

BC Residents' Public Perceptions:  
COVID-19 Travel and Tourism  
Wave 45: April 8, 2022

Report prepared by: Leger



# Table of Contents

<b>BACKGROUND AND METHODOLOGY</b>	<b>3</b>
<b>KEY HIGHLIGHTS</b>	<b>4</b>
<b>DETAILED FINDINGS</b>	<b>6</b>
Past Travel	6
Travel Intent	8
Concern Welcoming Visitors	13
Comfort Levels by Activity/Transportation/Accommodation	16
Current Ad-Hoc Findings	21
<b>APPENDIX: METRICS BY DEMOGRAPHICS</b>	<b>27</b>
<b>APPENDIX: PAST AD-HOC FINDINGS</b>	<b>30</b>



## 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	Aug19-23, 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%
<b>45</b>	<b>Apr 8-10, 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 January-March 2022 time period tends to be naturally lower than the prior three months, which includes the holiday season. However, relative to the same time last year, travel to all destinations was significantly stronger. Compared to January-March 2021, overnight BC trips were up +11 points to 29%, trips to other provinces were up +5 points to 8%, trips to the US were up +7 points to 8%, and trips to other countries were up +5 points to 6%.

## TRAVEL INTENTIONS (SLIDES 8-12)

- Short term (next 4 weeks) travel intentions within BC levelled off this wave for all destinations. Medium term (2-3 months from now) travel intentions have also remained flat, except for potential US travel, which jumped significantly (up +4 points).
  - The proportion of BC residents planning to travel within the province in the next year also remains stable, with 86% intending to take day trips and 77% likely to make overnight trips.

## CONCERN WELCOMING VISITORS (SLIDES 13-15)

- BC residents' concern welcoming visitors remains level, with similar results to the March wave. Compared to this same period last year, BC residents' concern welcoming visitors from all areas has decreased between -25 to -40 points.

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

- Perhaps because of the easing of Provincial restrictions (vaccine card requirements, mask mandates, etc.), BC residents' comfort with almost all activities (except for restaurants), modes of transportation, and accommodations decreased this wave.
  - Biggest decreases are for taking a cruise (down -19 points to 22%, potentially impacted by the last minute cancellation of the Caribbean Princess), staying at shared economy accommodations (down -16 points to 48%), and travel by car or RV for non-essential travel (down -10 points to 77%).

# KEY HIGHLIGHTS – WHAT’S NEW OR CHANGED



## BRITISH COLUMBIANS’ CONCERNS WELCOMING CANADIAN VISITORS (SLIDES 22-24)

- Measured every two months, BC residents’ concern welcoming Canadian visitors continues to drop significantly for all provinces and regions, especially for those from Saskatchewan and Manitoba (down -13 points to 42%), Ontario and Quebec (each down -11 points to 48% and 50%, respectively), and Alberta (down -10 points to 47%).

## IMPORTANCE OF TOURISM TO BC AND COMMUNITIES (SLIDE 25)

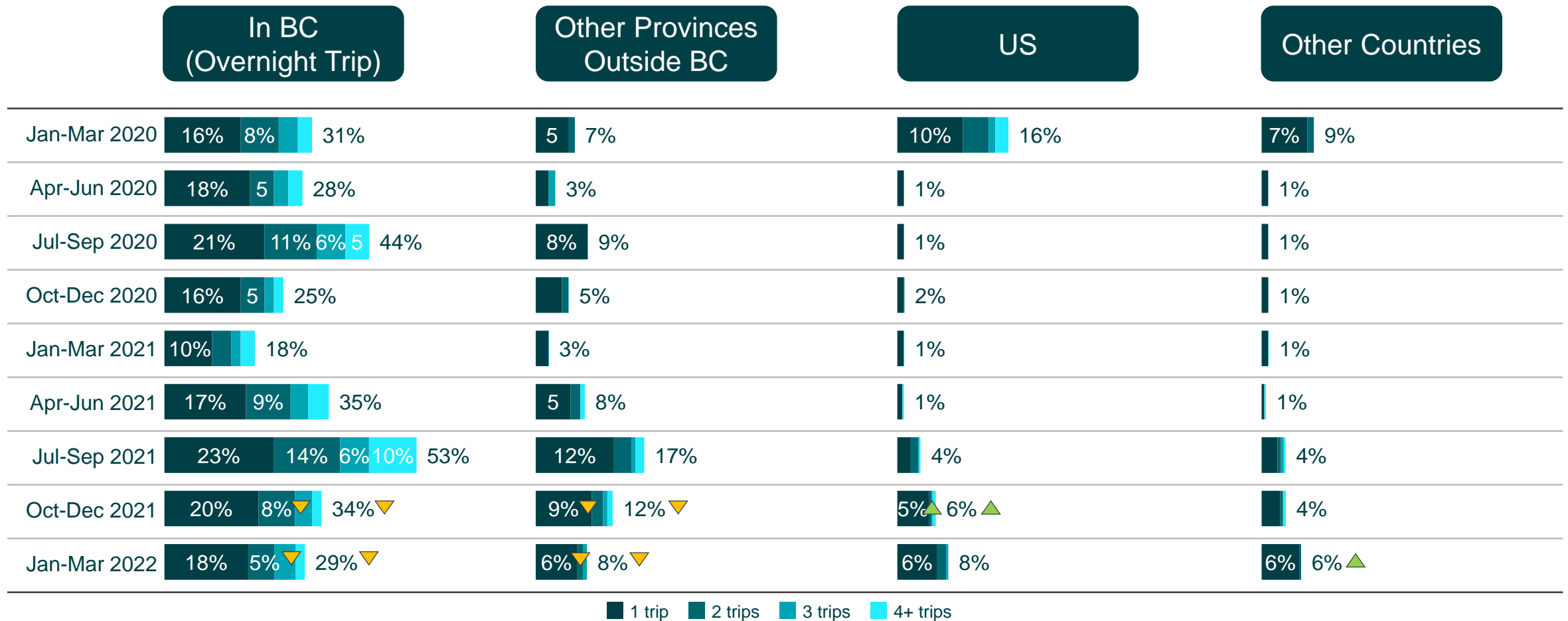
- When asked how much they agree with six statements regarding the importance of tourism to the province and their community, 84% of BC residents strongly or somewhat agree that ‘*The tourism industry plays an important role in British Columbia’s economic recovery from the COVID-19 pandemic*’, 79% agree that ‘*The tourism supports a greater diversity of amenities (such as restaurants, attractions, recreation facilities, and events) than would otherwise exist in my community*’, while 76% agree that ‘*Tourism plays a positive role in preserving, sharing, and celebrating the culture and history of my community*’.

## IMPACT OF GAS PRICES ON SPRING/SUMMER TRAVEL INTENTIONS (SLIDE 26)

- Not surprisingly, the rising price of gas/fuel will impact the number of trips British Columbians take within the province, with over one-third each saying they will take fewer day trips to nearby communities (37%) and overnight trips within BC (34%). However, around one-half state they plan to take the same number of day and overnight trips within the province.

# 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/July 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. 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.

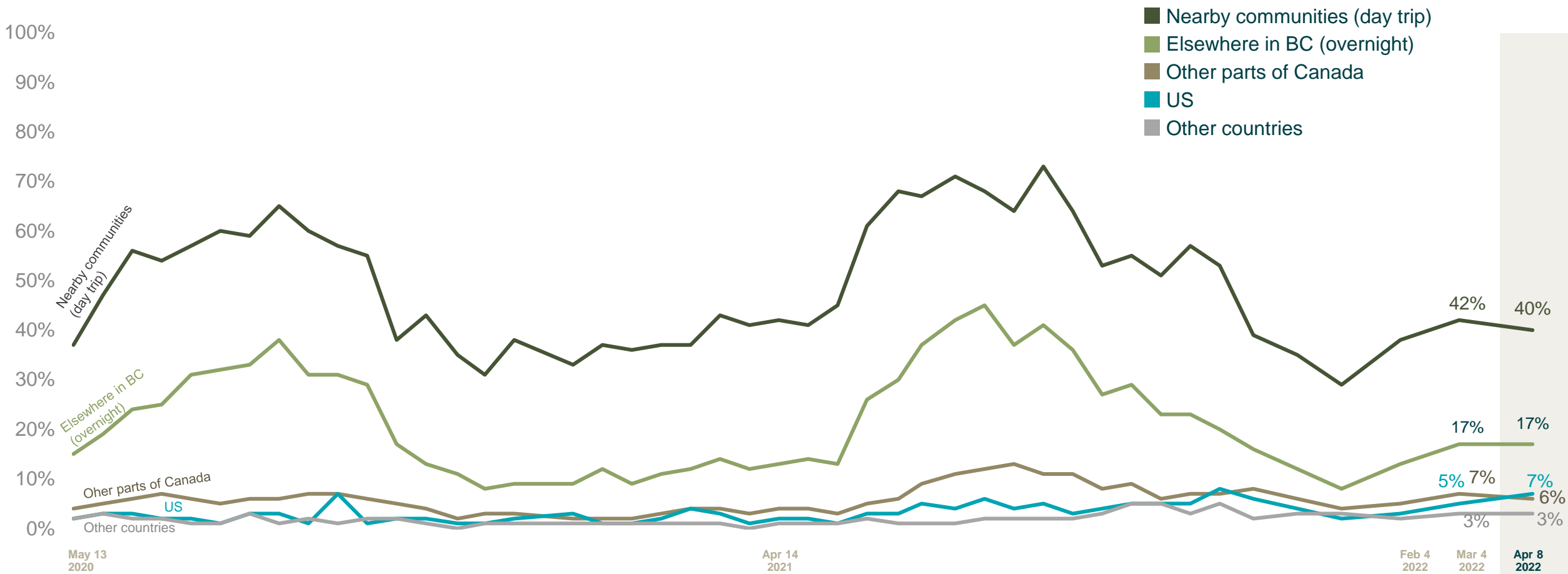
▼ Statistically significantly **lower** than previous wave.

# TRAVEL INTENT



# Tracking British Columbians' Travel Intent Within Next 4 Weeks

(By Destination)

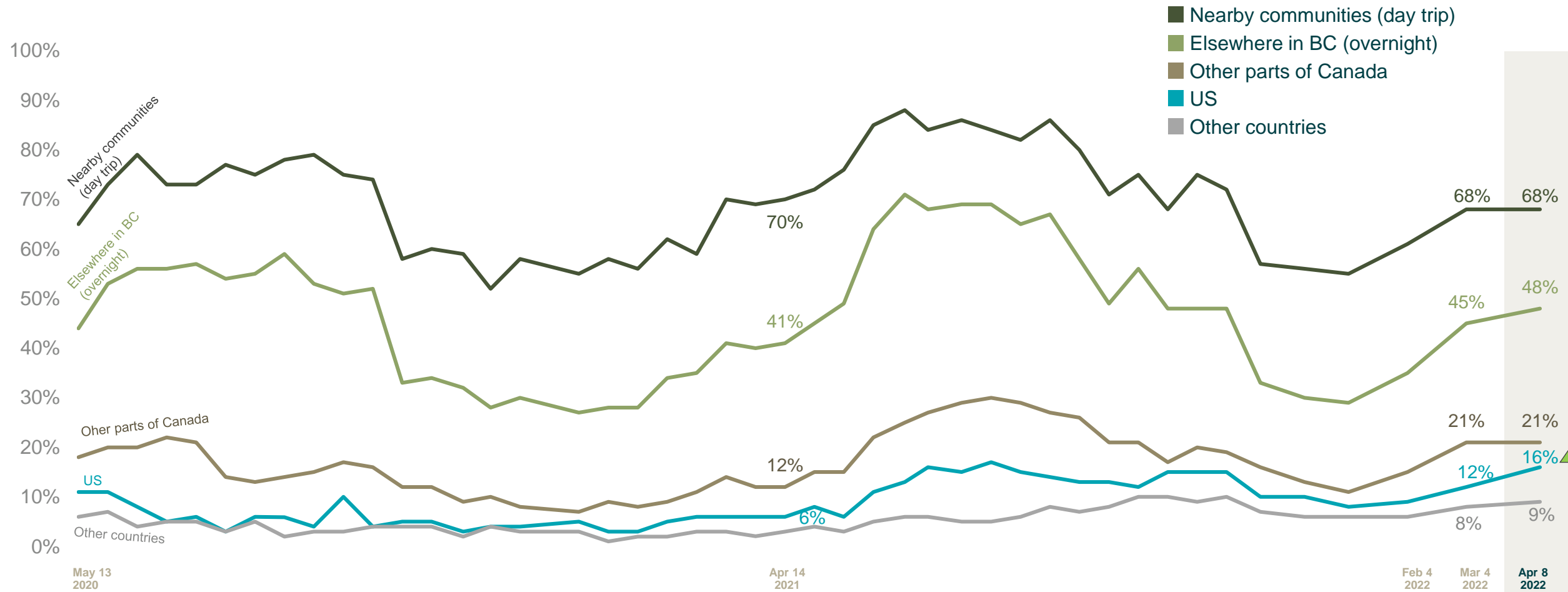


NOTE: Response category “only when vaccine or treatment for COVID-19 available” removed Jun 23, 2021.  
Base: All respondents  
D3. When, if at all, are you likely to make trips to the following destinations?

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

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

(By Destination)

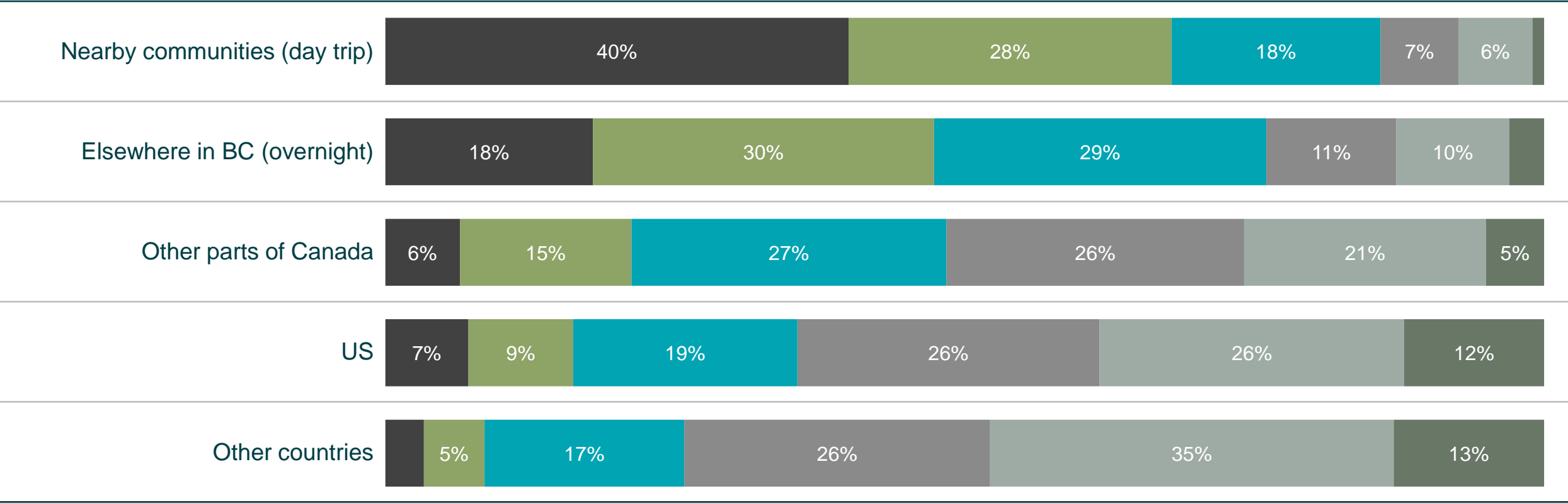


NOTE: Response category “only when vaccine or treatment for COVID-19 available” removed Jun 23, 2021.  
Base: All respondents  
D3. When, if at all, are you likely to make trips to the following destinations?  
Due to rounding, the total may not equal 100% to the sum of individual values shown.

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

# Snapshot Of British Columbians' Travel Intentions

(Wave 45 –Apr 8, 2022)

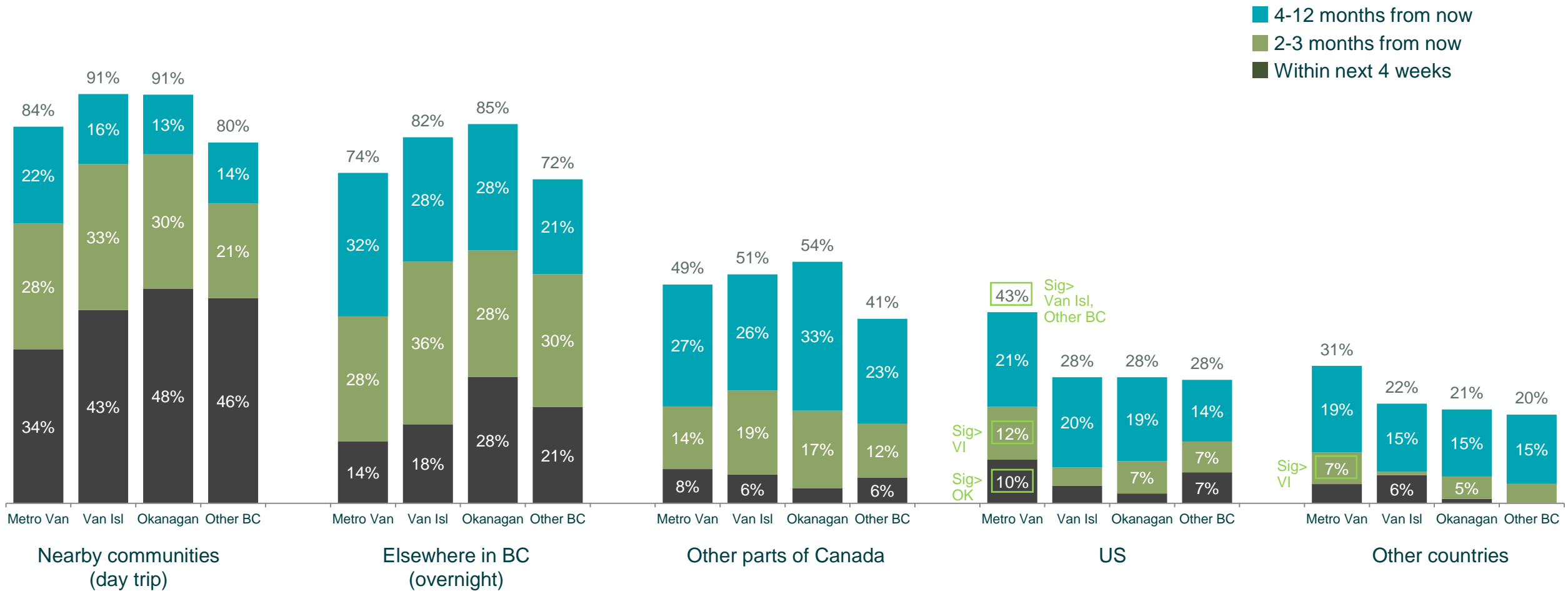


■ Within next 4 weeks ■ 2-3 months from now ■ 4-12 months from now ■ Within 2 years ■ Not sure, but longer than 2 years ■ Never

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 45 – Apr 8, 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.

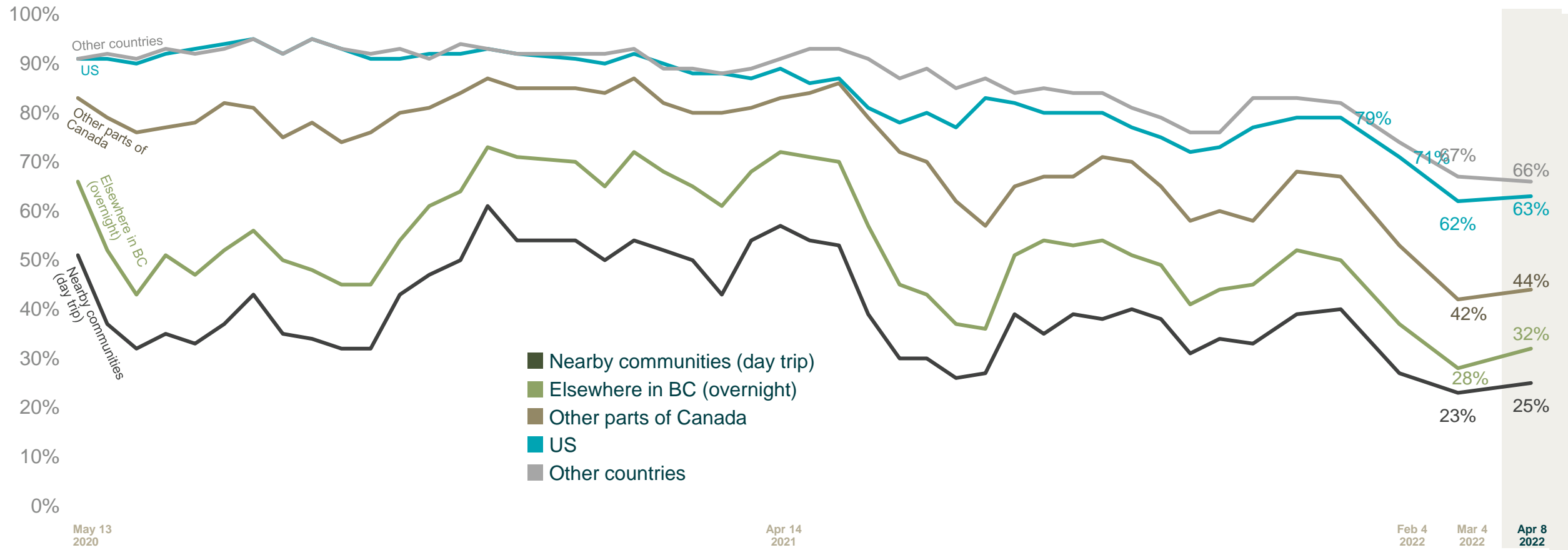
Statistically significantly **higher** than comparison group(s).  
Statistically significantly **lower** than comparison group(s).

# CONCERN WELCOMING VISITORS



# Tracking British Columbians' Concern Welcoming Visitors

(Total Very/Somewhat Concerned By Visitor Origin)

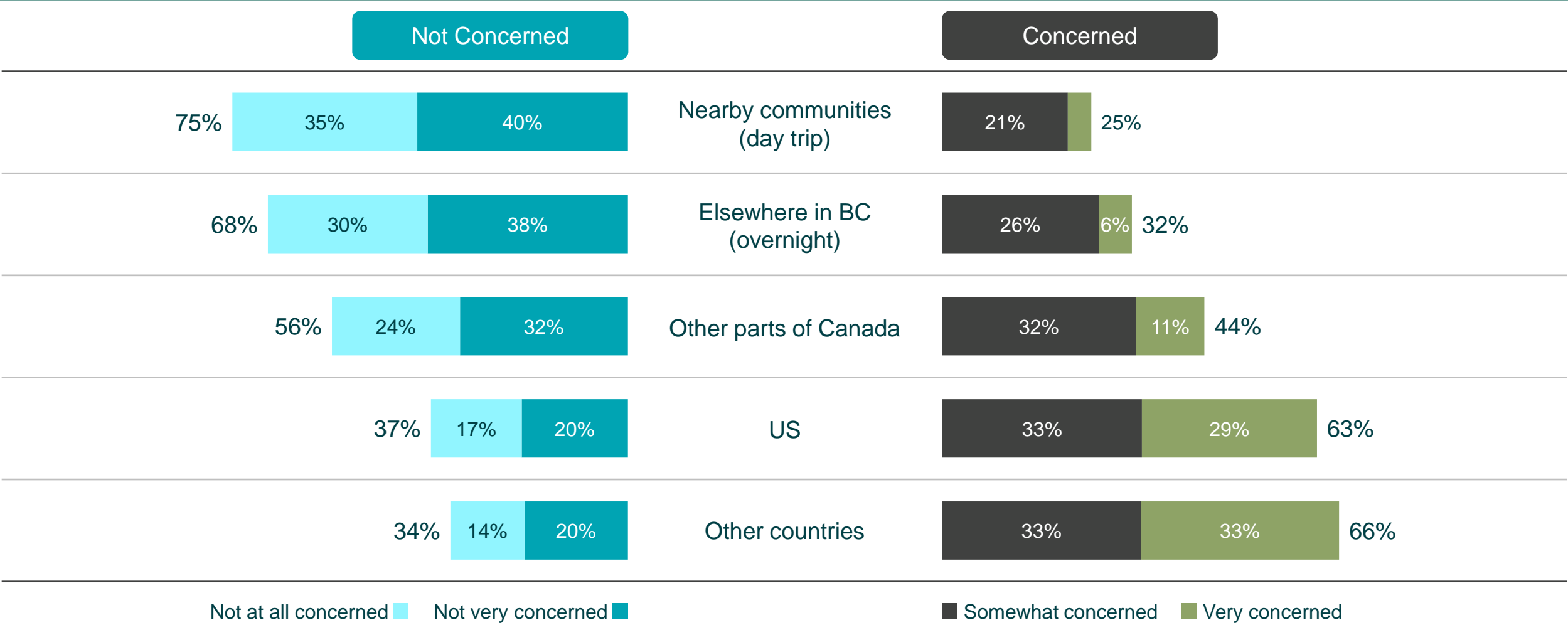


Base: All respondents  
D2. Given the current situation with COVID-19, how concerned would you be with the following types of visitors making non-essential trips into your community over the next few weeks?

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

# Snapshot Of British Columbians' Concern Welcoming Visitors

(Wave 45 – Apr 8, 2022)

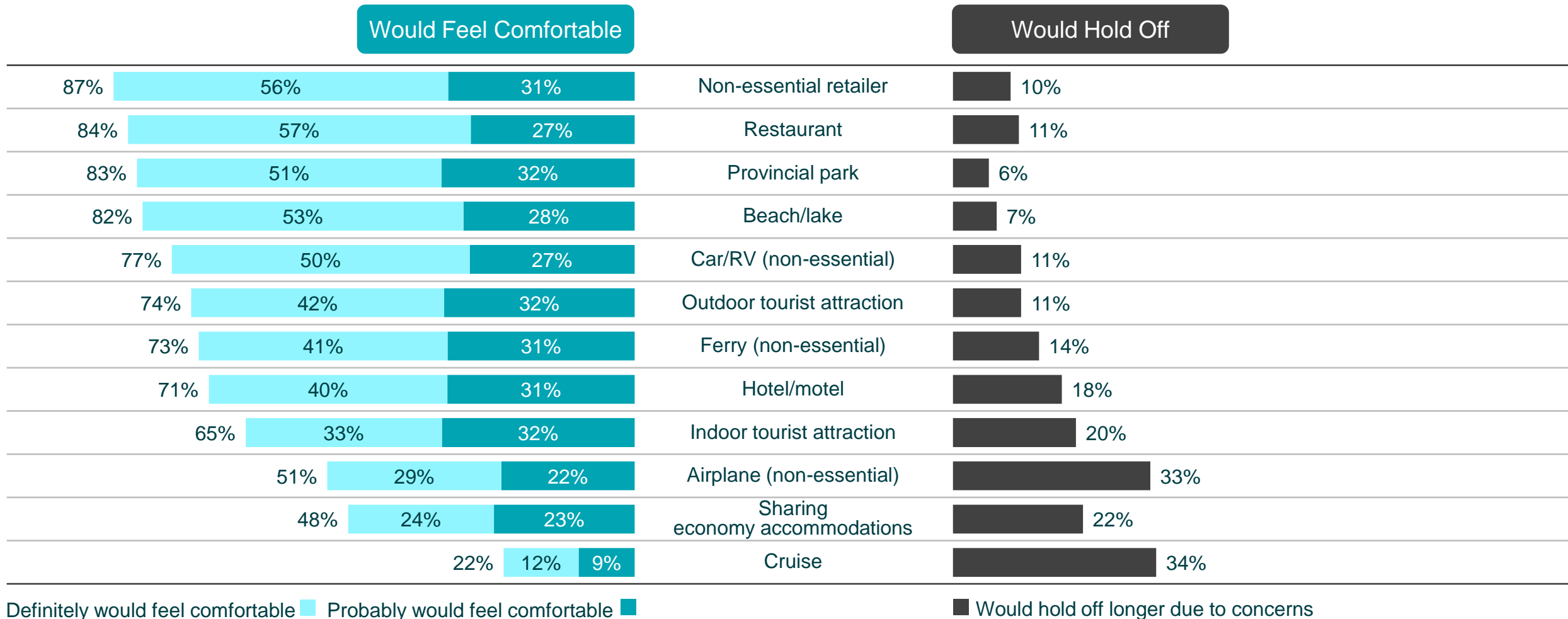


Base: All respondents  
D2. Given the current situation with COVID-19, how concerned would you be with the following types of visitors making non-essential trips into your community over the next few weeks?  
Due to rounding, the sum of the individual values shown may not add up to the total shown.

# COMFORT LEVELS BY ACTIVITY / TRANSPORTATION / ACCOMMODATION

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

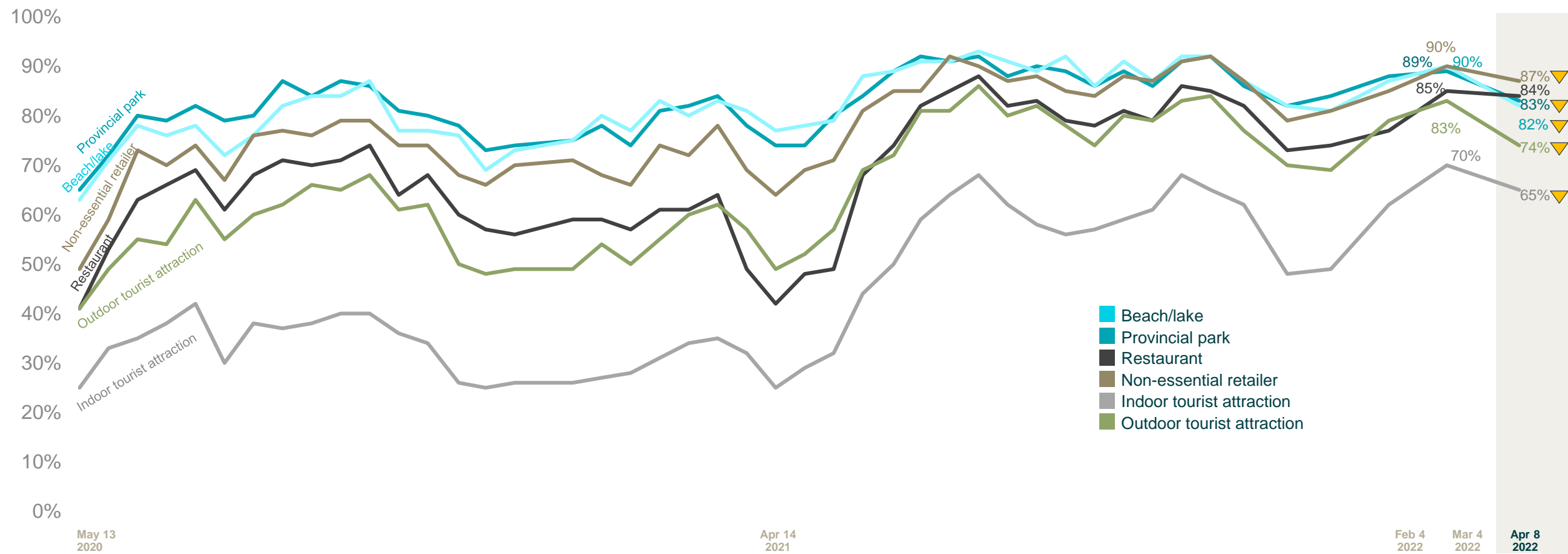
(Wave 45 – Apr 8, 2022)



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 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)



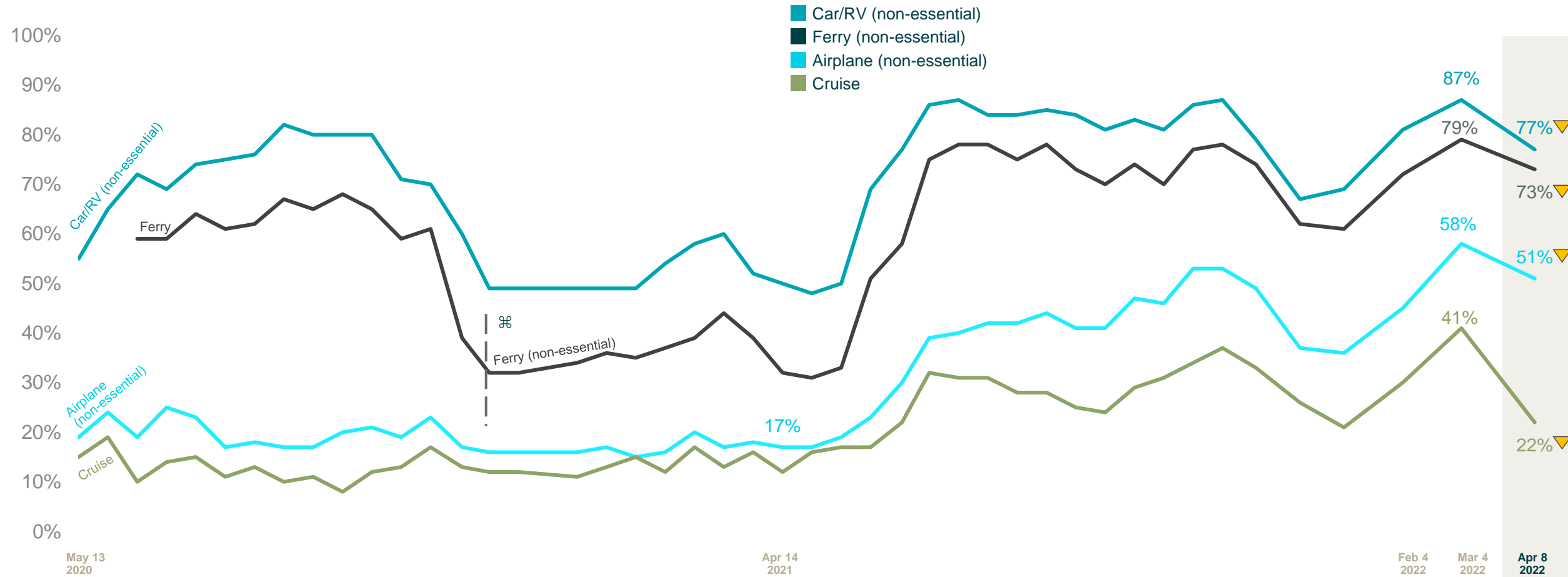
Base: All respondents, excluding not applicable/don't do this in general and not applicable/wouldn't do this at this time of year  
D1. Would you be comfortable doing/using each of the following in the next few weeks, or are you be likely to hold off longer due to concerns about COVID-19?

▲ 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)



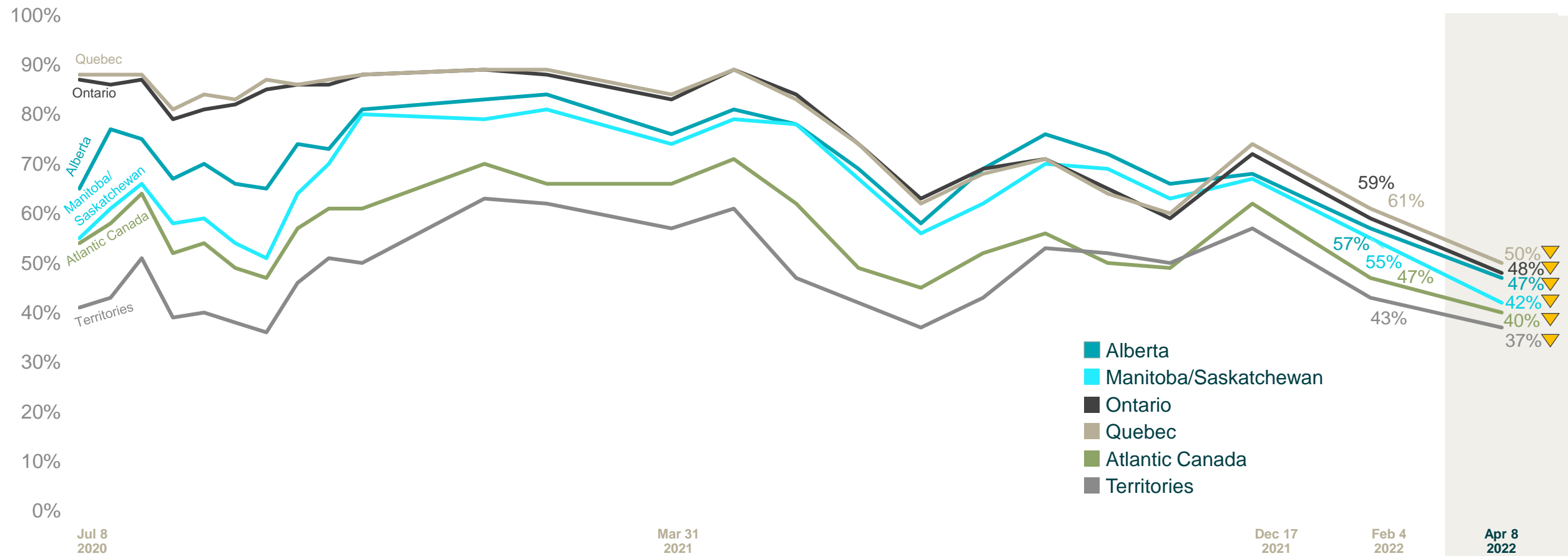
Base: All respondents, excluding not applicable/don't do this in general and not applicable/wouldn't do this at this time of year  
D1. Would you be comfortable doing/using each of the following in the next few weeks, or are you be likely to hold off longer due to concerns about COVID-19?

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

# CURRENT AD-HOC FINDINGS

# Tracking British Columbians' Concern Welcoming Canadian Visitors

(Total Very/Somewhat Concerned By Origin)

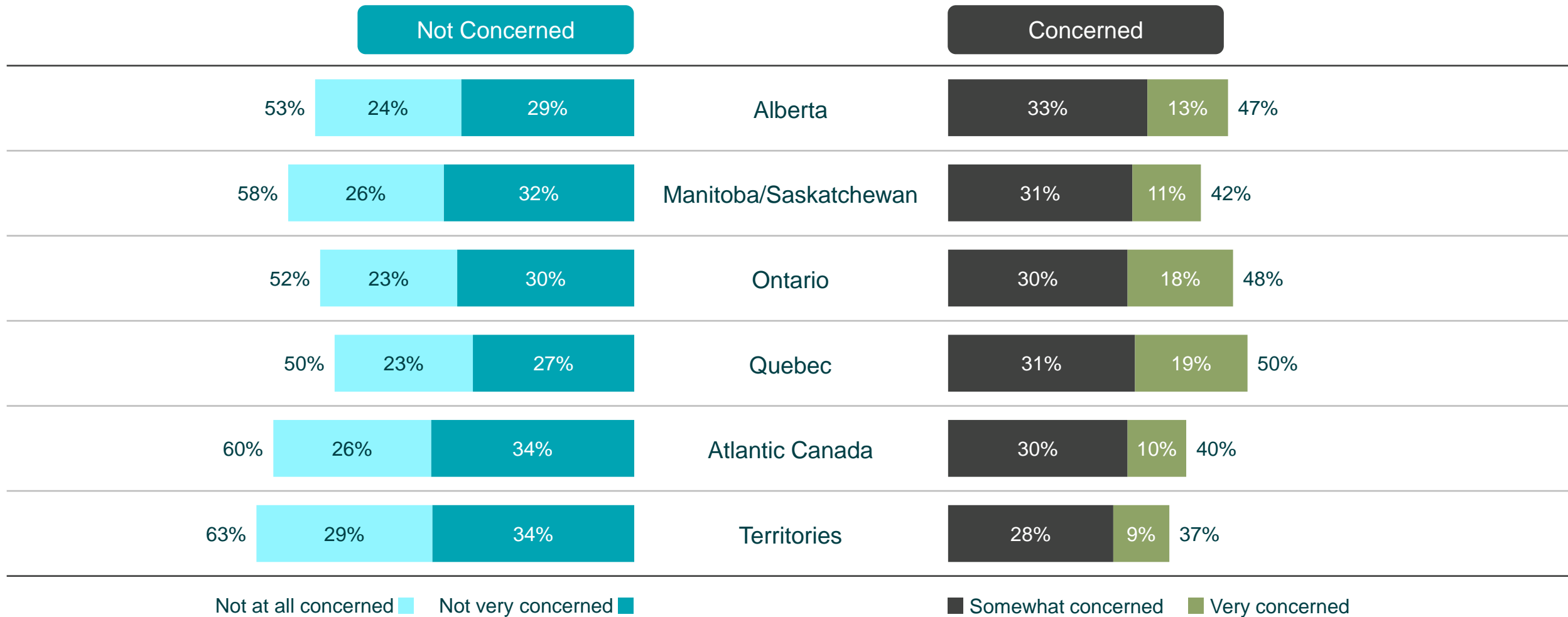


⌘ Question frequency changed from bi-weekly to monthly starting November 12, 2020.  
Base: All respondents  
D2a. And how concerned would you be with the following types of Canadian visitors making non-essential trips into your community over the next few weeks?

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

# Snapshot Of British Columbians' Concern Welcoming Canadian Visitors

(Wave 45 – Apr 8, 2022)



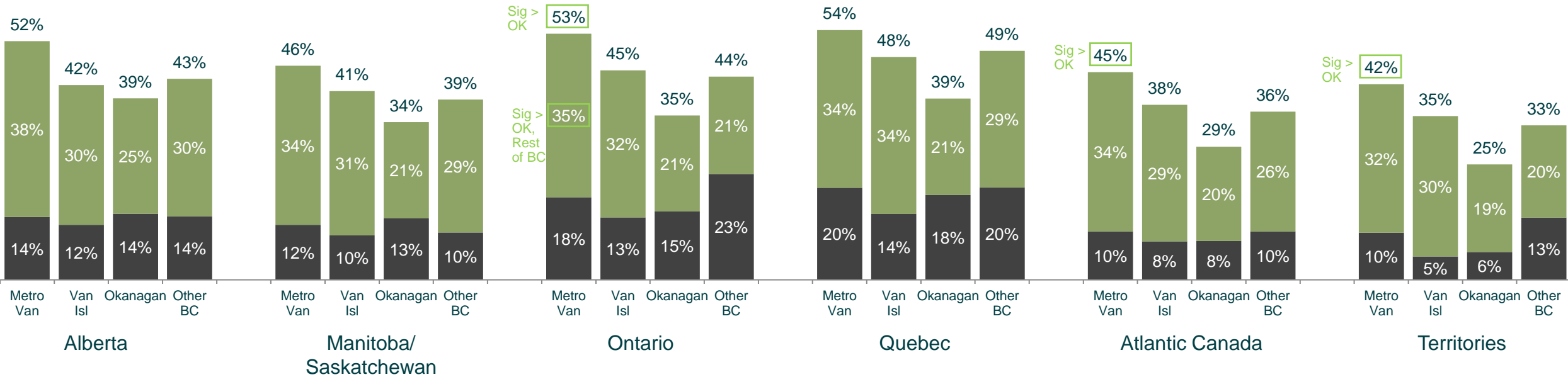


# Snapshot Of British Columbians' Concern Welcoming Canadian Visitors By Region

(Wave 45 – Apr 8, 2022)



Very concerned  
Somewhat concerned

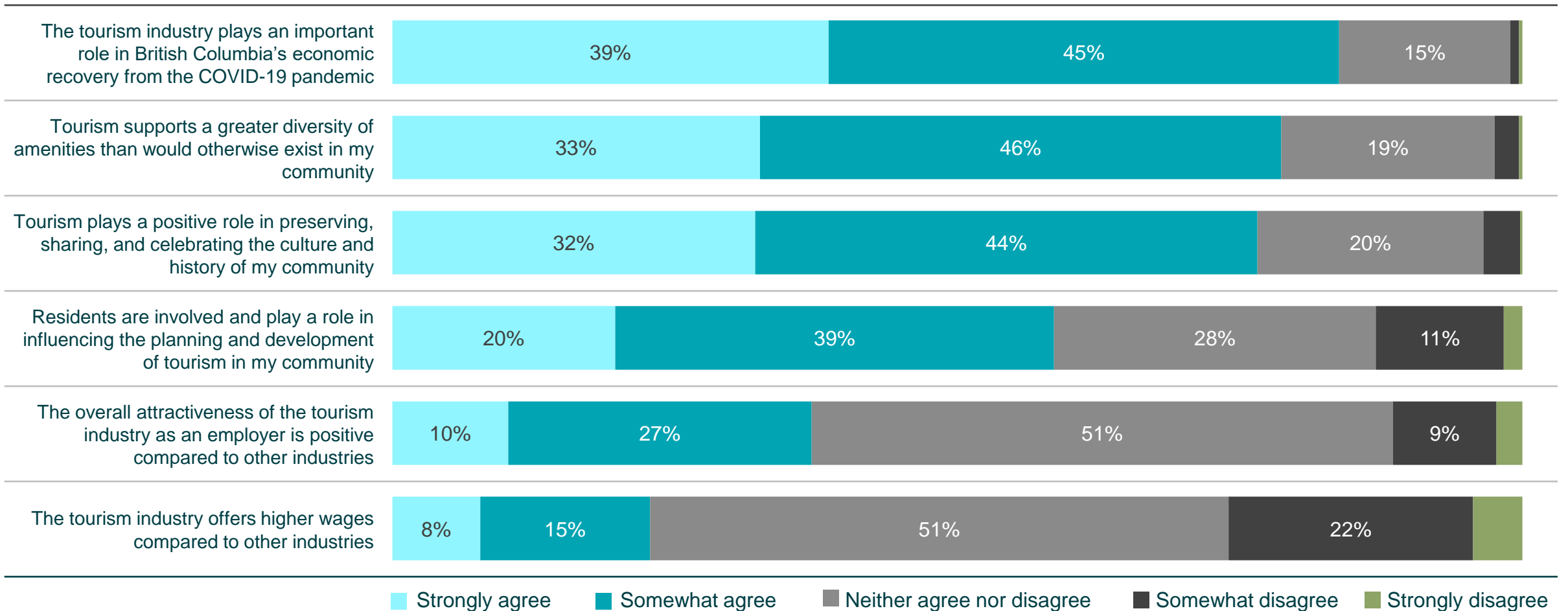


Base: All respondents  
D2a. And how concerned would you be with the following types of Canadian visitors making non-essential trips into your community over the next few weeks?  
Due to rounding, the sum of the individual values shown may not add up to the total shown.

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

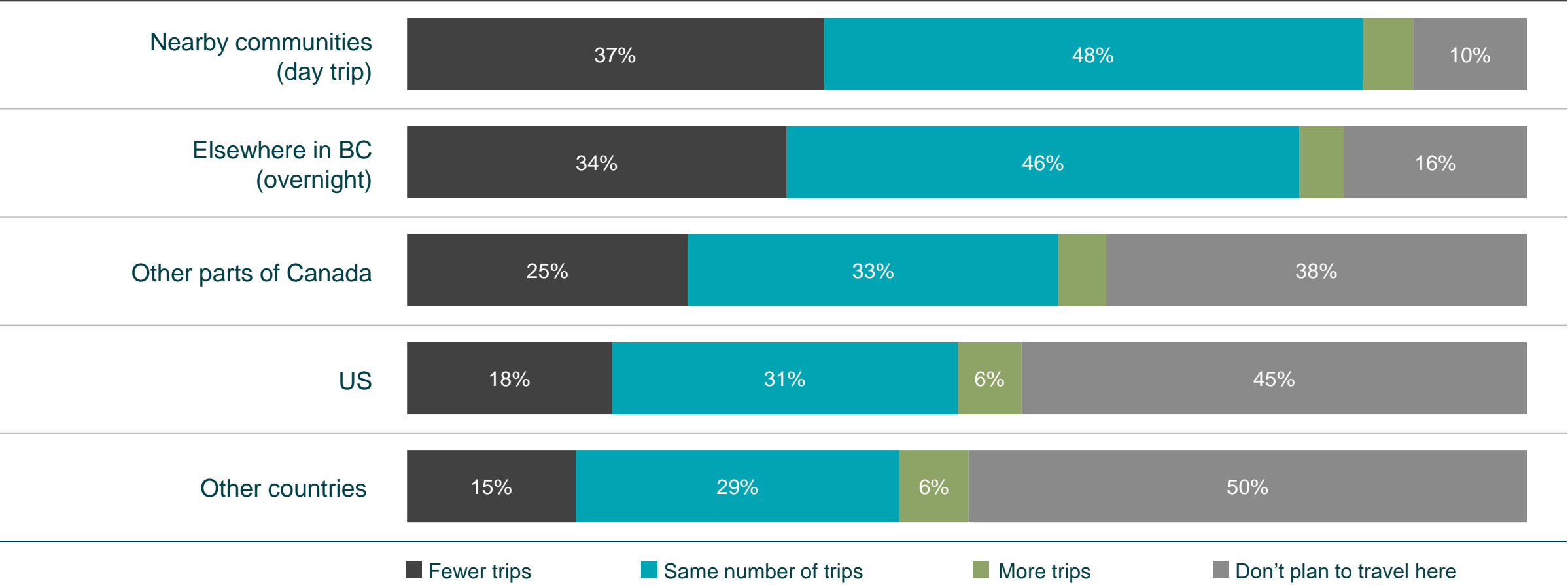
# Importance of Tourism

(Wave 45 – Apr 8, 2022)



# Impact of Gas Prices on Spring/Summer Travel Intentions

(Wave 45 – Apr 8, 2022)



# APPENDIX: METRICS BY DEMOGRAPHICS

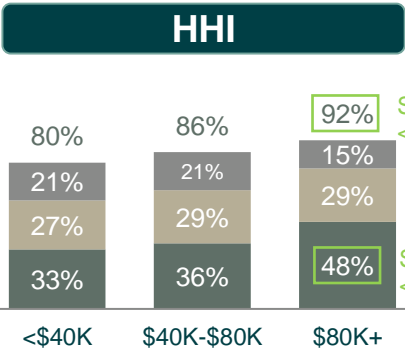
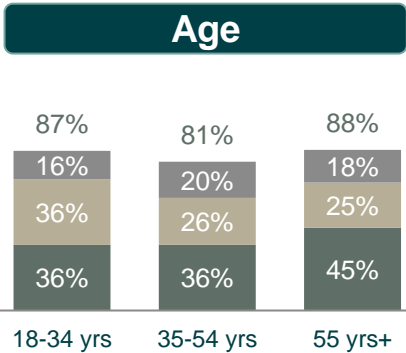
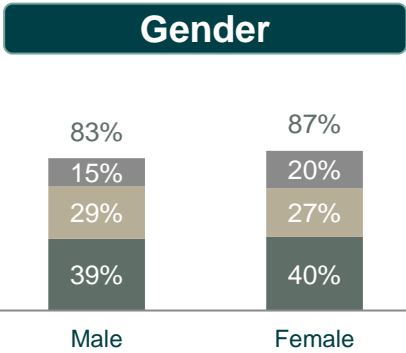
# Snapshot Of British Columbians' Travel Intent By Demographics

(Wave 45 – Apr 8, 2022)

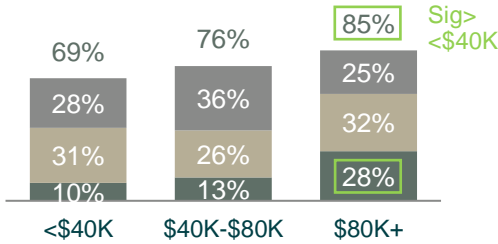
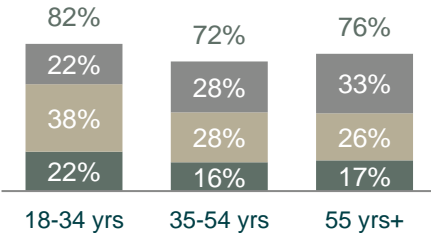
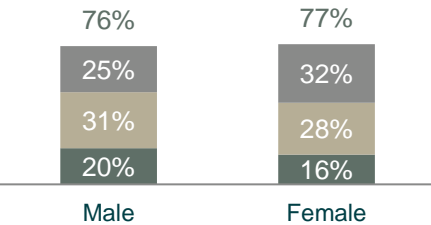


- 4-12 months from now
- 2-3 months from now
- With next 4 weeks

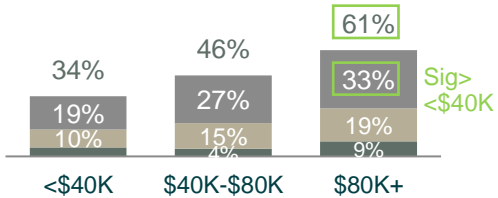
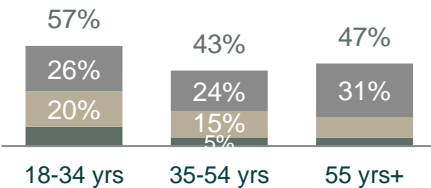
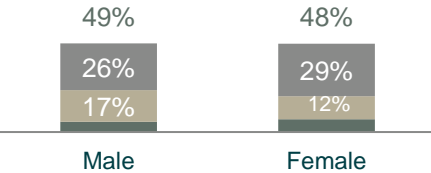
Nearby communities  
(day trip)



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 45 – Apr 8, 2022)



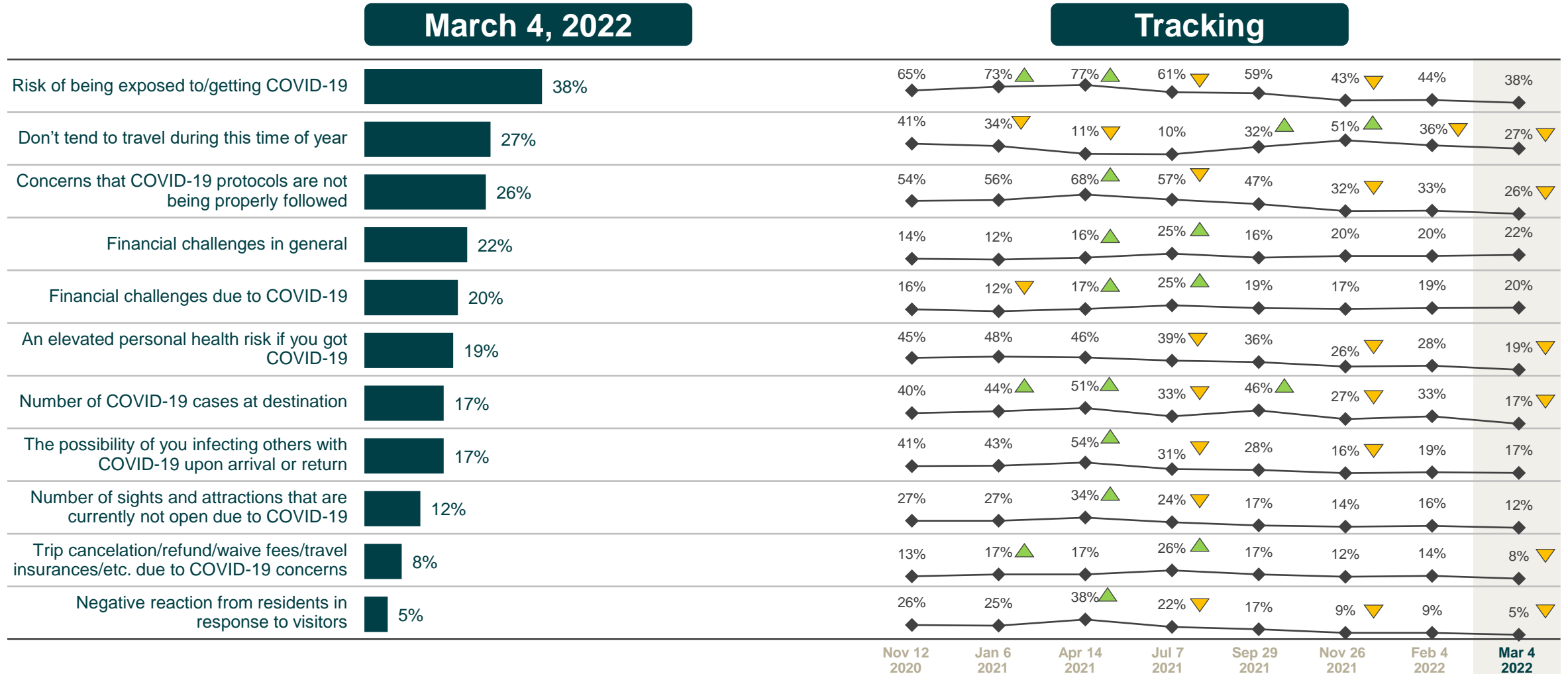
Base: All respondents  
D2. Given the current situation with COVID-19, how concerned would you be with the following types of visitors making non-essential trips into your community over the next few weeks?

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

# APPENDIX: PAST AD-HOC FINDINGS

# Reasons For Not Considering Future BC Travel (Aided)

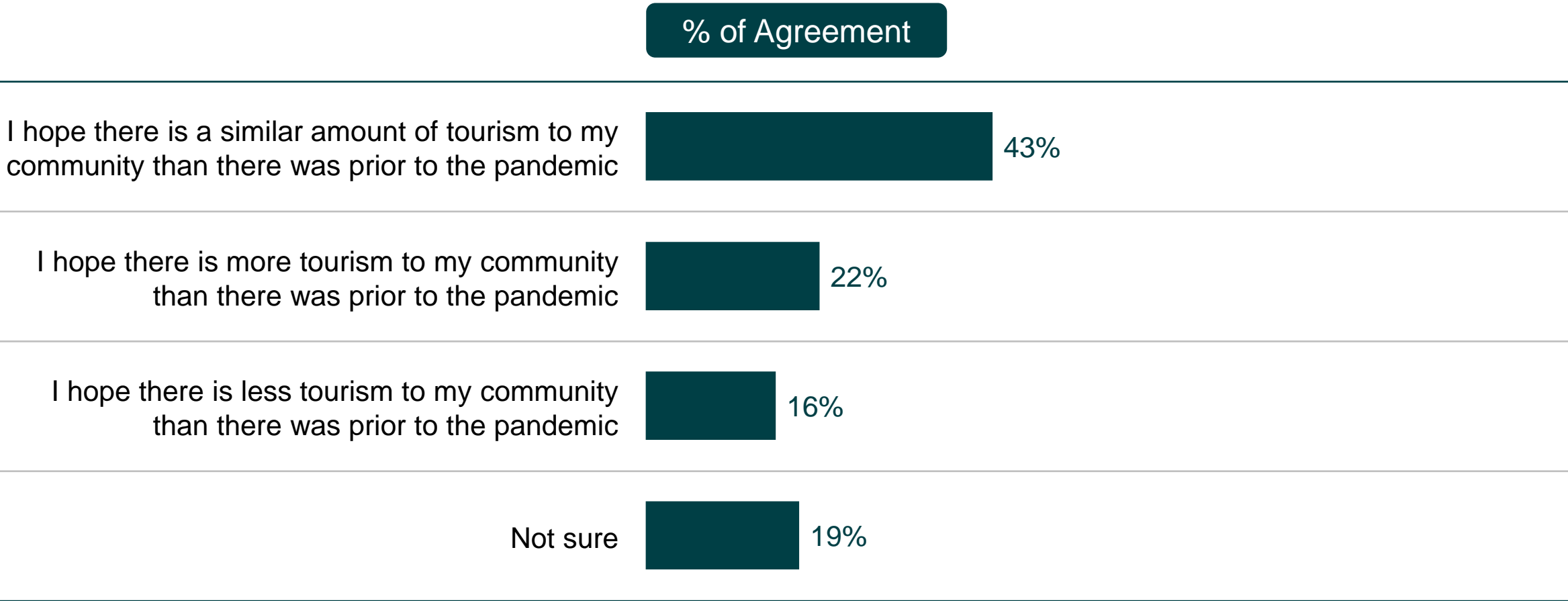
(Among Those Not Intending to Travel in BC in the Next 3 Months)



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?

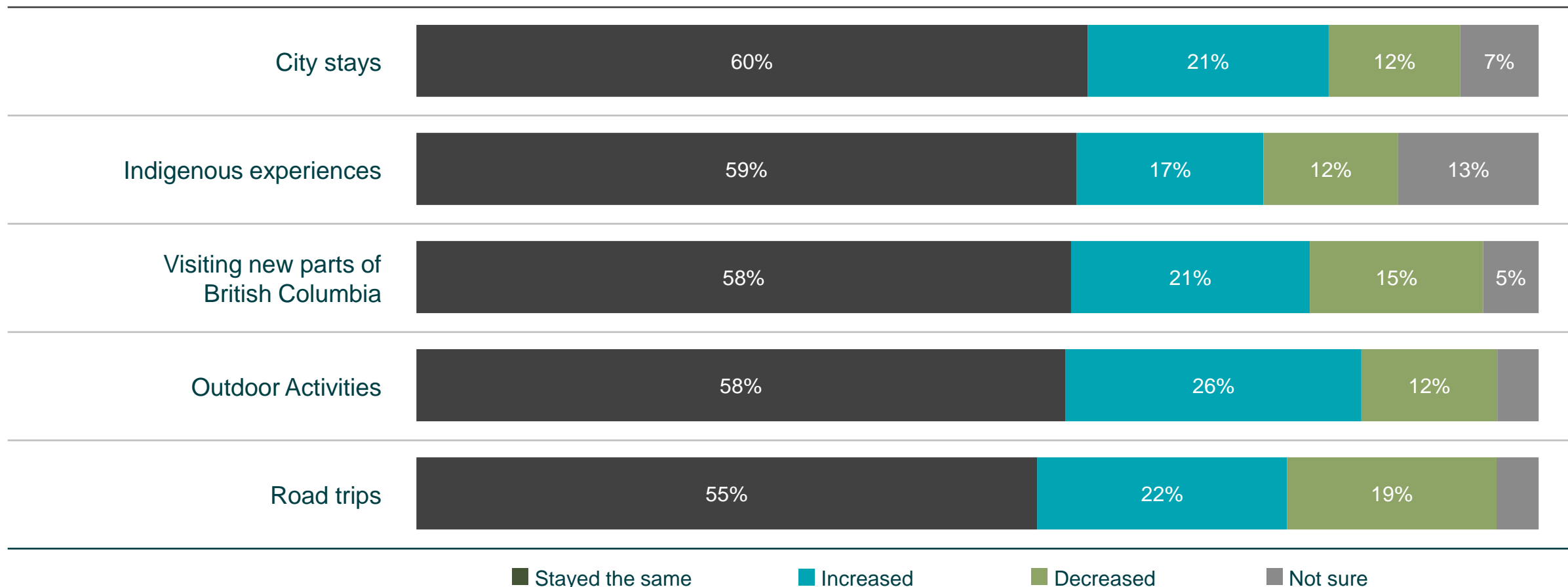
# Attitudes Towards Tourism Post-COVID-19

(Wave 44 - March 4, 2022)



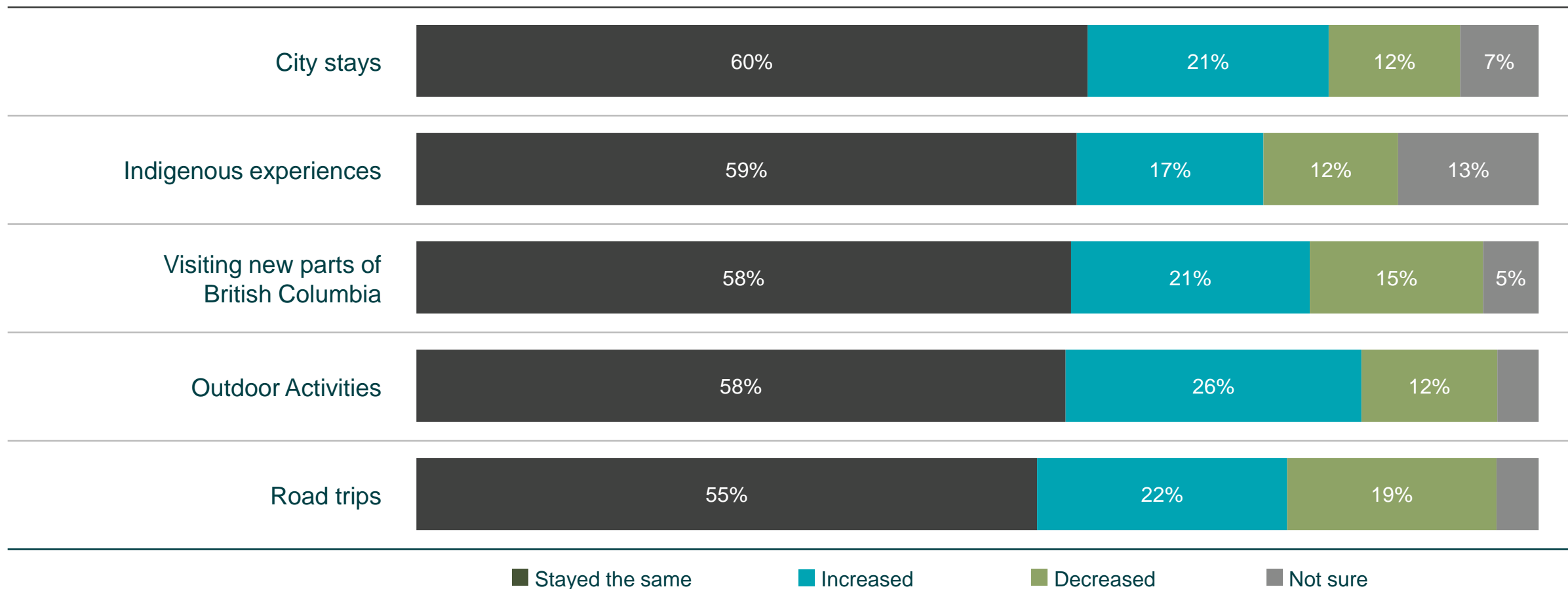
# Interest in BC Activities/Experiences Compared to Two Years Ago

(Wave 44 – Mar 4, 2022)



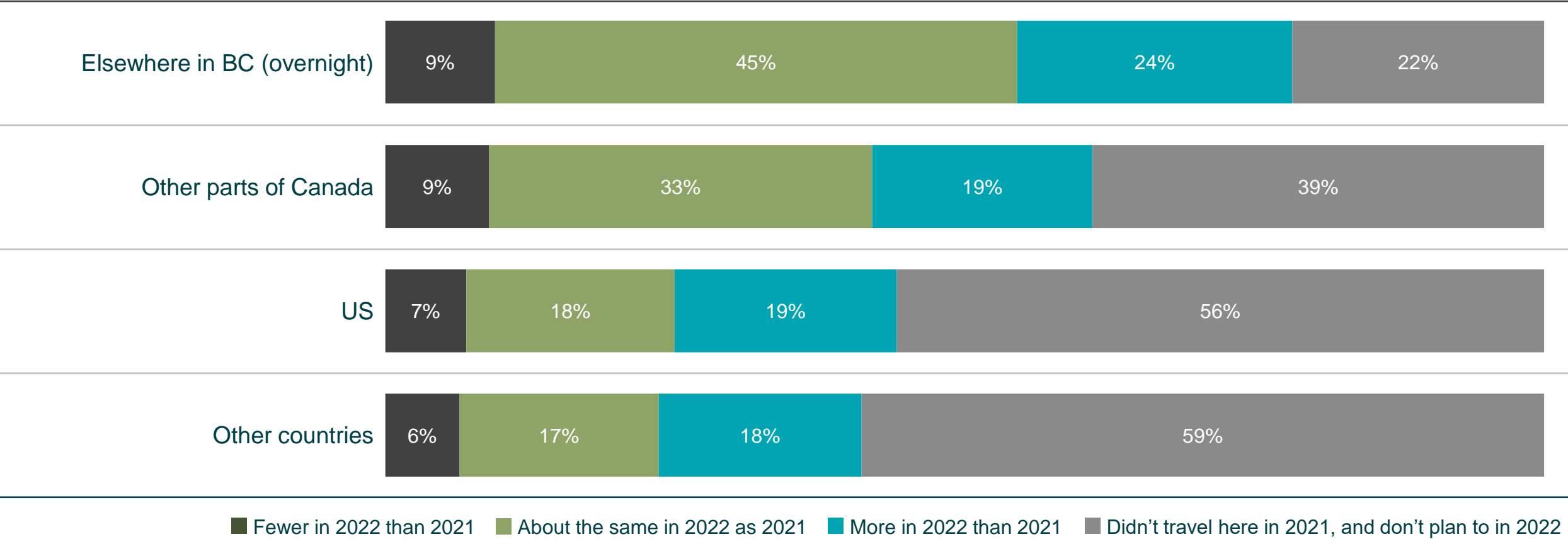
# Interest in BC Activities/Experiences Compared to Two Years Ago

(Wave 44 – Mar 4, 2022)



# Likely 2022 Travel Compared to 2021

(Wave 41 – Jan 7, 2022)



■ Fewer in 2022 than 2021 ■ About the same in 2022 as 2021 ■ More in 2022 than 2021 ■ Didn't travel here in 2021, and don't plan to in 2022

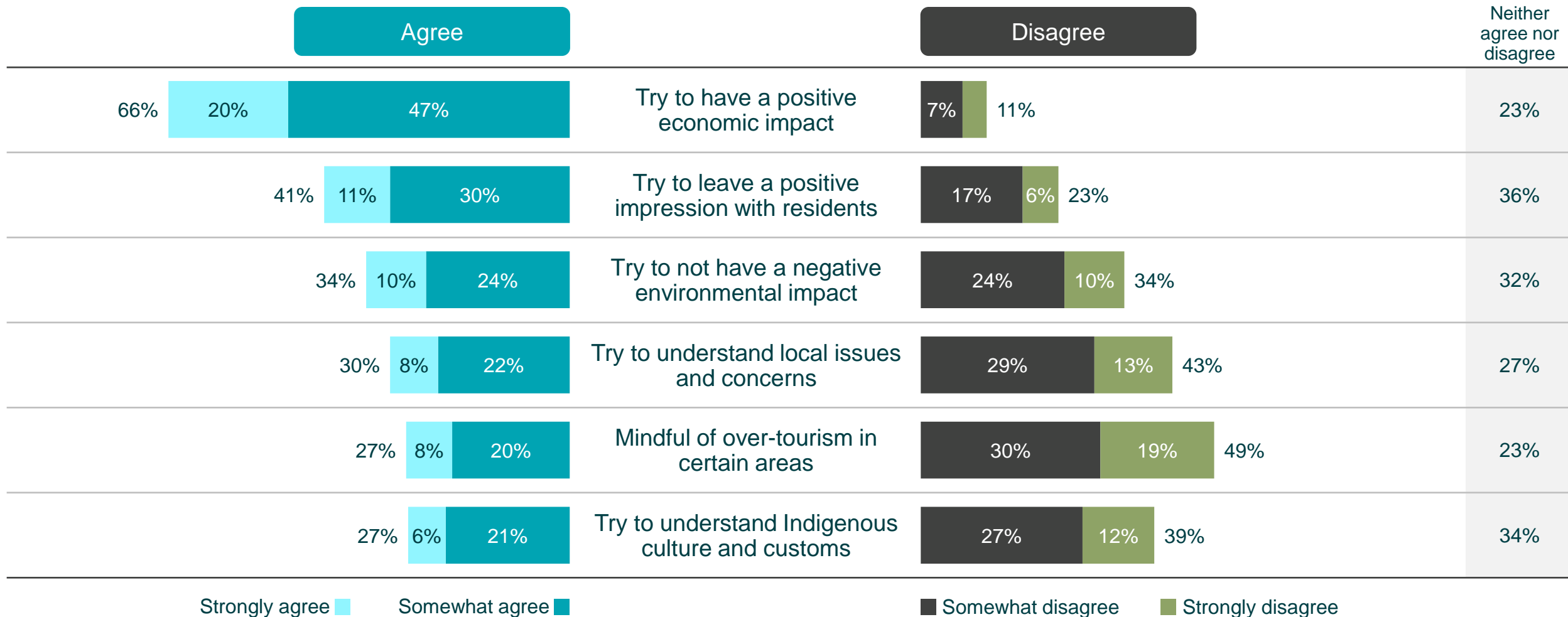
□ Statistically significantly **higher** than comparison group(s).  
□ Statistically significantly **lower** than comparison group(s).

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).



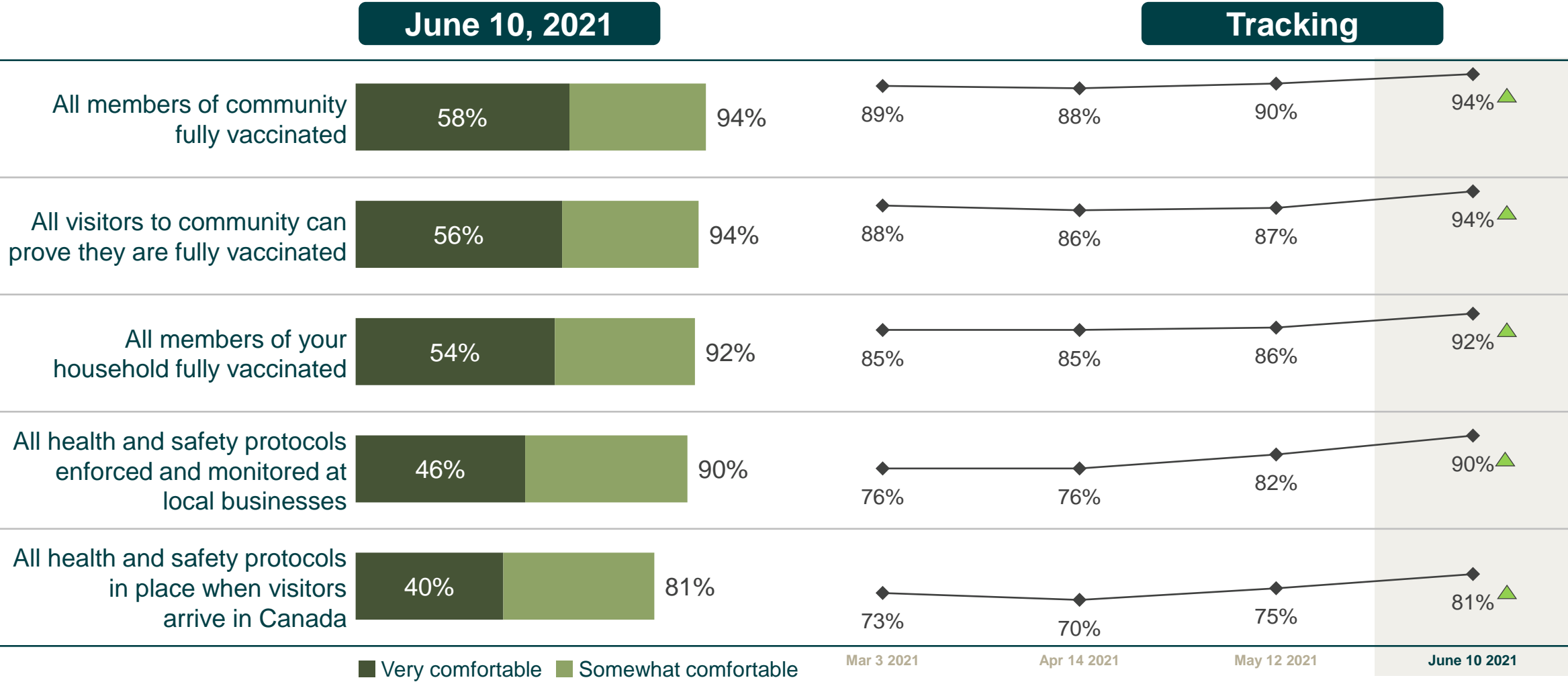
# British Columbians' Views On Visitors

(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.

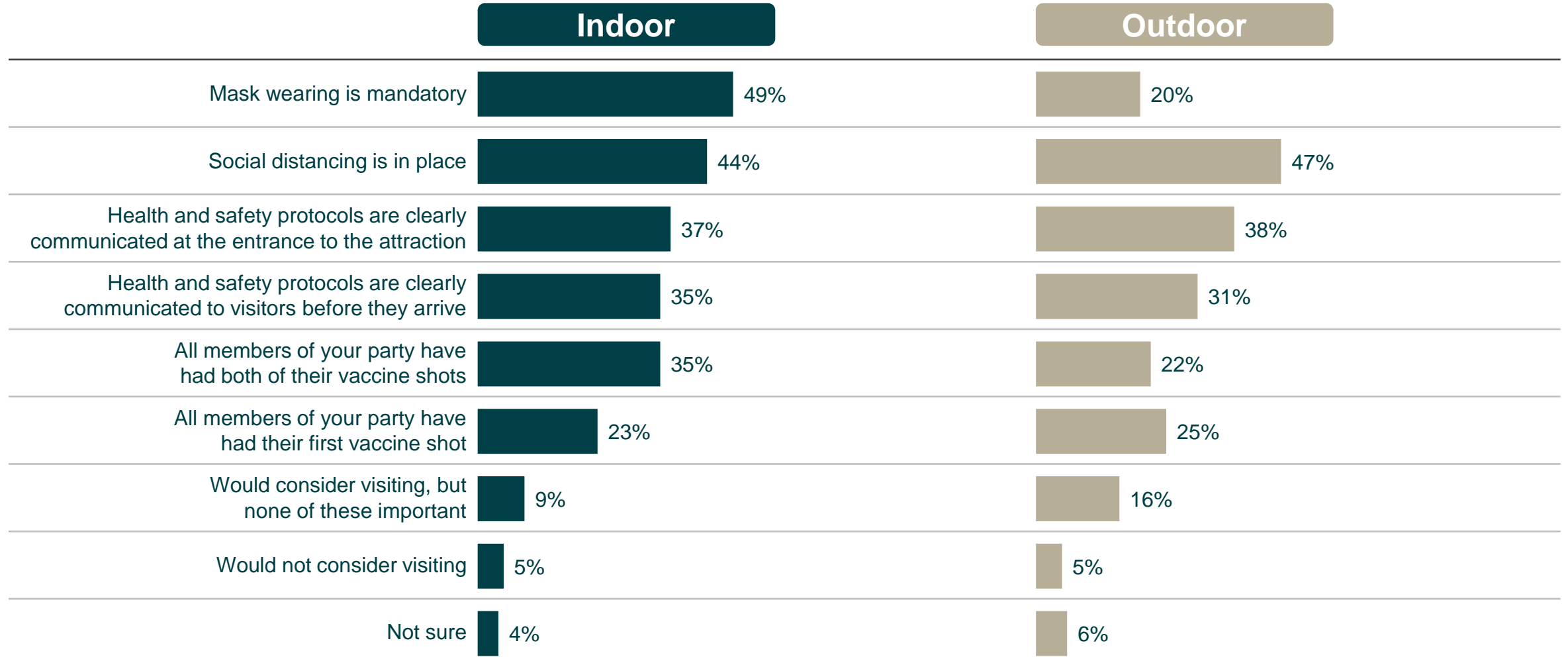
# Comfort With Welcoming Visitors Under Various Circumstances



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

# Important Circumstances In Visiting BC Attractions (Aided)

(Wave 29 – June 23, 2021)

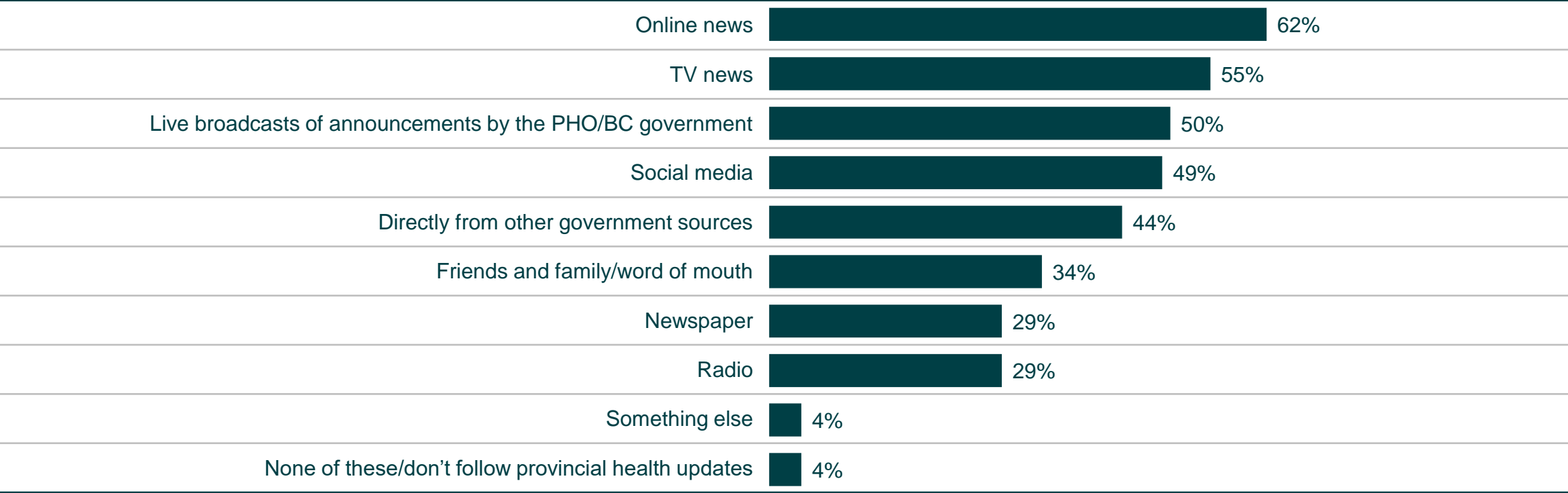


# Source Of Provincial COVID-19 Health Updates

(Wave 21 - March 3, 2021)

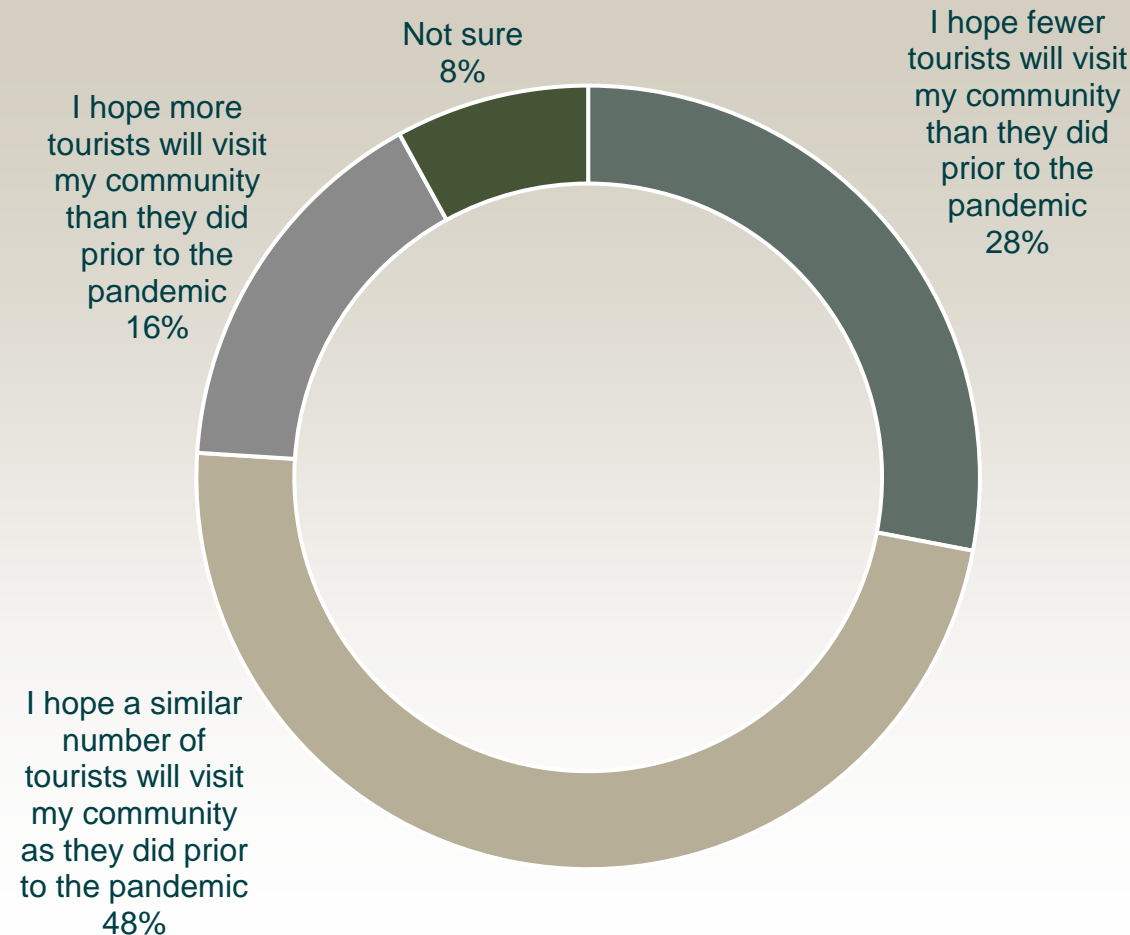


**March 3, 2021**  
(n=827)



# Preferred Tourism Post-Pandemic

(Wave 27 – May 26, 2021)



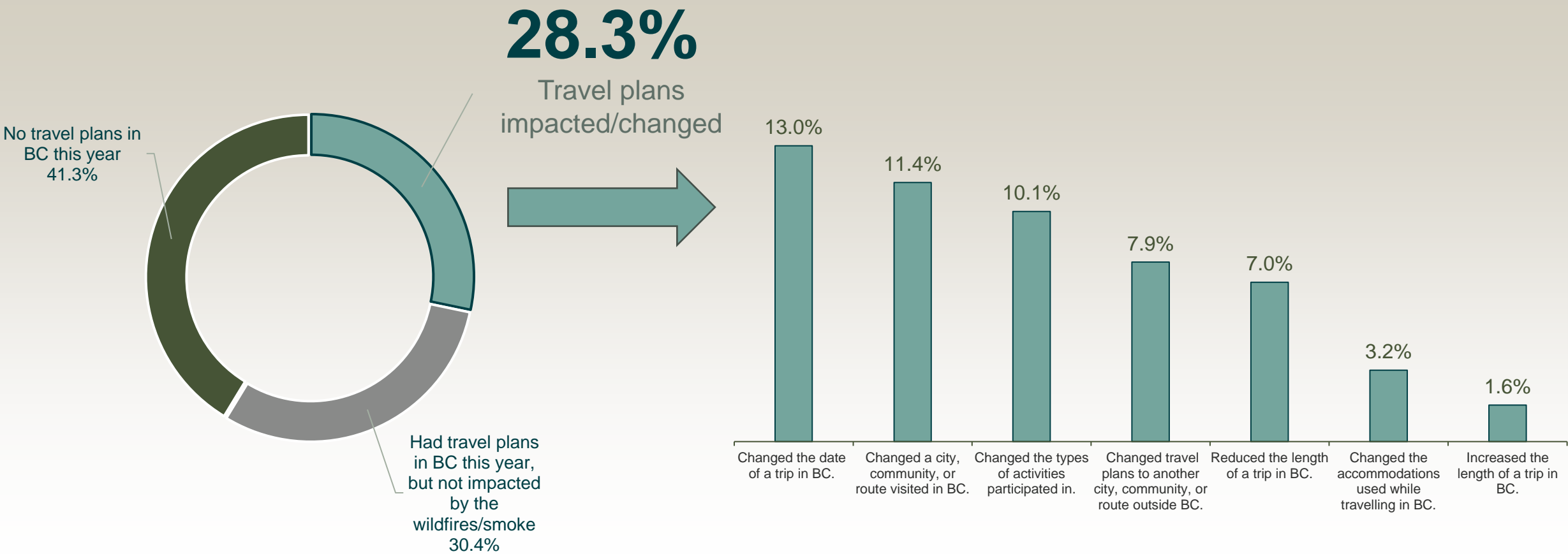
More Tourists	REGION	Fewer Tourists
15%	Metro Vancouver	27%
13%	Vancouver Isl	30%
19%	Rest of BC	28%
GENDER		
23%	Male	23%
9%	Female	32%
AGE		
9%	18 to 34	30%
17%	35 to 54	25%
20%	55+	29%
HH INCOME		
11%	<\$75K	31%
20%	\$75K+	27%

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:**

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