

BC Residents' Public Perceptions:  
COVID-19 Travel and Tourism  
Wave 52: November 4, 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%
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%
51	Oct 14-16, 2022	1,004	+/-3.1%
<b>52</b>	<b>Nov 4-6, 2022</b>	<b>1,004</b>	<b>+/-3.1%</b>

# KEY HIGHLIGHTS – WHAT’S NEW OR CHANGED



## TRAVEL INTENTIONS (SLIDES 6-10)

- Heading into the second month of Fall, the proportion of BC residents planning to travel short term (over the next 4 weeks) within the province has stabilized for both day trips and overnight travel, with no change from October. The same can be said for medium term (over the next 2-3 months) travel intent, as changes are directional, decreasing -2 points for overnight trips and up +2 points for day trips.
  - Compared to this same time last year, short term travel intentions within BC for overnight are identical to November 2021, but are down -6 points for day trips. Medium term travel plans within BC are down from the same time last year, with drops of -5 points for day trips and -8 points for overnight.
- Short term intentions for travel to other provinces is identical to October and decreased directionally by -3 points for medium term travel (over the next 2-3 months). Next 4 weeks travel intentions to other parts of Canada is similar to November 2021 and is also stable for within the next 2-3 months compared to last year.
- Intent to travel to the U.S. dropped significantly for the short term (down -3 points) and dipped directionally for the medium term (-2 points); it remains at higher levels than a year ago. Travel plans to destinations in other countries are at similar levels to October for the next 4 weeks and next 2-3 months. Short and medium term travel intent to other countries is the same as November 2021.

## CONCERN WELCOMING VISITORS (SLIDES 11-13)

- British Columbians' concern welcoming visitors from most markets continues to be at near record lows, with very similar proportions to October in terms of the number of residents who are concerned.

# KEY HIGHLIGHTS – WHAT’S NEW OR CHANGED



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

- Comfort with all transportation modes increased in November—high proportions of British Columbians are comfortable with travelling by car/RV (+3 points) and airplane (+5 points), while directional increases occurred for ferry and cruise travel. This bump could be related to the Federal Government removing all remaining COVID-19 travel requirements in October.
- As a result, comfort levels with all activities continue to be close to or at record high levels.

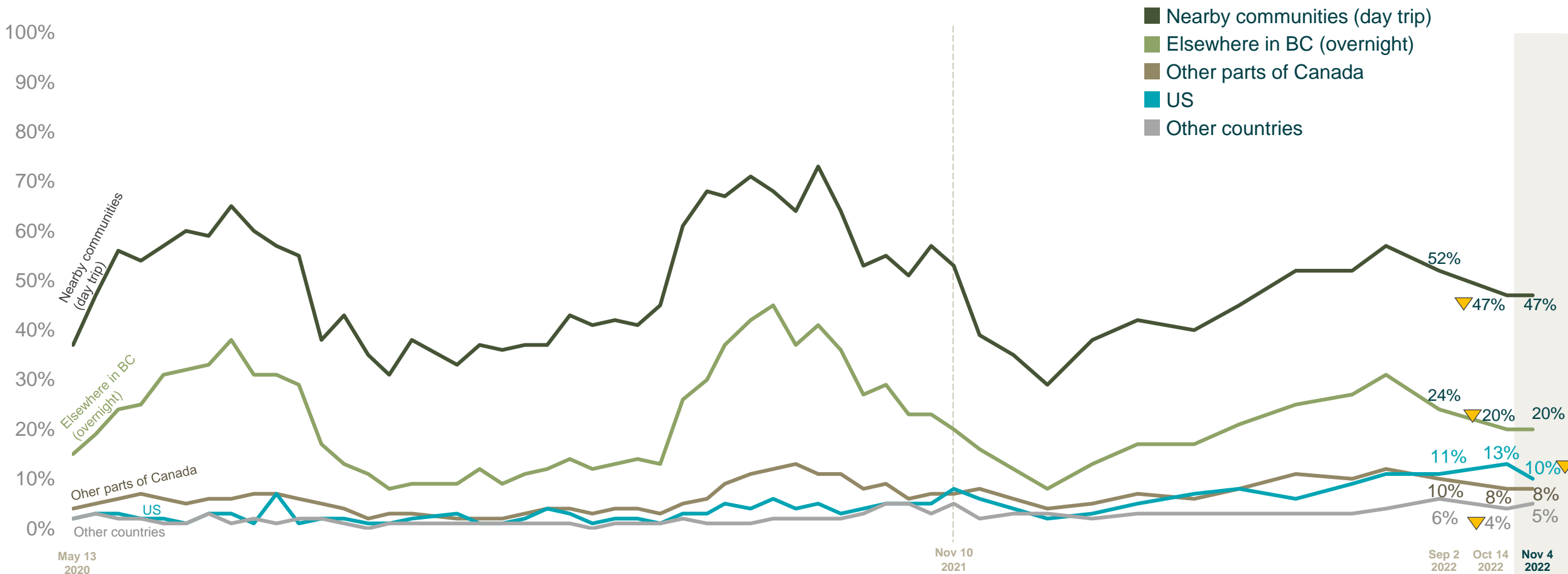
## VALUING VISITORS’ CONTRIBUTION TO LOCAL COMMUNITIES (SLIDES 20-23)

- In this month’s survey, BC residents were asked on a scale of 1 to 7, where 1 is strongly disagree and 7 is strongly agree, how much they agree with the statement, *I value the contribution visitors have on my local community*. Overall, one-half of residents gave a rating of 6 or 7. The response breakdown shows 21% of respondents provided a 7 rating, 29% provided a 6 rating, 25% chose 5, and 20% selected 4. Only 4% selected 3 or lower.
- Those who provide a rating of 6 and under were asked the reason for their rating:
  - Rating of 6: top reasons include visitors help/support our economy/ local economy/ are good for businesses/local businesses (39%), tourism is a major part of our economy/local economy (16%), they bring financial benefits/ tourism brings money (13%), and we need tourism/ it helps the tourism sector (10%).
  - Ratings of 4 or 5: top reasons are visitors help/support our economy/local economy/are good for businesses/local businesses (15%), no reason/just the right rating (8%), they could be annoying/they bring crowd/ change the fabric of the community (8%), depends on why they are here/ who they are/ tourist could be disruptive (7%) and I feel neutral/indifferent (7%).
  - Ratings of 1 to 3: top reasons include I don't value them/ don't care about visitors/ no direct benefit for me (27%), more tourism wouldn't benefit/help my community/the economy (22%), they could be annoying/ they bring crowd/ change the fabric of the community (13%), and no reason/just the right rating (10%).

# TRAVEL INTENT

# Tracking British Columbians' Travel Intent Within Next 4 Weeks

(By Destination)

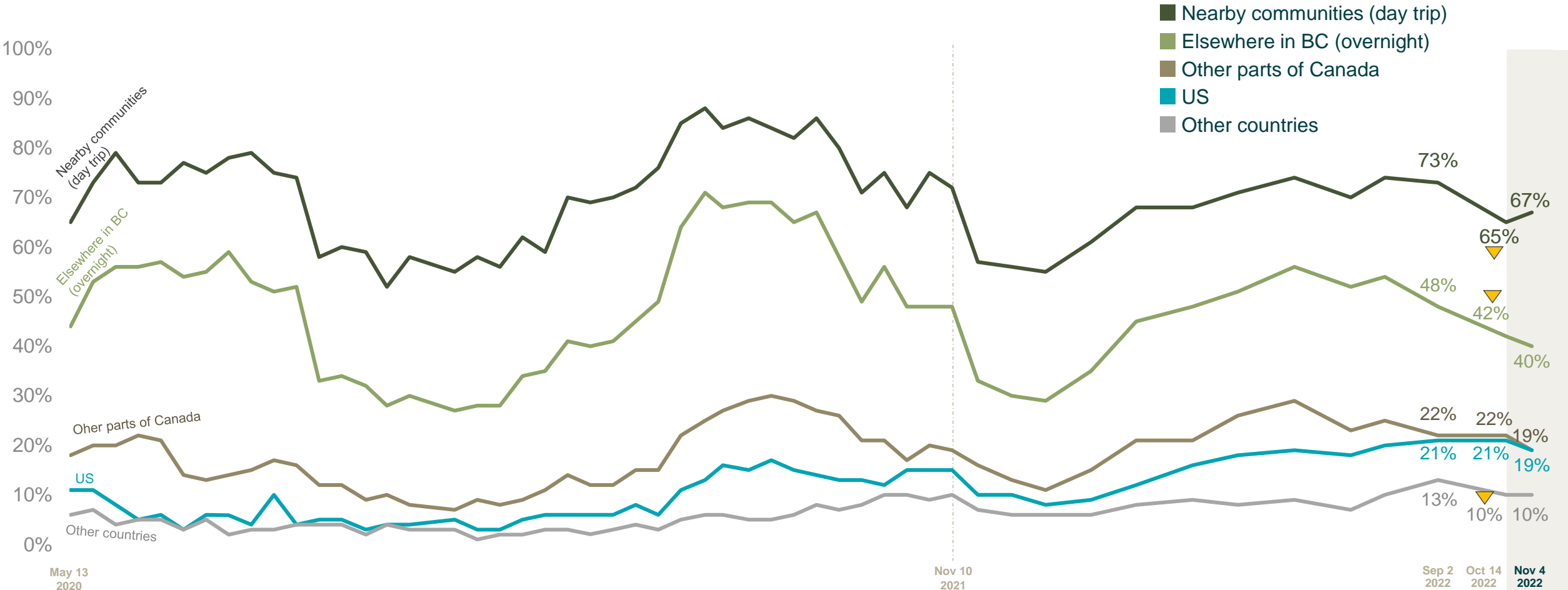


NOTE: Response category “only when vaccine or treatment for COVID-19 available” removed Jun 23, 2021.  
Base: All respondents  
D3. When, if at all, are you likely to make trips to the following destinations?

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

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

(By Destination)



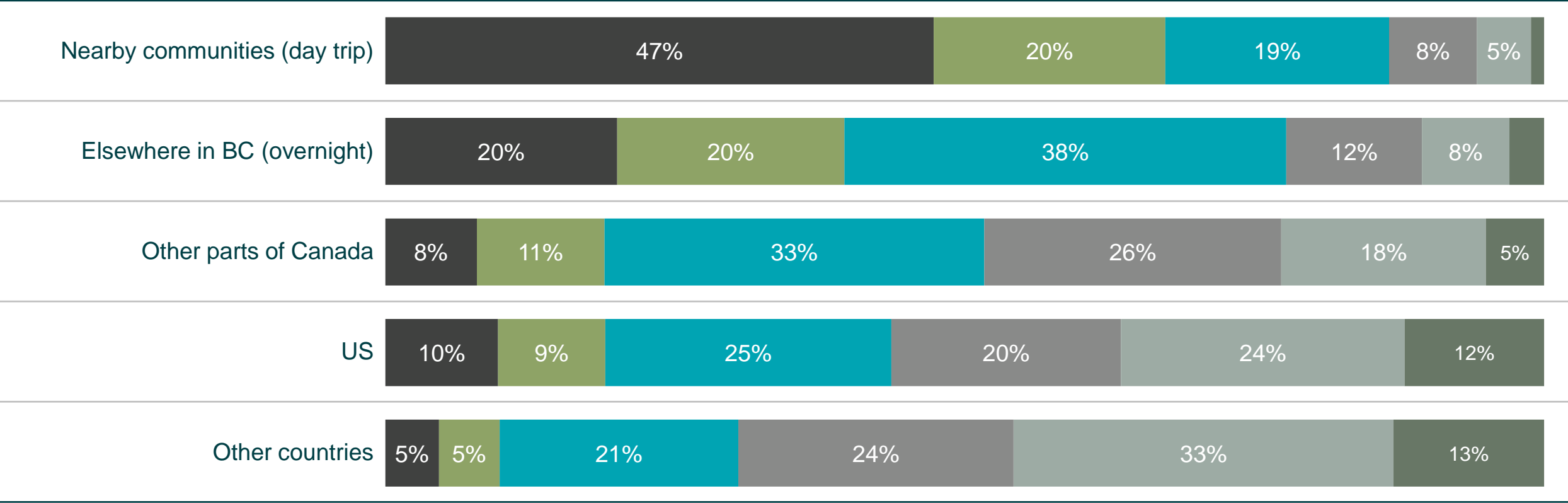
NOTE: Response category "only when vaccine or treatment for COVID-19 available" removed Jun 23, 2021.  
Base: All respondents  
D3. When, if at all, are you likely to make trips to the following destinations?  
Due to rounding, the total may not equal 100% to the sum of individual values shown.

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



# Snapshot Of British Columbians' Travel Intentions

(Wave 52 – November 4, 2022)

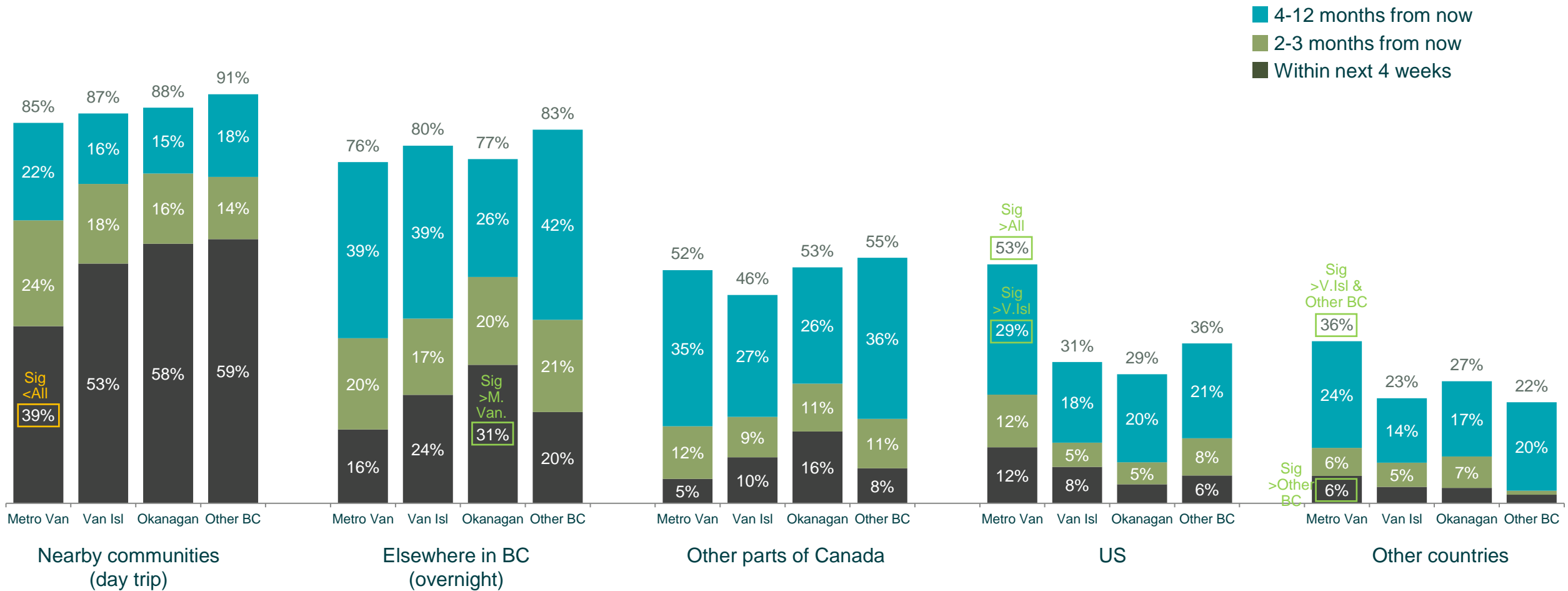


■ Within next 4 weeks ■ 2-3 months from now ■ 4-12 months from now ■ Within 2 years ■ Not sure, but longer than 2 years ■ Never

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 52 – November 4, 2022)



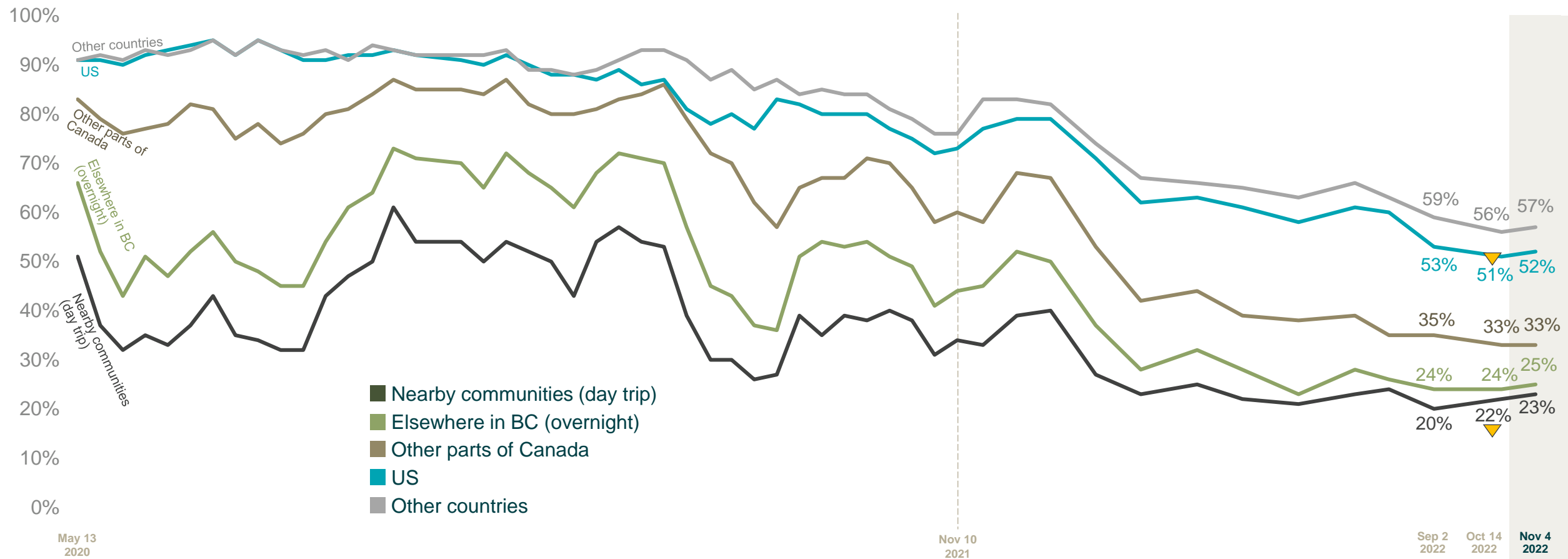
Base: All respondents  
D3. When, if at all, are you likely to make trips to the following destinations?  
Due to rounding, the sum of the individual values shown may not add up to the total shown.

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)



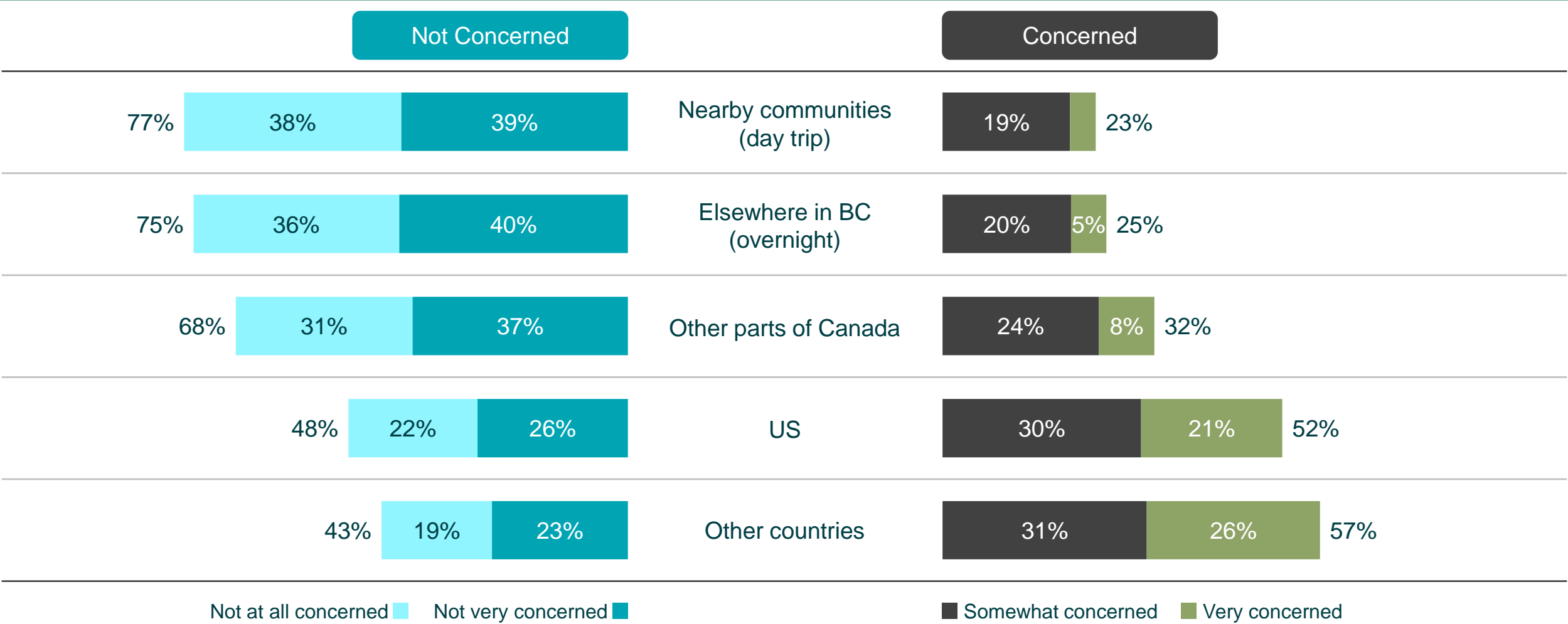
Base: All respondents  
D2. Given the current situation with COVID-19, how concerned would you be with the following types of visitors making non-essential trips into your community over the next few weeks?

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



# Snapshot Of British Columbians' Concern Welcoming Visitors

(Wave 52 – November 4, 2022)

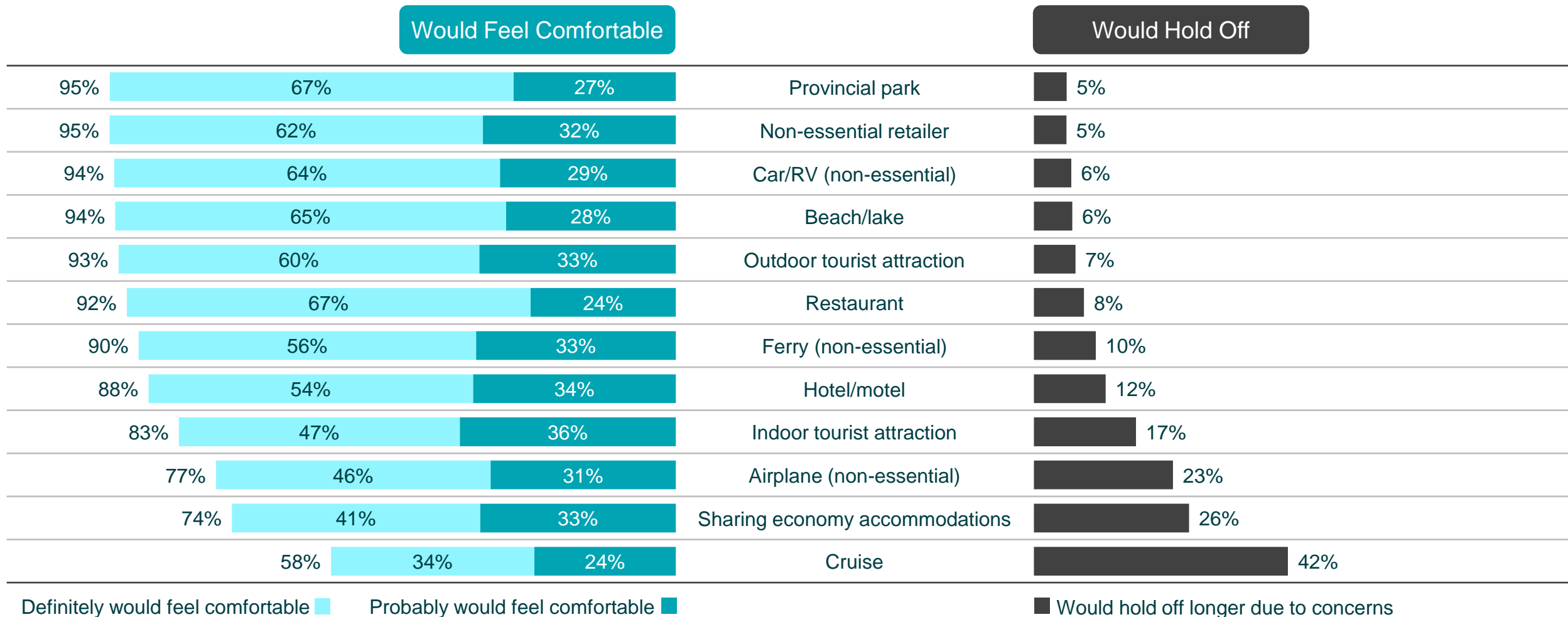


Base: All respondents  
D2. Given the current situation with COVID-19, how concerned would you be with the following types of visitors making non-essential trips into your community over the next few weeks?  
Due to rounding, the sum of the individual values shown may not add up to the total shown.

# COMFORT LEVELS BY ACTIVITY / TRANSPORTATION / ACCOMMODATION

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

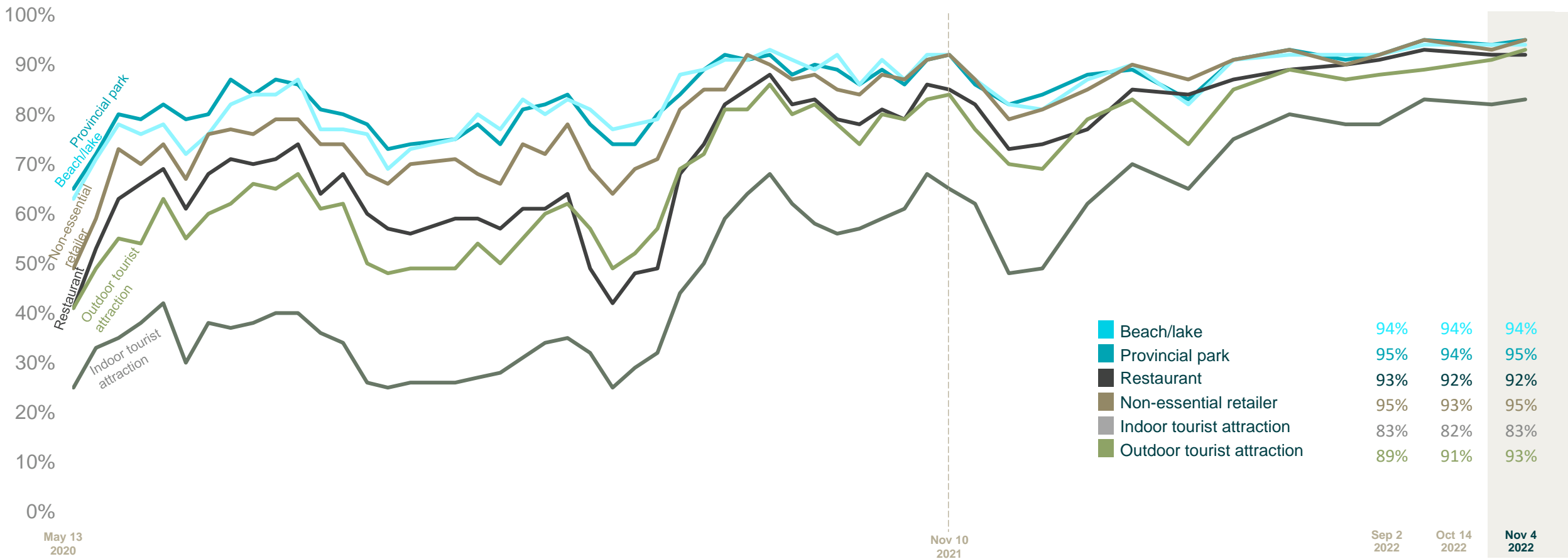
(Wave 52 – November 4, 2022)



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)



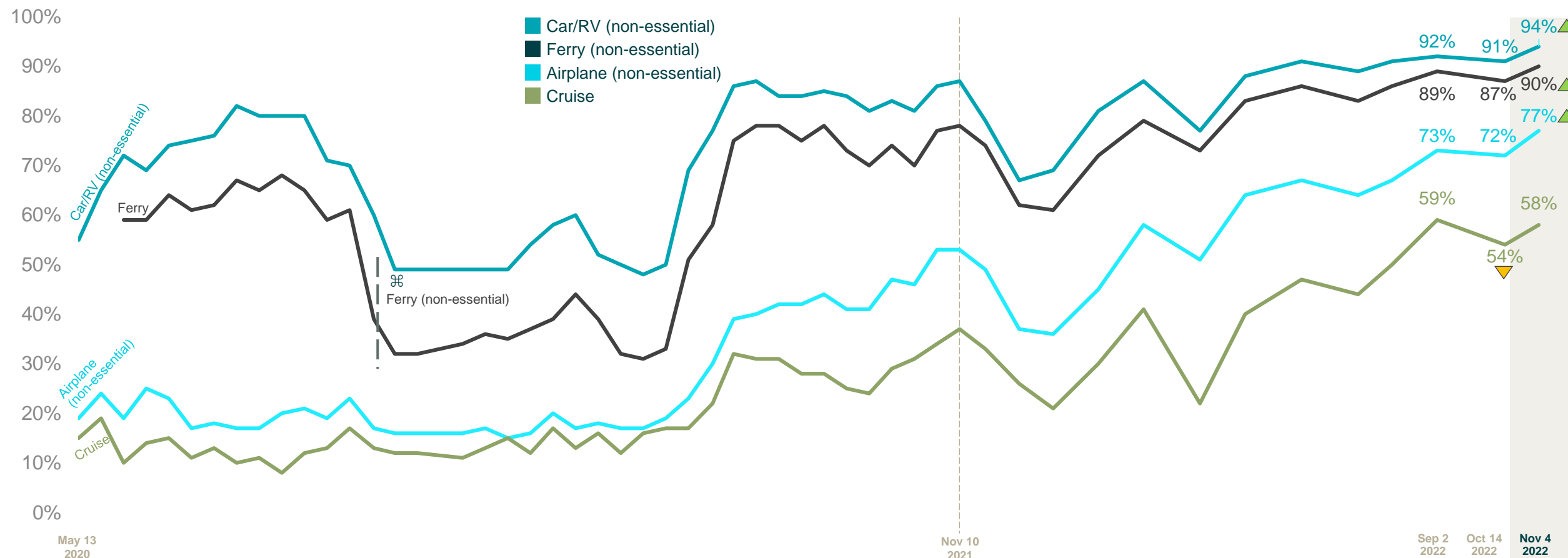
Base: All respondents, excluding not applicable/don't do this in general and not applicable/wouldn't do this at this time of year  
D1. Would you be comfortable doing/using each of the following in the next few weeks, or are you be likely to hold off longer due to concerns about COVID-19?

▲ 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)

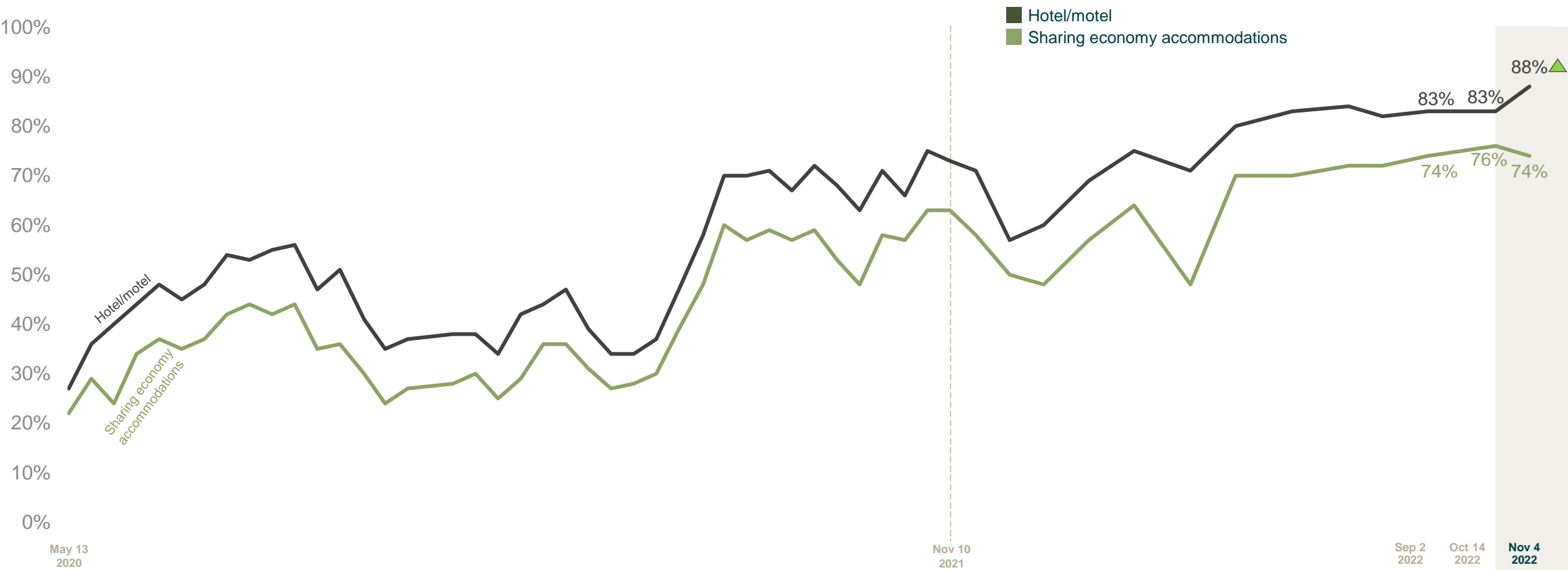


⌘ Changed from “ferry” to “ferry for non-essential travel” November 12, 2020 wave.  
Base: All respondents, excluding not applicable/don't do this in general and not applicable/wouldn't do this at this time of year  
D1. Would you be comfortable doing/using each of the following in the next few weeks,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



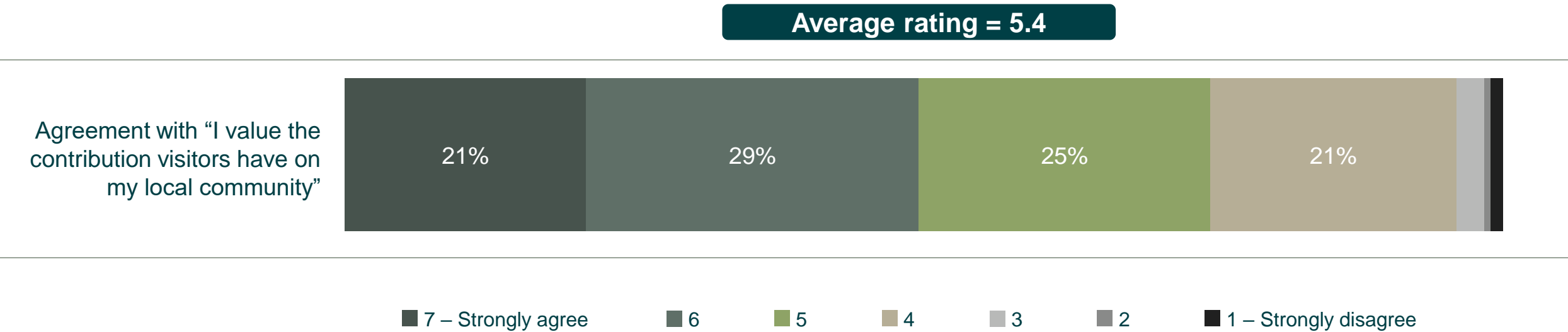
Base: All respondents, excluding not applicable/don't do this in general and not applicable/wouldn't do this at this time of year  
D1. Would you be comfortable doing/using each of the following in the next few weeks, or are you be likely to hold off longer due to concerns about COVID-19?

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

# CURRENT AD-HOC FINDINGS

# Valuing Visitors' Contribution to Local Community

(Wave 52 – November 4, 2022)





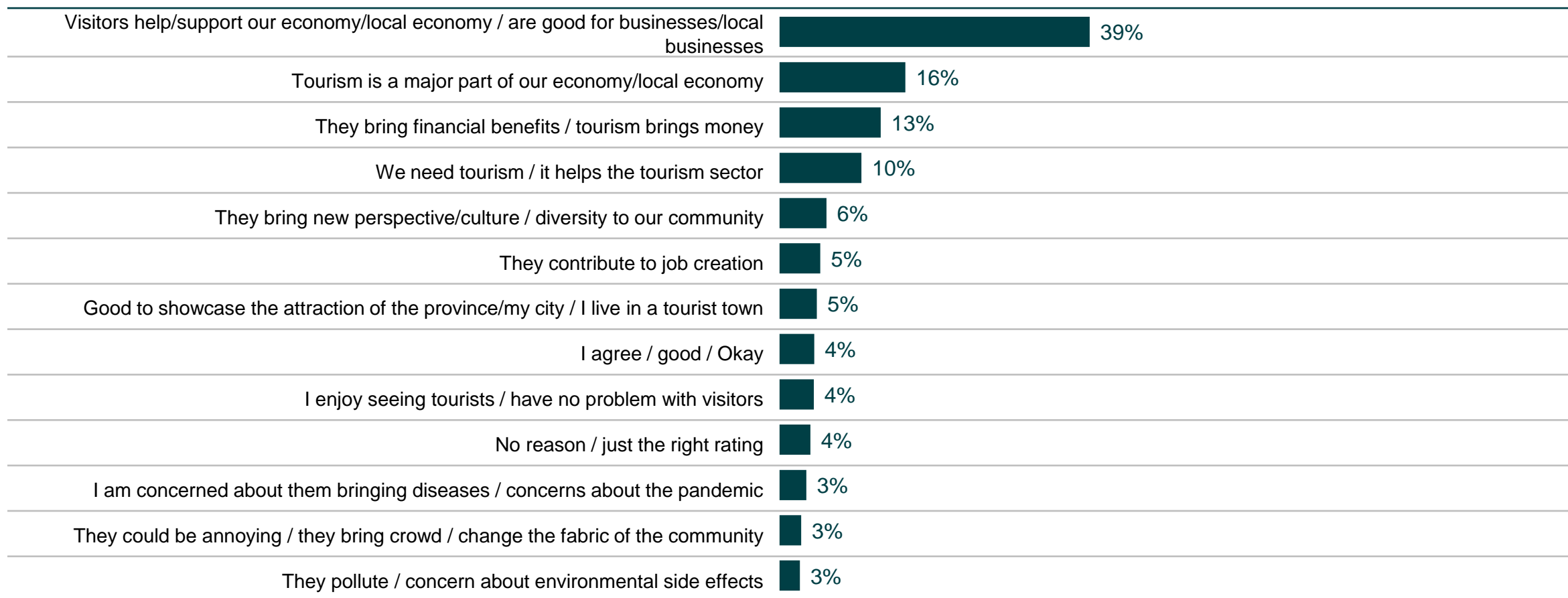
# Valuing Visitors' Contribution on Local Economy: Reasons for 6 out of 7 rating

(Wave 52 – November 4, 2022)



## Reasons for 6 out of 7 rating

(n=302)



\*Note: Responses 3% and greater are shown.  
 Base: 288 Respondents  
 BCD4B. Why did you give a rating of 6 out of 7 (Strongly Agree) to the previous question?

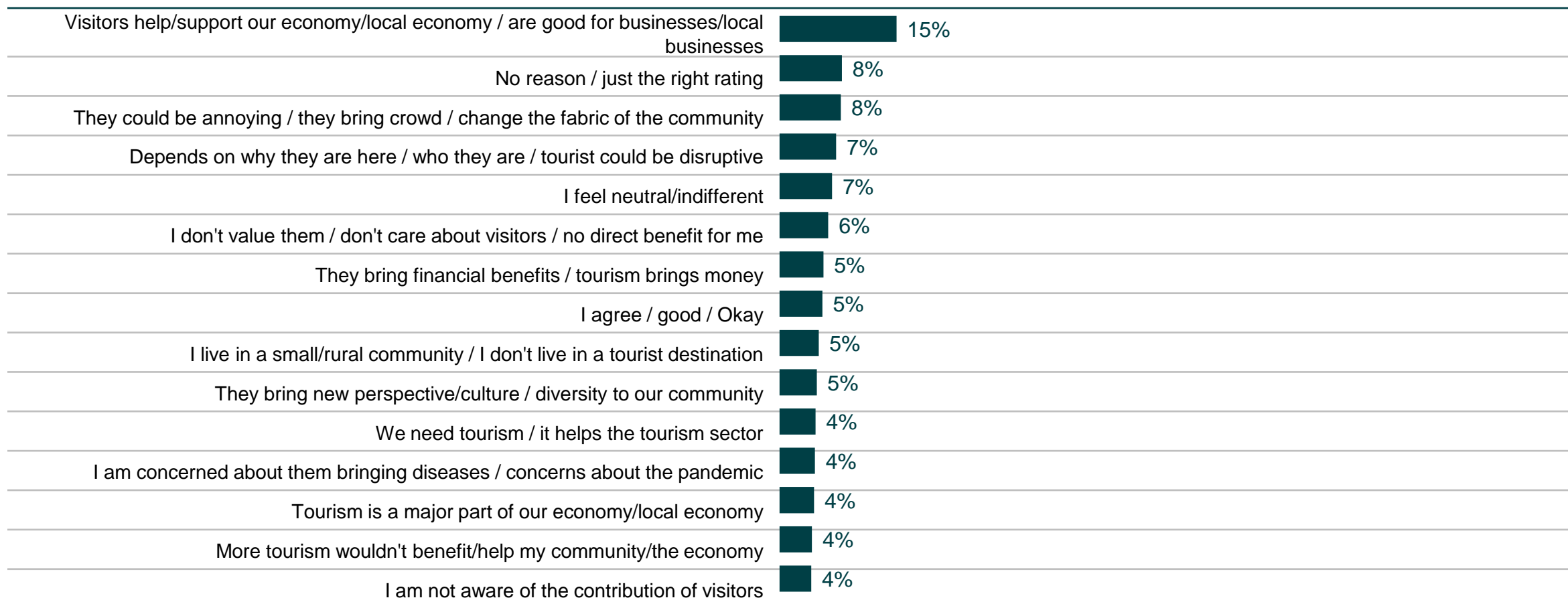
# Valuing Visitors' Contribution on Local Economy: Reasons for 4 or 5 out of 7 rating

(Wave 52 – November 4, 2022)



## Reasons for 4 or 5 out of 7 rating

(n=465)



\*Note: Responses 4% and greater are shown.

Base: 466 Respondents

BCD4B: Why did you give a rating of 4 or 5 out of 7 (Strongly Agree) to the previous question?

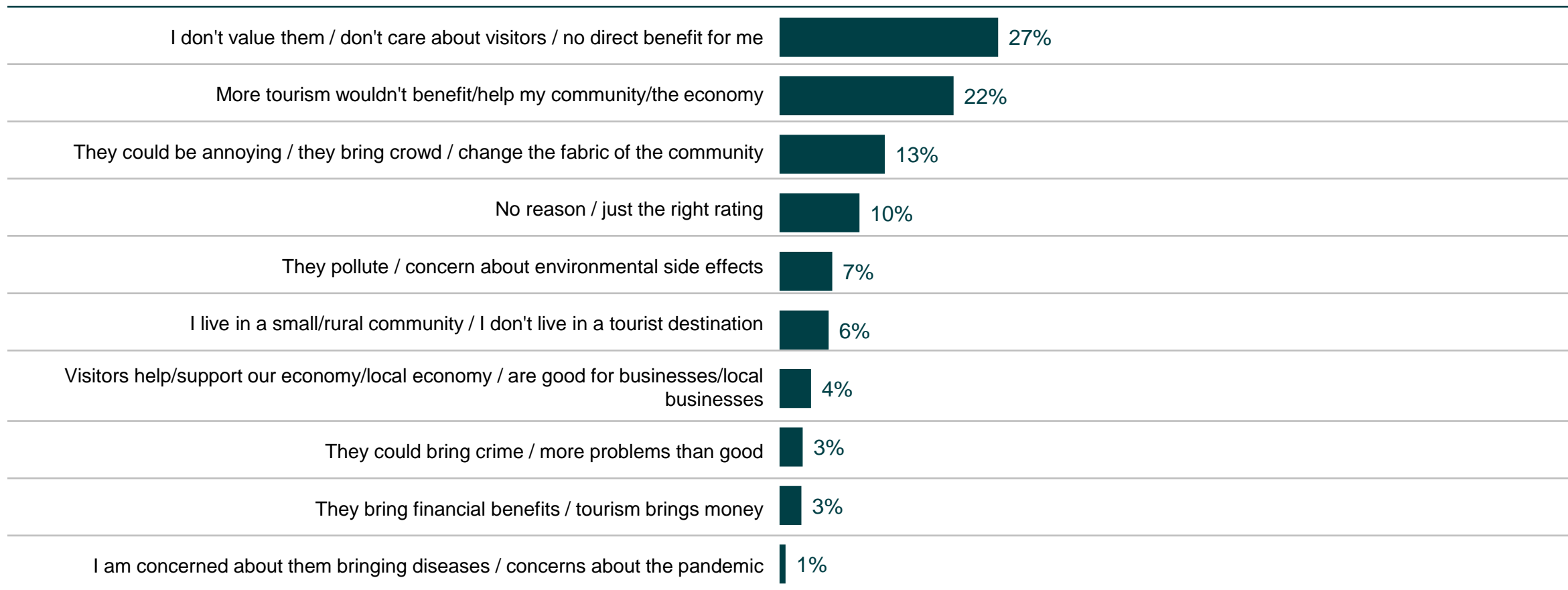
# Valuing Visitors' Contribution on Local Economy: Reasons for 1 to 3 out of 7 rating

(Wave 52 – November 4, 2022)



## Reasons for 1 to 3 out of 7 rating

(n=41)



# APPENDIX: METRICS BY DEMOGRAPHICS

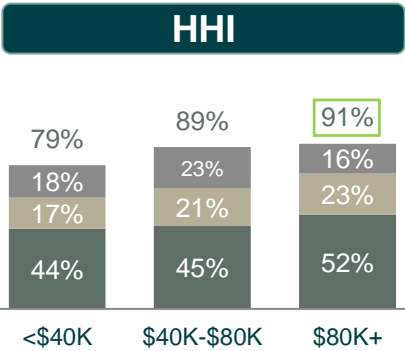
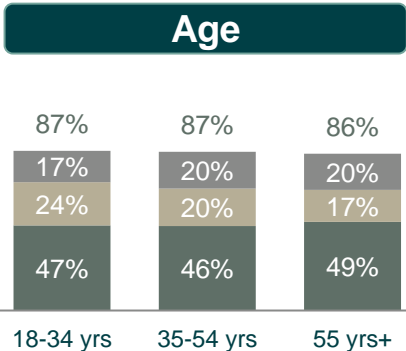
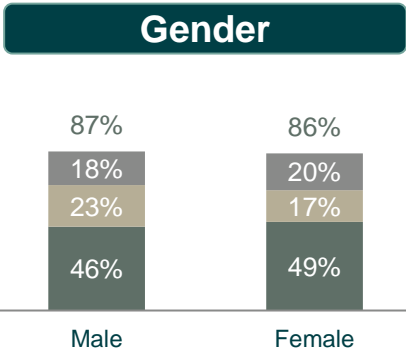
# Snapshot Of British Columbians' Travel Intent By Demographics

(Wave 52 – November 4, 2022)

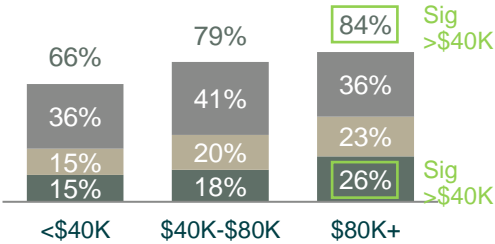
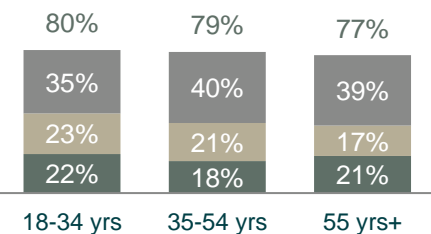
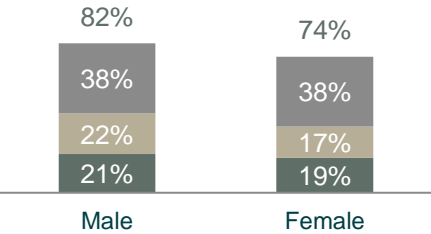


- 4-12 months from now
- 2-3 months from now
- With next 4 weeks

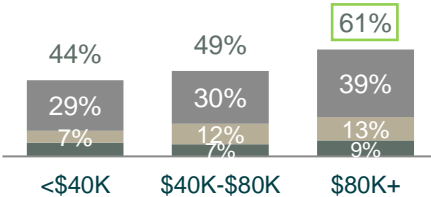
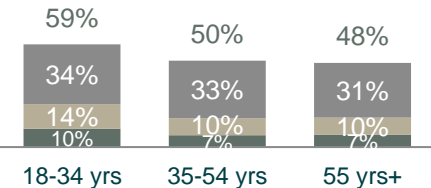
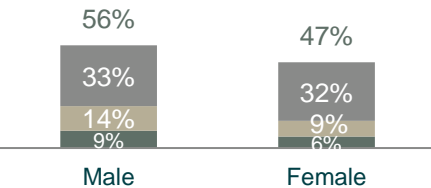
Nearby communities  
(day trip)



Elsewhere in BC  
(overnight)



Other  
parts of Canada

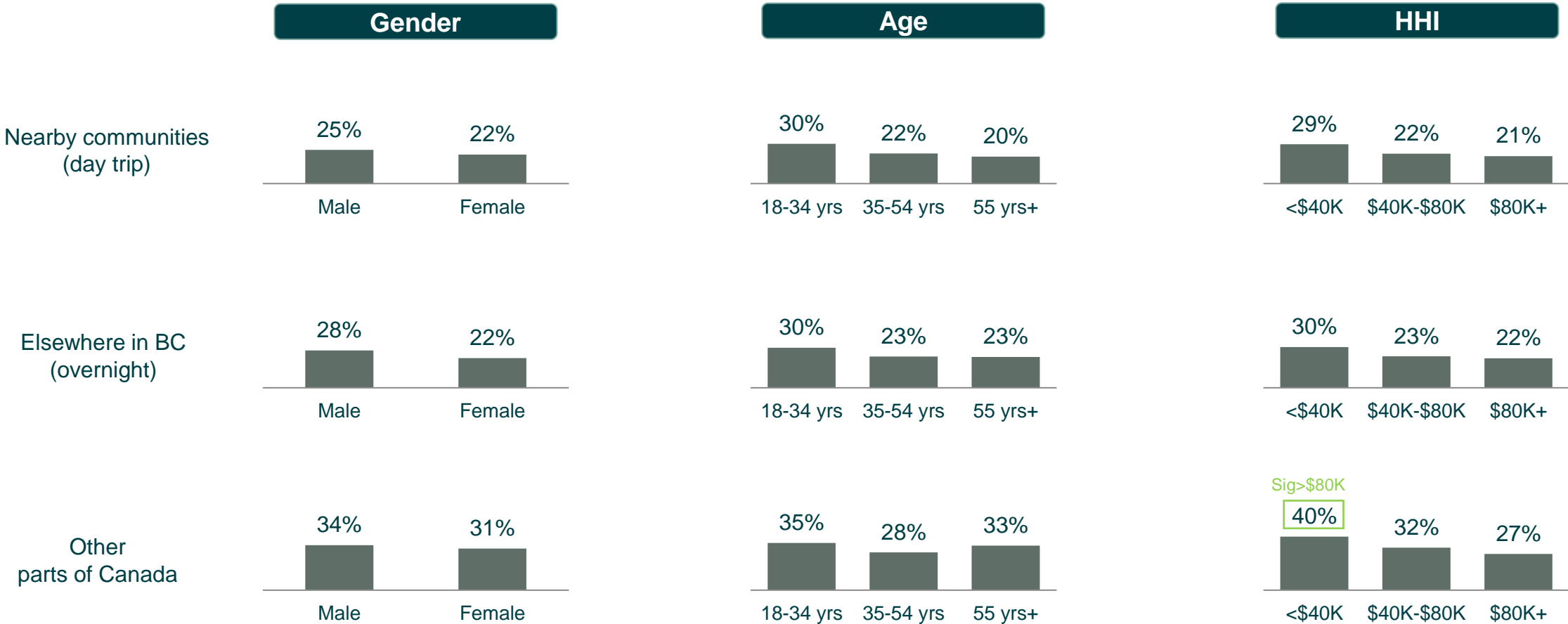


Base: All respondents  
D3. When, if at all, are you likely to make trips to the following destinations?  
Due to rounding, the total may not equal 100% to the sum of individual values shown.

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 52 – November 4, 2022)



Sig>\$80K

40%

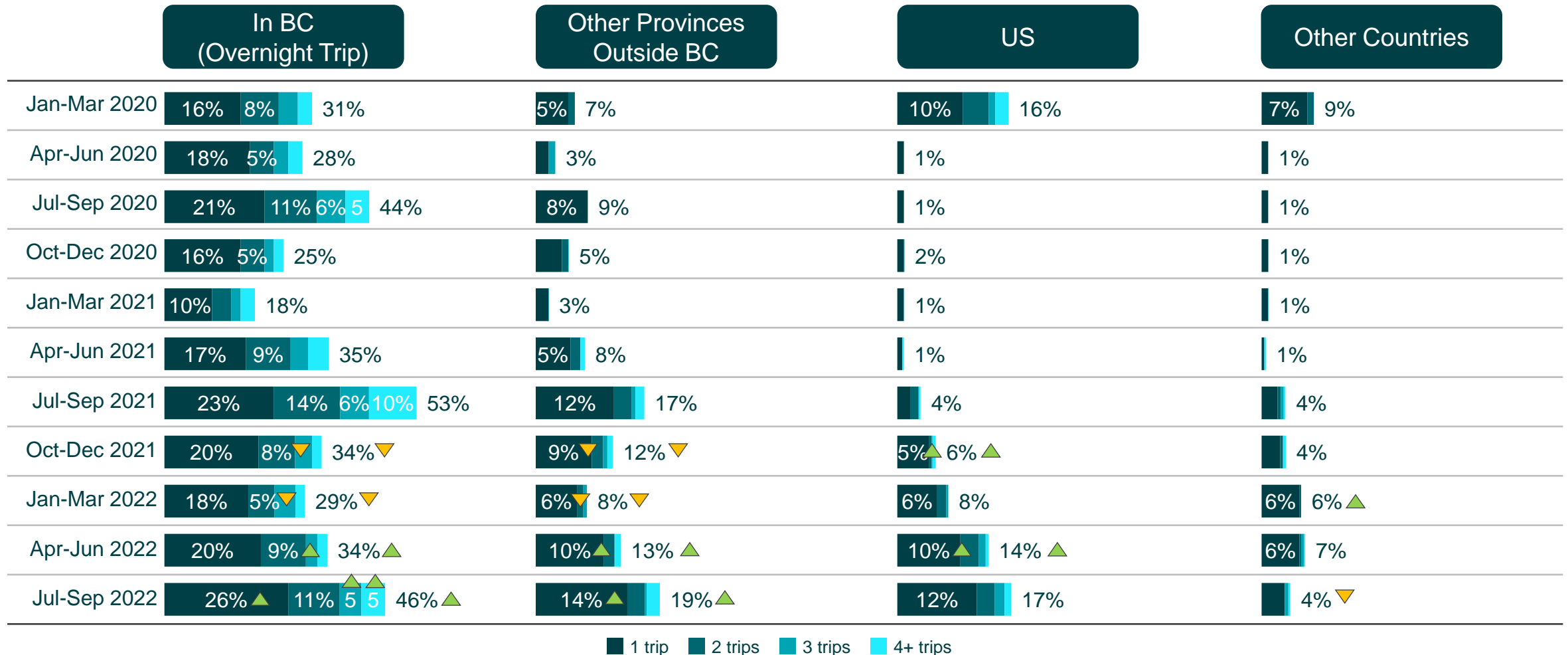
  Statistically significantly **higher** than comparison group(s).  
  Statistically significantly **lower** than comparison group(s).

## APPENDIX: PAST AD-HOC FINDINGS



# Past Travel

(Wave 52 – November 4, 2022)



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.

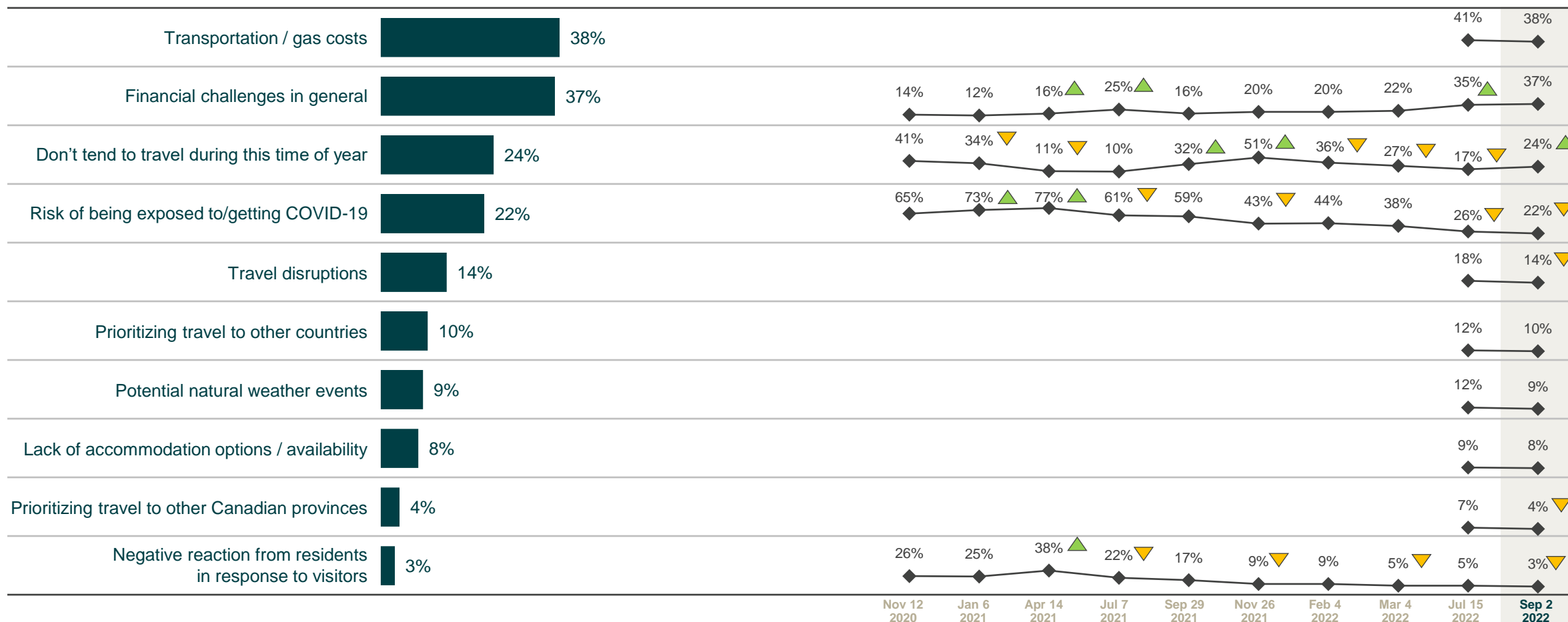
# Reasons For Not Considering Future BC Travel (Aided)

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



September 2, 2022

Tracking



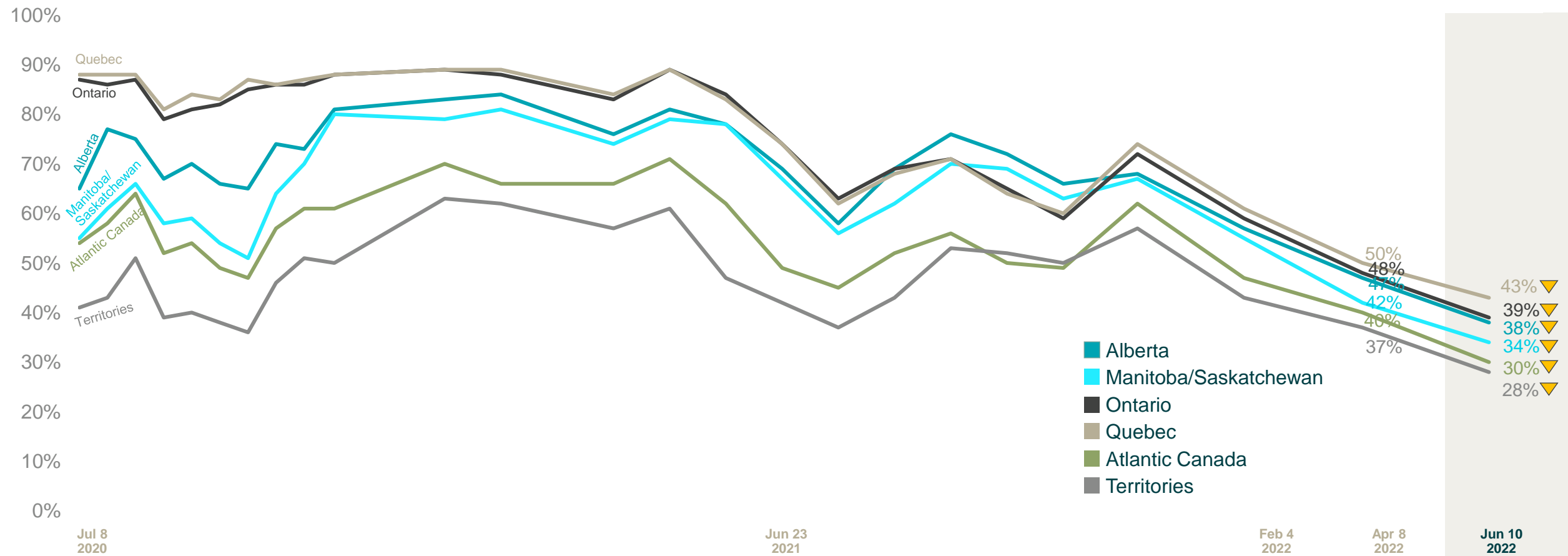
Base: Those who are not likely to take an overnight trip in BC in the next 3 months  
D4new. Why are you not likely to take an overnight trip in BC in the next 3 months?

▲ 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)

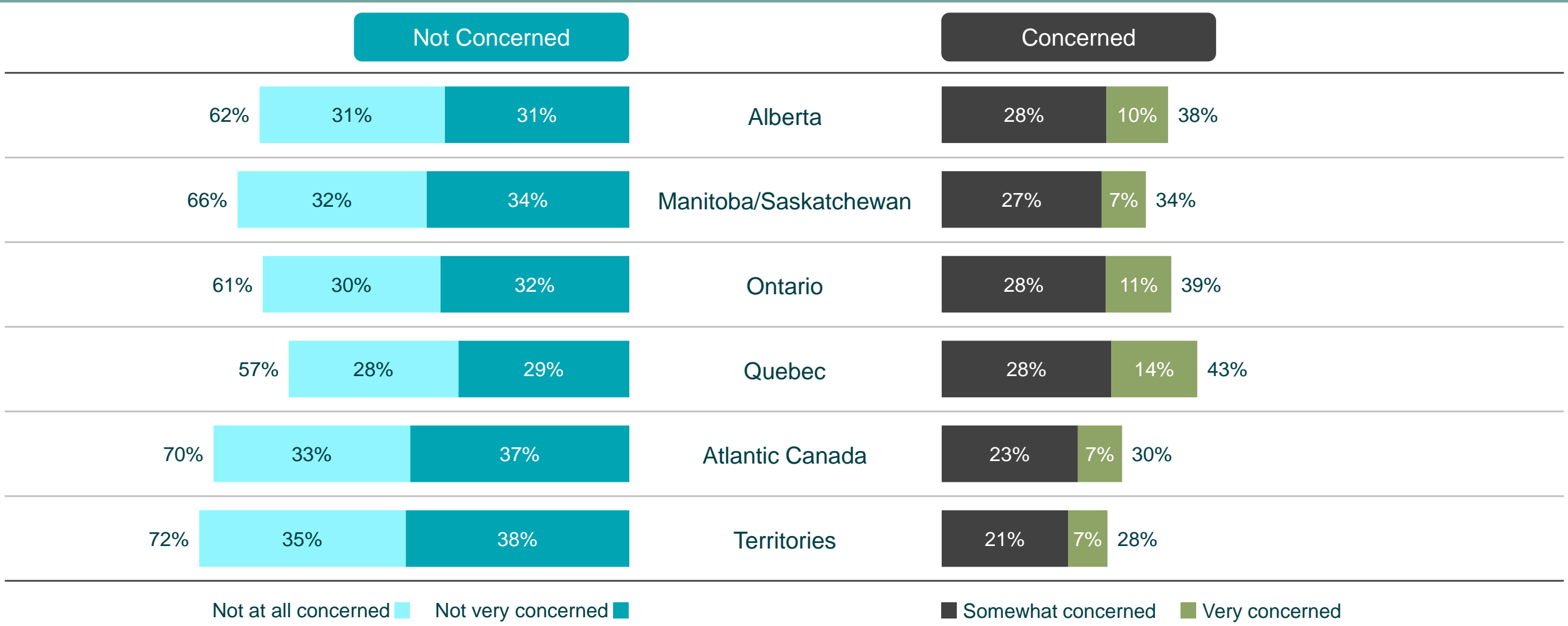


⌘ Question frequency changed from bi-weekly to monthly starting November 12, 2020 and is now asked as needed.  
Base: All respondents  
D2a. And how concerned would you be with the following types of Canadian visitors making non-essential trips into your community over the next few weeks?

▲ 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)



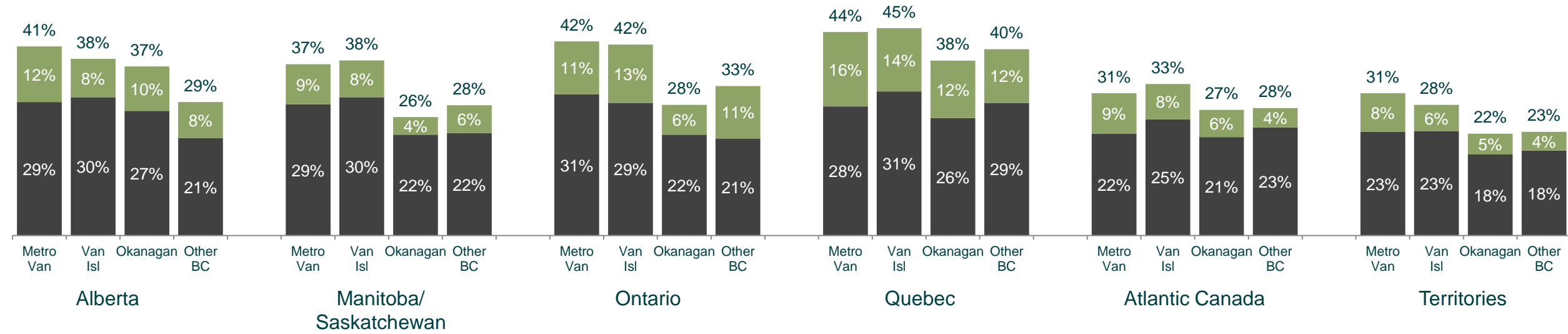
Base: All respondents  
D2a. And how concerned would you be with the following types of Canadian visitors making non-essential trips into your community over the next few weeks?  
Due to rounding, the sum of the individual values shown may not add up to the total shown.

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

(Wave 48 – July 15, 2022)



Very concerned  
Somewhat concerned

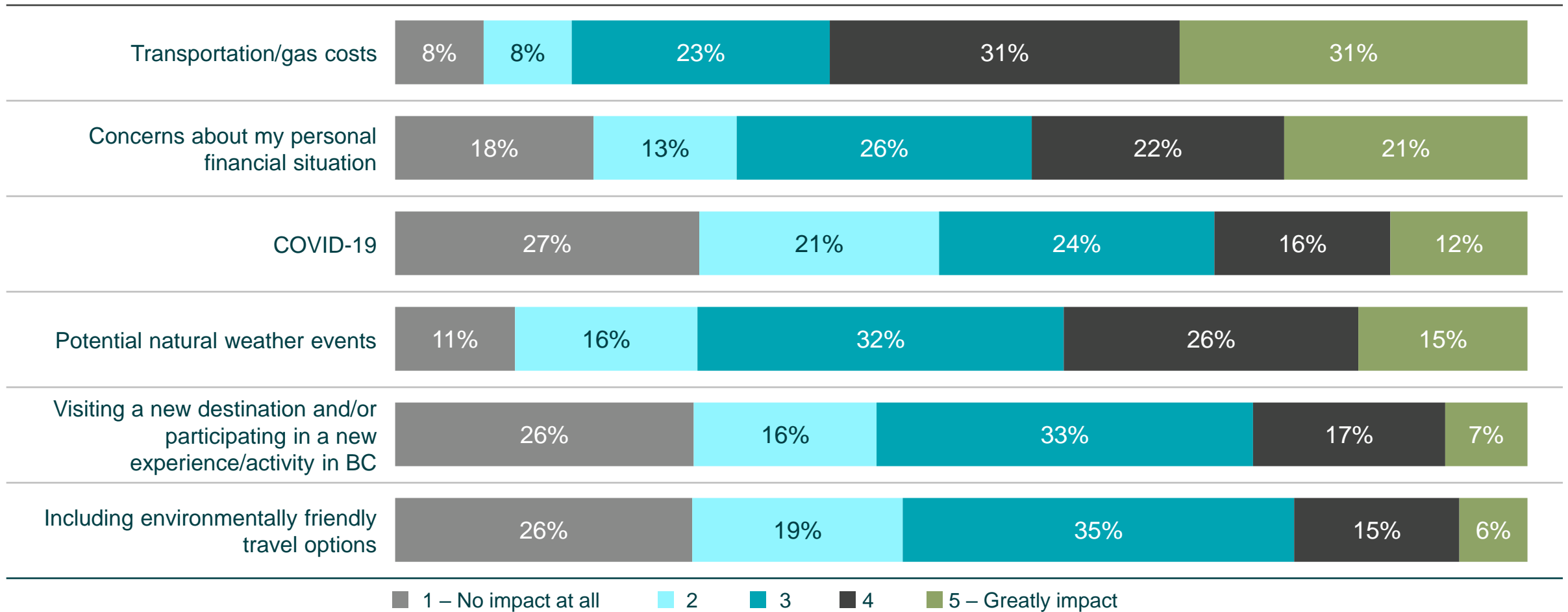


Base: All respondents  
D2a. And how concerned would you be with the following types of Canadian visitors making non-essential trips into your community over the next few weeks?  
Due to rounding, the sum of the individual values shown may not add up to the total shown.

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

# Impact of Factors on Overnight Travel in BC this Summer

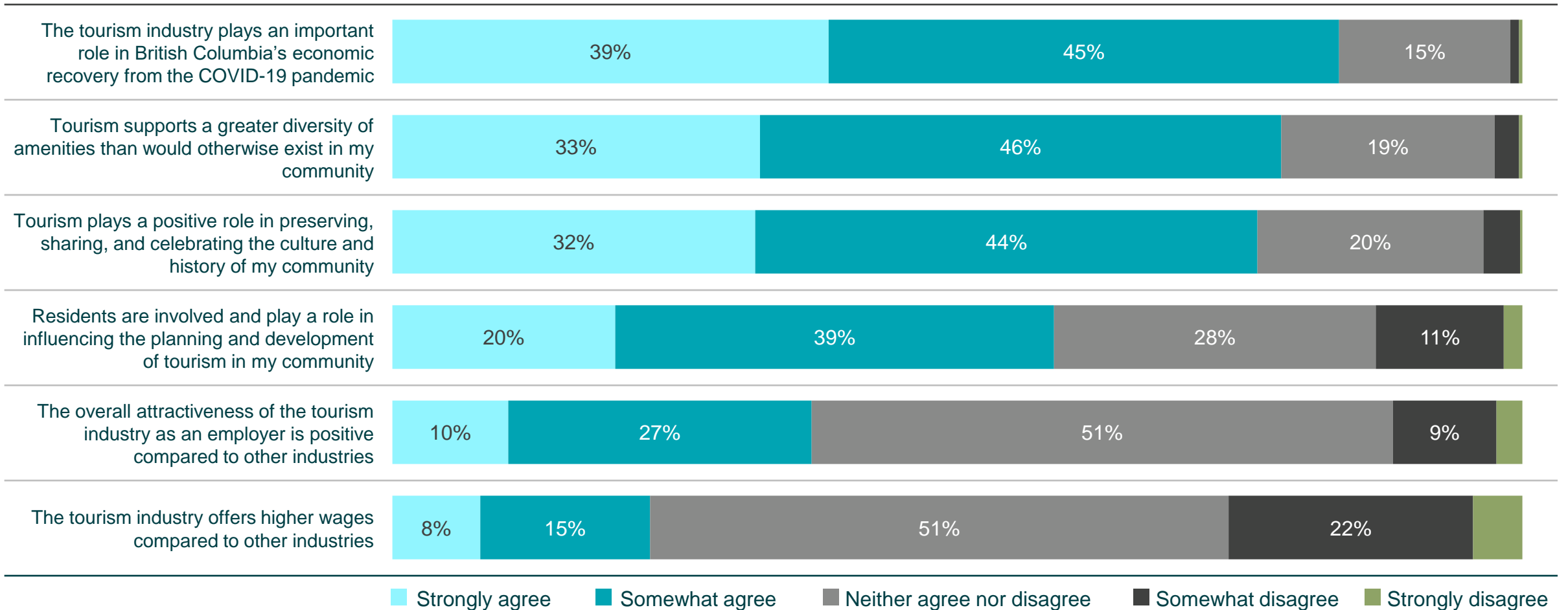
(Wave 47 – June 10, 2022)



■ 1 – No impact at all ■ 2 ■ 3 ■ 4 ■ 5 – Greatly impact

# Importance of Tourism

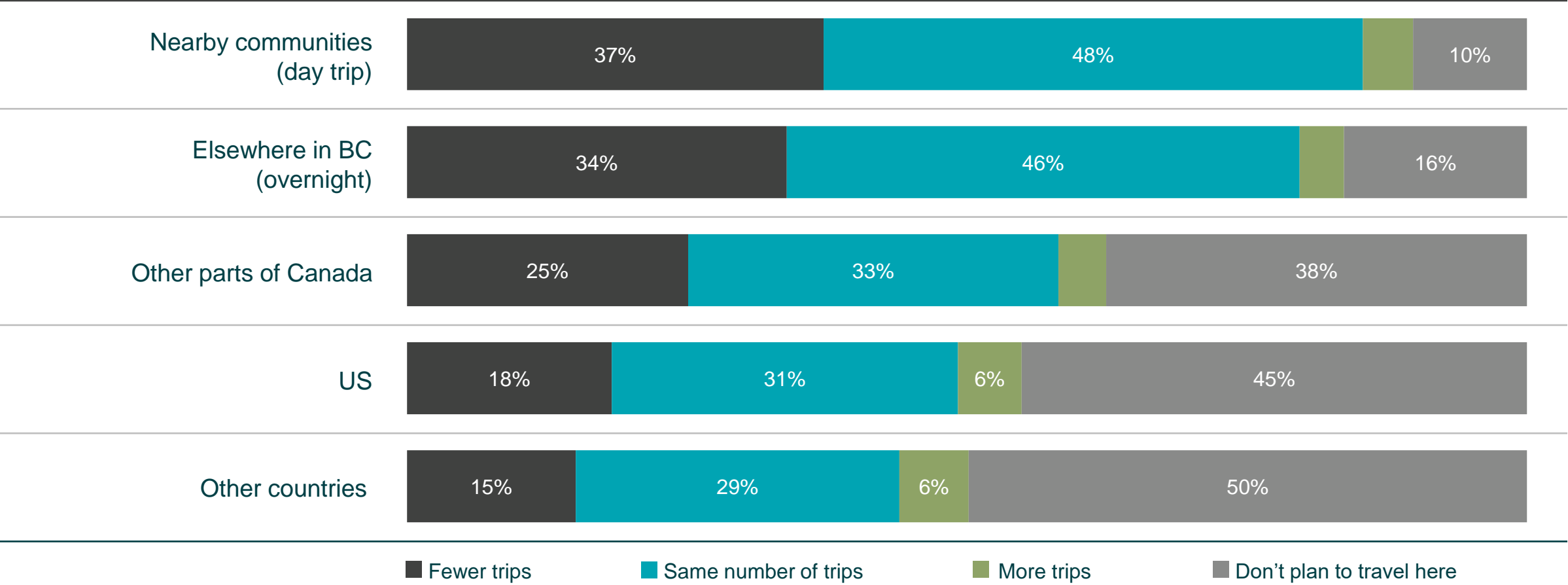
(Wave 45 – Apr 8, 2022)





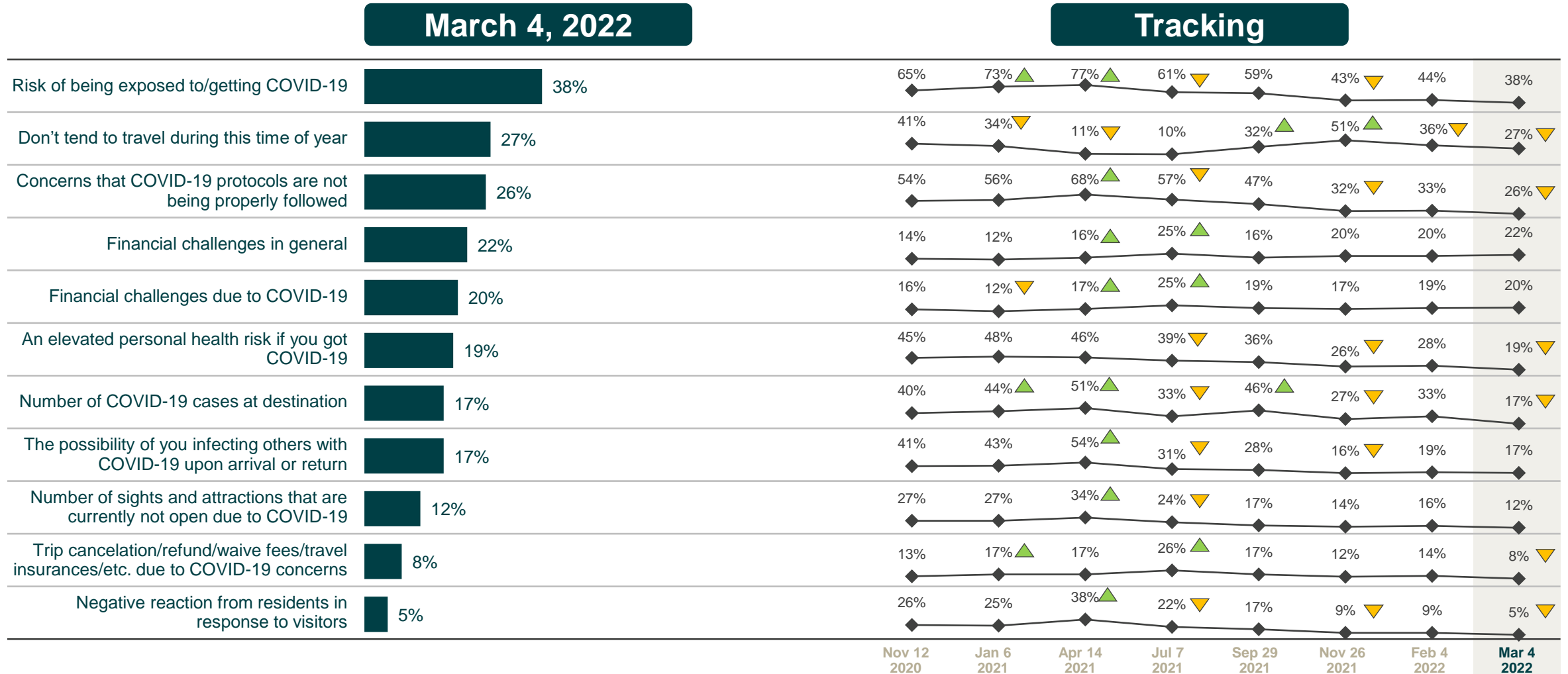
# Impact of Gas Prices on Spring/Summer Travel Intentions

(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)



# 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%

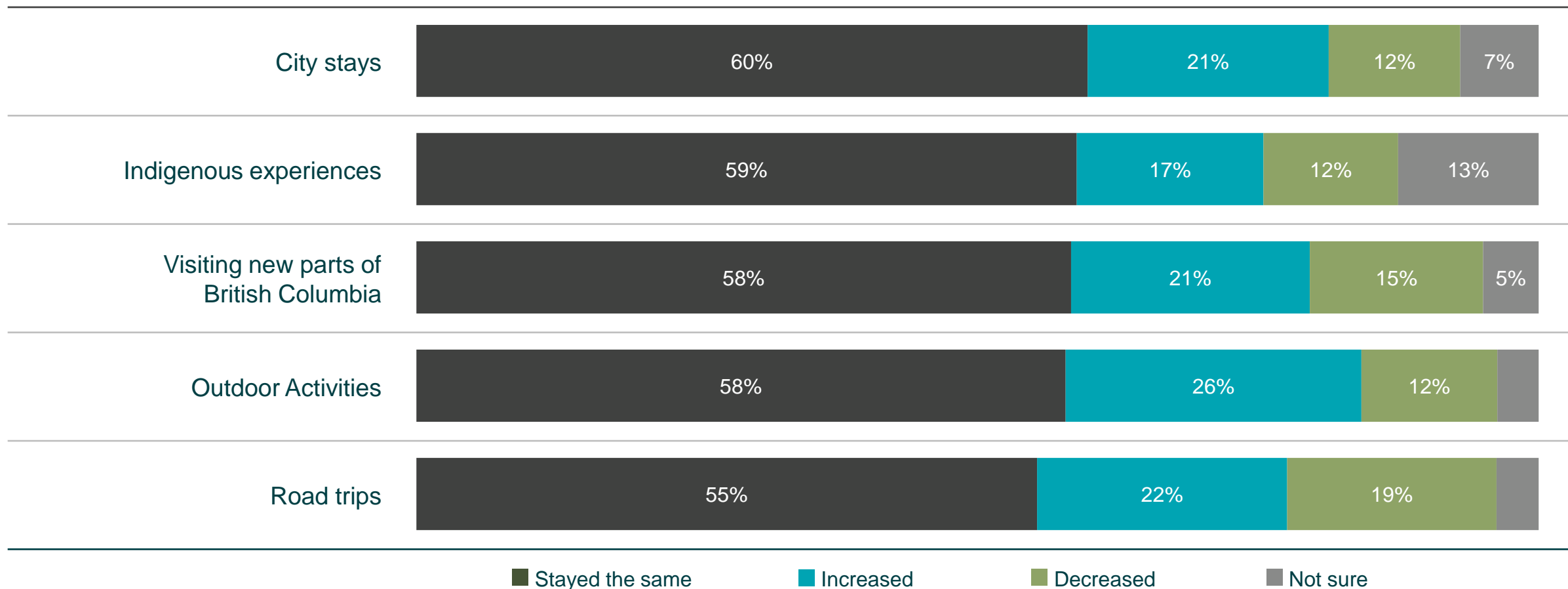
I hope there is more tourism to my community than there was prior to the pandemic 22%

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

Not sure 19%

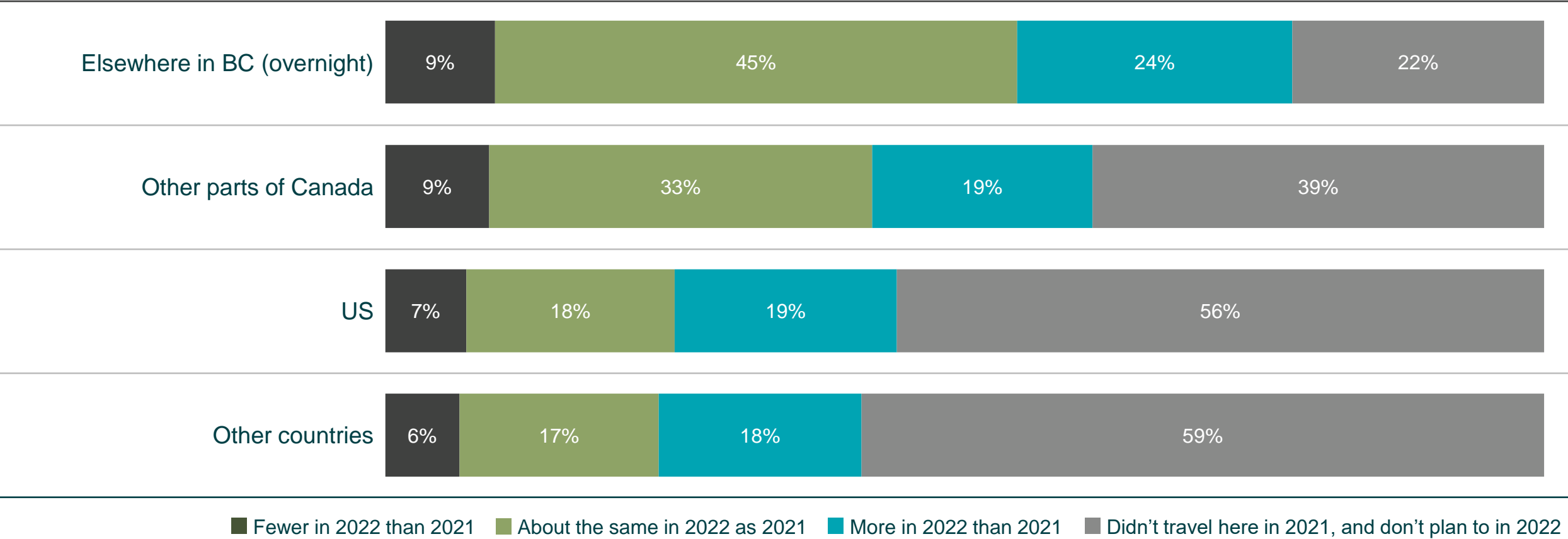
# Interest in BC Activities/Experiences Compared to Two Years Ago

(Wave 44 – Mar 4, 2022)



# Likely 2022 Travel Compared to 2021

(Wave 41 – Jan 7, 2022)

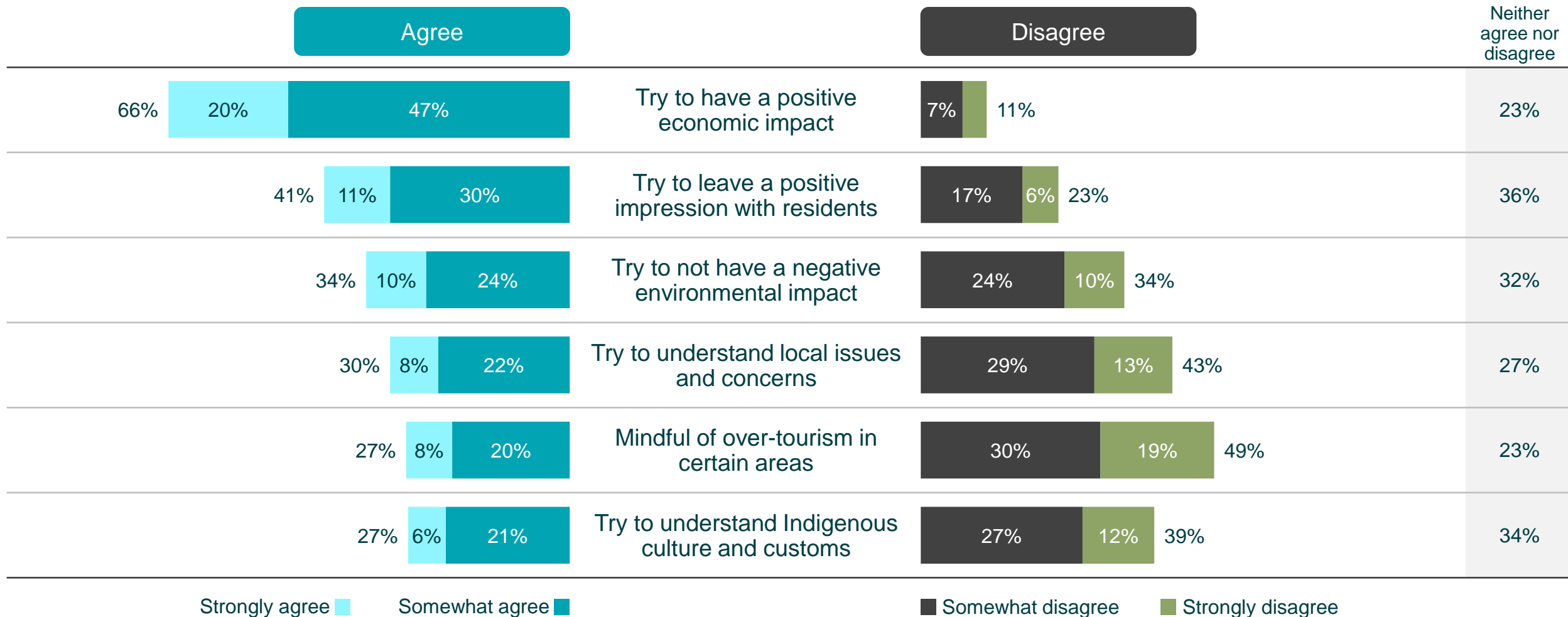


Statistically significantly **higher** than comparison group(s).  
Statistically significantly **lower** than comparison group(s).

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).

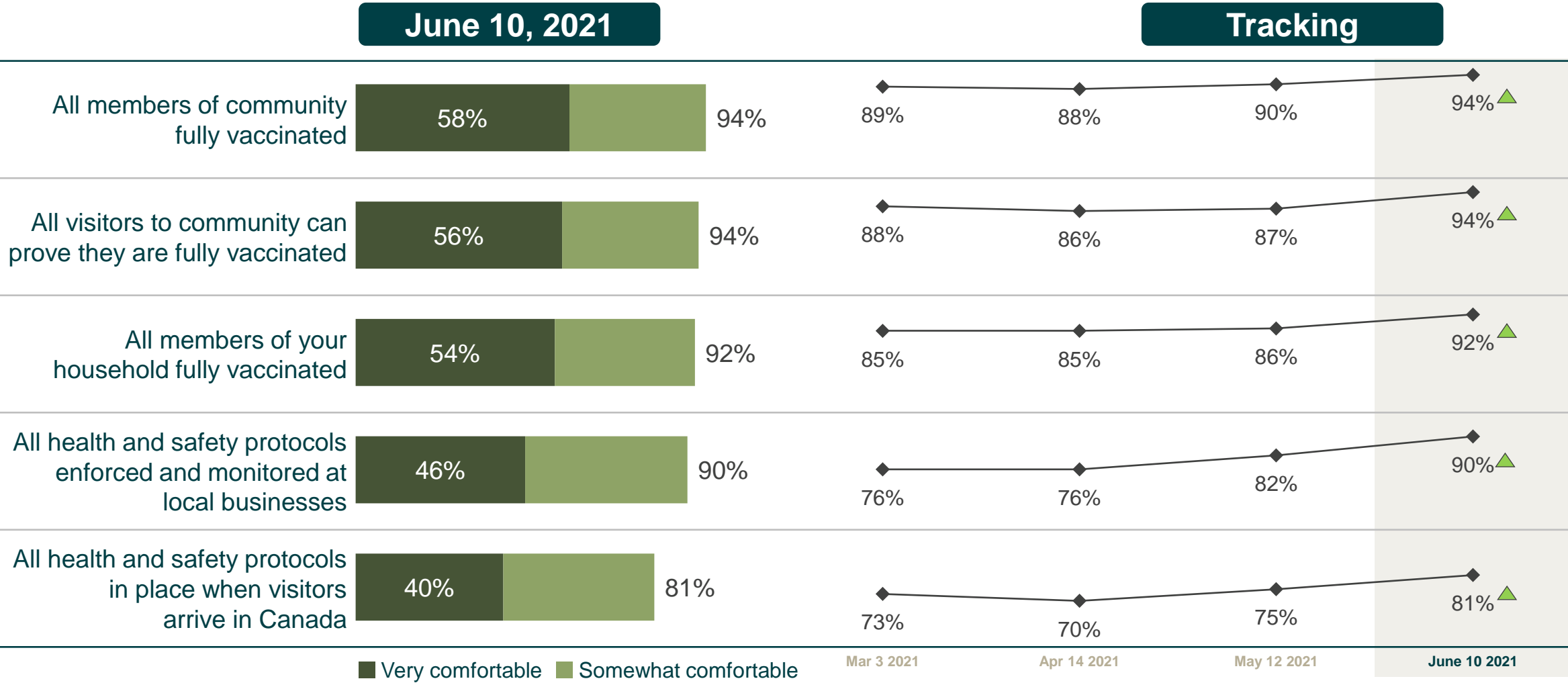
# British Columbians' Views On Visitors

(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

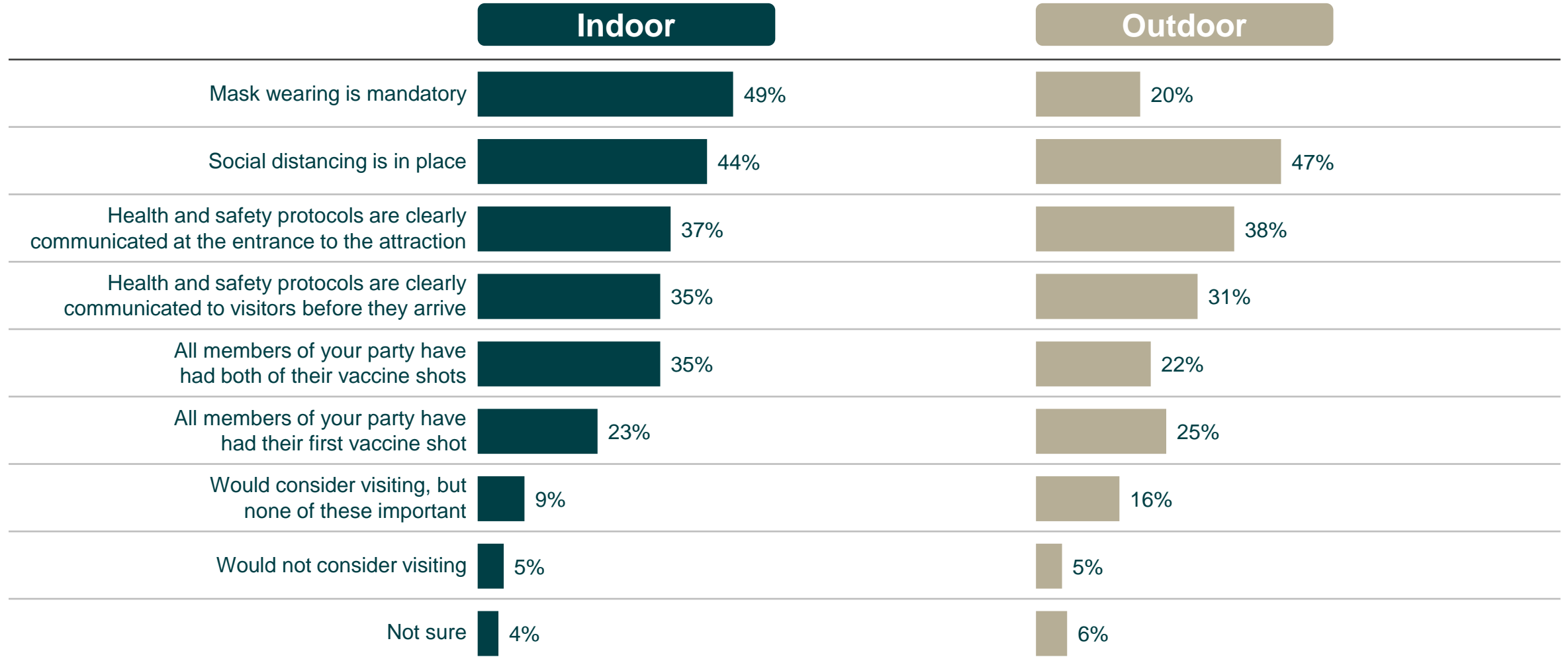


▲ Statistically significantly **higher** than previous wave.  
▼ Statistically significantly **lower** than previous wave.



# Important Circumstances In Visiting BC Attractions (Aided)

(Wave 29 – June 23, 2021)

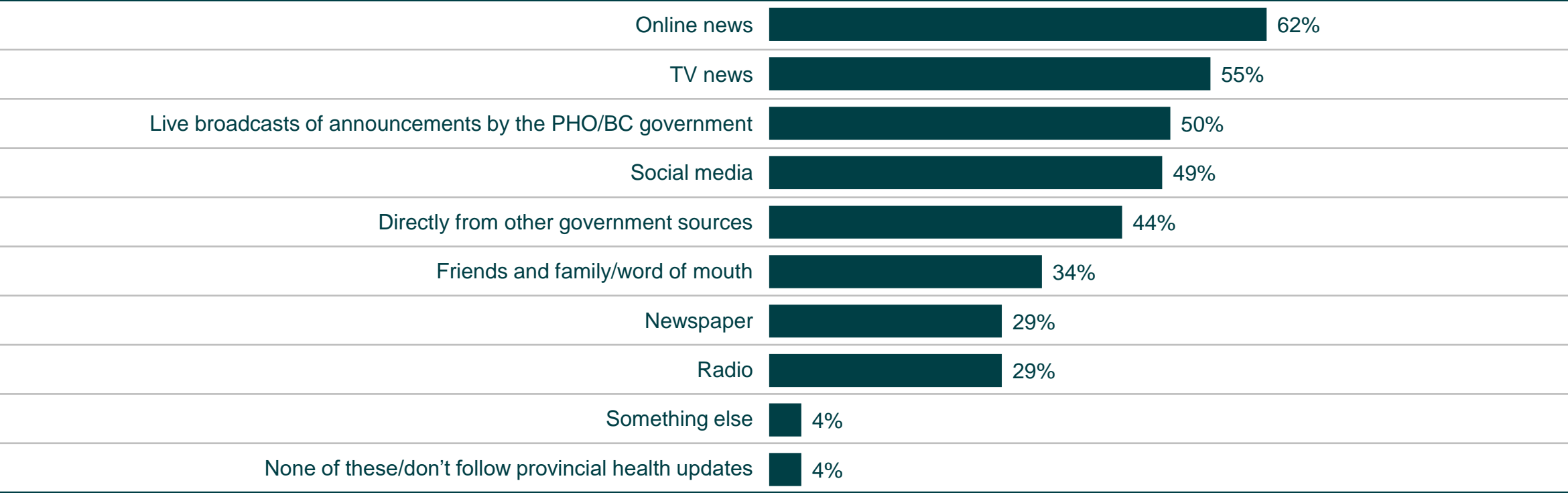


# Source Of Provincial COVID-19 Health Updates

(Wave 21 - March 3, 2021)

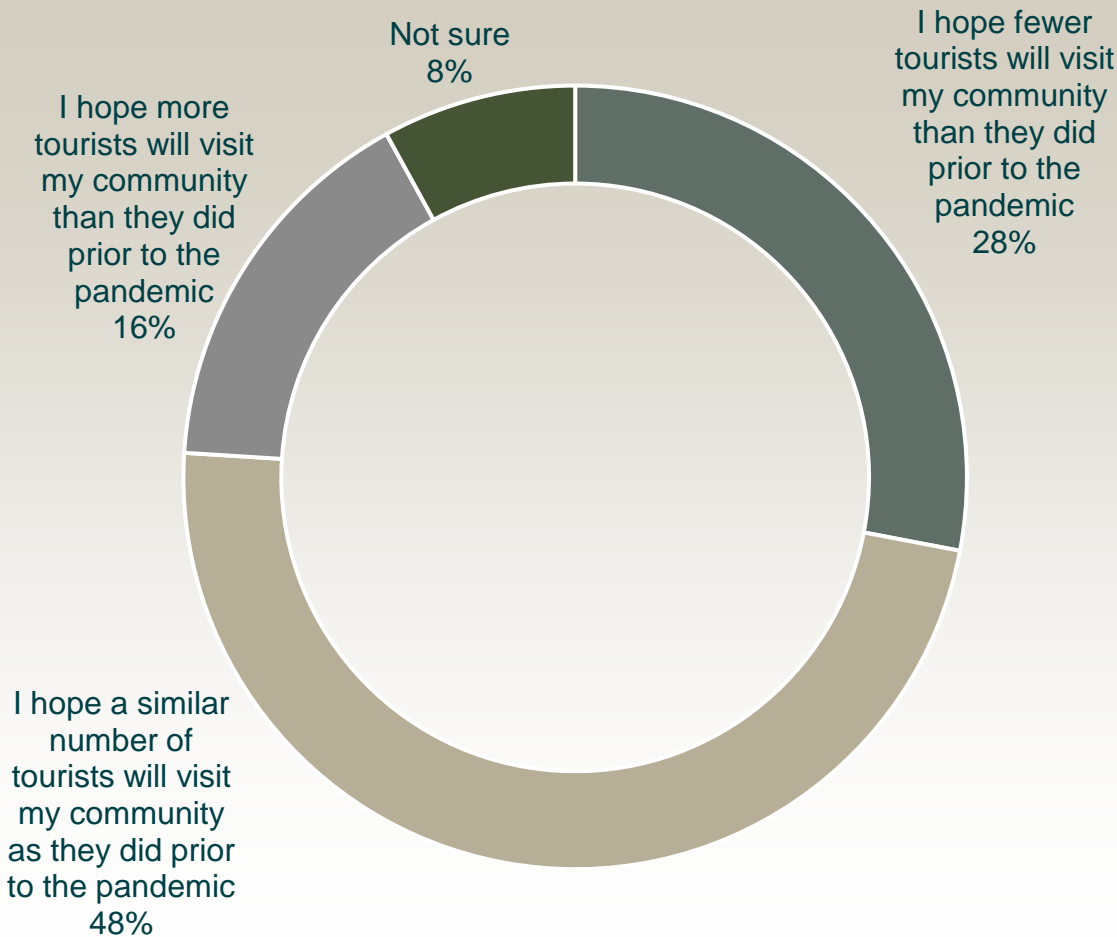


March 3, 2021  
(n=827)



# Preferred Tourism Post-Pandemic

(Wave 27 – May 26, 2021)

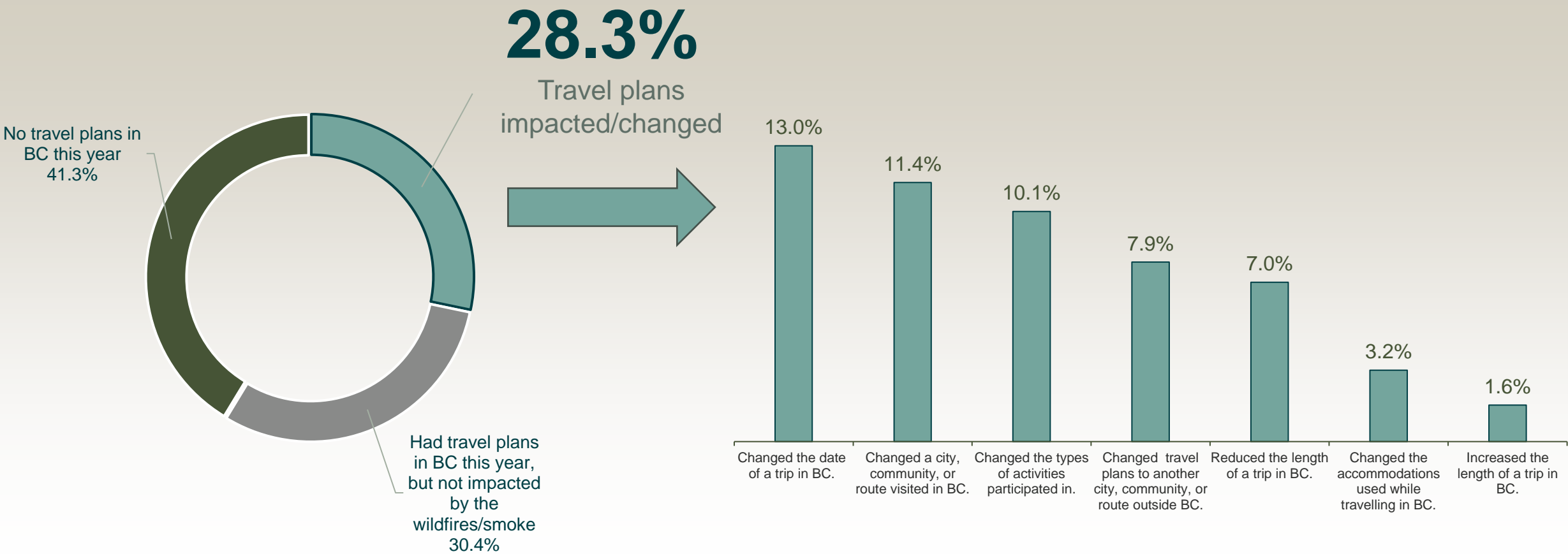


More Tourists	REGION	Fewer Tourists
15%	Metro Vancouver	27%
13%	Vancouver Isl	30%
19%	Rest of BC	28%
GENDER		
23%	Male	23%
9%	Female	32%
AGE		
9%	18 to 34	30%
17%	35 to 54	25%
20%	55+	29%
HH INCOME		
11%	<\$75K	31%
20%	\$75K+	27%

  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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