

**HESITATIONS FOR
SUMMER/FALL 2020
TRAVEL**

**COVID SPECIFIC
EXPECTATIONS
FRONT & CENTRE**

**WHAT IS THE
STORY?**



**COVID-19 & TRAVEL IMPACT
STUDY
INDIVIDUAL RTO REPORT:
RTO 13
FINAL RESULTS
SURVEY OF ONTARIO 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.

In this report:

The margin of error for the visitors sample for a comparable probability-based random sample of the same size is +/- 5.8%, 19 times out of 20.

The margin of error for the residents sample for a comparable probability-based random sample of the same size is +/- 7.6%, 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, and region. Totals may not add up to 100 due to rounding.

PROFILES

	SAMPLE SIZE	THOSE WHO...
VISITORS TO YOUR REGION....	n=400	Winnipeg Residents
RESIDENTS OF YOUR REGION...	n=167	Region 7, 8, 11, 12 & 13a FSAs

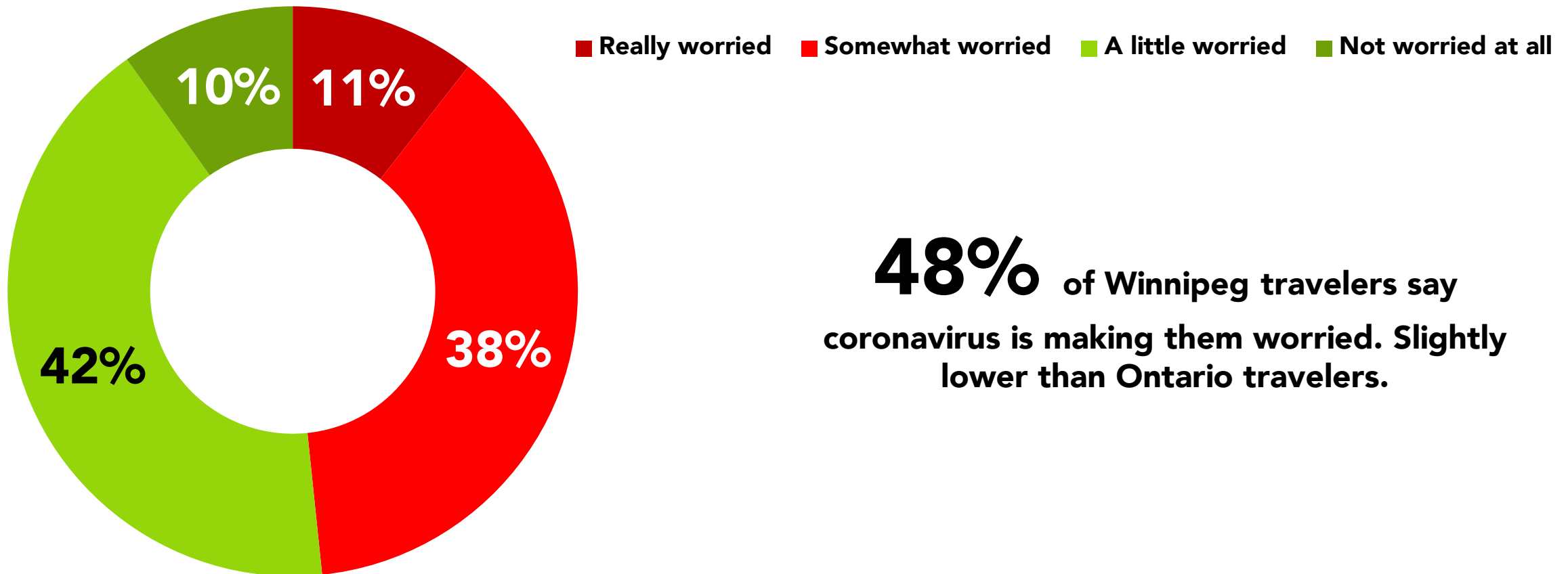
KEY FINDINGS FOR RTO: 13

1. Like all Ontario residents, those likely to travel to your region are still worried about coronavirus and are hesitant to get back into travelling right away.
2. Travellers will be most comfortable with the outdoor activities your region has to offer.
3. COVID-19 procedures and protocol will be key, especially for activities that are indoor, and will require physical distancing guidelines.
4. 67% of residents in your region would consider a trip in the region sometime this summer. 55% would consider a trip to a destination in another region. And few are interested in travelling any further.
5. 57% are open to visitors from other communities nearby, and just over a third would welcome visitors from other parts of the province.

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

PART 1: VISITORS TO YOUR REGION

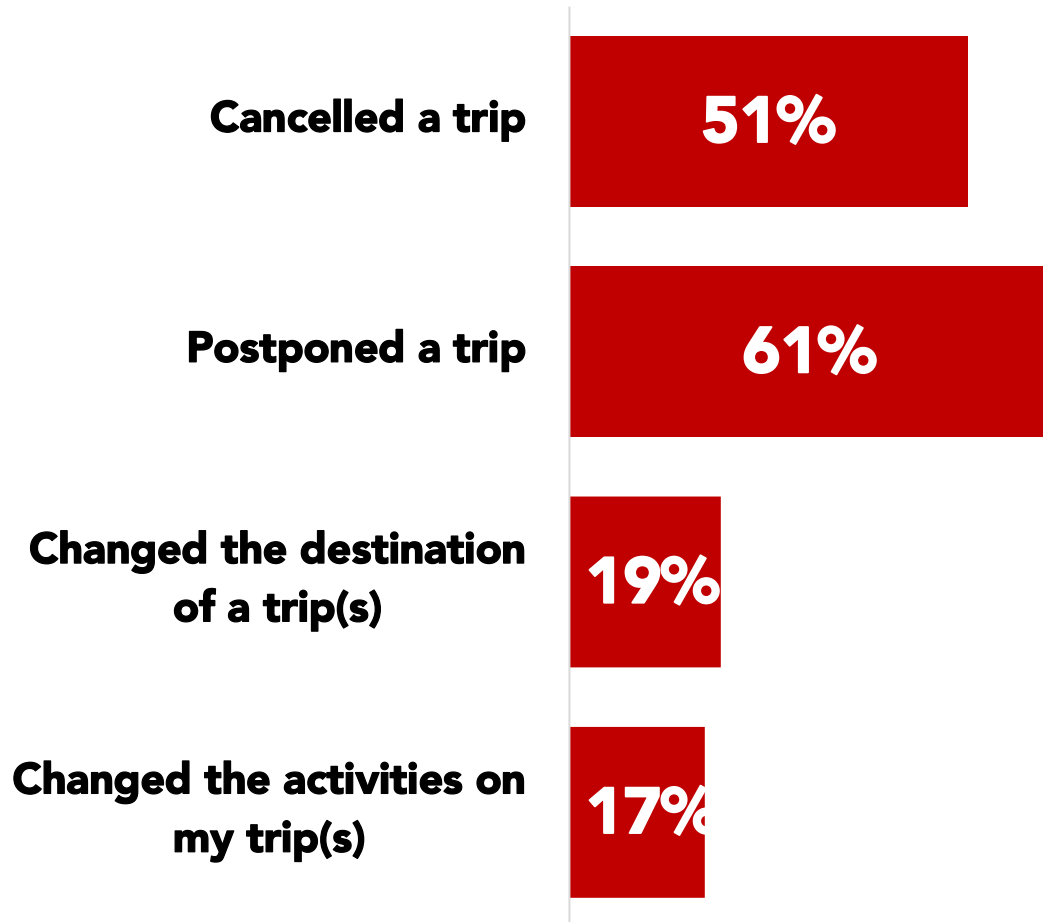
MOST ARE WORRIED ABOUT THE PANDEMIC



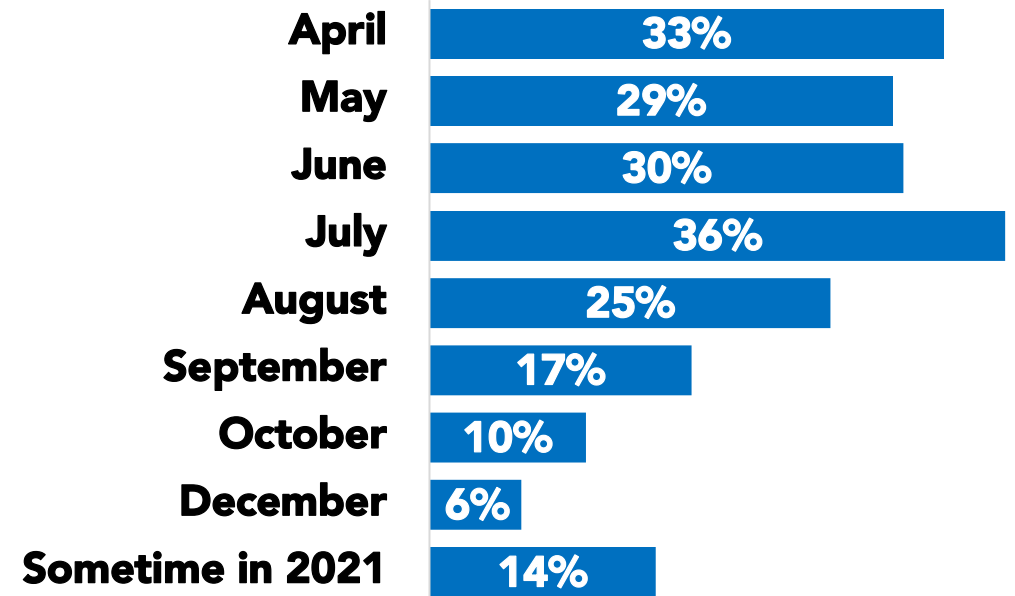
48% of Winnipeg travelers say coronavirus is making them worried. Slightly lower than Ontario travelers.

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

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.



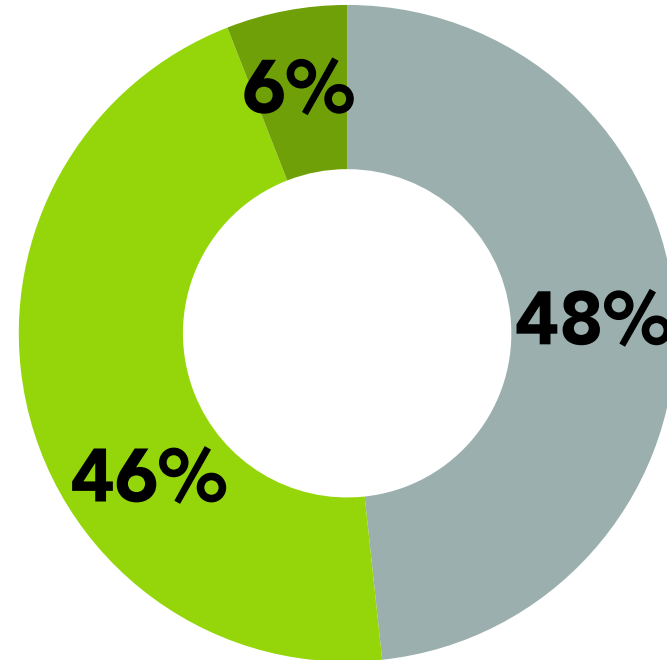
Due to the coronavirus outbreak have you had to do any of the following.../Of the trips that you cancelled/postponed, which month(s) were they scheduled to take place? Please select all that apply

POST-COVID TRAVEL COMFORT

■ I'll test the waters first

■ I'll get back in but carefully

■ I'll jump right back in



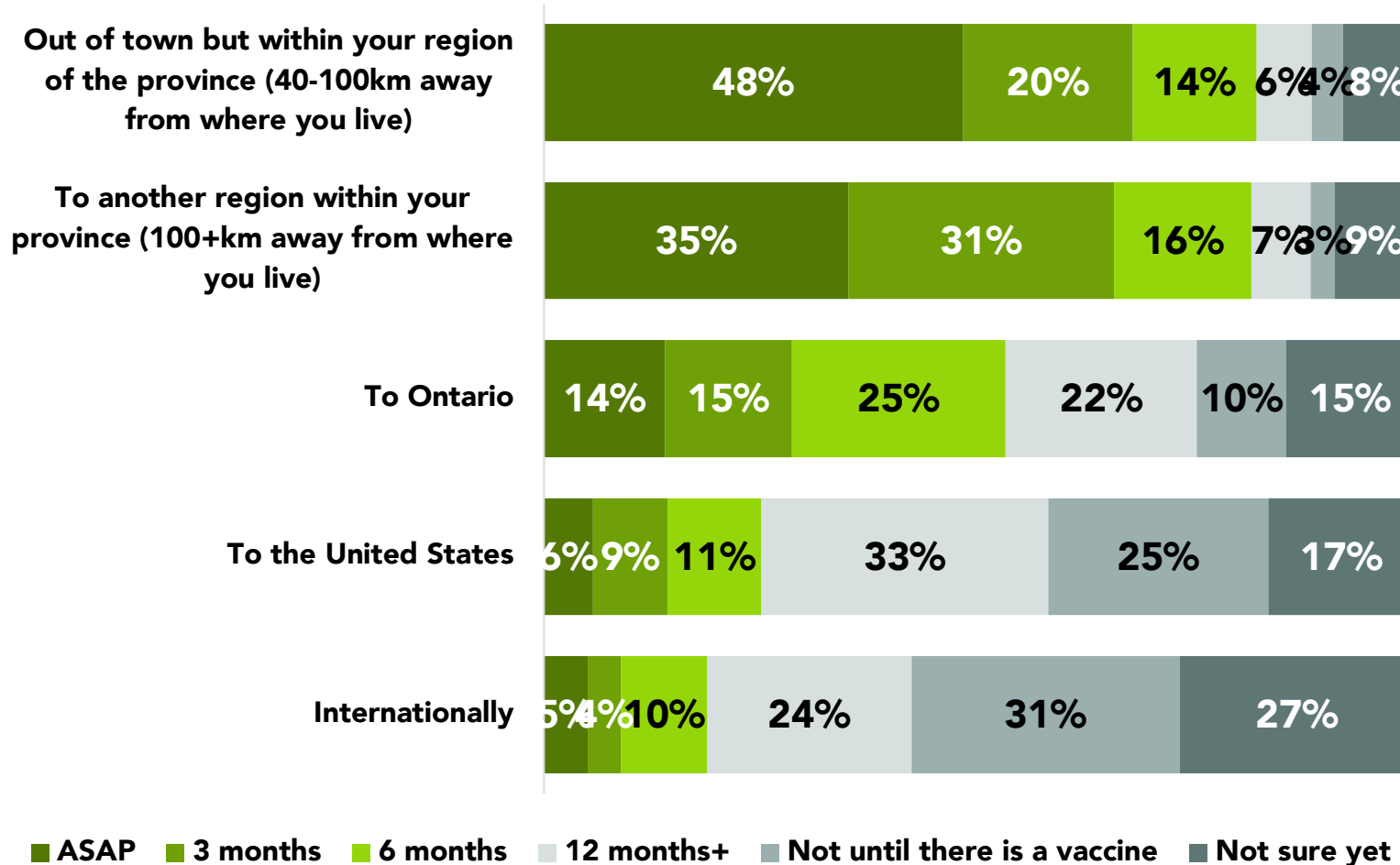
Few Winnipeg travelers are eager to get back into their travel habits.

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.

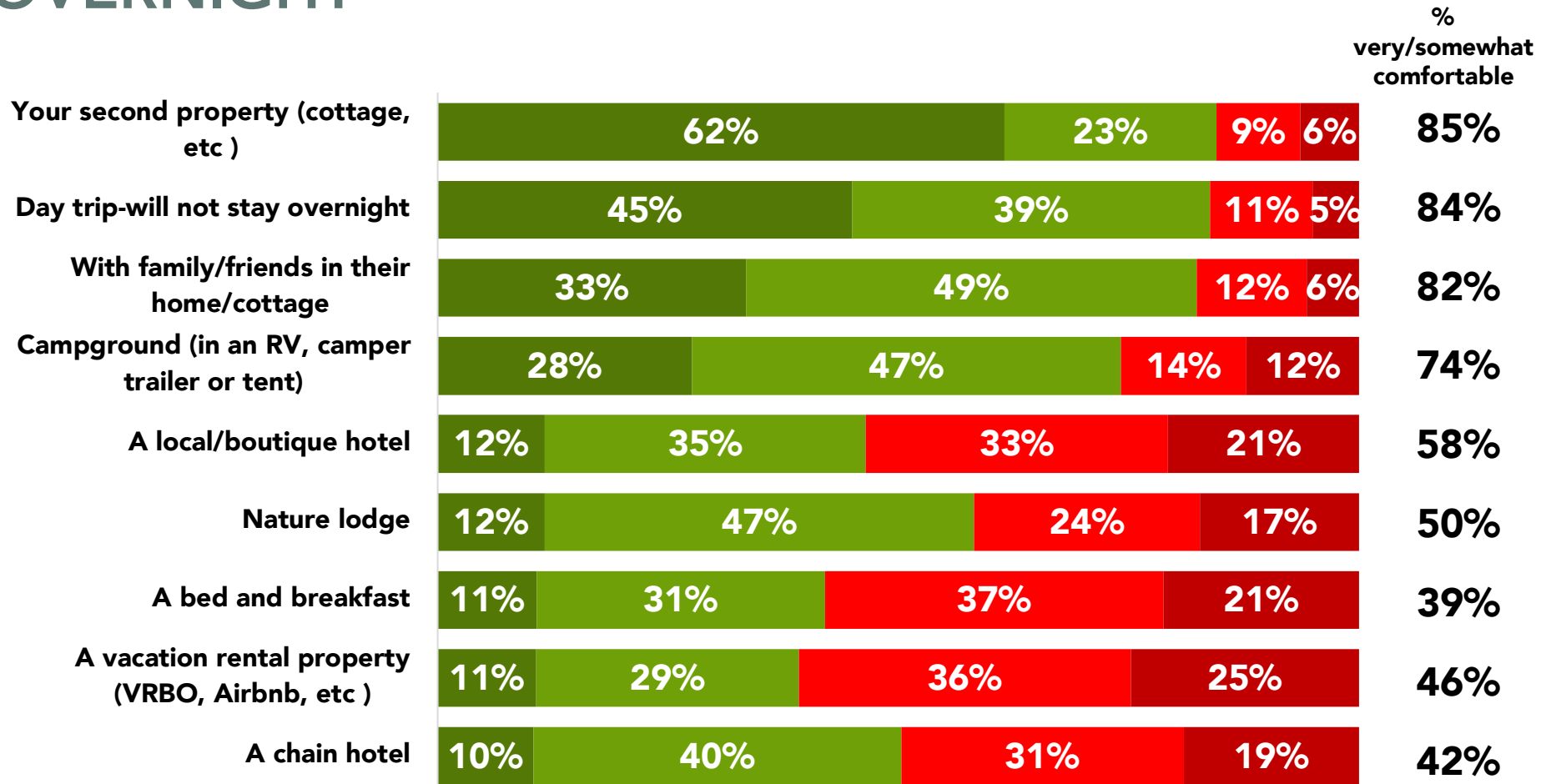
Compared to Ontarians they are much more likely to be traveling within their province ASAP.

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

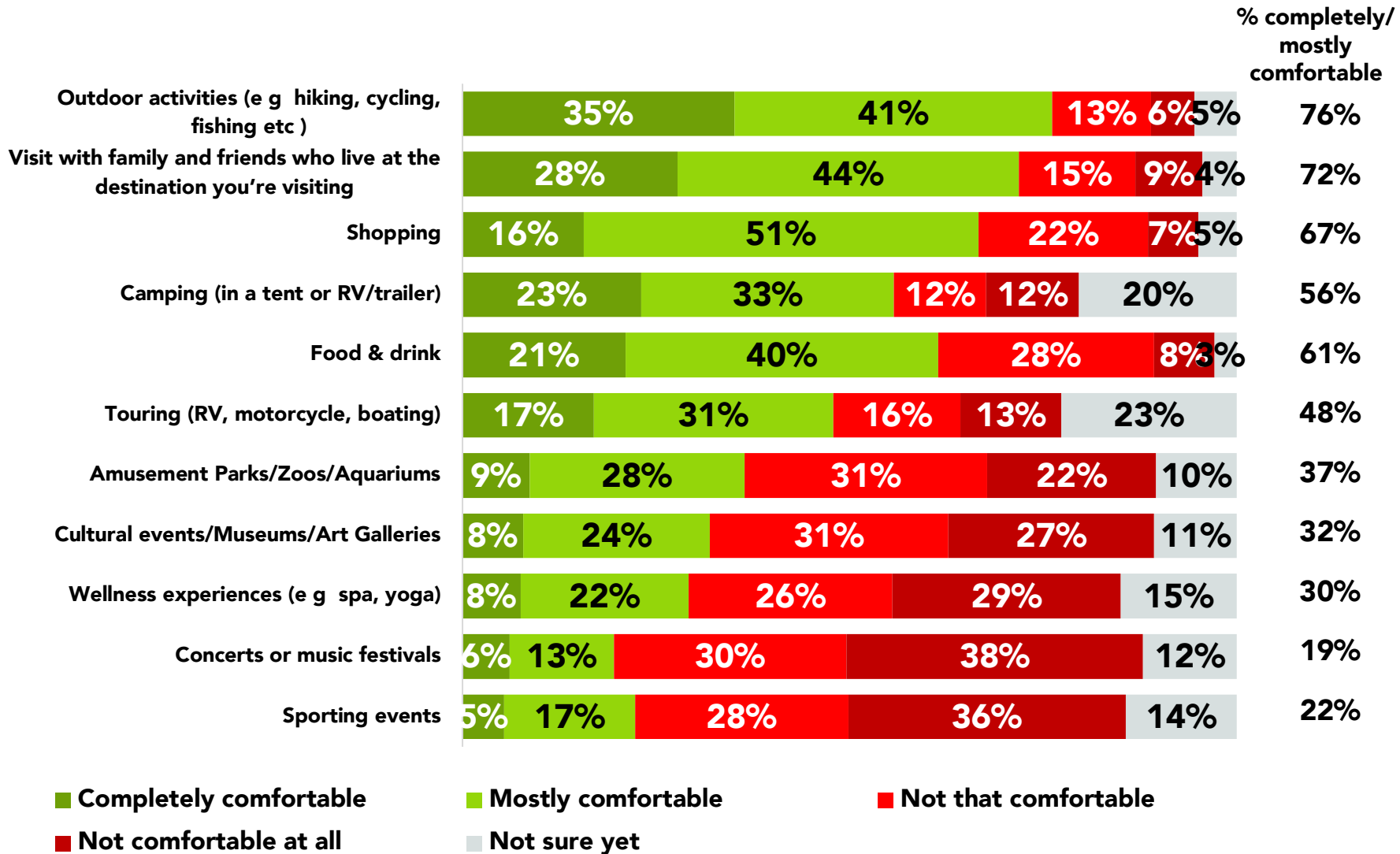
WINNIPEG TRAVELERS PREFER TO STAY WITH FAMILY, NOT OVERNIGHT



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

ACTIVITIES: SMALLER GROUPS, MORE SPACE



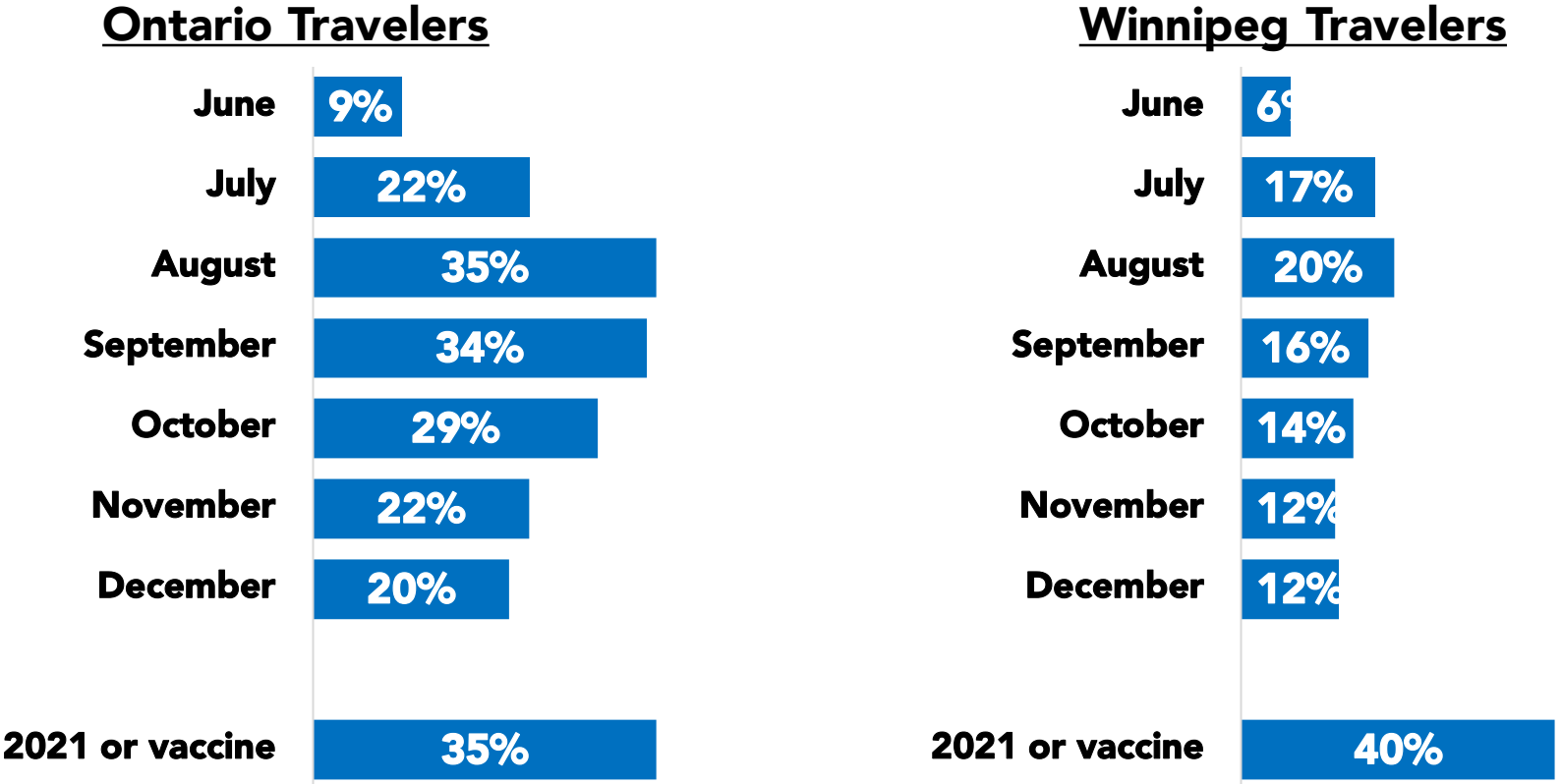
Winnipeg travelers are also most comfortable with outdoor activities/visiting with family/friends.

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%

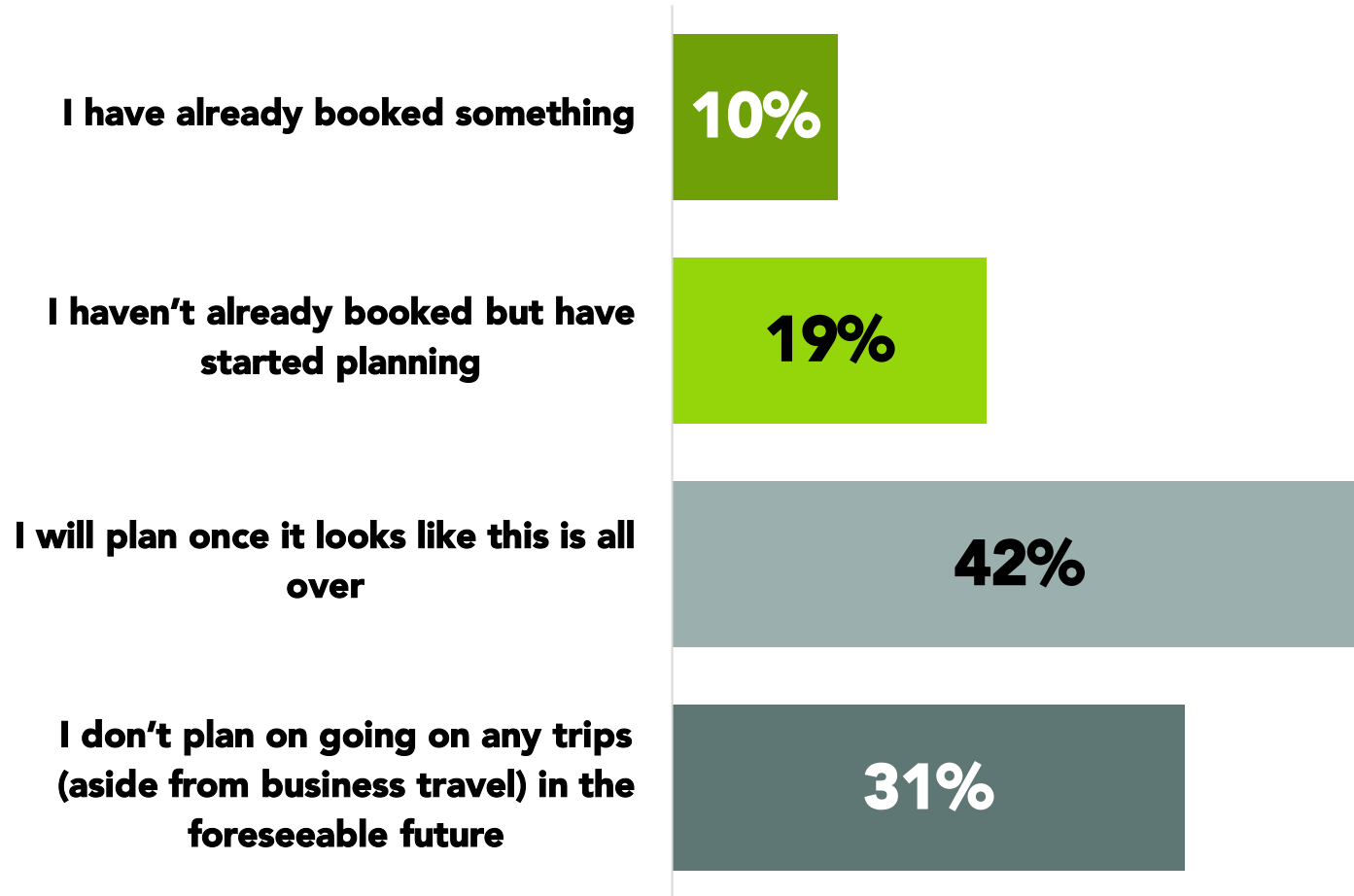
COMFORTABLE TRAVELING NOT TOO SOON, NOT TOO LATE



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



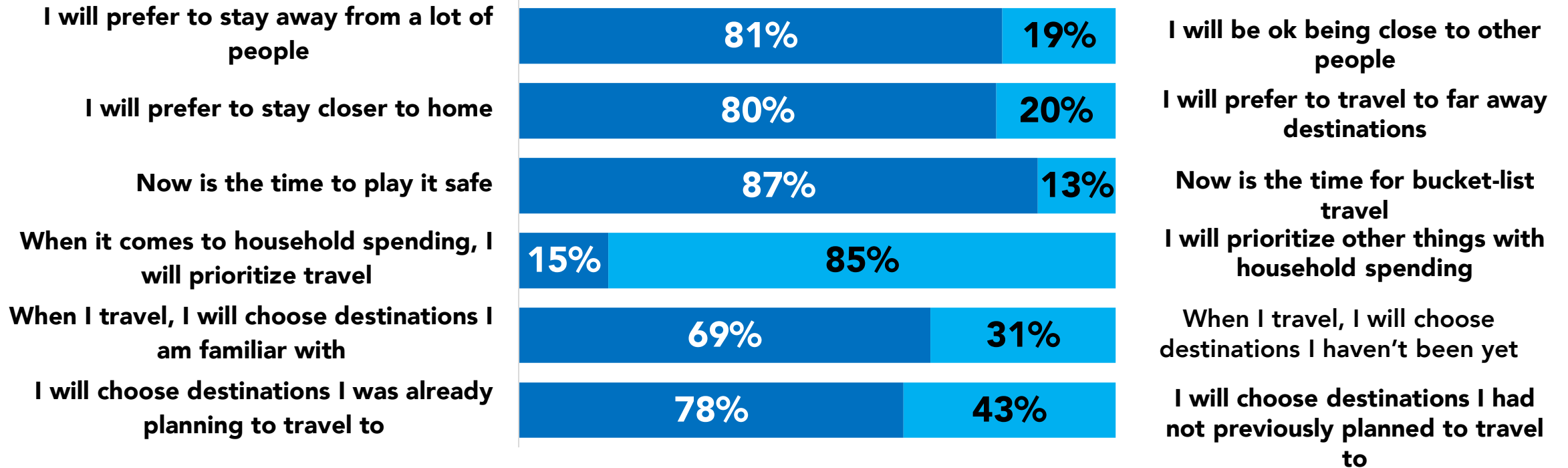
As with Ontarians, very few have actually booked travel so far.

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?

TRAVEL DECISIONS BASED ON...



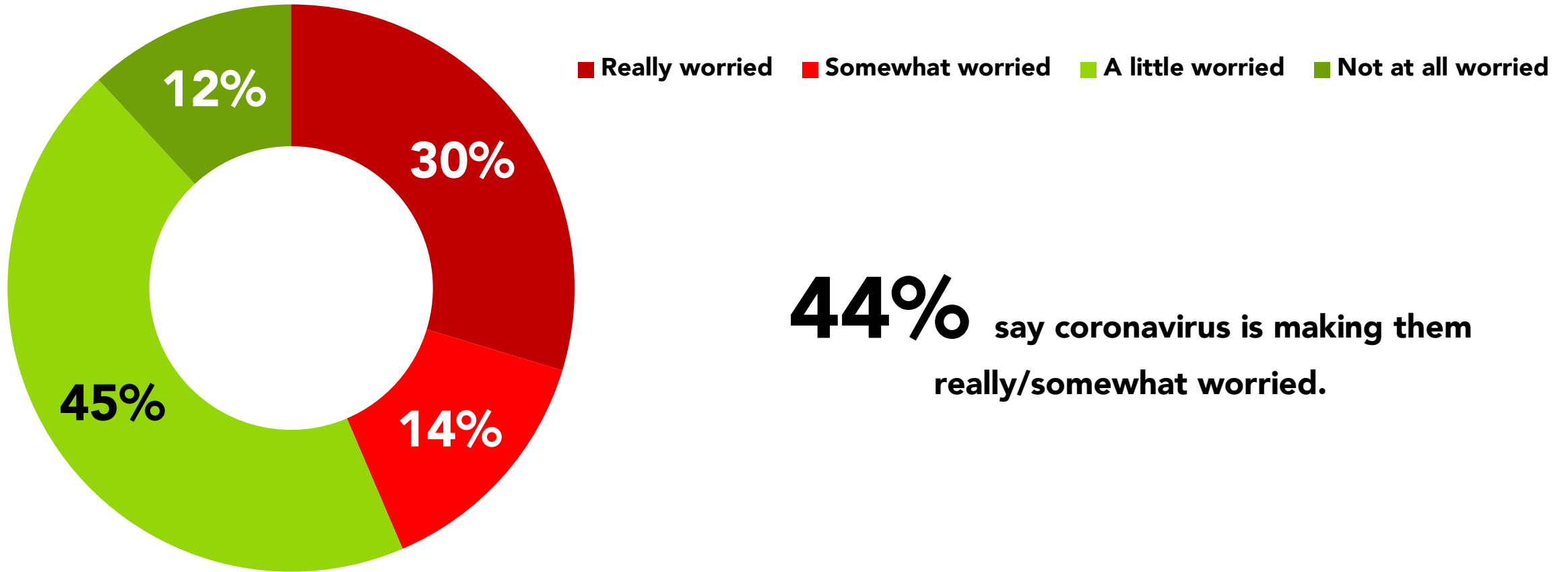
Again, proximity to home and small groups are key.
Right now, familiarity is also important (69% will travel to destinations they were already planning on).
Travel is also not a big financial priority.

87% say right now is the time to play it safe.

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 information screens. The lighting is dim, creating a moody and somewhat somber atmosphere. The overall scene suggests a place of transit and movement.

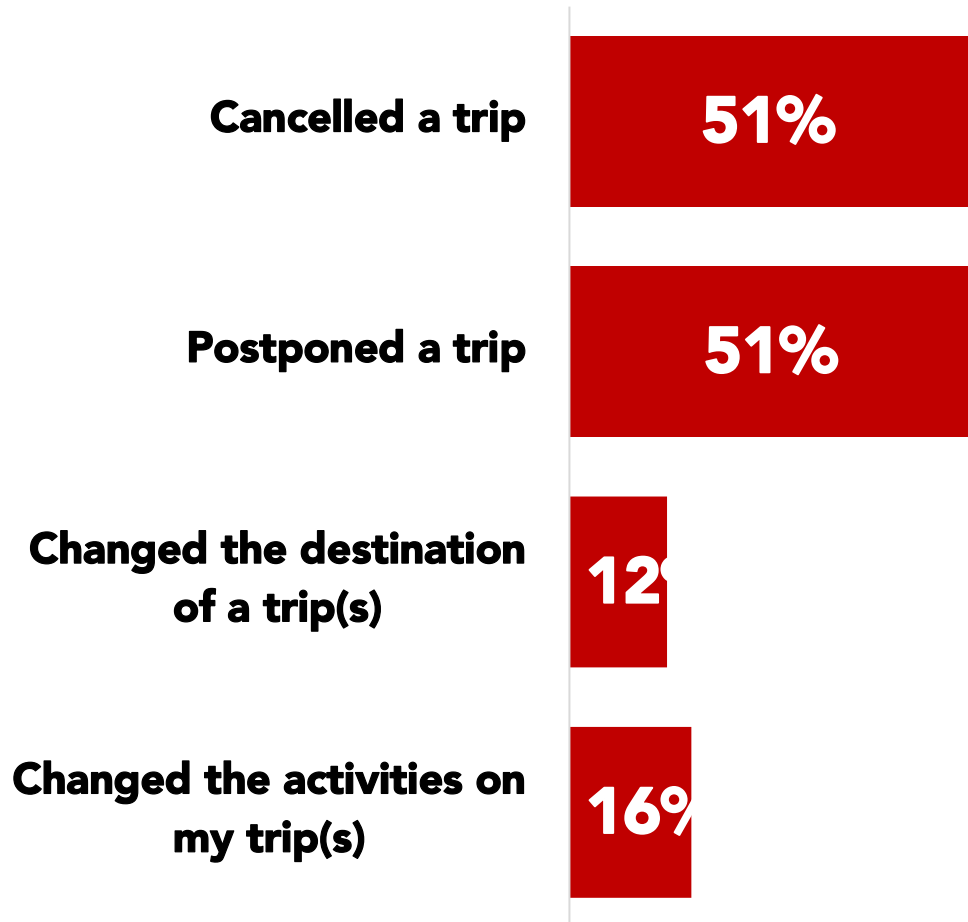
PART 2: RESIDENTS OF YOUR REGION

WORRY ABOUT THE PANDEMIC

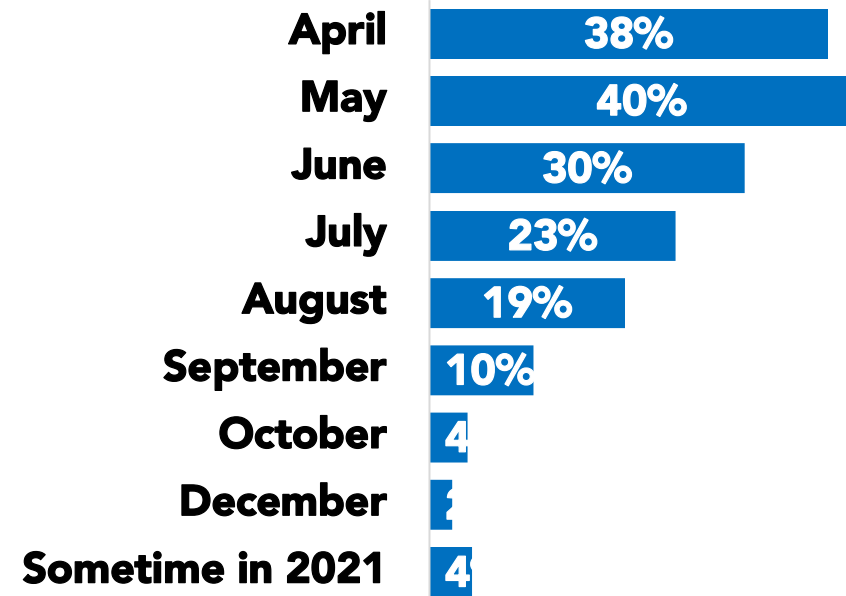


Overall, how worried, if at all, is the situation with the coronavirus or COVID-19 making you right now?/To what extent, if at all, are you worried about the following when it comes to the COVID-19 pandemic?

IMPACT ON TRAVEL PLANS



Over half have cancelled or have postponed at least one trip.



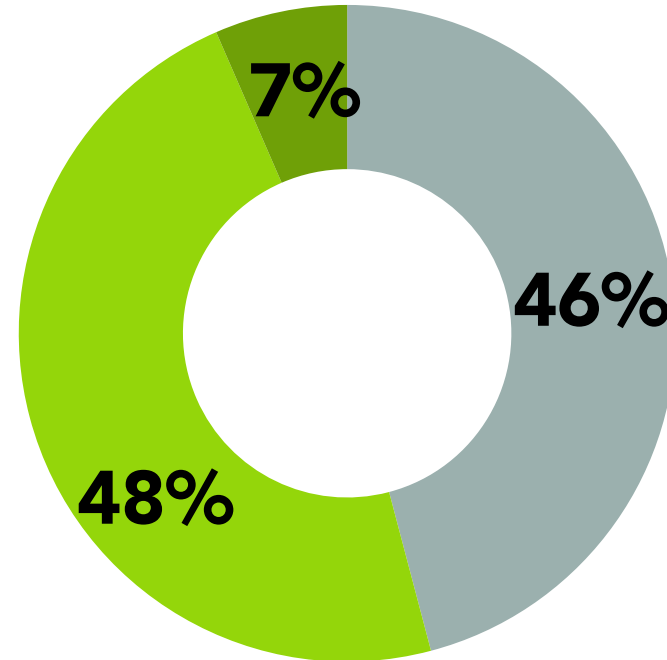
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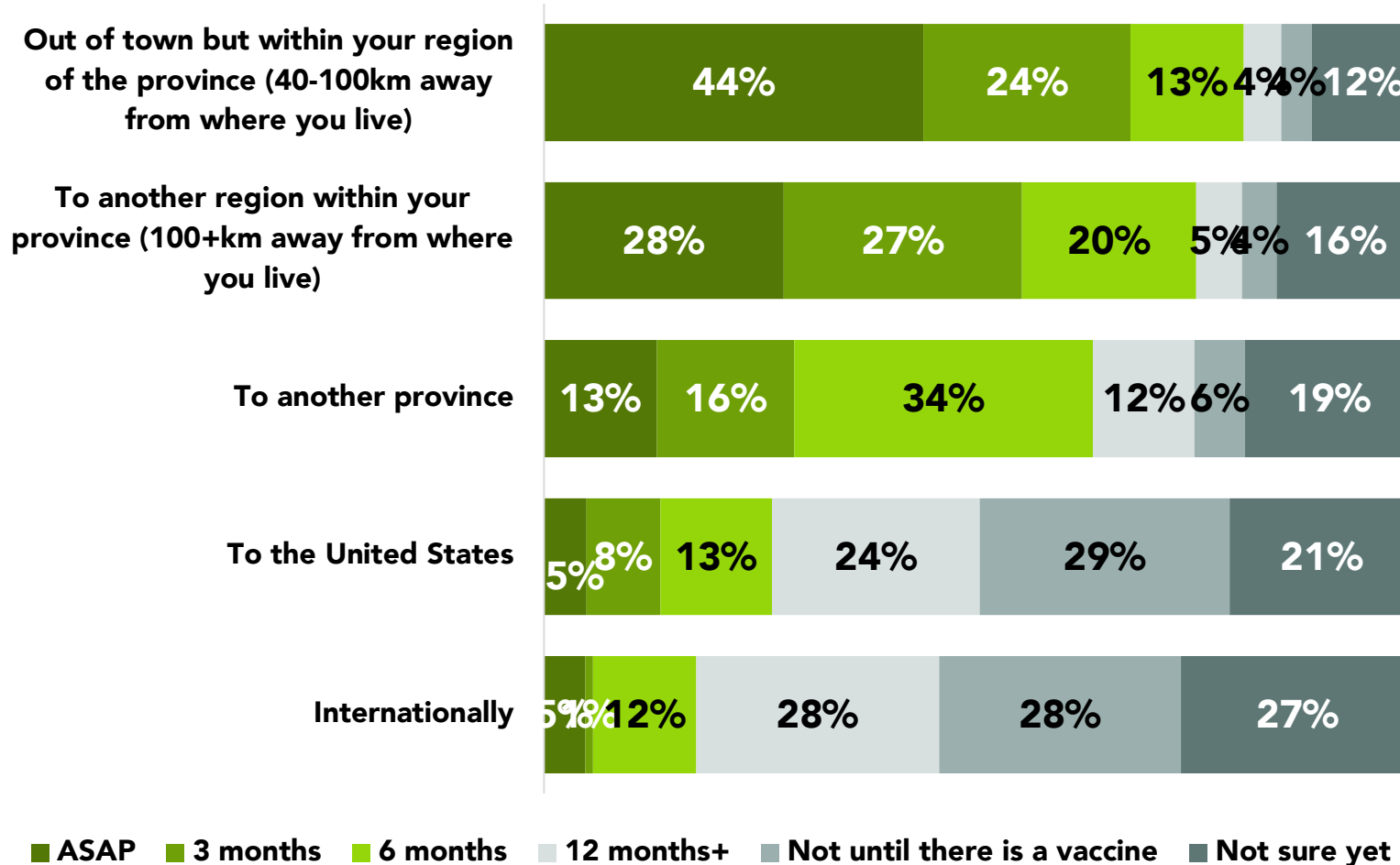


Few residents are eager to get back into their travel habits.

Only 7% are likely to resume their pre-COVID travel habits ASAP.

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

TIME HORIZON FOR DIFFERENT DESTINATIONS

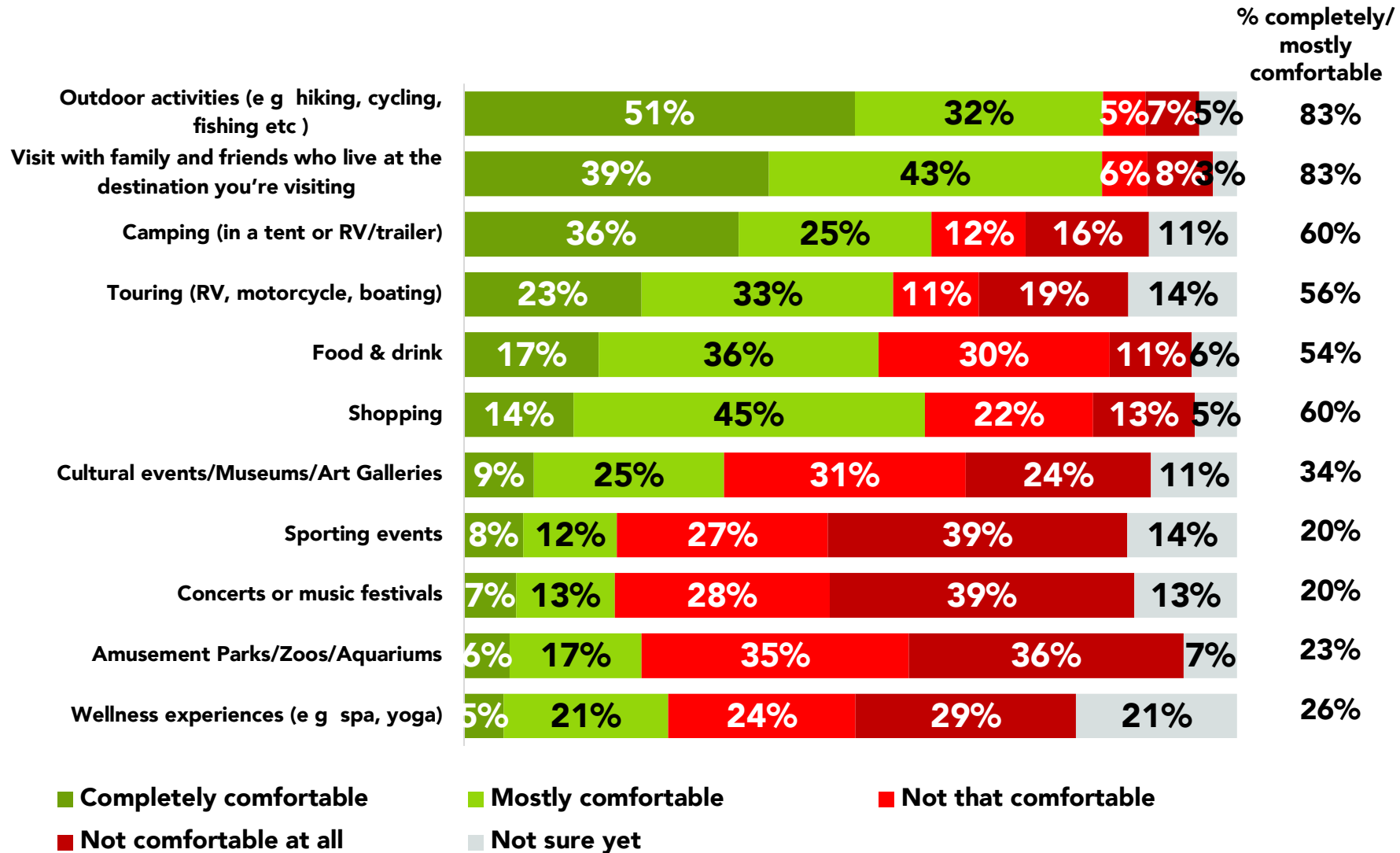


67% of residents in your region say they will travel out of town but within their region this summer.

55% of residents in your region say they will travel out of their region this summer.

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

WHAT TO DO



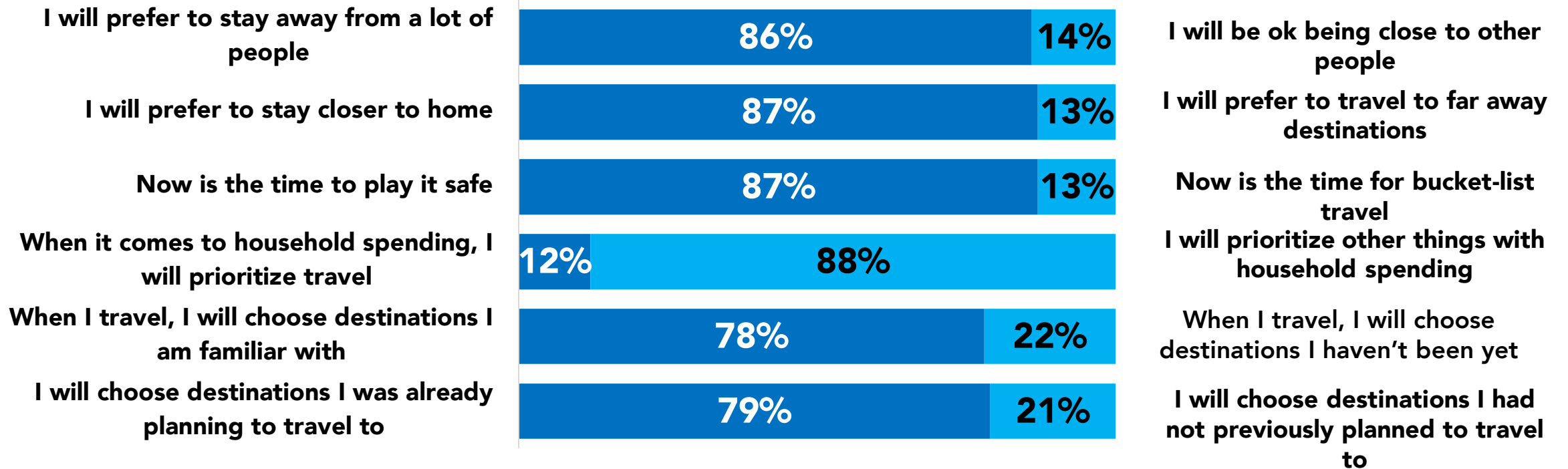
Residents are most comfortable with outdoor activities like hiking, cycling or fishing or visiting with family and friends.

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

CONCERN PROFILES

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FAMILIARITY	59%
COST	39%

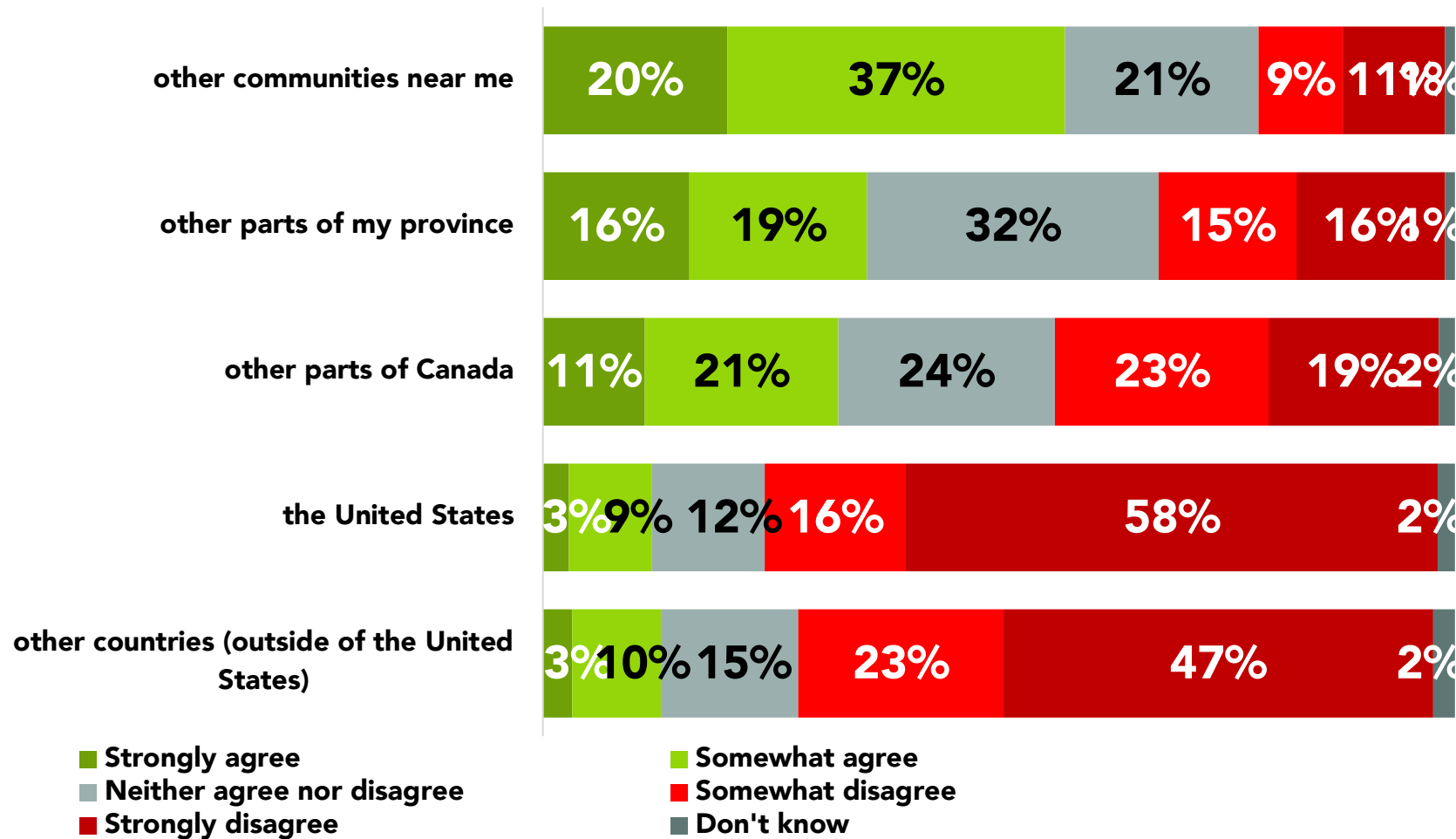
TRAVEL DECISIONS BASED ON...



Again, proximity to home and small groups are key.
Right now, familiarity is also important (78% will travel to destinations they were already planning on).
Travel is also not a big financial priority.

87% say right now is the time to play it safe.

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



57% say they would welcome visitors from other communities near them.

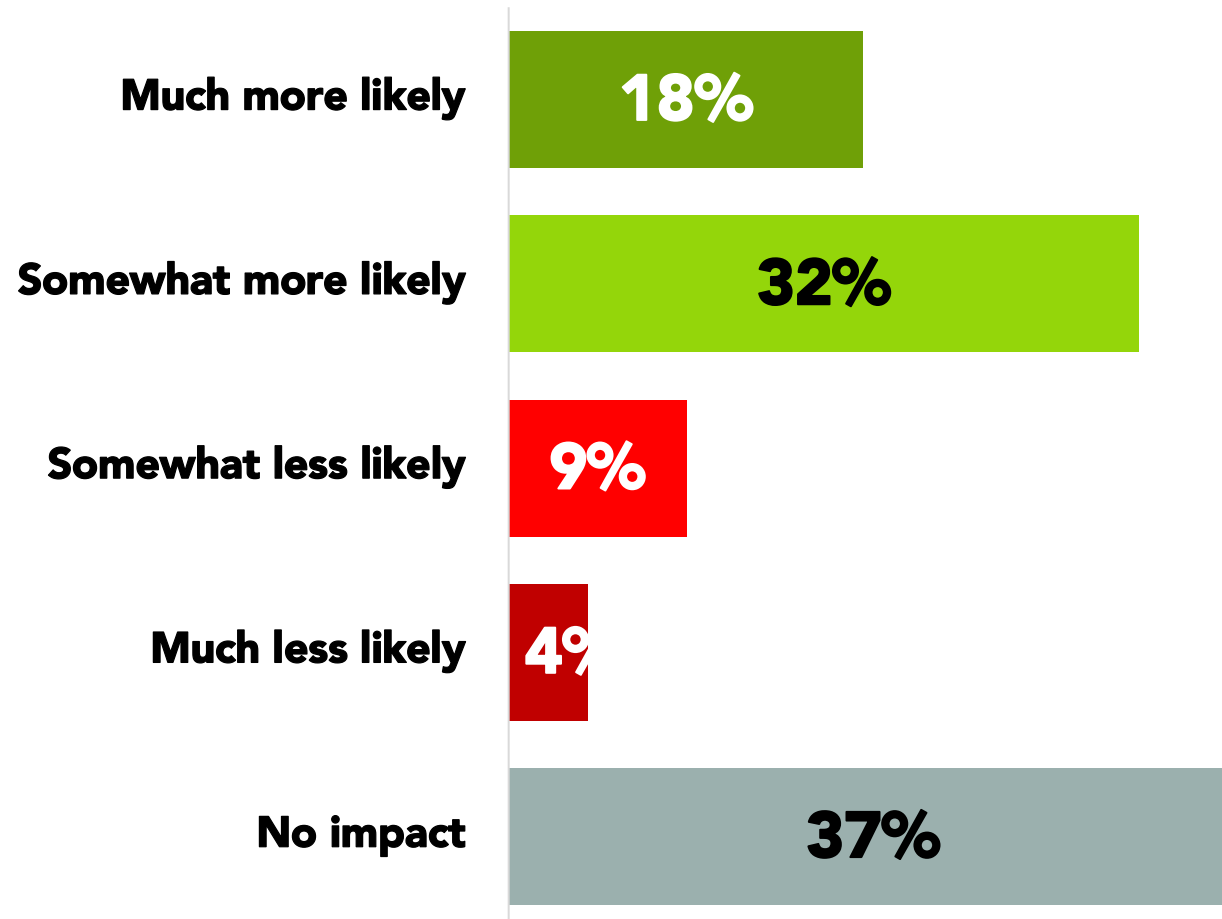
36% say they would welcome visitors from other parts of the province.

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 photograph of an airport terminal with a dark overlay. In the foreground, a black rolling suitcase stands upright. The background shows a busy airport with people walking, sitting on chairs, and standing near information screens. The text 'PART 3: RTO QUESTIONS' is overlaid in large, bold, light blue letters across the middle of the image.

PART 3: RTO QUESTIONS

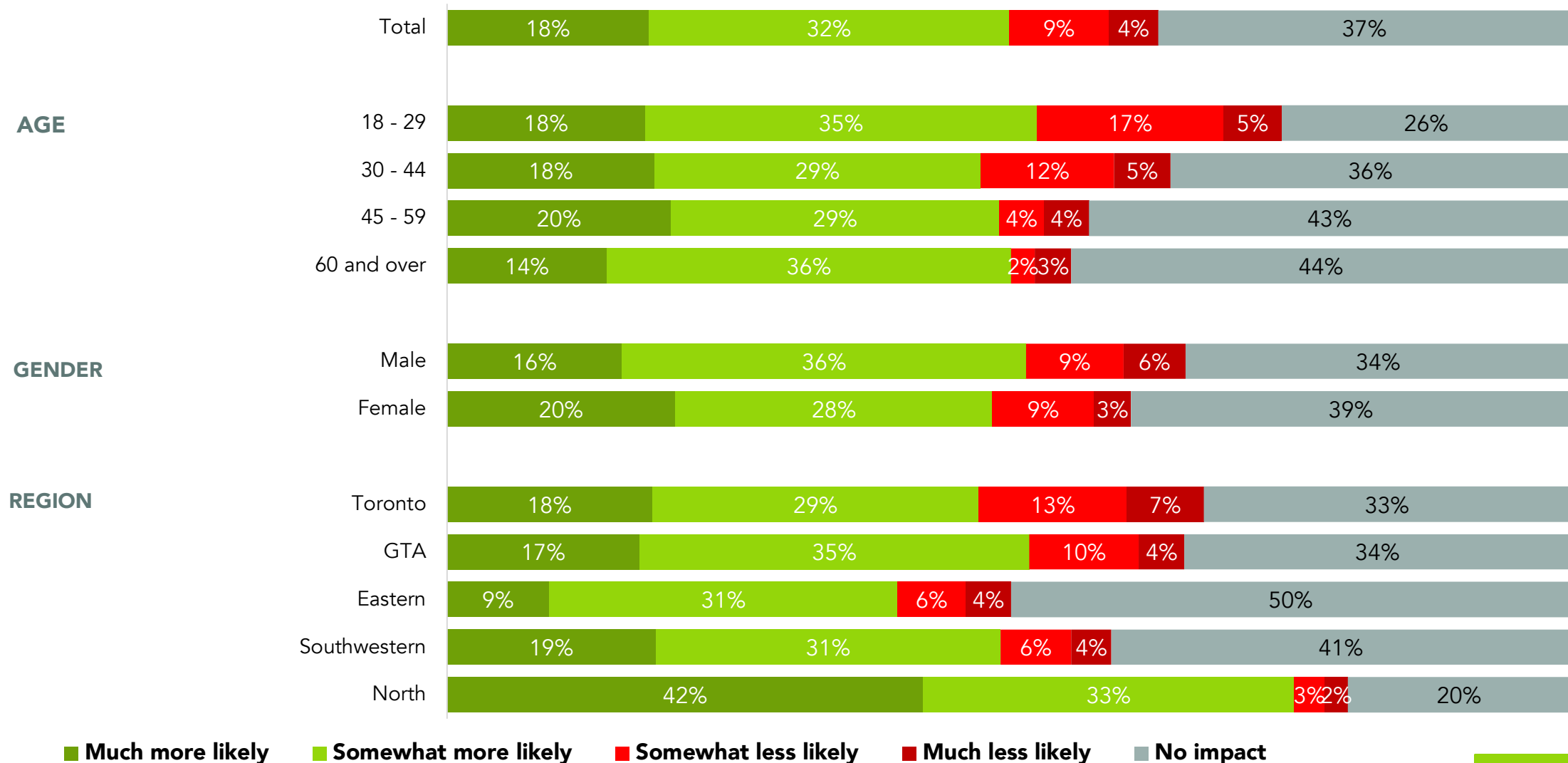
MORE/LESS LIKELY TO VISIT NORTHERN ONTARIO?



Half may be convinced to travel to Northern Ontario with the knowledge that there are few COVID-19 case in the area.

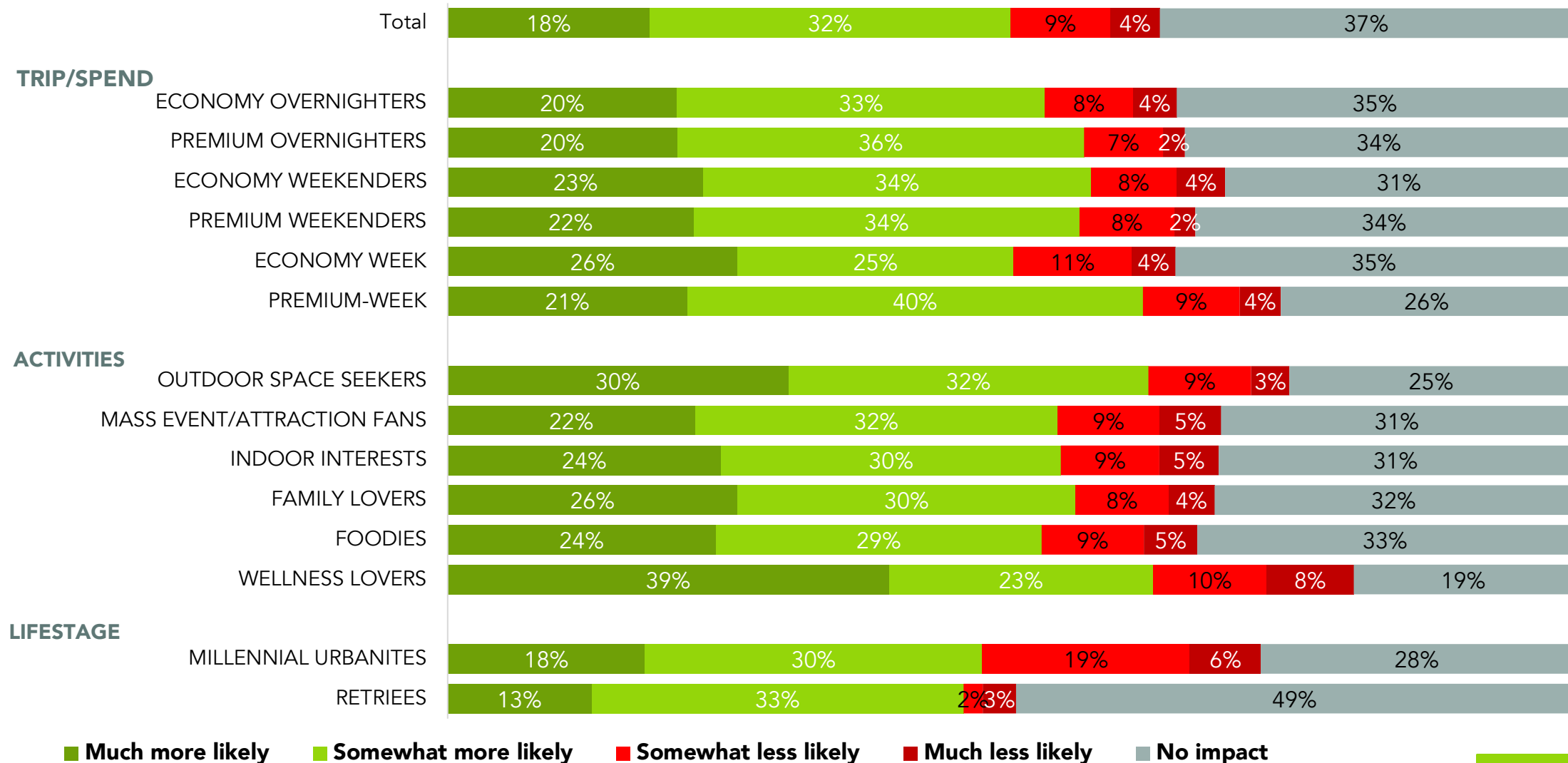
Northern Ontario (north of Parry Sound) currently has less than 1% of total COVID-19 cases in Ontario. Does knowing this make you more or less likely to visit a destination in Northern Ontario in the next 12 months or have no impact?

WORRY ABOUT CORONAVIRUS OUTBREAK



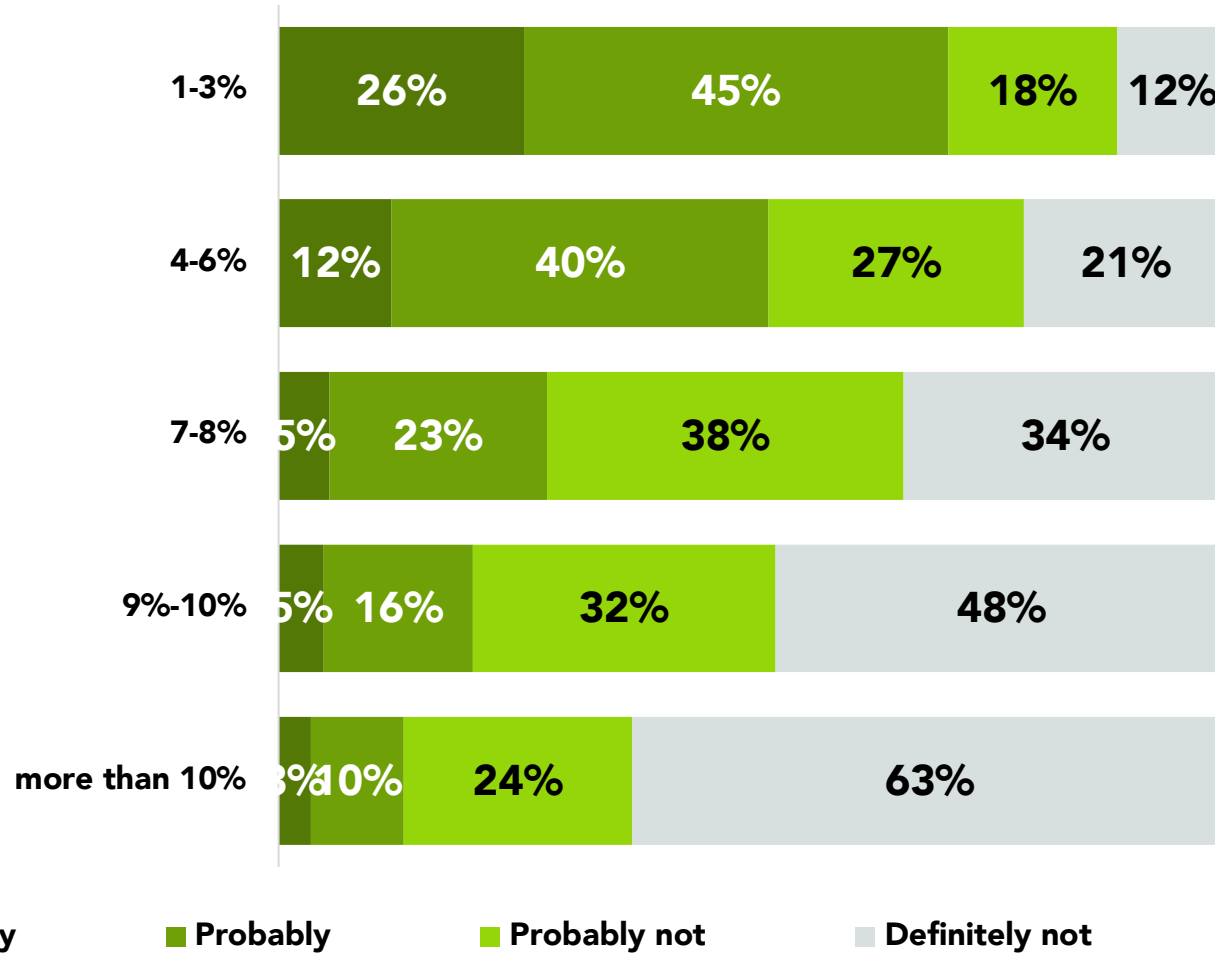
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TOLERANCE FOR RATE CHANGES



Tolerance for rate changes declines sharply after 1-3%.

New policies and procedures to ensure safe facilities will likely lead to increased health and safety costs for tourist operators, hotels, attractions, and others. Would you go to a restaurant, hotel, or attraction if they charged the following rate increases...