

**HESITATIONS FOR
SUMMER/FALL 2020
TRAVEL**

**COVID SPECIFIC
EXPECTATIONS
FRONT & CENTRE**

**WHAT IS THE
STORY?**



COVID-19 & TRAVEL IMPACT STUDY

FINAL RESULTS

**SURVEY OF ONTARIO, WINNIPEG & MONTEAL
RESIDENTS**



METHODOLOGY

The survey was conducted with 3,000 Canadian residents from June 2 to 18, 2020. This includes 2,000 Ontario residents, 400 Winnipeg residents, and 600 Montreal area residents. A random sample of panelists were invited to complete the survey from a set of partner panels based on the Lucid exchange platform. These partners are typically double opt-in survey panels, blended to manage out potential skews in the data from a single source.

The margin of error for a comparable probability-based random sample of the same size is +/- 2.19%, 19 times out of 20.

The data were weighted according to census data to ensure that the sample matched Canada's population according to age, gender, educational attainment, and region. Totals may not add up to 100 due to rounding.

The main report includes Ontario only results. Results from Winnipeg and Montreal can be found in their own appendix.

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A dark, atmospheric photograph of an airport terminal. In the foreground, a black rolling suitcase stands upright on the right side. The background shows a busy airport with people walking, sitting on chairs, and standing near information screens. The lighting is dim, creating a moody and professional feel. The text 'EXECUTIVE SUMMARY' is overlaid in large, bold, light blue letters across the center of the image.

EXECUTIVE SUMMARY

HOW DO TRAVELERS FEEL ABOUT SUMMER/FALL 2020 TRAVEL?

Travel in summer 2020 means playing it safe.

Most travelers aren't taking any risks and will take the necessary steps to eliminate what risks they can, in part by following public health guidelines like physical distancing. For some, the risks of contracting COVID, especially far from home, is enough to make them stay home.

Of all the different types of concerns as a result of COVID, Ontarians feel most strongly about traveling to places that are certain to follow COVID protocols, and places that they are familiar with (likely because they have a sense of whether or not the protocols will be in place).

61% Knowing that operators are following COVID-19 protocols is important.

54% Being familiar with an operator is important.

Ontario travelers are:

- Staying closer to home (purposefully choosing destinations that are close, and can be done as a shorter trip)
- Eliminating as many interactions with the public as possible (very little comfort with public transit, activities that involve crowds, destinations that are densely populated.)
- Doing what is familiar. Comfort with accommodation type, transit, and activities increases among those who stayed there/participated in that activity in the past.

WILL COVID-19 INCREASE OR DECREASE THE NUMBER OF TRAVELERS TO ONTARIO THIS SUMMER?

Likely increase. More are considering Ontario as a destination and those interested in traveling, are traveling in Ontario. Especially an Ontario destination close to home.

Few have actually made a booking but those comfortable venturing out will likely stay local.

60% Will be comfortable travelling in their region within 3 months of restrictions being lifted.

50% Will be comfortable travelling outside their region (within the province) within 3 months of restrictions being lifted.

And those who previously chose out-of-country travel, are more likely to stay closer to home.

43% of US frequent travelers are more likely to travel within their own region.

43% of Int'l frequent travelers are more likely to travel within their own region.

49% of other province travelers are more likely to travel within their own region.

That said, overall feelings about travel are very apprehensive. Whether or not people are comfortable with activities or accommodations, they just aren't that eager to start booking.

6% Said they were willing to jump right back into travel once restrictions were lifted.

67% Have no intentions to even start planning a trip, let alone book one.

WHO WILL BE TRAVELING TO ONTARIO DESTINATIONS?

Those who are travelling are the type of travelers whose favourite travel activities are “COVID friendly”. The kind of people who travel to visit family/friends, or outdoor open spaces.

40% of family lovers will travel within their region ASAP.

+7
from av

43% Of outdoor space seekers will travel within their region ASAP.

+10
from av

Retirees, are interested in making Ontario travel plans. And while millennial urbanites are most likely to be planning their post-COVID travel, they don't seem to be planning to visit an Ontario destination. Economy travelers are also more comfortable than premium travelers, with Ontario destinations.

37% of retirees will travel within their region ASAP.

+5
from av

27% of millennial urbanites will travel within their region ASAP.

-6
from av

WHERE WILL PEOPLE BE GOING?

The less dense an area, the more comfortable people will be travelling there.

64% Comfortable traveling to a park or other outdoor space this summer.

32% Comfortable traveling to a large urban centre this summer.

travelers will be looking for shorter trips.

65% Have booked/certain to/likely book a day trip to an Ontario destination.

32% Have booked/certain to/likely book a week-long trip to an Ontario destination.

And looking to stay close to home.

77% Will prefer to stay closer to home, as opposed to travelling to further destinations.

69% Say "preferring to stay closer to home for staycations" describes them perfectly/pretty well.

WHAT WILL THEY BE COMFORTABLE DOING?

People are most comfortable with accommodations and activities that limit the number of interactions with others, and allow them to maintain physical distancing. Second most important is the size of operations (i.e. prefer a chain hotel rather than a bed and breakfast).

81% Say the phrase "I will prefer small group activities..." describes them perfectly.

78% Say the phrase "I will prefer less populated destinations because of COVID-19" describes them perfectly.

ACTIVITIES

69% Completely/mostly comfortable with outdoor activities.

68% Completely/mostly comfortable visiting with family/friends.

20% Completely/mostly comfortable with sporting events.

20% Completely/mostly comfortable visiting with concerts/music festivals.

ACCOMMODATIONS

74% Very/somewhat comfortable traveling to their second property.

77% Very/somewhat comfortable traveling to stay with family/friends.

34% Very/somewhat comfortable staying at a bed and breakfast.

37% Very/completely comfortable staying at a vacation rental property.

WHAT WILL THEY BE COMFORTABLE DOING?

Ontarians are more comfortable with activities that involve minimal interactions with the public, allow them to easily practice physical distancing, and give them greater control of their situation. There is still hesitation to do some activities, even among those that love them.

	% completely/ mostly comfortable	Those that love to do this activity
Visit with family and friends who live at the destination you're visiting	68%	82%
Outdoor activities (e.g. hiking, cycling, fishing etc.)	69%	85%
Shopping	50%	63%
Food & drink	52%	59%
Camping (in a tent or RV/trailer)	43%	78%
Touring (RV, motorcycle, boating)	41%	76%
Cultural events/Museums/Art Galleries	30%	45%
Wellness experiences (e.g. spa, yoga)	27%	54%
Amusement Parks/Zoos/Aquariums	28%	41%
Sporting events	20%	43%
Concerts or music festivals	20%	32%

WHAT CAN OPERATORS DO?

Many of the barriers for post COVID travel this summer are out of the control of operators. Travelers will likely be drawn to activities/accommodations that allow them to follow public health guidelines (notably the ability to practice physical distancing). Not all operators will be able to meet this baseline.

Operators can't change the location of their businesses (from downtown Toronto to small town Stratford), nor can they change the type of business they operate (switching from a B&B to a chain hotel, or a concert venue to a provincial park). For these operators, the very nature of their business would have to change for people to feel comfortable.

For operators that are able to meet these 'structural needs' for travelers, there are two other key pieces to focus on.

Operators that are opening/plan to open in the next few months need to understand and meet travelers expectations on: adherence to COVID-19 protocols, and familiarity.

WHAT CAN OPERATORS DO?

SHOW ADHERENCE TO COVID-19 PROTOCOLS AND PROCEDURES.

When looking for travel information, travelers are most likely to turn to provincial/federal government guidelines. As an operator ensure that you meet these specific recommendations and then show your guests that these are the regulations you are following.

74% very/somewhat likely to look at federal government websites for travel advice.

74% very/somewhat likely to look at federal government websites for travel advice.

70% The ability to see clear communications on adherence to protocol is critical/important.

BUILD FAMILIARITY, AND SUBSEQUENTLY, TRUST.

Right now, your past customers are your best asset. Aside from COVID protocols, familiarity is the most important travel factor right now. Travelers are more likely to pick places they have already been, or already know about.

This is also one of the best ways to increase your customers base. The second most consulted source for travel info is crowd sourced info, like family and friends. The more you speak to your current base about following protocols, they are more likely they are to share this with their family/friends.

71% say the phrase "I'm more likely to visit somewhere I visited before because I know what to expect, describes them perfectly.

71% very/somewhat likely to look to recommendations from family/friends.

A dark, atmospheric photograph of an airport terminal. In the foreground, a black rolling suitcase stands upright on the right side. The background shows a busy airport with people walking, sitting on chairs, and standing near information screens. The lighting is dim, creating a moody and somewhat somber atmosphere. The text 'TRAVELER PROFILES' is overlaid in large, bright blue, bold letters across the center of the image.

TRAVELER PROFILES

PROFILES

TRIP/SPEND PROFILES *ONTARIO ONLY

	AVERAGE TRIP SPEND (PRE-COVID)	TOOK THIS KIND OF TRIP IN SUMMER/FALL 2019 TO AN ONTARIO DESTINATION	% OF SAMPLE
ECONOMY OVERNIGHTERS	UNDER \$4K	DAY OR OVERNIGHT TRIP	52%
PREMIUM OVERNIGHTERS	OVER \$4K	DAY OR OVERNIGHT TRIP	11%
ECONOMY WEEKENDERS	UNDER \$4K	WEEKEND TRIP	42%
PREMIUM WEEKENDERS	OVER \$4K	WEEKEND TRIP	8%
ECONOMY WEEK+	UNDER \$4K	WEEK LONG + TRIP	18%
PREMIUM WEEK+	OVER \$4K	WEEK LONG + TRIP	5%

LIFESTAGE PROFILES

			% OF SAMPLE
MILLENNIAL URBANITES	BORN IN 1980-2000	LIVE IN TORONTO (NOT GTA) OR URBAN OTTAWA	11%
RETIREEES	RETIRED		15%

PROFILES

ACTIVITY PROFILES *ONTARIO ONLY

	LOVE TO DO AT LEAST ONE OF THE FOLLOWING WHEN THEY TRAVEL	% OF SAMPLE
OUTDOOR SPACE SEEKERS	OUTDOOR ACTIVITIES CAMPING TOURING	35%
MASS EVENT/ATTRACTION FANS	AMUSEMENT PARKS/ZOOS/AQUARIUMS SPORTING EVENTS CONCERTS/MUSIC FESTIVALS	35%
INDOOR INTERESTS	SHOPPING CULTURAL EVENTS/MUSEUMS/ART GALLERIES	34%
FAMILY LOVERS	VISIT WITH FAMILY/FRIENDS AT THE DESTINATION YOU ARE VISITING	34%
FOODIES	FOOD & DRINK	41%
WELLNESS LOVERS	WELLNESS EXPERIENCES (E.G. SPA, YOGA)	11%

A dark, atmospheric photograph of an airport terminal. In the foreground, a black rolling suitcase stands upright. The background shows a busy airport with people walking, sitting, and standing. There are flight information screens and structural beams visible. The overall lighting is dim, creating a somber mood.

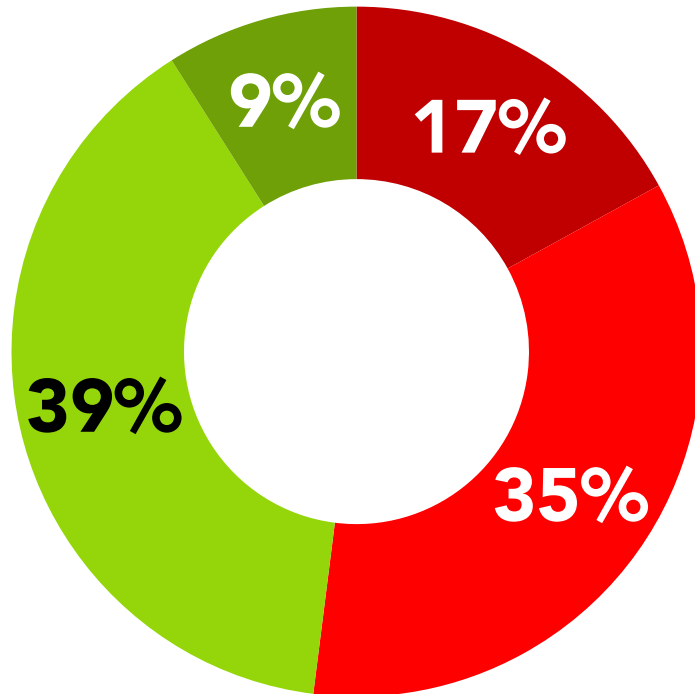
THE COVID-19 PANDEMIC AND TRAVEL

THE COVID-19 PANDEMIC AND TRAVEL

- **Most travelers remain worried about the pandemic: and 56% say they are worried about COVID-19 affecting their ability to travel.**
 - **Worry is highest among the week-long economy travelers, premium weekenders. Among the activity profiles, wellness lovers are the most concerned. Millennial urbanites also carry a lot of concern about the pandemic (much more than retirees).**
 - **Premium travelers are much more likely to be concerned about the impacts of COVID-19 on travel (66%, vs 53% of economy travelers). Millennial urbanites are also much more concerned than retirees (62% vs. 54%).**
- **Two thirds of Ontario travelers have postponed a trip due to the pandemic. And over half have cancelled. In total, 43% of Ontario travelers have cancelled/postponed at least one trip this summer (June-August).**

MOST ARE WORRIED ABOUT THE PANDEMIC

■ Really worried ■ Somewhat worried ■ A little worried ■ Not worried at all

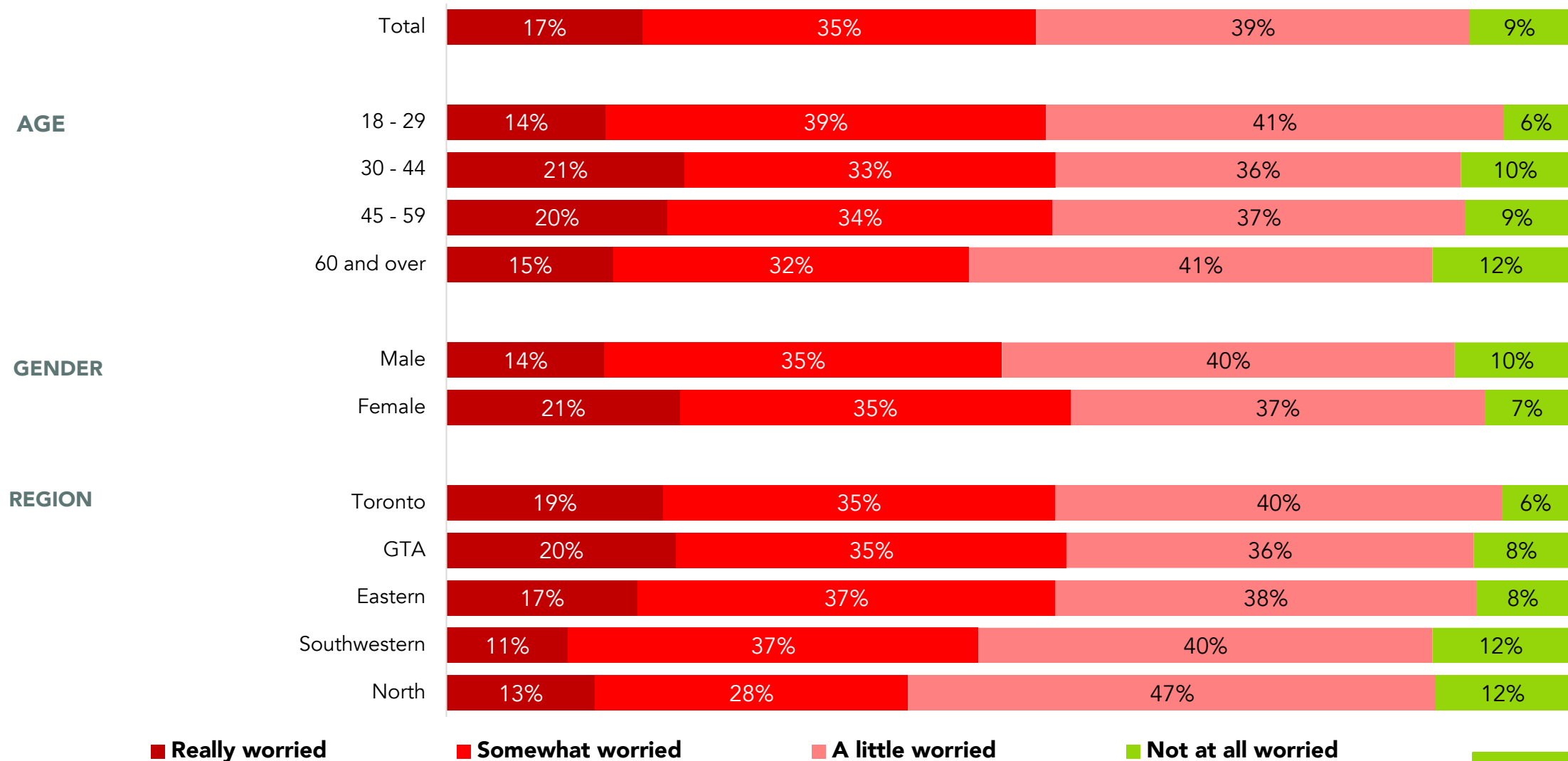


52% of travelers say coronavirus is making them worried.

Worry is highest among the week-long economy travelers, premium weekenders. Among the activity profiles, wellness lovers are the most concerned. Millennial urbanites also carry a lot of concern about the pandemic (much more than retirees).

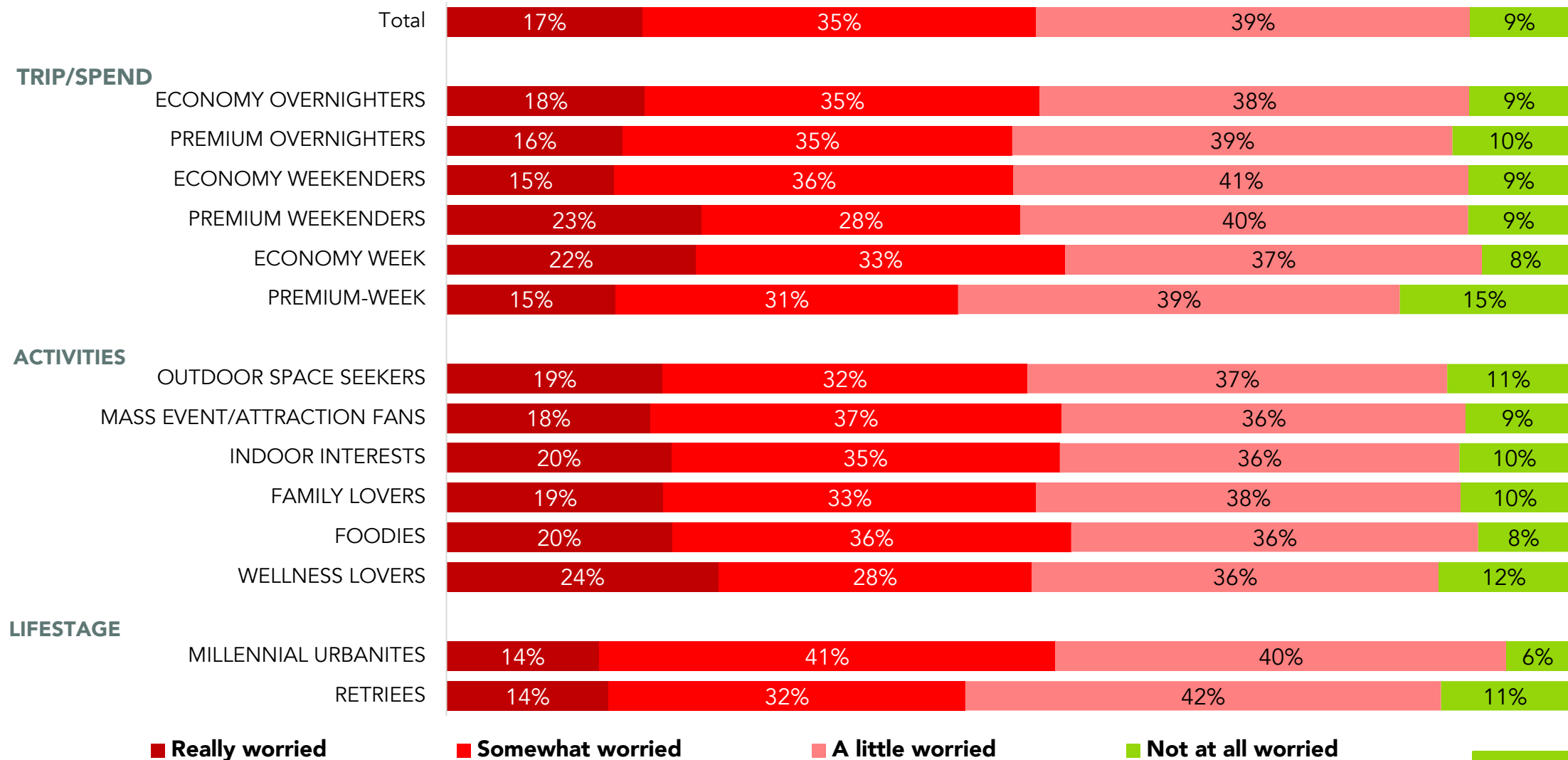
Overall, how worried, if at all, is the situation with the coronavirus or COVID-19 making you right now?

WORRY ABOUT CORONAVIRUS OUTBREAK



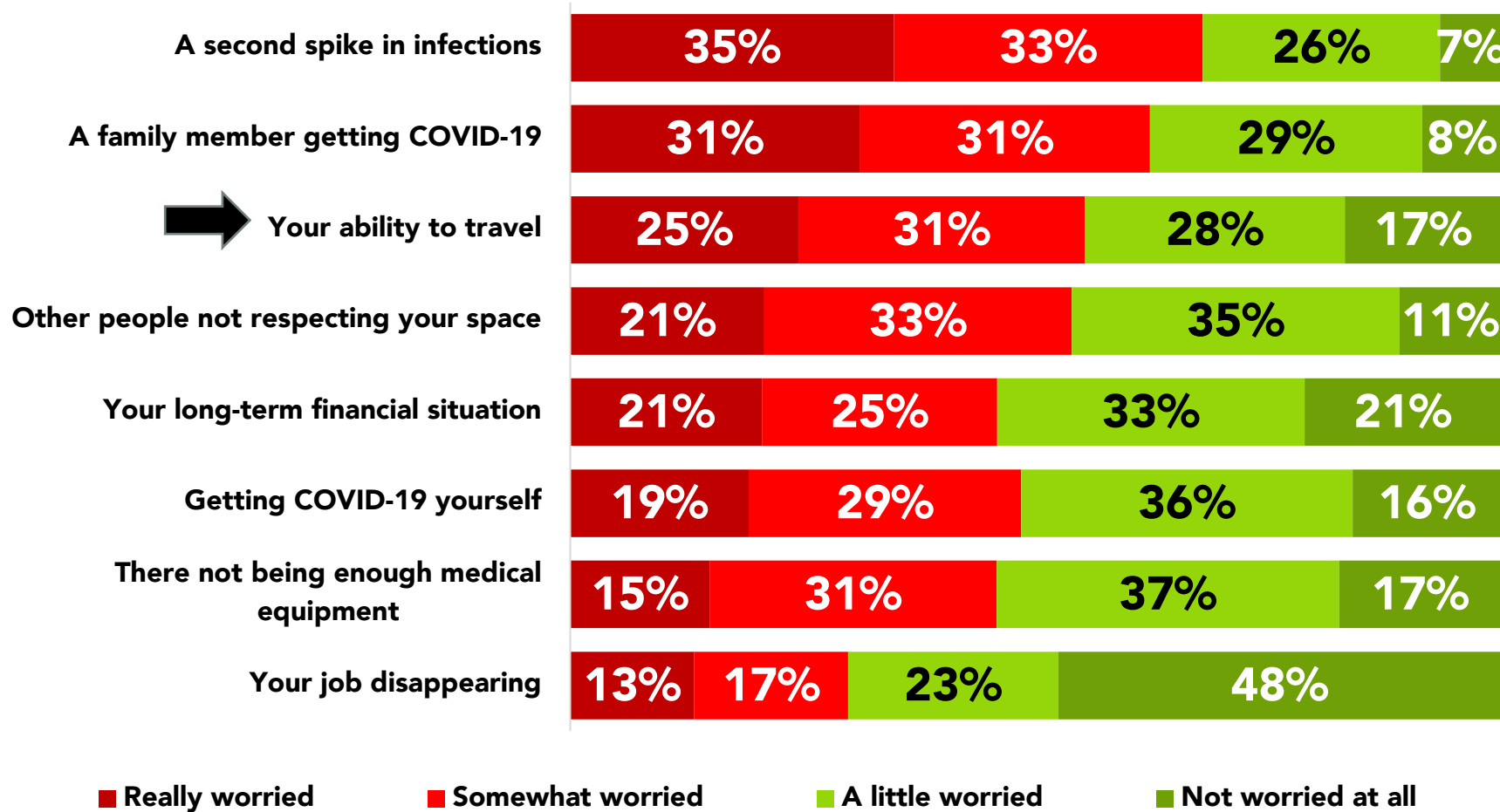
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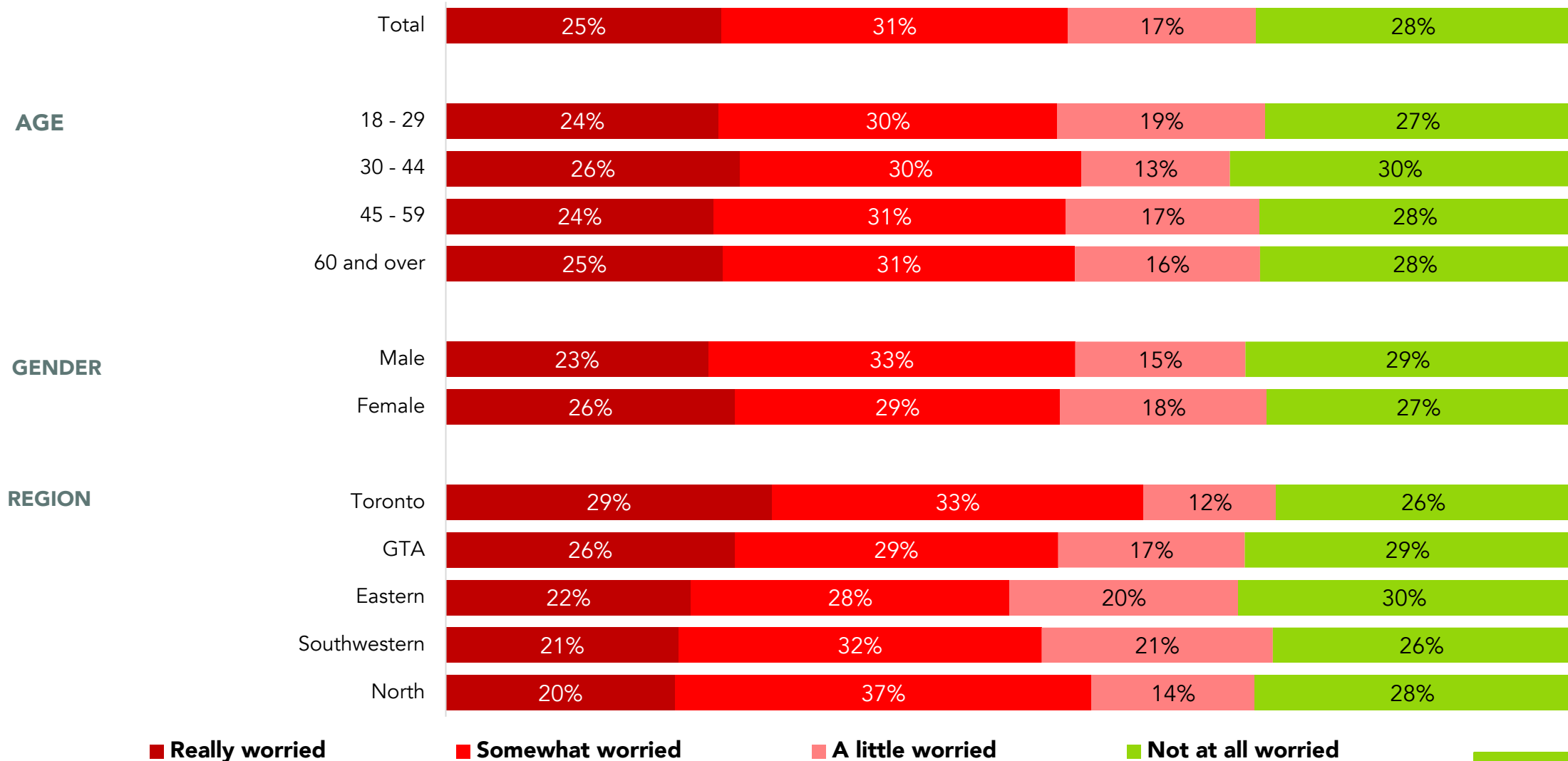
TO WHAT EXTENT ARE YOU WORRIED ABOUT THE FOLLOWING...



Among Ontarians, 56% say they are worried about COVID-19 affecting their ability to travel. Premium travelers are much more likely to be concerned about the impacts of COVID-19 on travel (66%, vs 53% of economy travelers). Millennial urbanites are also much more concerned than retirees (62% vs. 54%).

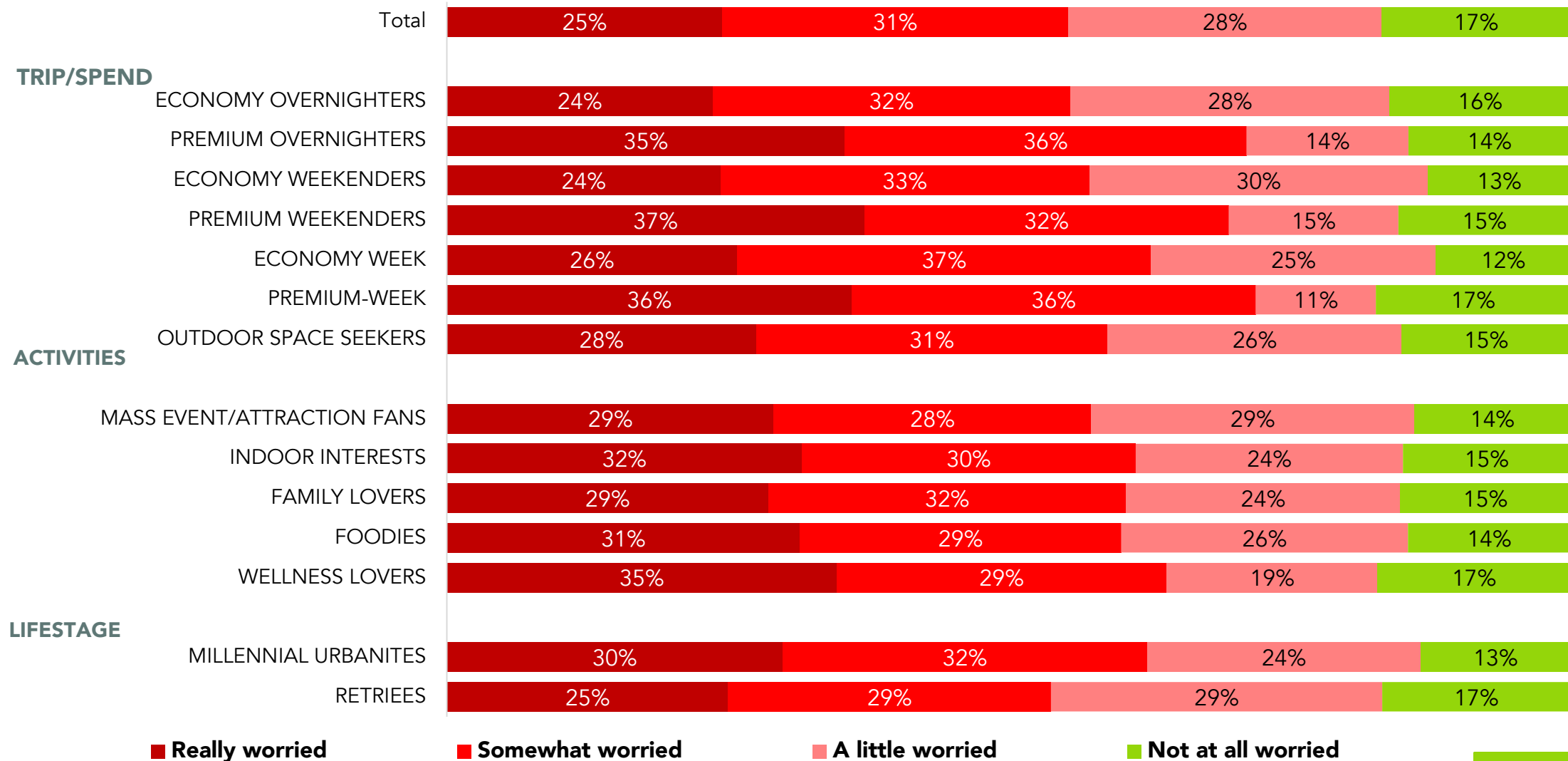
To what extent, if at all, are you worried about the following when it comes to the COVID-19 pandemic

YOUR ABILITY TO TRAVEL



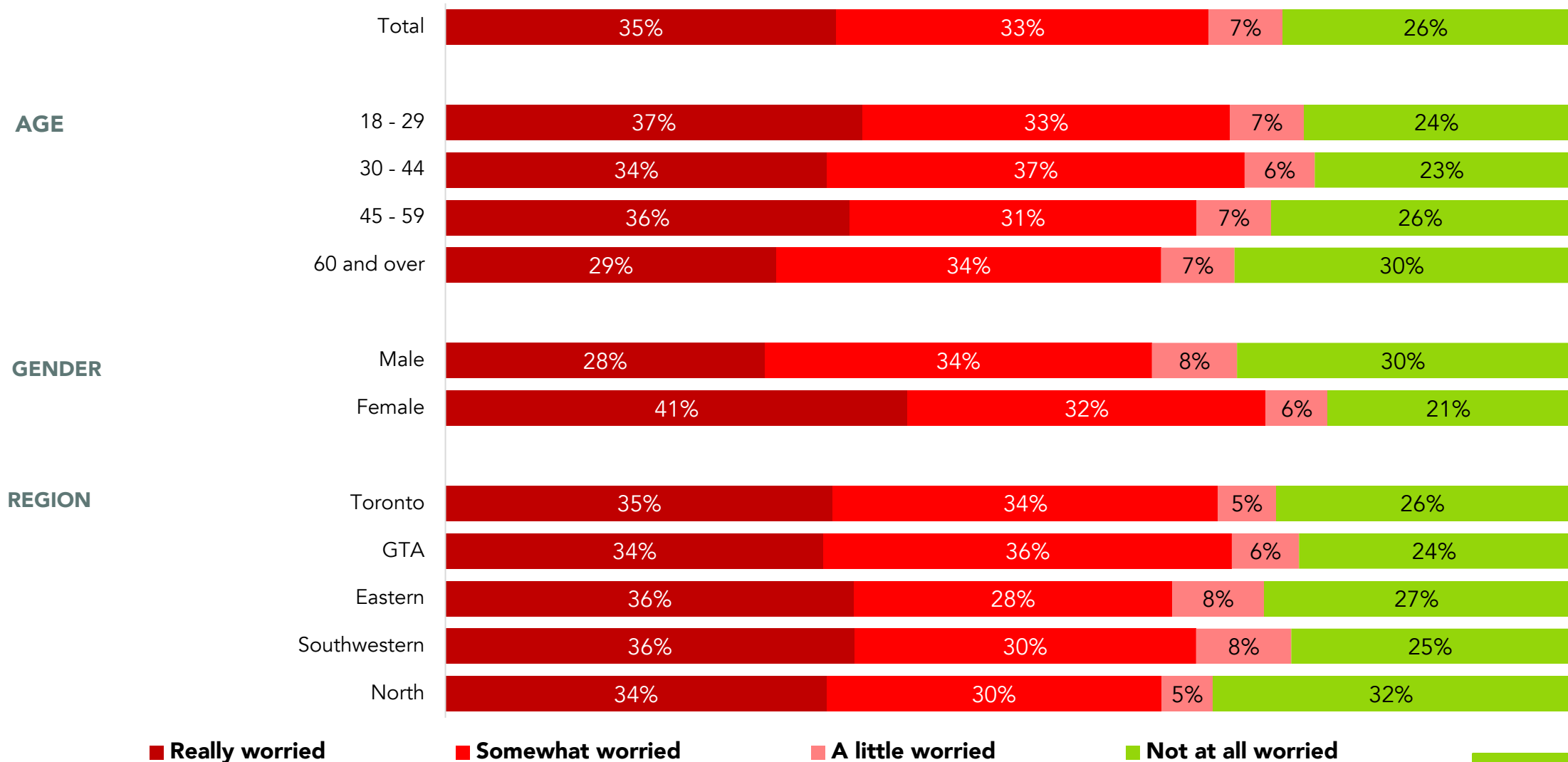
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YOUR ABILITY TO TRAVEL



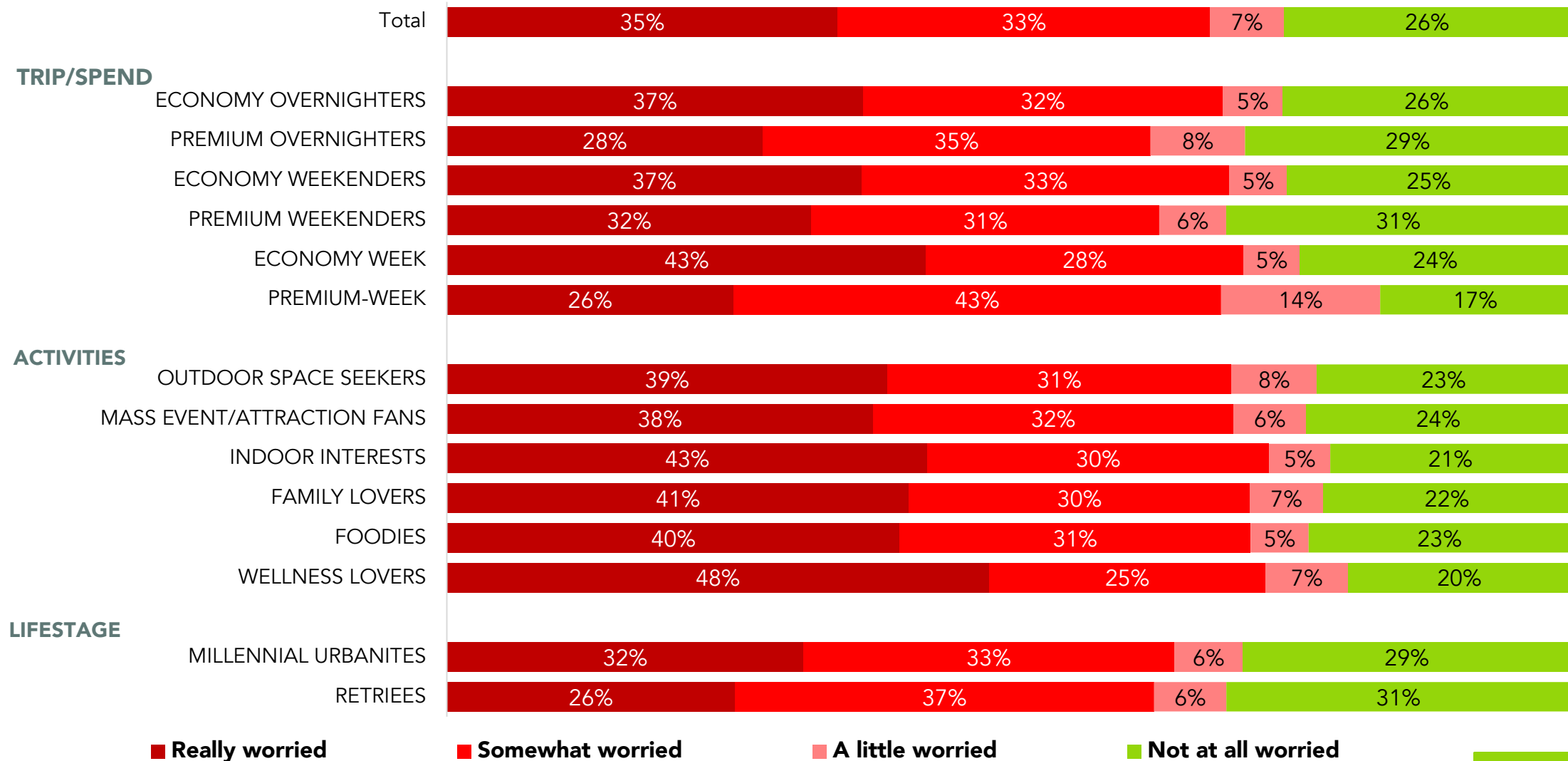
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SECOND SPIKE



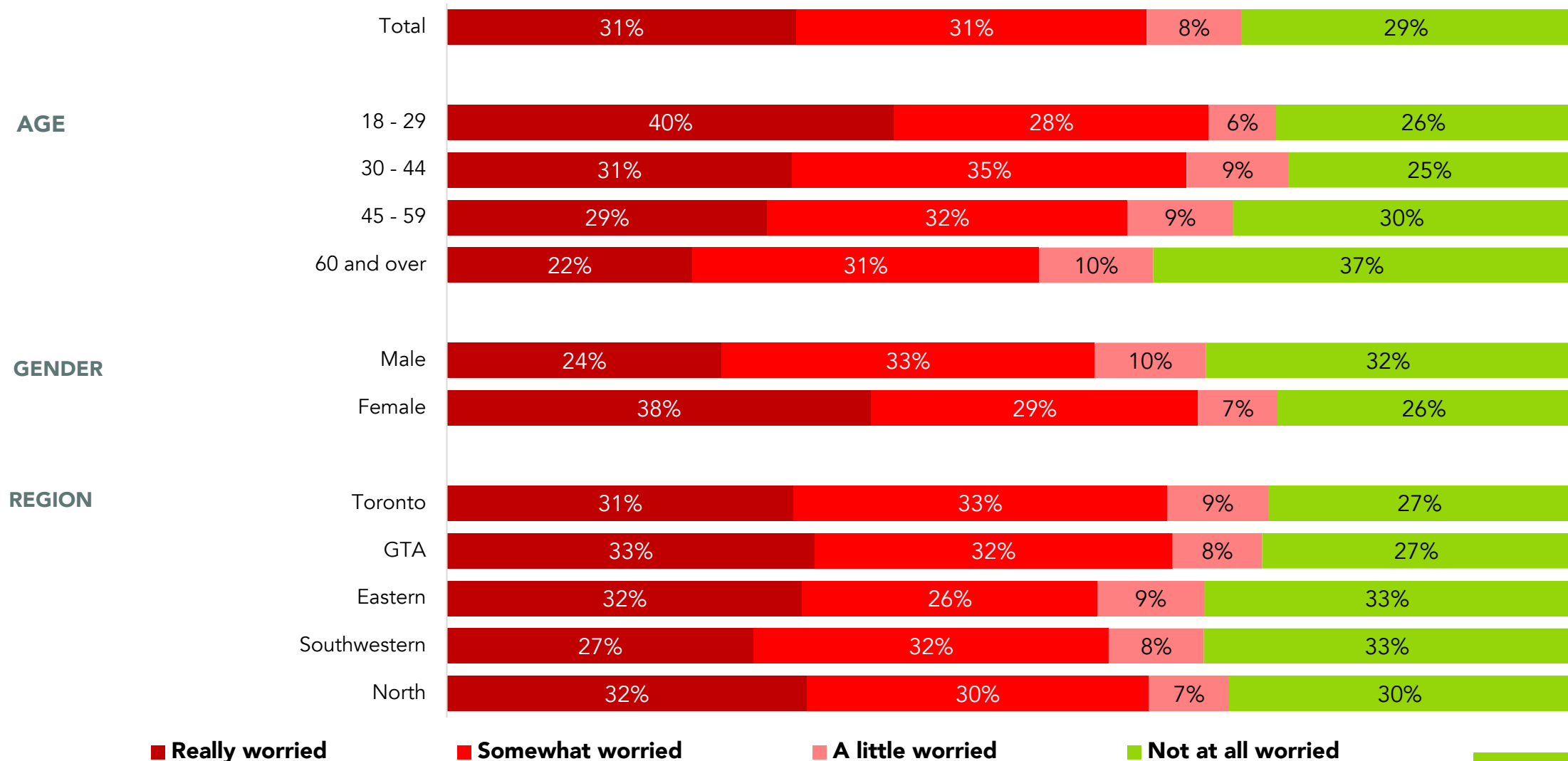
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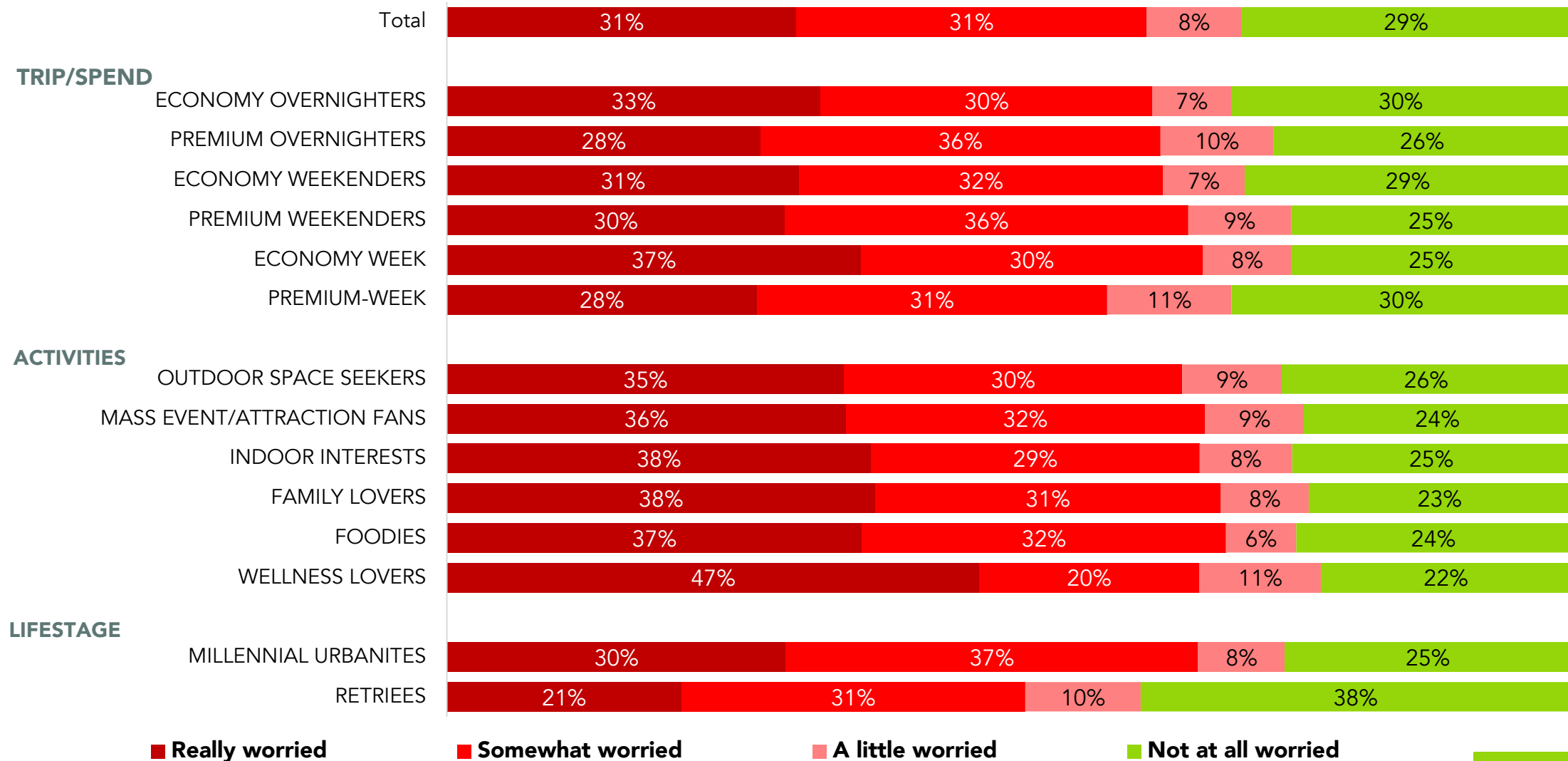
To what extent, if at all, are you worried about the following when it comes to the COVID-19 pandemic

FAMILY MEMBER GETTING COVID-19



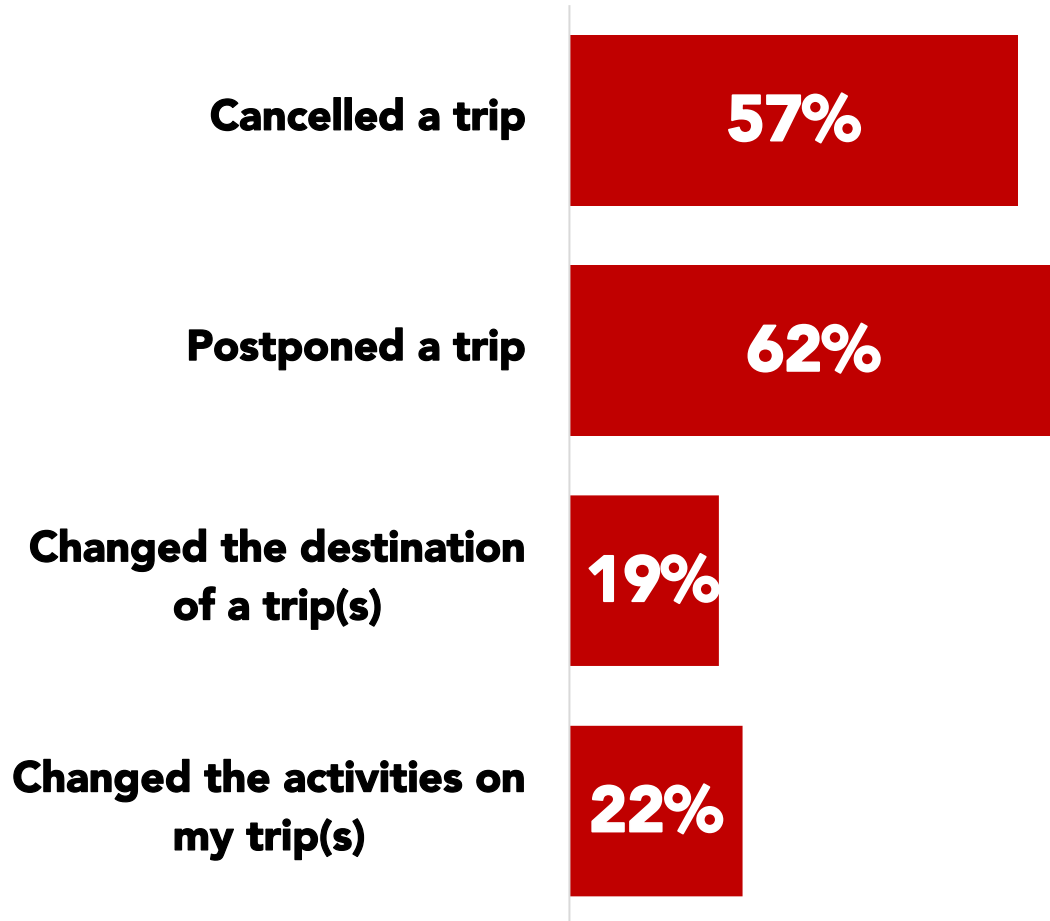
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FAMILY MEMBER GETTING COVID-19



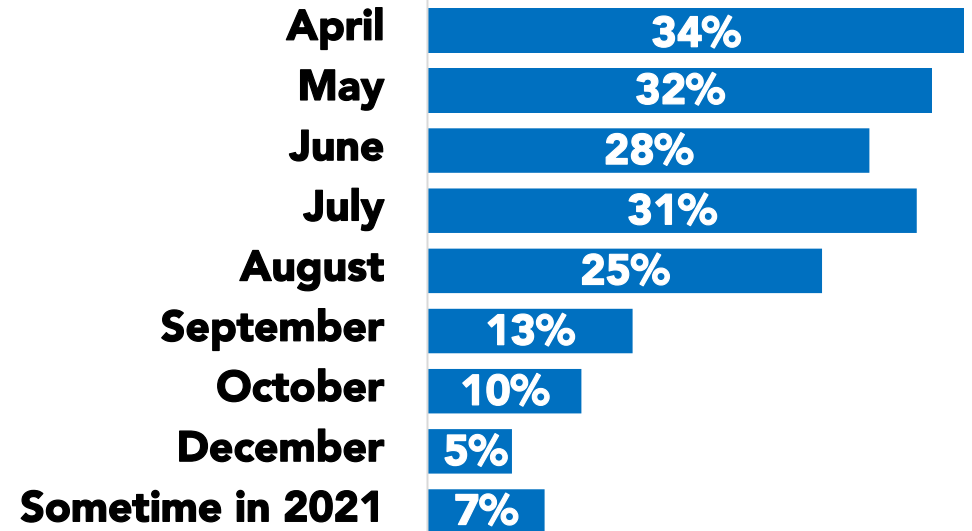
To what extent, if at all, are you worried about the following when it comes to the COVID-19 pandemic

SIGNIFICANT IMPACT TO TRAVEL PLANS



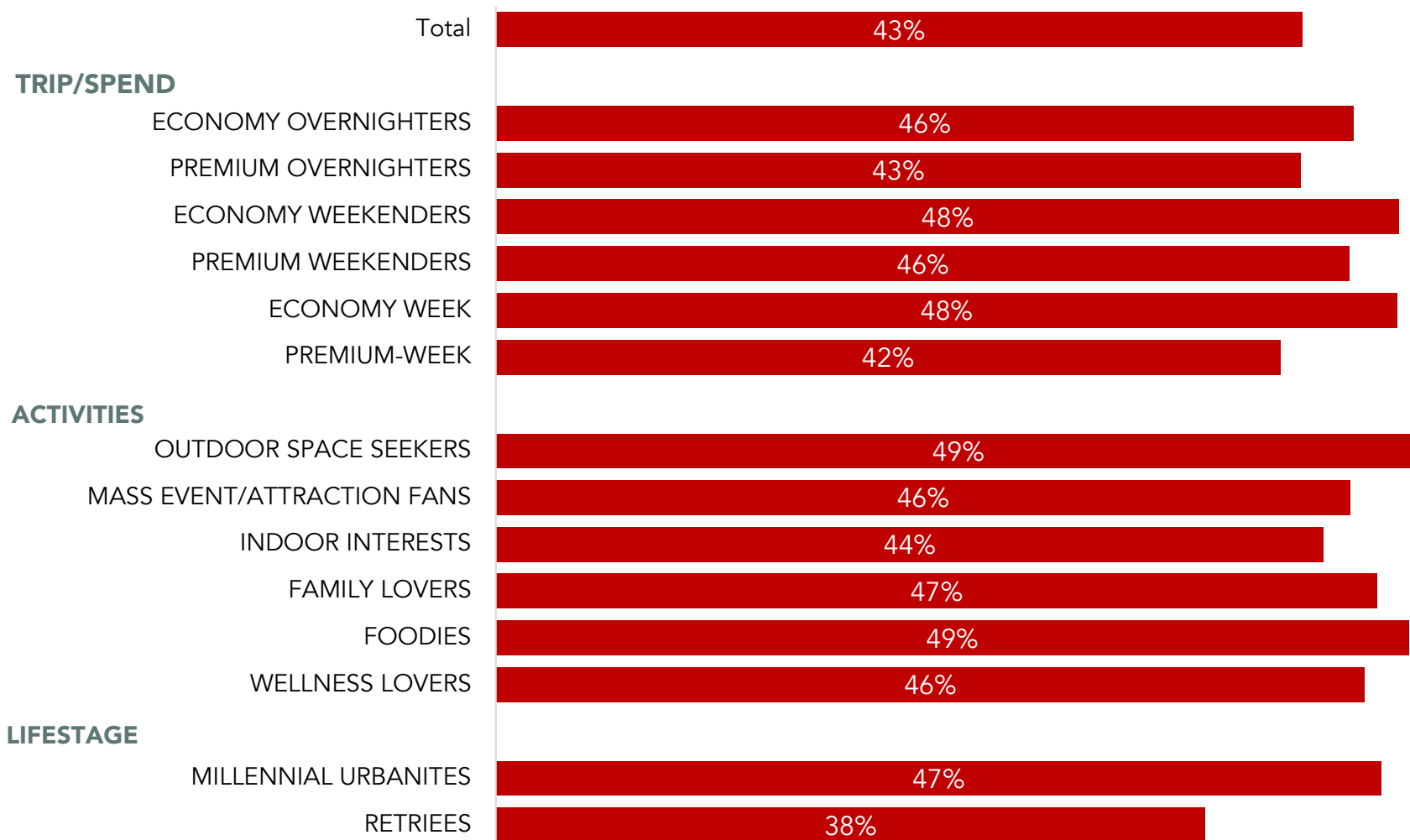
Nearly two-thirds say they postponed a trip due to COVID-19. Well over half have made a cancellation.

Many have cancelled and postponed trips this summer. In total, 43% of Ontario travelers have cancelled/postponed at least one trip this summer (June-August).



Due to the coronavirus outbreak have you had to do any of the following.../Of the trips that you cancelled/postponed, which month(s) were they scheduled to take place? Please select all that apply

THOSE WHO HAVE CANCELLED/POSTPONED THIS SUMMER



Economy travelers are more likely to have rearranged their summer trip, compared to premium travelers.

Outdoor space seekers, and foodies are slightly more likely to have rearranged summer travel plans.

Half of millennial urbanites have rearranged summer plans, compared to just over a third of retirees.

Of the trips that you cancelled/postponed, which month(s) were they scheduled to take place? Please select all that apply

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SUMMER 2020 PLANS

SUMMER 2020 PLANS

- **Whether or not they feel comfortable with specific activities, very few Ontario travelers are comfortable with the idea of post-COVID travel. Only 6% will jump right back in.**
- **Within three months of restrictions being loosened, 62% would travel somewhere within the province. With restrictions being loosened now, we can assume this is the group that is likely to travel this summer/fall.**
 - **This summer, travel within the region is more popular among economy travelers, outdoor space seekers, and family lovers.**
 - **And those who travelled elsewhere (to the US, Internationally) are more likely to travel within the province.**

SUMMER 2020 PLANS

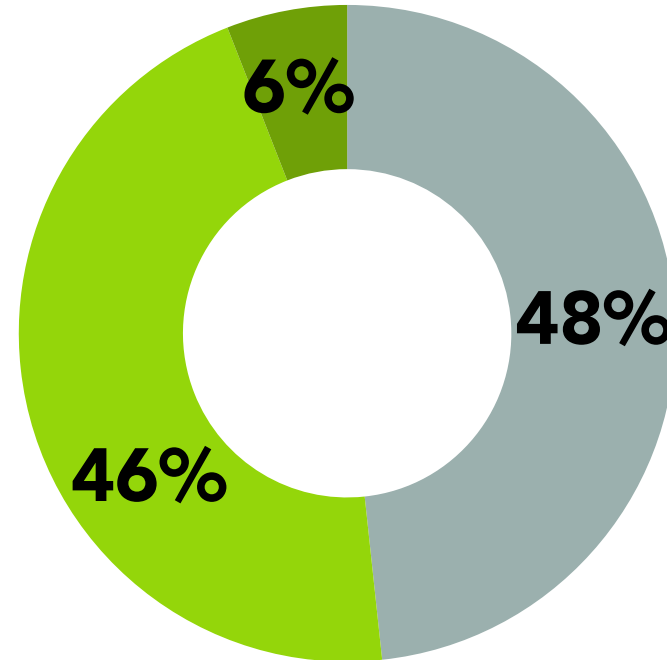
- **The guiding principles for Ontario travelers this summer are:**
 - **Take shorter trips**
 - **Remove as many public interactions as possible (less public transit, less activities that involve crowds, less densely populated areas, least 'public accommodations')**
 - **Do what is familiar (i.e. if you've taken lots of weekend trips, take weekend trips)**

POST-COVID TRAVEL COMFORT

■ I'll test the waters first

■ I'll get back in but carefully

■ I'll jump right back in



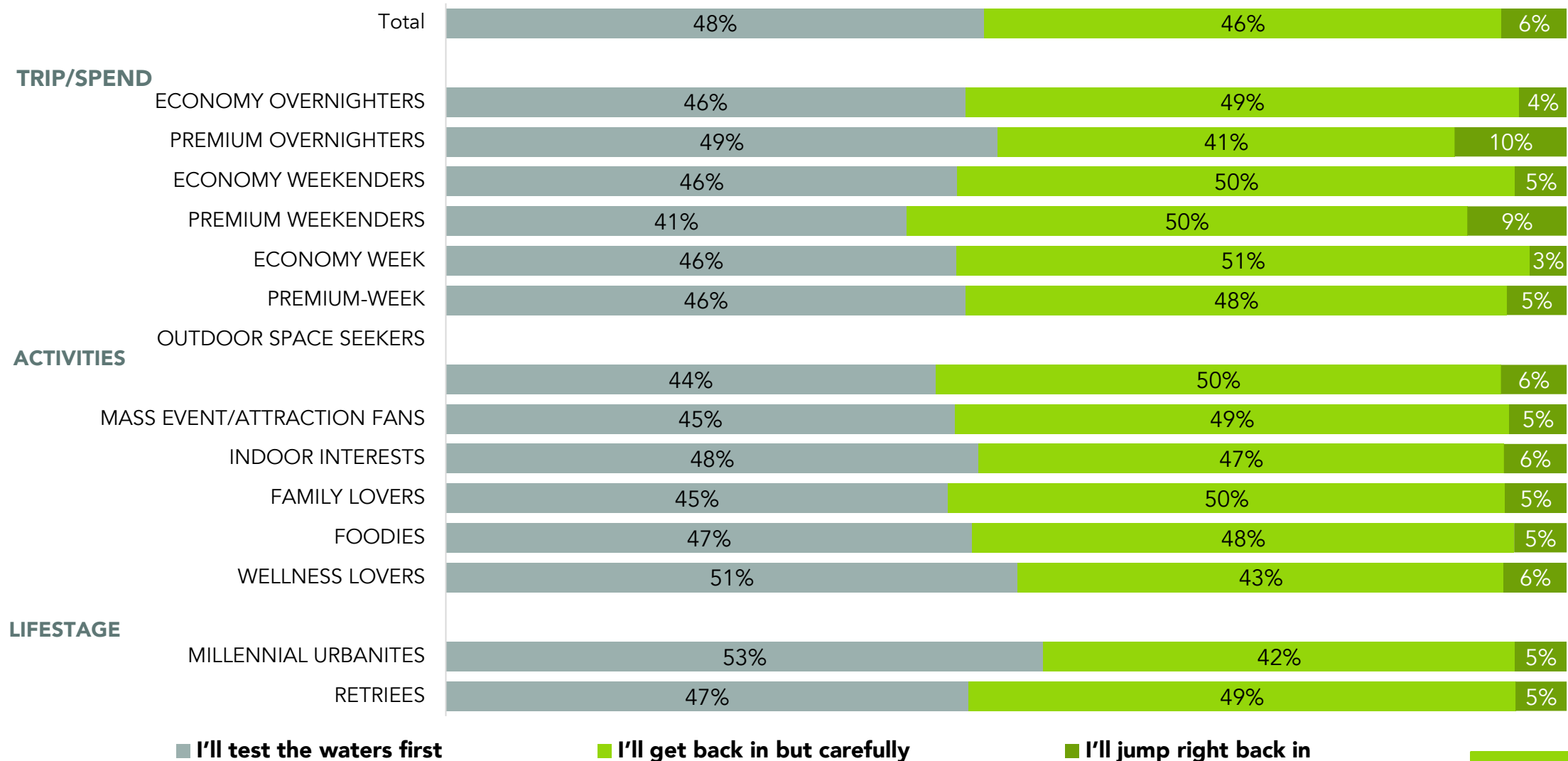
Few Ontario travelers are eager to get back into their travel habits. Only 6% are likely to resume their pre-COVID travel habits ASAP.

Most hesitant?

- **Wellness lovers (51% I'll test the waters first)**
- **Millennial urbanites (53% 'I'll test the waters first')**

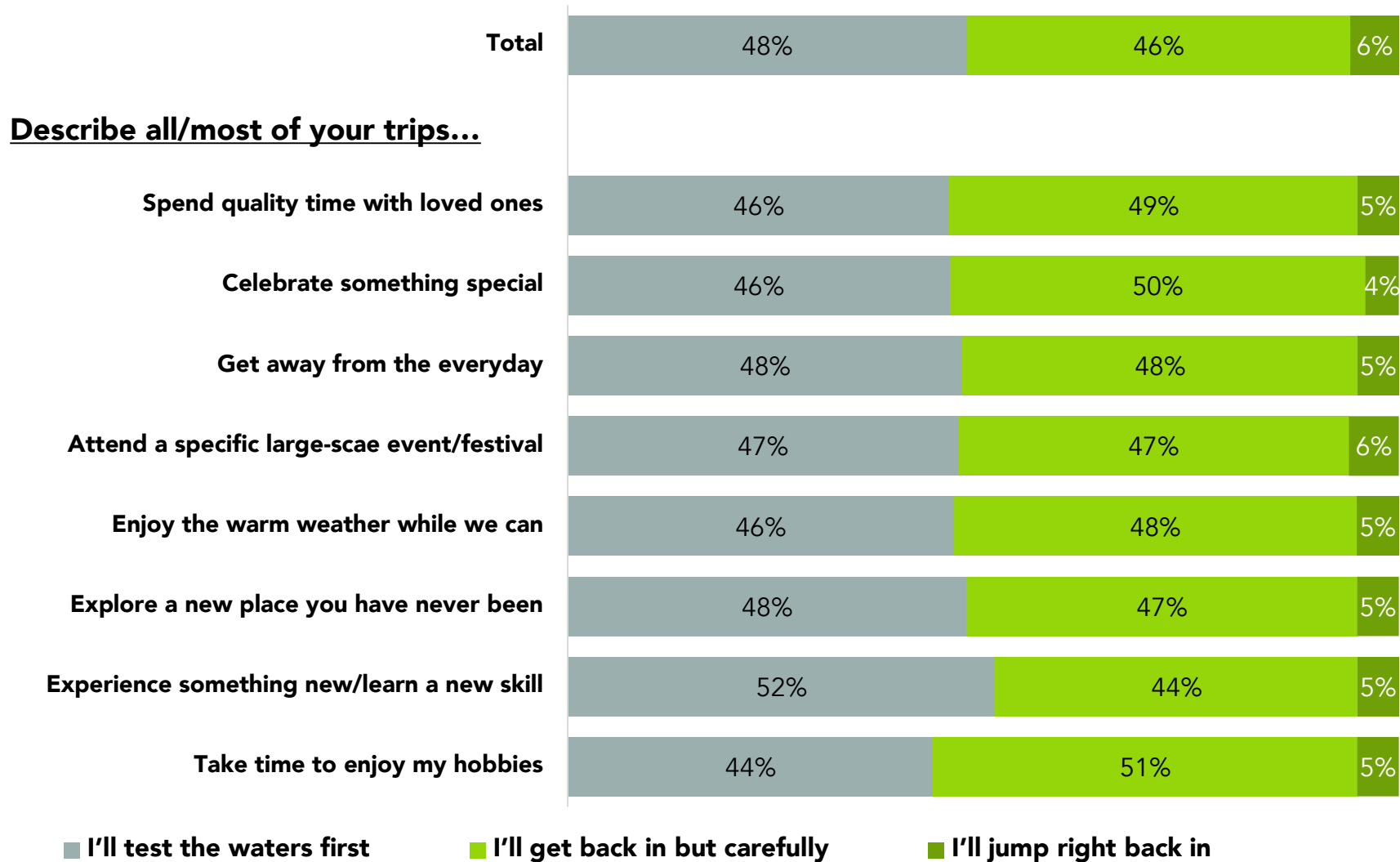
What best describes how you feel about travelling now as physical distancing restrictions start to be lifted

TRAVEL COMFORT LEVEL



What best describes how you feel about travelling now as physical distancing restrictions start to be lifted

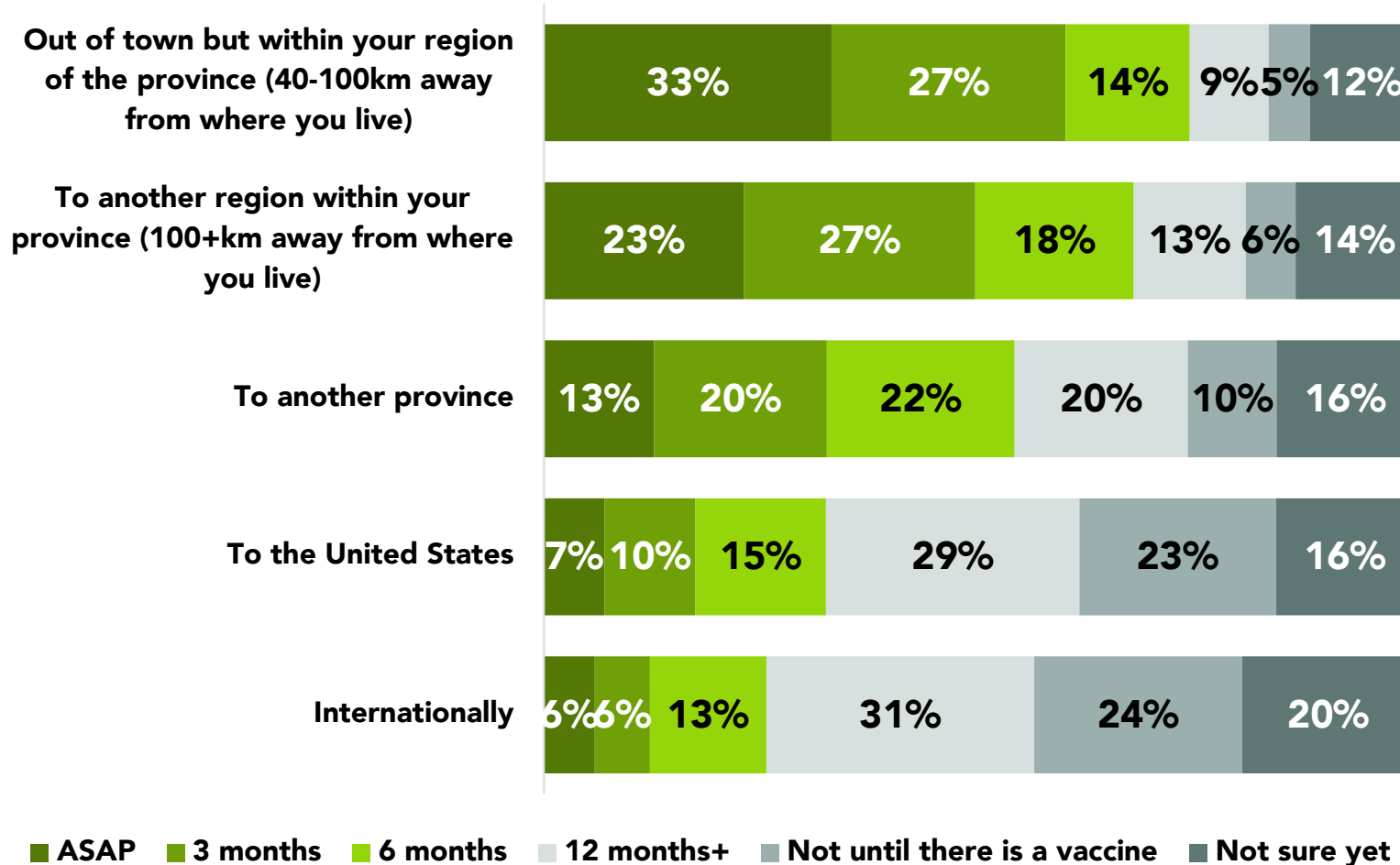
COMFORT LEVEL BY TRIP DRIVERS



Amongst all drivers for travel, travelers are hesitant to get right back into their travel habits. Those who travel to experience something new are slightly more hesitant than the rest.

What best describes how you feel about travelling now as physical distancing restrictions start to be lifted

TIME HORIZON FOR DIFFERENT DESTINATIONS



Within 3 months of restrictions being lifted 62% would be comfortable travelling within the province.

Without a doubt, travelers will be staying closer to home.

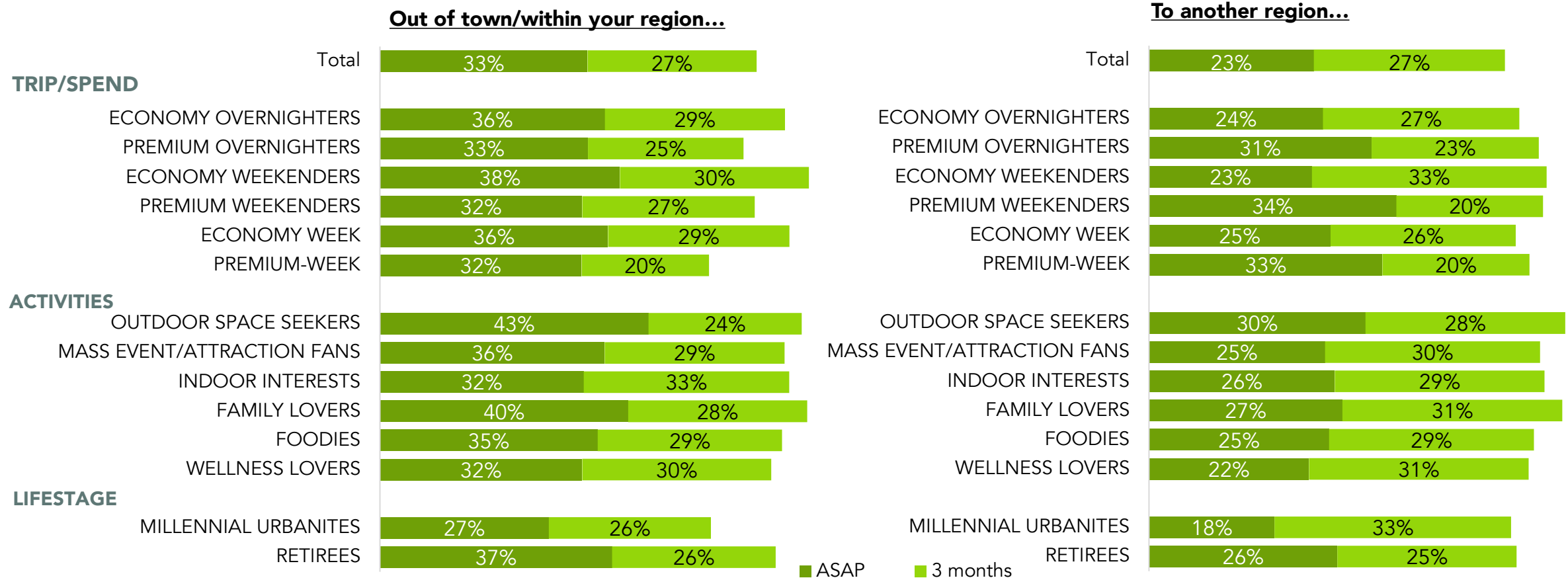
Economy travelers are more likely than premium travelers to want to explore local regions ASAP.

And premium travelers are more likely to explore other regions of the province ASAP.

Millennials and premium travelers are most eager to go further (out of province and beyond) ASAP.

Once travel restrictions are lifted, how long will it be before you feel comfortable travelling *not interested removed

TRAVEL THIS SUMMER...



This summer, travel within the region is more popular among economy travelers, outdoor space seekers, and family lovers. Retirees are excited to explore the province, but millennial urbanites? Not as much.

Once travel restrictions are lifted, how long will it be before you feel comfortable travelling *not interested removed

TRAVEL HABITS SHIFTING TO MORE LOCAL TRAVEL

US Frequent travelers
(those who went to the US at least a few times last year)

More likely to be travelling...
(much/somewhat more likely)

43%
Within their own region

36%
To other ON regions

60%
Less likely/definitely won't be travelling to the US this summer/fall

Int'l Frequent travelers
(those who travelled int'l at least a few times last year)

More likely to be travelling...
(much/somewhat more likely)

43%
Within their own region

36%
To other ON regions

61%
Less likely/definitely won't be travelling int'l this summer/fall

Other Prov. Frequent travelers
(those who travelled out of province at least a few times last year)

More likely to be travelling...
(much/somewhat more likely)

49%
Within their own region

43%
To other ON regions

40%
Less likely/definitely won't be travelling to another province int'l this summer/fall

Those who travelled to further destinations will be travelling closer to home this summer.

Among those who never took a trip within their own region last summer, 25% say they are likely to try it out this summer.

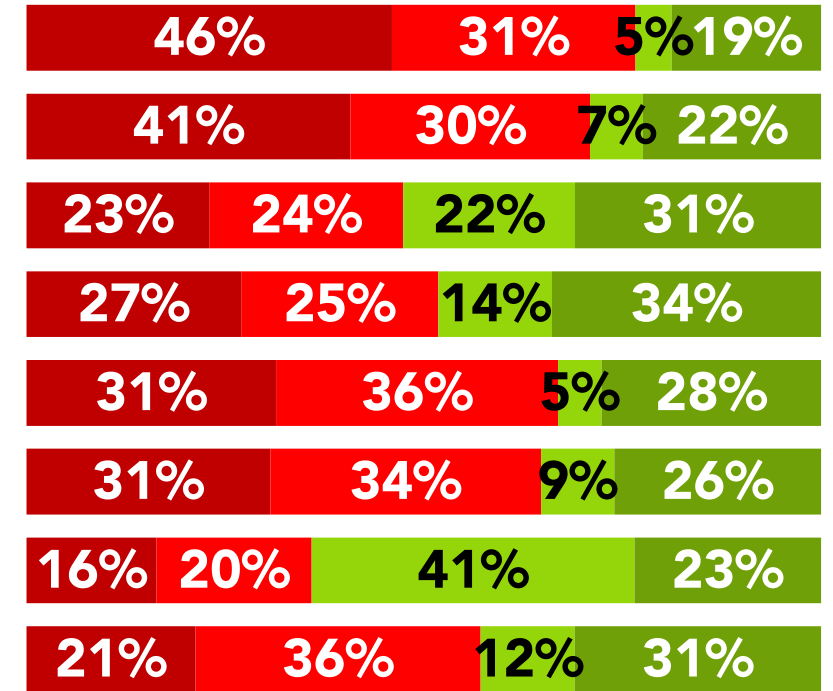
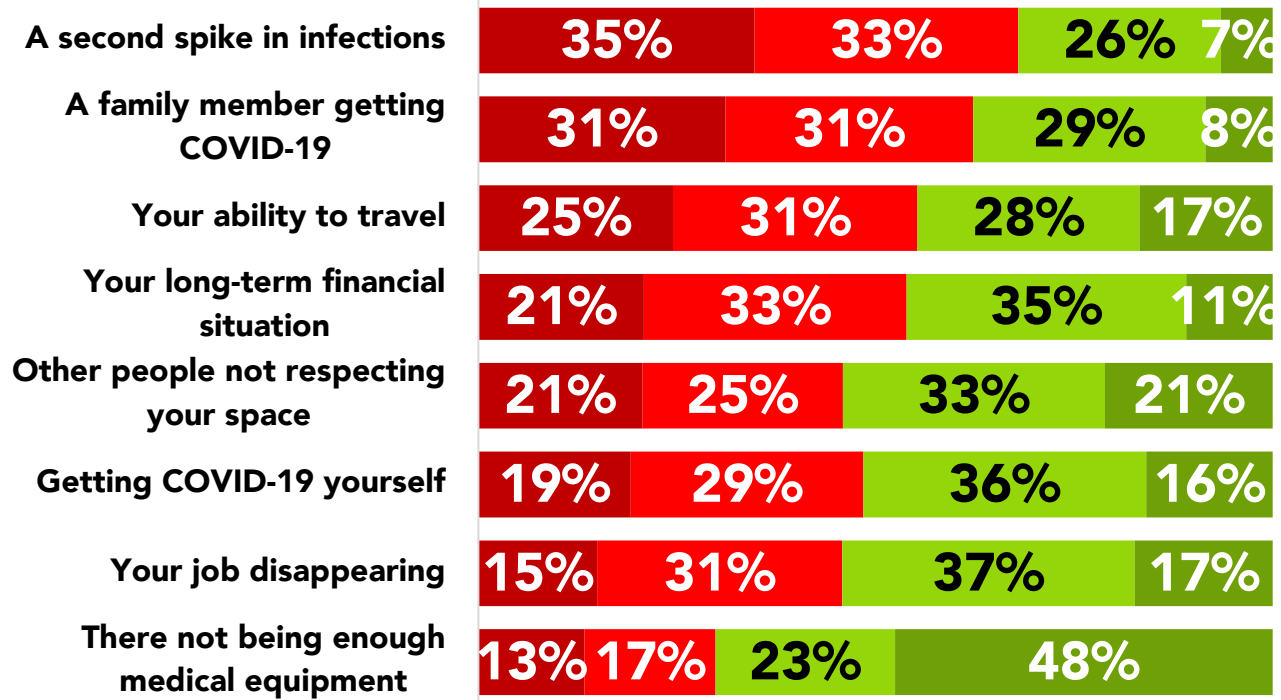
And for those who never took a trip elsewhere in the province, 19% will likely do so this summer.

Thinking about the upcoming summer and fall, compared to your travel habits last year, are you more or less likely to choose the following travel destinations this sum

THOSE NOT COMFORTABLE WITH PROVINCIAL TRAVEL HAVE MANY CONCERNS

Those comfortable travelling within Ontario in the next 3 months post travel restrictions.

Those not comfortable travelling within Ontario for a year+ or they just aren't sure yet

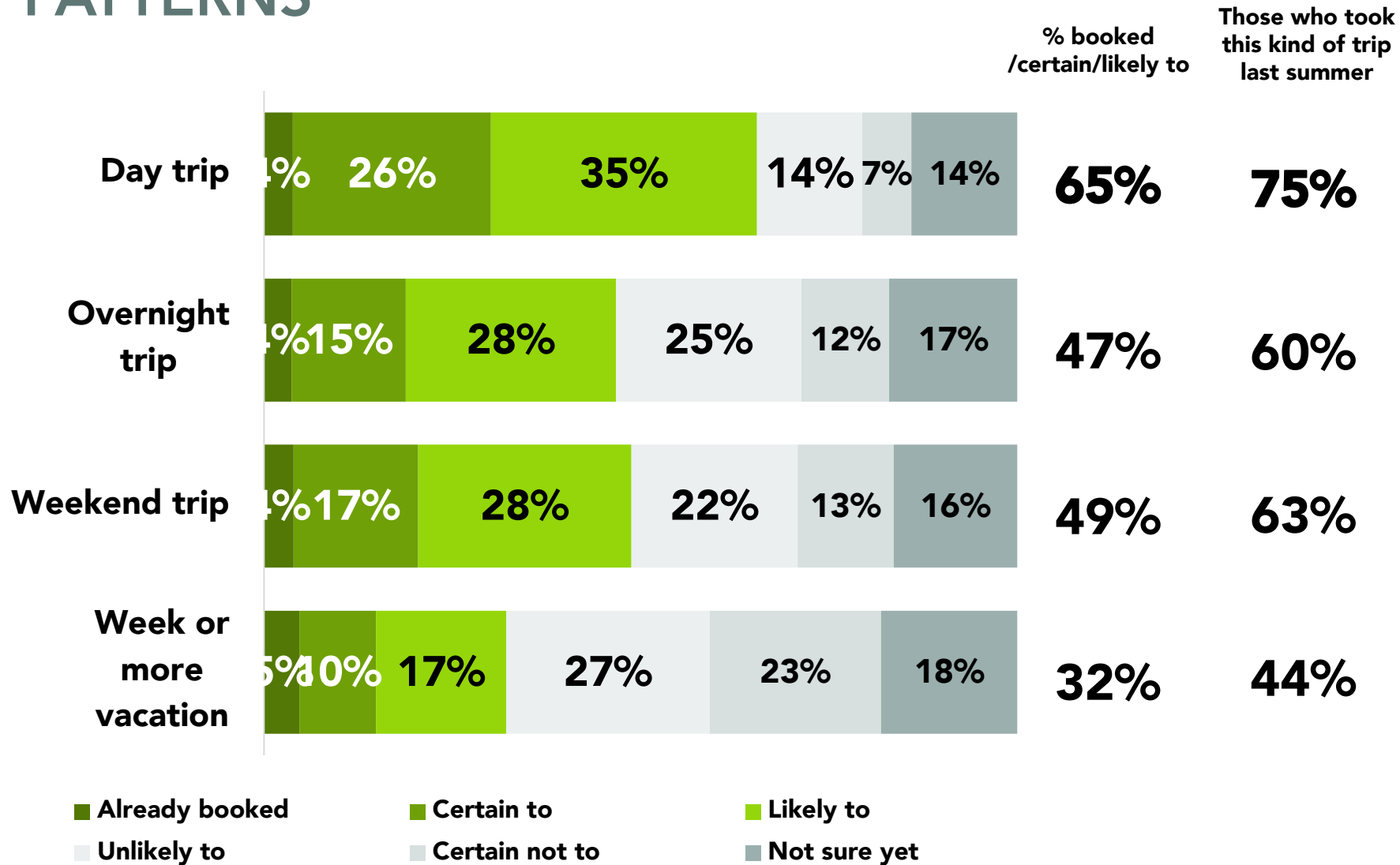


■ Really worried
 ■ Somewhat worried
 ■ A little worried
 ■ Not worried at all

Compared to those who are comfortable with travel, travelers who aren't booking soon have many concerns. They are much more concerned about a spike in infections, a family member/themselves getting COVID, physical distancing and a lack of medical equipment.

To what extent, if at all, are you worried about the following when it comes to the COVID-19 pandemic

TRAVEL: SHORTER, BUT CONSISTENT WITH PAST TRAVEL PATTERNS

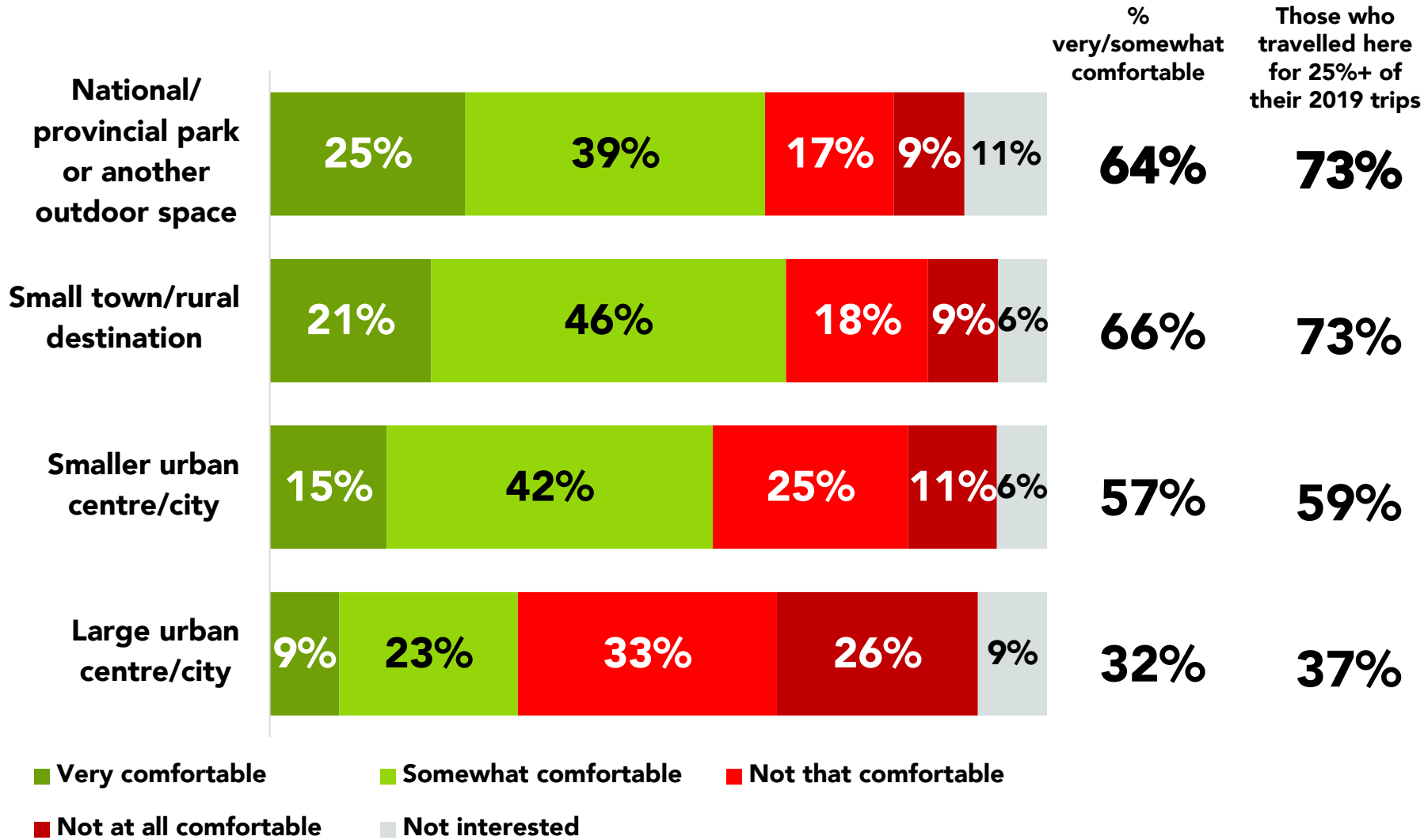


Ontarians are most comfortable with shorter trips this summer.

Likelihood of taking any kind of trip is higher among those who took the same kind of trip last summer (i.e. day trippers last year are more likely to take a day trip this year).

During Summer/Fall 2020, do you think you will take any of the following trips (excluding business travel) to a destination at least 40km+ from where you live and in Ontario

LESS DENSE = MORE POPULAR



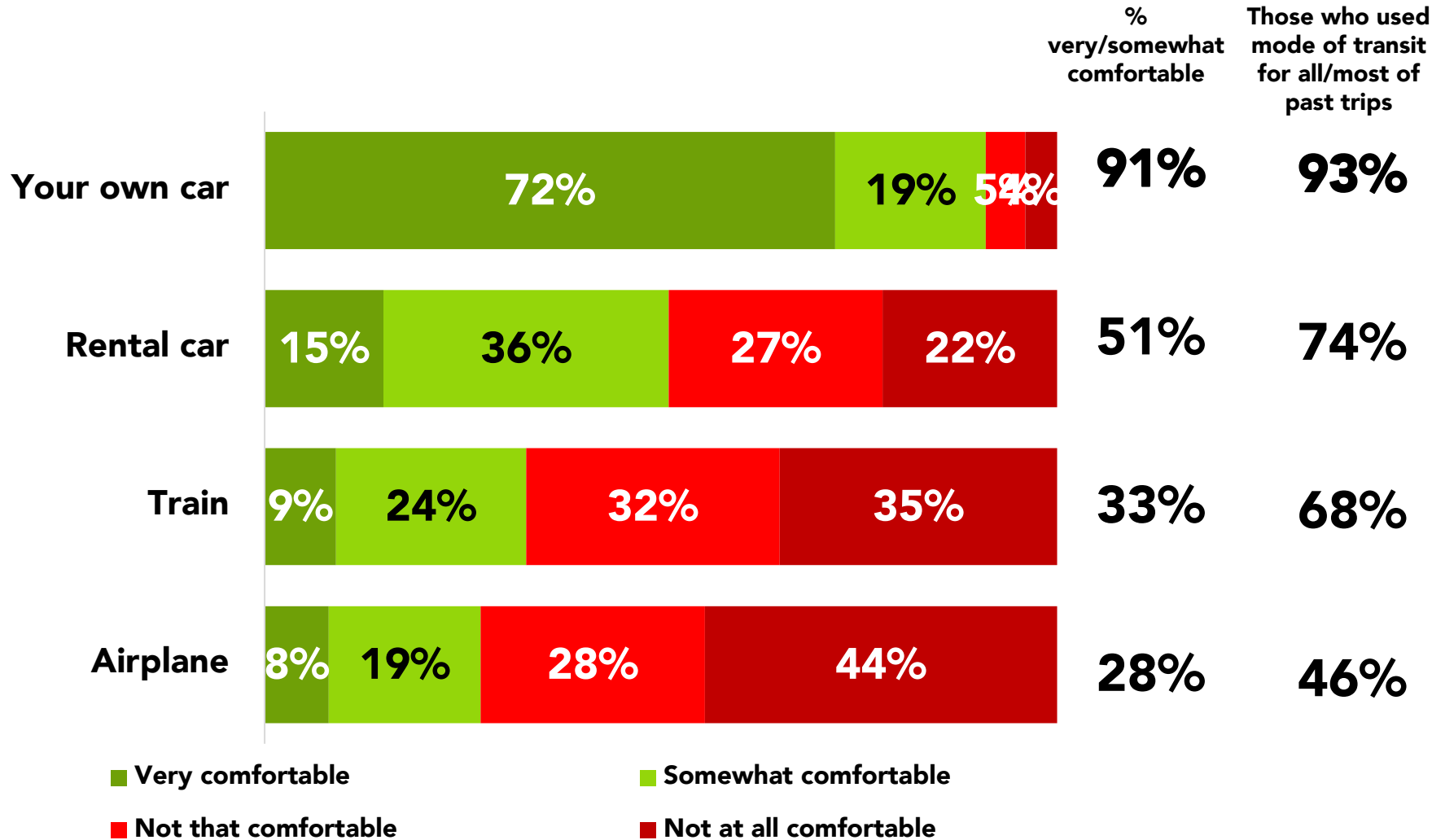
As expected, Ontario travelers are more comfortable with places that offer more space, and less crowds.

Familiarity with the type of location increases comfort slightly, but density still seems to be the biggest driver for comfort.

The comfort level is the same (37%) among those who traveled to large urban centres for 50%+ of their 2019 trips.

During Summer/Fall 2020, how comfortable would you be taking a trip to a

EXTREME HESITATION TO TRAVEL IN ANYTHING OTHER THAN THEIR OWN CAR

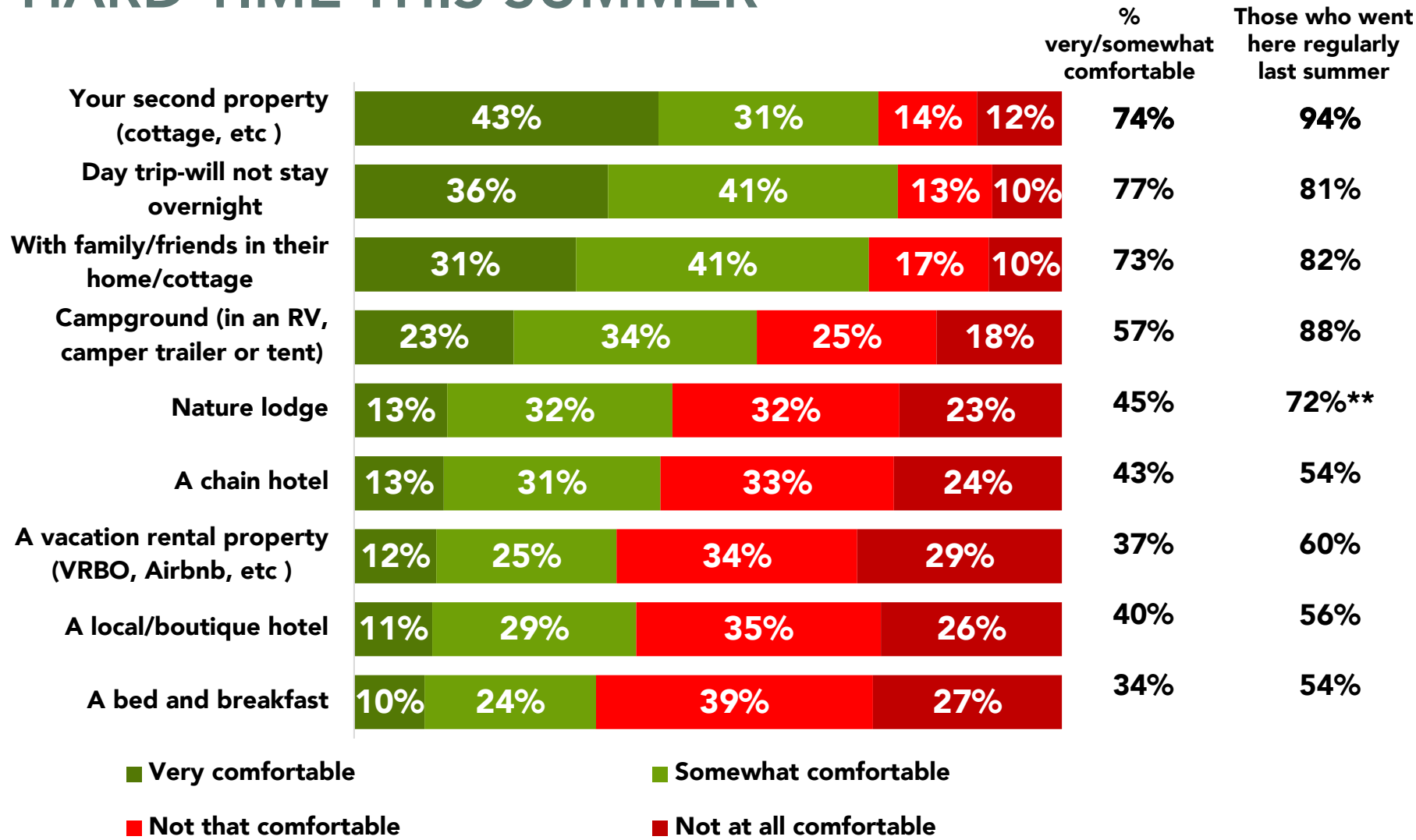


Ontarians are very hesitant to travel in anything other than their own vehicles.

That said, using a mode of transit for most trips in the past increases level of comfort with using it post-COVID.

During Summer/Fall 2020, how comfortable will you be taking the following to travel to your trip destination *not interested removed

SMALLER ACCOMMODATION BUSINESSES WILL LIKELY HAVE A HARD TIME THIS SUMMER



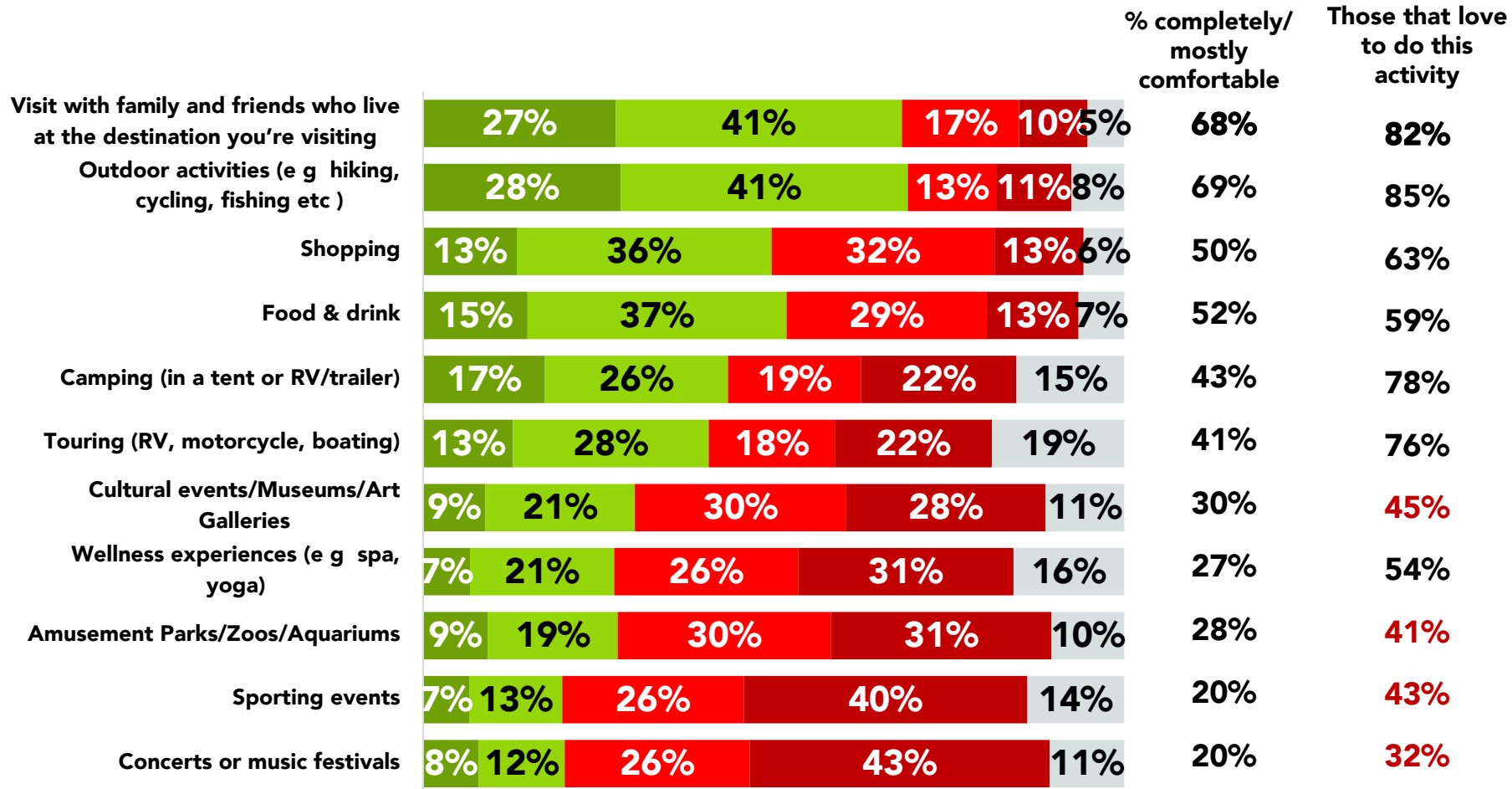
Among those interested in these types of properties, comfort level is highest among accommodations that are privately owned.

Local, smaller scale accommodations will have the most difficulty.

That said, past experience with an accommodation does increase comfort.

During Summer/Fall 2020, how comfortable would you be taking a trip to a ...*not interested removed **SMALL BASE

ACTIVITIES: SMALLER GROUPS, MORE SPACE



■ Completely comfortable
 ■ Mostly comfortable
 ■ Not that comfortable
■ Not comfortable at all
 ■ Not sure yet

Ontario travelers are more comfortable with activities that involve less interaction with people they do not know, and activities that will give them more space.

Love for activities plays a big role in comfort levels.

That said, less than 50% of the following groups are comfortable doing the activities they love:

- Cultural events
- Amusement parks/Zoos/Aquariums
- Sporting events
- Concerts/festivals

During Summer/Fall 2020, to what extent will you feel comfortable, if at all, doing the following activities?

WHAT TO DO INSTEAD?

For some, COVID-19 means they won't be able to do the things they love. Among those who aren't as comfortable doing their regular activities....

THOSE WHO LOVE...	WILL BE OPEN TO THIS INSTEAD...	% COMPLETELY/ MOSTLY COMFORTABLE
CULTURAL EVENTS /MUSEUMS/GALLERIES	<ul style="list-style-type: none"> • OUTDOOR ACTIVITIES • VISIT FAM/FRIENDS • FOOD & DRINK 	74% (+5 FROM AV) 69% (+1 FROM AV) 55% (+3 FROM AV)
AMUSEMENT PARKS/ZOOS/AQUARIUMS	<ul style="list-style-type: none"> • OUTDOOR ACTIVITIES • VISIT FAM/FRIENDS <ul style="list-style-type: none"> • CAMPING • SHOPPING • FOOD & DRINK 	76% (+7 FROM AV) 73% (+5 FROM AV) 51% (+8 FROM AV) 54% (+4 FROM AV) 59% (+7 FROM AV)
SPORTING EVENTS	<ul style="list-style-type: none"> • OUTDOOR ACTIVITIES • VISITING FAM/FRIENDS <ul style="list-style-type: none"> • FOOD & DRINK • SHOPPING • TOURING 	75% (+6 FROM AV) 73% (+5 FROM AV) 61% (+9 FROM AV) 54% (+4 FROM AV) 50% (+9 FROM AV)
CONCERTS/FESTIVALS	<ul style="list-style-type: none"> • VISIT FAMILY/FRIENDS • OUTDOOR ACTIVITIES <ul style="list-style-type: none"> • FOOD & DRINK • SHOPPING • TOURING 	76% (+8 FROM AV) 75% (+6 FROM AV) 61% (+9 FROM AV) 57% (+7 FROM AV) 55% (+14 FROM AV)

During Summer/Fall 2020, to what extent will you feel comfortable, if at all, doing the following activities?

\$ TRIP SPEND PROFILES

	TAKE THE SAME KIND OF TRIP THIS SUMMER? % ALREADY BOOKED/CERTAIN/LIKELY TO	COMFORTABLE WITH DENSITY?	COMFORTABLE STAYING... % VERY/SOMEWHAT COMFORTABLE	WILL MOST LIKELY BE DOING...
ECONOMY OVERNIGHTERS	74% DAY TRIP (+9) 53% OVERNIGHT TRIP (+6)	MORE COMFORTABLE WITH PARKS THAN AVERAGE	N/A	MORE COMFORTABLE WITH OUTDOOR ACTIVITIES, TOURING, VISITING WITH FAMILY/ FRIENDS
PREMIUM OVERNIGHTERS	69% DAY TRIP (+4) 46% OVERNIGHT TRIP (-1)	SLIGHTLY MORE COMFORTABLE WITH URBAN CENTRES, THAN AVERAGE	N/A	NO MORE COMFORTABLE THAN AVERAGE WITH ACTIVITIES
ECONOMY WEEKENDERS	WEEKEND TRIP 63% (+14)	MUCH MORE COMFORTABLE THAN AVERAGE WITH PARKS, SMALL TOWNS, SMALL URBAN CENTRES	THEIR SECOND PROPERTY 81% (+7) WITH FAMILY/FRIENDS 79% (+6) NO MORE COMFORTABLE WITH PUBLIC ACCOMMODATIONS.	MORE COMFORTABLE WITH FOOD/DRINK , TOURING, VISITING FAMILY/FRIENDS, CAMPING AND OUTDOOR ACTIVITIES THAN AVERAGE
PREMIUM WEEKENDERS	WEEKEND TRIP 61% (+12)	SLIGHTLY MORE COMFORTABLE THAN AVERAGE WITH PARKS, SMALL TOWNS, URBAN CENTRES	SLIGHTLY MORE COMFORTABLE WITH CHAIN HOTELS 51% (+8)	NO MORE COMFORTABLE THAN AVERAGE WITH ACTIVITIES
ECONOMY WEEK+	WEEK LONG 44% (+12)	NO MORE COMFORTABLE THAN AVERAGE	SLIGHTLY MORE COMFORTABLE WITH A CAMPGROUND 63% (+6) LESS COMFORTABLE WITH PUBLIC PLACES ESPECIALLY LOCAL BOUTIQUE HOTELS 31% (-9)	NO MORE COMFORTABLE THAN AVERAGE WITH ACTIVITIES
PREMIUM WEEK+	WEEK LONG 44% (+12)	MORE COMFORTABLE WITH URBAN CENTRES, SMALL TOWNS, PARKS	SLIGHTLY MORE COMFORTABLE WITH CHAIN HOTELS 48% (+5)	MORE COMFORTABLE WITH WELLNESS EXPERIENCES 45% (+18)

+/- FROM AVERAGE

LIFE STAGE PROFILES

	WHAT KIND OF TRIP THIS SUMMER? % ALREADY BOOKED/CERTAIN/LIKELY TO	COMFORTABLE WITH DENSITY?	COMFORTABLE STAYING... % VERY/SOMEWHAT COMFORTABLE	WILL MOST LIKELY BE DOING...
MILLENNIAL URBANITES	MORE LIKELY TO TAKE A WEEK-LONG TRIP 42% (+10)	NO MORE OR LESS COMFORTABLE THAN AVERAGE WITH DIFFERENT DENSITIES	LESS COMFORTABLE THAN AVERAGE WITH SECOND PROPERTIES 65% (-9), DAY TRIPS 68% (-9)	MORE COMFORTABLE WITH PARKS/ZOOS/AQUARIUMS
RETIREEES	MUCH LESS LIKELY TO TAKE A WEEK LONG TRIP 23% (-9), WEEKEND TRIP 41% (-8) SLIGHTLY MORE IN FAVOUR OF DAY TRIPS 70% (+5)	MUCH LESS COMFORTABLE WITH LARGE URBAN CENTRES 24% (-8), PARKS 57% (-7)	LESS COMFORTABLE WITH B&BS 23% (-9)	LESS COMFORTABLE WITH CAMPING, PARKS/ZOOS/AQUARIUMS, SPORTING EVENTS, WELLNESS EXPERIENCES, CONCERTS

+/- FROM AVERAGE

A dark, atmospheric photograph of an airport terminal. In the foreground on the right, a black rolling suitcase stands upright. The background shows a busy airport with people walking, sitting on chairs, and standing near check-in counters. There are large structural columns and digital display screens. The overall lighting is dim, creating a moody and somewhat somber atmosphere.

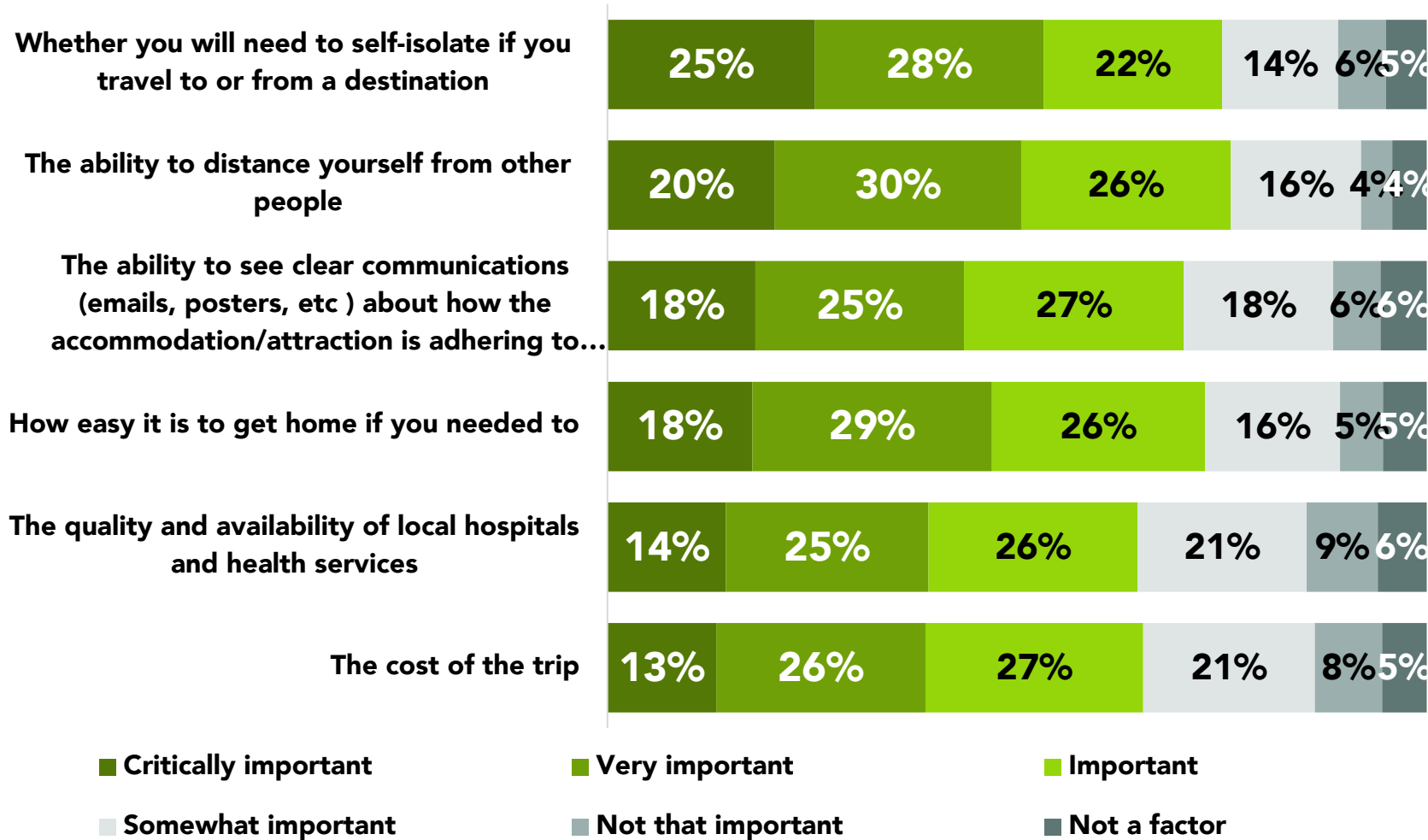
POST COVID EXPECTATIONS

POST-COVID EXPECTATIONS

- There are 5 main types of concern related to COVID-19. Ability to physically distance, ease of returning home, knowing the operator will adhere to public health recommendations.
 - Ontarians feel most strongly about being able to follow COVID-19 protocols and communications, and their familiarity with a destination.
- There is definite overlap amongst the groups who hold each of these concerns. Those who are concerned about physical distancing are also highly concerned about protocols (82%), being close to home (65%). Those who are concerned about being close to home also have concerns about following protocols (83% of this group).

<i>IMPORTANCE OF THE FOLLOWING AS A RESULT OF COVID-19...</i>	<i>% OF POPULATION FOR WHICH THIS IS AN IMPORTANT CONCERN</i>
PHYSICAL DISTANCING	53%
BEING CLOSE TO HOME	45%
COVID-19 PROCEDURES AND COMMUNICATIONS	61%
FAMILIARITY WITH AN ATTRACTION/ ACCOMMODATION	54%
COST	45%

TRAVEL EXPECTATIONS HEAVILY INFLUENCED BY COVID-19 EXPERIENCE

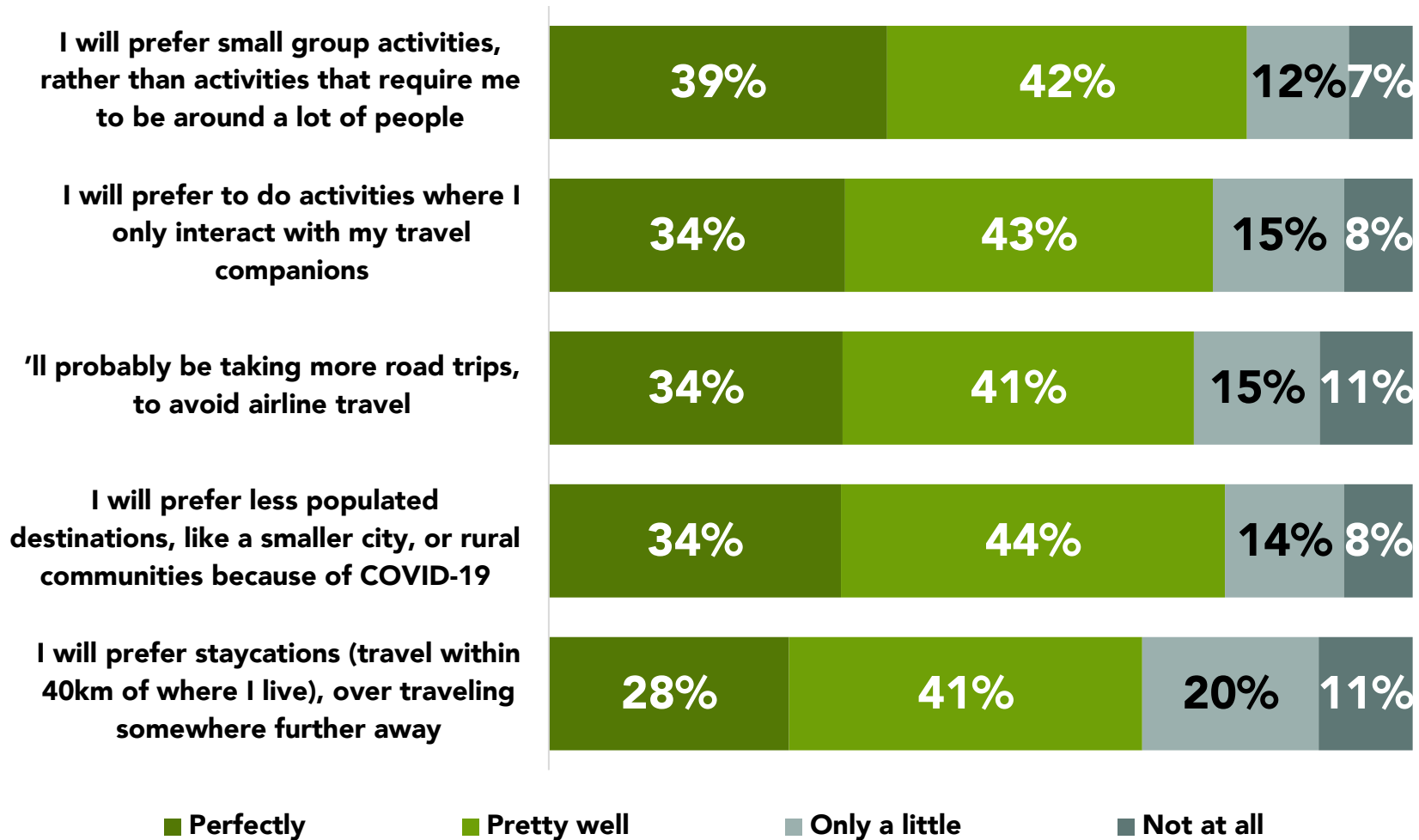


Travelers are expecting that they can continue to adhere to public health advice, even when they travel. And they expect operators to assist them with meeting these expectations.

While cost is still a factor, it certainly is not the driving factor for decision making this summer.

When deciding where to go and what to do for travel this summer, how important, if at all, will the following factors be in your decision making?

WITH LIFTED TRAVEL RESTRICTIONS BUT NO VACCINE...

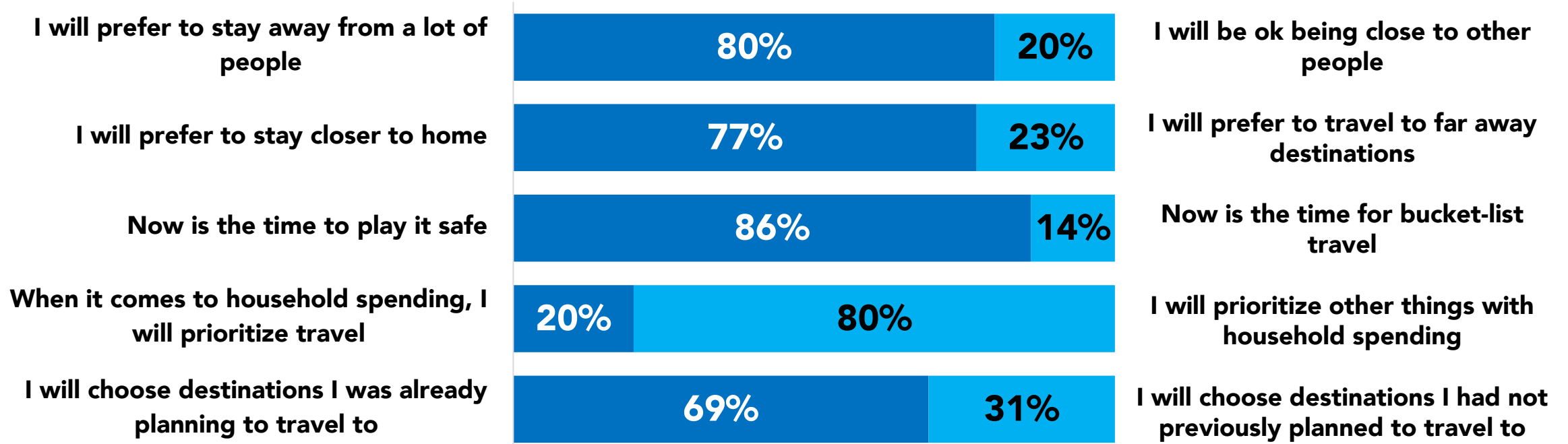


Travel decisions will be based on:

- Least number of interactions with strangers
- Less dense activities/destinations
- Proximity to your home

Imagine that travel restrictions are now lifted, and public health officials say that you can travel but need to still be careful and try to distance yourself from others. There is also no vaccine yet for COVID-19. Do the following describe your thinking perfectly, pretty well, only a little, or not at all?

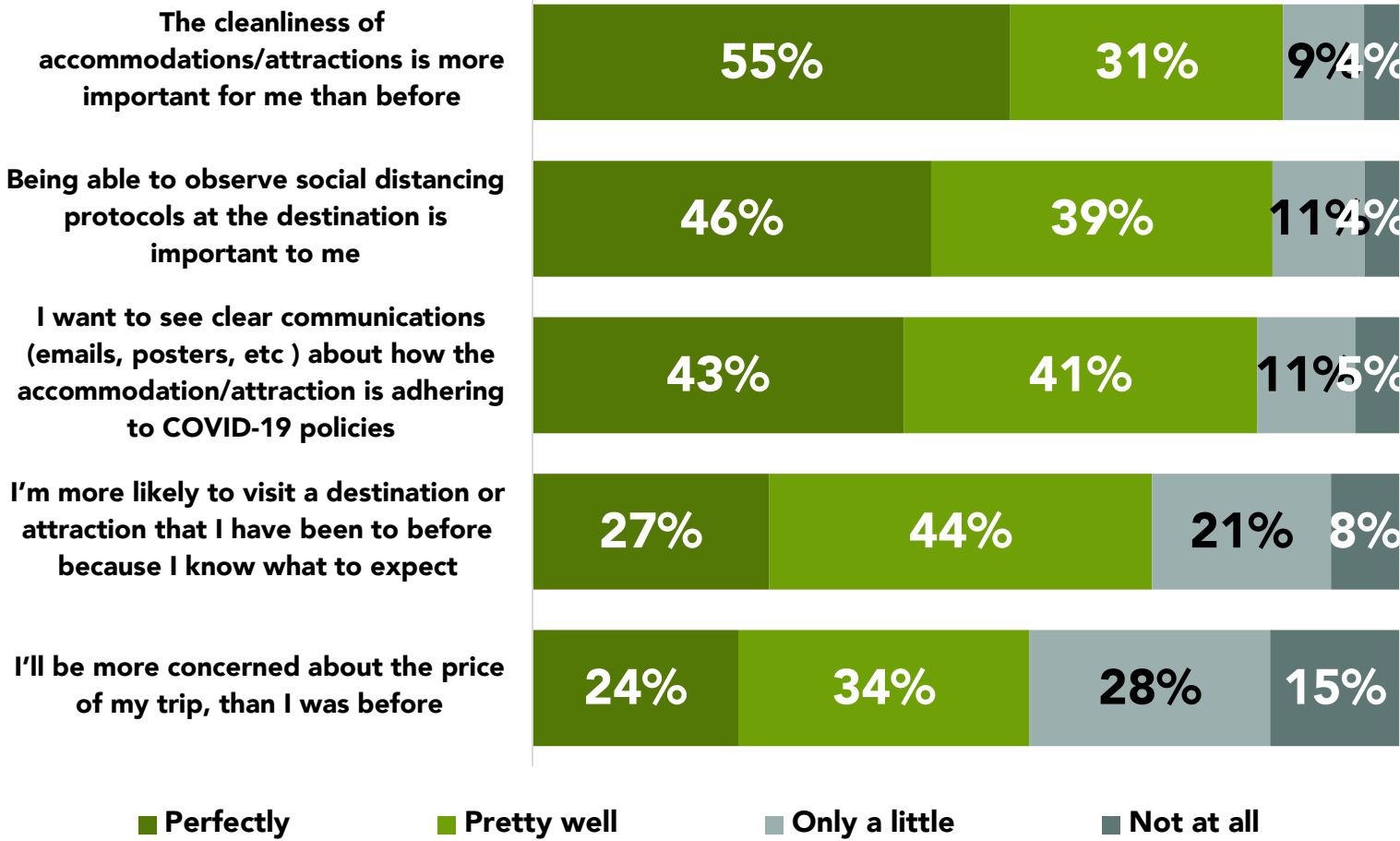
TRAVEL DECISIONS BASED ON MINIMIZING RISK



Again, proximity to home and small groups are key.
Right now, familiarity is also important (69% will travel to destinations they were already planning on).
Travel is also not a big financial priority.

86% say right now is the time to play it safe.

TRAVELERS WANT TO HEAR ABOUT, AND BE ABLE TO ADHERE TO PUBLIC HEALTH ADVICE



For travelers to consider booking everything they will need to be ensured about:

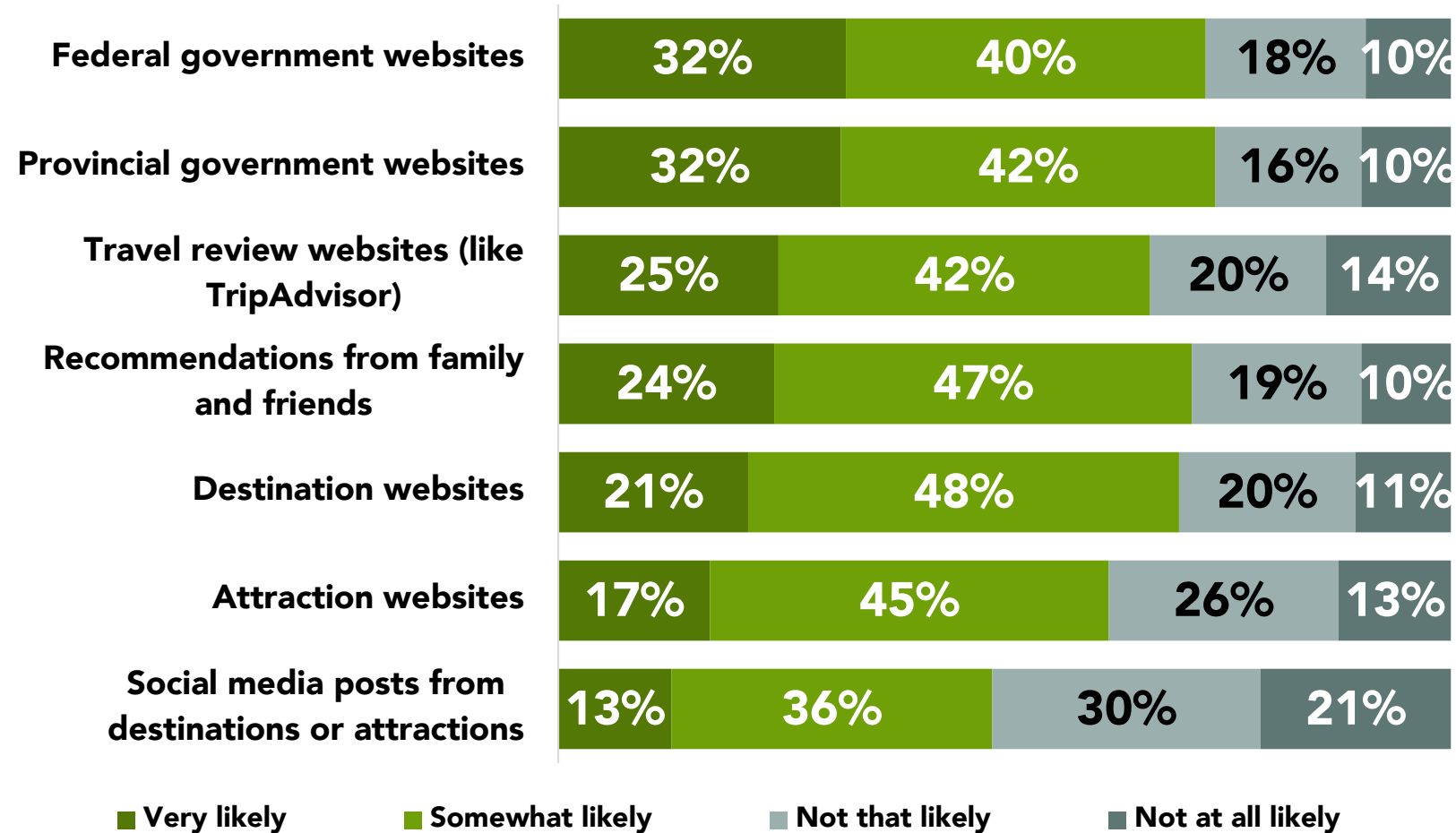
- Cleanliness
- How physical distancing protocol can be met

Familiarity of a destination plays a key role, because they can picture how these expectations might be met.

Aside from public health expectations, cost expectations have shifted as well. Around half say they will be paying more attention to costs post-COVID.

Thinking about the upcoming summer and fall, compared to your travel habits last year, are you more or less likely to choose the following travel destinations this sum

TURN TO SOURCES THAT ARE OFFICIAL, FAMILIAR



Official government websites will be the most likely sources of information.

Next is crowd-sourced information (from review sites) or recommendations from someone they know.

Information from destination and attraction websites will be used the least, in particular information posted to social media.

When looking for information on how/where to travel in a post COVID-19 world, which sources will you likely use

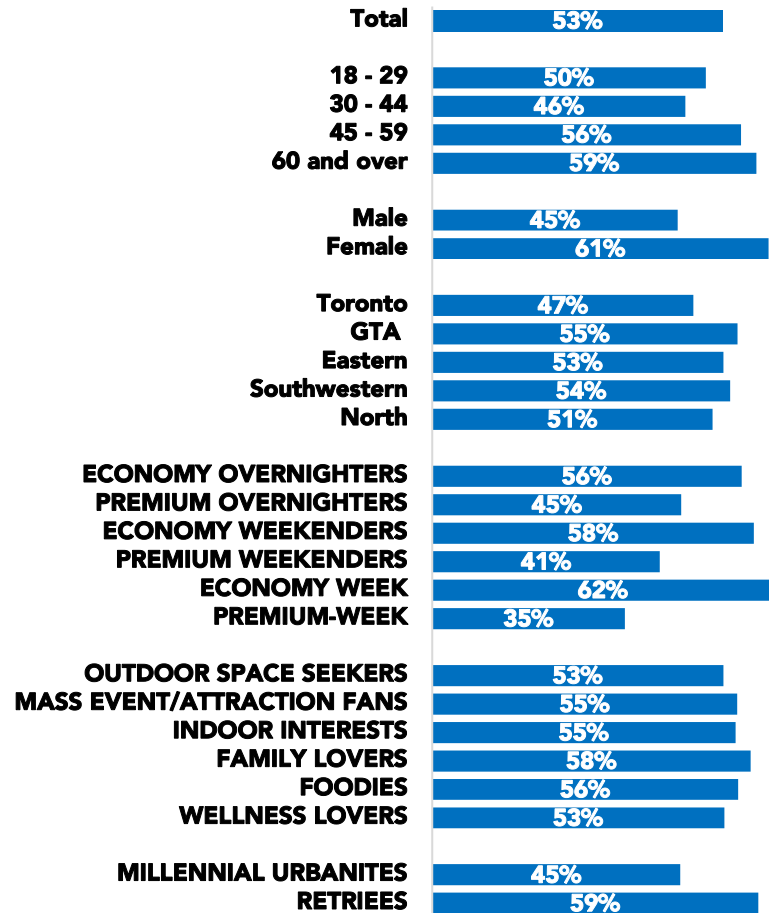
CONCERN PROFILES

IMPORTANCE OF THE FOLLOWING AS A RESULT OF COVID-19...	% OF POP FOR WHICH THIS IS A CONCERN	% OF POP FOR WHICH THIS IS A MAJOR CONCERN	DESCRIPTION OF VERY CONCERNED
PHYSICAL DISTANCING	53%	15%	VERY/CRITICALLY IMPORTANT: THE ABILITY TO SOCIAL DISTANCE FROM OTHER PEOPLE DESCRIBES THEM PERFECTLY: PREFER SMALL GROUP ACTIVITIES, PREFER ACTIVITIES WHERE THEY ONLY INTERACT WITH A SMALL GROUP BEING ABLE TO OBSERVE PHYSICAL DISTANCING AT DESTINATION IS IMPORTANT TO THEM
BEING CLOSE TO HOME	45%	16%	VERY/CRITICALLY IMPORTANT: HOW EASY IT IS TO GET HOME DESCRIBES THEM PERFECTLY: PREFER STAYCATIONS WILL PREFER TO STAY CLOSER TO HOME
COVID-19 PROCEDURES AND COMMS	61%	26%	VERY/CRITICALLY IMPORTANT: THE ABILITY TO SEE CLEAR COMMUNICATIONS DESCRIBES THEM PERFECTLY: WANT TO SEE CLEAR COMMUNICATIONS ADHERING TO PROTOCOL, ACTUAL CLEANLINESS OF ACCOMMODATION
FAMILIARITY	54%	22%	DESCRIBES THEM PERFECTLY: MORE LIKELY TO VISIT SOMEWHERE THEY HAVE BEEN BEFORE, WILL CHOOSE DESTINATIONS THEY WERE ALREADY PLANNING ON TRAVELLING TO
COST	45%	16%	VERY/CRITICALLY IMPORTANT: THE COST OF THE TRIP, DESCRIBES THEM PERFECTLY: MORE CONCERNED ABOUT THE PRICE OF THE TRIP

CONCERNED BY PROFILES

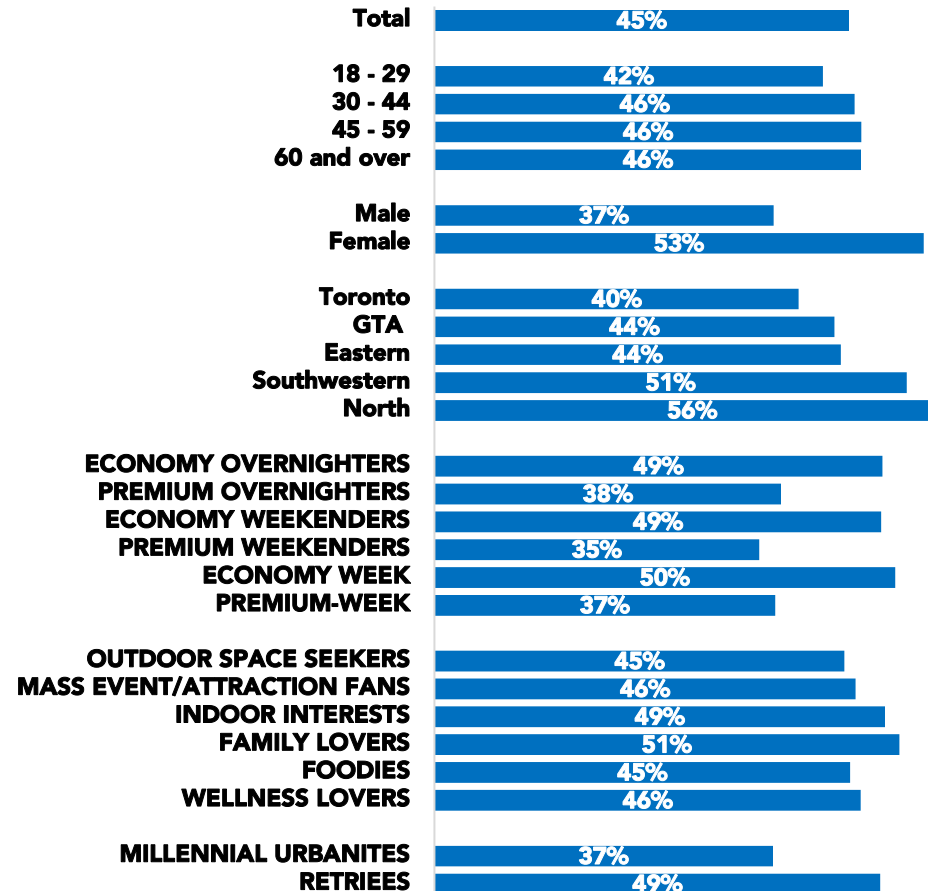
PHYSICAL DISTANCING

Physical distancing: older travelers, female travelers and economy travelers are most concerned, as are retirees. Interestingly, those who prefer indoor activities are no more concerned about physical distancing than those who like outdoor activities.



BEING CLOSE TO HOME

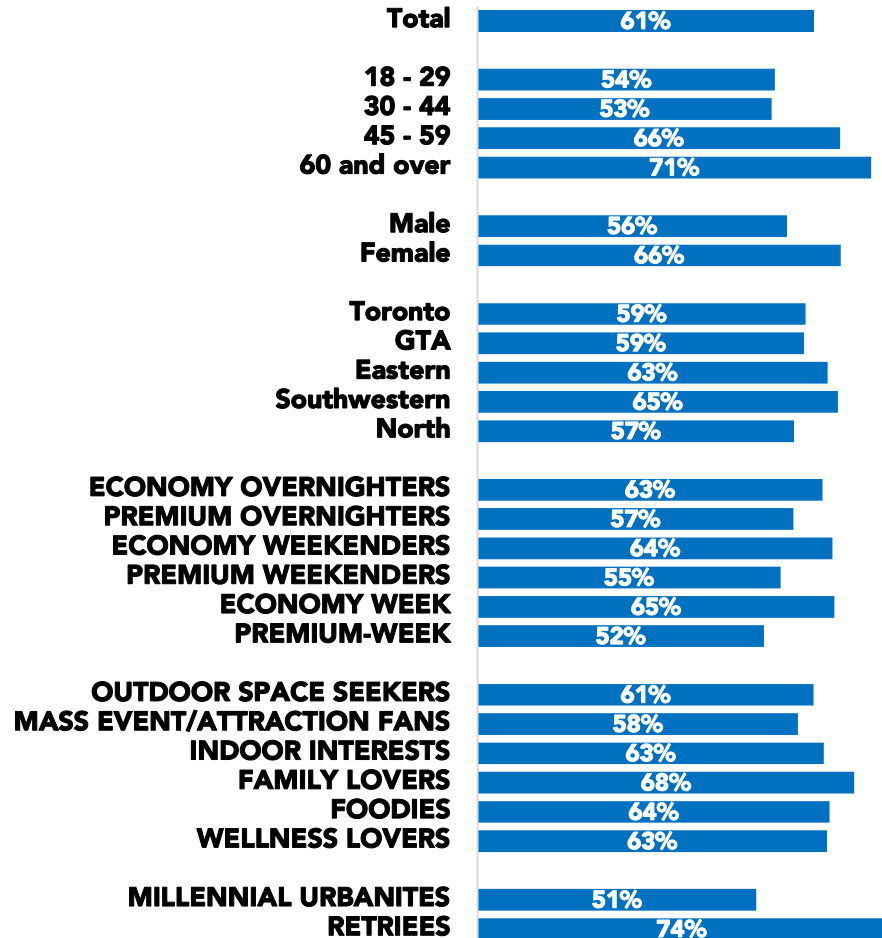
Being close to home is also more concerned for older, female, economy budget travelers and retirees. It's a bit more of a concern from those with indoor interests, and visiting family.



CONCERNED BY PROFILES

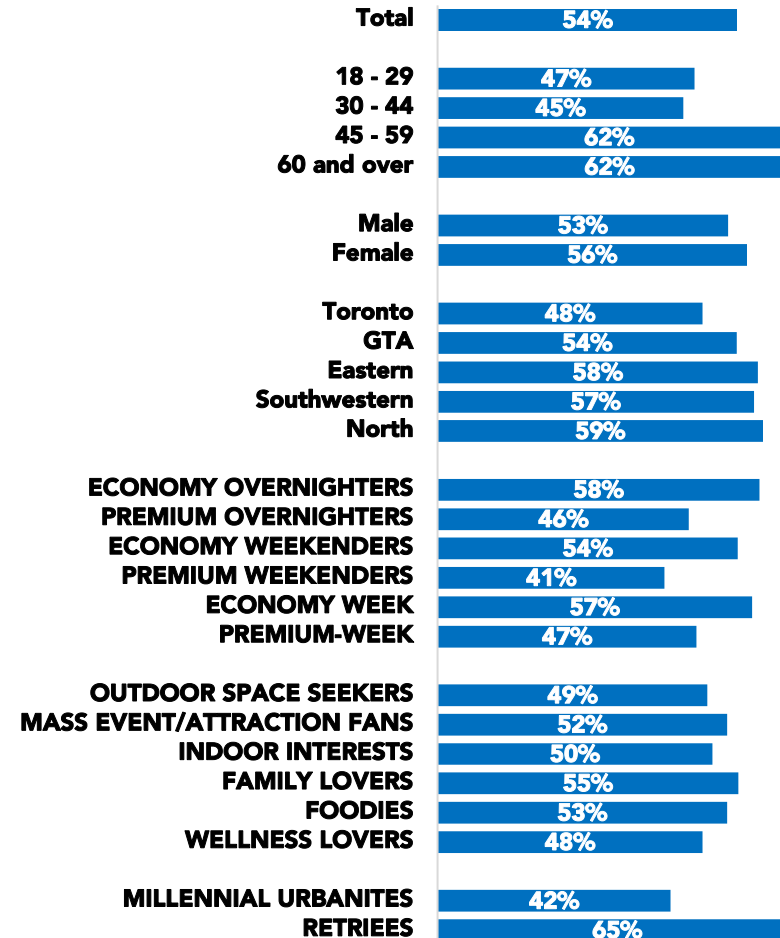
PROTOCOLS-PROCEDURES AND COMMS

These are a bigger concern for older travelers, female travelers, economy travelers and retirees. And slightly more of a concern among family lovers.



FAMILIARITY

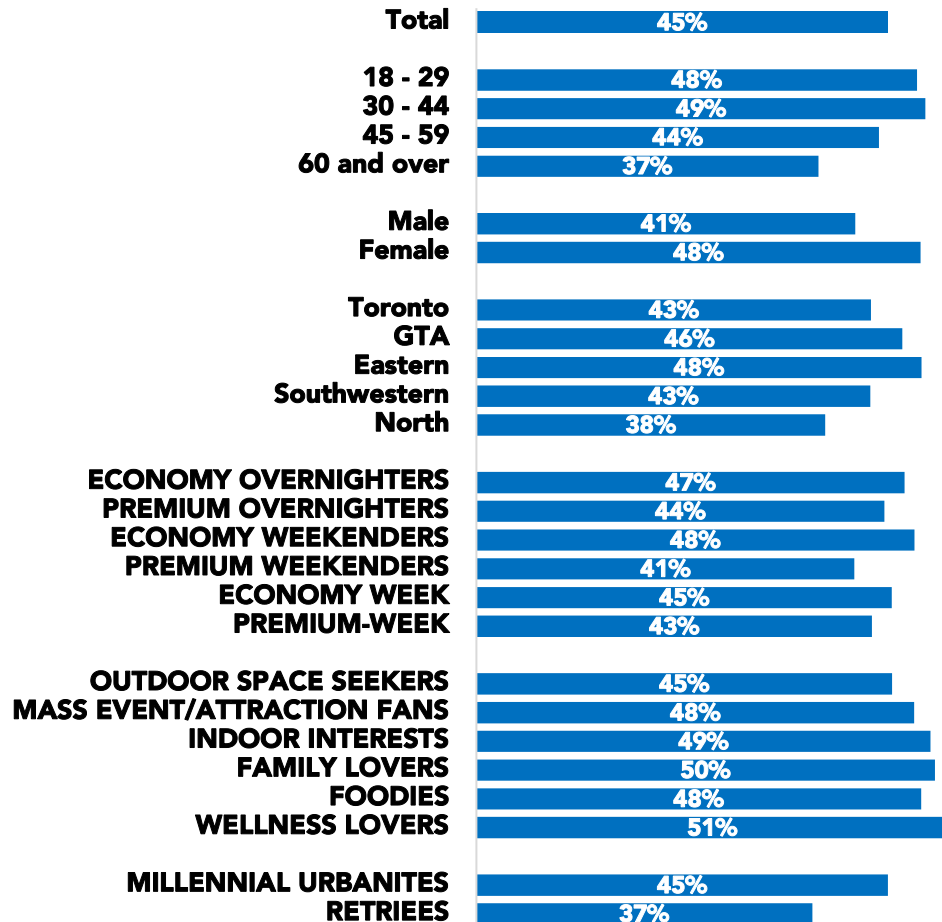
As with the others, this is a bigger concern with older travelers, economy travelers and retirees.



CONCERNED BY PROFILES

COST

Unlike other concerns, cost is a bigger concern for younger travelers, including millennials urbanites. It is still a bigger concern for women than men, but concern is more equally divided amongst economy and premium travelers.



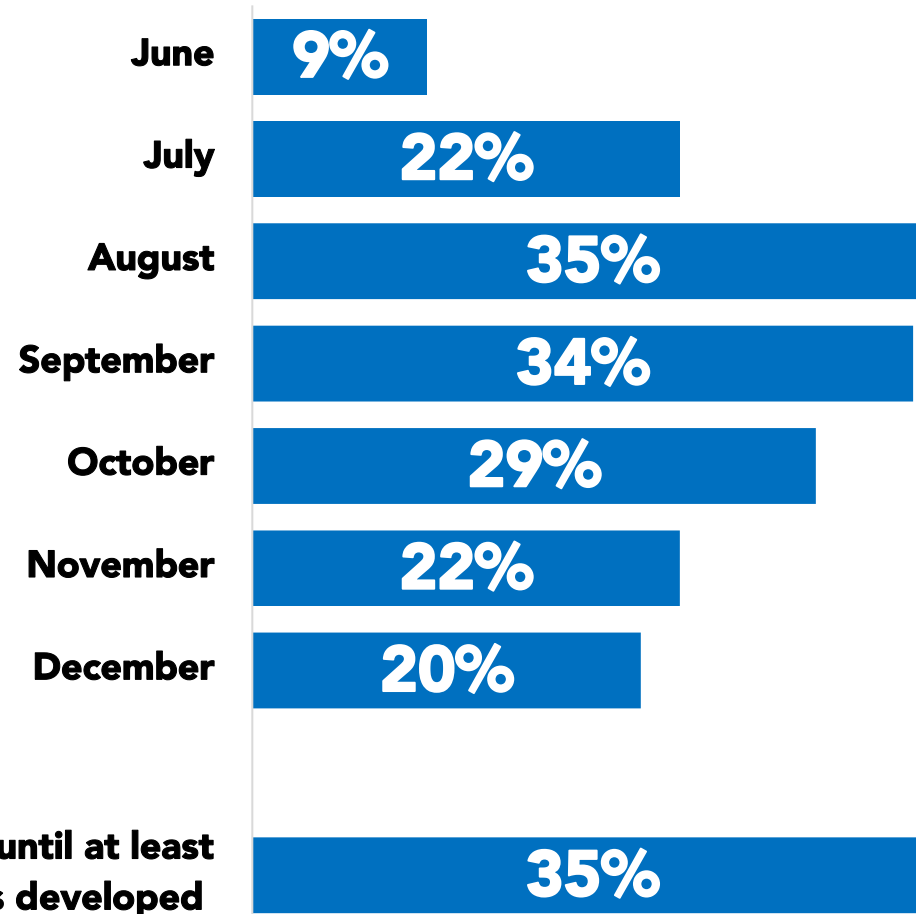
A dark, atmospheric photograph of an airport terminal. In the foreground, a black rolling suitcase stands upright on the right side. The background shows a busy airport with people sitting on chairs, walking, and standing near information screens. The lighting is dim, creating a moody and somewhat somber atmosphere. The overall scene suggests a travel-related context.

TRAVEL PLANS: ONTARIO

TRAVEL PLANS: ONTARIO

- **Ontarian travelers are most comfortable making a trip in Ontario sometime in August or September, not too far into the future but still allowing for restrictions to lift.**
 - **That said 35% said they will not feel comfortable travelling until at least 2021/when a vaccine is developed.**
- **One in ten have already made a booking for post-COVID travel but most are still quite hesitant. Only 25% have started planning a trip. And the remain 67% aren't even making plans.**

COMFORTABLE TRAVELING NOT TOO SOON, NOT TOO LATE

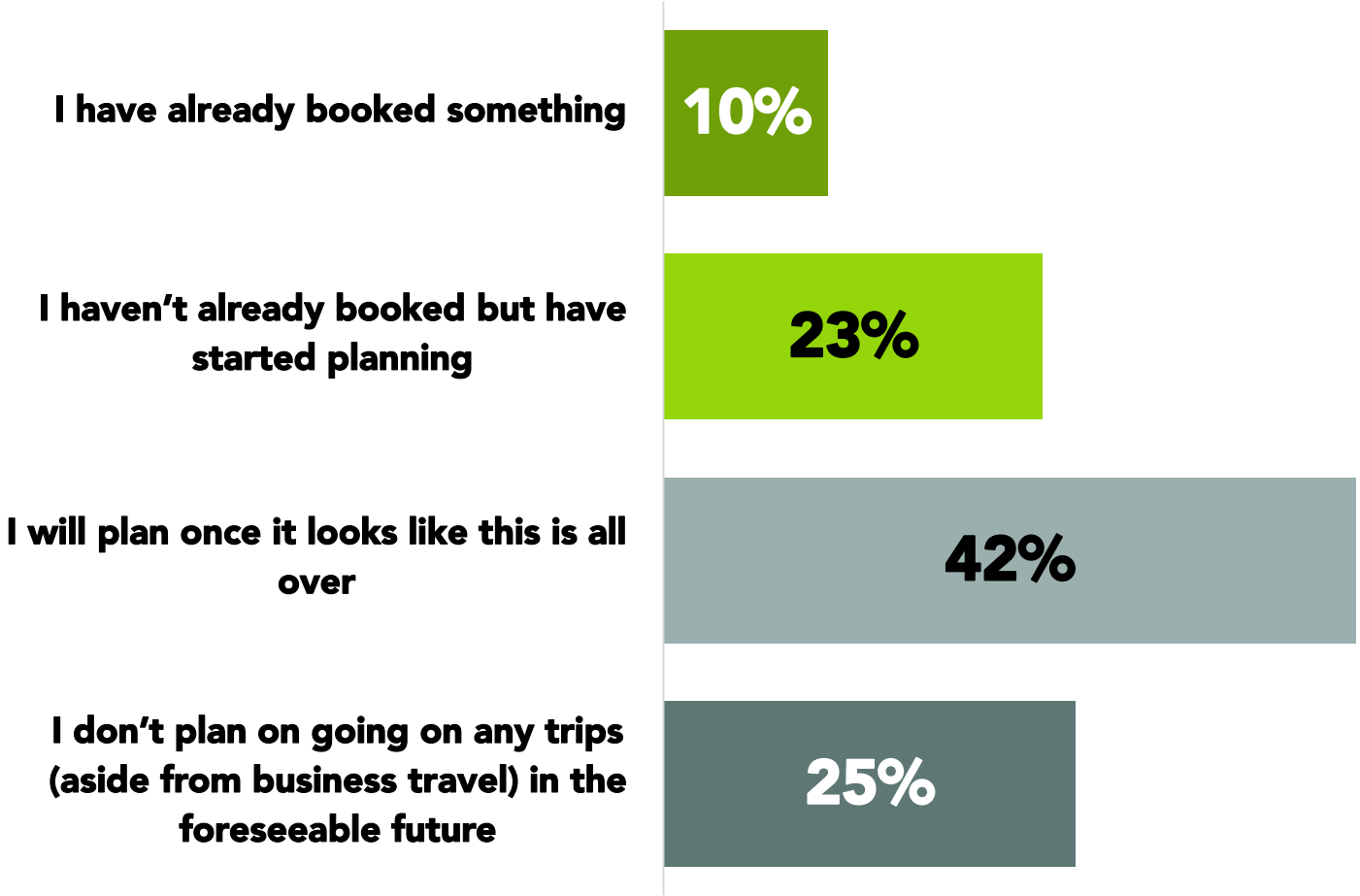


Comfort is highest in August and September, enough time into the future to allow for loosened regulations, but not too far into the unknown future.

That said, a third won't be comfortable to book until 2021, or a vaccine is found.

As of right now, which months of the year do you feel comfortable making travel plans to a destination in Ontario? Select all that apply

ONE IN TEN HAVE ALREADY BOOKED, MOST WAITING IT OUT

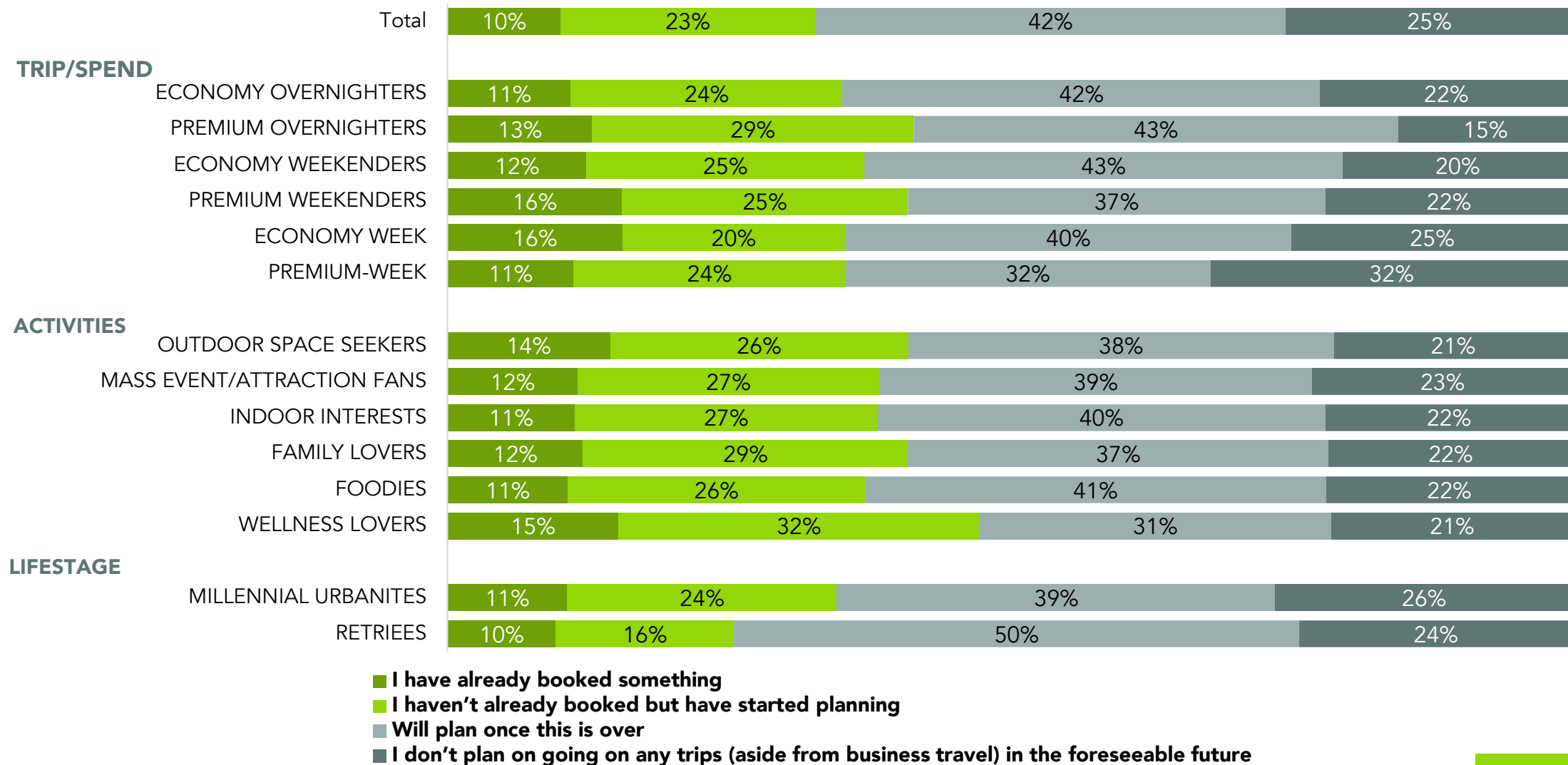


Very few have actually booked travel so far.

Most haven't even started making plans.

Have you booked future travel plans (aside from business travel) or talked about future travel plans with your family or friends for when the COVID-19 pandemic is over?

FUTURE TRAVEL BOOKINGS



Have you booked future travel plans (aside from business travel) or talked about future travel plans with your family or friends for when the COVID-19 pandemic is over?

BOOKED A TRIP TO ONTARIO?

Of the 10% who have already booked...

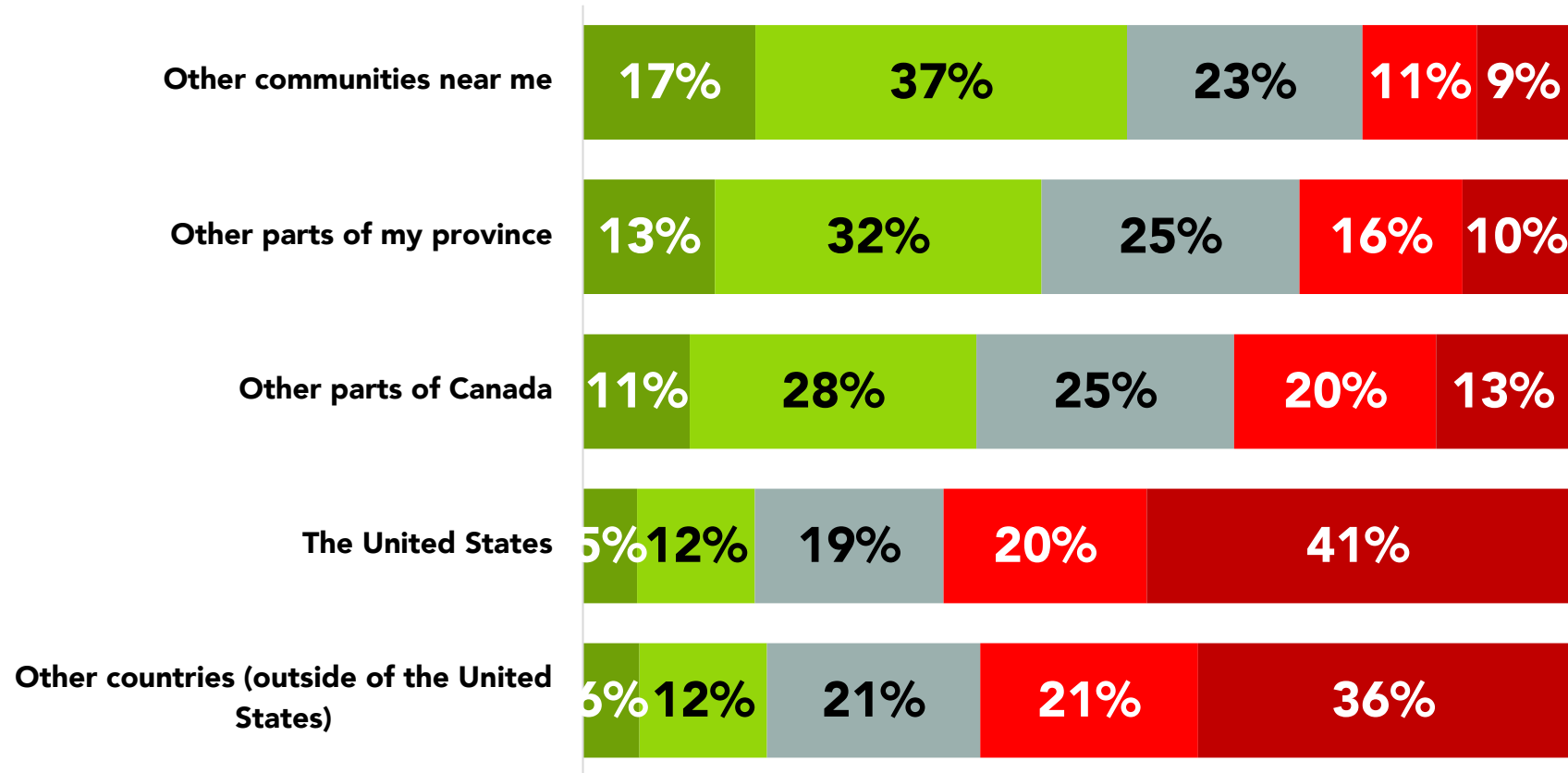
63% have booked a trip to a destination in Ontario.

They are planning on travelling to...



Did you book a trip within Ontario within the next 6 months?/Where in Ontario did you book a vacation or trip? n=186

I WOULD WELCOME VISITORS TRAVELING TO MY COMMUNITY FROM...



■ Strongly agree
 ■ Somewhat agree
 ■ Neither agree nor disagree
 ■ Somewhat disagree
 ■ Strongly disagree

In general, Ontarian travelers are not very comfortable with anyone travelling.

Only half say they would welcome people from communities near them.

Fewer still are comfortable with welcoming travelers from other parts of the province/country.

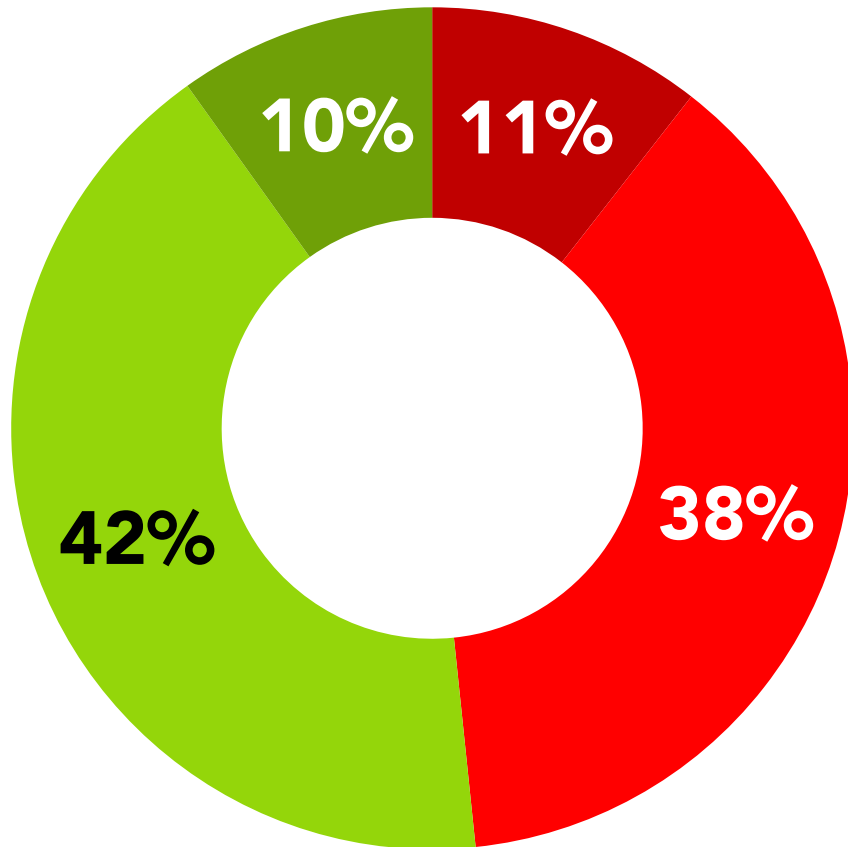
61% would not welcome visitors from the US.

I would welcome visitors travelling to my community from X: Once travel restrictions are lifted, to what extent do you agree or disagree with each of the following statements

A dark, atmospheric photograph of an airport terminal. In the foreground, a black rolling suitcase stands upright on the right side. The background shows a busy airport with people sitting on chairs, walking, and standing near information screens. The lighting is dim, creating a moody and somewhat somber atmosphere. The text 'APPENDIX: WINNIPEG TRAVELERS' is overlaid in large, bold, light blue letters across the center of the image.

APPENDIX: WINNIPEG TRAVELERS

MOST ARE WORRIED ABOUT THE PANDEMIC

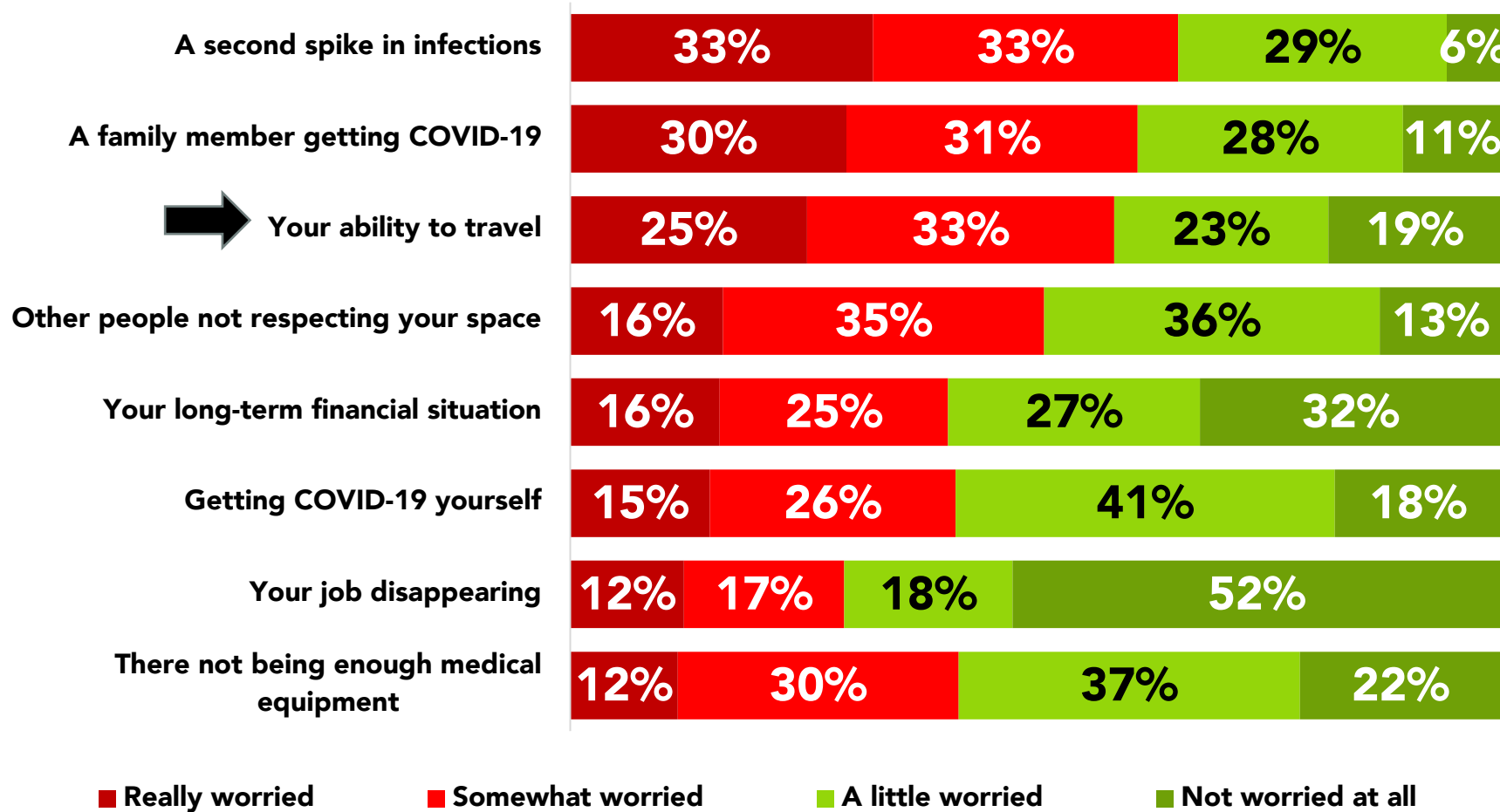


■ Really worried ■ Somewhat worried ■ A little worried ■ Not worried at all

48% of Winnipeg travelers say coronavirus is making them worried. Slightly lower than Ontario travelers.

Overall, how worried, if at all, is the situation with the coronavirus or COVID-19 making you right now?/To what extent, if at all, are you worried about the following when it comes to the COVID-19 pandemic

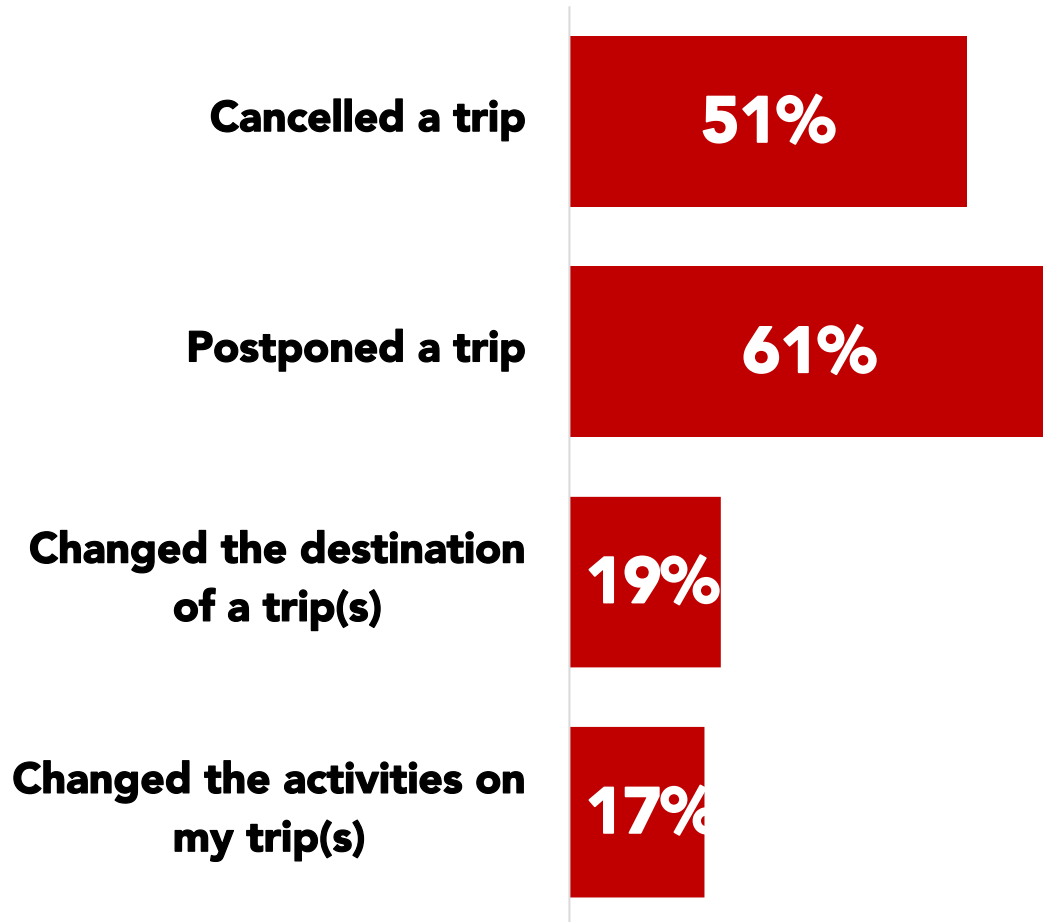
TO WHAT EXTENT ARE YOU WORRIED ABOUT THE FOLLOWING...



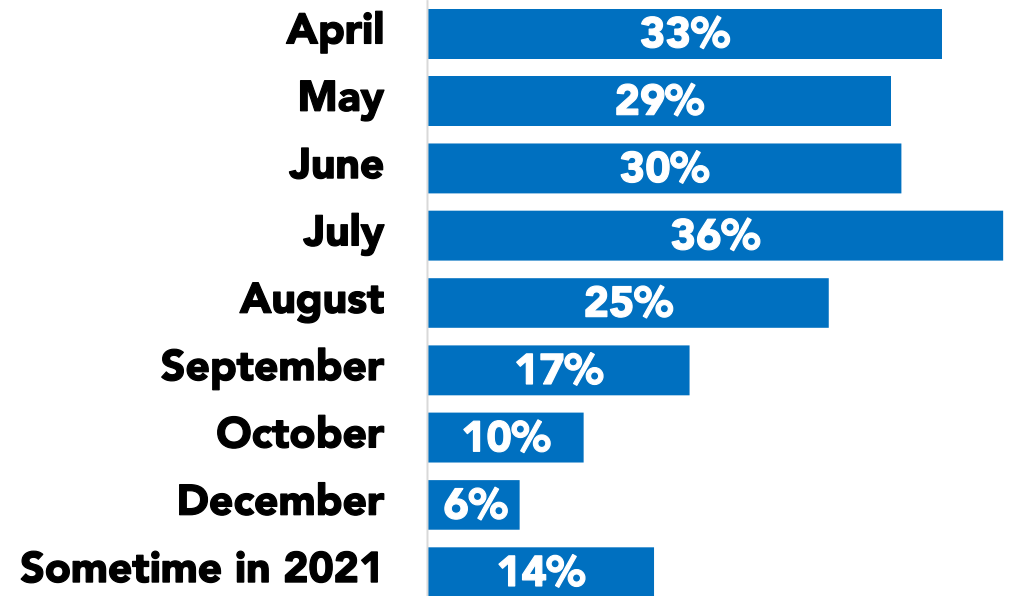
They are still worried but feel less strongly about: people not respecting their space, their financial situation, compared to Ontarians. They are just as worried about travel prospects as Ontarians.

To what extent, if at all, are you worried about the following when it comes to the COVID-19 pandemic

SIGNIFICANT IMPACT TO TRAVEL PLANS



Fewer have cancelled a trip due to the pandemic 51% vs 57%. Still, half have cancelled and two-thirds have postponed at least one trip. Twice as many Winnipeg travelers say they cancelled a trip in 2021, compared to those in Ontario.



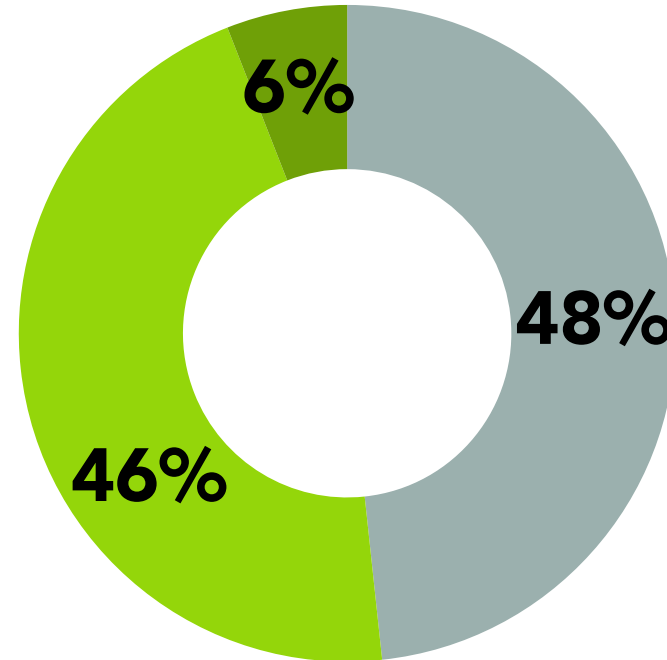
Due to the coronavirus outbreak have you had to do any of the following.../Of the trips that you cancelled/postponed, which month(s) were they scheduled to take place? Please select all that apply

POST-COVID TRAVEL COMFORT

■ I'll test the waters first

■ I'll get back in but carefully

■ I'll jump right back in



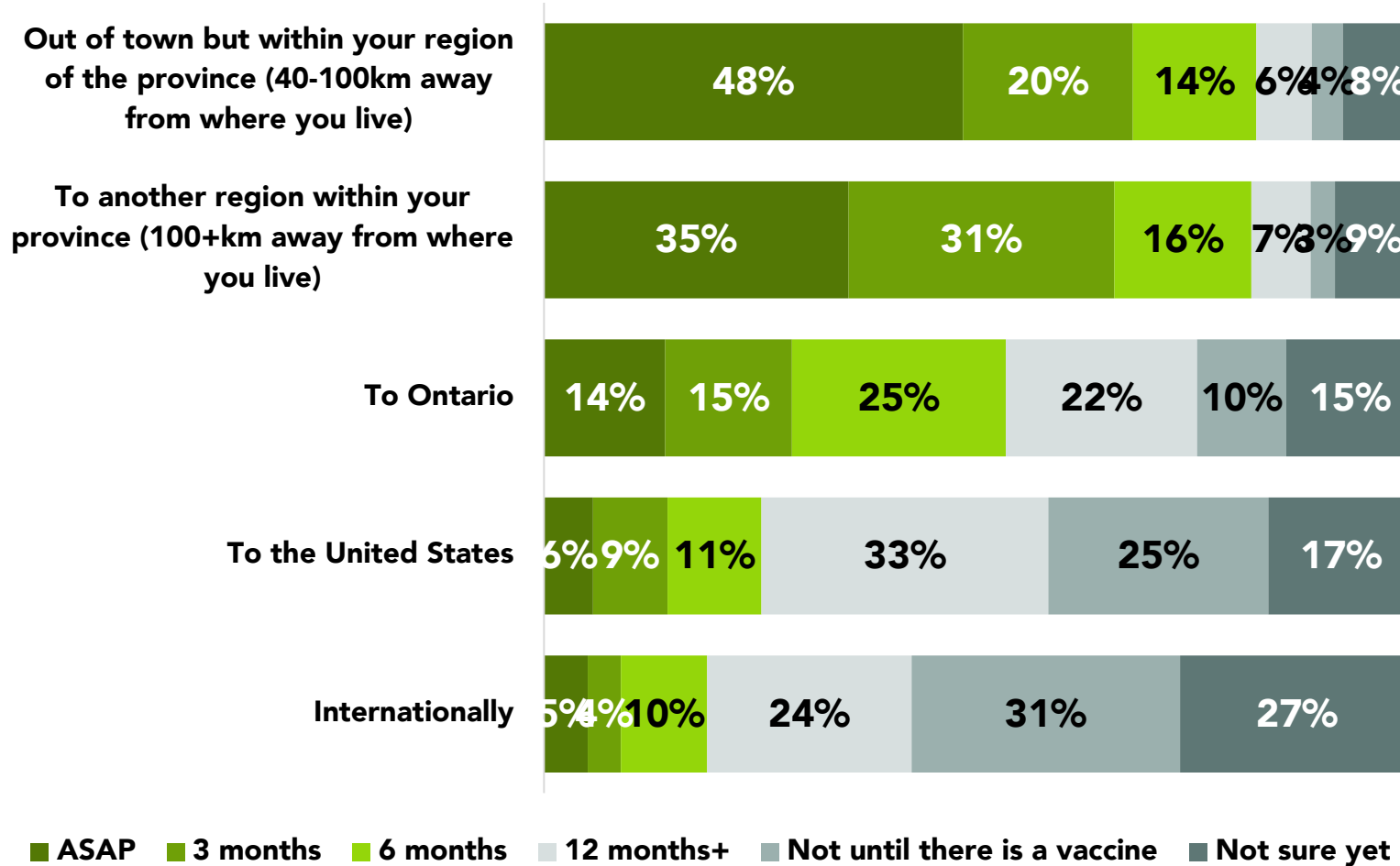
Few Winnipeg travelers are eager to get back into their travel habits.

Only 6% are likely to resume their pre-COVID travel habits ASAP.

They are just as eager to travel as Ontario travelers.

What best describes how you feel about travelling now as physical distancing restrictions start to be lifted

TIME HORIZON FOR DIFFERENT DESTINATIONS



Within the next 3 months, 29% would be comfortable making a trip to Ontario.

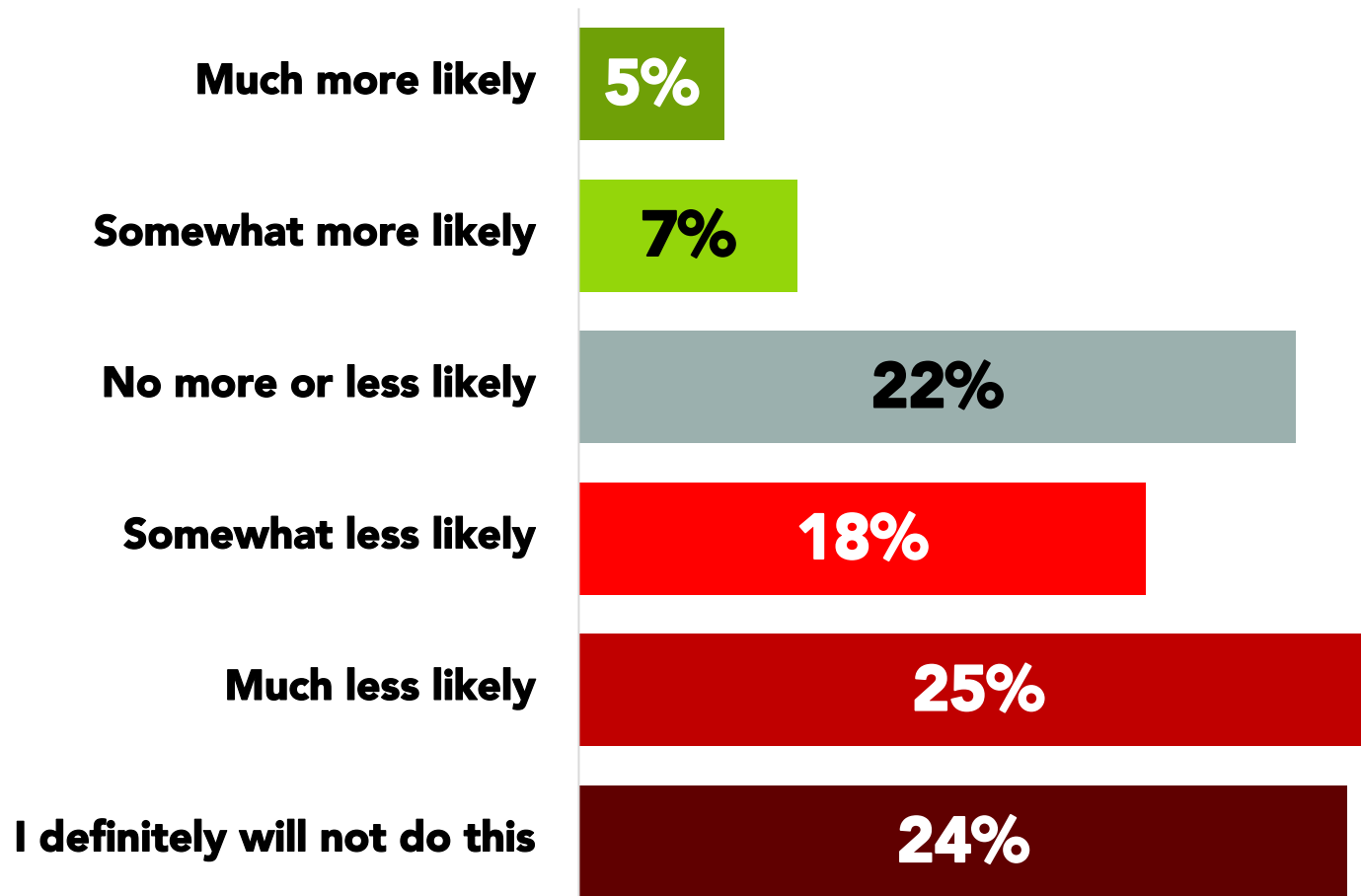
Compared to Ontarians they are much more likely to be traveling within their province ASAP.

48% say they will travel within their region ASAP (33% of Ontarians say the same).

35% say they will travel to another region in their province ASAP (23% among Ontarians).

Once travel restrictions are lifted, how long will it be before you feel comfortable travelling *not interested removed

TRAVEL TO ONTARIO THIS SUMMER/FALL?



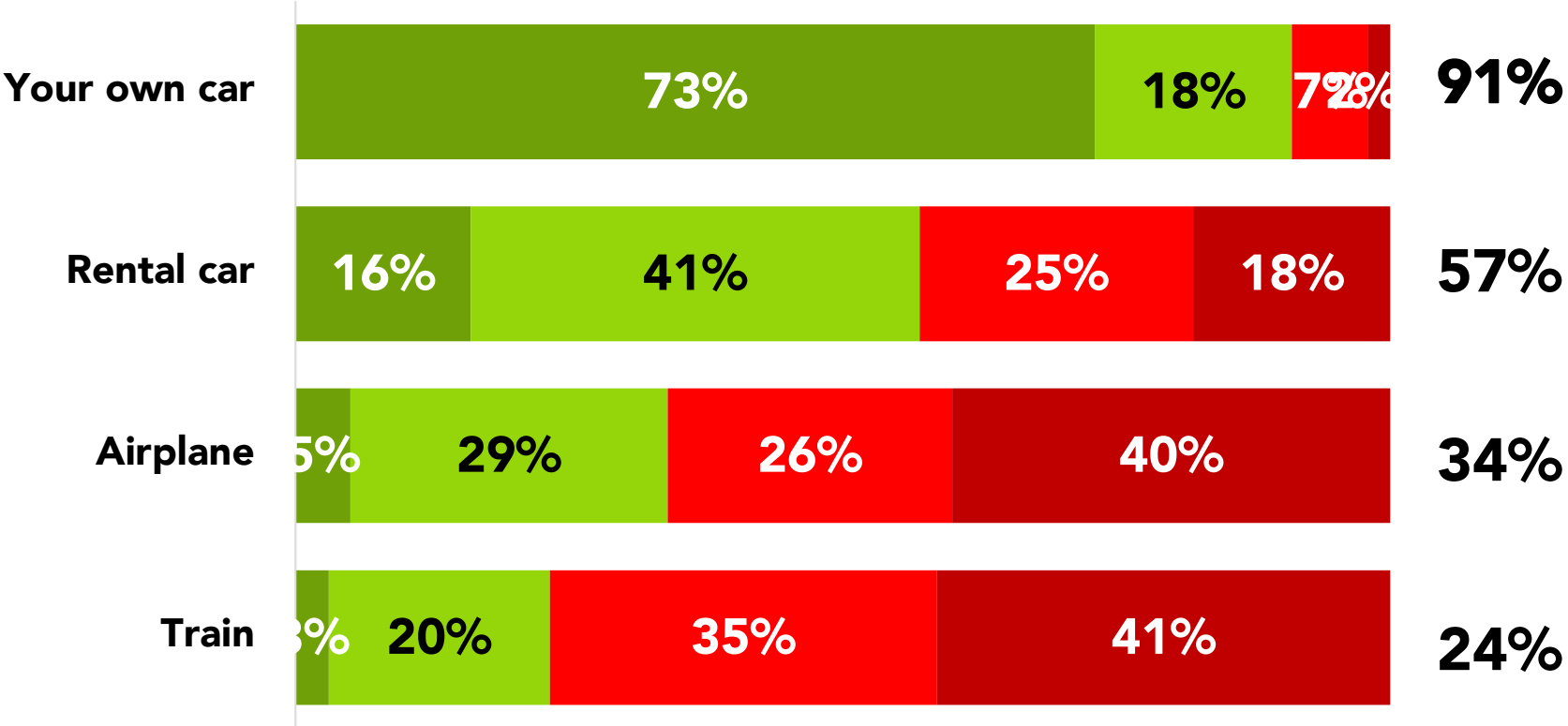
Few Winnipeg travelers say they will be more likely to take a trip to Ontario.

Instead, 43% are much less likely to travel to Ontario this summer. And 24% say they definitely won't be travelling to Ontario this summer.

To Ontario: Thinking about the upcoming summer and fall, compared to your travel habits last year, are you more or less likely to choose the following travel destinations this summer or fall?

ALSO HESITATION TO TRAVEL IN ANYTHING BUT THEIR OWN CAR

%
very/somewhat
comfortable

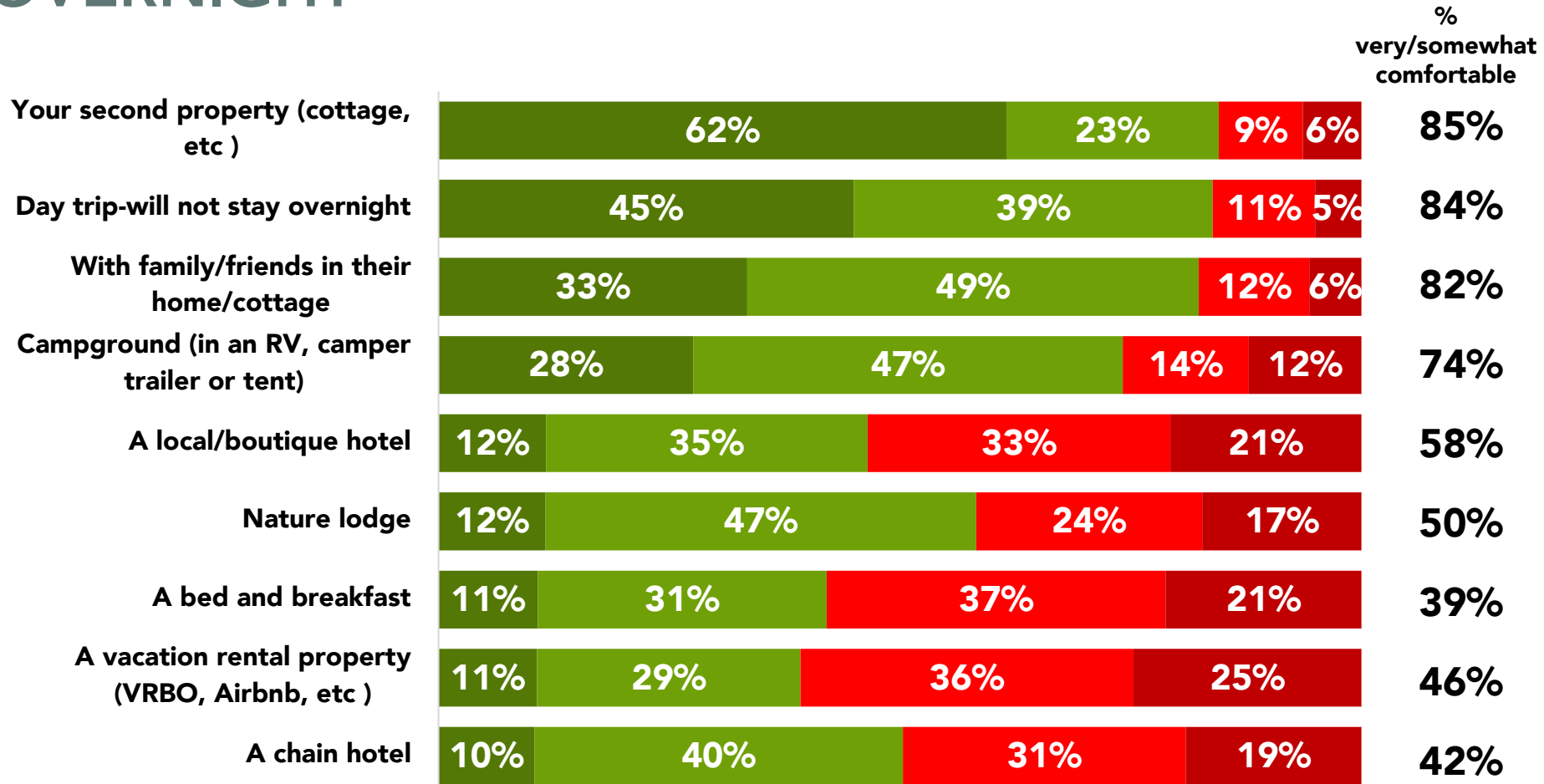


Like Ontarians, those in Winnipeg are also very hesitant to travel in anything but their own vehicles.

■ Very comfortable
 ■ Somewhat comfortable
 ■ Not that comfortable
 ■ Not at all comfortable

During Summer/Fall 2020, how comfortable will you be taking the following to travel to your trip destination *not interested removed

WINNIPEG TRAVELERS PREFER TO STAY WITH FAMILY, NOT OVERNIGHT



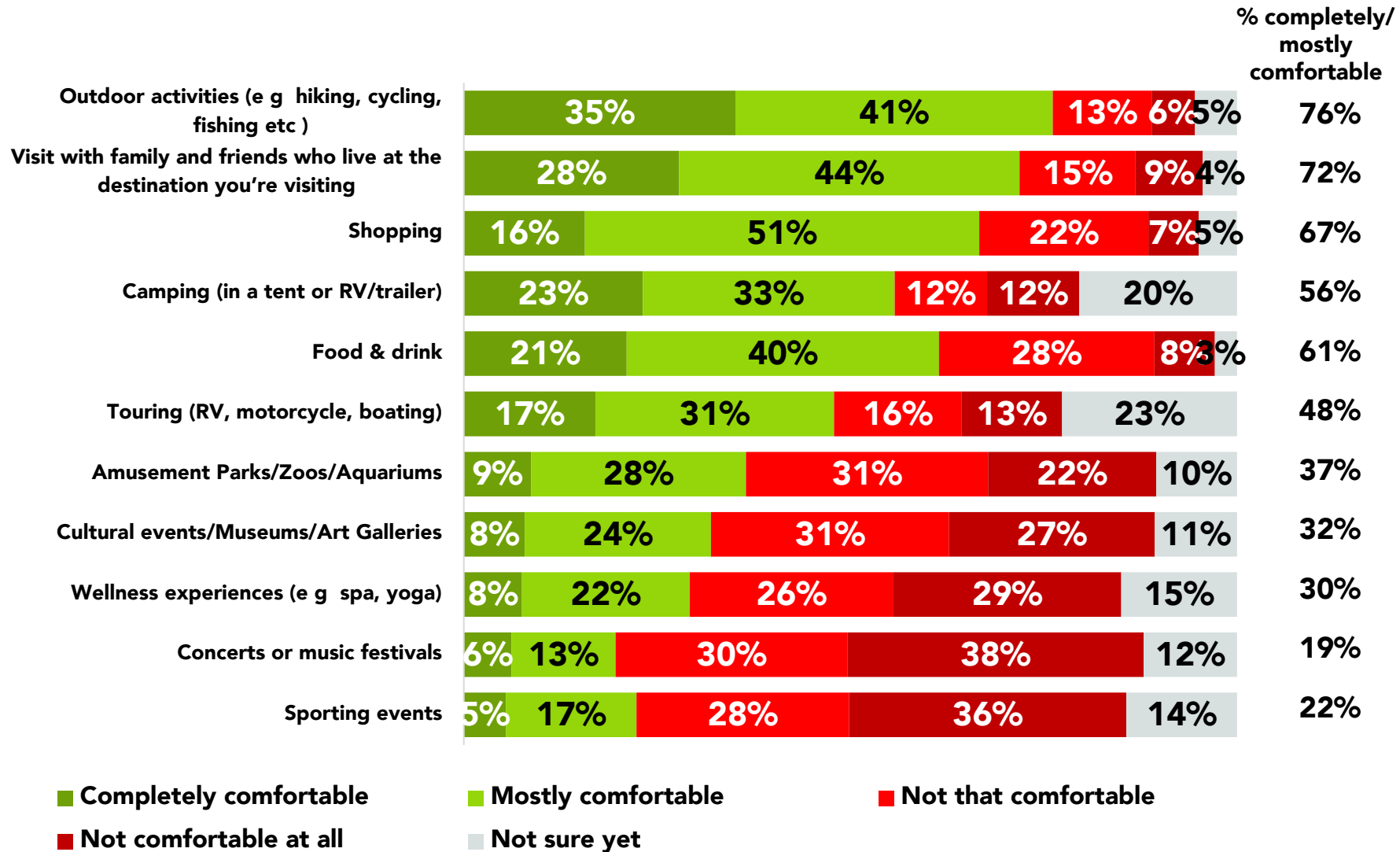
Compared to Ontario travelers, Winnipeg travelers are more likely to be very comfortable with...
 Their second property (62% vs 43%)
 Day trips (45% vs 36%)

■ Very comfortable
 ■ Somewhat comfortable
 ■ Not that comfortable
 ■ Not at all comfortable



During Summer/Fall 2020, how comfortable would you be taking a trip to a ...*not interested removed **SMALL BASE

ACTIVITIES: SMALLER GROUPS, MORE SPACE



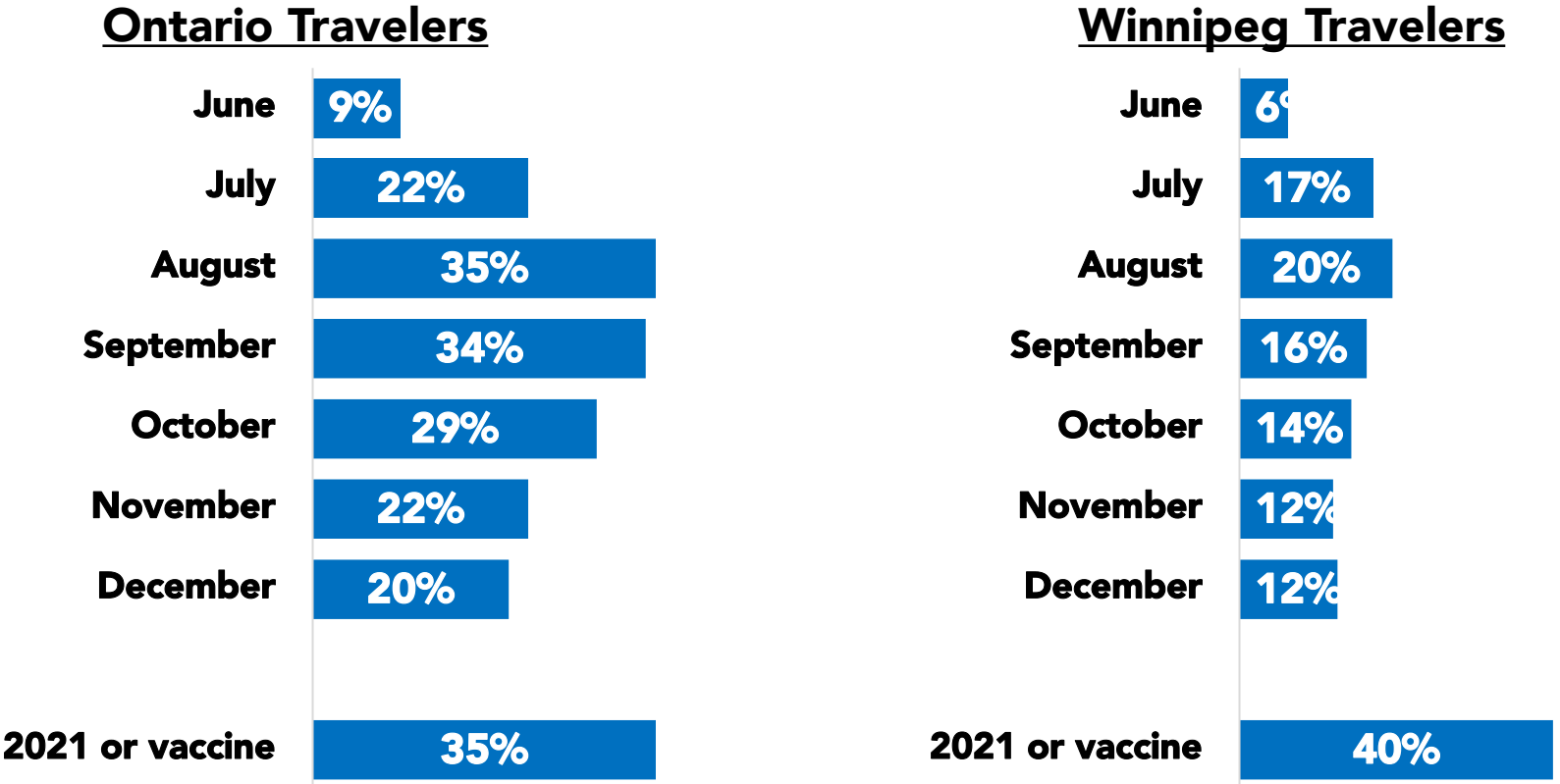
Winnipeg travelers are also most comfortable with outdoor activities/visiting with family/friends.

During Summer/Fall 2020, to what extent will you feel comfortable, if at all, doing the following activities?

CONCERN PROFILES

<i>IMPORTANCE OF THE FOLLOWING AS A RESULT OF COVID-19...</i>	<i>% OF POP FOR WHICH THIS IS A CONCERN</i>
PHYSICAL DISTANCING	53%
BEING CLOSE TO HOME	44%
COVID-19 PROCEDURES AND COMMS	59%
FAMILIARITY	60%
COST	44%

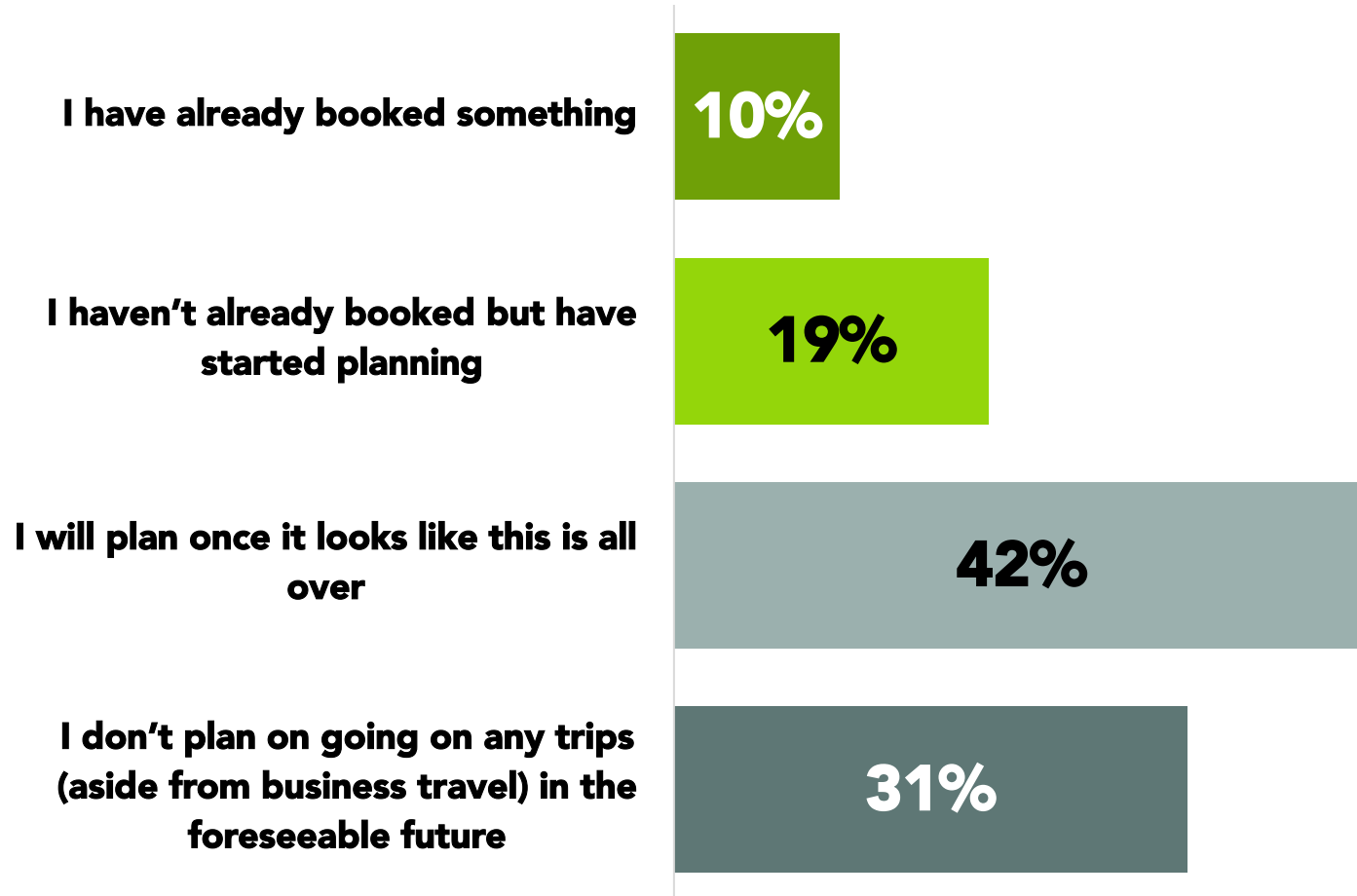
COMFORTABLE TRAVELING NOT TOO SOON, NOT TOO LATE



Winnipeg travelers are much less comfortable travelling to an Ontario destination for all remaining months in 2020.

As of right now, which months of the year do you feel comfortable making travel plans to a destination in Ontario? Select all that apply

ONE IN TEN HAVE ALREADY BOOKED, MOST WAITING IT OUT



As with Ontarians, very few have actually booked travel so far.

Most haven't even started making plans.

Of the 8% who booked (n=35), 32% booked a trip to Ontario.

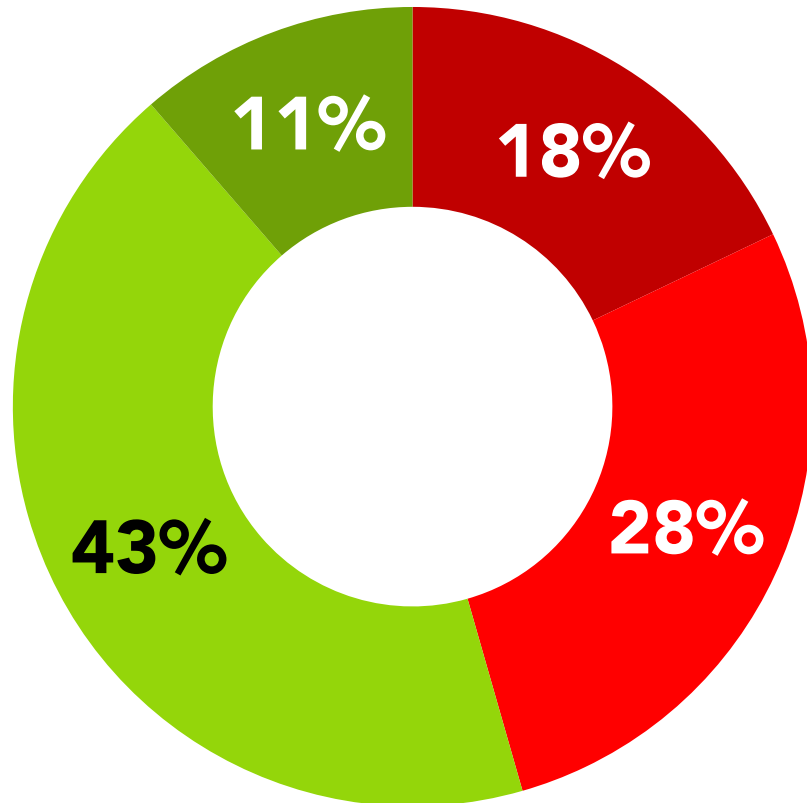
Have you booked future travel plans (aside from business travel) or talked about future travel plans with your family or friends for when the COVID-19 pandemic is over?

A dark, atmospheric photograph of an airport terminal. In the foreground, a black rolling suitcase stands upright on the right side. The background shows a busy airport with people walking, sitting, and standing. There are large structural columns and overhead signs. The overall lighting is dim, creating a moody and somewhat somber atmosphere.

APPENDIX: MONTREAL TRAVELERS

MOST ARE WORRIED ABOUT THE PANDEMIC

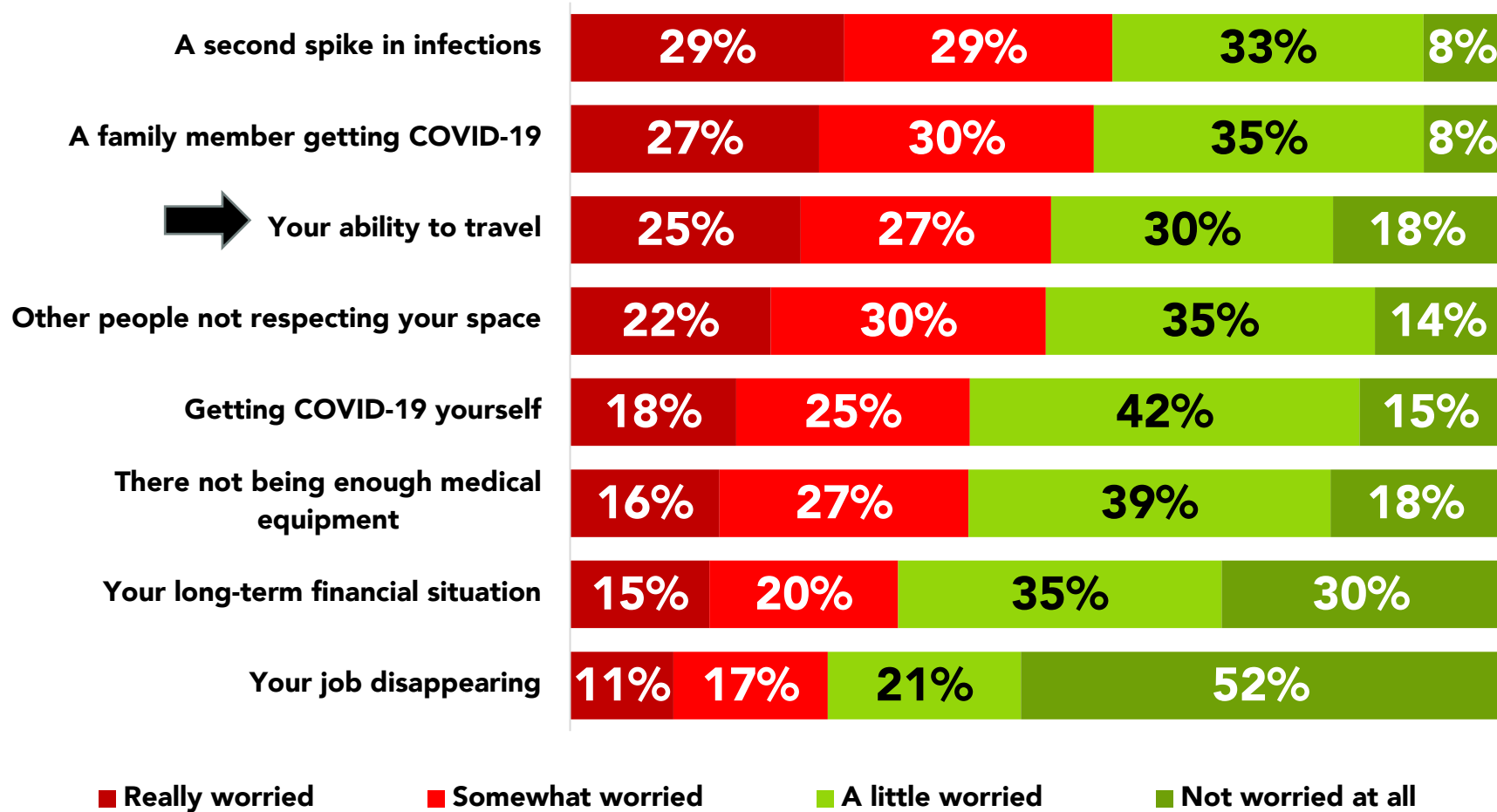
■ Really worried ■ Somewhat worried ■ A little worried ■ Not worried at all



46% of Winnipeg travelers say coronavirus is making them worried. Similar to Ontario travelers.

Overall, how worried, if at all, is the situation with the coronavirus or COVID-19 making you right now?/To what extent, if at all, are you worried about the following when it comes to the COVID-19 pandemic

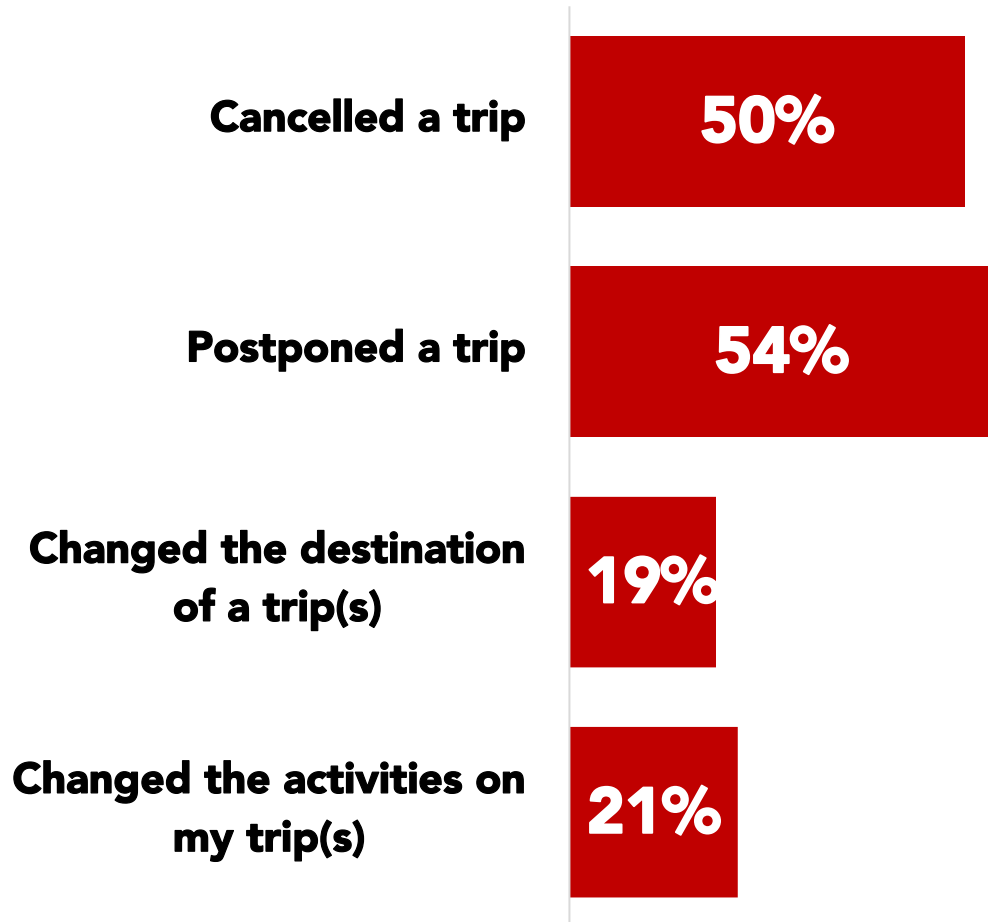
TO WHAT EXTENT ARE YOU WORRIED ABOUT THE FOLLOWING...



Montreal travelers also have similar levels of worry about COVID specifics, including travel.

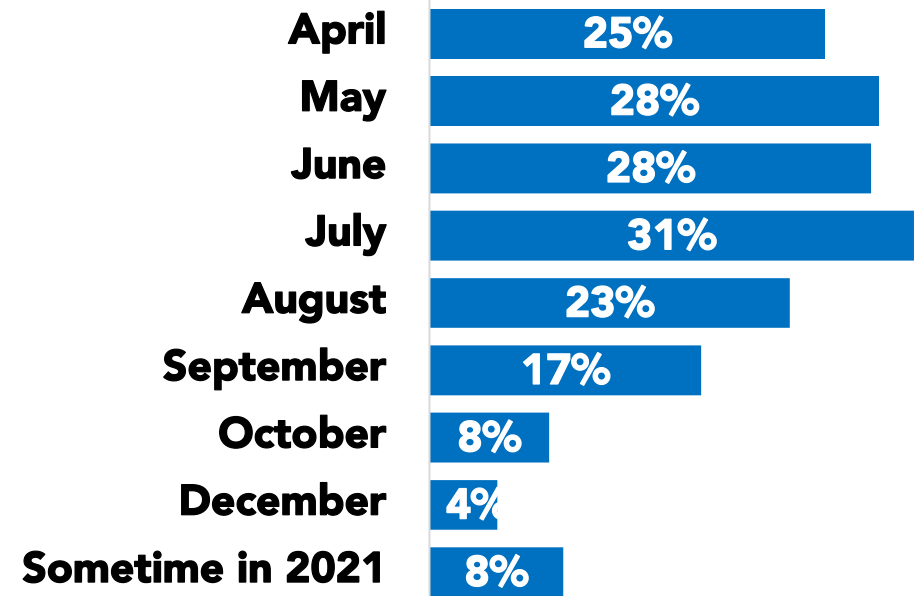
To what extent, if at all, are you worried about the following when it comes to the COVID-19 pandemic

SIGNIFICANT IMPACT TO TRAVEL PLANS



Half have cancelled a trip and half have postponed a trip.

As with those in Ontario and Winnipeg they are most likely cancelling/postponing summer trips.



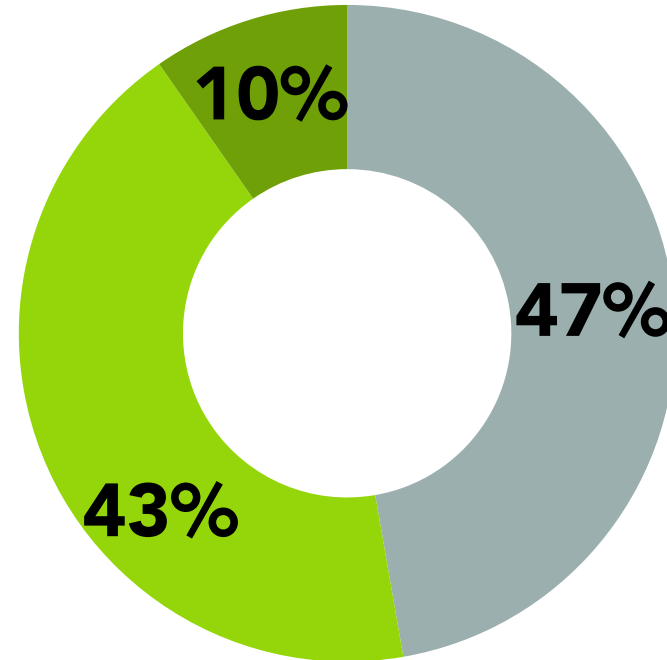
Due to the coronavirus outbreak have you had to do any of the following.../Of the trips that you cancelled/postponed, which month(s) were they scheduled to take place? Please select all that apply

POST-COVID TRAVEL COMFORT

■ I'll test the waters first

■ I'll get back in but carefully

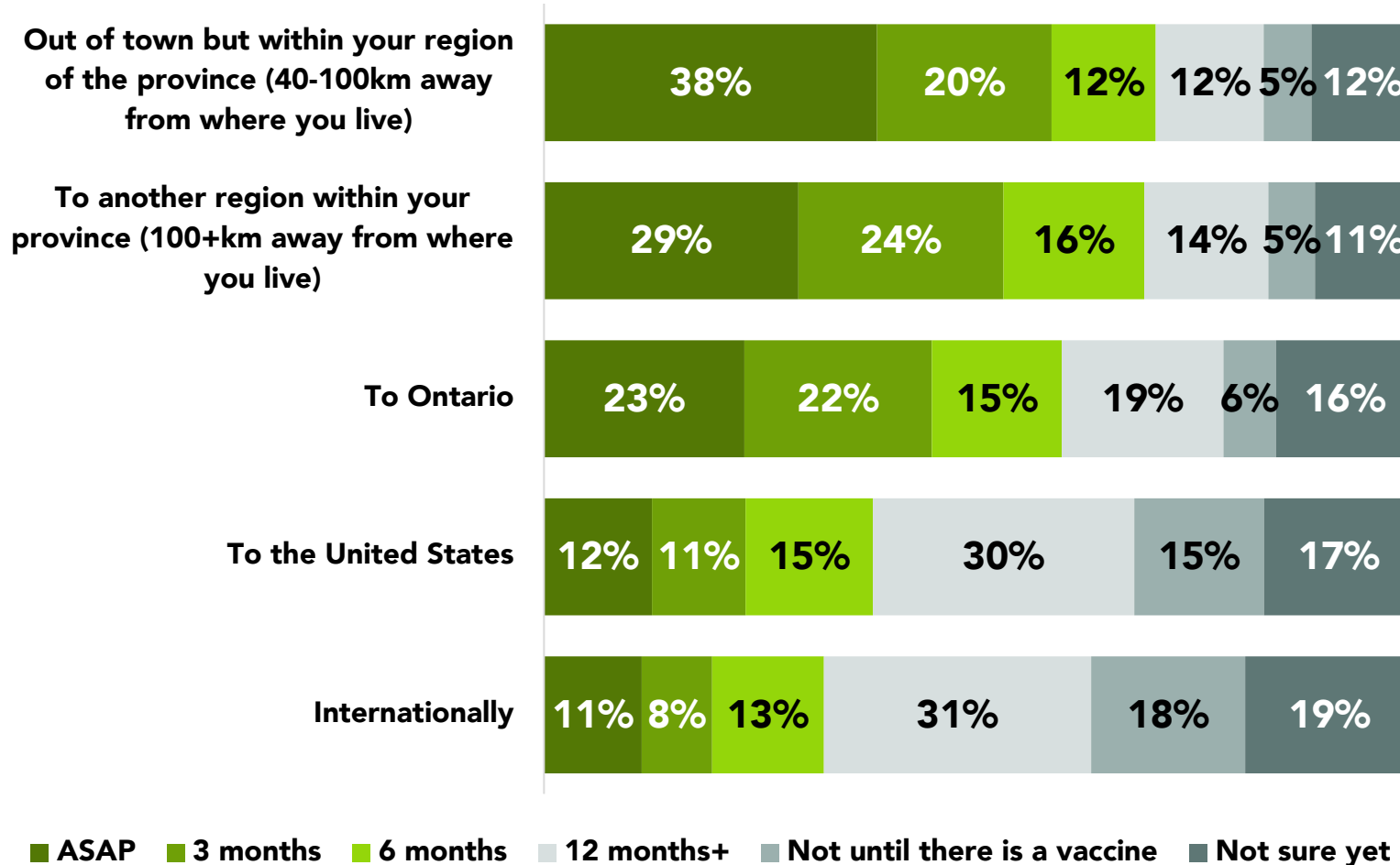
■ I'll jump right back in



One in ten plan on jumping right back in to travel.

What best describes how you feel about travelling now as physical distancing restrictions start to be lifted

TIME HORIZON FOR DIFFERENT DESTINATIONS

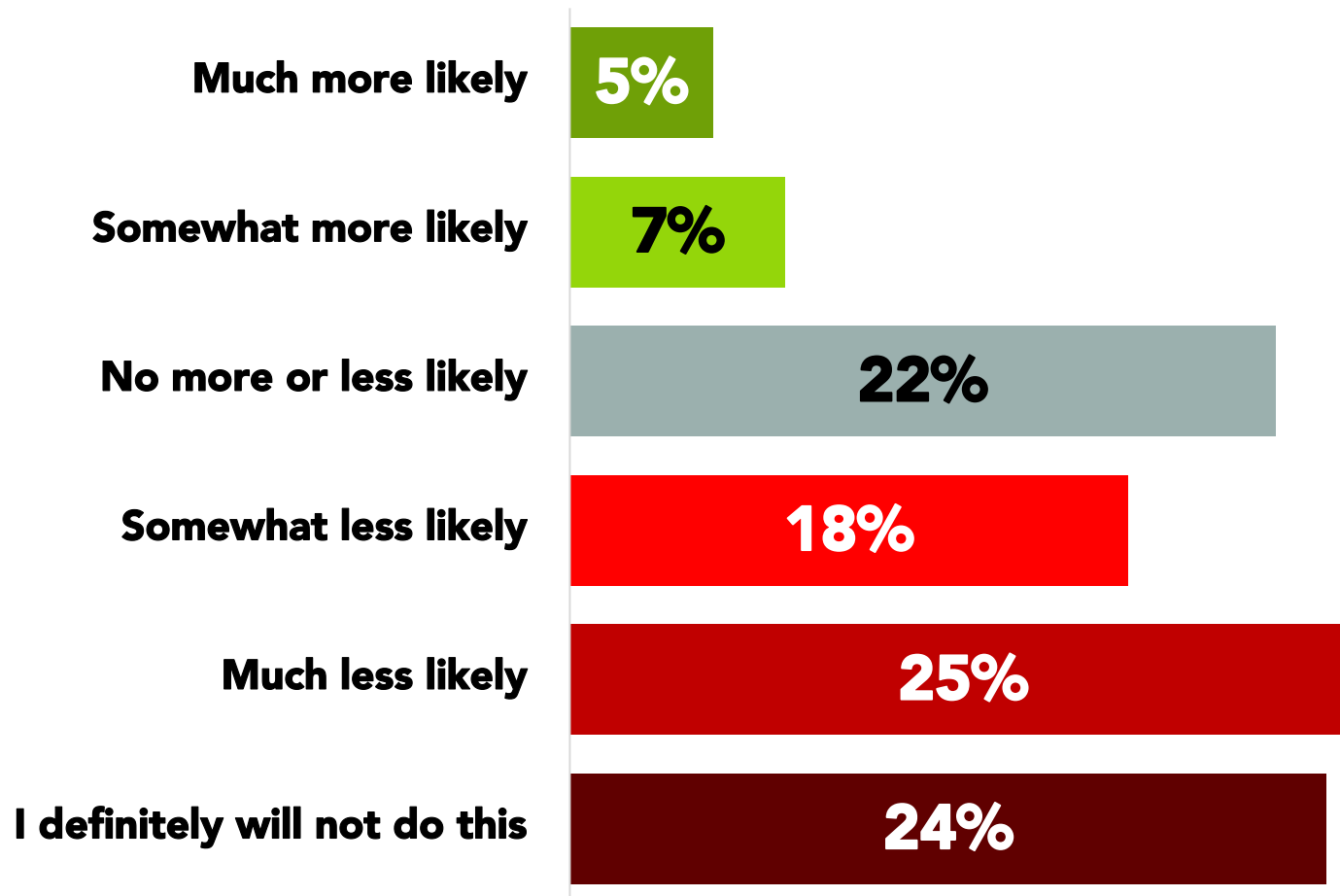


Within the next 3 months, 45% would be comfortable making a trip to Ontario. (compared to 29% of Winnipeg travelers who said the same).

Compared to Ontarians they are just as likely to choose travel within their own province.

Once travel restrictions are lifted, how long will it be before you feel comfortable travelling *not interested removed

TRAVEL TO ONTARIO THIS SUMMER/FALL?



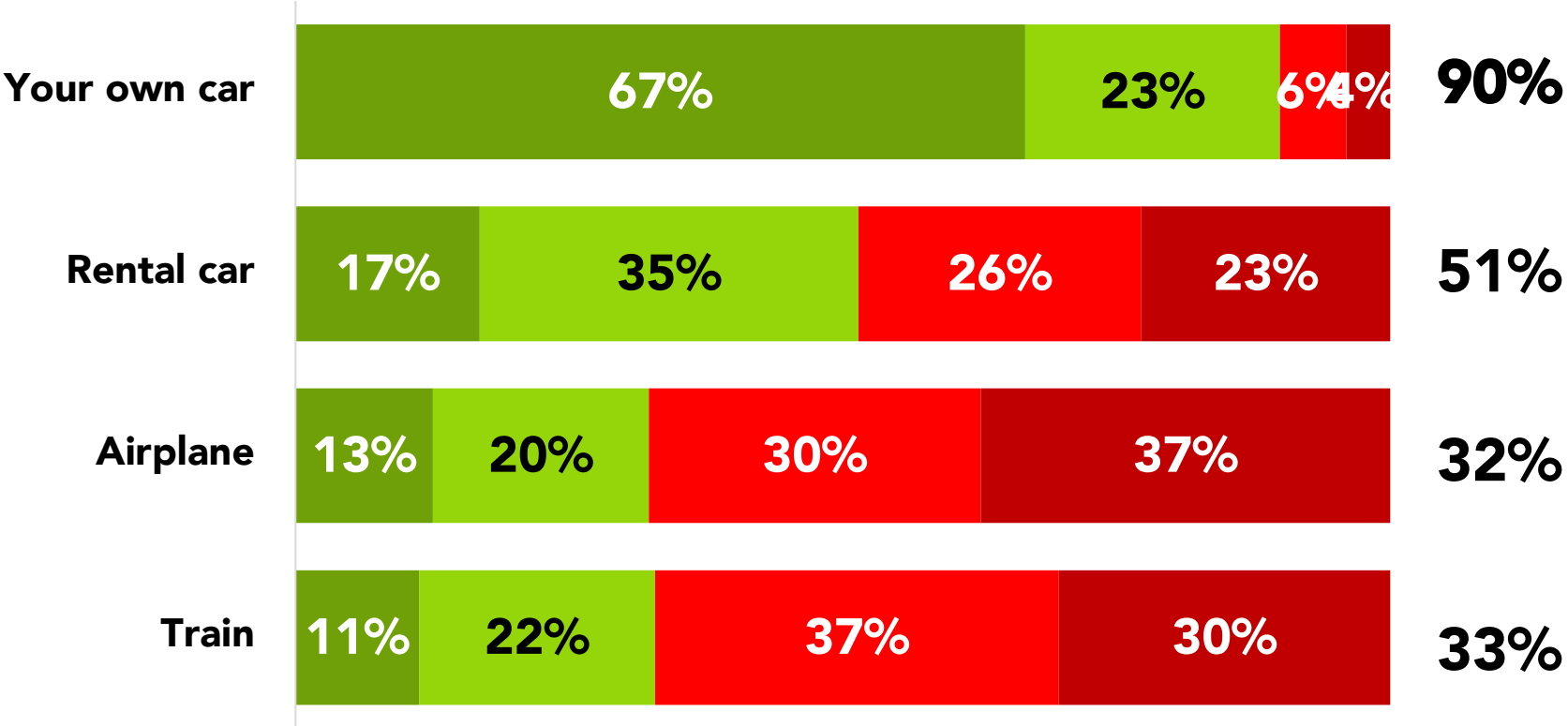
About one in five say they are more likely to be making a trip to Ontario this summer, much more optimistic than Winnipeg travelers.

Only 30% are less likely to travel to an Ontario destination. Ad 20% definitely won't be doing this.

To Ontario: Thinking about the upcoming summer and fall, compared to your travel habits last year, are you more or less likely to choose the following travel destinations this summer or fall?

ALSO HESITATION TO TRAVEL IN ANYTHING BUT THEIR OWN CAR

%
very/somewhat
comfortable

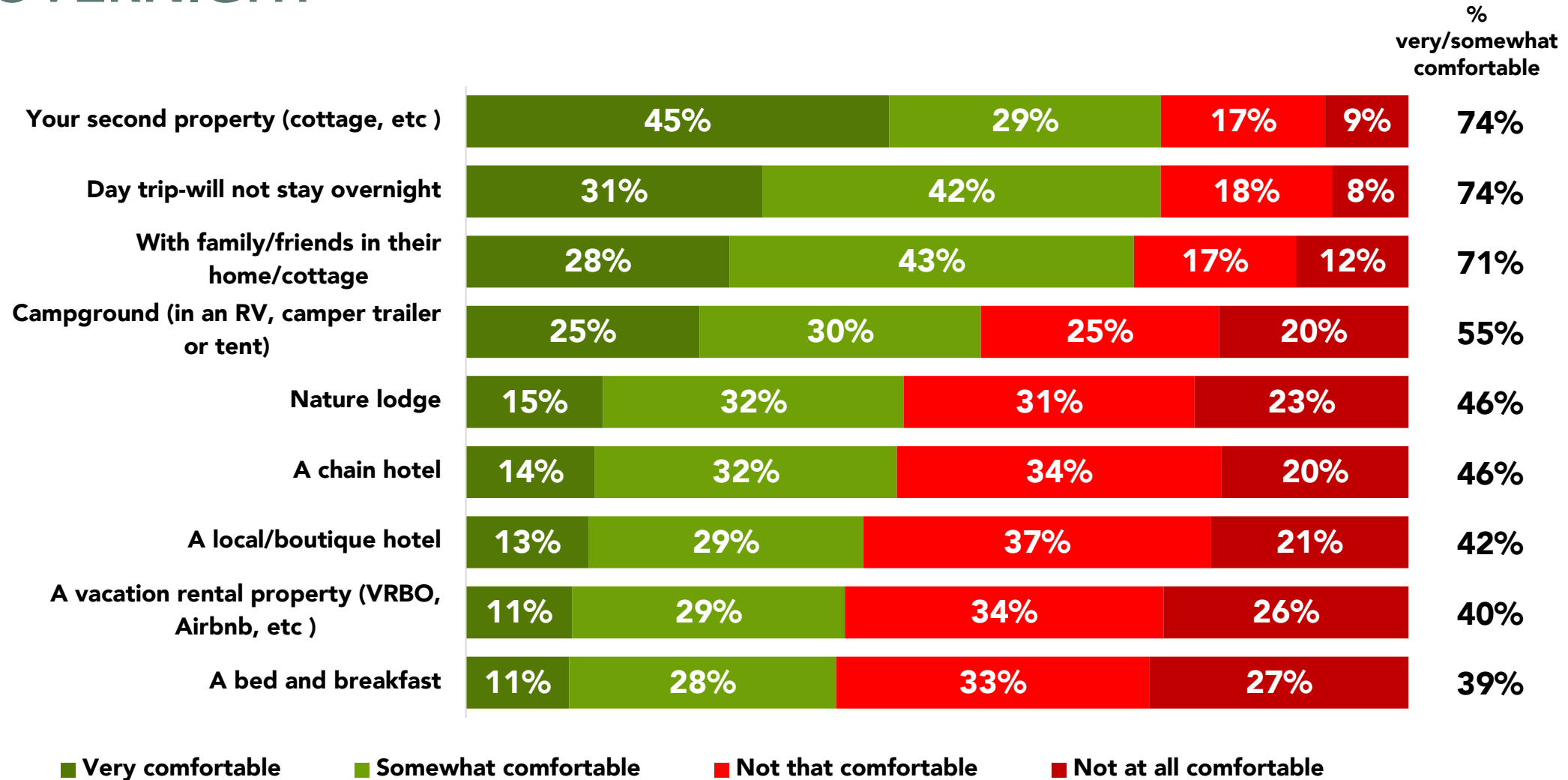


Like Ontarians, those in Montreal are also very hesitant to travel in anything but their own vehicles.

■ Very comfortable
 ■ Somewhat comfortable
 ■ Not that comfortable
 ■ Not at all comfortable

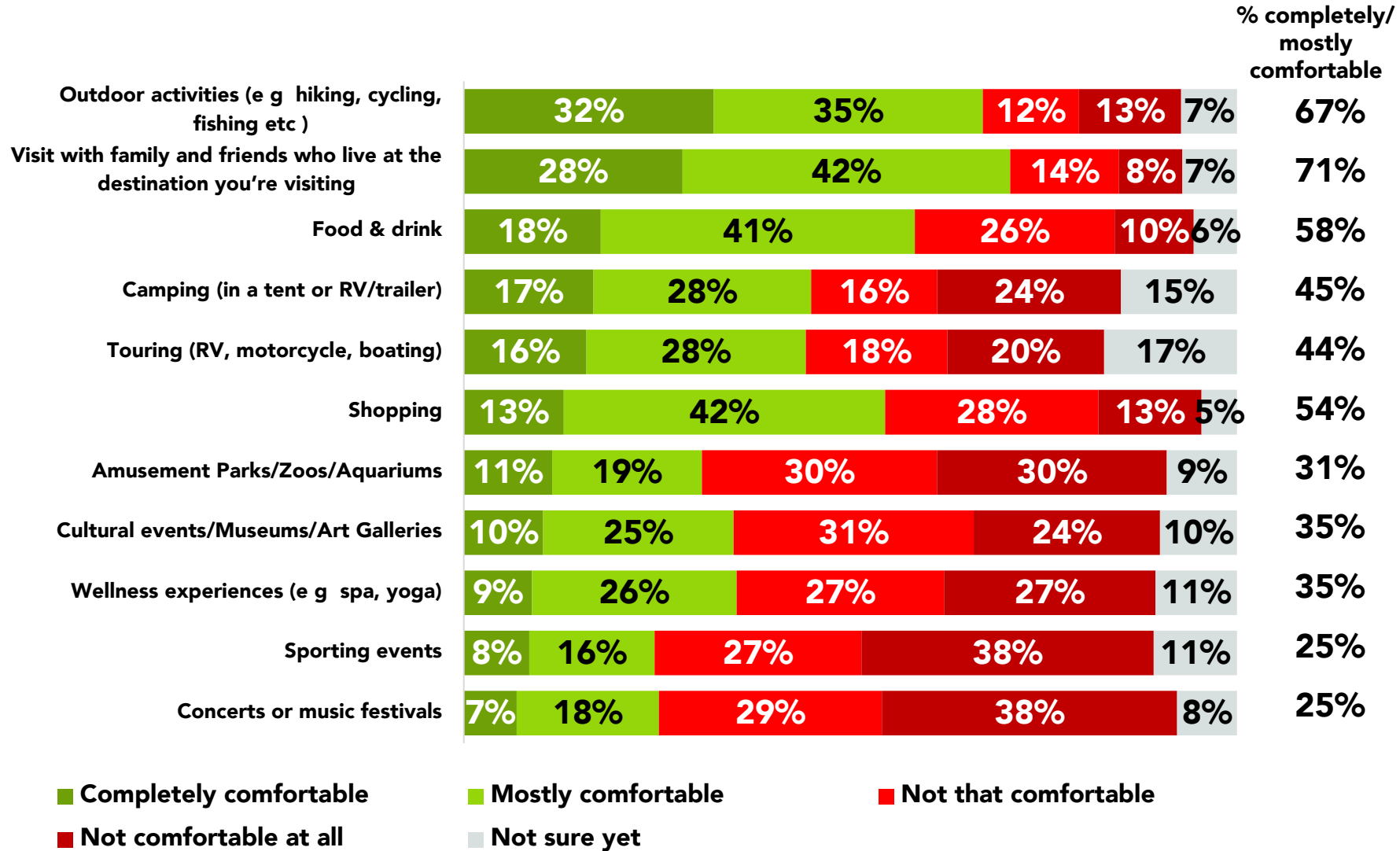
During Summer/Fall 2020, how comfortable will you be taking the following to travel to your trip destination *not interested removed

MONTREAL TRAVELERS PREFER TO STAY WITH FAMILY, NOT OVERNIGHT



During Summer/Fall 2020, how comfortable would you be taking a trip to a ...*not interested removed **SMALL BASE

ACTIVITIES: SMALLER GROUPS, MORE SPACE



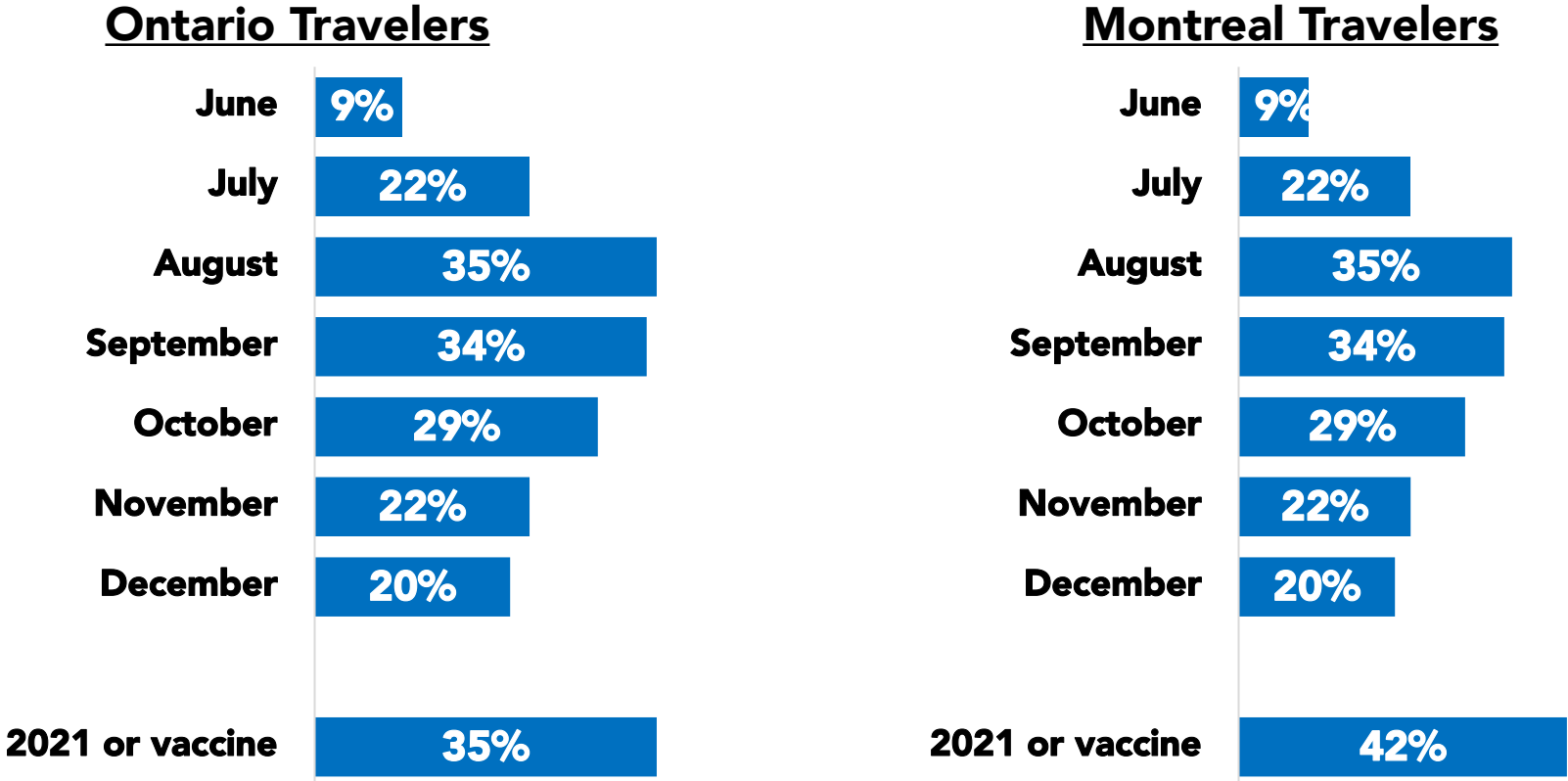
Montreal travelers are also most comfortable with outdoor activities/visiting with family/friends.

During Summer/Fall 2020, to what extent will you feel comfortable, if at all, doing the following activities?

CONCERN PROFILES

<i>IMPORTANCE OF THE FOLLOWING AS A RESULT OF COVID-19...</i>	<i>% OF POP FOR WHICH THIS IS A CONCERN</i>
PHYSICAL DISTANCING	46%
BEING CLOSE TO HOME	39%
COVID-19 PROCEDURES AND COMMS	55%
FAMILIARITY	51%
COST	47%

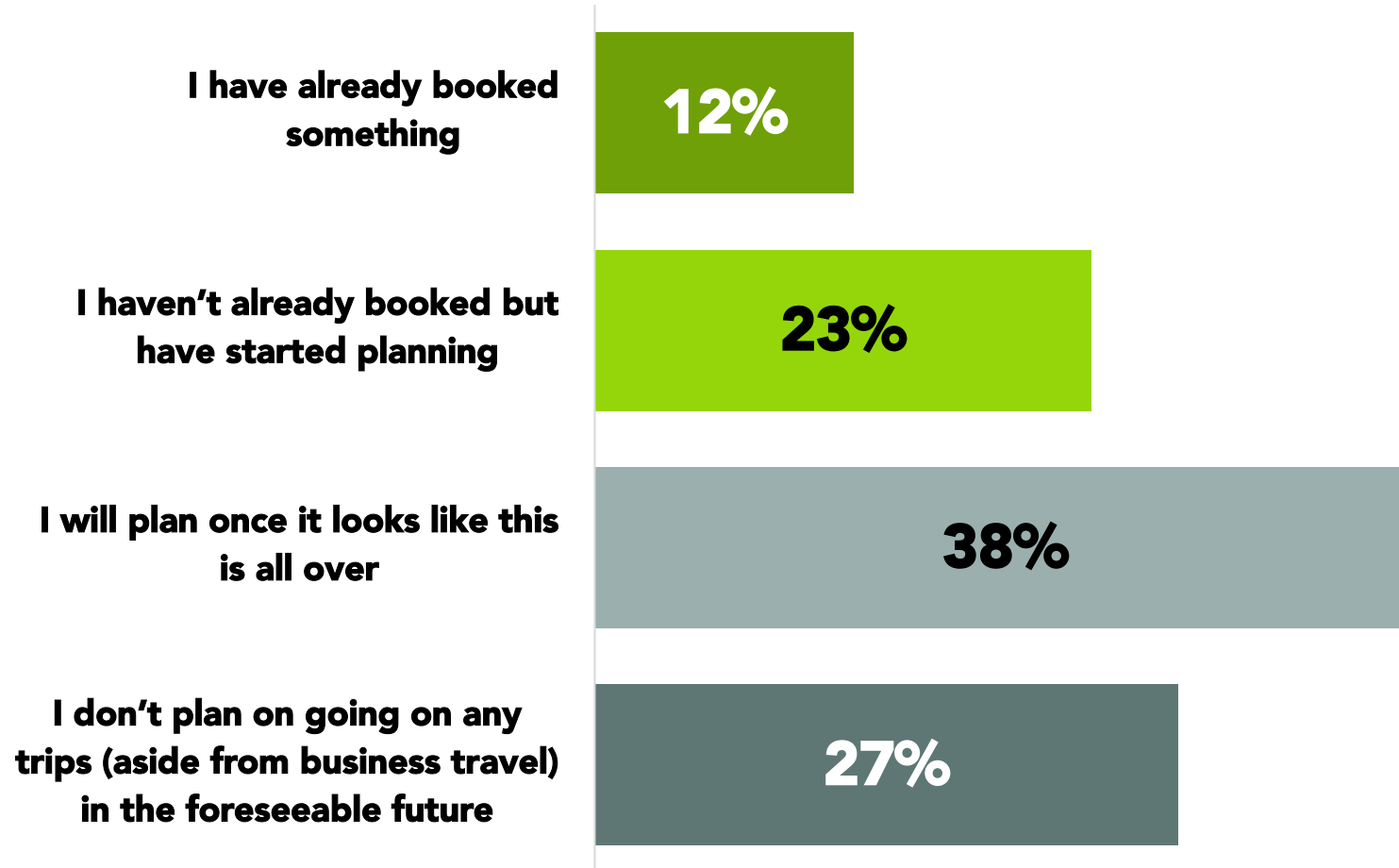
COMFORTABLE TRAVELING NOT TOO SOON, NOT TOO LATE



Montreal travelers are just as comfortable travelling to an Ontario destination for all remaining months in 2020.

As of right now, which months of the year do you feel comfortable making travel plans to a destination in Ontario? Select all that apply

ONE IN TEN HAVE ALREADY BOOKED, MOST WAITING IT OUT



As with Ontarians, very few have actually booked travel so far.

Most haven't even started making plans.

Of the 12% who booked (n=69), 42% booked a trip to Ontario.

Have you booked future travel plans (aside from business travel) or talked about future travel plans with your family or friends for when the COVID-19 pandemic is over?