

**HESITATIONS FOR
SUMMER/FALL 2020
TRAVEL**

**COVID SPECIFIC
EXPECTATIONS
FRONT & CENTRE**

**WHAT IS THE
STORY?**

ABACUS DATA

**COVID-19 & TRAVEL IMPACT
STUDY
INDIVIDUAL RTO REPORT:
RTO 6
FINAL RESULTS
SURVEY OF ONTARIO RESIDENTS**



METHODOLOGY

The survey was conducted with 3,000 Canadian residents from June 2 to 18, 2020. This include 2000 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 +/- 5.1%, 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 +/- 5.7%, 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=367	Visited a small urban centre for 25%+ of their trips last year in Summer/Fall 2019 AND Love to visit amusement parks/zoos/aquariums, food & drink OR outdoor activities when they travel
RESIDENTS OF YOUR REGION...	n=290	Region 6 FSAs

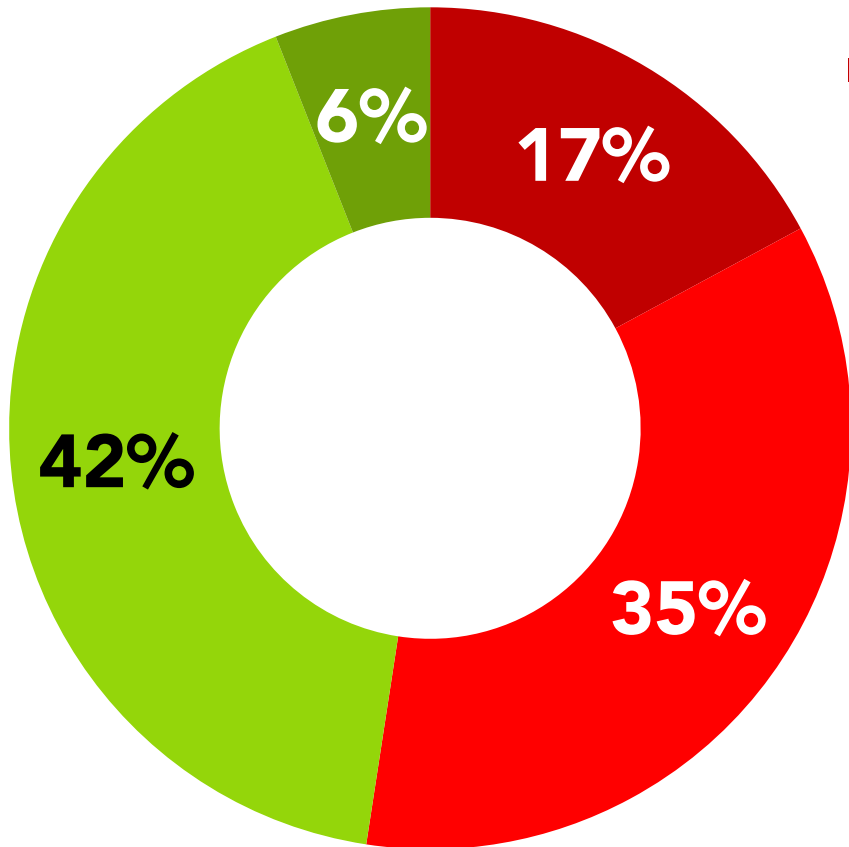
KEY FINDINGS FOR RTO: 6

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. 56% of residents in your region would consider a trip in the region sometime this summer. 45% would consider a trip to a destination in another region. And few are interested in travelling any further.
5. 47% 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 busy atmosphere.

PART 1: VISITORS TO YOUR REGION

WORRY ABOUT THE PANDEMIC



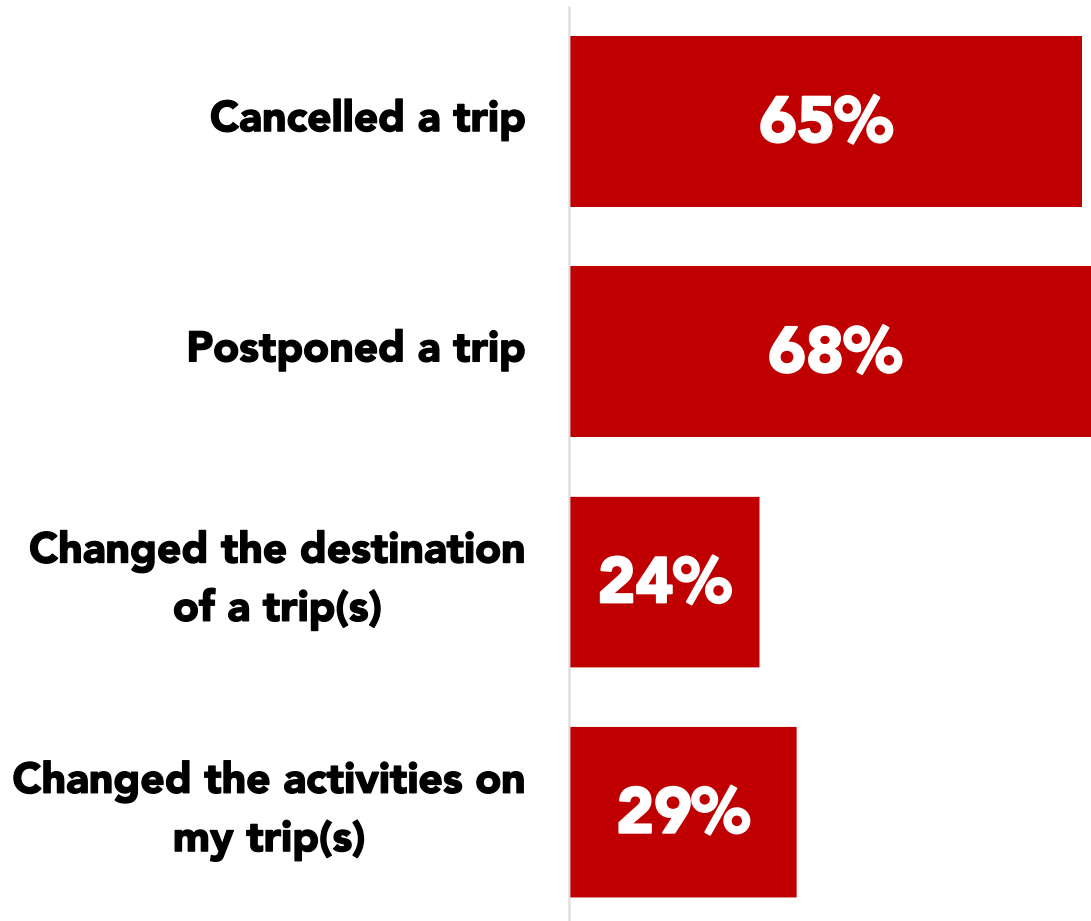
■ Really worried ■ Somewhat worried ■ A little worried ■ Not at all worried

52% say coronavirus is making them really/somewhat worried.

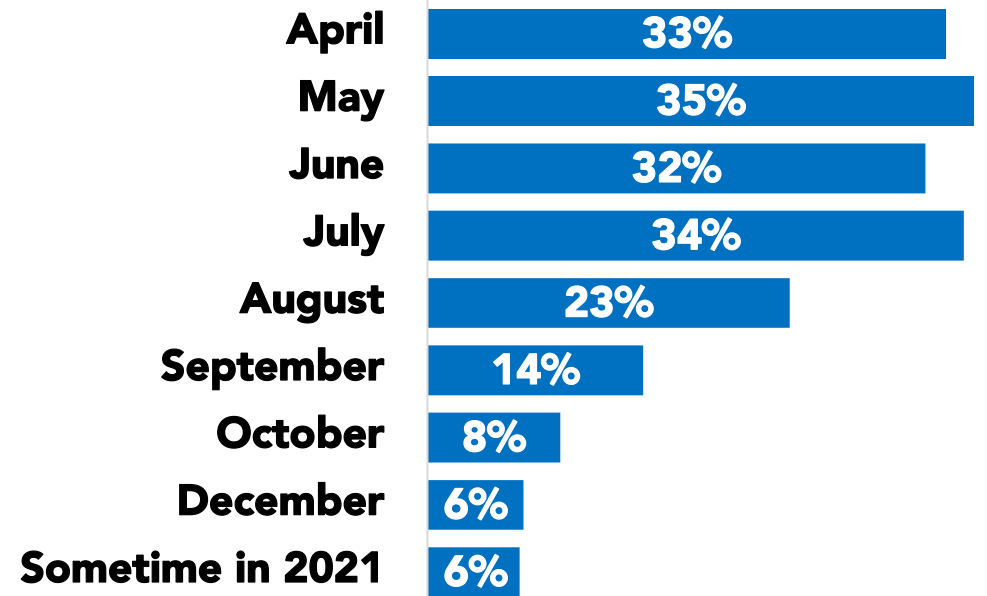
**Among all Ontarian travellers
52% say coronavirus is making them worried.**

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



Visitors to your region are slightly more likely to have cancelled a trip compared to Ontarian travellers overall (65%).



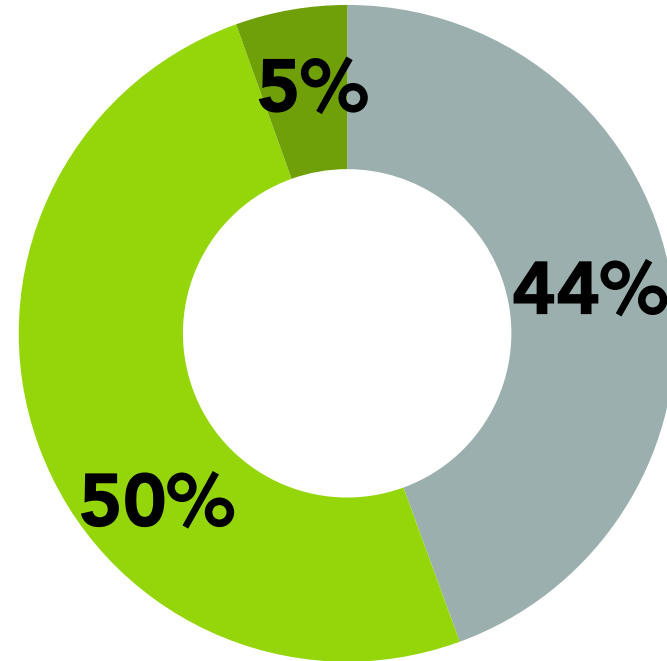
Due to the coronavirus outbreak have you had to do any of the following.../Of the trips that you cancelled/postponed, which month(s) were they scheduled to take place? Please select all that apply

POST-COVID TRAVEL COMFORT

■ I'll test the waters first

■ I'll get back in but carefully

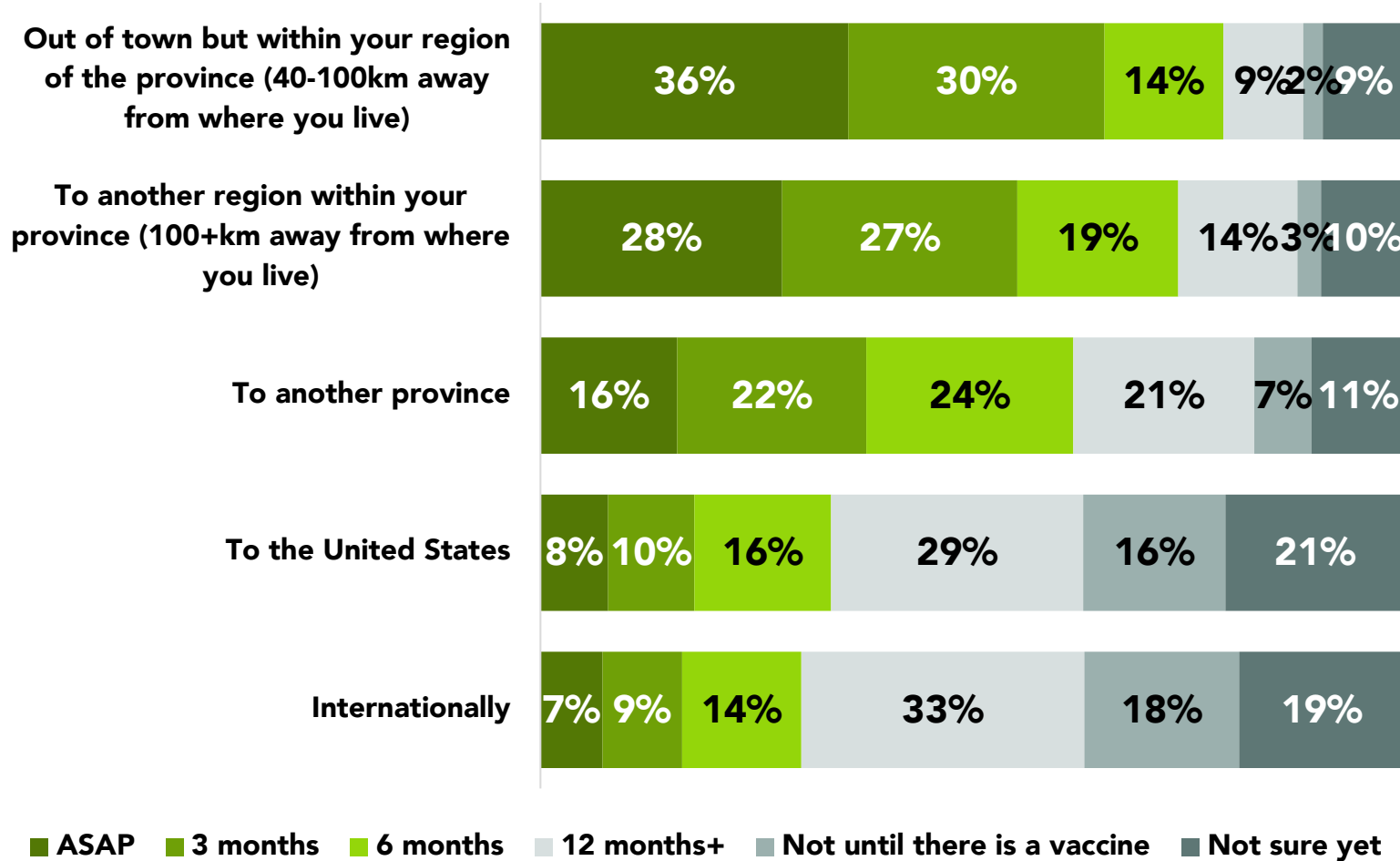
■ I'll jump right back in



Like Ontarian travellers overall, few will jump right back in.

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

TIME HORIZON FOR DIFFERENT DESTINATIONS

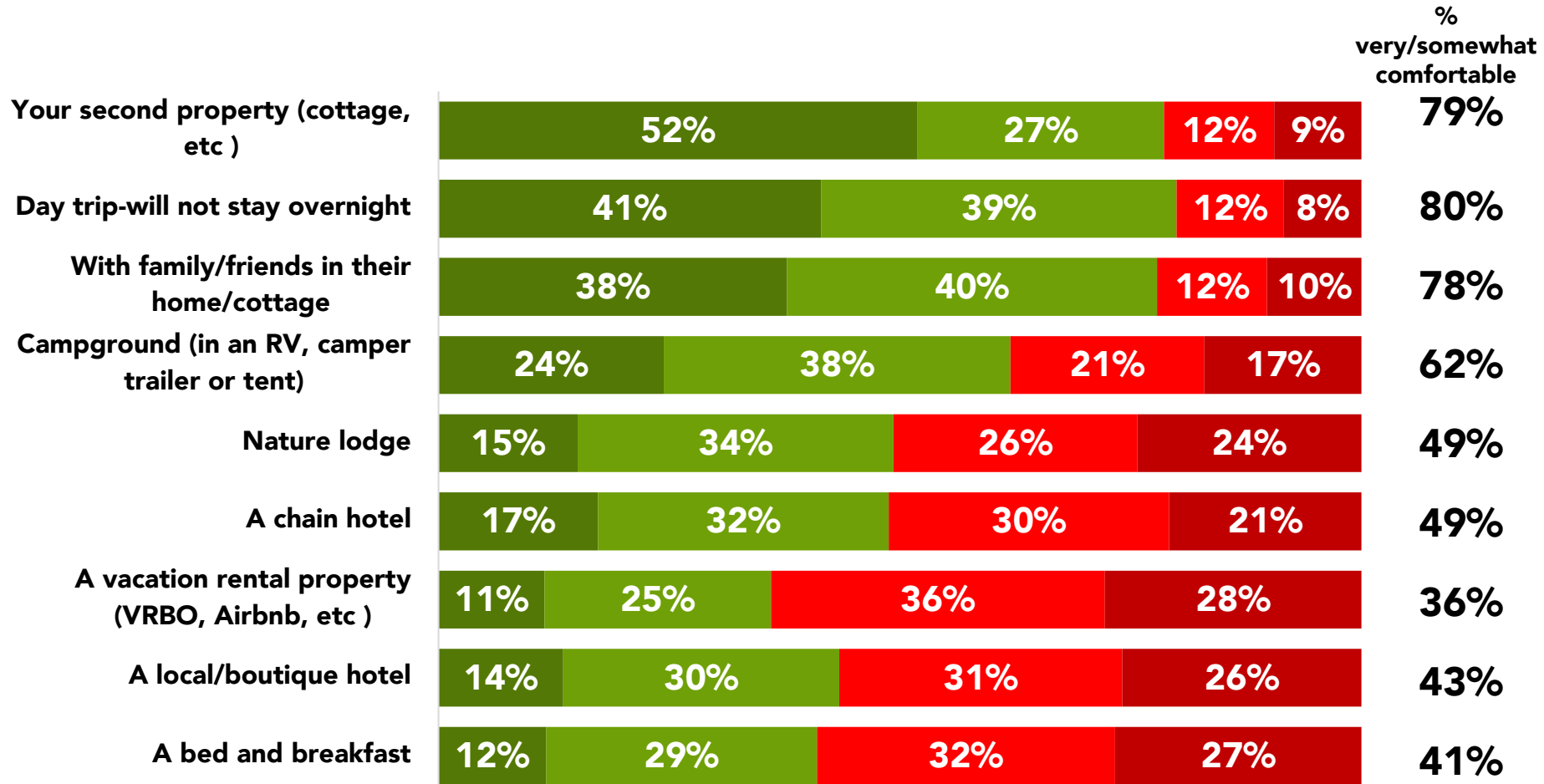


65% of travellers to your region say they will travel out of town but within their region this summer.

55% of travellers to 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

WHERE TO STAY



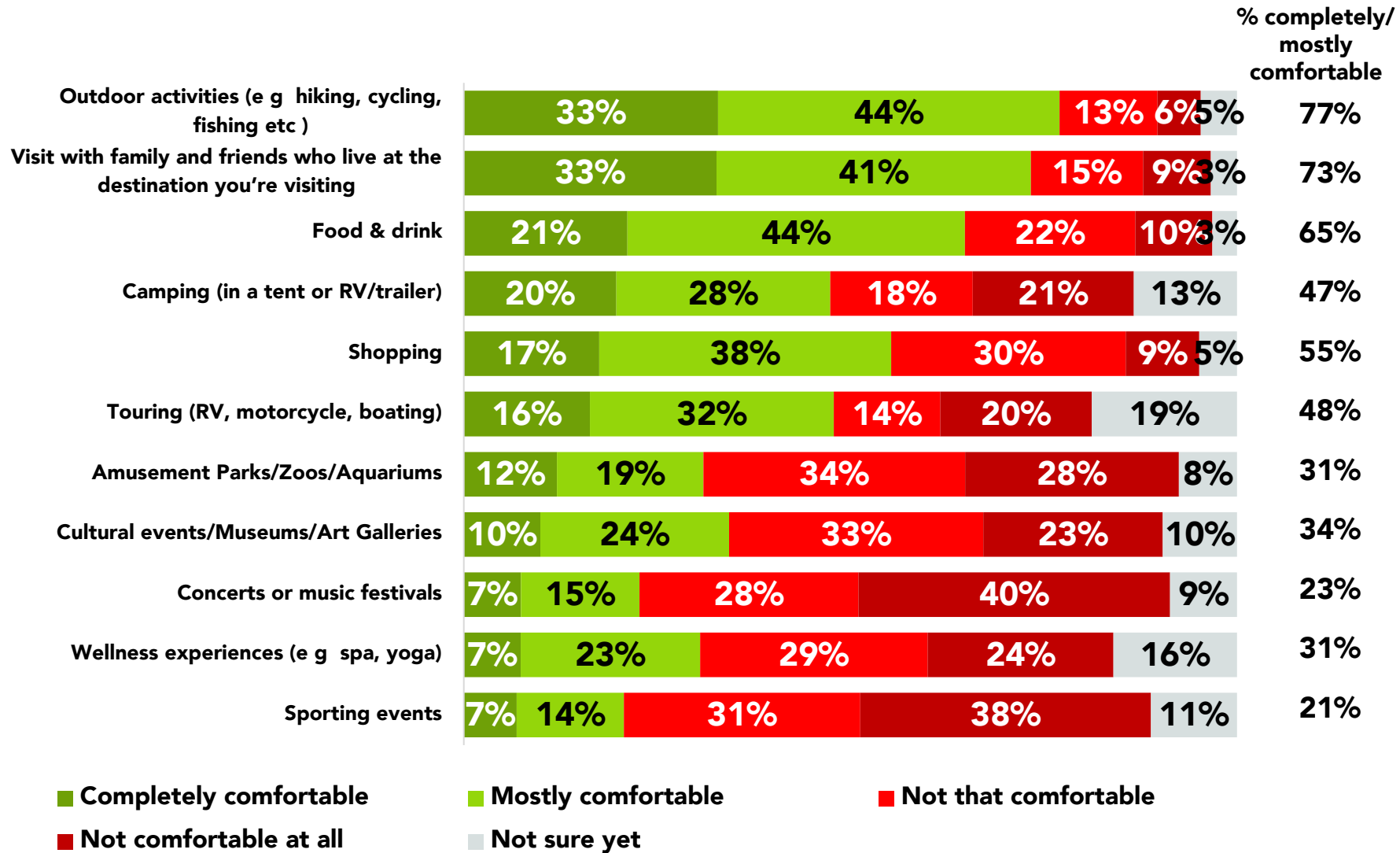
Visitors to your region are most comfortable staying at:...

- Their second property (79%)
- Or not staying overnight (80%)

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

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

WHAT TO DO



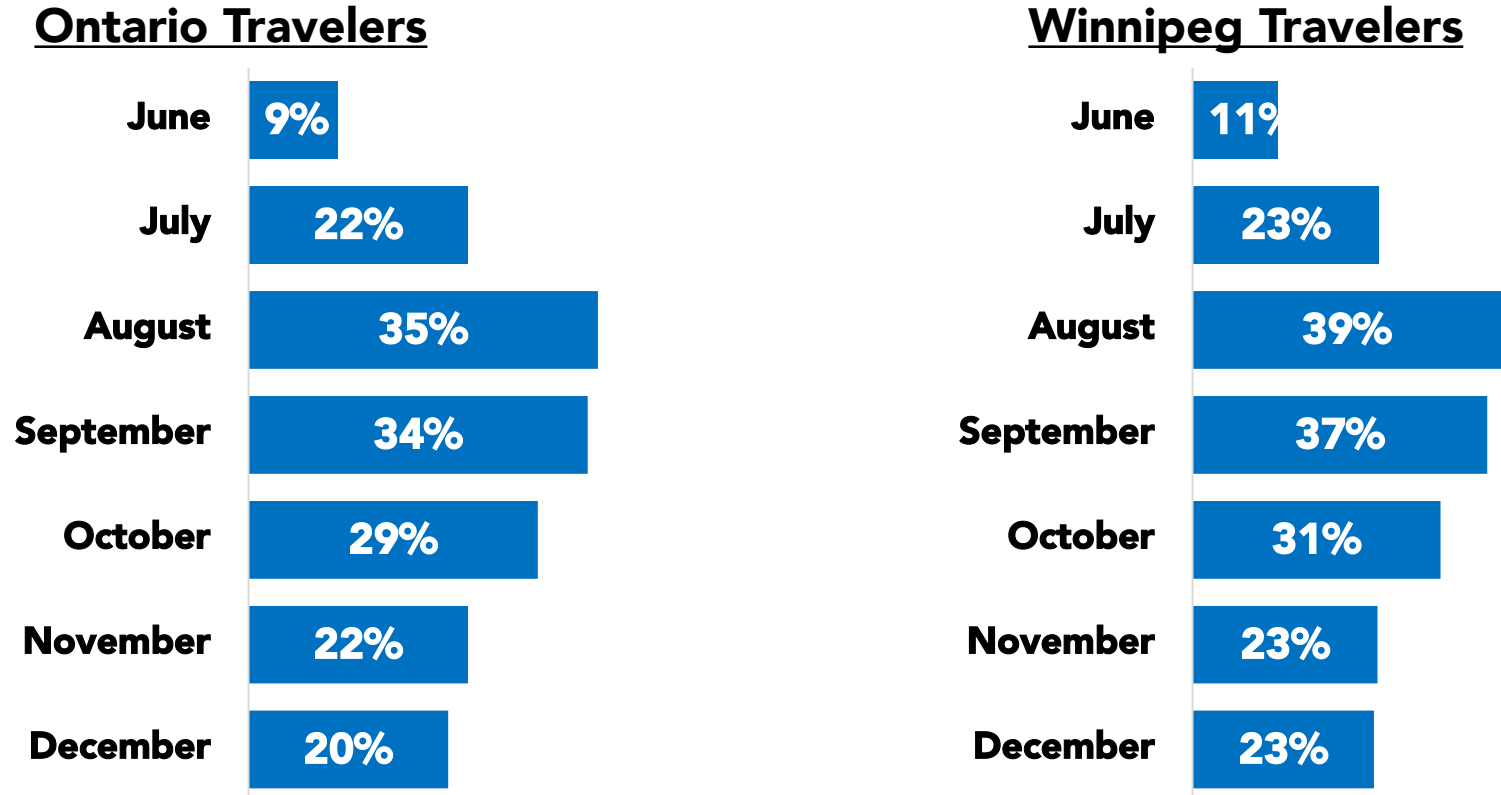
Visiting travelers are also most comfortable with outdoor activities/visiting with family/friends.

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	54%
BEING CLOSE TO HOME	45%
COVID-19 PROCEDURES AND COMMS	62%
FAMILIARITY	55%
COST	47%

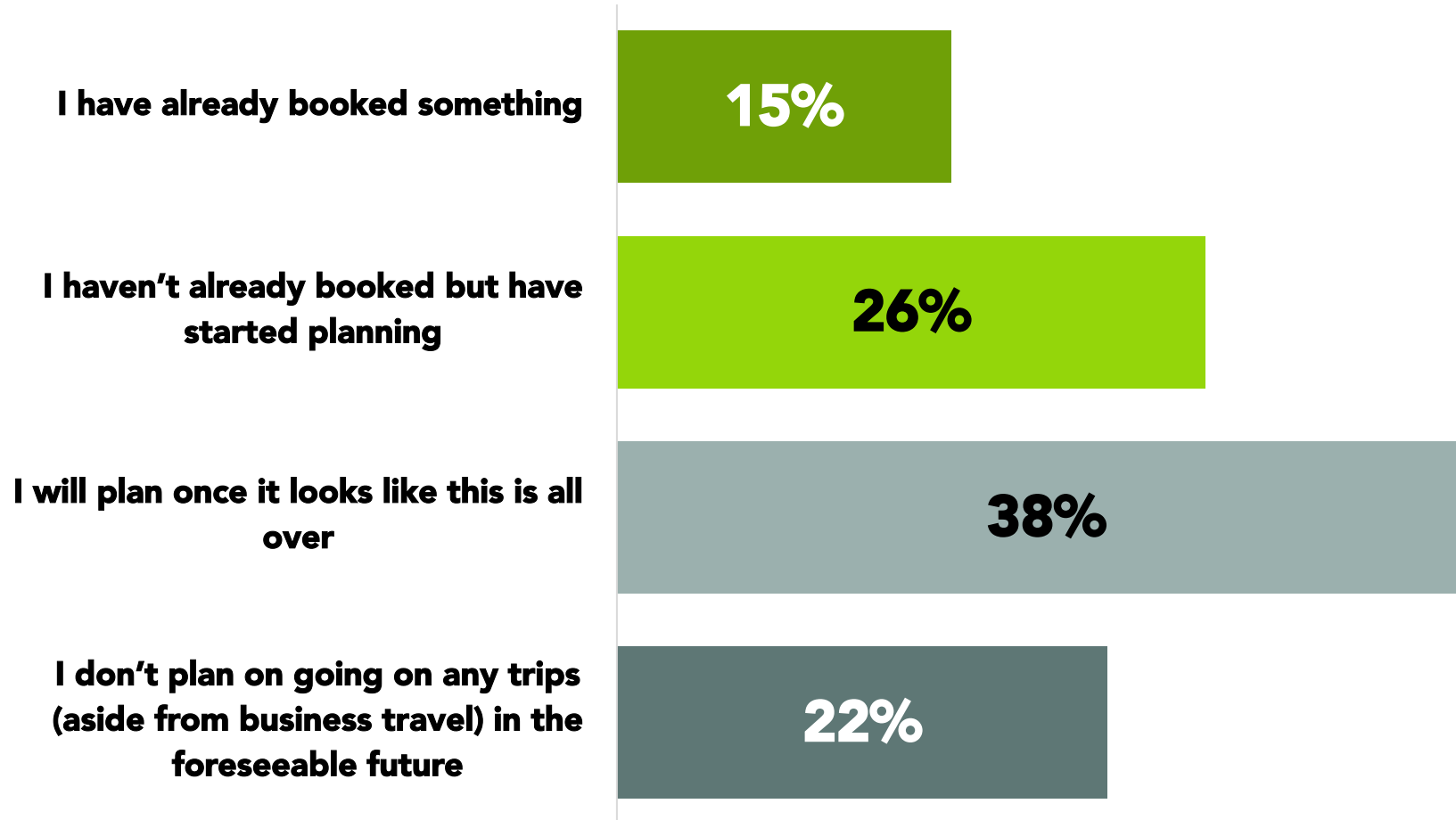
COMFORTABLE WITH ONTARIO TRAVEL PLANS?



Visiting travelers are 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

BOOKINGS AND INTENTIONS

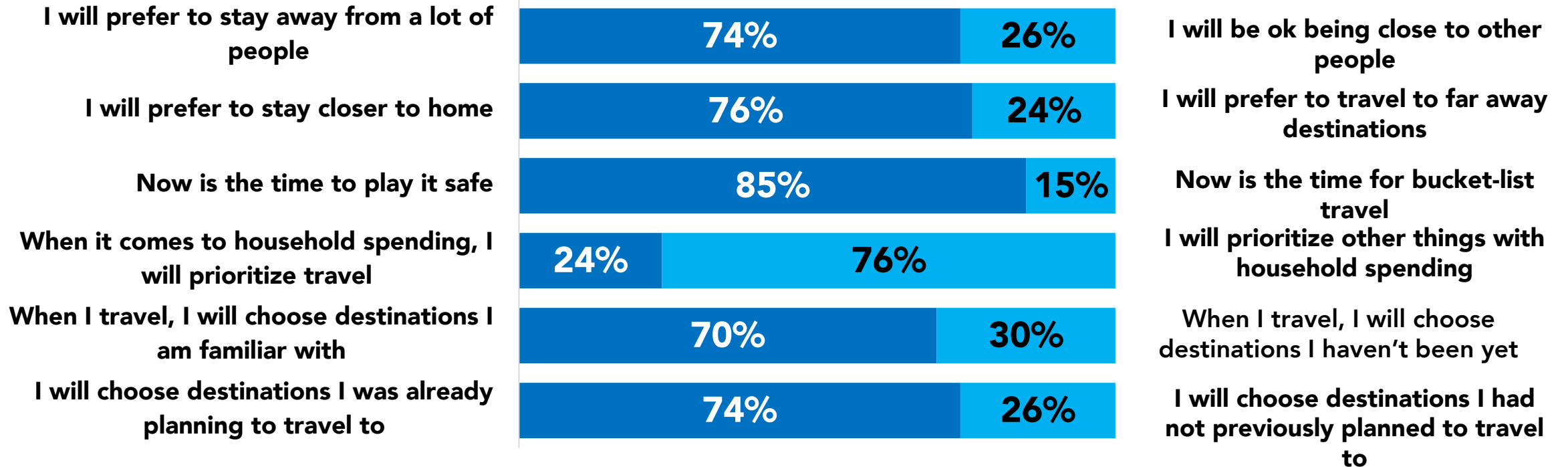


As with Ontarians, very few have actually booked travel so far.

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?

TRAVEL DECISIONS BASED ON...



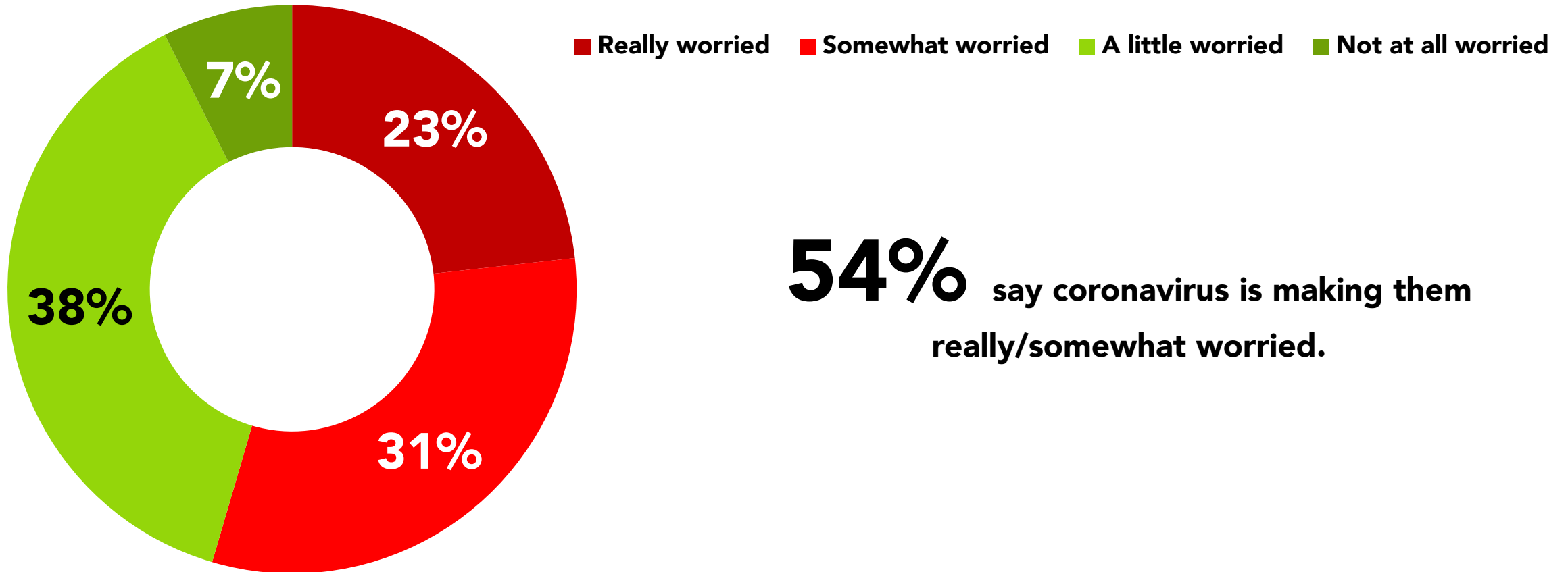
Again, proximity to home and small groups are key.
Right now, familiarity is also important (70% will travel to destinations they were already planning on).
Travel is also not a big financial priority.

85% say right now is the time to play it safe.

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 'PART 2: RESIDENTS OF YOUR REGION' is overlaid in large, bold, light blue letters across the center of the image.

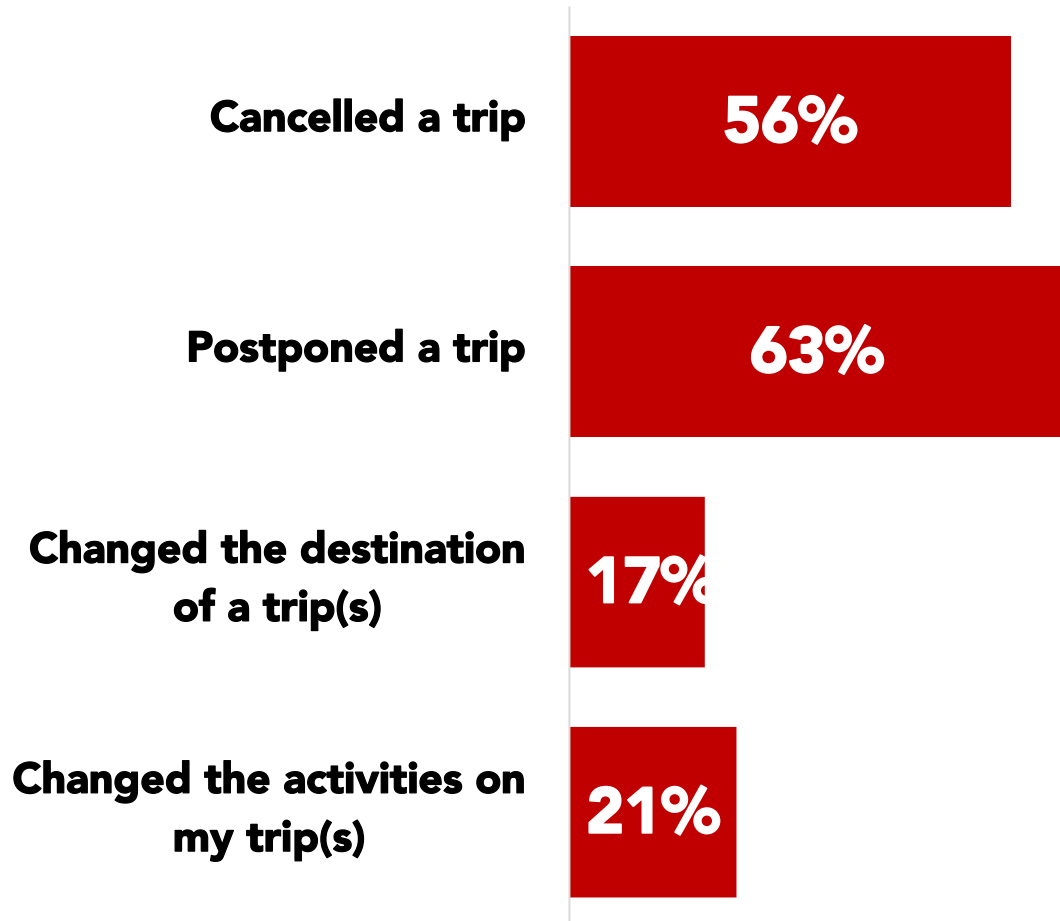
PART 2: RESIDENTS OF YOUR REGION

WORRY ABOUT THE PANDEMIC

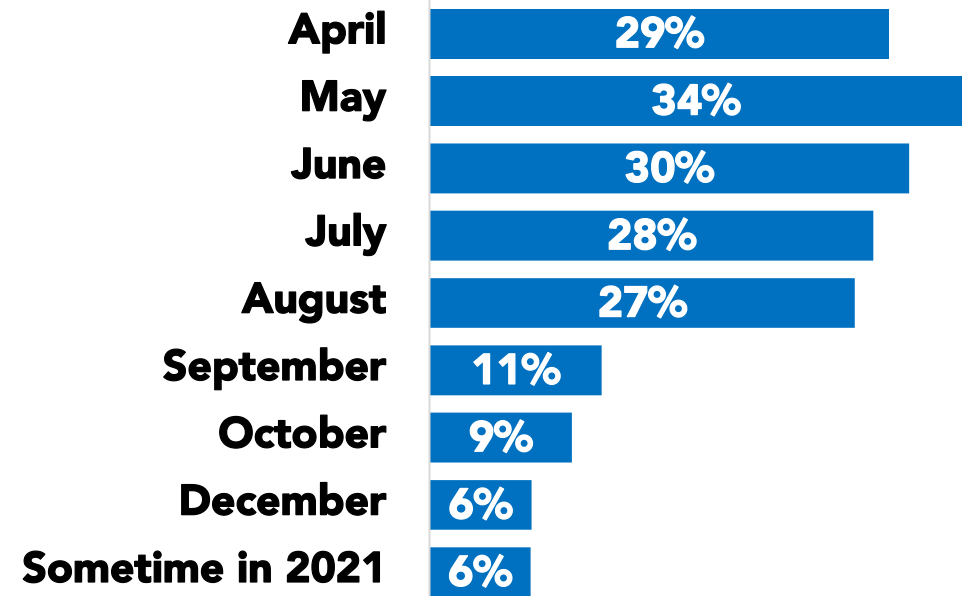


Overall, how worried, if at all, is the situation with the coronavirus or COVID-19 making you right now?/To what extent, if at all, are you worried about the following when it comes to the COVID-19 pandemic?

IMPACT ON TRAVEL PLANS



Over half have cancelled and nearly two-thirds have postponed at least one trip.



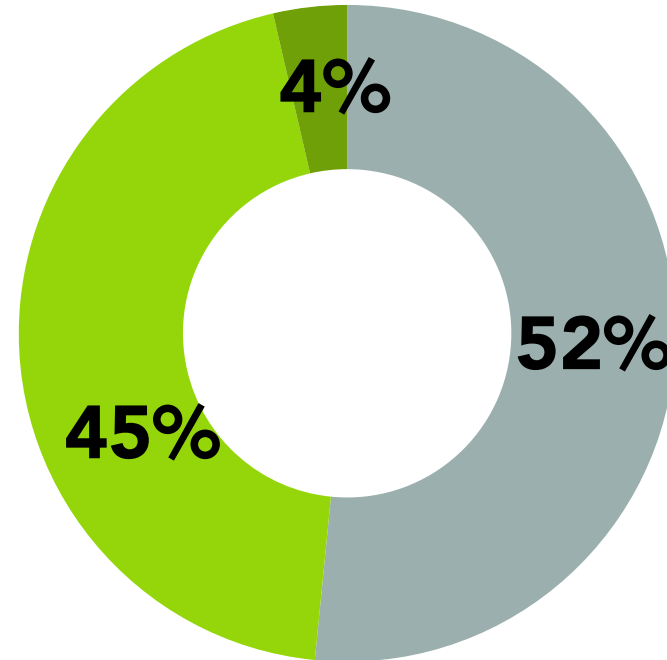
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POST-COVID TRAVEL COMFORT

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■ I'll get back in but carefully

■ I'll jump right back in

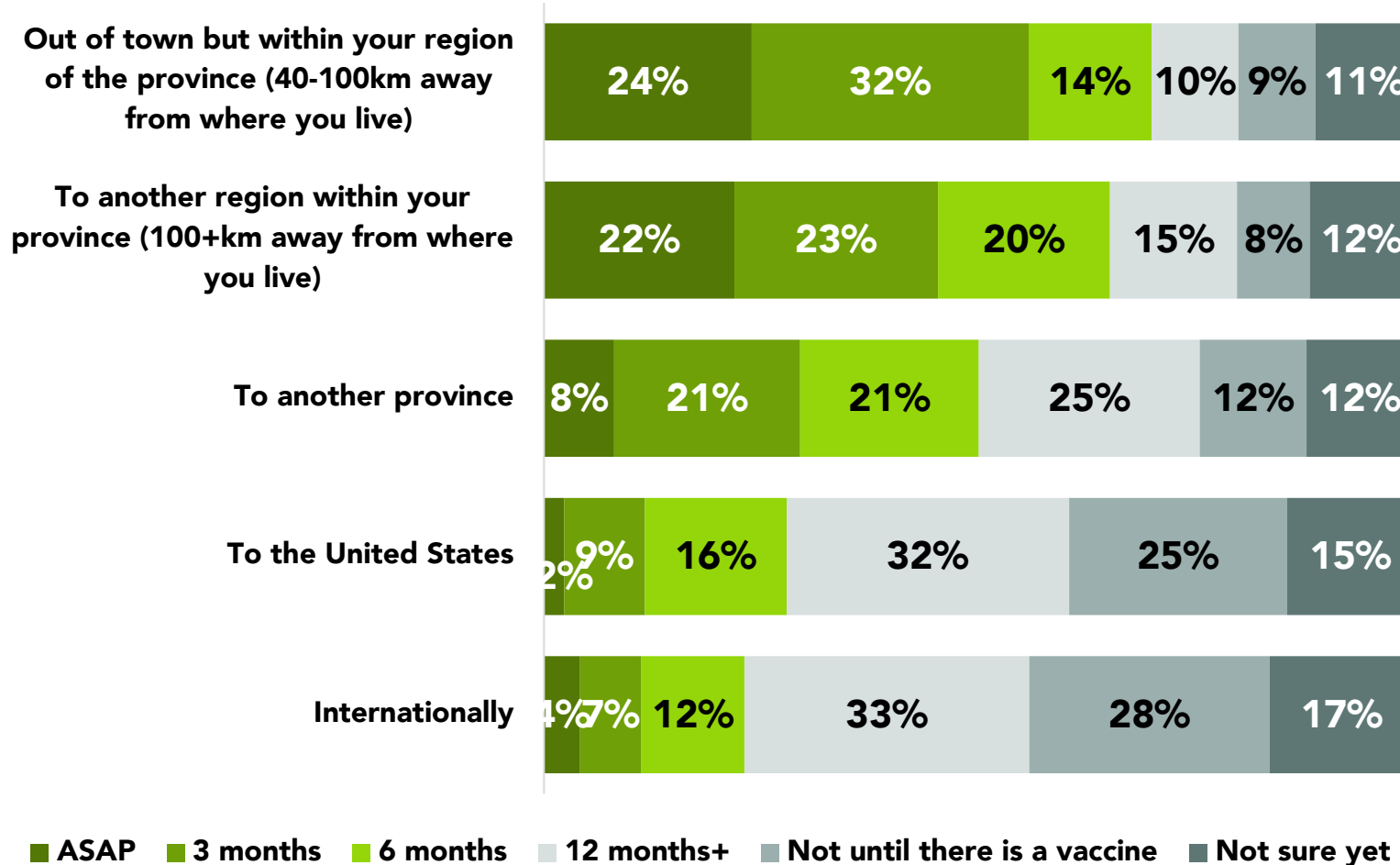


Few residents are eager to get back into their travel habits.

Only 4% 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

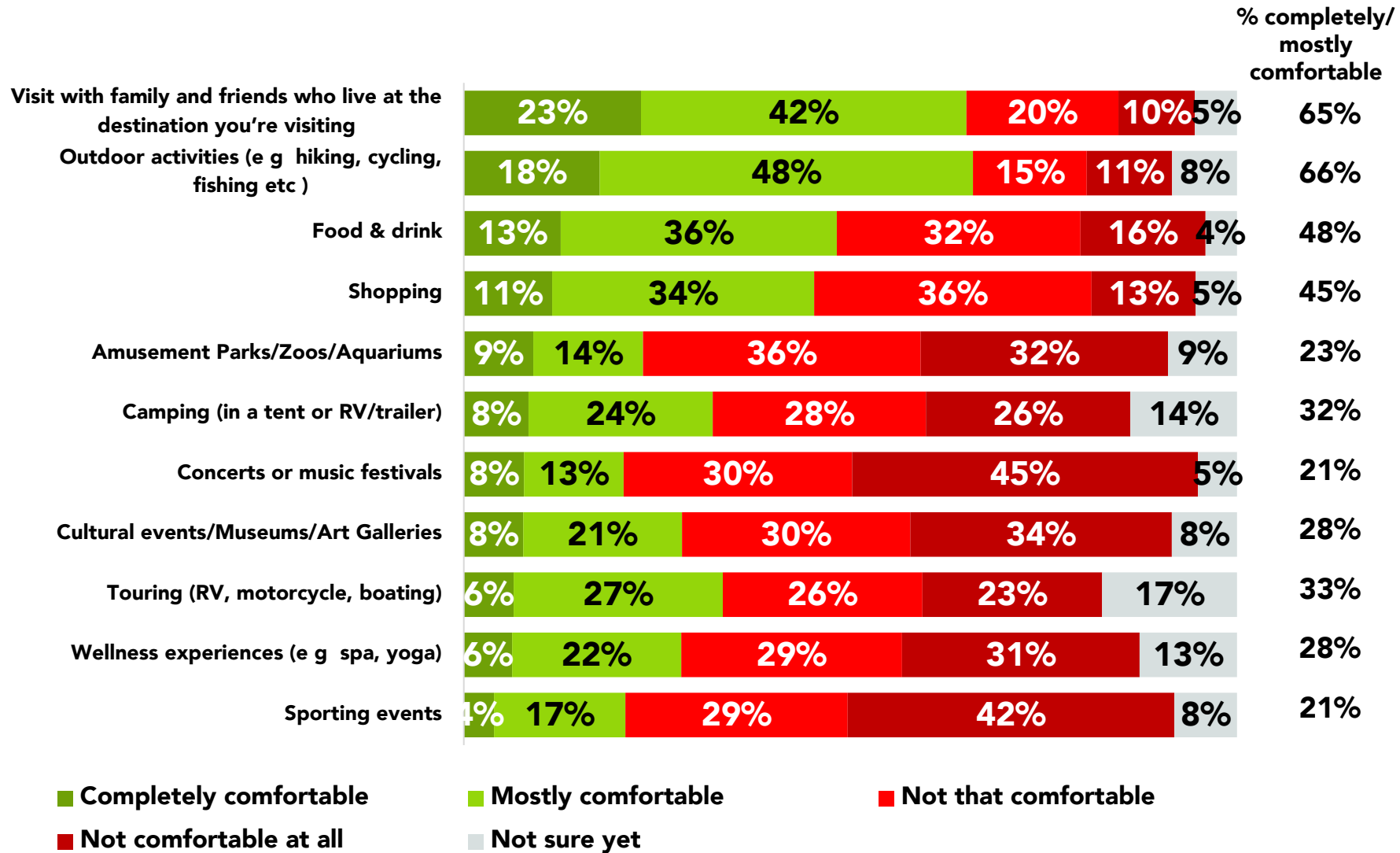


56% of residents in your region say they will travel out of town but within their region this summer.

45% 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



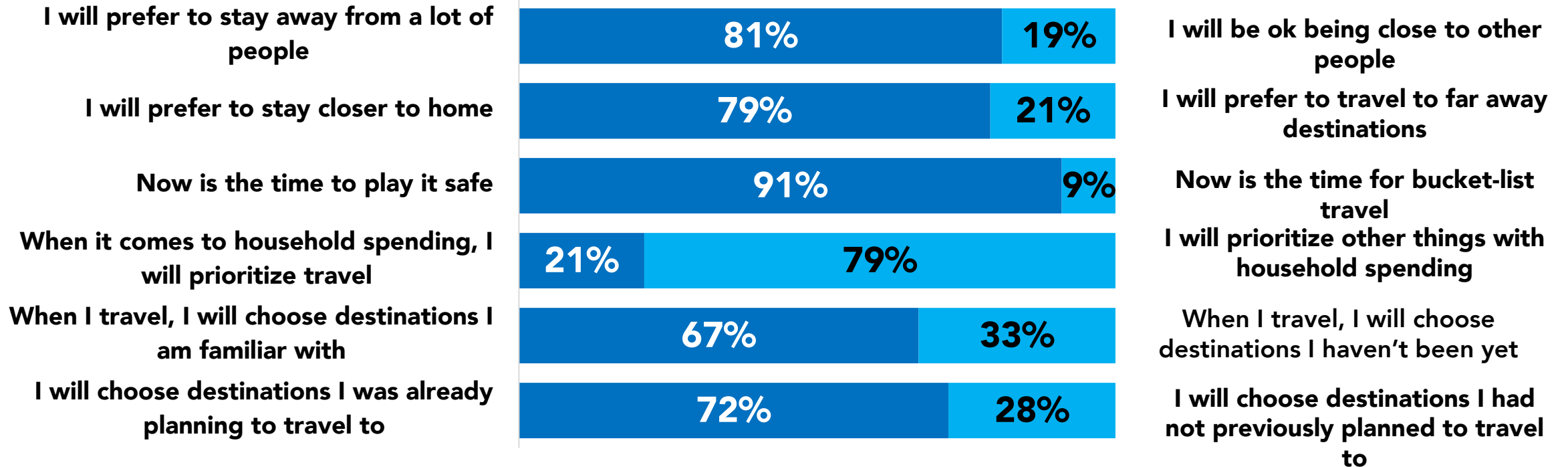
Residents are most comfortable with outdoor activities like hiking, cycling or fishing or visiting with family and friends.

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

CONCERN PROFILES

<i>IMPORTANCE OF THE FOLLOWING AS A RESULT OF COVID-19...</i>	<i>% OF POP FOR WHICH THIS IS A CONCERN</i>
PHYSICAL DISTANCING	57%
BEING CLOSE TO HOME	48%
COVID-19 PROCEDURES AND COMMS	59%
FAMILIARITY	54%
COST	46%

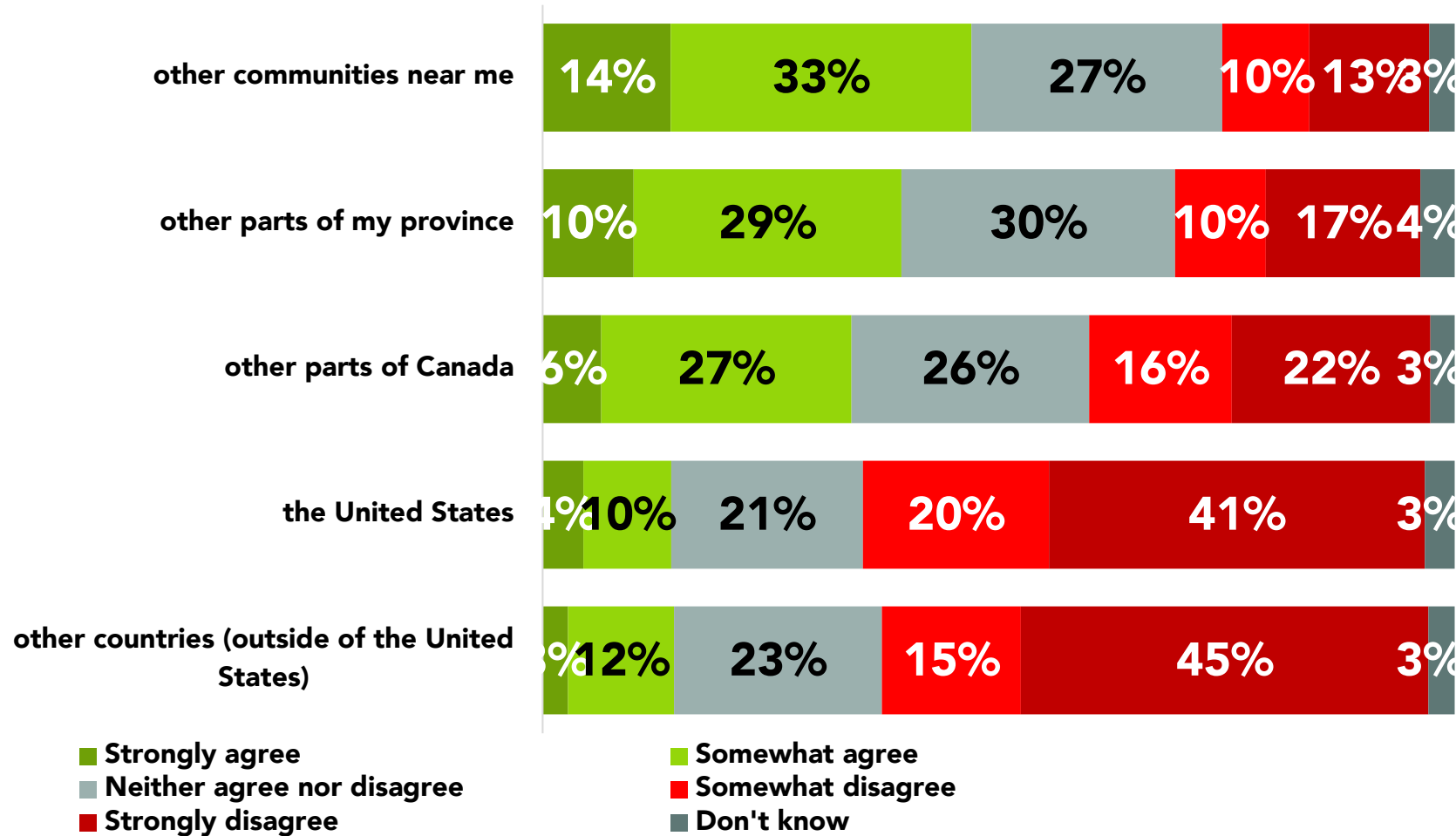
TRAVEL DECISIONS BASED ON...



Again, proximity to home and small groups are key.
Right now, familiarity is also important (67% will travel to destinations they were already planning on).
Travel is also not a big financial priority.

91% say right now is the time to play it safe.

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



47% say they would welcome visitors from other communities near them.

39% say they would welcome visitors from other parts of the province.

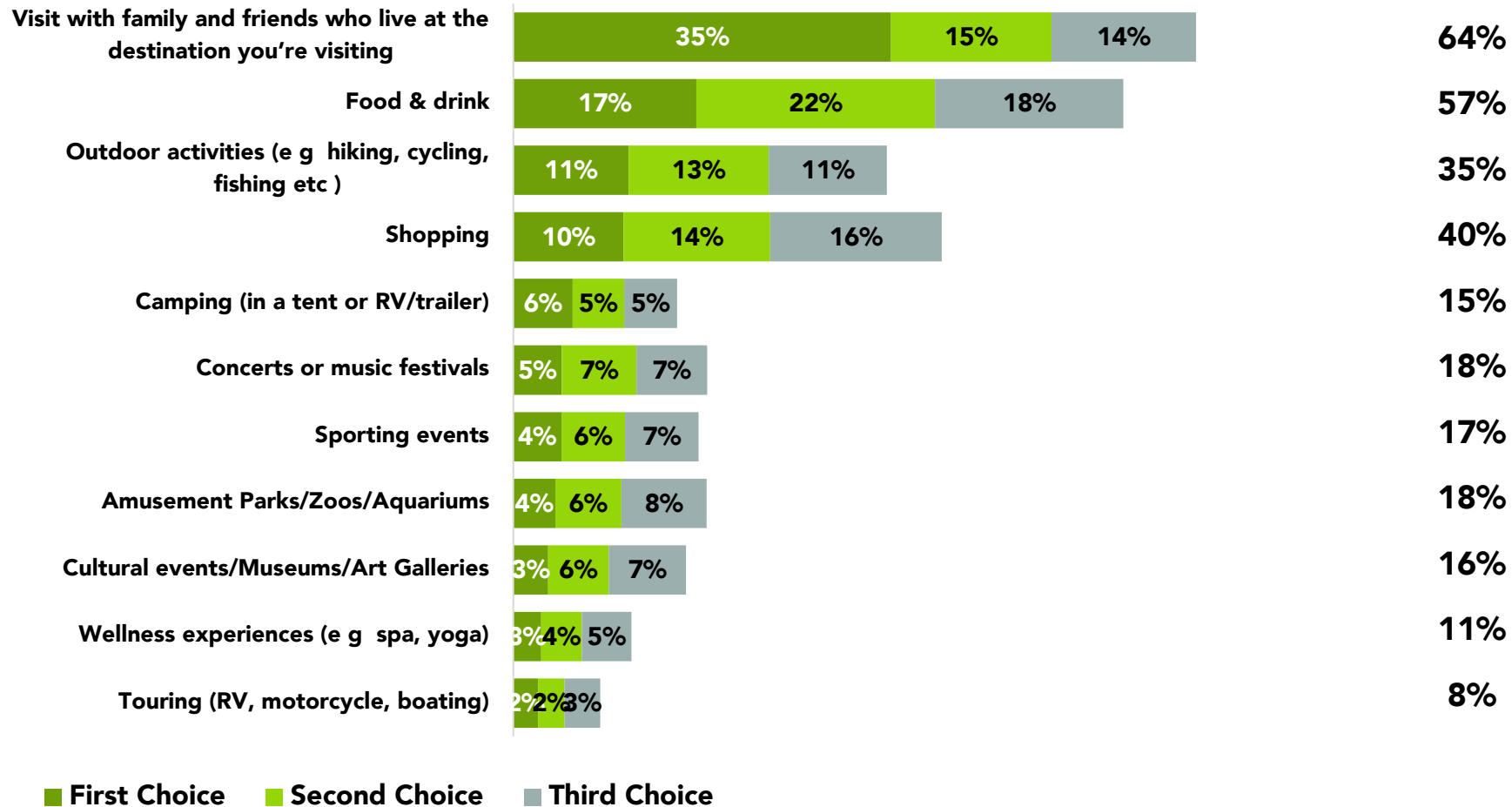
I would welcome visitors travelling to my community from X: Once travel restrictions are lifted, to what extent do you agree or disagree with each of the following statements

PART 3: RTO QUESTIONS

***all respondents**

WHAT ARE YOU LOOKING MOST FORWARD TO?

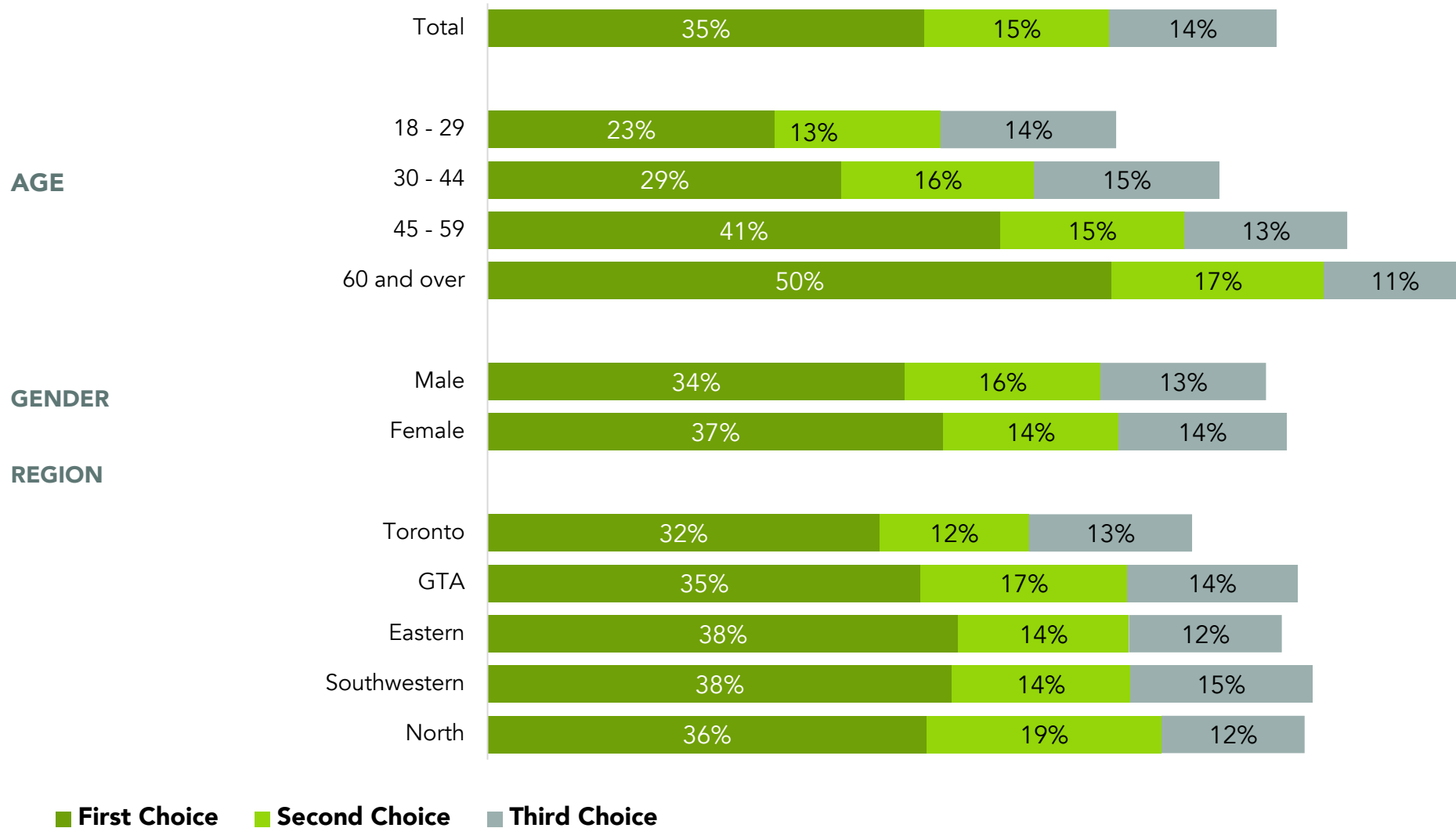
% of top choices



Individuals are most looking forward to seeing their family and returning to restaurants for food and drink once the travel restrictions are lifted. People are least excited for touring/wellness experiences.

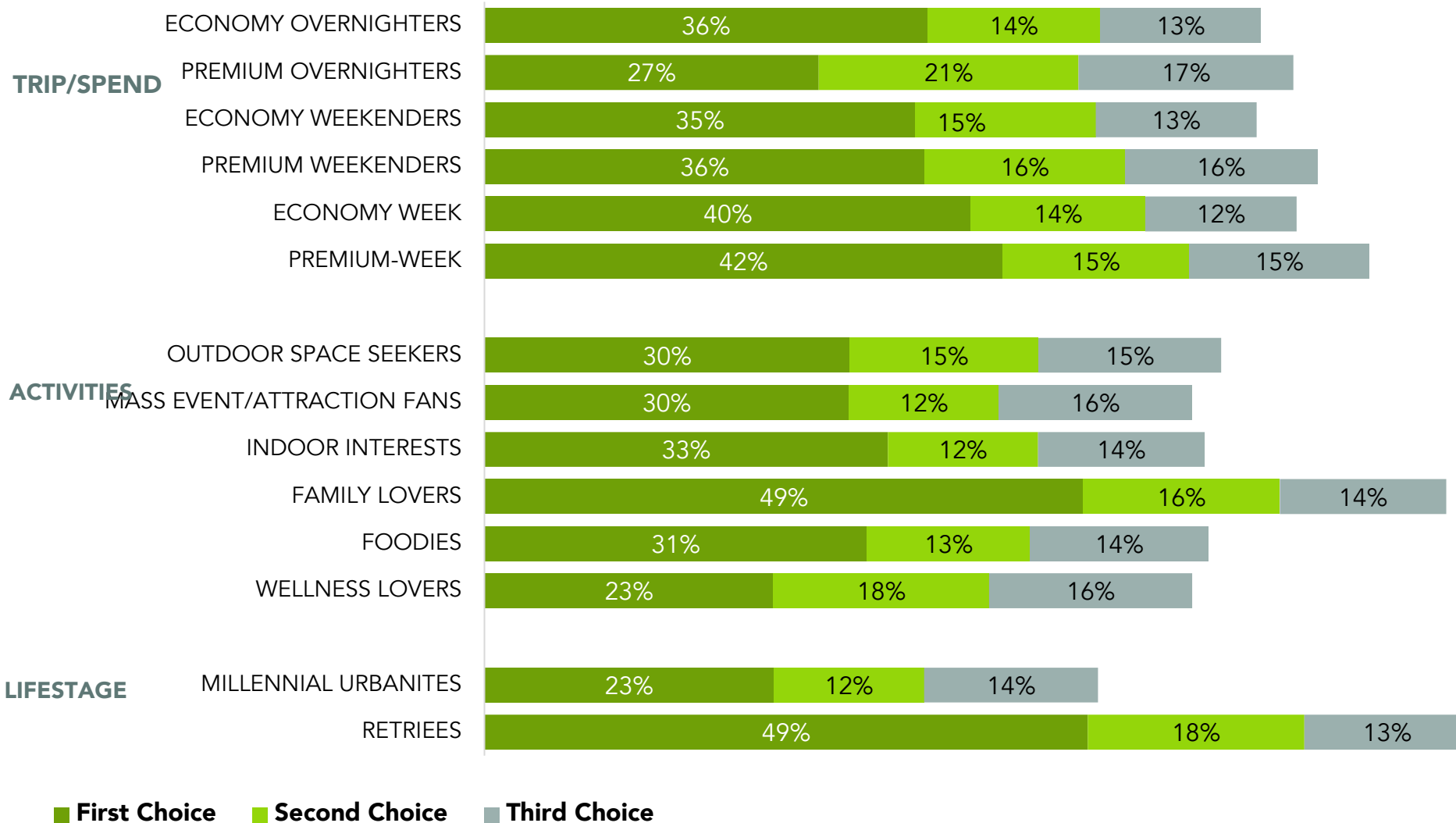
Imagine that travel restrictions are lifted soon and public officials say it is safe to travel, but there is no vaccine yet for COVID-19. What are you most looking forward to...

VISIT WITH FAMILY AND FRIENDS



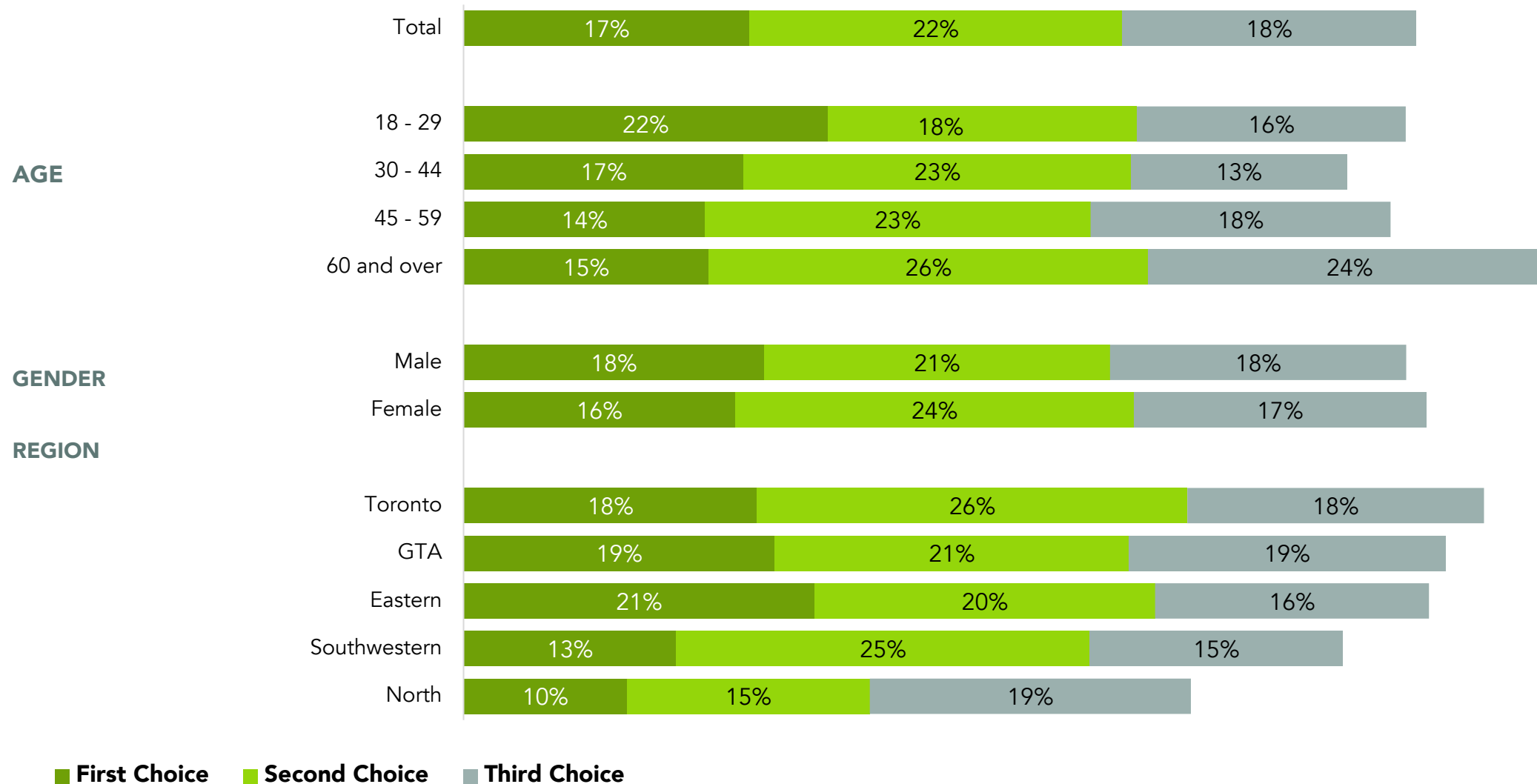
Visit with family and friends who live at the destination you're visiting: Imagine that travel restrictions are lifted soon and public officials say it is safe to travel, but there is no vaccine yet for COVID-19. What are you most looking forward to... Please rank the top three things you are most looking forward.

VISIT WITH FAMILY AND FRIENDS



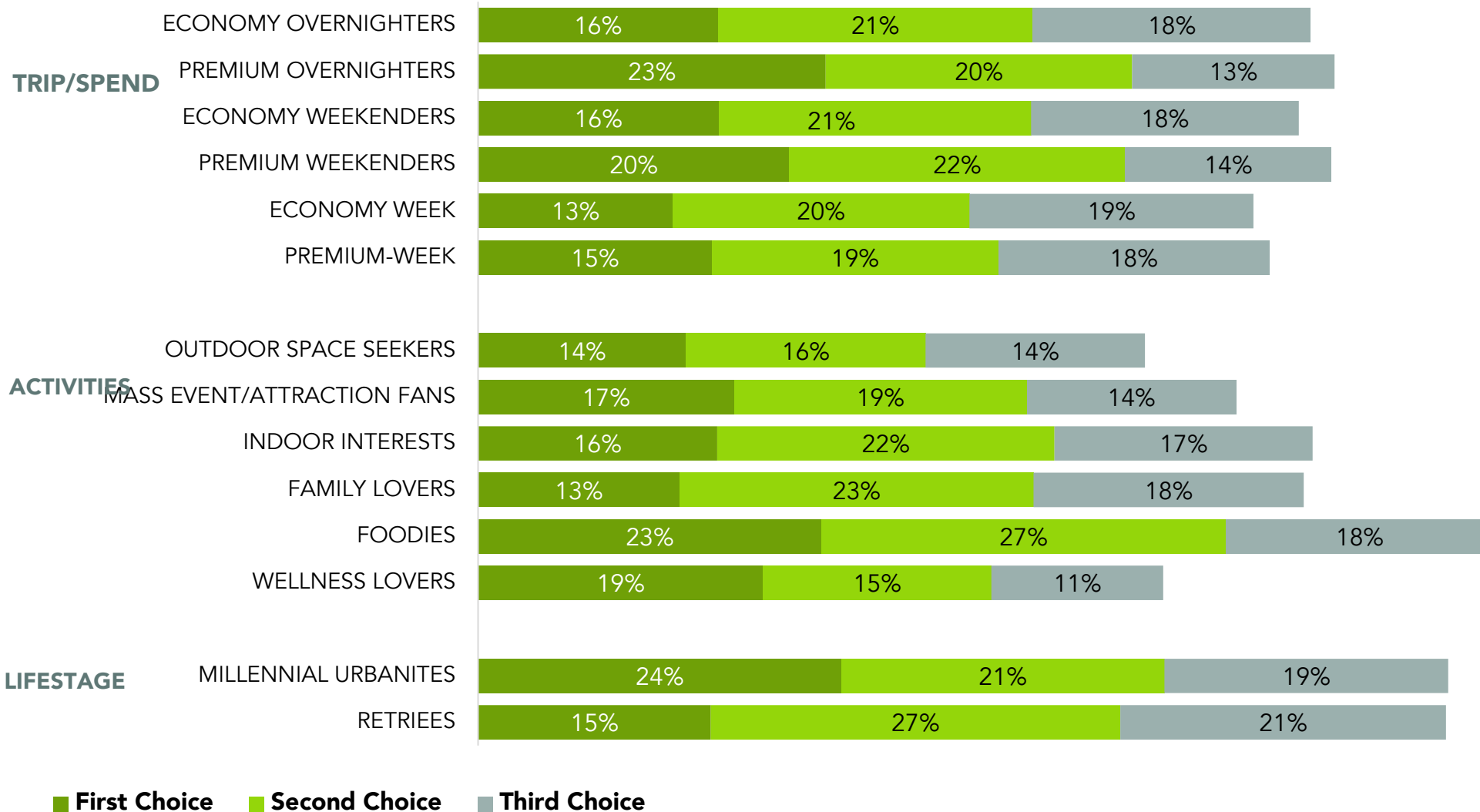
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FOOD AND DRINK



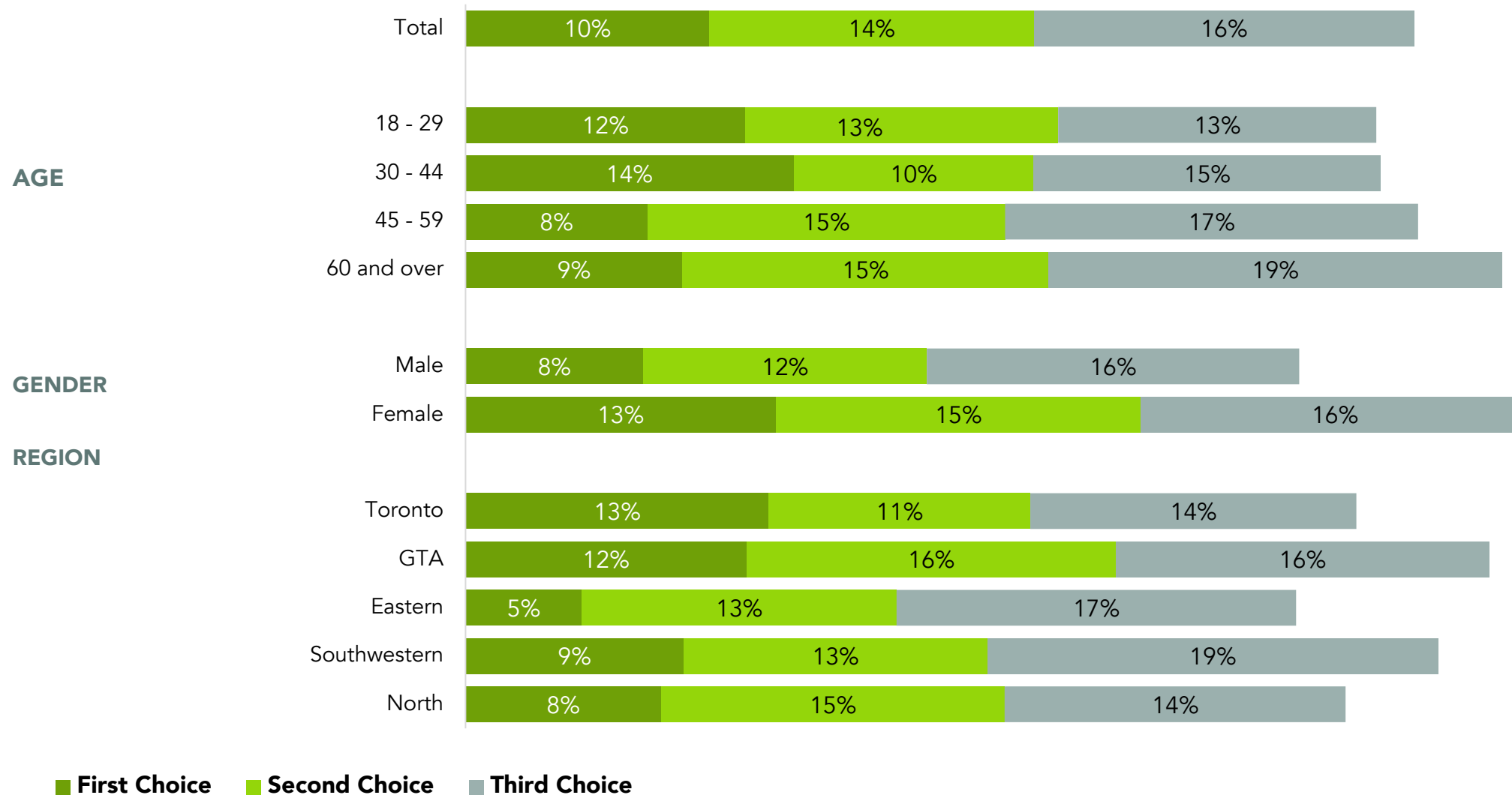
Food & drink: Imagine that travel restrictions are lifted soon and public officials say it is safe to travel, but there is no vaccine yet for COVID-19 . What are you most looking forward to... Please rank the top three things you are most looking forward.

FOOD AND DRINK



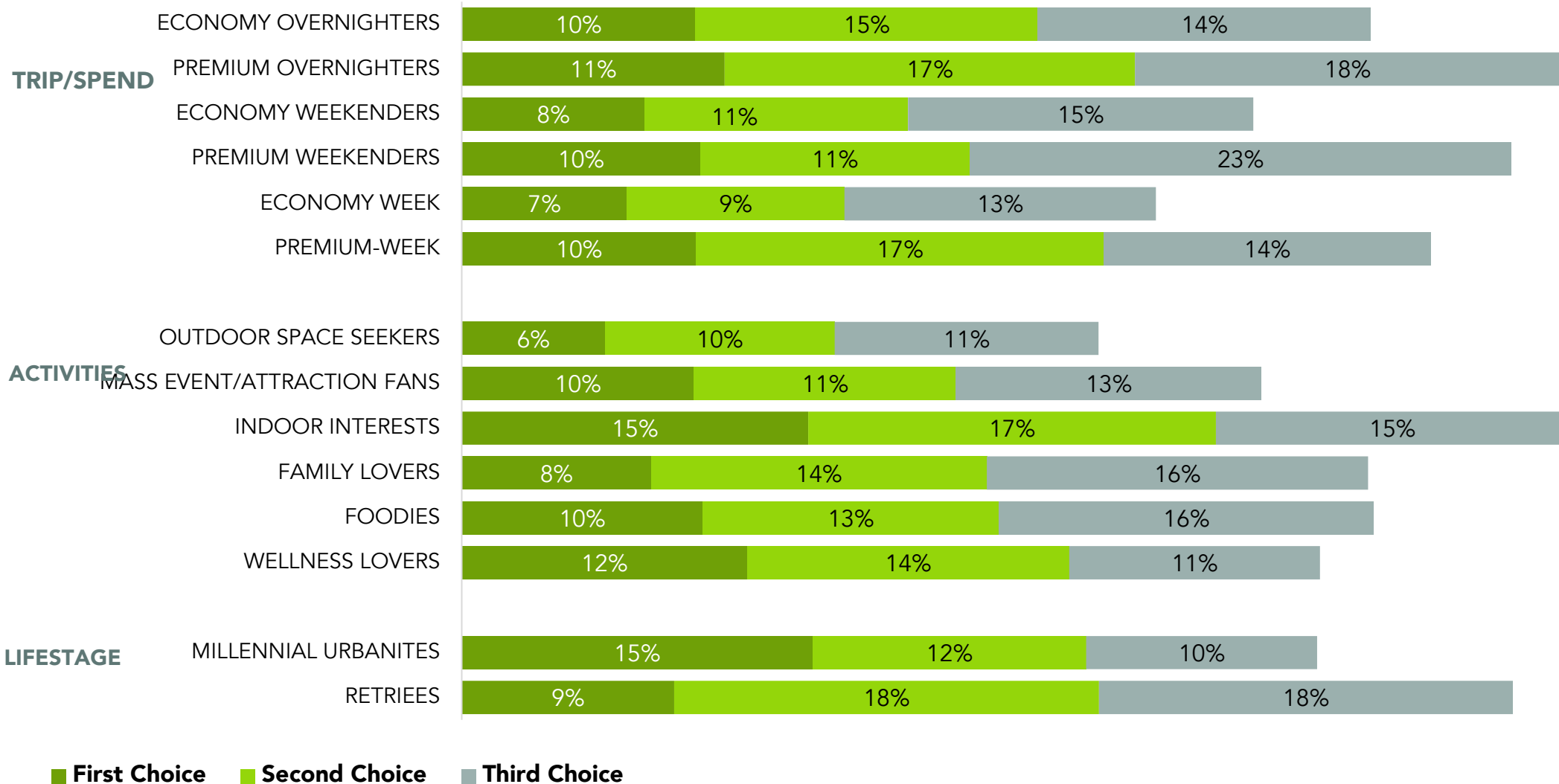
Food & drink: Imagine that travel restrictions are lifted soon and public officials say it is safe to travel, but there is no vaccine yet for COVID-19 . What are you most looking forward to... Please rank the top three things you are most looking forward.

SHOPPING



Shopping: Imagine that travel restrictions are lifted soon and public officials say it is safe to travel, but there is no vaccine yet for COVID-19 . What are you most looking forward to... Please rank the top three things you are most looking forward.

SHOPPING



Shopping: Imagine that travel restrictions are lifted soon and public officials say it is safe to travel, but there is no vaccine yet for COVID-19 . What are you most looking forward to... Please rank the top three things you are most looking forward.