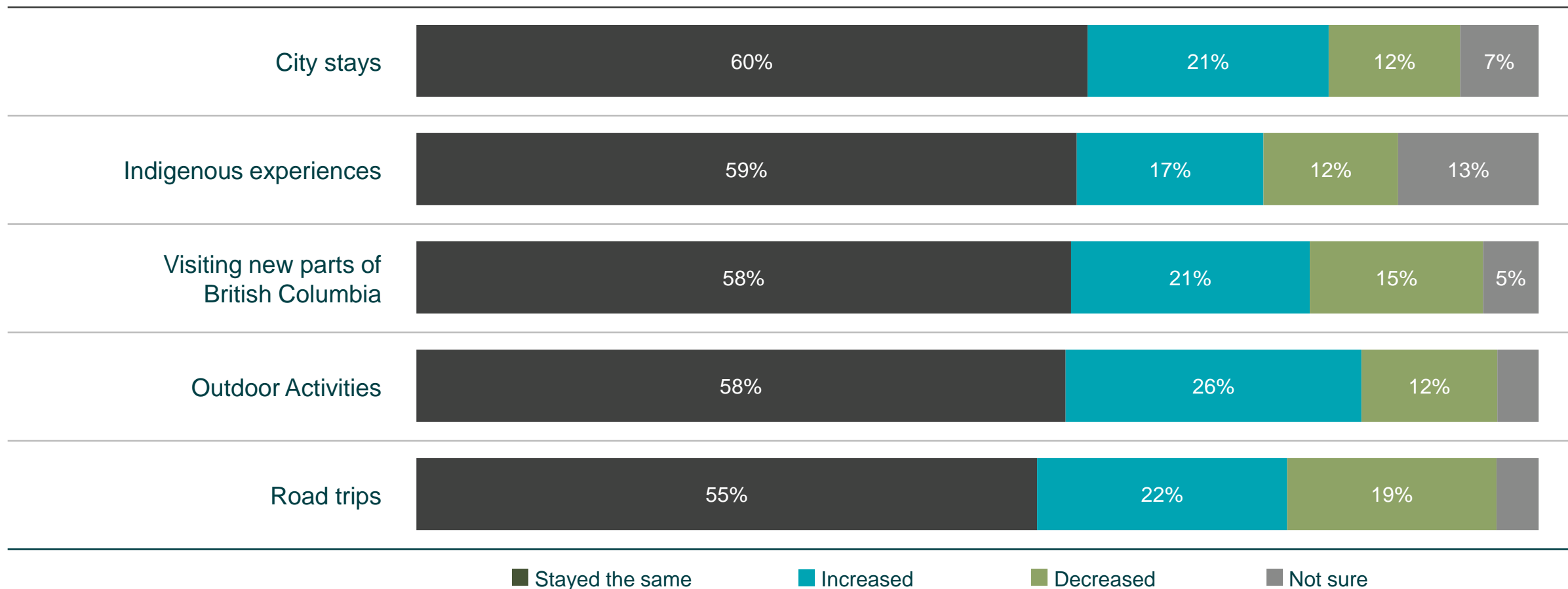
I hope there is more tourism to my community than there was prior to the pandemic 22%

I hope there is less tourism to my community than there was prior to the pandemic 16%

Not sure 19%

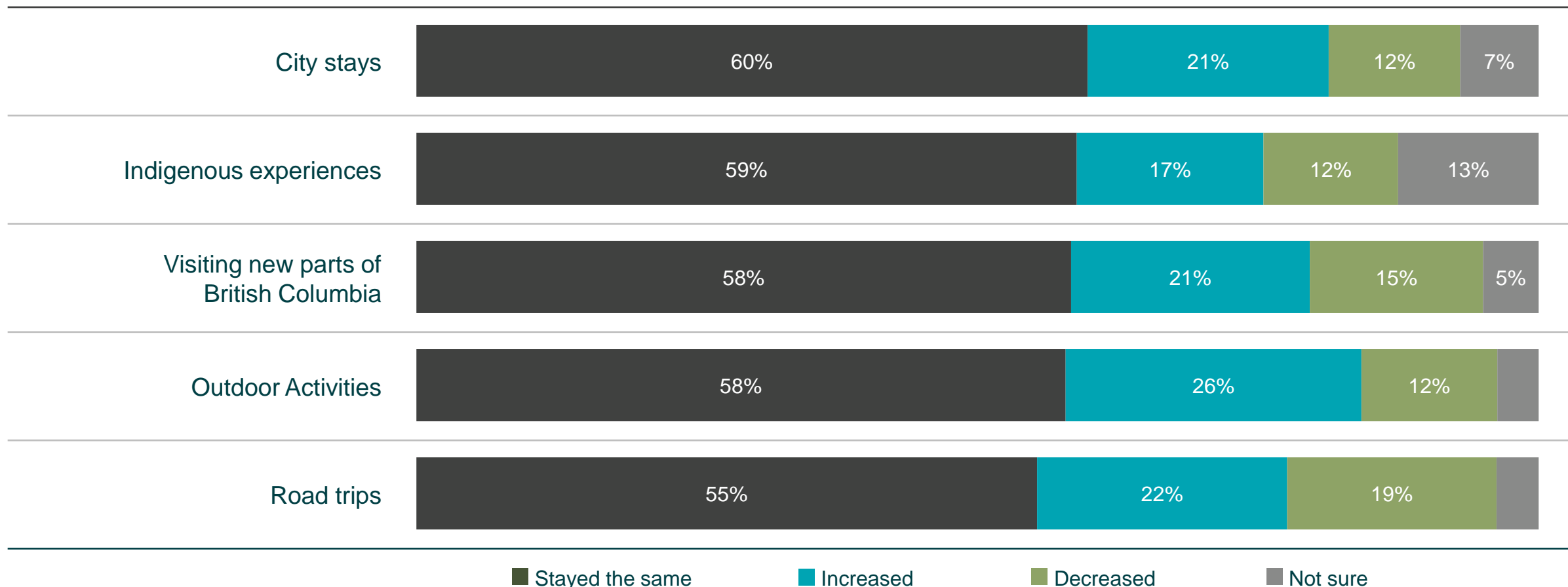
# Interest in BC Activities/Experiences Compared to Two Years Ago

(Wave 44 – Mar 4, 2022)



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

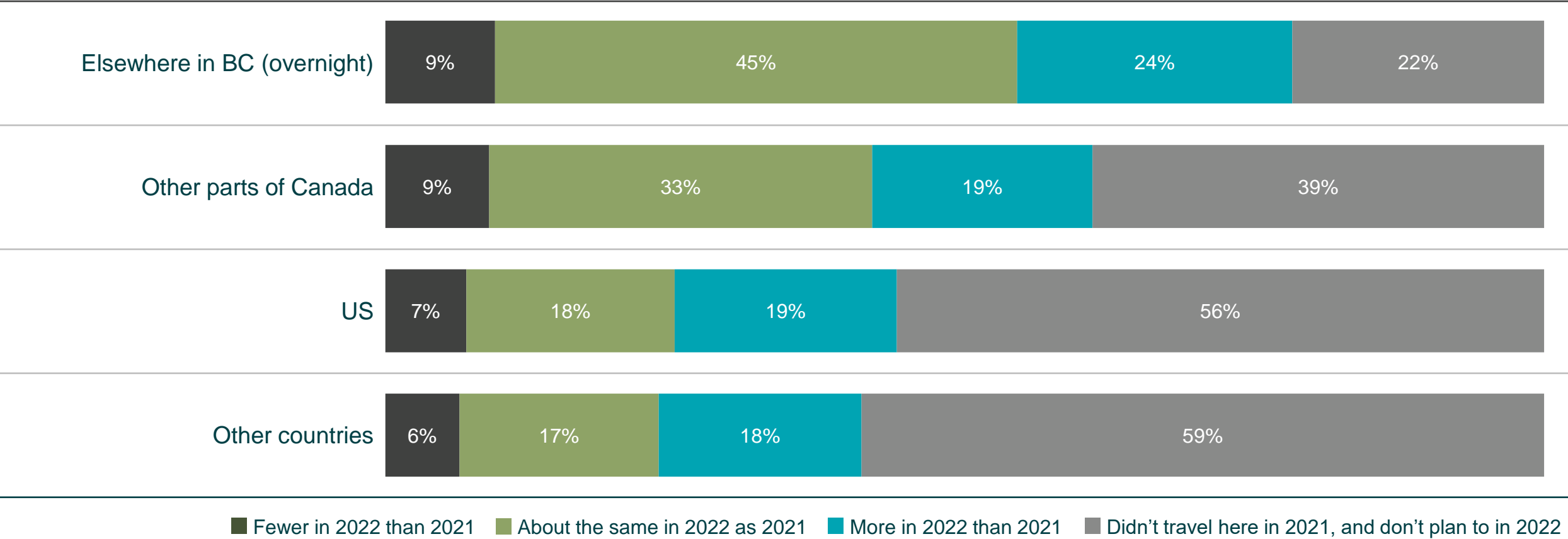
(Wave 44 – Mar 4, 2022)





# Likely 2022 Travel Compared to 2021

(Wave 41 – Jan 7, 2022)

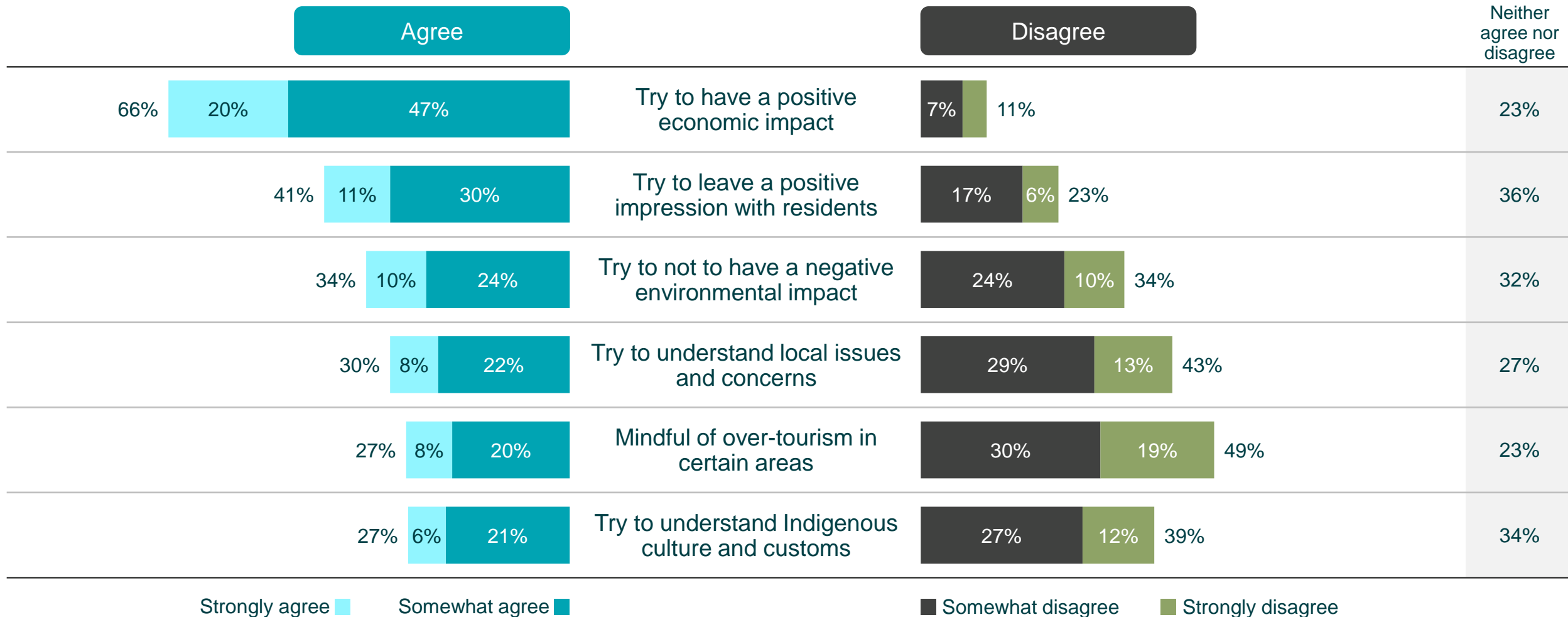


Base: All respondents  
D14. Compared to last year (2021), how much do you plan to travel this year (2022) to each of the following to destinations for leisure and/or visiting friends and family? (Please do not consider any trips for businesses purposes).

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

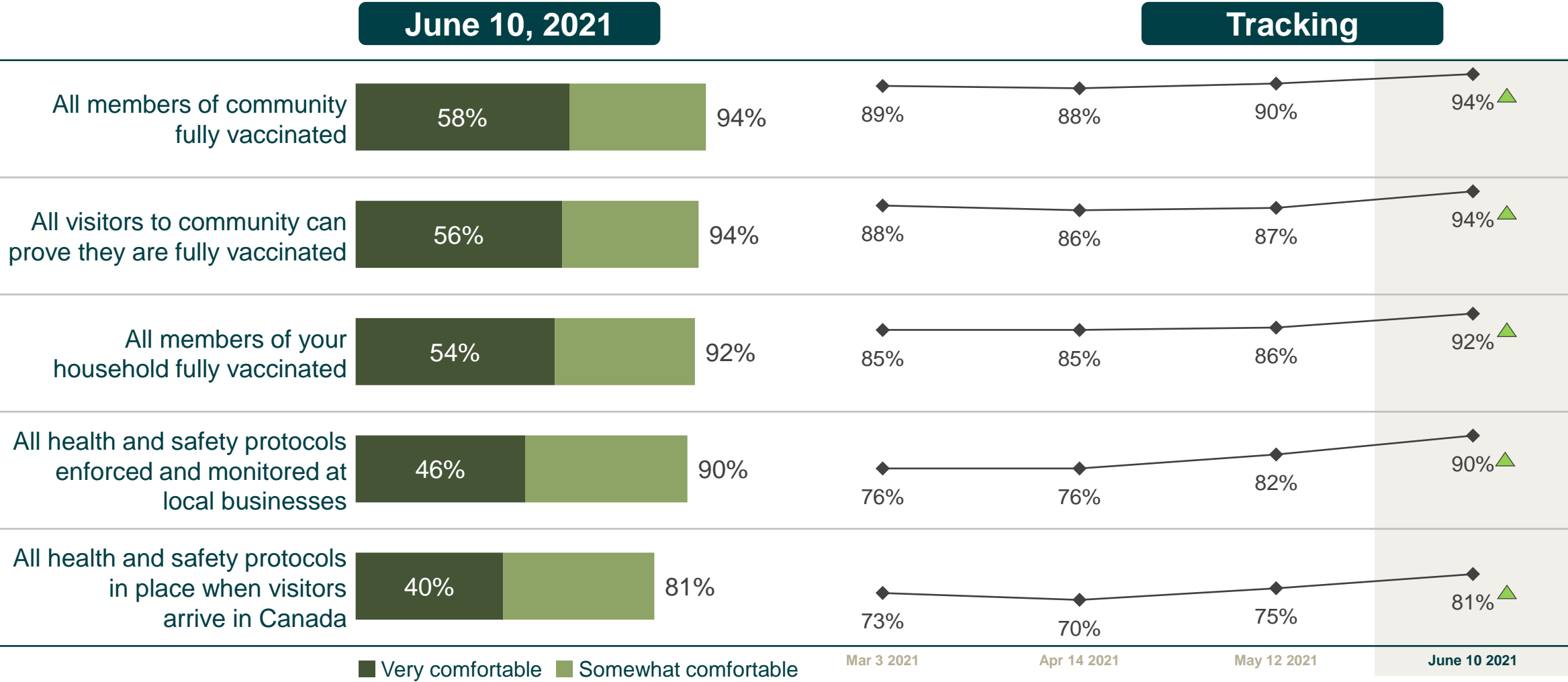
# British Columbians' Views On Visitors

(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

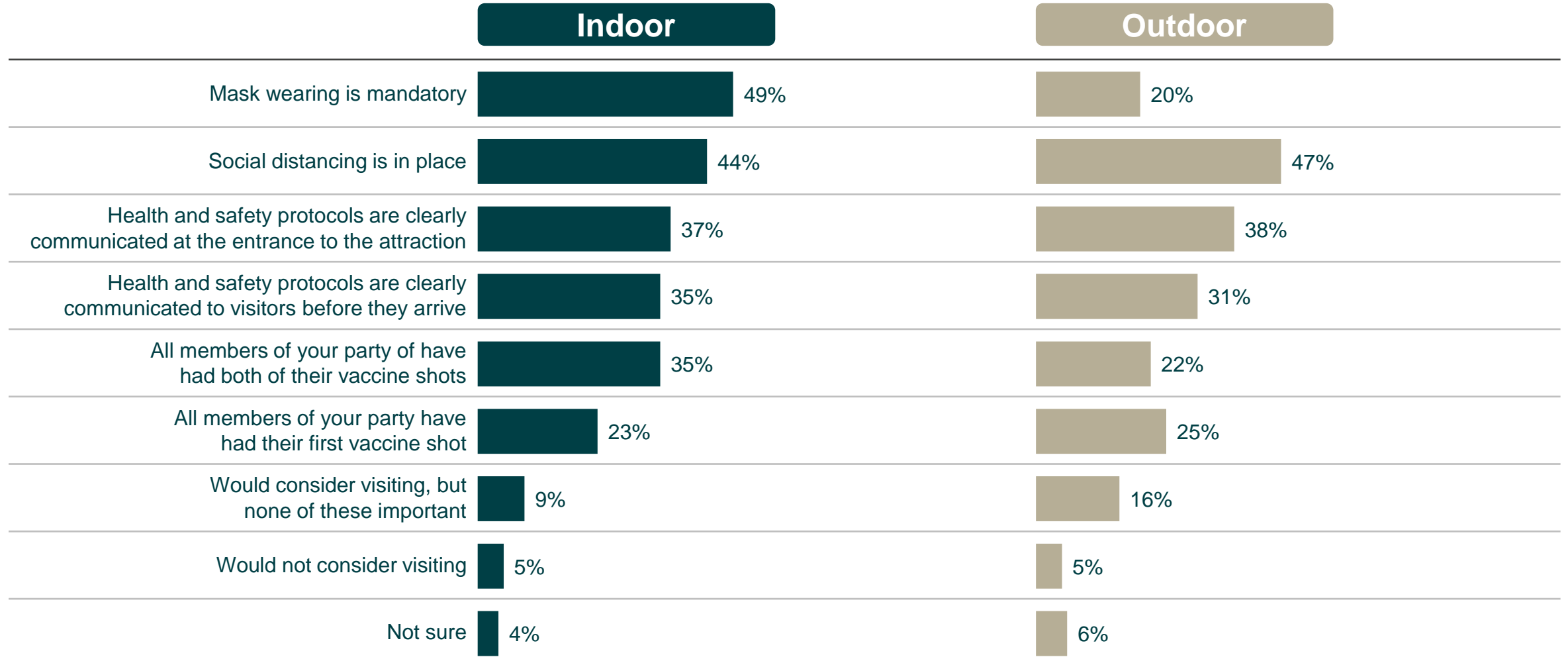


Base: All respondents  
D5. How comfortable would you be with visitors making non-essential trips into your community under each of the following circumstances?

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

# Important Circumstances In Visiting BC Attractions (Aided)

(Wave 29 – June 23, 2021)

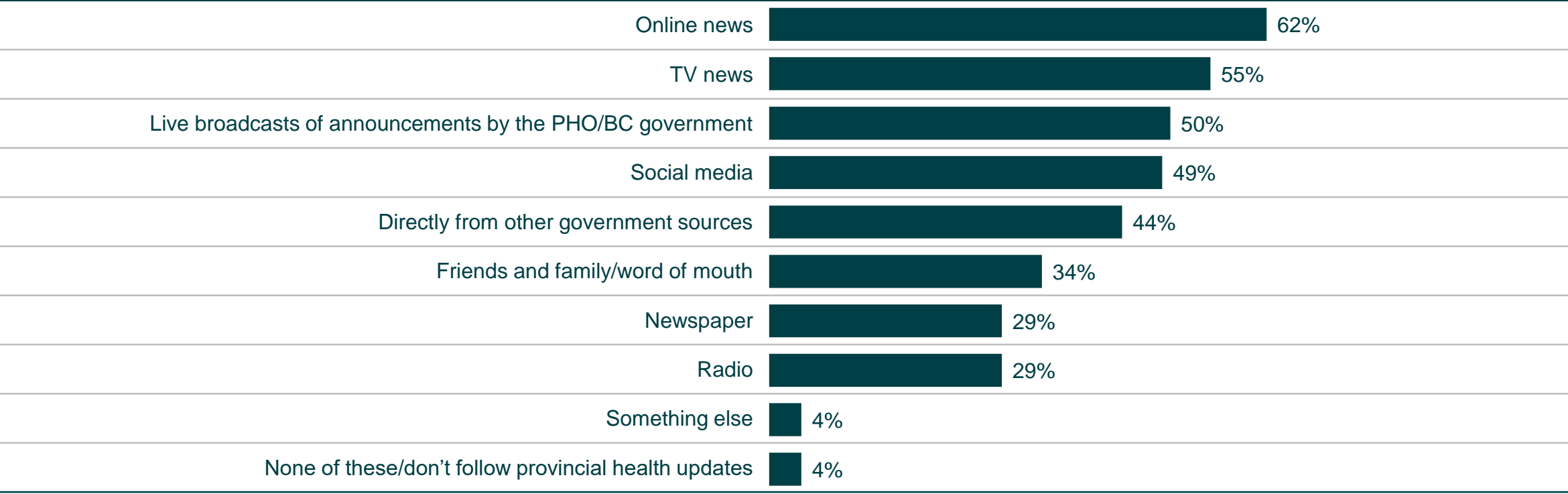


# Source Of Provincial COVID-19 Health Updates

(Wave 21 - March 3, 2021)

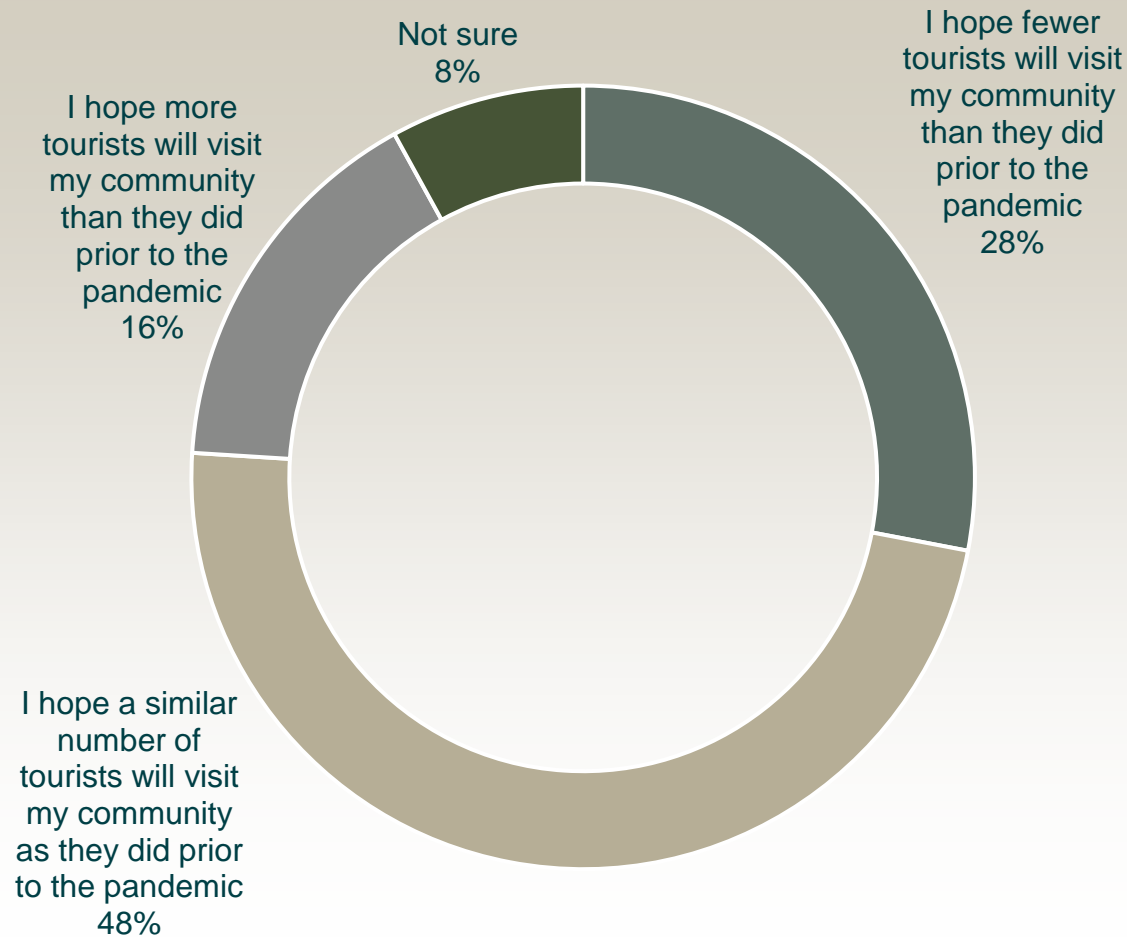


March 3, 2021  
(n=827)



# 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%

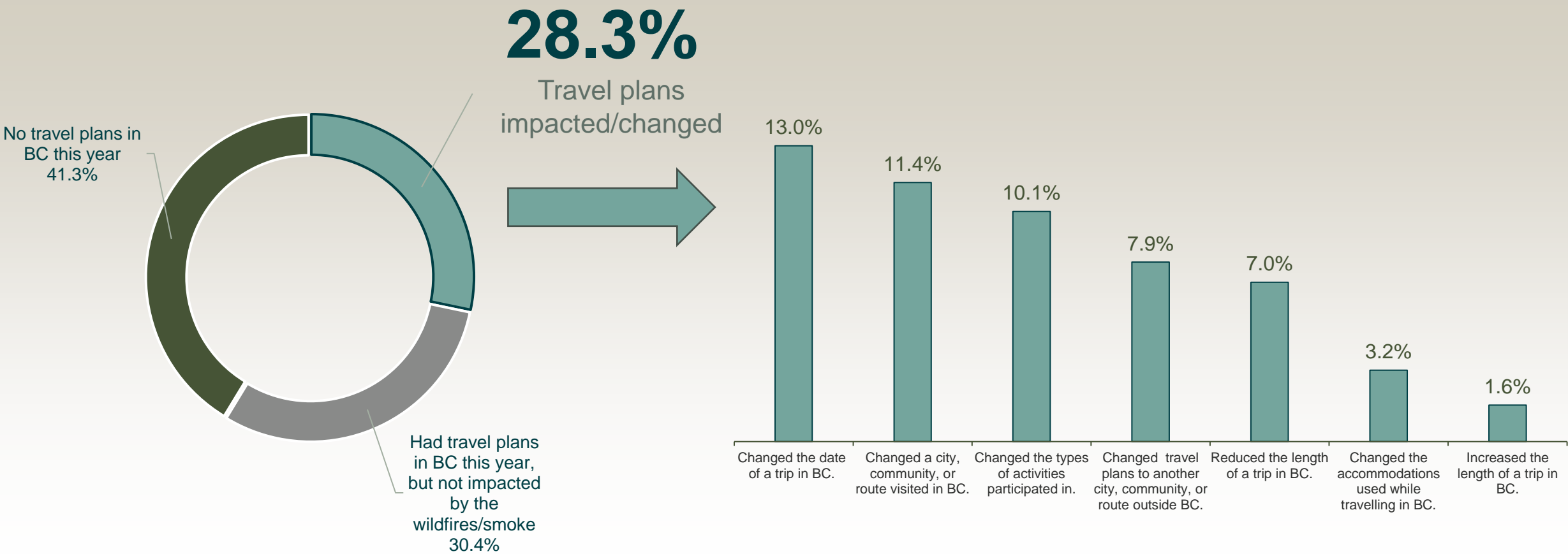
Statistically significantly **higher** than comparison group(s).

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



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

(Wave 34 – Sept 1, 2021)



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:**

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