GROWING FEARS OF COVID LIKELY TO KEEP MANY TRAVELLERS AWAY, BUT NOT ALL

ONTARIO TRAVEL A LIKELY OPTION, BUT FACING GREATER COMPETITION WITH BUDGET/HOME SPEND

COVID SPECIFIC MEASURES ARE MORE IMPORTANT THAN EVER

ABACUS DATA

COVID-19 & TRAVEL IMPACT STUDY
WAVE 2

FINAL RESULTS
SURVEY OF ONTARIO RESIDENTS

METHODOLOGY

The survey was conducted with 2,000 residents deemed ‘travellers’ under the screening criteria aged 18 and older from November 9th to 21st 2020. 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 Ontario’s population according to age, gender, educational attainment, and region. Totals may not add up to 100 due to rounding.

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EXECUTIVE SUMMARY

EXECUTIVE SUMMARY

The unpredictability of our lives because of COVID-19 means that we are hesitant to be sure of our plans, and comfort levels with doing different activities day-to-day. This includes how Ontarians are feeling about travel. Things like case count, the narrative in the media, and how ‘close-to-home’ the virus seems all impact how comfortable we are with leaving the house for anything other than work or school.

A small number of us are okay with this unpredictability. And have accepted it as a trade-off to trying to live their lives as normally as possible. But for most of us, this unpredictability means that we are unsure of what to do, and what we would consider safe or unsafe. We might recognize that adjustments need to be made if we want to go out and have experiences (yet still uncomfortable), or we might shut it all off and instead try to accept that we can’t have it both ways; that we must sacrifice things like travel for the time being and focus on things.

At the same time, we are doing our best to uphold the recommendations and stay on top of the latest do’s and don’t’s but we are getting tired. The number of rules and protocols that to keep up with just for making the occasional trip to the grocery store are changing frequently, and it takes a lot to keep up.

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EXECUTIVE SUMMARY

If we want to take a trip somewhere, it would mean figuring out what zone the destination is in, what rules apply to that zone, and then searching for activities/accommodations that we think fit with our interpretation of the rules. That's a lot more work than just picking a place that we would find relaxing or enjoyable. Not to mention that in the time between now and our trip, the rules could change and that would mean investing more time and energy into making sure the trip can still be possible.

These two additions create more obstacles for people looking to book trips; things are so uncertain and it is hard to know where to turn. Travellers need to be reassured about how your accommodation/activity work within the confines of this unpredictability. And this information needs to be easy to find, to help eliminate that burden of additional research as much as possible.

Few have decided with certainty that they will be travelling in this upcoming season. But for those who are on the fence, an extra bit of information on the COVID-19 protocols and reassurances in an easy-to-find place may be just the nudge they need to get back in

WHAT'S CHANGED SINCE SUMMER 2020?

Worries about the pandemic are here to stay.

And instead of decreasing, we see an increase in concern about COVID-19 overall, additional spikes in infections, and a lack of medical equipment. Living in a pandemic for 8 months doesn't seem to have made us any more comfortable with the situation we are in.

Some are less concerned about travel, budget and health concerns compared to the summer, but for the majority, they say their concerns are greater for this upcoming season.

46% Less comfortable travelling in the winter overall

50% More concerned about the health implications in the winter

36% More concerned about the budget in the winter

30% Less comfortable travelling in the summer overall

22% More concerned about the health implications in the winter

22% More concerned about the budget in the winter

Staying away from people has grown in importance, as has people's interest in picking destinations that were already on their radar.

85% I will prefer to stay away from a lot of people
+5

73% I will choose destinations I was already planning to travel to
+4

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WHAT'S REMAINED THE SAME?

Minimizing contact with others and adhering to COVID-19 recommendations and enhanced cleaning measures remain key.

85% +1 The cleanliness of accommodations/attractions is more important to me than before

89% +4 Being able to observe social distancing protocols at the destination is important to me.

88% +4 I want to see clear communications about how the accommodation/ attraction is adhering to COVID-19 policies

Outdoor activities are still more popular than indoor activities. And among activities that take place indoors, its all about being able to keep your distance and stay away from others.

41% Completely/mostly comfortable snowshoeing, cross-country skiing or hiking.

40% Completely/mostly comfortable enjoying food & drink.

23% Completely/mostly comfortable enjoying museums and galleries.

16% Completely/mostly comfortable enjoying live shows (theatres, concerts).

Above all else, the mindset towards travel hasn't shifted.

8% I'll jump right back in +2

49% I'll get back in but carefully +3

44% I'll test the waters first -4

+/- compared to Wave 1

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WHAT ELSE DO WE KNOW ABOUT THE TRAVEL MENTALITY?

There isn't a wide-spread feeling of 'getting comfortable' with the pandemic.

But not everyone has the same comfort level.

TRAVEL READY

"If I want to travel anytime soon, I'm going to have to get used to travelling during a pandemic, and I'm comfortable navigating this new travel reality"

15%

Case count is less of an issue for this group. They seem to accept that waves of cases are the norm for now, and have decided that's something they can handle. Even though they are ready, this group will still need to be convinced that the reasons they travelled pre-pandemic are still possible (even if it means a few changes).

NEEDS ENCOURAGEMENT

If I want to travel anytime soon, I'm going to have to get used to travelling during a pandemic, but I'm not very comfortable navigating this new travel reality"

28%

Finding things to do is less of an issue is less of an issue for this group. Instead, the overall COVID-19 situation (case counts, etc.) are a bigger influence. It doesn't mean that this group won't book. Instead, they need to be reassured of the measures in pace for their safety.

TRAVEL ADVERSE

I don't see myself travelling during the pandemic for the foreseeable future "

57%

This group is much more concerned about COVID-19 and very sensitive to a wave in cases.
The travel behaviour of this group will be directly tied to case count. The good news is that means when cases decrease, this group is likely to travel. But when cases are high, not much can be done to change their minds.

WHAT ELSE DO WE KNOW ABOUT THE TRAVEL MENTALITY?

There does seem to be a bit of pent up demand for travel.

This includes 4 in 10 who say they want to take at least one trip before the year is over.

88%
Strongly /somewhat agree
I didn't travel as much as I usually do this past summer/fall

55%
Strongly /somewhat agree
I have more vacation days than usual to use before year-end

41%
Strongly /somewhat agree
I'd like to take at least one trip somewhere before year end

But there is also a strong interest in diverting funds elsewhere. Interest in spending on home renovation/things to do at home is growing and will create more competition for travel budgets.

79%
Strongly /somewhat agree
For the next 6 months, I would prefer to use any of the money I normally set aside for travel, for other things I can use/do at home

And with 36% more concerned about their budgets this winter compared to the summer, the pool of funds available for travel is likely smaller too.

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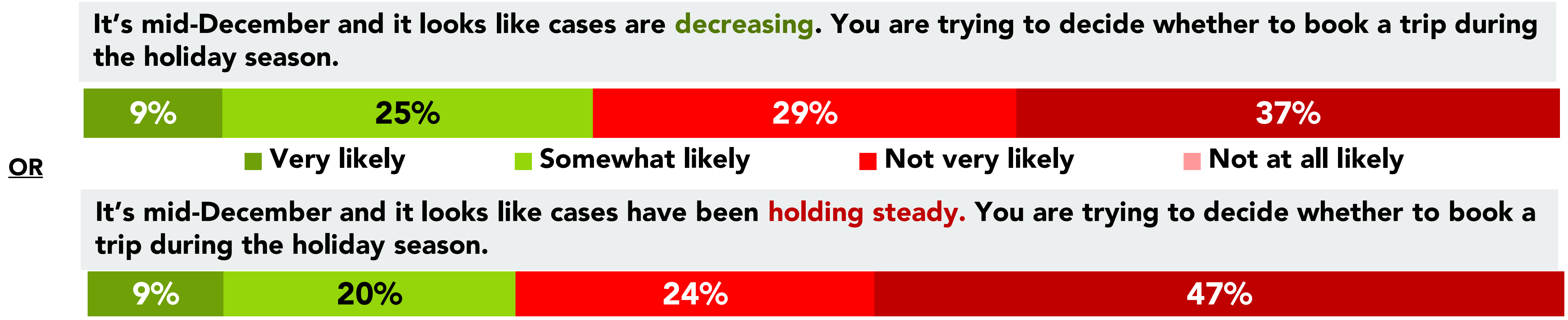
HOW DO TRAVELERS FEEL ABOUT WINTER 2020/2021 TRAVEL?

One in three (36%) are comfortable travelling between now and March 2021.

This includes:

- **18-29 (47%) vs 23% (60+)**
- **Parents (42%)**
- **Outdoor Space Seekers (57%)**
- **Wellness Lovers (52%**
- **Those who are 'travel ready' (78%) vs those who 'need encouragement (55%), and the 'travel adverse' (15%)**

While on the surface, case count does seem to be a deciding factor, it's more likely to change the minds of those who are already hesitant rather than all travellers.



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WHAT CAN OPERATORS DO?

Like the summer, unfortunately much of what's impacting travel decisions and behaviour is out of the control of operators. Things like case count, overall handling of the pandemic (hospital resources, and public health protocol) all shift behaviour and decision-making, but these cannot be avoided.

And while public health recommendations shift often, there are a few things that have held constant.

- **Travellers want to see: increased cleaning measures, and how they can keep their distance from others.**
- **A sense of familiarity is key. Pandemic fatigue is a reality for many. Booking a vacation shouldn't add more stress, and time spent researching whether the trip can be considered 'COVID-safe'. And so, travellers are most likely to turn to what they already know.**

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WHAT CAN OPERATORS DO?

SHOW ADHERENCE TO COVID-19 PROTOCOLS AND PROCEDURES.

Adherence to COVID-19 protocols (and showing you are doing so) is still paramount for travellers. Showing that you are doing all that you can will give travellers one less thing to worry about.

66% The ability to see clear communications on adherence to protocol is critical/important.

And aside from showing how you will be doing your part, travellers want operators to show how travellers can easily follow public health recommendations. Things like activities and accommodations that allow travellers to easily interact with their bubble only, and multi-use spaces, contactless check-in etc.

Remember that half of those who are travel ready say that it's going to be difficult to find things to do. This is likely their biggest deterrent to actually making a booking, so work to eliminate this barrier too.

CONTINUE TO ENGAGE WITH PAST CUSTOMER BASE.

Aside from COVID protocols, familiarity is still the most important travel factor right now. Travelers are even more likely to pick places they have already been, or already know about.

Even if you can't offer travel to your base right now, still look for ways to engage your customer base.

75% Finding ways to continue to support the local businesses in the area I usually travel to is important to me during this time.

MAKE IT EASIER TO DECIDE TO TRAVEL, ANY WAY YOU CAN.

56% say they are likely to use financial support provided by the provincial government for travel.
Among those who say they are comfortable travelling in Ontario sometime before March, this increased to **71%**.

With financial strain growing, this credit will be very helpful. Work with your local RTO's to advocate for your services to be included in some way.

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TRAVELER PROFILES

ABACUS DATA

PROFILES

TRIP/SPEND PROFILES *ONTARIO ONLY

	AVERAGE TRIP SPEND (PRE-COVID)	TOOK THIS KIND OF TRIP IN LAST WINTER TO AN ONTARIO DESTINATION	% OF SAMPLE
ECONOMY OVERNIGHTERS	UNDER $4K	DAY OR OVERNIGHT TRIP	40%
PREMIUM OVERNIGHTERS	OVER $4K	DAY OR OVERNIGHT TRIP	11%
ECONOMY WEEKENDERS	UNDER $4K	WEEKEND TRIP	29%
PREMIUM WEEKENDERS	OVER $4K	WEEKEND TRIP	9%
ECONOMY WEEK+	UNDER $4K	WEEK LONG + TRIP	8%
PREMIUM WEEK+	OVER $4K	WEEK LONG + TRIP	4%

LIFESTAGE PROFILES *ONTARIO ONLY

<table>
<tr><th></th><th></th><th></th><th>% OF SAMPLE</th></tr>
<tr><td>YOUNG URBANITES</td><td>18-29 YEARS OLD</td><td>LIVE IN TORONTO (NOT GTA) OR URBAN OTTAWA</td><td>8%</td></tr>
<tr><td>RETIREES</td><td colspan="2">RETIRED</td><td>15%</td></tr>
<tr><td>PARENTS</td><td colspan="2">HAVE CHILDREN UNDER 18 AT HOME</td><td>27%</td></tr>
<tr><td>SNOWBIRDS</td><td colspan="2">RETIRED, AND SPEND A MONTH+ IN SUNNY DESTINATIONS</td><td>2%</td></tr>
</table>

PROFILES

ACTIVITY PROFILES *ONTARIO ONLY

	LOVE TO DO AT LEAST ONE OF THE FOLLOWING WHEN THEY TRAVEL	% OF SAMPLE
OUTDOOR SPACE SEEKERS	SKATING, DOWNHILL-SKIING OR SNOWBOARDING, WINTER TOURING (SNOWMOBILES, ETC.), SNOWSHOEING, CROSS-COUNTRY SKIING OR WINTER HIKING	22%
MASS EVENT/ATTRACTION FANS	FESTIVALS/CULTURAL EVENTS, ATTRACTIONS AND LANDMARKS, LIVE SHOWS (THEATRE, CONCERTS), SPORTING EVENTS	50%
INDOOR INTERESTS	SHOPPING MUSEUMS/ART GALLERIES	37%
FAMILY LOVERS	VISIT WITH FAMILY/FRIENDS AT THE DESTINATION YOU ARE VISITING	42%
FOODIES	FOOD & DRINK	46%
WELLNESS LOVERS	WELLNESS EXPERIENCES (E.G. SPA, YOGA)	12%

COVID-19 PROFILES *ONTARIO ONLY

		% OF SAMPLE
TRAVEL READY	"IF I WANT TO TRAVEL ANYTIME SOON, I'M GOING TO HAVE TO GET USED TO TRAVELLING DURING A PANDEMIC AND I'M COMFORTABLE NAVIGATING THIS NEW TRAVEL REALITY"	15%
NEED ENCOURAGEMENT	"IF I WANT TO TRAVEL ANYTIME SOON, I'M GOING TO HAVE TO GET USED TO TRAVELLING DURING A PANDEMIC BUT I'M NOT VERY COMFORTABLE NAVIGATING THIS NEW TRAVEL REALITY"	28%
TRAVEL ADVERSE	"I DON'T SEE MYSELF TRAVELLING DURING THE PANDEMIC FOR THE FORESEEABLE FUTURE"	57%

OVERALL PERCEPTIONS OF THE COVID-19 PANDEMIC

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OVERALL PERCEPTIONS OF THE COVID-19 PANDEMIC

- **Most travellers remain worried about the pandemic: 62% are worried about the pandemic- a ten-point increase since the last wave.**
  - Those in the GTA and Toronto (where case counts are currently the highest) express the highest level of concern.
  - Older Ontarians and retirees are more concerned than their younger counterparts.
  - And while there is little difference in concern among activity profiles, premium travellers are more worried than economy travellers.
- **57% say they are worried about COVID-19 affecting their ability to travel-consistent with the summer.**
  - Premium travellers (44% premium overnighters are really worried) and Snowbirds (45% are really worried) are most concerned about the pandemic impact on travel.
  - Fears about an additional spike in infections, contracting COVID-19, and a lack of medical equipment have also risen, while other aspects remain steady.

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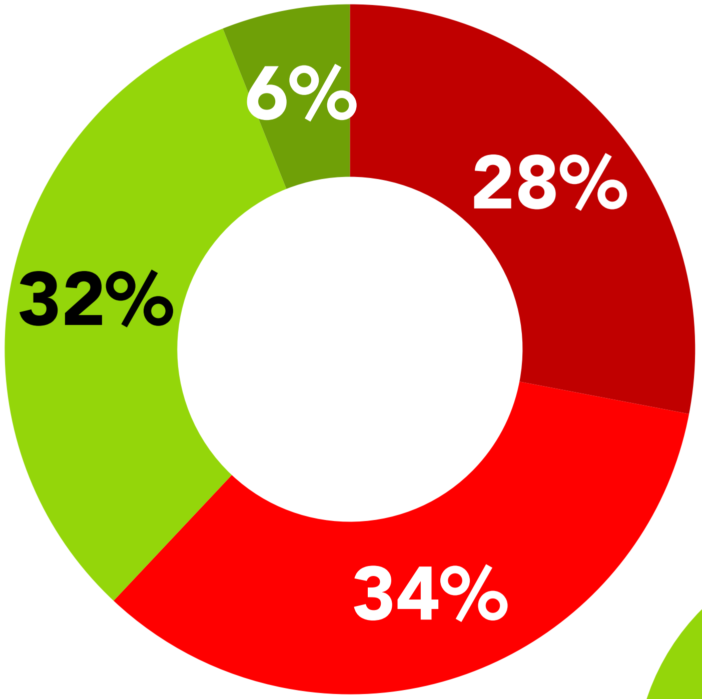
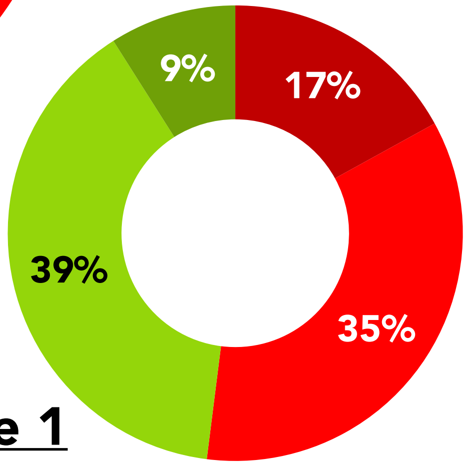
TWO THIRDS ARE WORRIED ABOUT THE PANDEMIC



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

62% **of travellers say coronavirus is making them worried. A ten-point increase from last wave.**



Wave 1

Those in Toronto/GTA are most concerned, as are women and older Ontarians. Premium travellers are more concerned than economy travellers, and as expected, those who are travel adverse are much more concerned than those who are travel ready.

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

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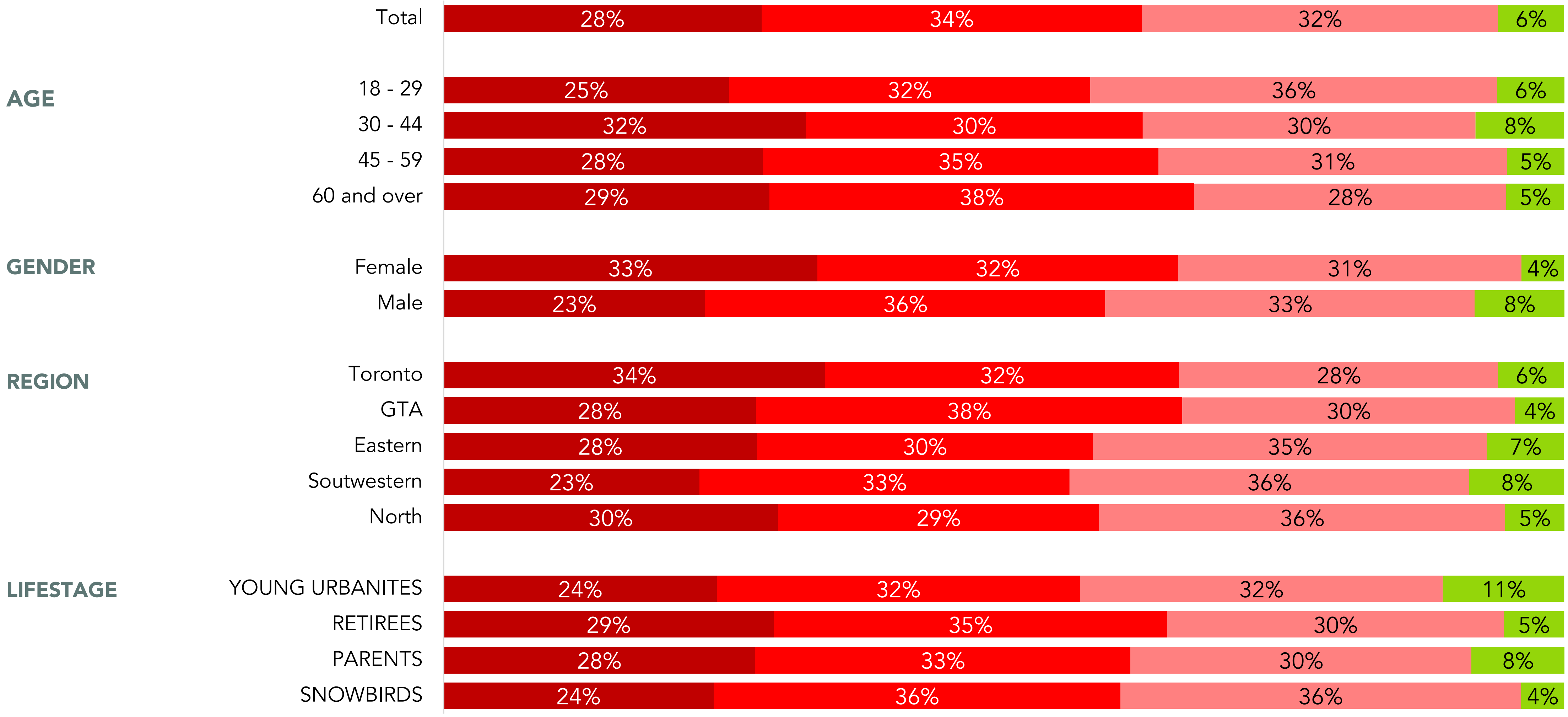
WORRY ABOUT CORONAVIRUS OUTBREAK

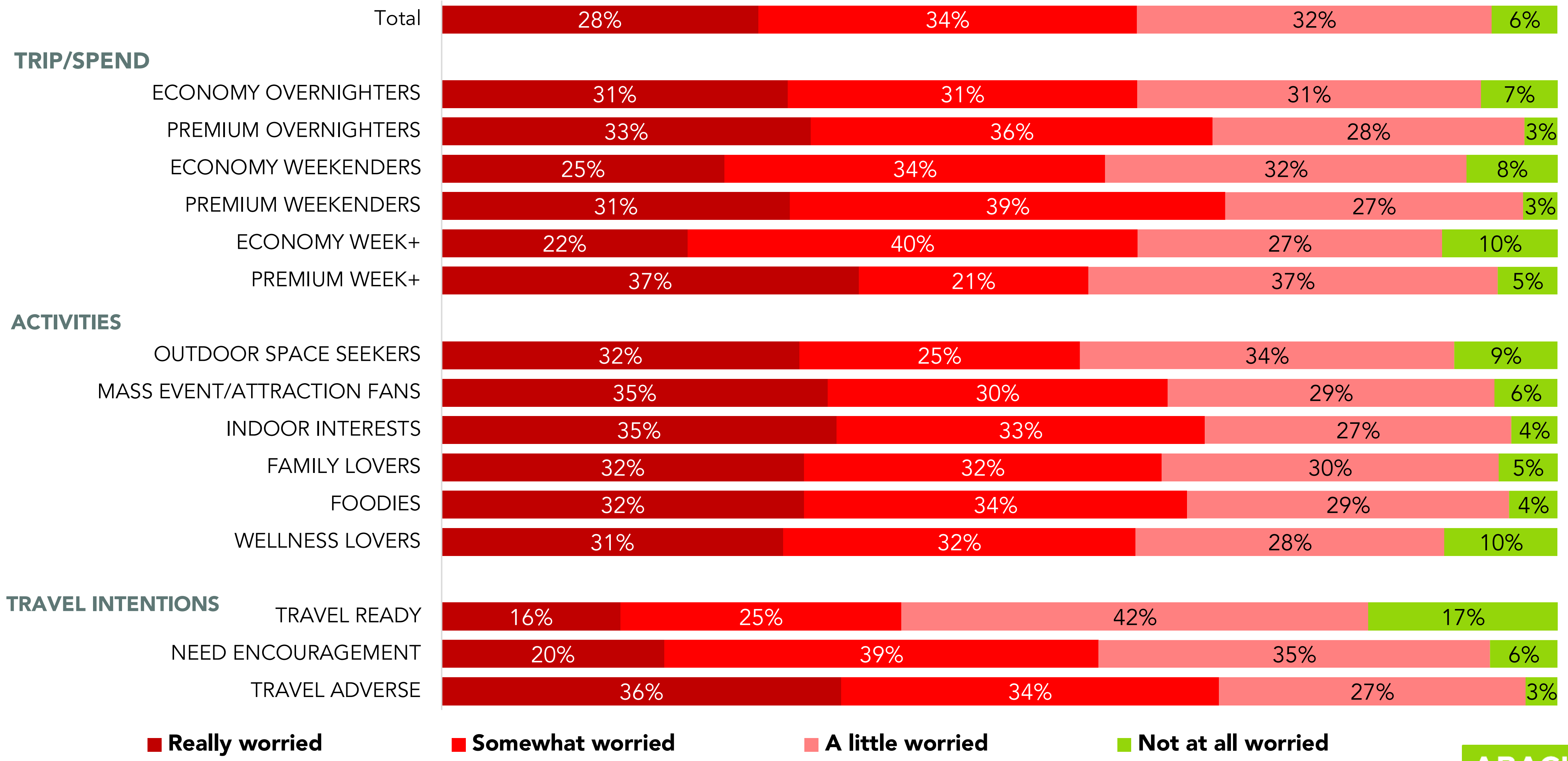


	Really worried	Somewhat worried	A little worried	Not at all worried
Total	28%	34%	32%	6%
AGE 18 - 29	25%	32%	36%	6%
30 - 44	32%	30%	30%	8%
45 - 59	28%	35%	31%	5%
60 and over	29%	38%	28%	5%
GENDER Female	33%	32%	31%	4%
Male	23%	36%	33%	8%
REGION Toronto	34%	32%	28%	6%
GTA	28%	38%	30%	4%
Eastern	28%	30%	35%	7%
Soutwestern	23%	33%	36%	8%
North	30%	29%	36%	5%
LIFESTAGE YOUNG URBANITES	24%	32%	32%	11%
RETIREES	29%	35%	30%	5%
PARENTS	28%	33%	30%	8%
SNOWBIRDS	24%	36%	36%	4%

ABACUS DATA

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

WORRY ABOUT CORONAVIRUS OUTBREAK



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

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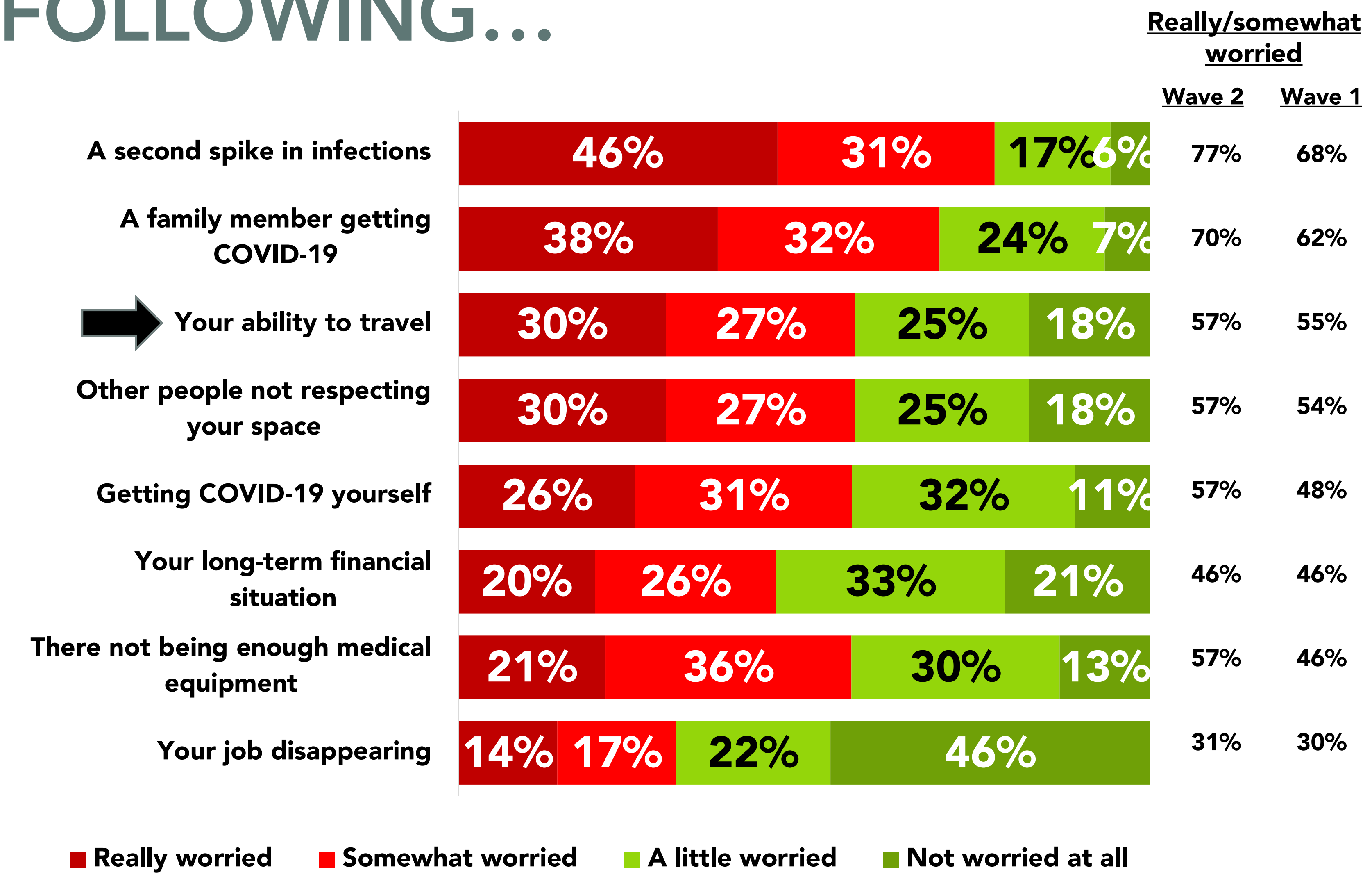
TO WHAT EXTENT ARE YOU WORRIED ABOUT THE FOLLOWING…



Just over half remain worried about the pandemic's impact on their ability to travel.

Fears about an additional spike in infections, contracting COVID-19, and a lack of medical equipment have also risen, while other aspects remain steady.

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

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THE TRAVEL MINDSET TODAY

ABACUS DATA

THE TRAVEL MINDSET TODAY

- Still, few are eager to jump right back in to travel. Only 8% are ready to jump right back in.
- As time has gone on and the seasons changed, overall comfort, health concerns and budget concerns have grown since the summer.
  - Overall comfort levels have declined for those who are higher risk (older), or typically enjoyed 'high-risk activities' (indoors, crowds). With no vaccine and an increased spread of cases, it makes sense that these individuals are least comfortable.
- 8 months in, we are also starting to understand some general why mindsets about travel continue to remain stagnant.
  - First, there is a divide on what it means to travel in a pandemic. 15% have more or less accepted this premise. 28% can accept it, but it doesn't mean they are comfortable about it. And 57% have just ruled out travelling in a pandemic.
  - Next, there is frustration about finding things to do. What's the point of travelling if we can't do the activities and stay at the places we love? One in five (19%) say that this hasn't been a problem for them. Of the remaining travellers, half say there are challenges but it's because of the winter season, while the other half say that finding things to do is just challenging in a pandemic.
  - Given that we have lived through two waves of cases so far, we can also get a sense of how this affects travel plans. Only 8% would be comfortable booking and travelling during a surge, 20% would book but not travel in a surge. And 72% would do neither during an increased wave of cases.

THE TRAVEL MINDSET TODAY

- **From this, we have created 3 'travel intentions' segments:**

PHILOSOPHY ABOUT TRAVELLING DURING COVID-19	*% OF TRAVEL POPULATION*	
TRAVEL READY "If I want to travel anytime soon, I'm going to have to get used to travelling during a pandemic, and I'm comfortable navigating this new travel reality "	15%	They seem to accept that waves of cases are the norm for now, and have decided that's something they can handle. Even though they are ready, this group will still need to be convinced that the reasons they travelled pre-pandemic, are still possible (even if it means a few changes).
NEEDS ENCOURAGEMENT "If I want to travel anytime soon, I'm going to have to get used to travelling during a pandemic, but I'm not very comfortable navigating this new travel reality "	45%	Finding things to do is less of an issue is less of an issue for this group. Instead, the overall COVID-19 situation (case counts, etc.) are a bigger influence. they need to be reassured of the measures in pace for their safety.
TRAVEL ADVERSE "I don't see myself travelling during the pandemic for the foreseeable future "	61%	The travel behaviour of this group will be directly tied to case count. The good news is that means when cases decrease, this group is likely to travel. But when cases are high, not much can be done to change their minds.

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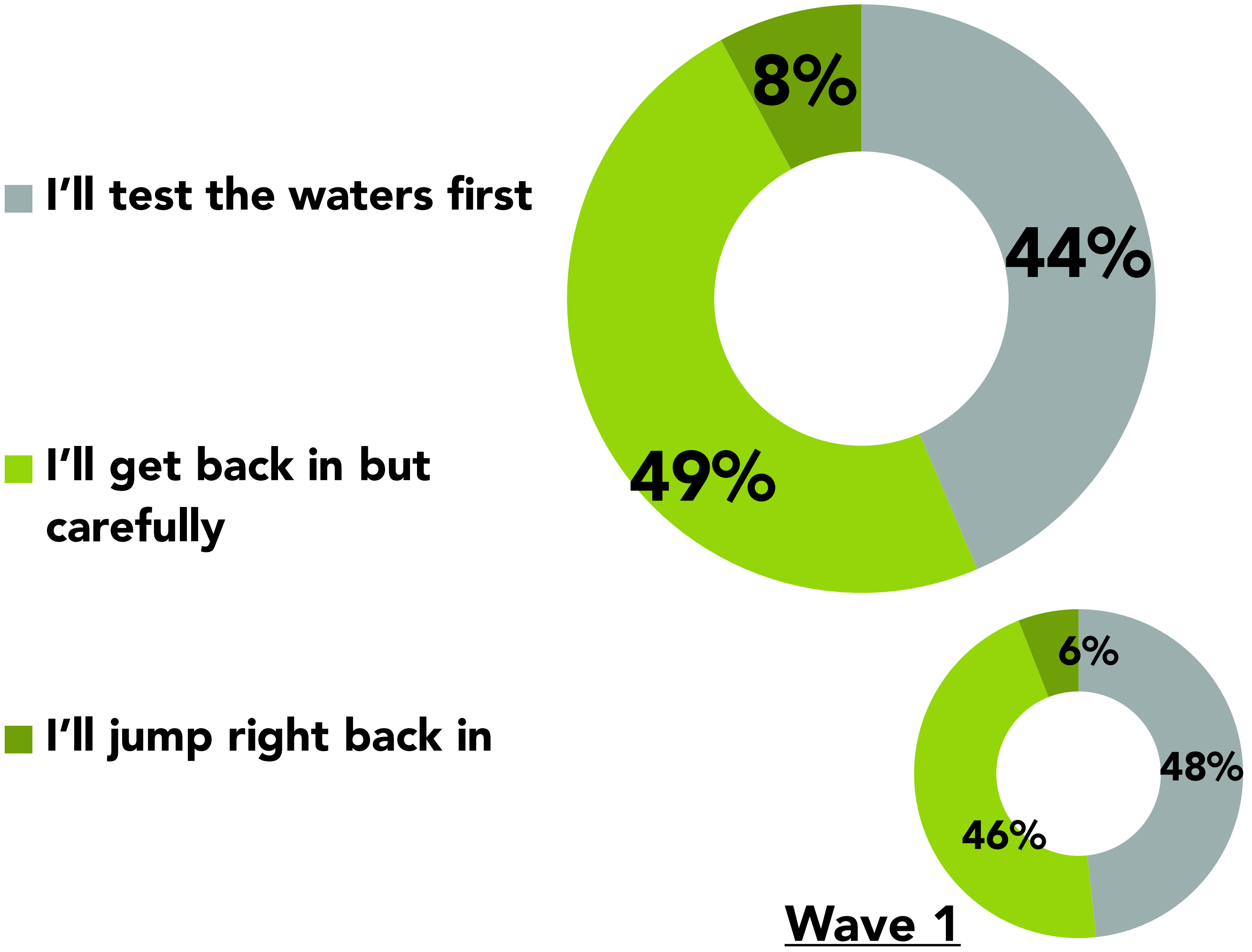
STILL, FEW ARE EAGER TO JUMP RIGHT BACK IN



Few Ontario travellers are eager to get back into their travel habits. Only 8% are likely to resume their pre-COVID travel habits ASAP.

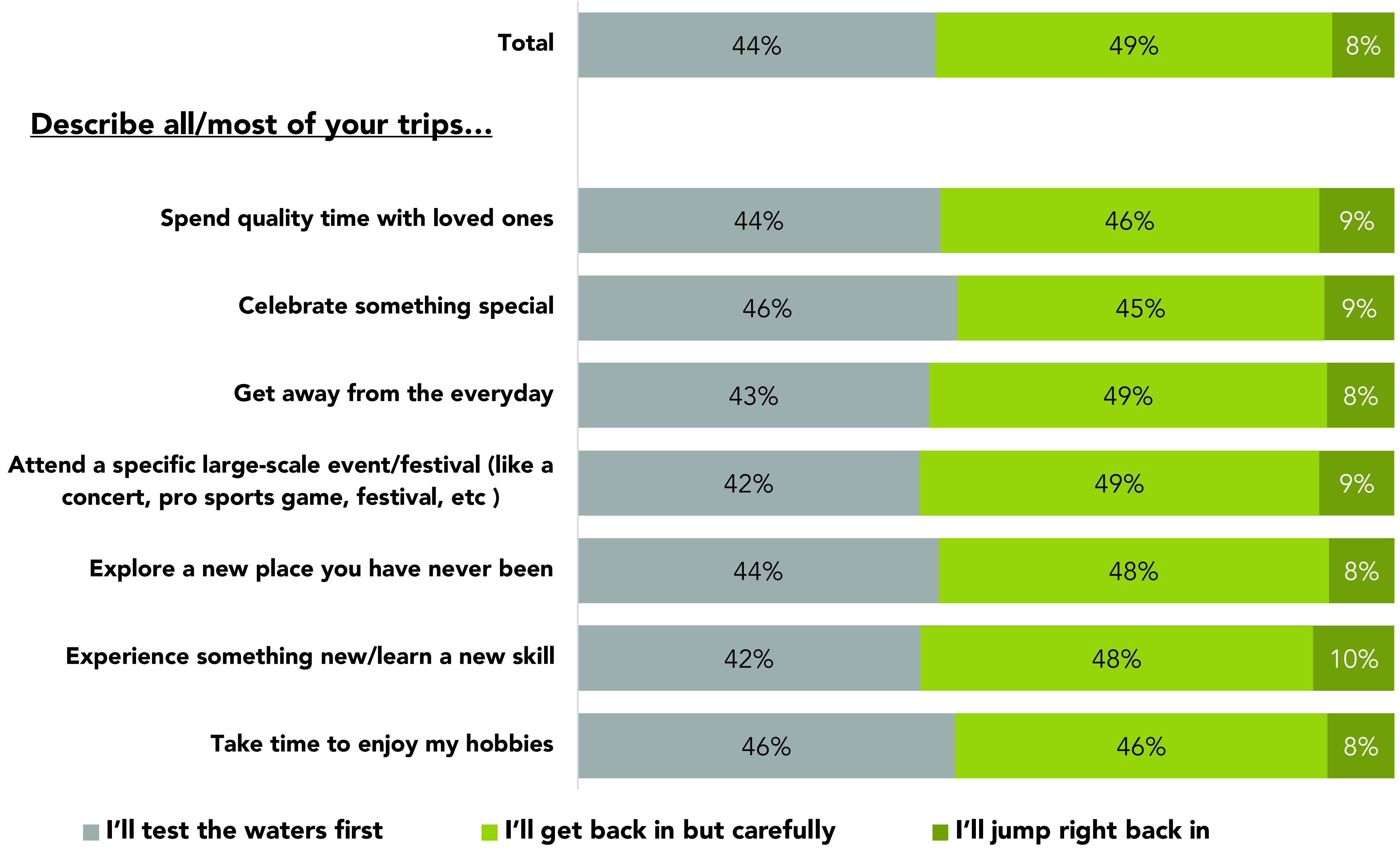
Most hesitant?

- **Retirees (46% I'll test the waters first)**
- **Premium weekend/overnight travellers**
- **Travel adverse (56% I'll test the waters first)**

Interestingly snowbirds are much less hesitant than retirees overall.

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, travellers are hesitant to get right back into their travel habits.

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

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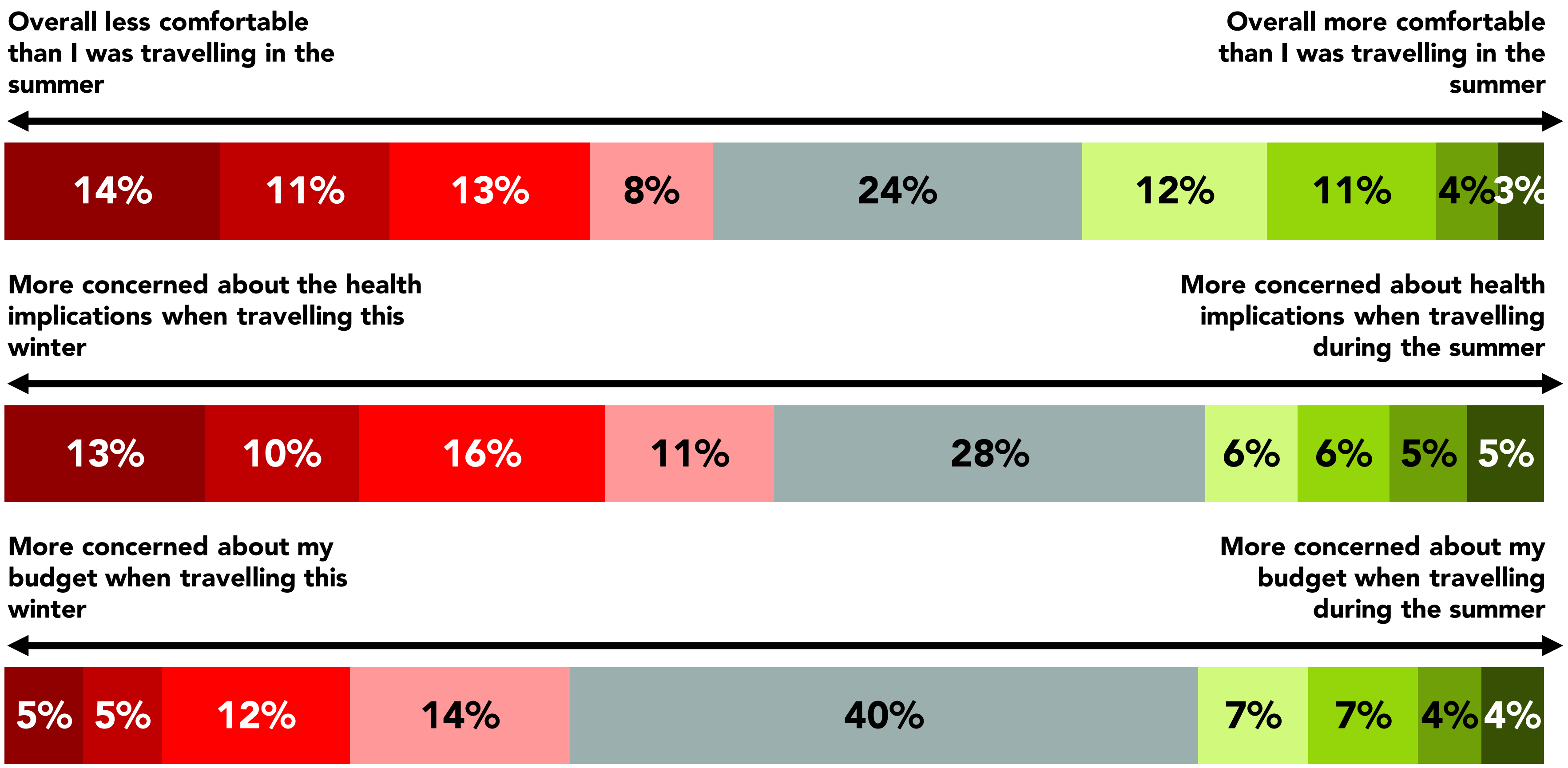
ONTARIO HAS MORE OR LESS ENTERED THE SECOND WAVE OF CASES IN THE COVID-19 PANDEMIC. COMPARED TO TRAVEL THIS SUMMER, WHICH OF THE FOLLOWING BEST EXPLAINS HOW YOU FEEL ABOUT TRAVEL IN ONTARIO DURING THE UPCOMING WINTER SEASON.



Comfort levels in general, concern about health implications and concerns about budget are heightened compared to this past summer.

Those who are at higher risk (older), and enjoy 'higher risk activities' (indoors, crowds) are less comfortable than they were in the summer.

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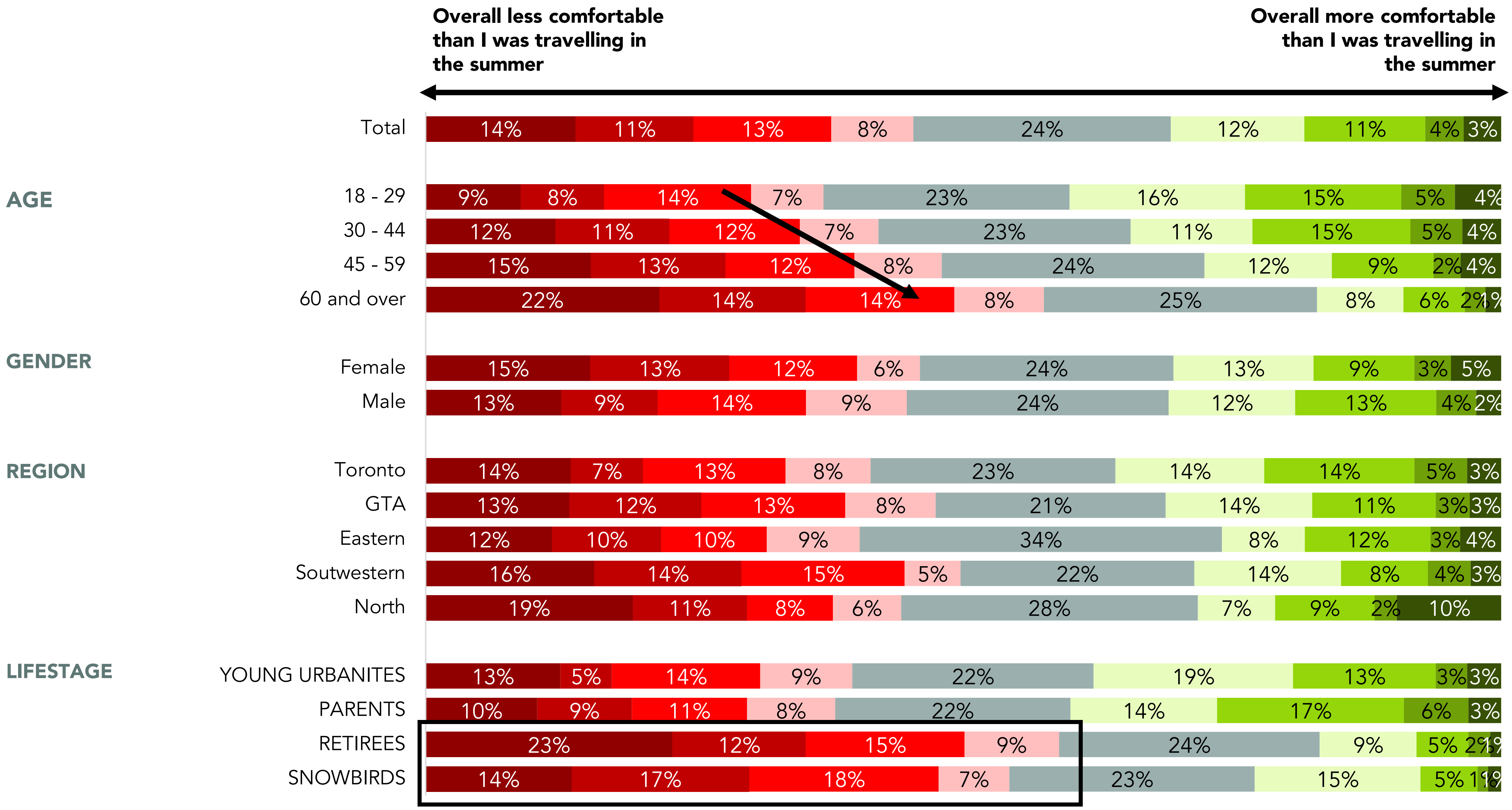
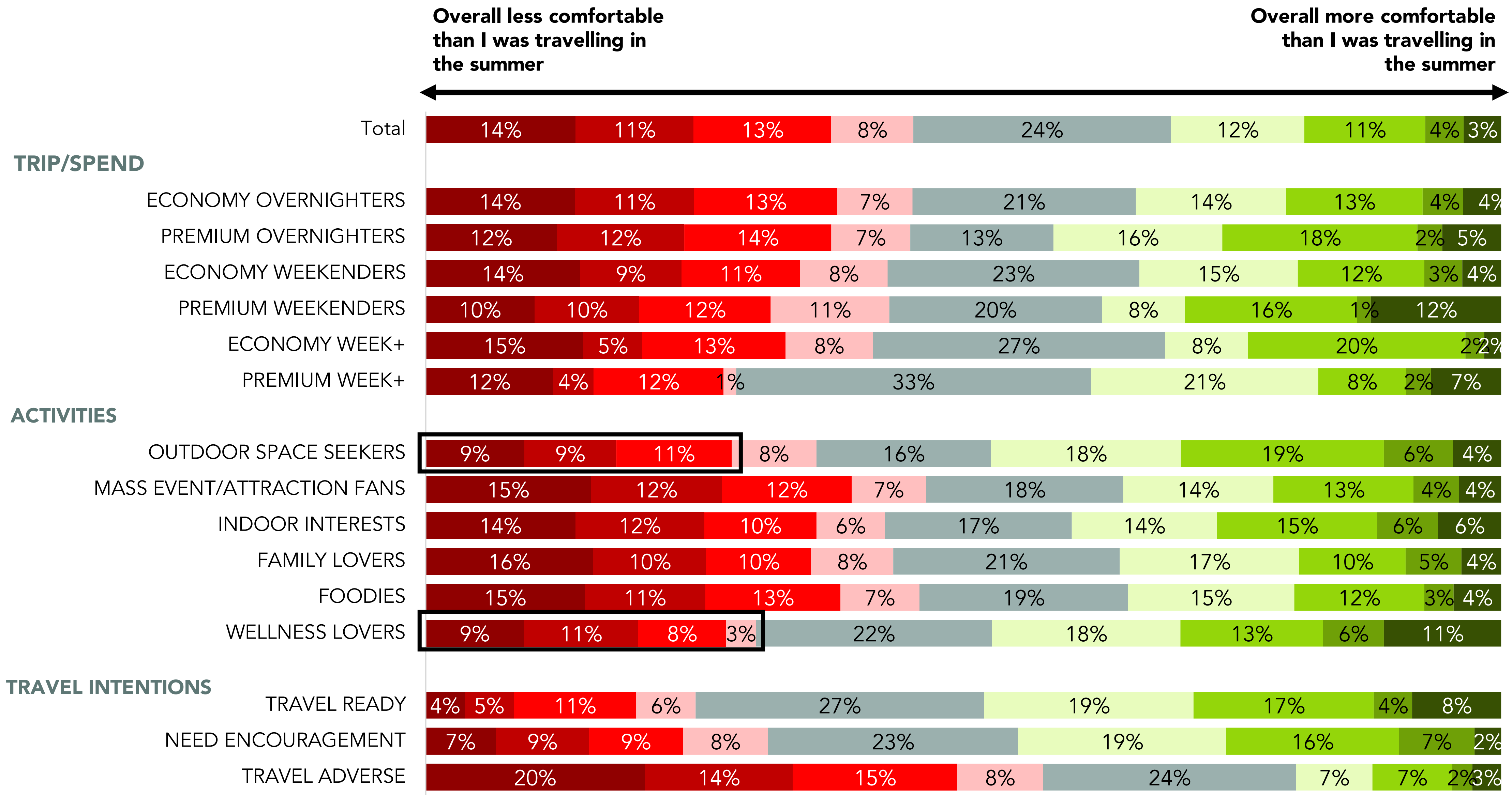


Ontario has more or less entered the second wave of cases in the COVID-19 pandemic. Compared to travel this summer, which of the following best explains how you feel about travel in Ontario during the upcoming winter season.



Ontario has more or less entered the second wave of cases in the COVID-19 pandemic. Compared to travel this summer, which of the following best explains how you feel about travel in Ontario during the upcoming winter season.

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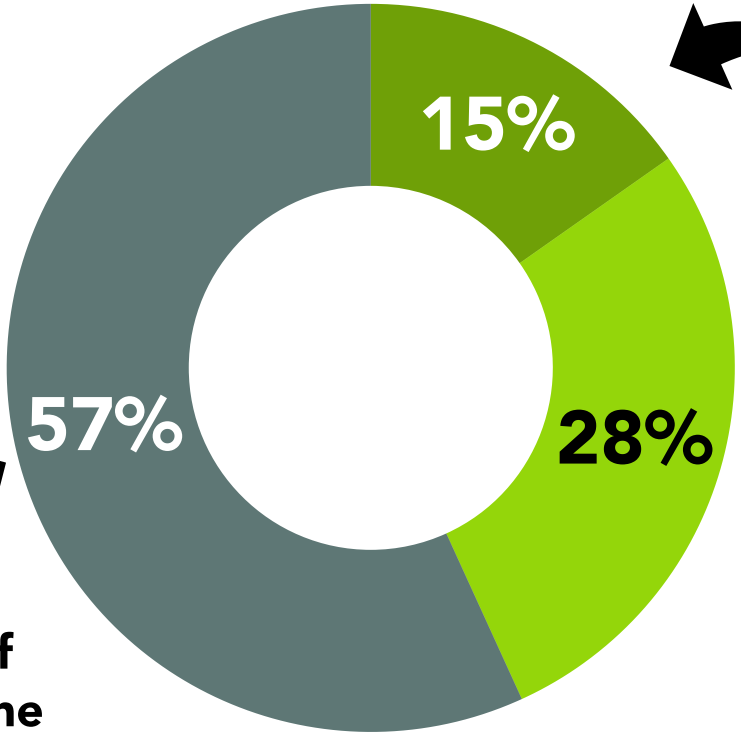
8 MONTHS IN, MOST HAVE NOT GROWN ACCUSTOMED TO THIS NEW TRAVEL REALITY



If I want to travel anytime soon, I'm going to have to get used to travelling during a pandemic, and I'm comfortable navigating this new travel reality

Only 15% say they are comfortable with what it means to travel during this time. Over half have counted out travel completely.

I don't see myself travelling during the pandemic for the foreseeable future

If I want to travel anytime soon, I'm going to have to get used to travelling during a pandemic, but I'm not very comfortable navigating this new travel reality

Which of the following do you agree with most?

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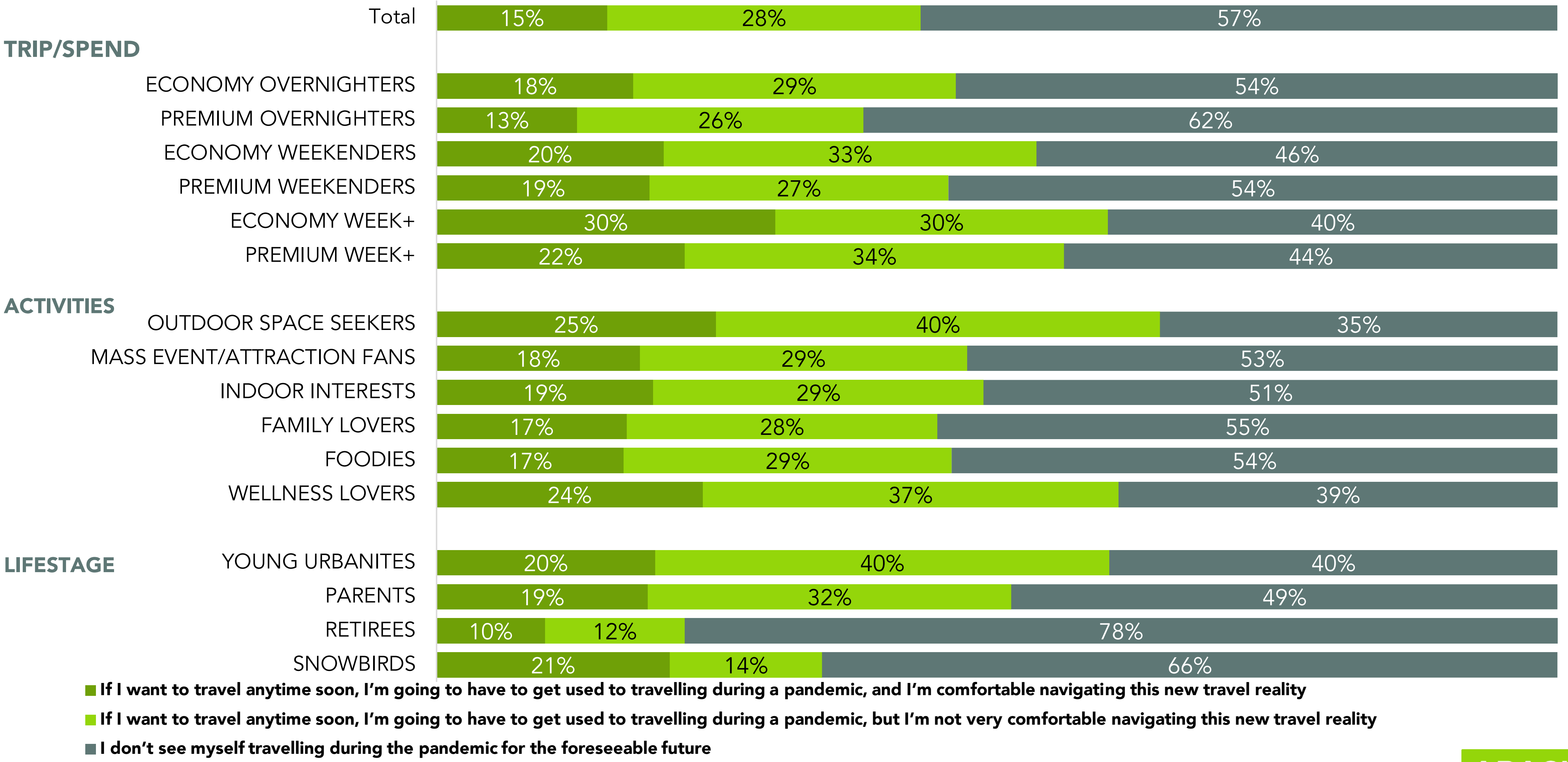
TRAVELLING IN THIS NEW REALITY



Which of the following do you agree with most?

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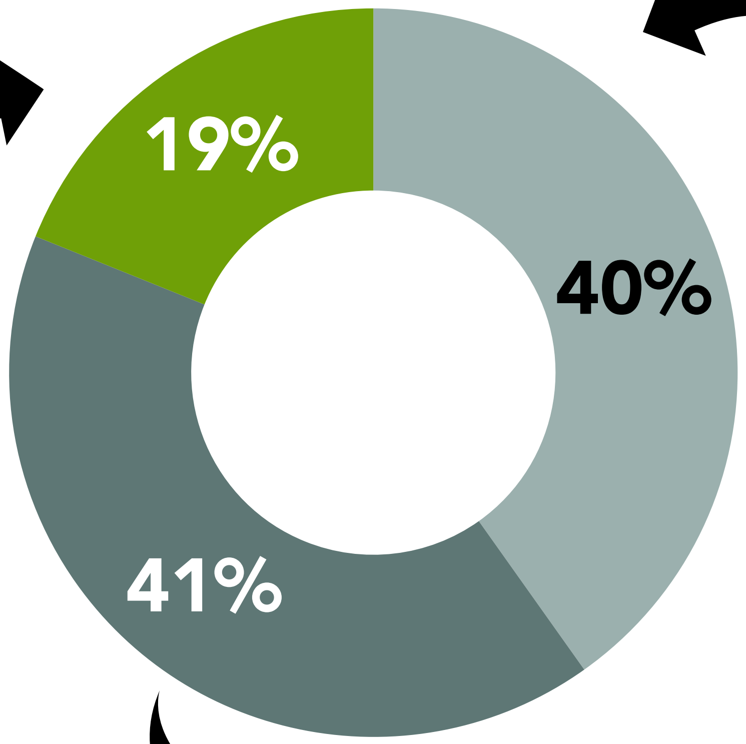
1 IN 5 ARE COMFORTABLE FINDING THINGS TO DO WITH AN ON-GOING PANDEMIC



I don't have too much difficulty finding places to stay and things to do that adhere to public health recommendations

It's going to be more challenging to find places to stay and things to do that adhere to public health recommendations in the winter

But for the most part, travellers are going to find the next season difficult. Of the remaining 80%, half say the winter season adds more challenges, while the other half say these challenges will exist whatever the season.

Regardless of the season, finding places to stay and things to do that adhere to public health recommendations is hard

Which of the following do you agree with most?

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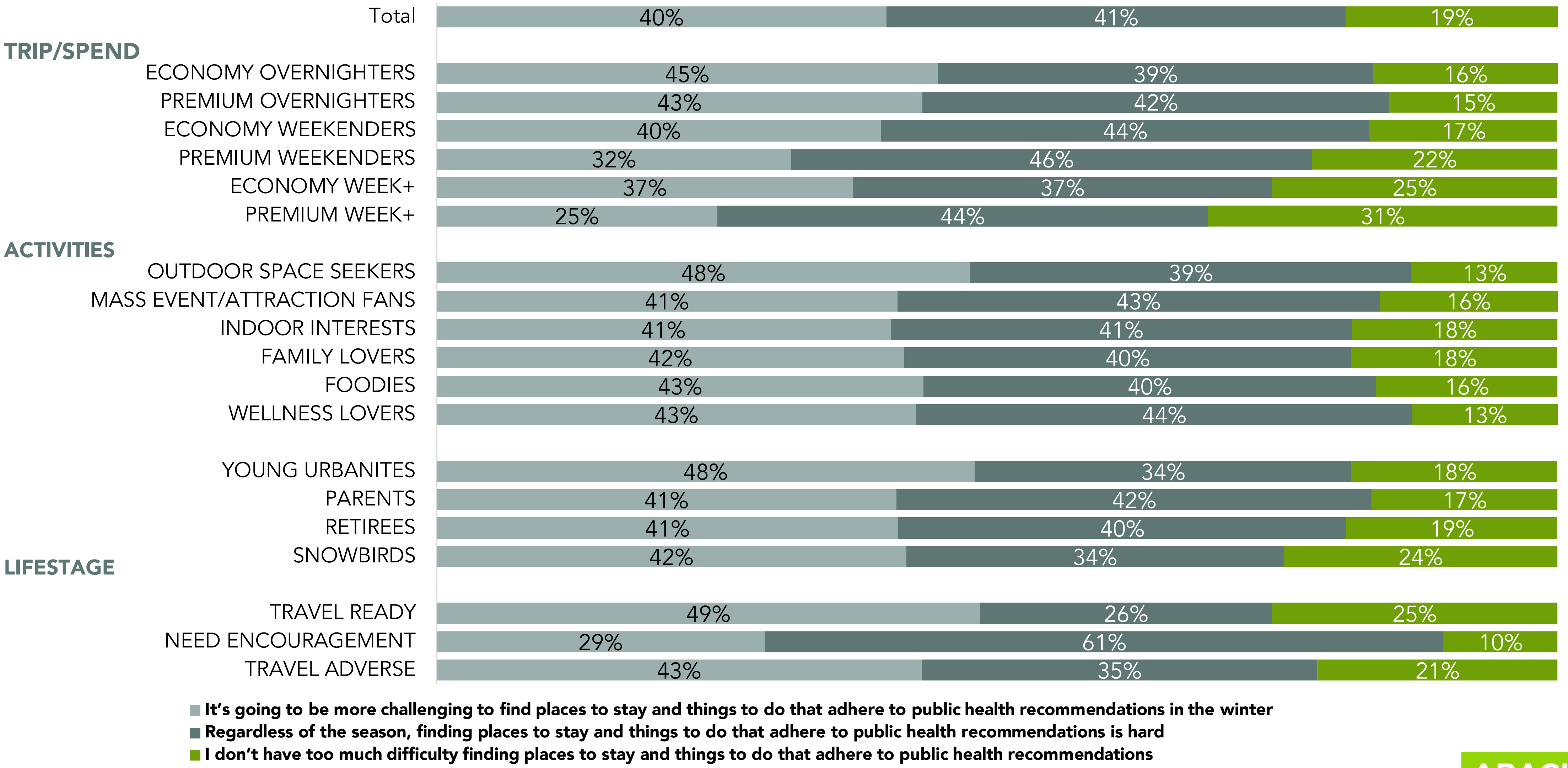
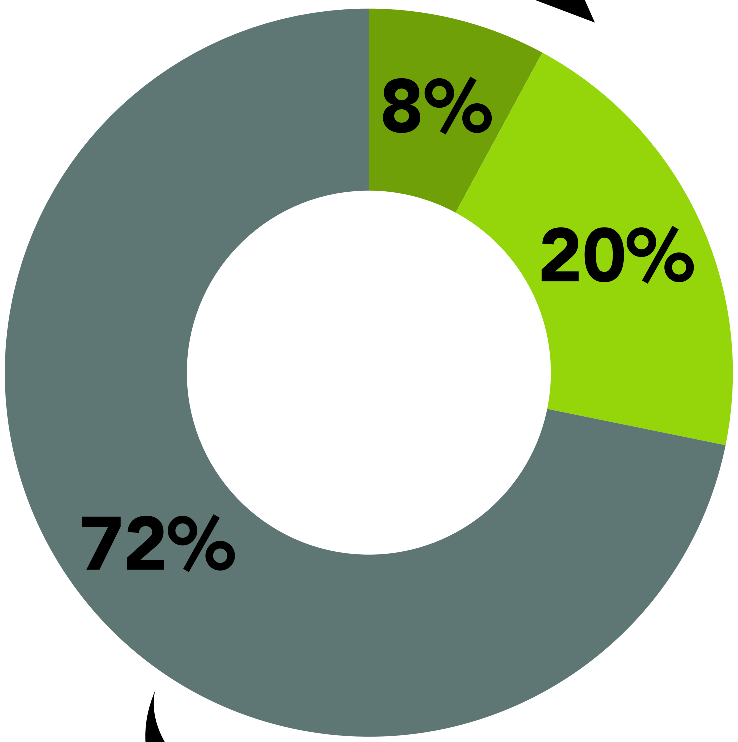
FINDING THINGS TO DO



Which of the following do you agree with most?

A SURGE OF CASES MEANS THAT AROUND 70% WON'T BE TRAVELLING OR BOOKING DURING THAT TIME

During a wave of cases, around 30% say they are still comfortable booking. Including 10% who would also travel during this time as well.



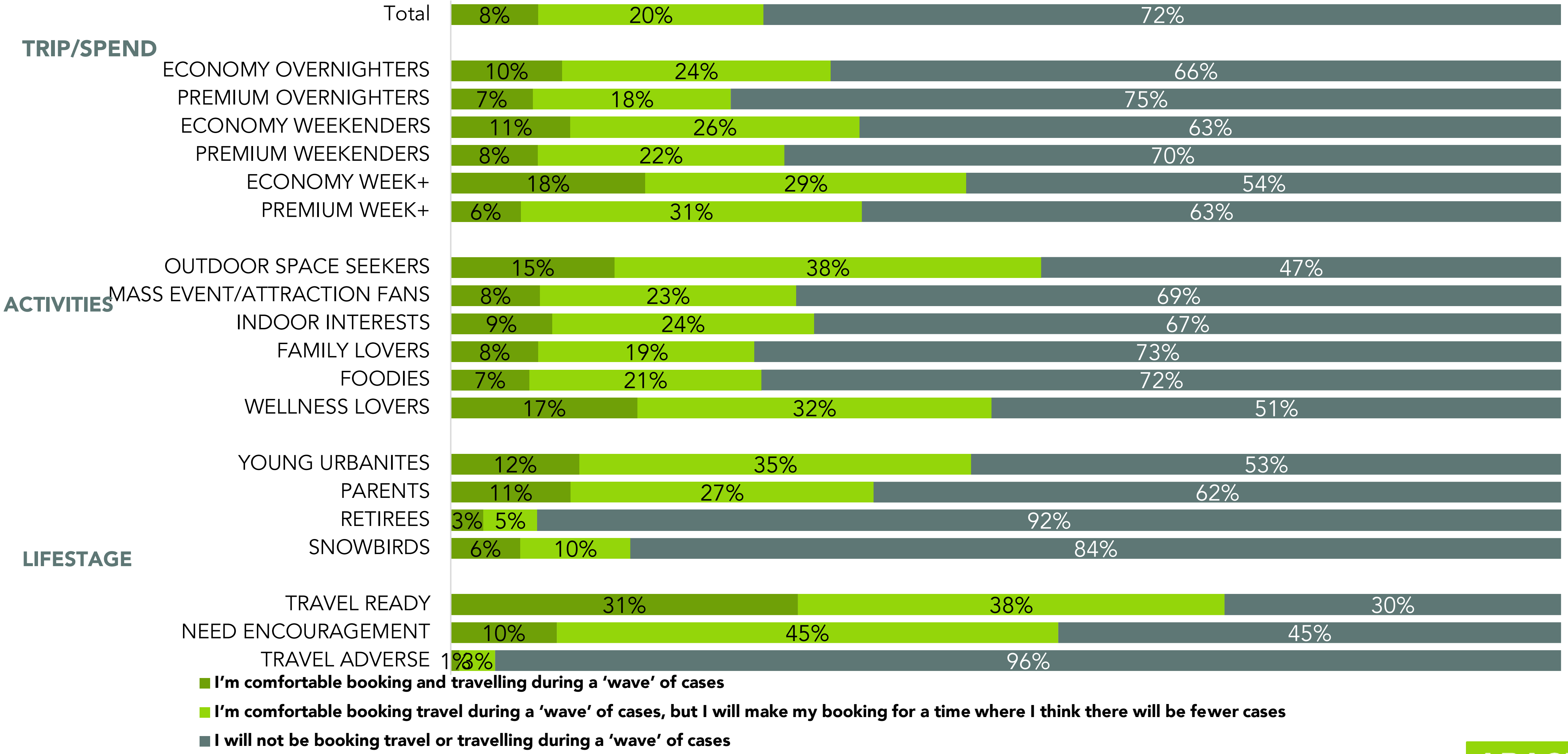
I'm comfortable booking and travelling during a 'wave' of cases

I'm comfortable booking travel during a 'wave' of cases, but I will make my booking for a time where I think there will be fewer cases

I will not be booking travel or travelling during a 'wave' of cases

Which of the following do you agree with most?

BOOKING & TRAVELLING IN A PANDEMIC



Which of the following do you agree with most?

TRAVEL READY

"If I want to travel anytime soon, I'm going to have to get used to travelling during a pandemic, and I'm comfortable navigating this new travel reality"

15%

- Less worried about COVID-19 overall
- More worried about COVID-19 affecting their ability to travel, than they are worried about another wave of cases, someone they know getting COVID-19
- Even though these individuals have accepted this new reality, half (49%) say that it will be difficult to find places to stay and things to do this winter.
- A wave of cases won't shake this group. 31% are comfortable booking and travelling during a surge, and 38% say they will book, but just not travel during that time.

Case count is less of an issue for this group. They seem to accept that waves of cases are the norm for now, and have decided that's something they can handle. Even though they are ready, this group will still need to be convinced that the reasons they travelled pre-pandemic, are still possible (even if it means a few changes).

NEEDS ENCOURAGEMENT

If I want to travel anytime soon, I'm going to have to get used to travelling during a pandemic, but I'm not very comfortable navigating this new travel reality"

28%

- More moderately worried about COVID-19 than most
- Less worried about another wave of cases than most, and less worried about someone they know getting COVID-19, though still more worried than 'travel ready'
- Unlike those who are travel ready, this group isn't hung up on finding things to do for the winter season. Instead, they just think finding things to do during a pandemic is hard, regardless of the season.
- A wave of cases is a bigger deal for these individuals. Half are still willing to at least book during a wave, but half will hold out with making any plans.

Finding things to do is less of an issue is less of an issue for this group. Instead, the overall COVID-19 situation (case counts, etc.) are a bigger influence. It doesn't mean that this group won't book. Instead, they need to be reassured of the measures in pace for their safety.

TRAVEL ADVERSE

I don't see myself travelling during the pandemic for the foreseeable future "

57%

- Much more intense worries about COVID-19 overall
- Similar concern about COVID-19 affecting their ability to travel, but twice as likely to be really worried about another spike than 'travel ready', and much more worried about a family member getting COVID-19
- Finding things to do for this group is actually easier to do, compared to those who 'need encouragement'. They feel the say way about finding activities as the 'travel ready' group.
- A wave of cases is the ultimate deciding factor for this group. 96% won't be booking or travelling during a wave of cases.

The travel behaviour of this group will be directly tied to case count. The good news is that means when cases decrease, this group is likely to travel. But when cases are high, not much can be done to change their minds.

ABACUS DATA

TRAVEL READY

"If I want to travel anytime soon, I'm going to have to <u>get used to</u> travelling during a pandemic, and I'm comfortable navigating this new travel reality"

15%

NEEDS ENCOURAGEMENT

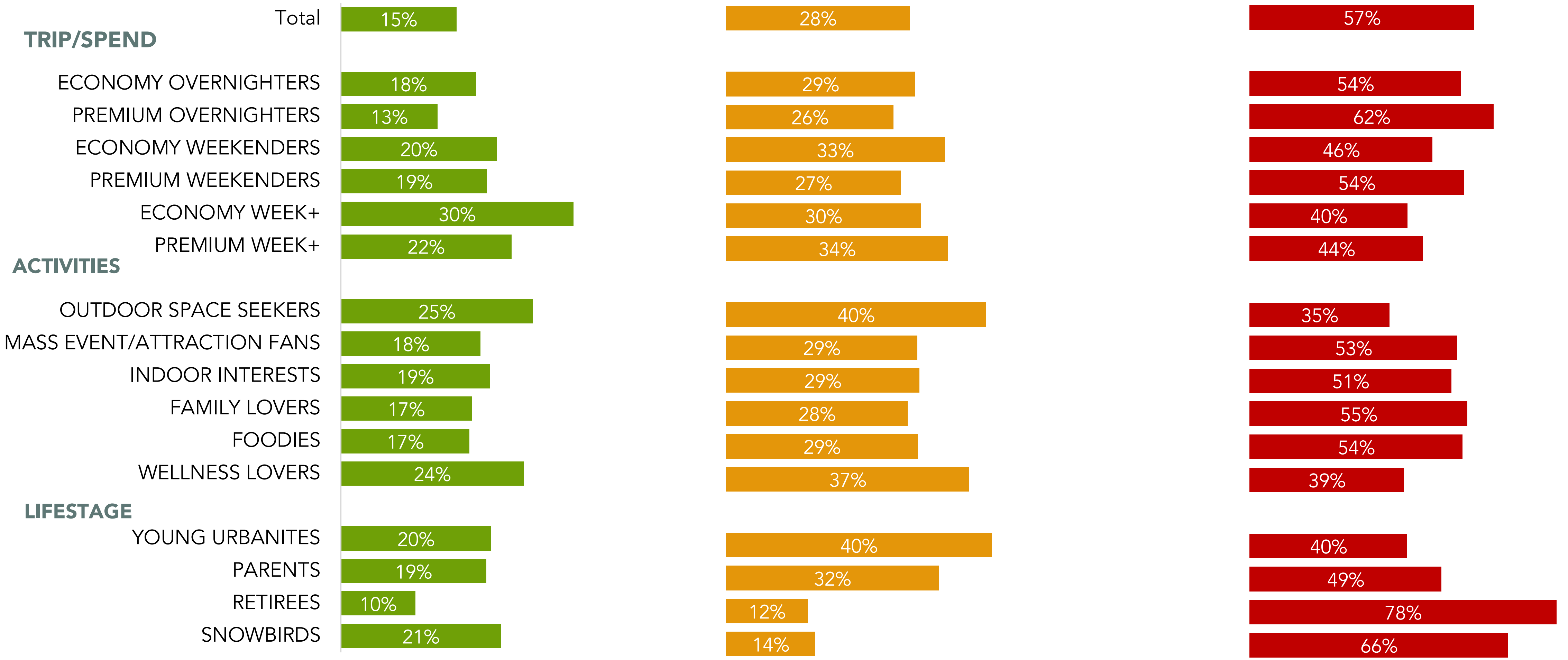
"If I want to travel anytime soon, I'm going to have to <u>get used to</u> travelling during a pandemic, but I'm not very comfortable navigating this new travel reality"

28%

TRAVEL ADVERSE

"I don't see myself travelling during the pandemic for the foreseeable future"

57%



ABACUS DATA

THE LOGISTICS

ABACUS DATA

THE LOGISTICS

- As of right now, one thirds of travellers are comfortable booking at least one trip sometime between now and March. Few have solidified their plans so now is the time to reach out.
- There is a pent up demand for travel. 88% didn't to as much travelling as usual this past summer, and 41% say they want to take at least trip before the year is over.
  - Young Ontarians, Parents, Outdoor space seekers and wellness lovers are most likely to be taking a trip before the year is up.
- But not all of the budget and time that was used for travel in the past will be budgeted for travel now. 79% say they will be dipping in to their travel budgets to spend on household things instead.
- Case count does shift behaviour slightly, but it doesn't seem to be the biggest driver. In our scenario test, likelihood to travel (in December and January) only shifted 5 pts (between those given a scenario with a decreased case count and a steady case count). The shifts are bigger among those unlikely to plan a trip independent of a growing or shrinking case count.

ABACUS DATA

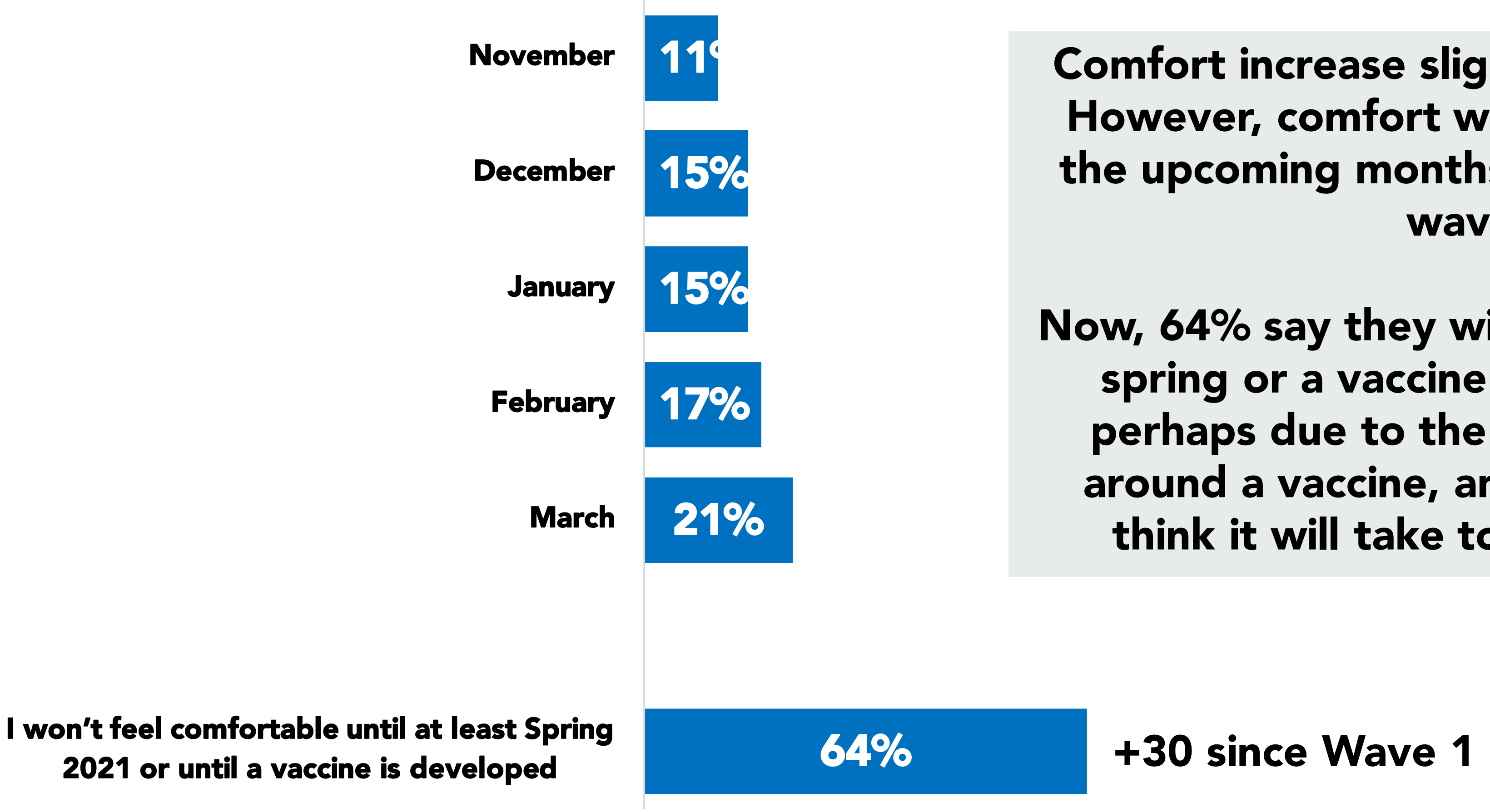
THE LOGISTICS

- Government websites continue to be the go-to sources for information on how and where to travel. Destination websites will also be important sources.
- There are early signs that the provincial government's staycation program will help drive Ontario tourism—especially travel early on in the year. 56% say they are likely to use this kind of program. Among those who are going to be travelling during this winter season? 71% are likely to use it.
- When it comes to business travel, half are open to it.

THE LOGISTICS

PHILOSOPHY ABOUT TRAVELLING DURING COVID-19	
TRAVEL READY "If I want to travel anytime soon, I'm going to have to get used to travelling during a pandemic, and I'm comfortable navigating this new travel reality "	78% are comfortable travelling in the winter season. 19% have already booked something. And 70% want to make a trip before the year is over. 67% would travel in December if cases decrease, 58% if they hold steady. 67% are likely to use the 'staycation' program.
NEEDS ENCOURAGEMENT "If I want to travel anytime soon, I'm going to have to get used to travelling during a pandemic, but I'm not very comfortable navigating this new travel reality "	Right now, 55% are comfortable travelling in the winter season. 12% have already booked something. Despite their hesitation 61% want to travel once more before the year is up. 58% would travel in December if cases decrease, 56% if they hold steady. 73% are likely to use the 'staycation' program.
TRAVEL ADVERSE "I don't see myself travelling during the pandemic for the foreseeable future "	Right now only 15% are comfortable travelling in the winter season. Only 2% have made a booking. Even with their concerns, 1 in 4 want to take a trip before the year is up. 10% would travel in December if cases decrease, 10% if they hold steady. 45% are likely to use the 'staycation' program.

COMFORTABLE TRAVELING NOT TOO SOON, NOT TOO LATE

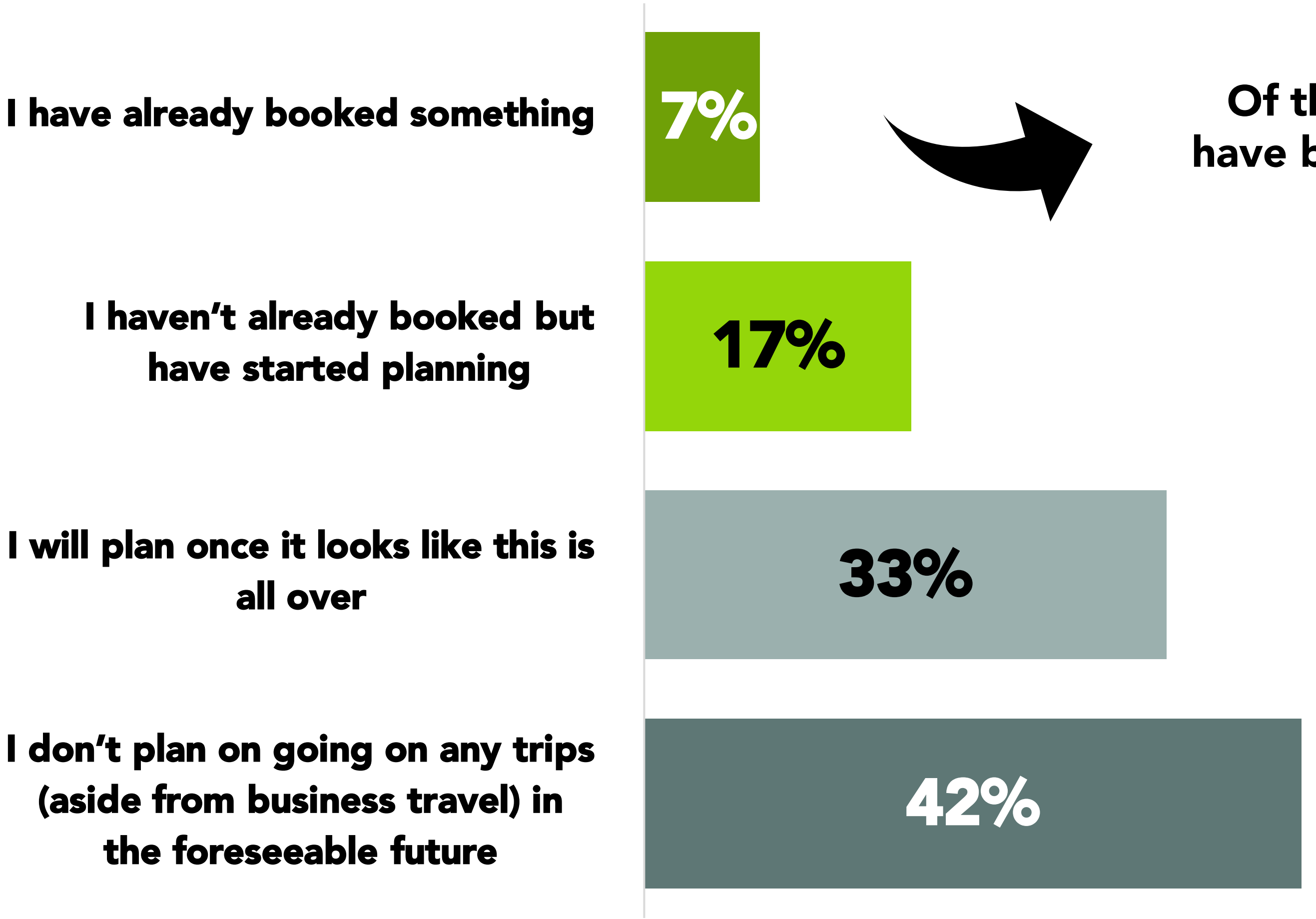


Comfort increase slightly as time goes on. However, comfort with booking travel in the upcoming months, is less certain than wave 1.

Now, 64% say they will be waiting until the spring or a vaccine developed. This is perhaps due to the changing narrative around a vaccine, and how long people think it will take to arrive in Canada.

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



Of those who have booked, 55% have booked a trip within Ontario in the next 6 months.

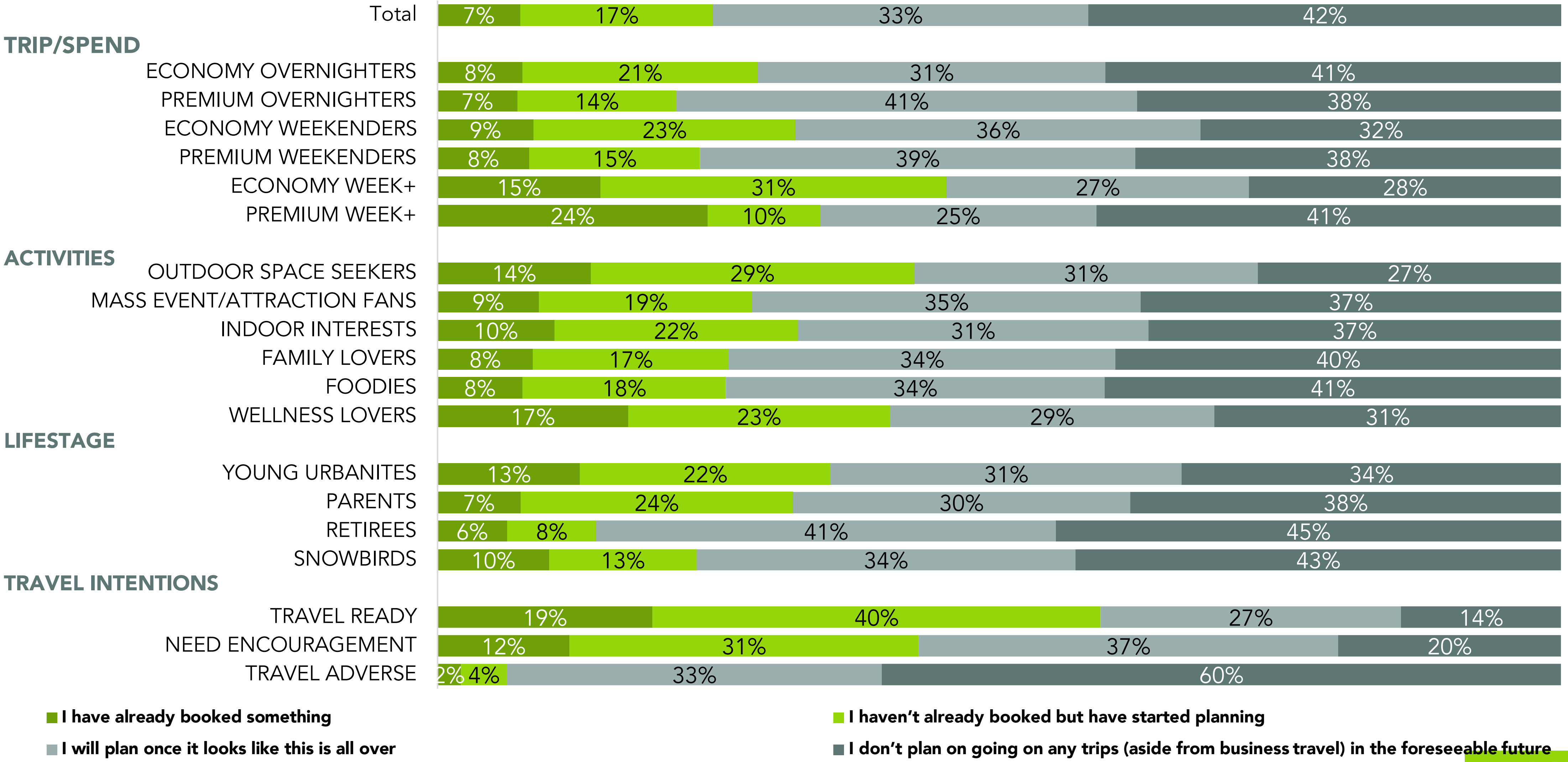
Very few have actually booked travel so far.

Most haven't even started making plans.

Those who are keeping plans on hold for the foreseeable future has increased 17 pts.

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?/Did you book a trip within Ontario within the next 6 months? (those who booked)

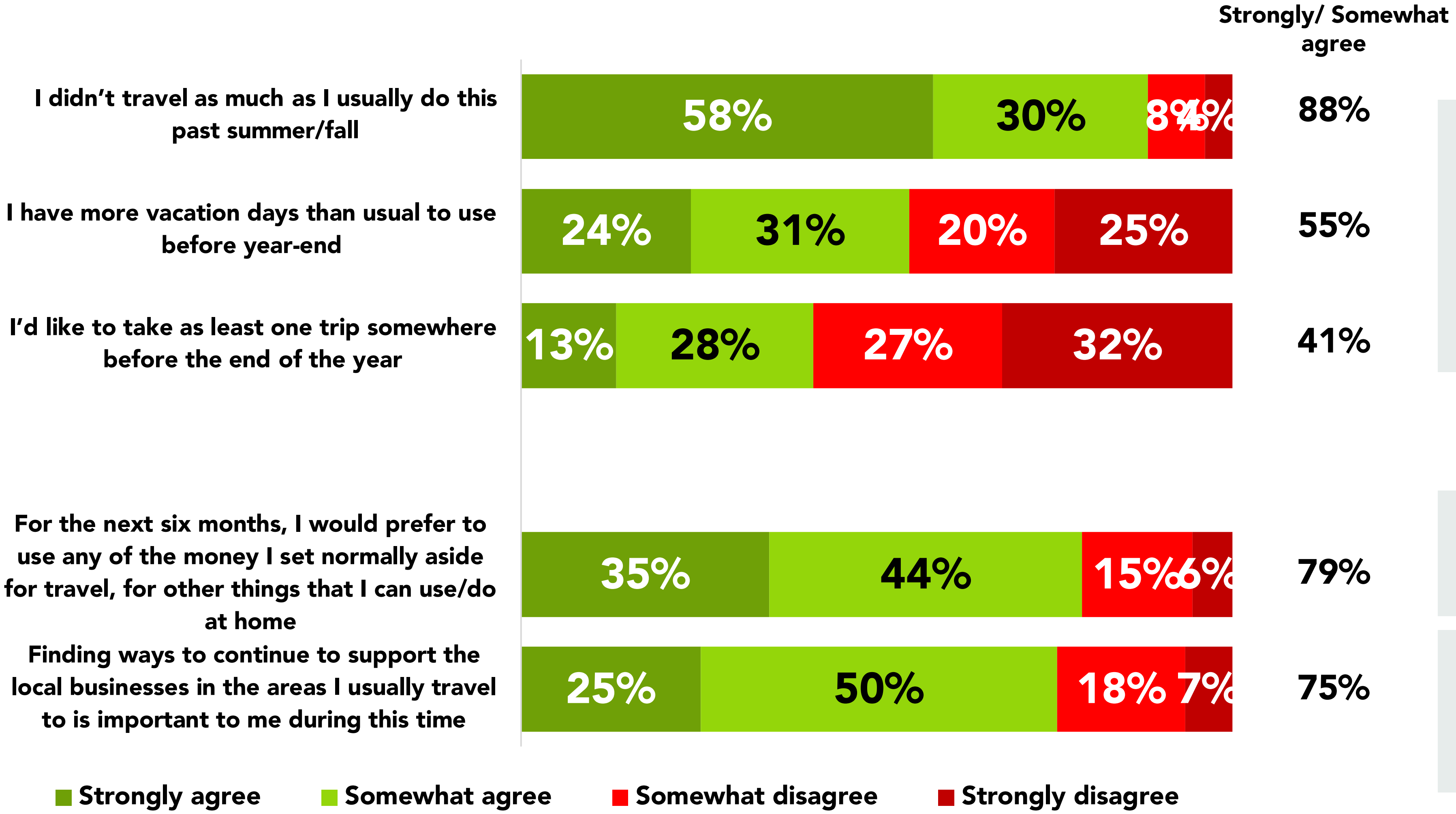
FUTURE TRAVEL BOOKINGS



ABACUS DATA

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?

SOME PENT UP DESIRE TO TRAVEL BUT ALSO INTEREST IN DIRECTING SPEND ELSEWHERE



There is some pent up desire to travel.
Close to 90% didn't travel as much in the past few months.
And 4 in 10 say they want to take at least one trip before the year is over.

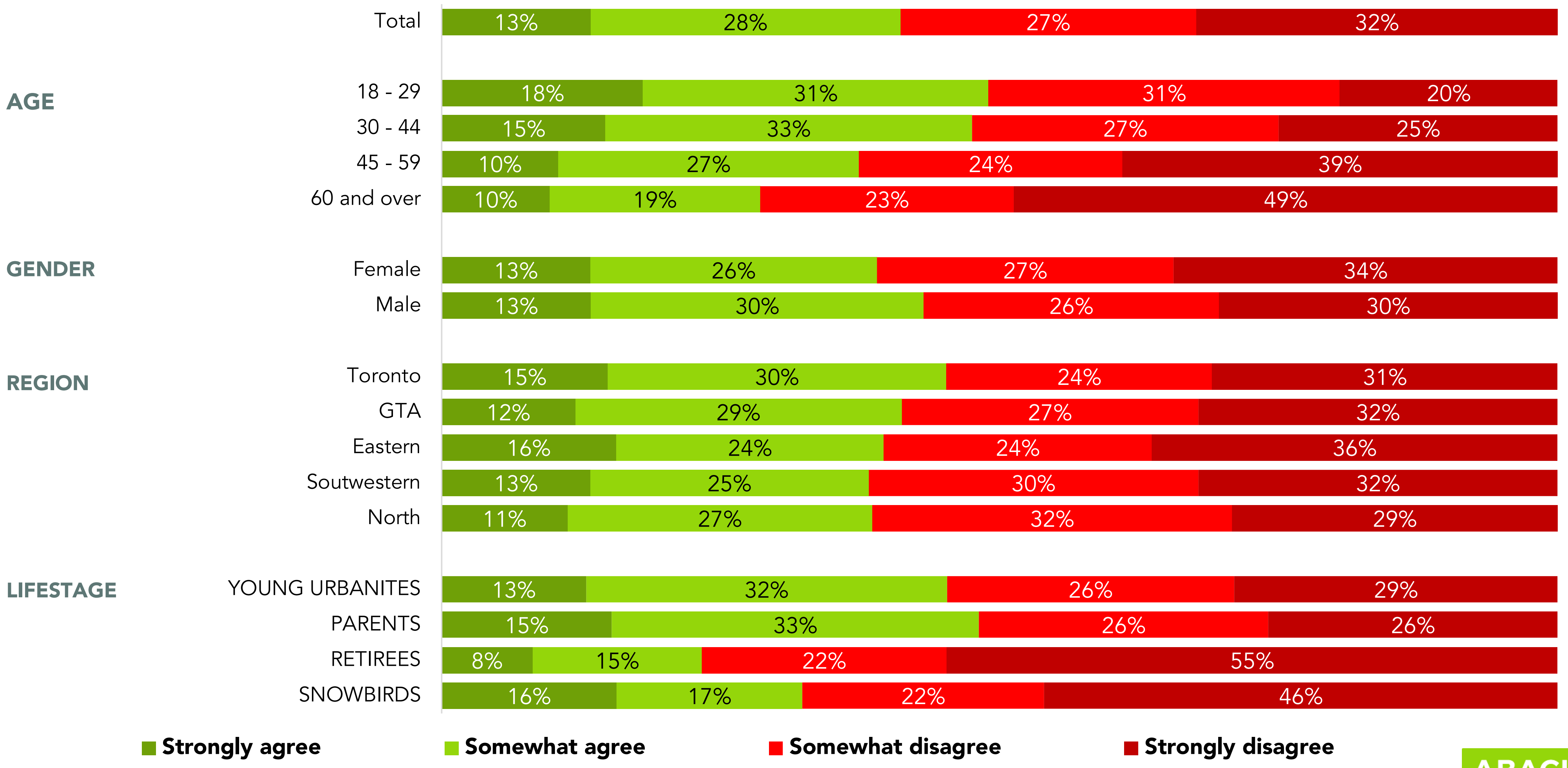
Conversely, there is also some desire to spend elsewhere instead.

Regardless, travellers are still keen to support the destinations they usually frequent.

Do you agree or disagree with the following:

ABACUS DATA

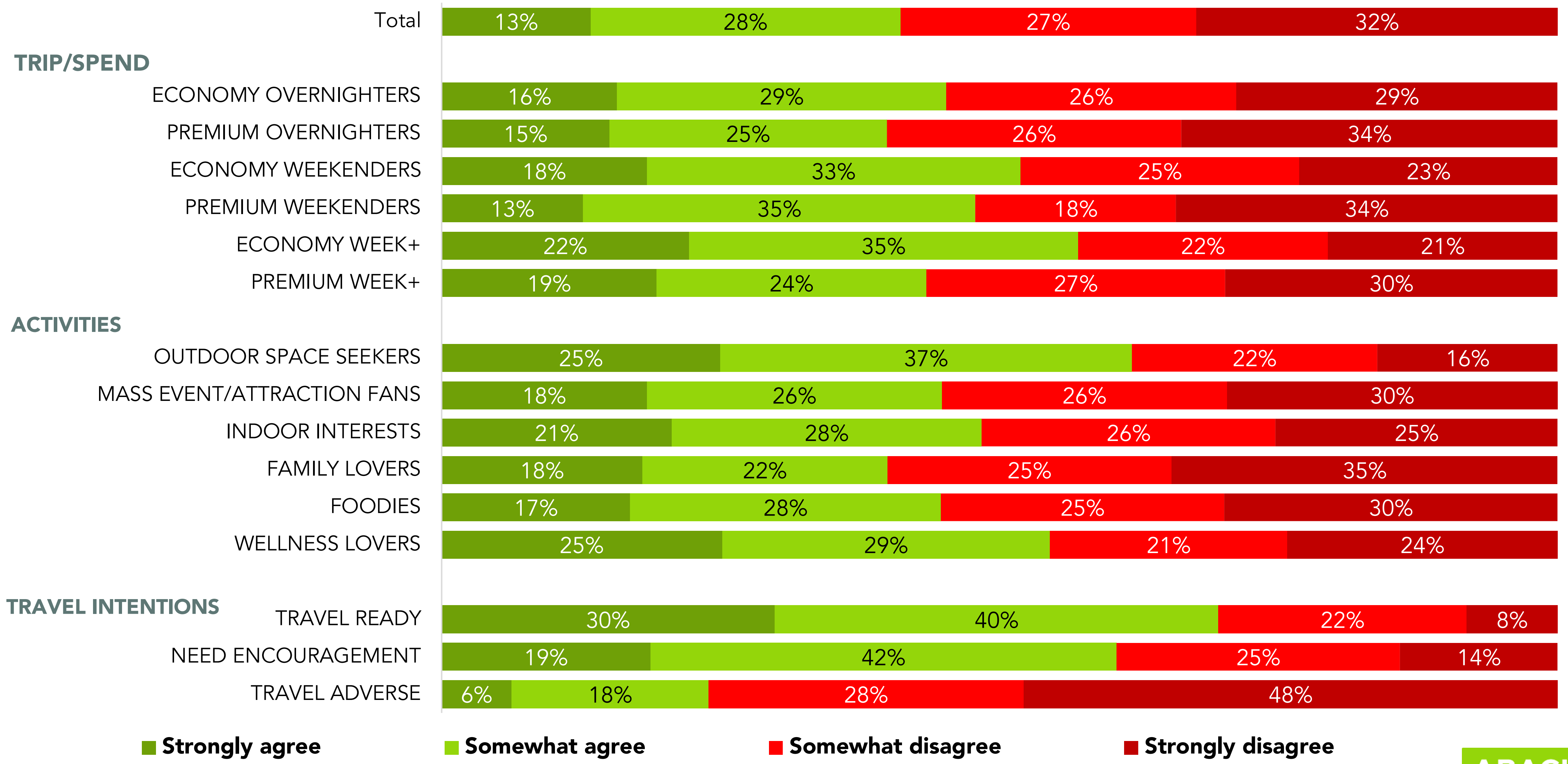
I'D LIKE TO TAKE AT LEAST ONE TRIP SOMEWHERE…



Do you agree or disagree with the following:

ABACUS DATA

I'D LIKE TO TAKE AT LEAST ONE TRIP SOMEWHERE…

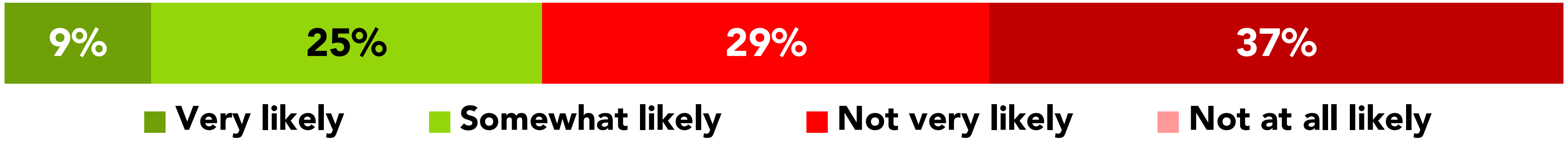


ABACUS DATA

Do you agree or disagree with the following:

POSSIBLE SCENARIOS [SPLIT SAMPLE]…

It's mid-December and it looks like cases are decreasing. You are trying to decide whether to book a trip during the holiday season.



OR

It's mid-December and it looks like cases have been holding steady. You are trying to decide whether to book a trip during the holiday season

The same ratio of travellers seem intent on making a trip in December, regardless of case count.

It's now January, and cases seem to be on the decline. You didn't travel during the holiday season and are now looking to book a trip during an off-peak time during January/February.

OR

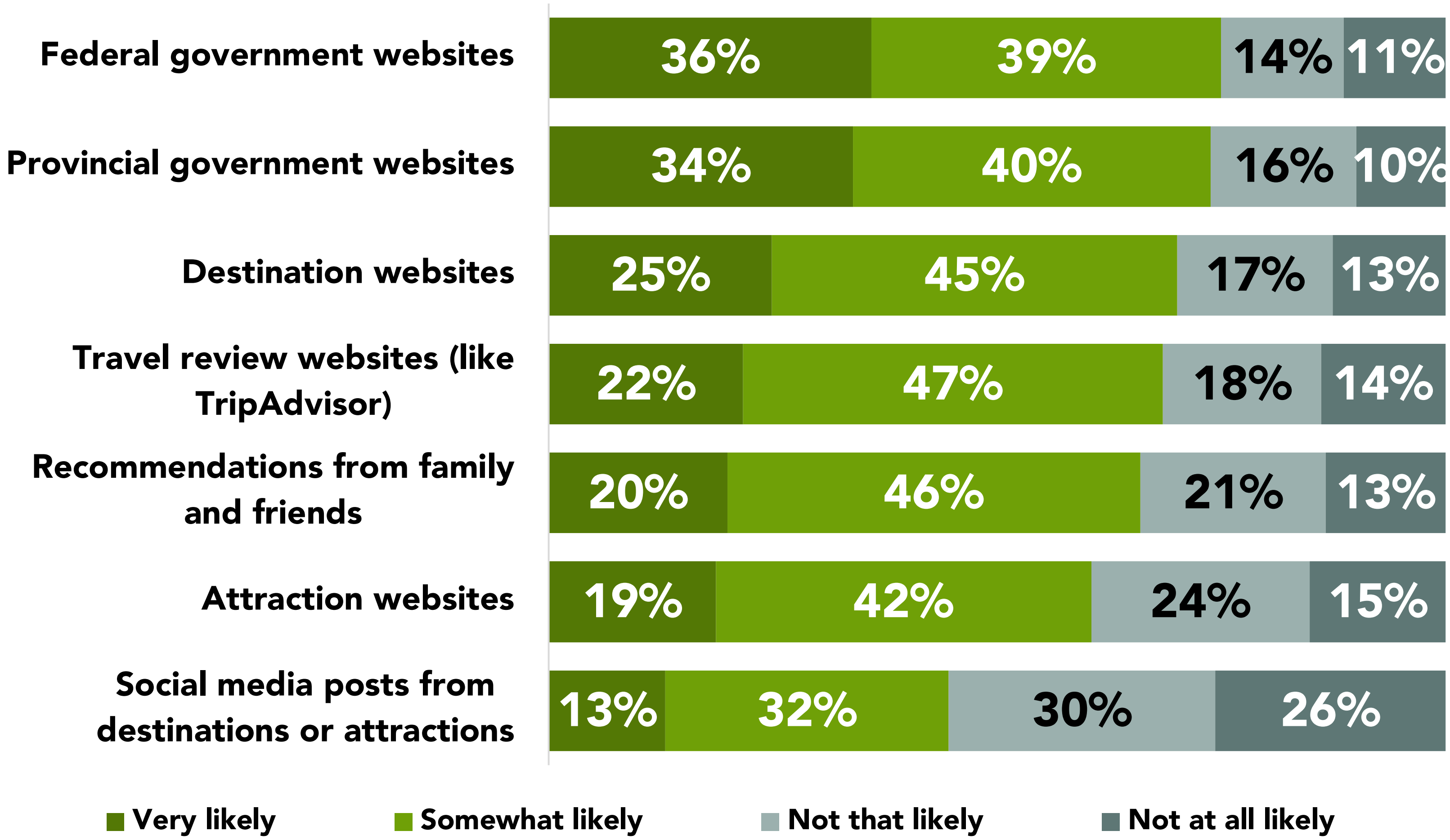
It's now January, cases are still fairly steady. You didn't book a trip during the holiday season, but right now is an 'off-peak' time to travel.

The same can be said about travelling in January.

ABACUS DATA

For each of the following scenarios, would you be very likely to book a trip, somewhat likely to book a trip, not very likely to book a trip, or not at all likely book a trip:.

HOW TO TRAVEL: GOVERNMENT, DESTINATION WEBSITES ARE A FIRST STEP



Travellers are likely to look at sources that give them the most broad, comprehensive coverage of information (i.e. info on the entire province/destination).

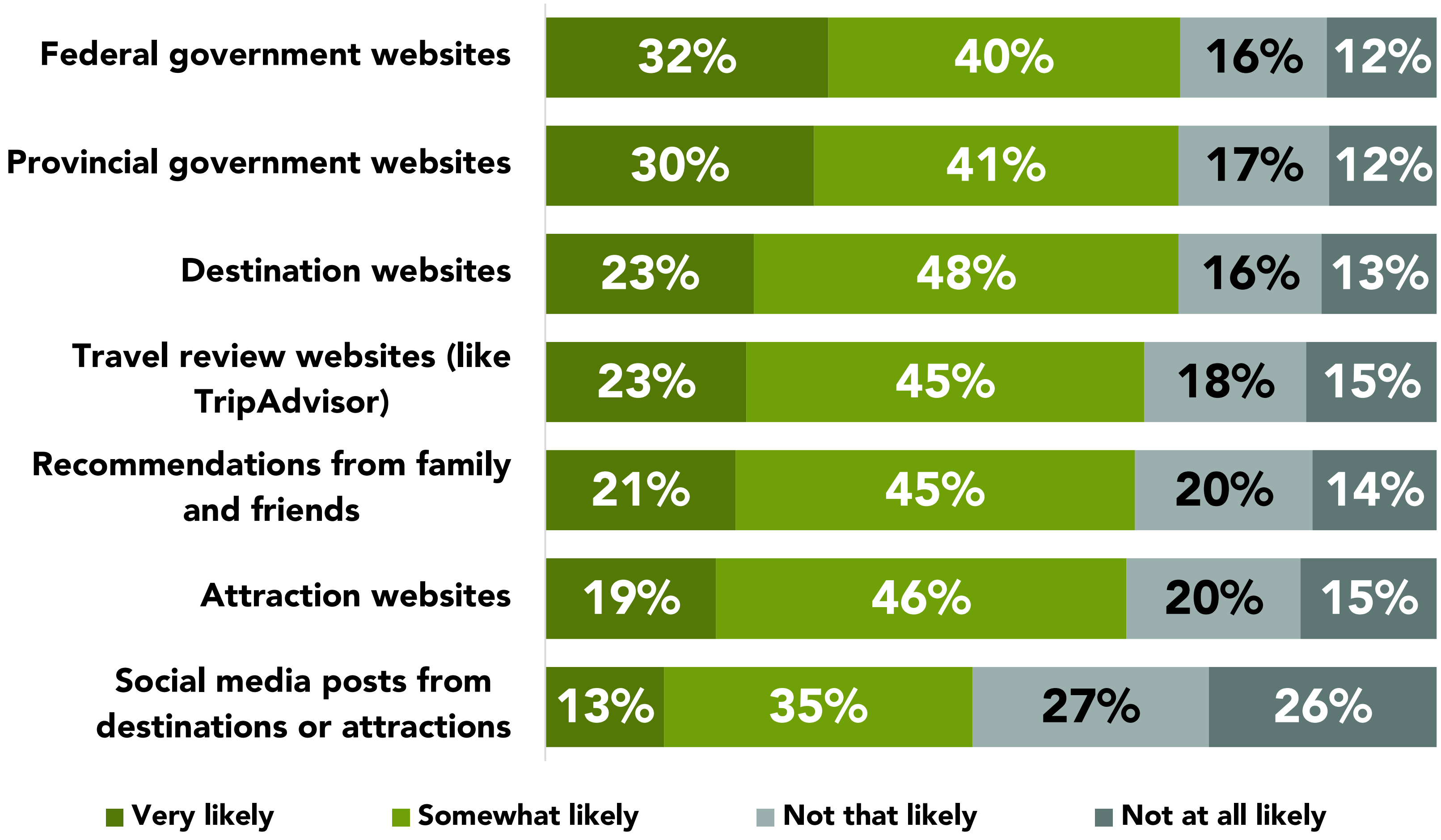
Official federal and provincial websites are likely to be the most used sources for information on how to travel.

Destination and travel review sites are second.

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

ABACUS DATA

WHERE TO TRAVEL: GOVERNMENT WEBSITES, DESTINATION SITES ARE IMPORTANT



Again, federal government websites, and provincial government websites are likely to be the most used sources on where to travel.

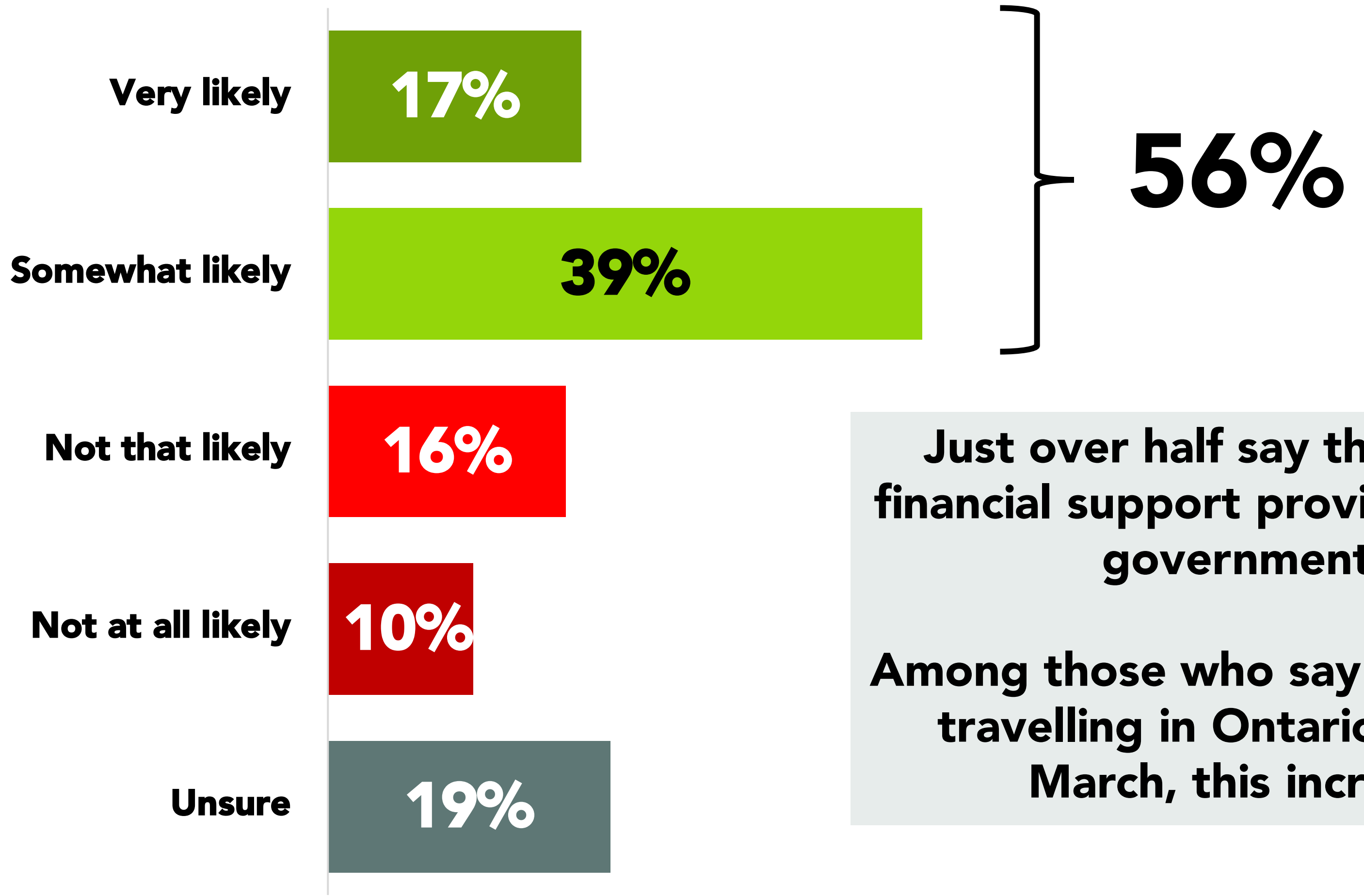
Next is crowd-sourced information (from review sites) or recommendations from someone they know.

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

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

ABACUS DATA

JUST OVER HALF SHOW INTEREST IN THE NEW GOVERNMENT 'STAYCATION' PROGRAM



Just over half say they are likely to use financial support provided by the provincial government for travel.

Among those who say they are comfortable travelling in Ontario sometime before March, this increased to 71%.

Last week the Ontario government announced 2021 is the 'year of the staycation' in Ontario. The government will provide Ontario residents with support for up to 20 percent for eligible tourism expenses in 2021. How likely is it that you would use this program to travel within Ontario next year?

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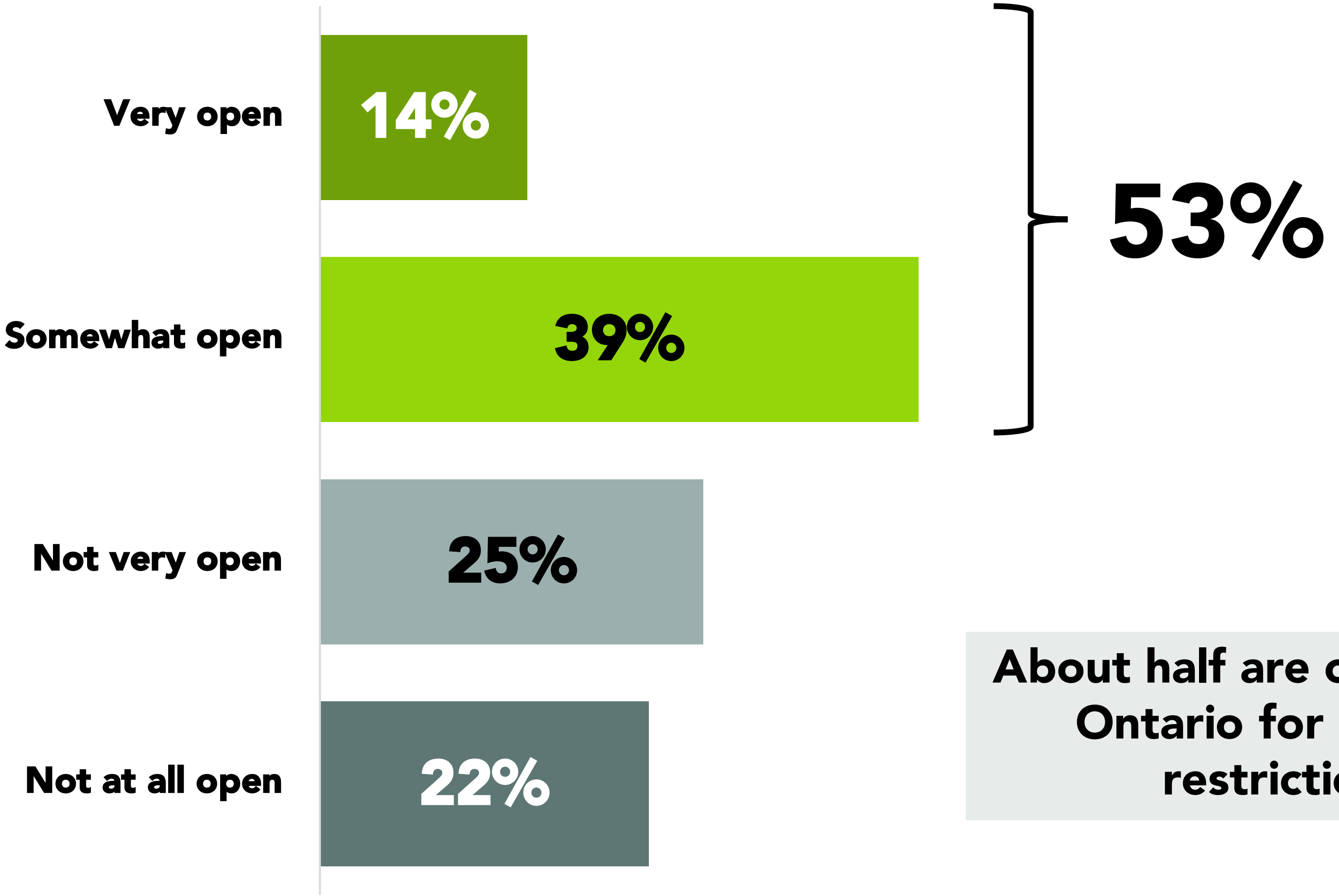
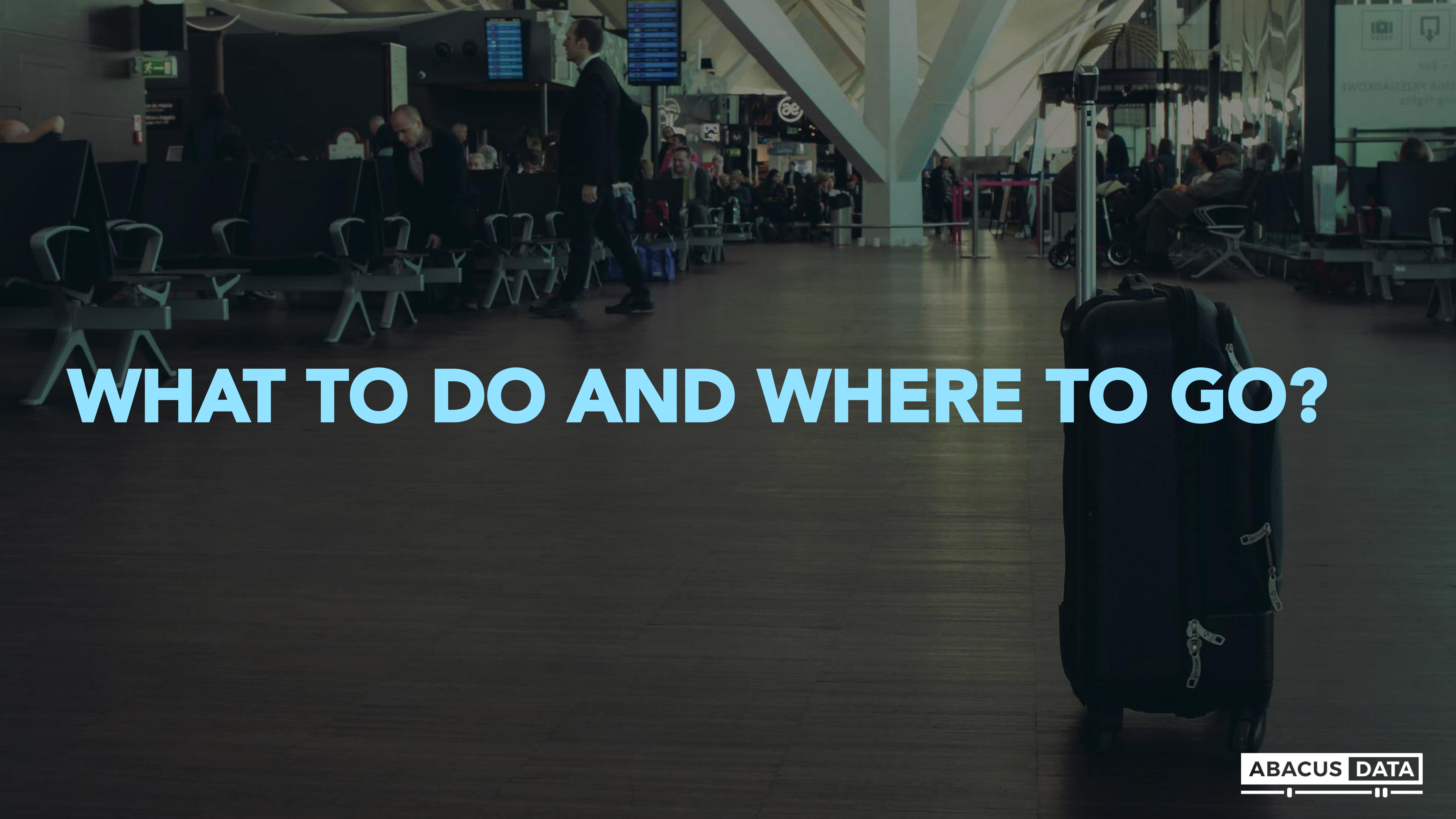
OPENNESS TO TRAVELLING FOR BUSINESS? CAUTIOUSLY OPTIMISTIC



About half are open to travelling within Ontario for business once travel restrictions begin to lift.

When travel restrictions begin to lift, how open will you be to travelling within Ontario for business?



WHAT TO DO AND WHERE TO GO?

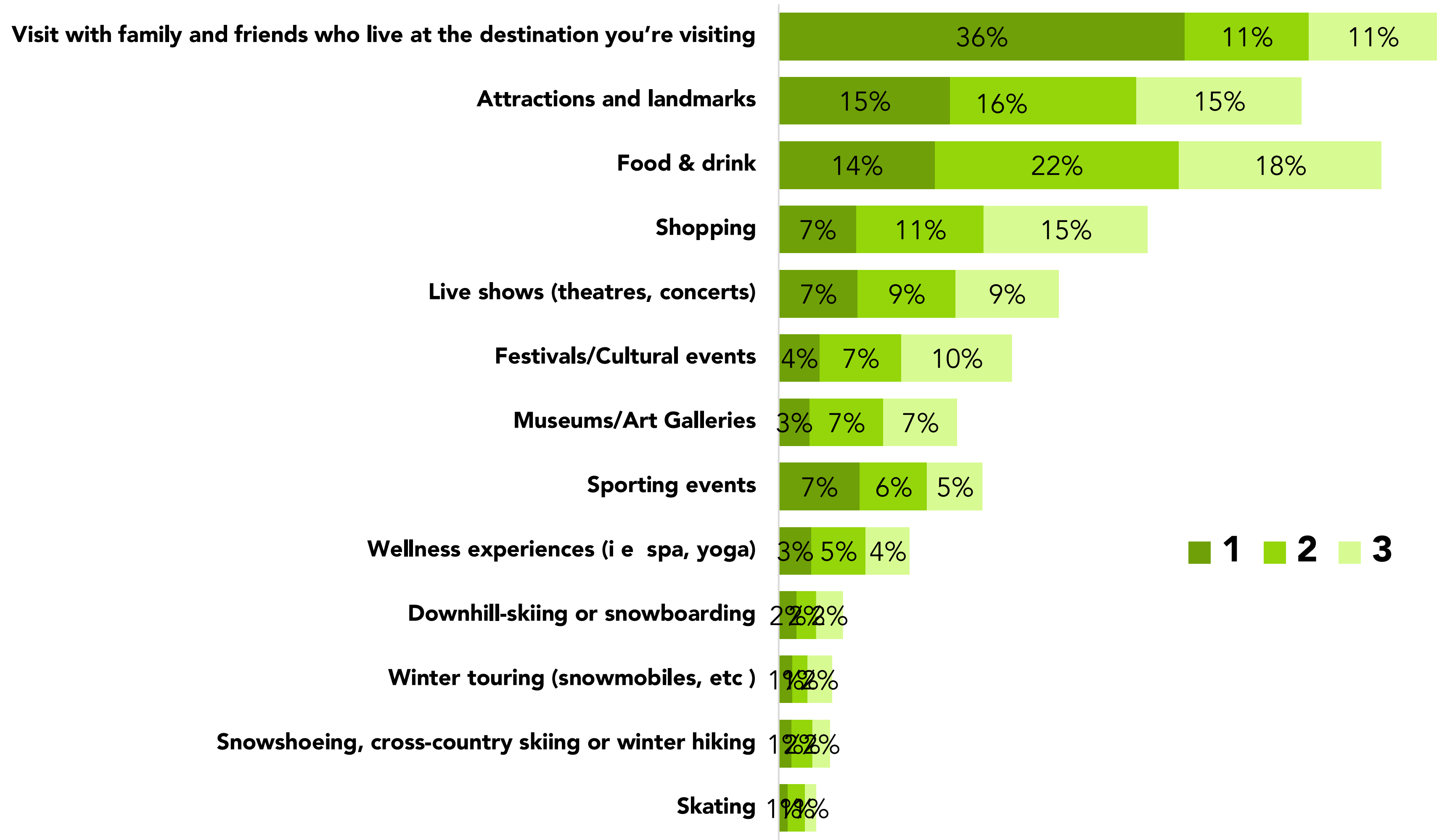
WHAT TO DO AND WHERE TO GO?

- **Many of the same preferences we saw in the summer continue to hold true.**
  1. **Closer, shorter trips are the most likely.**
  2. **Activities/destinations that allow for space are the most preferred.**
  3. **Above all else, people are still looking forward to visiting with family and friends the most.**
- **There is less interest to travel in province (compared to the summer) but it is still the most likely destination if someone were to book a trip.**
  - **And for those that did travel out of province (to another country or province) they are going to be choosing a destination closer to home.**
- **More remote destinations still garner the highest levels of comfort, but discomfort remains the same regardless of location. Those uncomfortable with large cities are just as likely to cite 'crowds' as a concern as those who cite this as a reason for being uncomfortable with a rural destination. This might indicate that regardless of destination, there are concerns about having to be near others at some point.**

WHAT TO DO AND WHERE TO GO

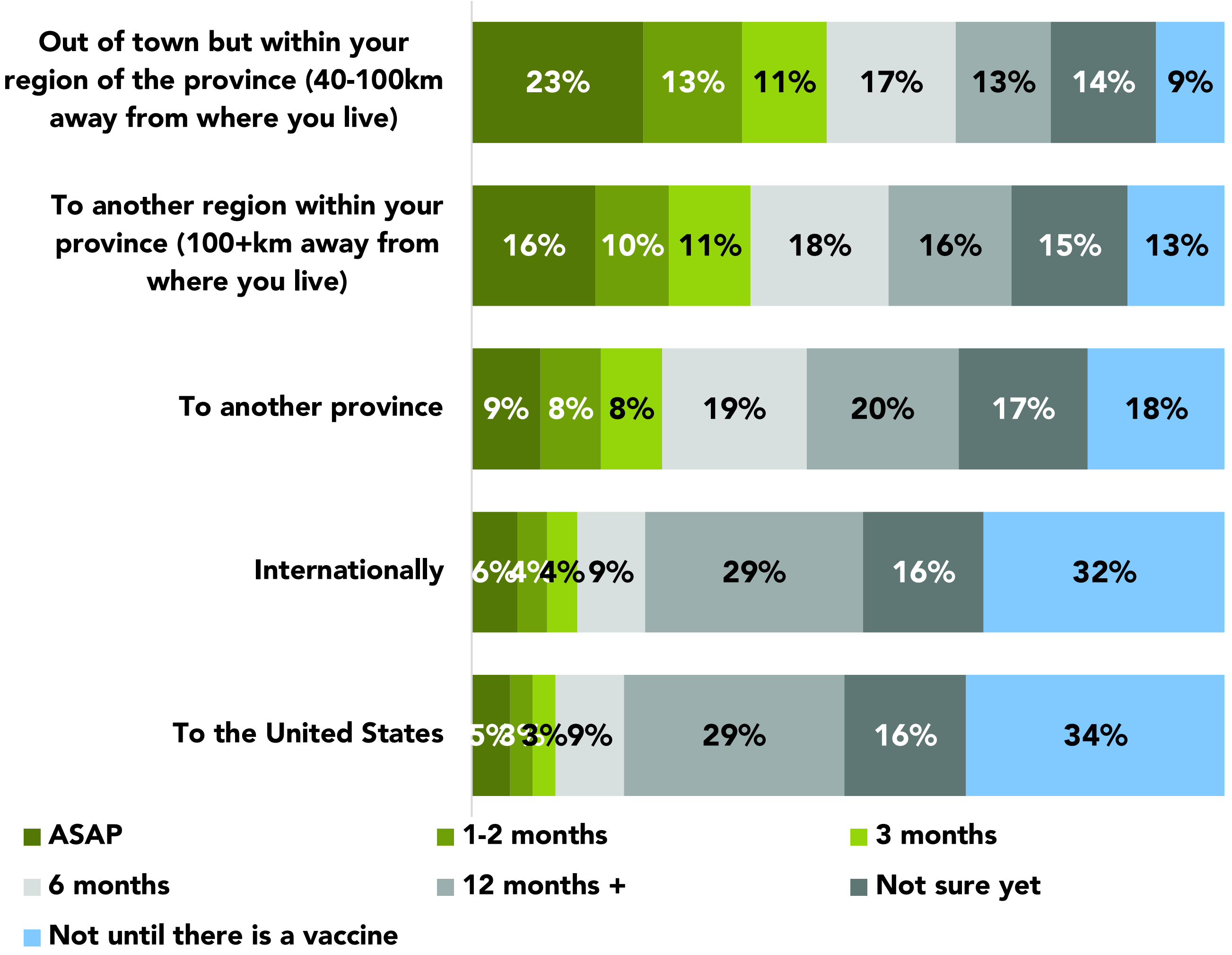
PHILOSOPHY ABOUT TRAVELLING DURING COVID-19	
TRAVEL READY "If I want to travel anytime soon, I'm going to have to get used to travelling during a pandemic, and I'm comfortable navigating this new travel reality "	• 76% would book a trip within their region in the next 3 months. 67% would book a trip outside their region within the province in the next 3 months. • 78% will be at least likely to make a day trip during the next 6 months within Ontario. Weekend trip? 71% likely. And a week long trip: 55% at least likely. • Over 80% are comfortable with all types of destinations (from parks to large urban centres).
NEEDS ENCOURAGEMENT "If I want to travel anytime soon, I'm going to have to get used to travelling during a pandemic, but I'm not very comfortable navigating this new travel reality "	• 54% would book a trip within their region in the next 3 months. 49% would book a trip outside their region within the province in the next 3 months. • 70% will be at least likely to make a day trip during the next 6 months within Ontario. Weekend trip? 59% likely. And a week long trip: 42% at least likely. Over 80% are comfortable with all types of destinations (from parks to large urban centres. Over 75% are comfortable with all types of destinations (from parks to large urban centres).
TRAVEL ADVERSE "I don't see myself travelling during the pandemic for the foreseeable future "	• 34% would book a trip within their region in the next 3 months. • 22% would book a trip outside their region within the province in the next 78% will be at least likely to make a day trip during the next 6 months within Ontario. • 48% will be at least likely to make a day trip during the next 6 months within Ontario. Weekend trip? 24% likely. And a week long trip: only 11% at least likely. • Over 60% are comfortable with all types of destinations-except for large urban centres where only 40% are comfortable with this kind of destination.

MOST LOOK FORWARD TO VISITING WITH FAMILY AND FRIENDS



When you do get back into travelling, what are you most looking forward to…?Please rank the top THREE things you are most looking forward to

TIME HORIZON FOR DIFFERENT DESTINATIONS



Travel in next 3 months

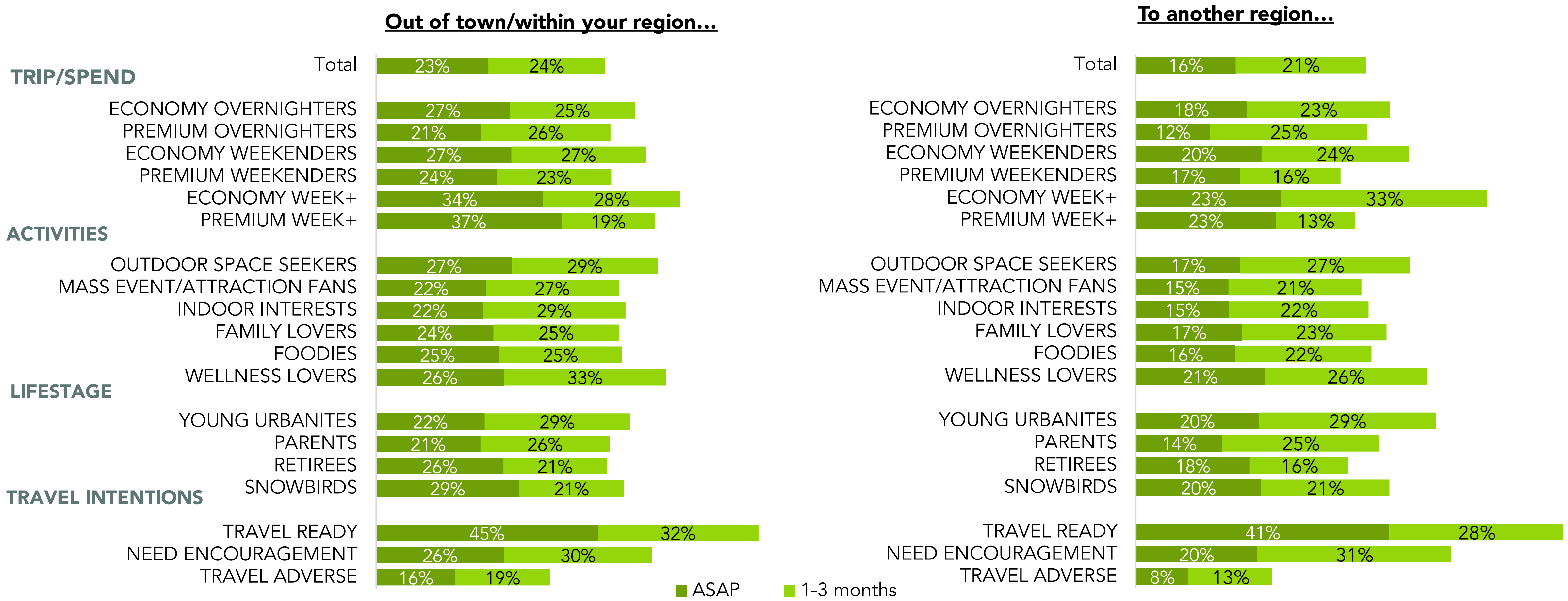
Wave 2	Wave 1
47%	60%
37%	50%
25%	33%
13%	12%
12%	17%

Comfort levels for travel within province are lower than in Wave 1, though close to half are interested in making a trip within their region in the next 6 months.

Travelling in province still remains the likely choice for people should they choose to book a trip. Now less than 1 in 4 are comfortable travelling to another province, and comfort travelling to the United States has declined substantially as well.

How long will it be before you feel comfortable travelling **not interested removed

TRAVEL THIS WINTER…



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.

How long will it be before you feel comfortable travelling **not interested removed

ABACUS DATA

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)	**33%** **Within their own region** -10pts from Wave 1	**31%** **To other ON regions** -5 pts from Wave 1	**71%** Less likely/definitely won't be travelling to the US this summer/fall + 11 pts from Wave 1
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)	**39%** **Within their own region** -4pts from Wave 1	**34%** **To other ON regions**	**62%** 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)	**35%** **Within their own region** -14pts from Wave 1	**32%** **To other ON regions** -14pts from Wave 1	**50%** Less likely/definitely won't be travelling to another province int'l this summer/fall + 10 pts from Wave 1
Snowbirds	**More likely to be travelling…** (much/somewhat more likely)	**22%** **Within their own region**	**13%** **To other ON regions**	**86%** Less likely/definitely won't be travelling to the US **85%** Less likely/definitely won't be travelling to int'lly

Those who travelled to further destinations will be travelling closer to home this winter, though they are less eager to switch destinations compared to this summer.

Among those who never took a trip within their own region last summer, 12% say they are likely to try it out this winter.

And for those who never took a trip elsewhere in the province, 14% will likely do so this summer.

Snowbirds do not seem interested in travelled more than usual to a destination in Ontario. That said, a majority say they are less likely/definitely not booking to a warm destination either.

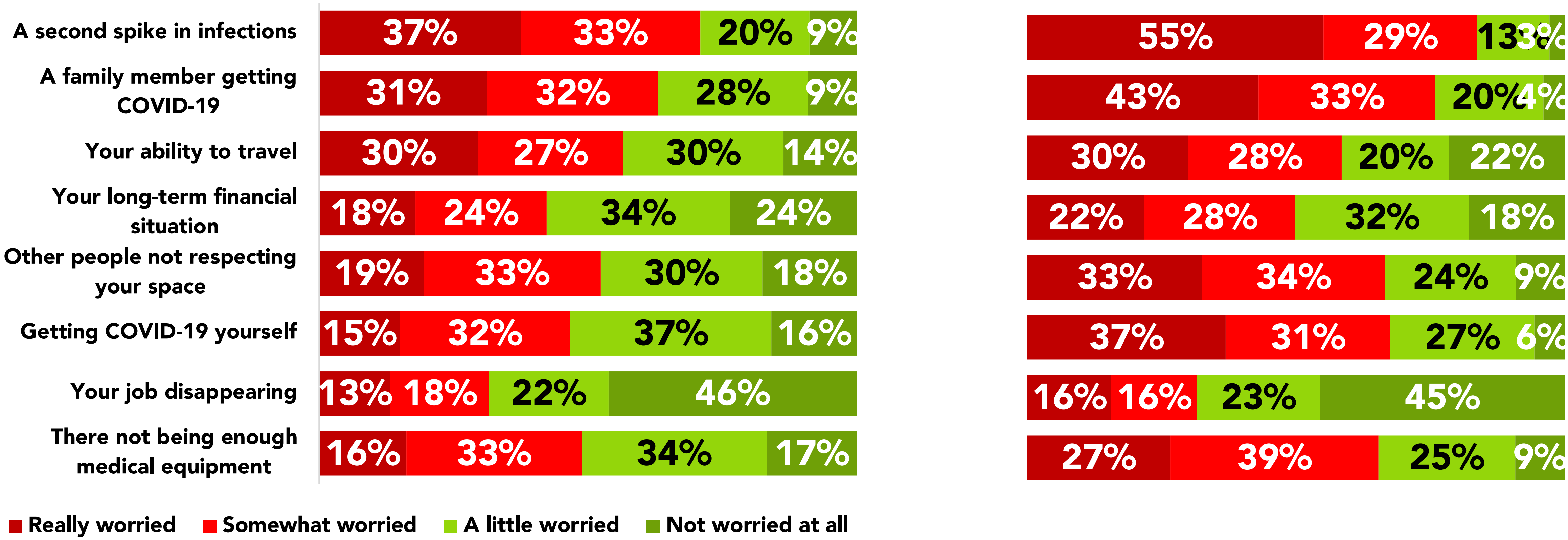
Thinking about the upcoming summer and fall, compared to your travel habits last year, are you more or less likely to choose the following travel destinations this sum

ABACUS DATA

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 6 months + or they just aren't sure yet

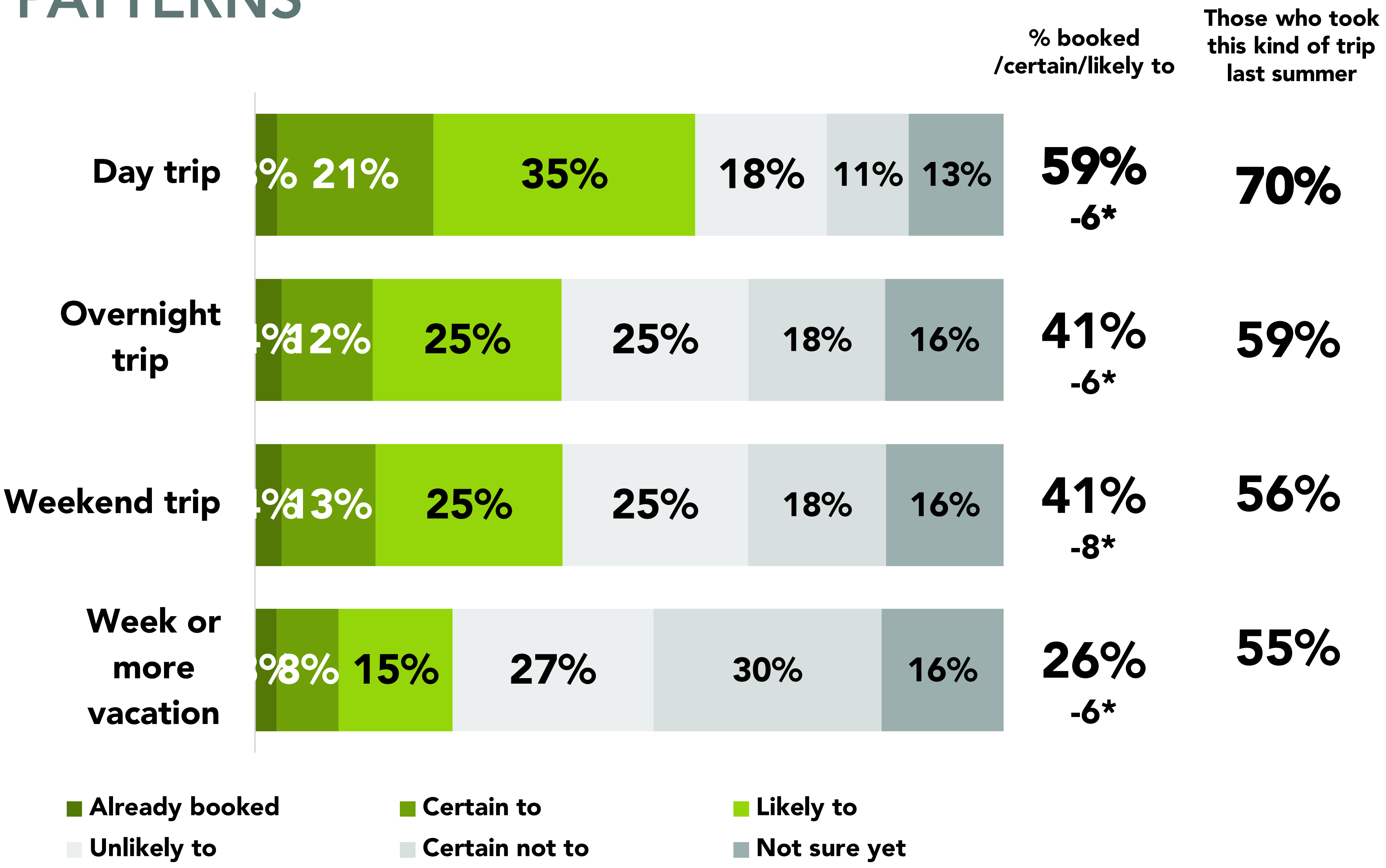


Compared to those who are comfortable with travel, travelers who aren't booking soon have many concerns. They are much more concerned about a spike in infections, a family member/themselves getting COVID, physical distancing and contracting COVID-19.

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

ABACUS DATA

TRAVEL: SHORTER, BUT CONSISTENT WITH PAST TRAVEL PATTERNS



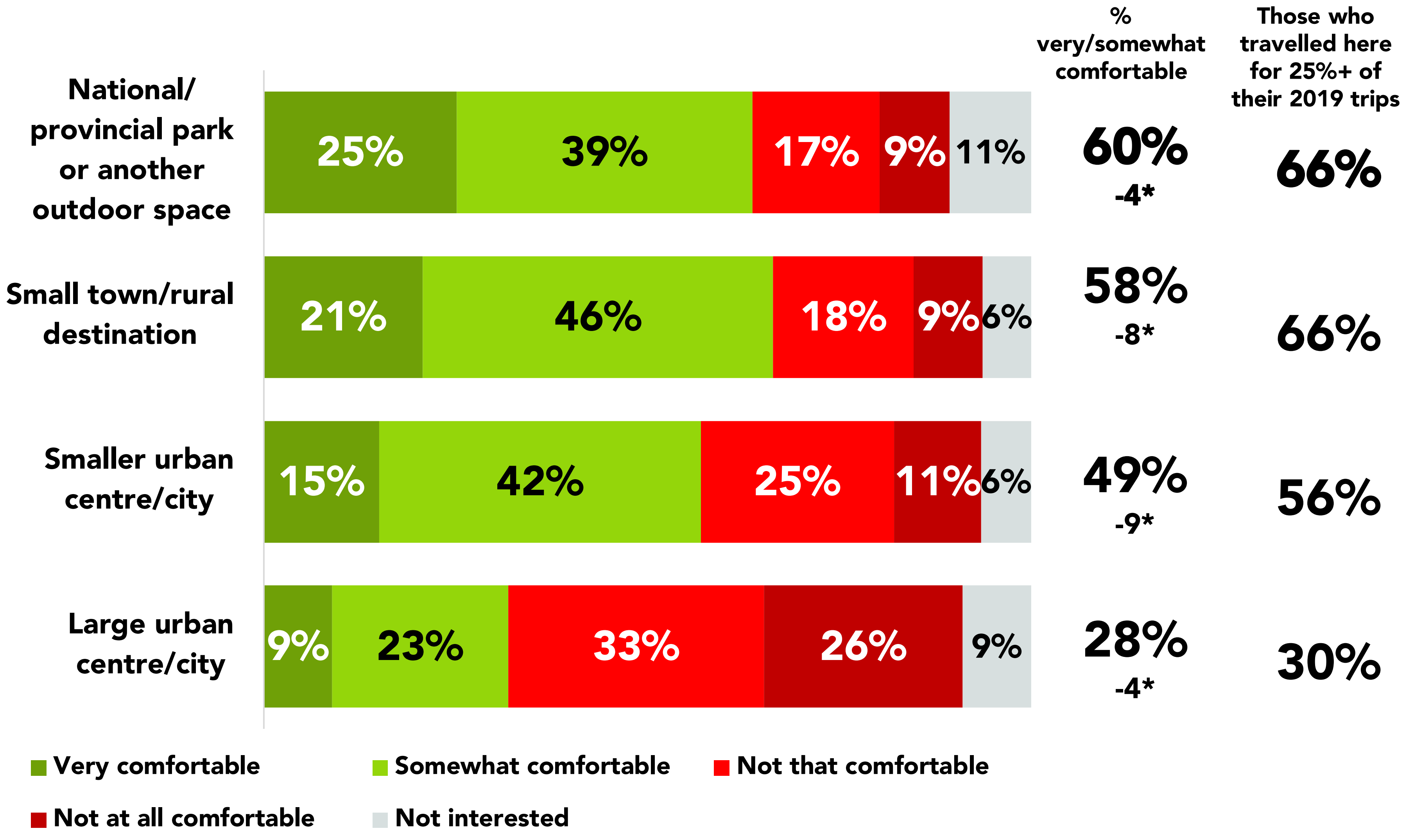
Ontarians are most comfortable with shorter trips within Ontario this winter.

Likelihood of taking any kind of trip is higher among those who took the same kind of trip last summer (in particular for day trippers and those who usually take a week + vacation).

During the next 6 months, 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 *compared to Wave 1

ABACUS DATA

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, except for in large urban centres/cities.

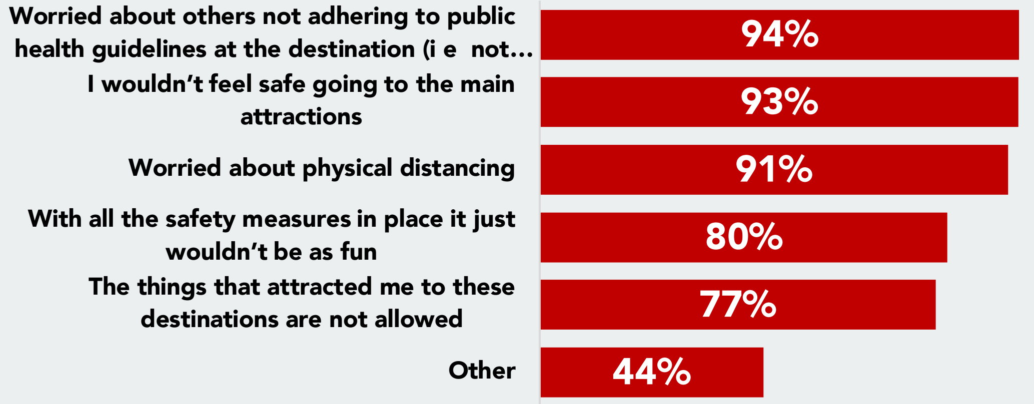
Even among those who travel to large urban centres for 50% or more of their 2019 trips, only 28% are comfortable travelling to an urban centre in the next 6 months.

ABACUS DATA

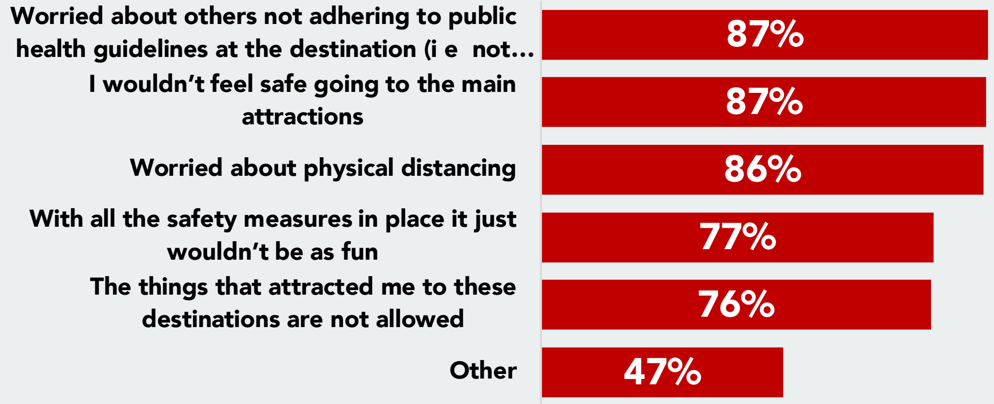
During the next 6 months, how comfortable would you be taking a trip to a… *compared to Wave 1

REASONS FOR DISCOMFORT

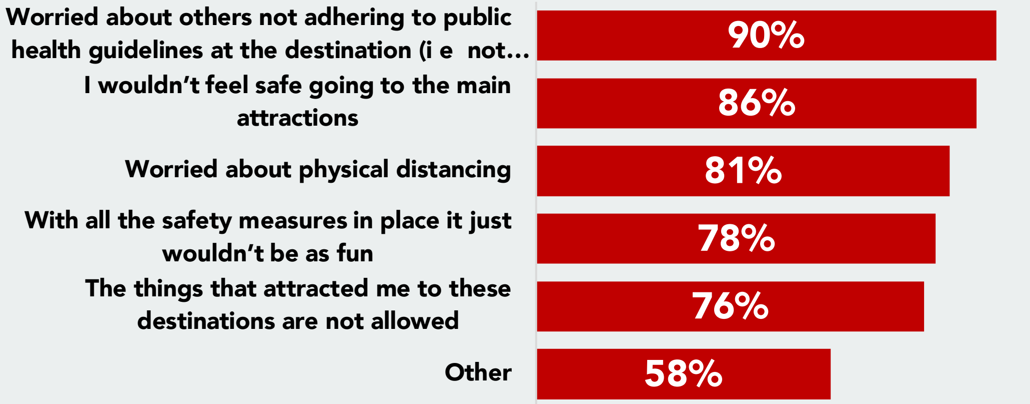
Why might you be uncomfortable travelling to a large urban centre/city?
**among those who travelled here for 25%+ of their winter trips last year*



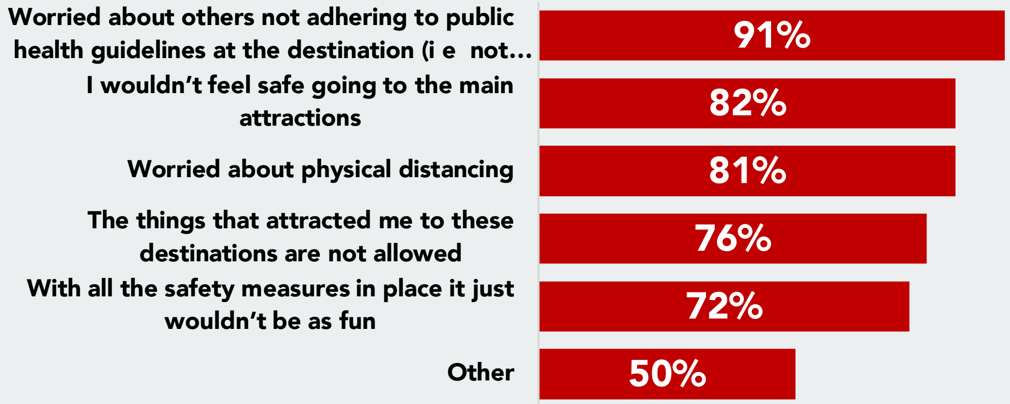
Why might you be uncomfortable travelling to a small urban centre/city?
**among those who travelled here for 25%+ of their winter trips last year*



Why might you be uncomfortable travelling to a small town/rural destination?
**among those who travelled here for 25%+ of their winter trips last year*



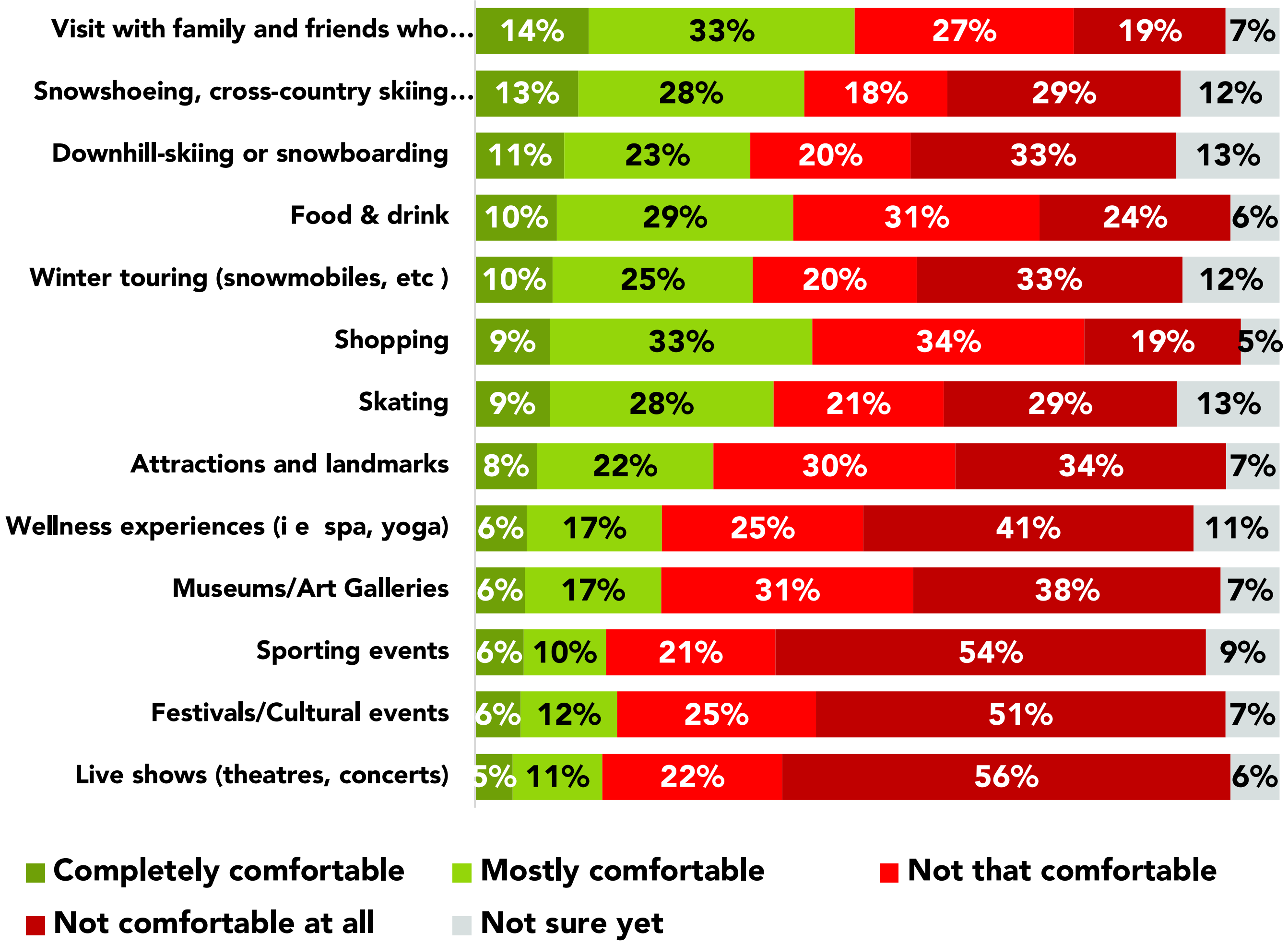
Why might you be uncomfortable travelling to an outdoor space/park?
**among those who travelled here for 25%+ of their winter trips last year*



ABACUS DATA

During the next 6 months, how comfortable would you be taking a trip to a… *compared to Wave 1

ACTIVITIES: SMALLER GROUPS, MORE SPACE



Activity	% completely/ mostly comfortable	Those that love to do this activity
Visit with family and friends who…	47%	56%
Snowshoeing, cross-country skiing…	41%	76%
Downhill-skiing or snowboarding	34%	73%
Food & drink	40%	47%
Winter touring (snowmobiles, etc)	35%	64%
Shopping	42%	50%
Skating	37%	69%
Attractions and landmarks	30%	51%
Wellness experiences (i e spa, yoga)	23%	54%
Museums/Art Galleries	23%	48%
Sporting events	16%	30%
Festivals/Cultural events	18%	28%
Live shows (theatres, concerts)	16%	22%

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 (shopping is the one indoor activity that seems to meet this criteria).

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:

- Food and drink
- Museums/Galleries
- Festivals/Cultural events
- Sporting events
- Live shows

During the upcoming winter season, to what extent will you feel comfortable, if at all, doing the following activities

ABACUS DATA

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
FOOD & DRINK	• VISITING FAMILY AND FRIENDS	47%
MUSEUMS/GALLERIES	• SNOWSHOEING, CROSS-COUNTRY SKIING OR WINTER HIKING • SHOPPING	52% 51%
FESTIVALS/CULTURAL EVENTS	• SKATING • DOWNHILL-SKIING OR SNOWBOARDING • SNOWSHOEING, CROSS-COUNTRY SKIING OR WINTER HIKING • ATTRACTIONS AND LANDMARKS	43% 43% 51% 41%
SPORTING EVENTS	• SKATING • DOWNHILL-SKIING OR SNOWBOARDING • SNOWSHOEING, CROSS-COUNTRY SKIING OR WINTER HIKING • FOOD & DRINK	51% 48% 51% 53%
LIVE SHOWS	• FOOD AND DRINK • SHOPPING • DOWNHILL SKIING/SNOWBOARDING • SKATING	48% 46% 41% 42%

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

ABACUS DATA

$ TRIP SPEND PROFILES

	TAKE THE SAME KIND OF TRIP THIS WINTER? % ALREADY BOOKED/CERTAIN/LIKELY TO	COMFORTABLE WITH DENSITY?	WILL MOST LIKELY BE DOING…
ECONOMY OVERNIGHTERS	68% DAY TRIP (+9) 47% OVERNIGHT TRIP (+6)	MORE COMFORTABLE WITH SMALL TOWNS THAN AVERAGE	NO MORE COMFORTABLE THAN AVERAGE WITH ACTIVITIES LIKE MOST, THEY ARE MOST COMFORTABLE WITH SHOPPING, VISITING WITH FAM/FRIENDS, FOOD AND DRINK, SNOWSHOEING/HIKING AND LANDMARKS
PREMIUM OVERNIGHTERS	68% DAY TRIP (+4) 44% OVERNIGHT TRIP (+3)	NO MORE COMFORTABLE THAN AVERAGE	MOST COMFORTABLE WITH DOWNHILL-SKIING, SNOWSHOEING/HIKING, VISITING WITH FAMILY AND FRIENDS ATTRACTIONS & LANDMARKS AND FOOD & DRINK (MORE THAN AV)
ECONOMY WEEKENDERS	WEEKEND TRIP 57% (+16)	MORE COMFORTABLE THAN AVERAGE IN LARGE AND SMALL URBAN CENTRES, AND SMALL TOWNS/RURAL DESTINATIONS	MOST COMFORTABLE VISITING FAM/FRIENDS, SHOPPING (MUCH MORE THAN AV), WELLNESS EXPERIENCES, FOOD AND DRINK, LANDMARKS, AND OUTDOOR ACTIVITIES LIKE SKATING, SKIING AND HIKING
PREMIUM WEEKENDERS	WEEKEND TRIP 53% (+12)	NO MORE COMFORTABLE THAN AVERAGE	NO MORE COMFORTABLE THAN AVERAGE WITH ACTIVITIES MOST COMFORTABLE WITH VISITING FAMILY/FRIENDS, FOOD/DRINK
ECONOMY WEEK+	WEEK LONG 52% (+26)	MUCH MORE COMFORTABLE WITH URBAN CENTRES, SMALL TOWNS PARKS	MOST COMFORTABLE WITH ALL OUTDOOR ACTIVITIES, MUSEUMS/GALLERIES, LANDMARKS, LIVE SHOWS, FOOD AND DRINK, WELLNESS EXPERIENCES AND VISITING FAM/FRIENDS
PREMIUM WEEK+	WEEK LONG 59% (+18)	NO MORE COMFORTABLE THAN AVERAGE	MOST COMFORTABLE WITH SNOWSHOEING, OUTDOOR HIKES, SKIING

+/- FROM AVERAGE

LIFE STAGE PROFILES

	WHAT KIND OF TRIP THIS WINTER? % ALREADY BOOKED/CERTAIN/LIKELY TO	COMFORTABLE WITH DENSITY?	WILL MOST LIKELY BE DOING...
YOUNG URBANITES	MORE LIKELY TO TAKE A WEEK-LONG TRIP 35% (+9)	NO MORE OR LESS COMFORTABLE THAN AVERAGE WITH DIFFERENT DENSITIES	MOST COMFORTABLE WITH VISITING FAM/FRIENDS, FOOD AND DRINK, SKIING AND SNOWSHOEING/HIKING
PARENTS	MORE LIKELY TO TAKE A DAY TRIP 68% (+9) OVERNIGHT TRIPS (+11) WEEKEND TRIPS (+13) AND WEEK + VACATIONS 38% (+8)	MORE COMFORTABLE WITH URBAN DESTINATIONS (57% SMALL URBAN, 36% LARGE URBAN)	MOST COMFORTABLE WITH VISITING FAM/FRIENDS, SHOPPING, FOOD & DRINK, SNOWSHOEING AND WINTER HIKING
RETIREES	MUCH LESS LIKELY TO TAKE ANY KIND OF TRIPS 53% SAY THEY WOULD BOOK A DAY TRIP, BUT ONLY 28% SAY THEY WILL TAKE AN OVERNIGHT/WEEKEND TRIP AND 13% SAY THEY WILL TAKE A WEEK + VACATION	LESS COMFORTABLE WITH LARGE URBAN DESTINATIONS (18%)	MOST COMFORTABLE WITH VISITING FAM/FRIENDS, SHOPPING
SNOWBIRDS	NO MORE OR LESS LIKELY TO TAKE ANY KIND OF TRIP, DAY TRIPS ARE THE MOST LIKELY (56%)	LESS COMFORTABLE WITH LARGE URBAN DESTINATIONS, AND ALSO OUTDOOR DESTINATIONS	MOST COMFORTABLE VISITING FAM/FRIENDS, SHOPPING AND FOOD & DRINK

+/- FROM AVERAGE

COVID TRAVEL EXPECTATIONS

ABACUS DATA

COVID TRAVEL EXPECTATIONS

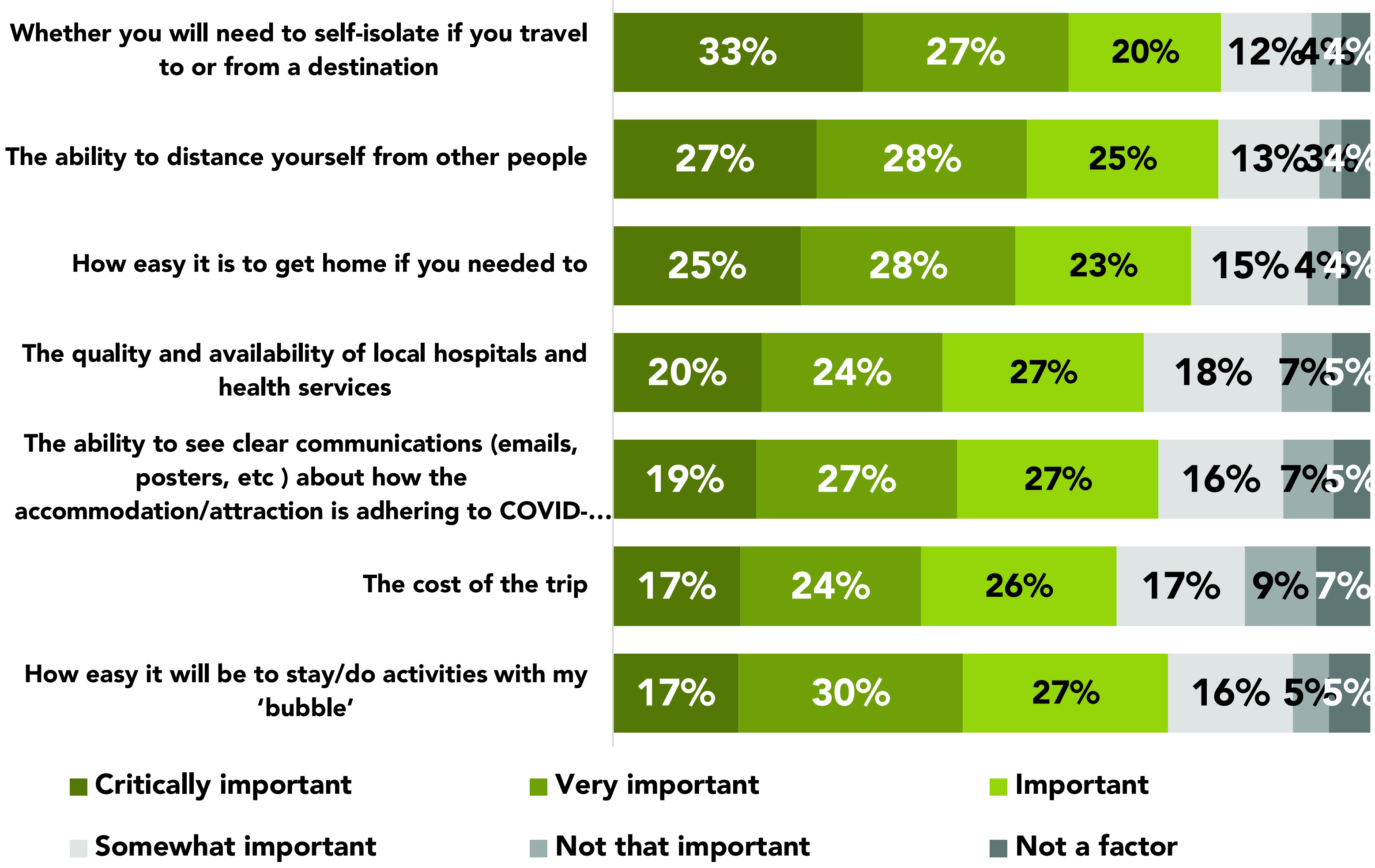
- Familiarity and playing it safe are still the themes of travel during this time. There is a greater propensity to choose destinations they were already planning on travelling to.
  - This doesn’t necessarily mean staying closer to home though. Ontarians are now slightly more likely to consider travelling to far-away destinations (up 5 pts).
- Self-isolation, physical distancing and ease of access to one’s home all remain important priorities for travellers. And still, travellers prefer small group activities, activities where they interact with travel companions only.
- Aside from the new health and safety aspects of travel, there are shifts to travel budgets as well. Not only is there greater competition between travel spend and home spend, there is also an interest in spending less when travelling. Around half say they are more likely to look at accommodations/activities that offer discounts.

COVID TRAVEL EXPECTATIONS

PHILOSOPHY ABOUT TRAVELLING DURING COVID-19	
TRAVEL READY "If I want to travel anytime soon, I'm going to have to get used to travelling during a pandemic, and I'm comfortable navigating this new travel reality "	• 38% say they will prioritize spending on travel, over household spending. • Expectations for COVID-19 specific measures in accommodations and activities are important for this group, but not as crucial (compared to those needing encouragement and the travel adverse). • This holds true for all but one (ways to easily travel and interact with your 'bubble'): travel ready respondents will still need information on this and some reassurance before they book. • More interested in travelling further, bucket-list travel, but like others, they aren't going to choose anything that wasn't already on their list.
NEEDS ENCOURAGEMENT "If I want to travel anytime soon, I'm going to have to get used to travelling during a pandemic, but I'm not very comfortable navigating this new travel reality "	• 30% say they will prioritize spending on travel, over household spending • Similar expectations in cost, cleanliness and the ability to distance themselves, self-isolation requirements, ease of returning home, quality healthcare, in that these are more of a concern for these two types of travellers, and less so for those who are travel ready.
TRAVEL ADVERSE "I don't see myself travelling during the pandemic for the foreseeable future "	• 15% say they will prioritize spending on travel, over household spending. • That accommodations adhere to public health guidelines is critical for 71% of this group (for comparison, its 44% for those who need encouragement and 38% for those who are travel ready. • For activities, its also critical for 71% (and 40% of those who need encouragement and 42% of those who are travel ready)

ABACUS DATA

TRAVEL EXPECTATIONS HEAVILY INFLUENCED BY COVID-19 EXPERIENCE



Critically/Very/ Important	
Wave 2	Wave 1
70%	65%
76%	73%
80%	75%
80%	76%
66%	65%
72%	70%
73%	--

Many factors are key to the decision-making process of travellers.

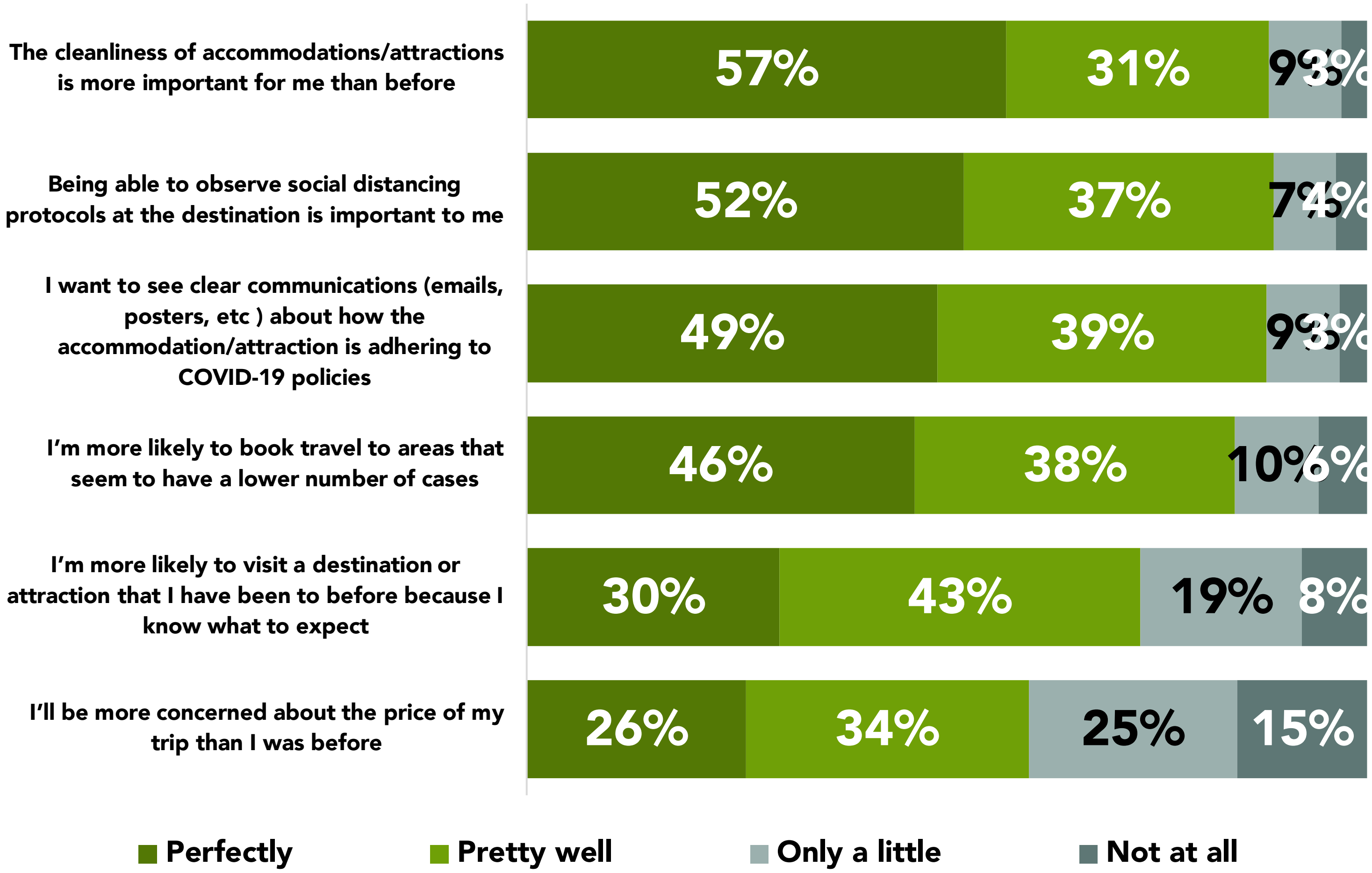
Self-isolation, physical distancing and ease of access to one's home all remain important priorities for travellers.

Cost, clear communications, and ease of staying in one's bubble are also important for at least two-thirds.

When deciding where to go and what to do for travel over the next 6 months, how important, if at all, will the following factors be in your decision making?

ABACUS DATA

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



Perfectly/Pretty well

Wave 2	Wave 1
88%	87%
89%	85%
88%	84%
84%	--
73%	71%
60%	57%

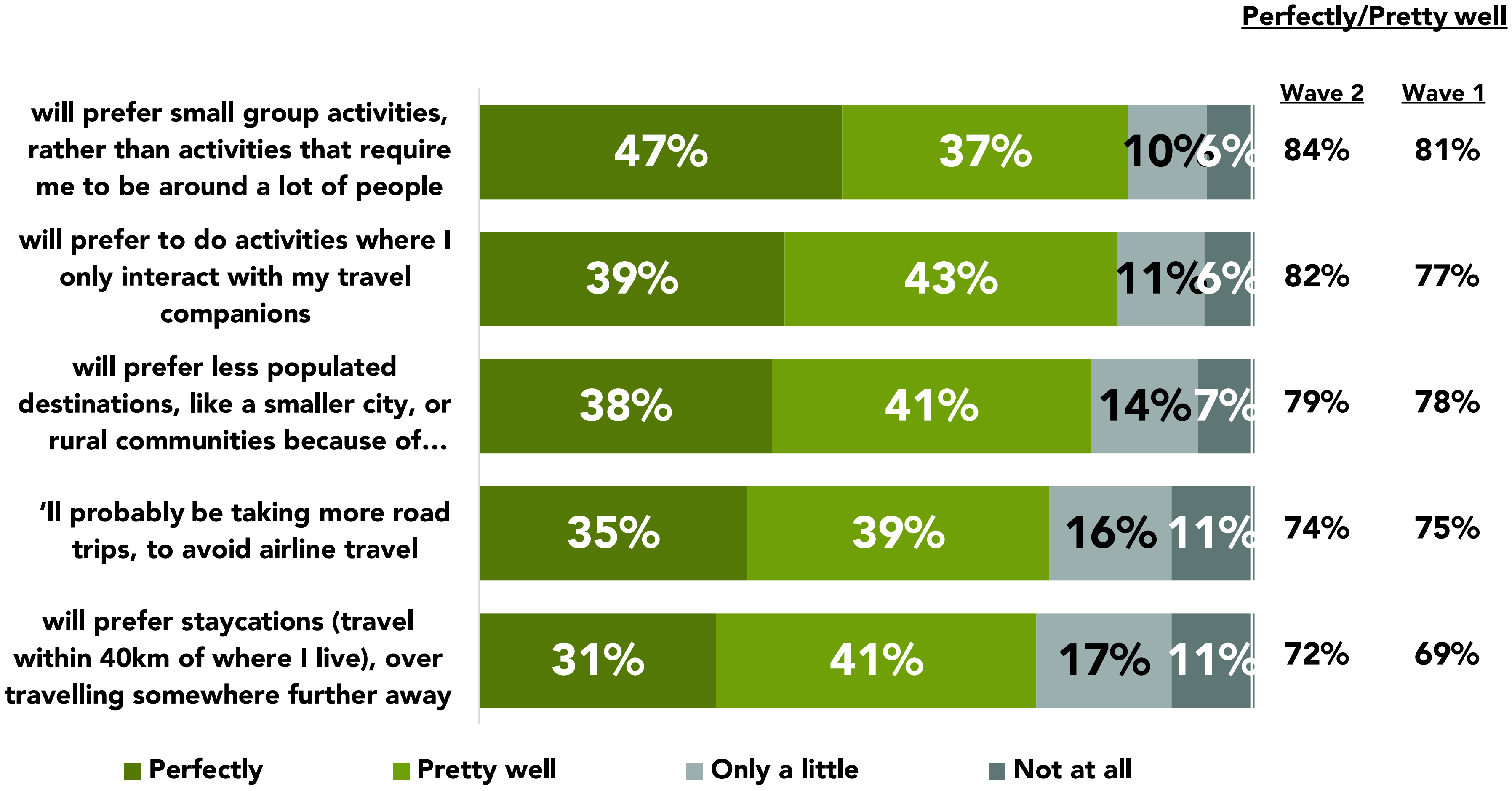
Like wave 1, travellers will need to be assured about cleanliness, social distancing.

Case count is also a measure that travellers are likely to be watching for.

And what about the following? Do they describe your thinking perfectly, pretty well, only a little, or not at all?

ABACUS DATA

TRAVEL IN THE NEXT 6 MONTHS REMAINS CLOSE BY, SMALLER GROUPS

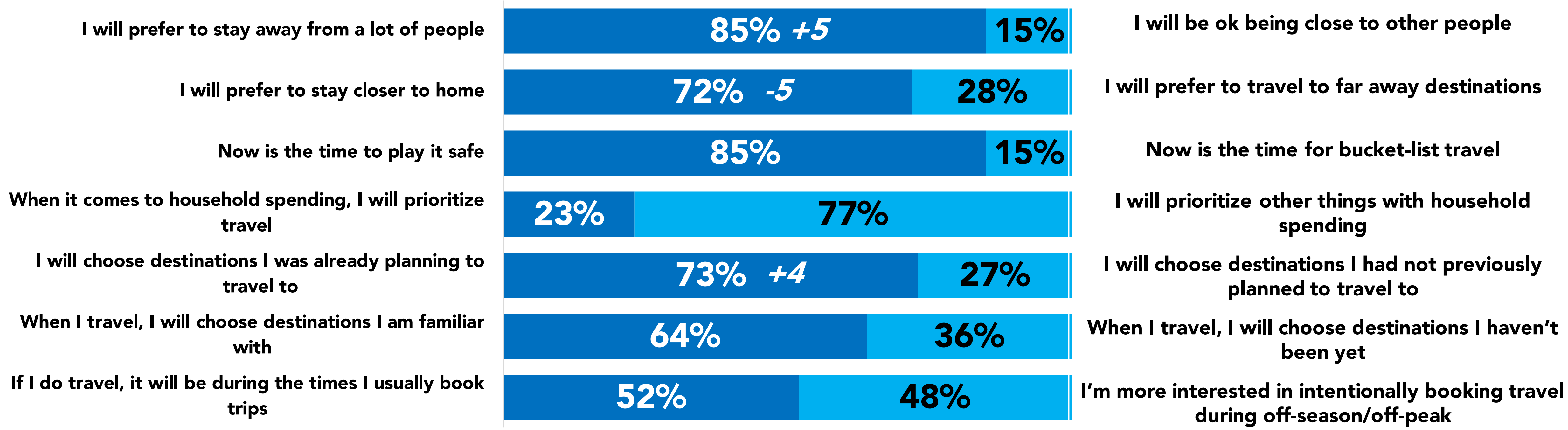


The importance of certain criteria for travel hasn't shifted much since wave 1. Still, travellers prefer small group activities, activities where they interact with travel companions only, and shorter distances to travel.

Thinking about travel for the next 6 months… do the following describe your thinking perfectly, pretty well, only a little, or not at all

ABACUS DATA

TRAVEL DECISIONS BASED ON MINIMIZING RISK



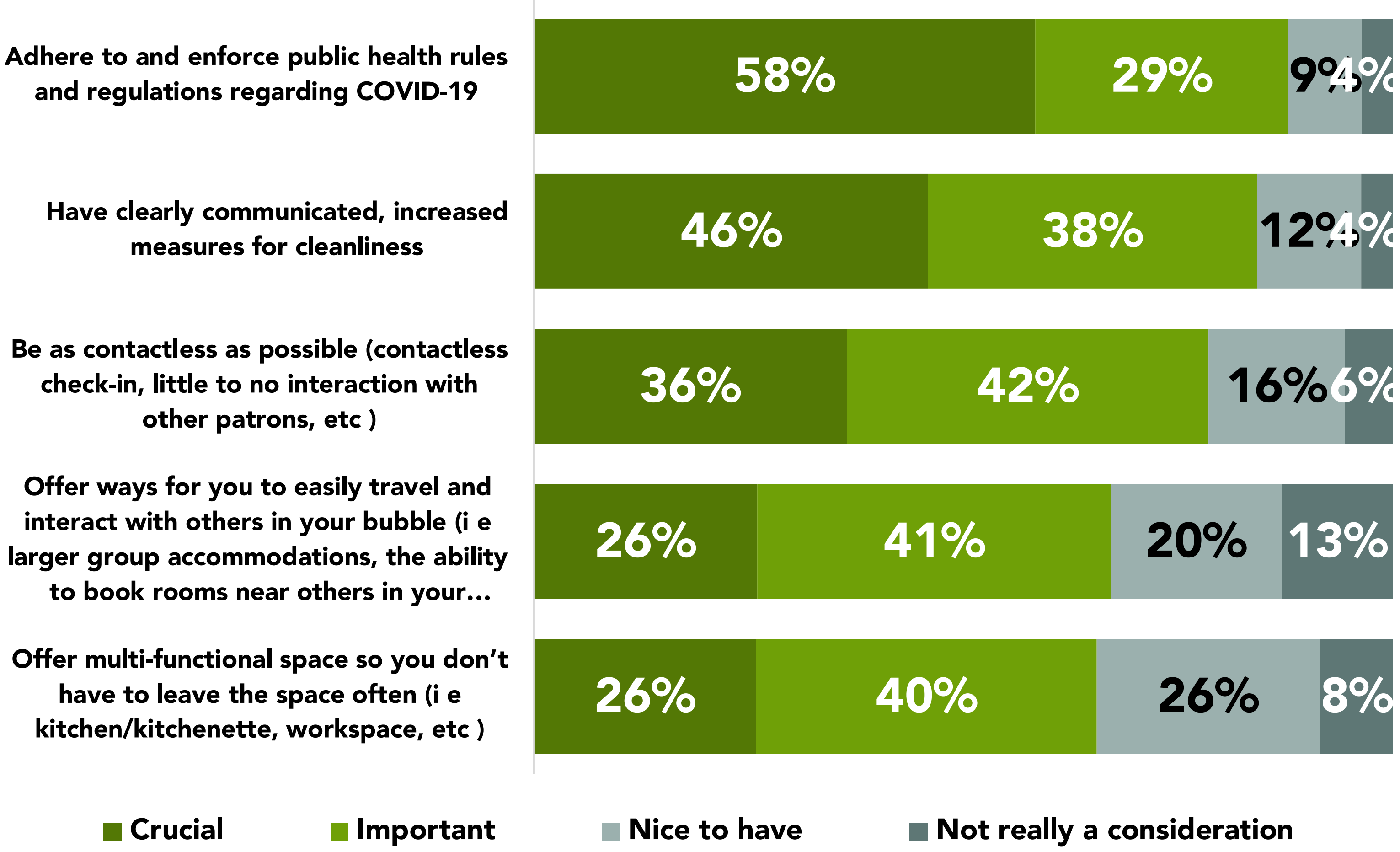
Playing it safe is still the theme of travel for this upcoming winter season.
85% will be doing their best to stay away from others, and familiar destinations are preferred.

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

Which of the following phrases best describes how you feel about travel over the next 6 months?

ABACUS DATA

BOOKING ACCOMMODATIONS: ADHERENCE TO PUBLIC GUIDELINES IS KEY



Above all else, accommodations should be adhering to public health rules and regulations.

Clearly communicated messages regarding cleaning procedures and the ability to have a low/no contact stay are also important.

And still, over half say offering ways for 'bubbles' to interact and multi-functional spaces is important, though less so than the other measures.

When choosing to book at an accommodation, how important is it that the accommodation…

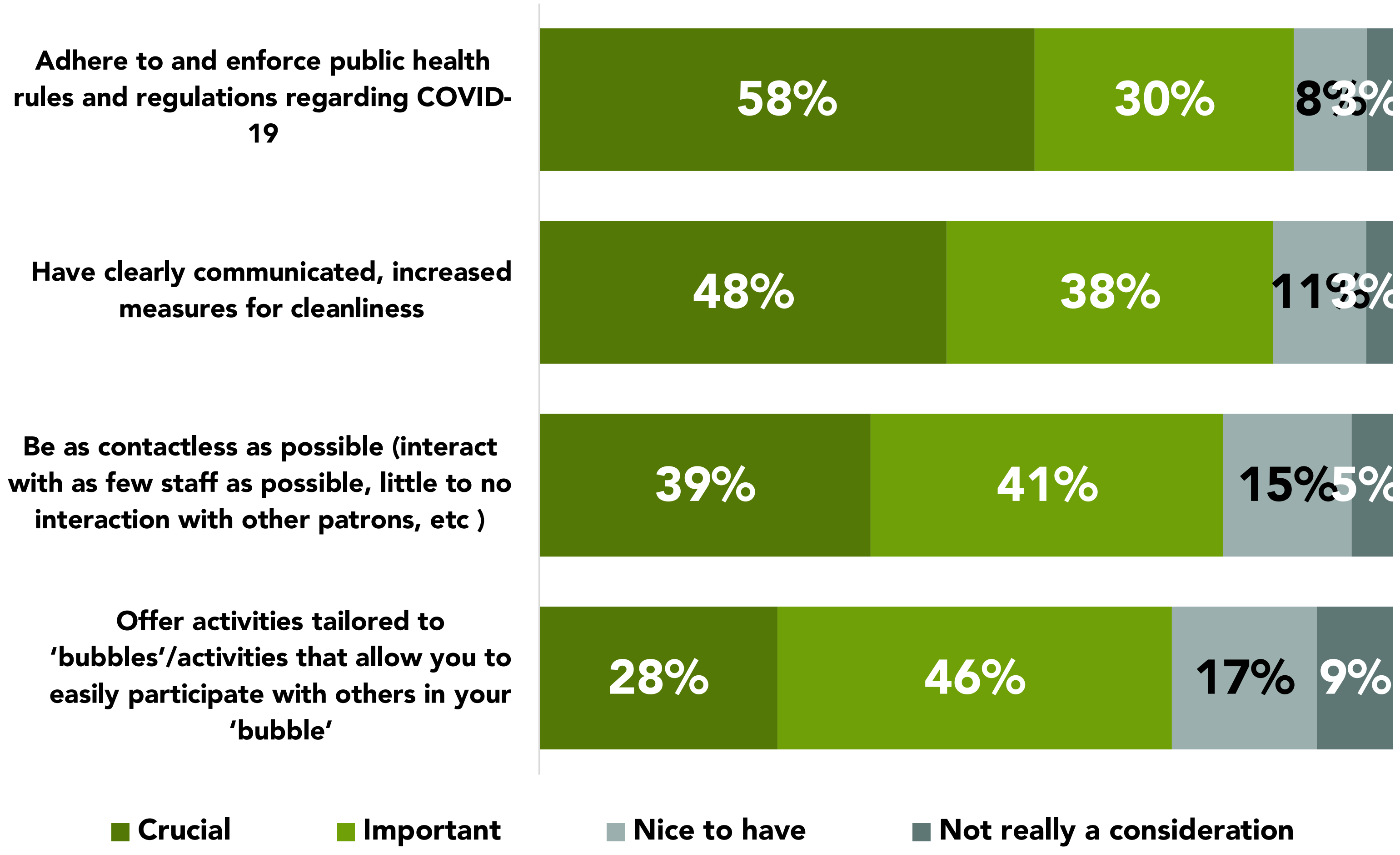
ABACUS DATA

BOOKING ACCOMMODATIONS

When choosing to book at an accommodation, how important is it that the accommodation…

ABACUS DATA

BOOKING ACTIVITIES: ADHERENCE AND INFO ON CLEANING PROTOCOLS ALSO IMPORTANT



When it comes to activities, the requirements are the same.

Nearly all want to know the accommodation has been adhering to public health guidelines, and have clearly communicated information on enhanced cleaning measures.

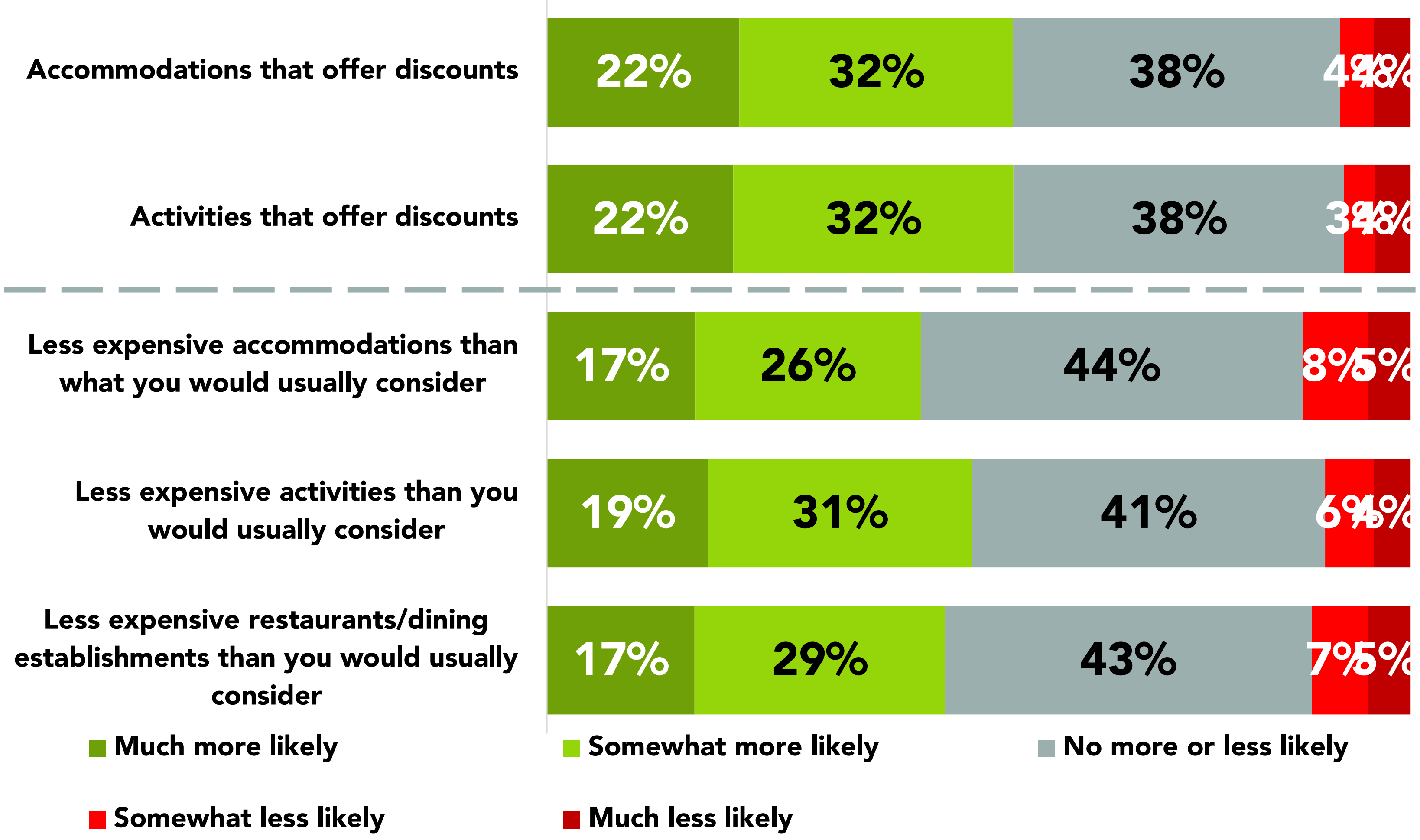
Contactless is also important or critical for 80% of travellers.

When choosing to book an activity, how important is it that the activities you choose

BOOKING ACTIVITIES

When choosing to book at an accommodation, how important is it that the accommodation…

IMPACTS TO BUDGET



About half are interested in accommodations and activities that offer discounts.

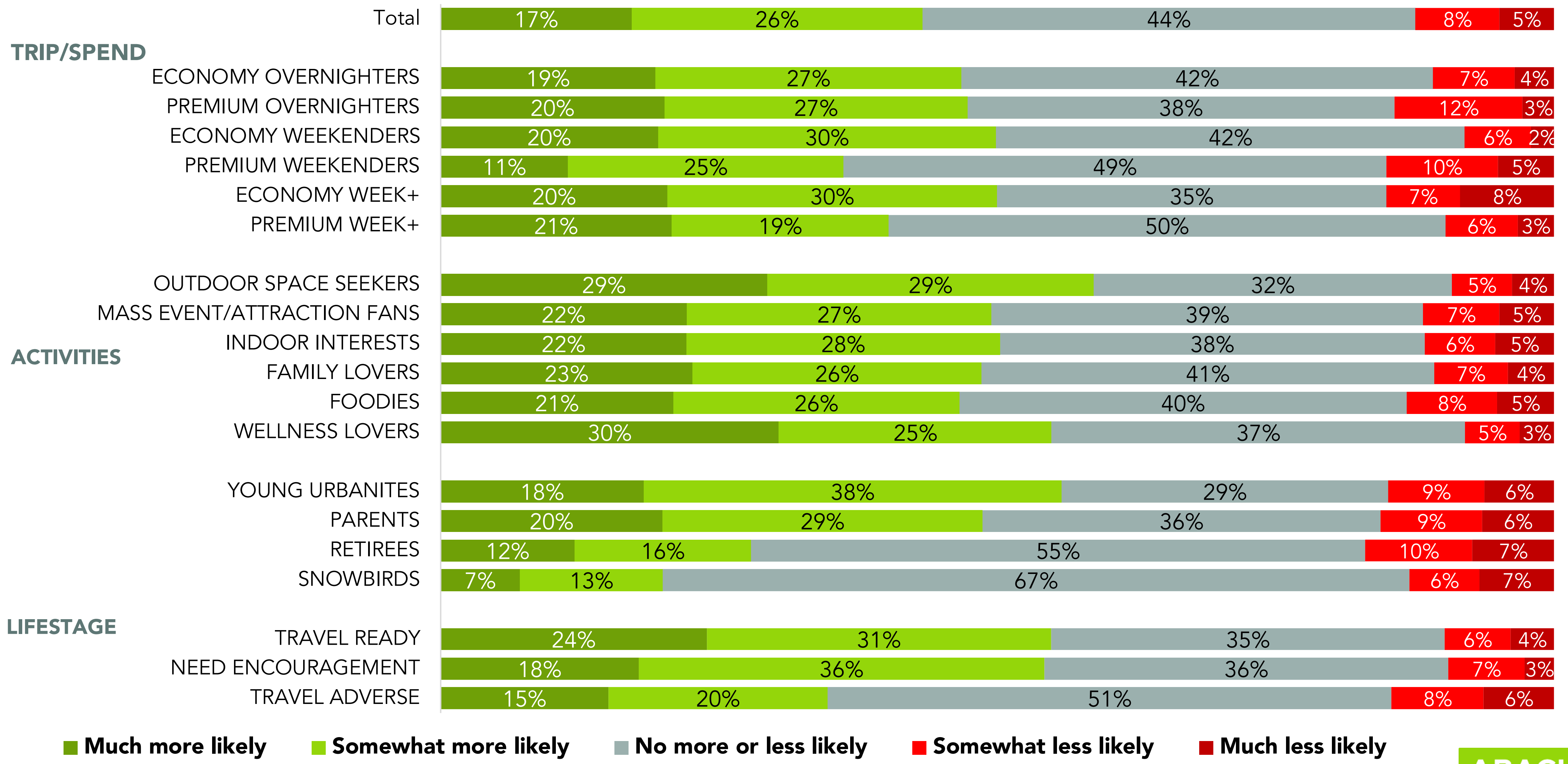
Many are very open to reducing their travel budgets when they can.

There is a good level of interest in less expensive accommodations, activities and restaurants/dining establishments.

COVID-19 has had an impact on the financial situation of many Canadians As a result of COVID-19 will you be more or less likely to choose the following when you travel

ABACUS DATA

LESS EXPENSIVE ACCOMMODATIONS



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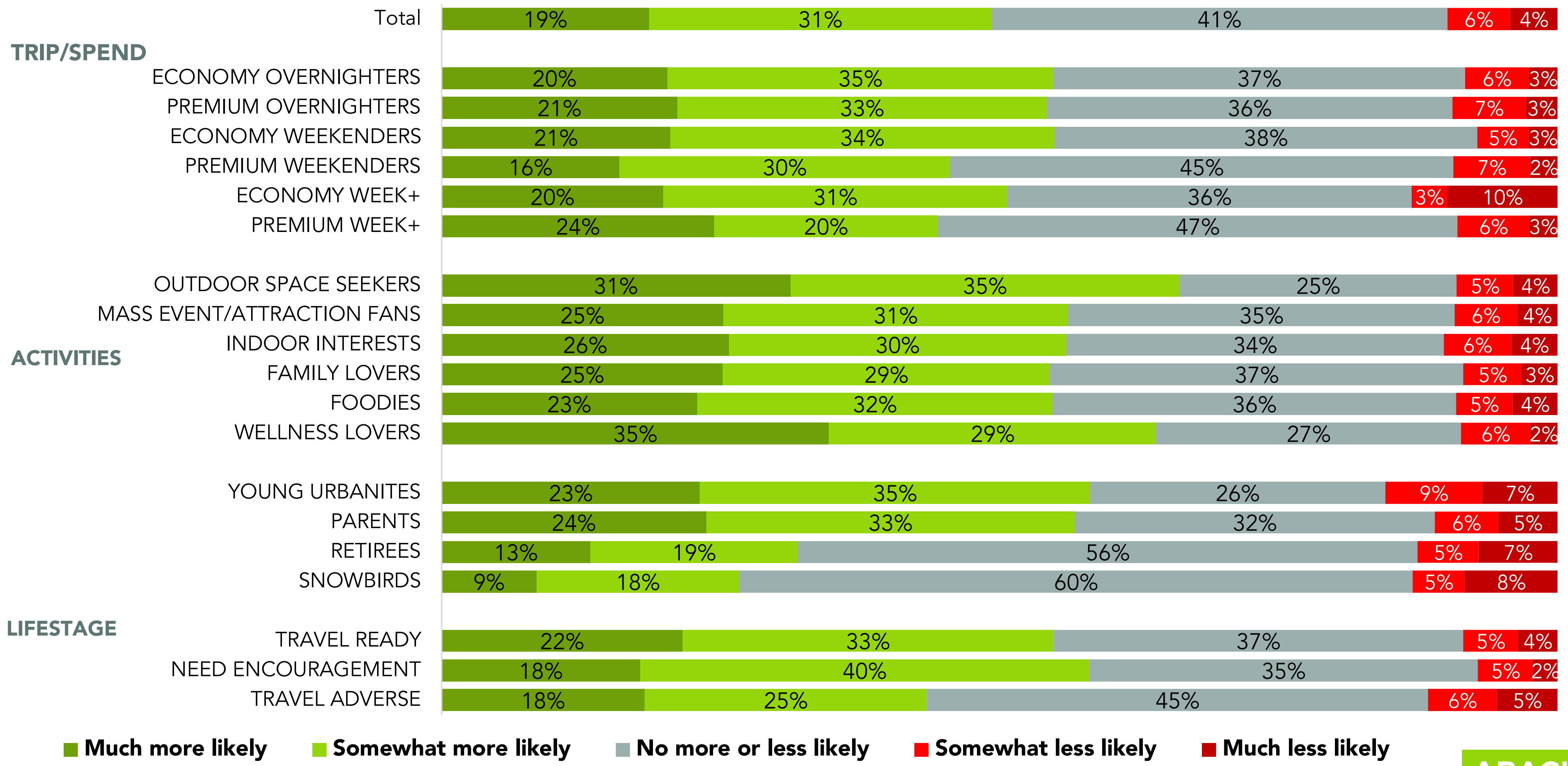
ABACUS DATA

LESS EXPENSIVE ACTIVITIES



COVID-19 has had an impact on the financial situation of many Canadians As a result of COVID-19 will you be more or less likely to choose the following when you travel

ABACUS DATA

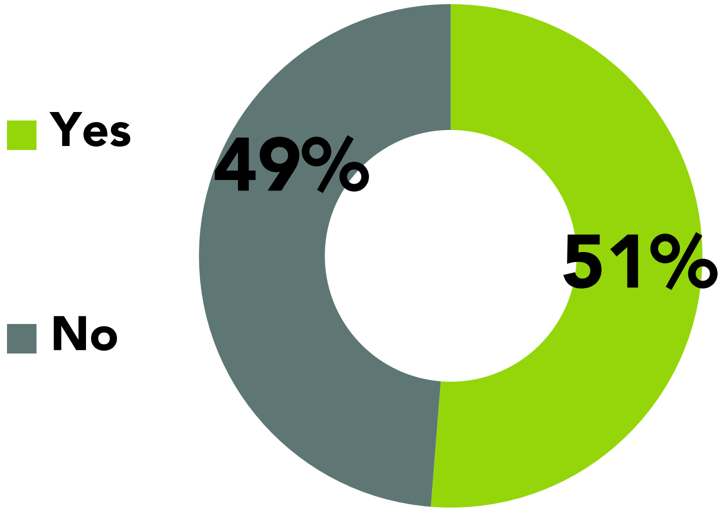
SUNNY DESTINATION TRAVELLERS

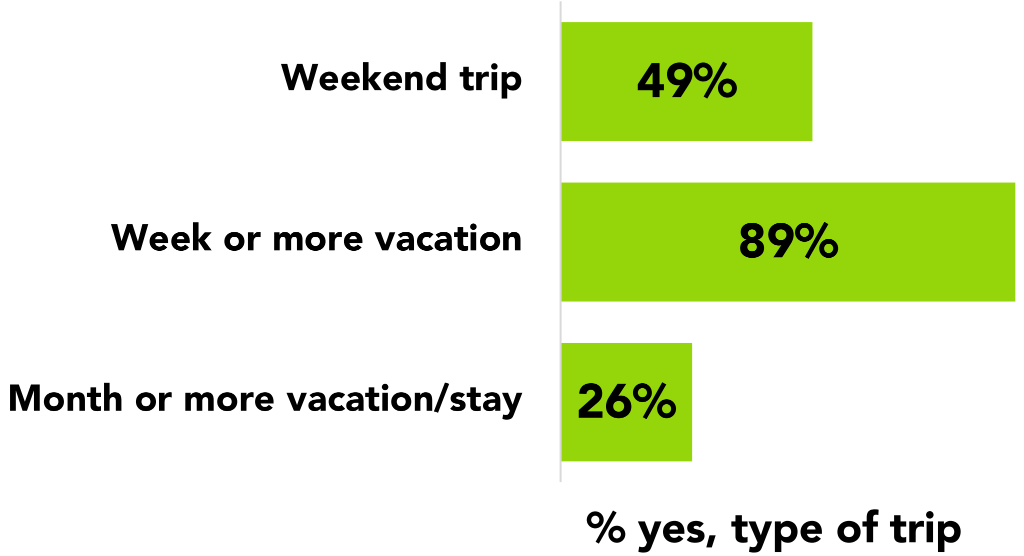
SUNNY DESTINATION TRAVELLERS

- Half of the sample can be considered a 'sunny destination traveller'. The most likely kind of trip for those who fall into this category? A week or more vacation (89%).
- Fully 16% intend to travel to a sunny destination for the same amount of time as usual, a shorter time, or both.
  - This behaviour is likely to be much more common among younger travellers, (23%) and parents (24%). And snowbirds (21%).
- Among this group, alternate travel options have some interest (56% say they would choose a sunny destination), but allocating money to spending at home is still more appealing (75% say they are likely to spend their travel funds on home investments instead)
  - Younger Ontarians and Parents are both most likely to say yes to both of these, suggesting they will have competing priorities.

AROUND HALF ARE SUNNY DESTINATION TRAVELLERS

During the past 3 years have you travelled to a sunny destination during the winter months?

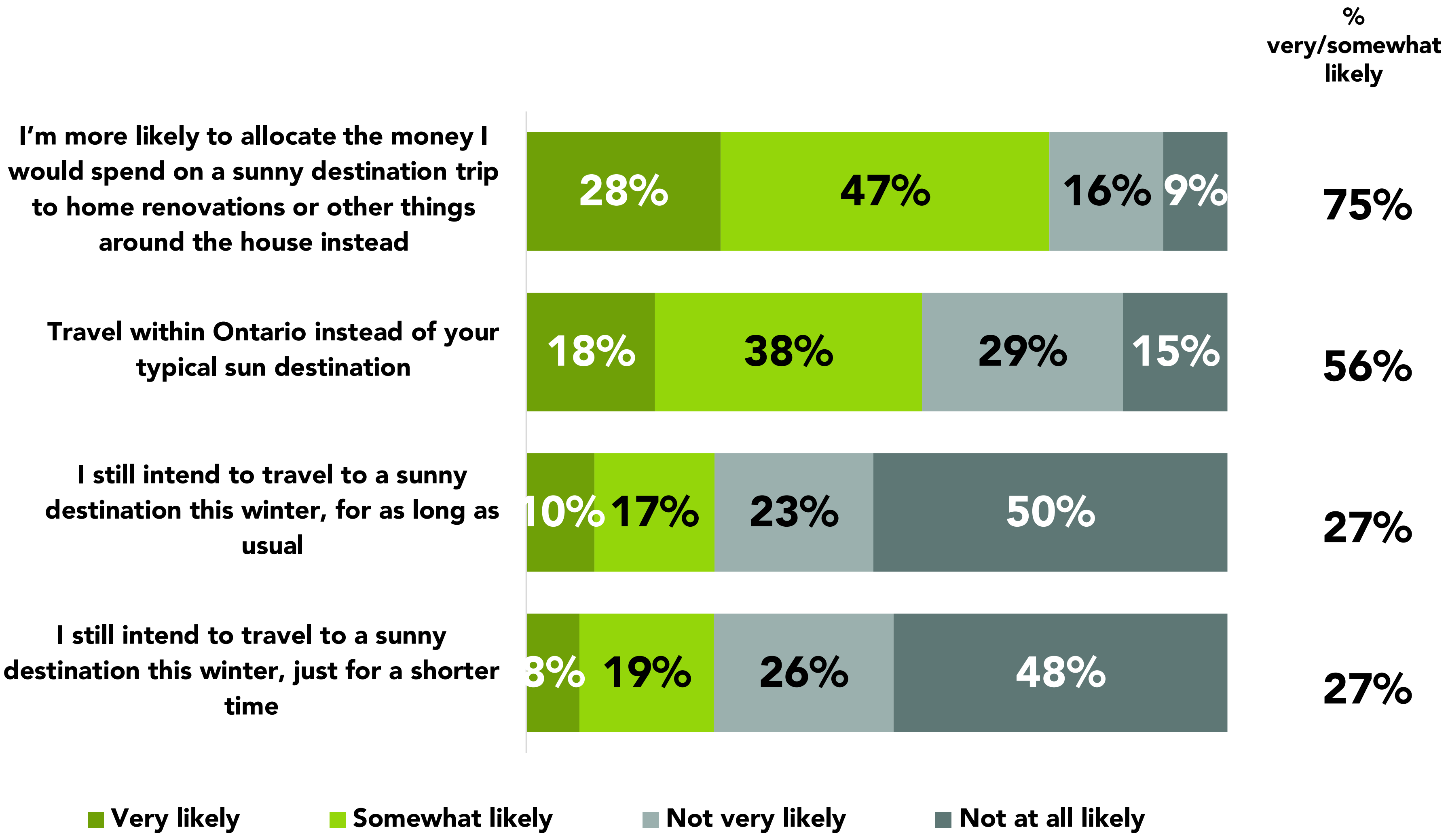




Half have taken a trip to a sunny destination during the winter months.

During the past 3 years prior to the COVID-19 pandemic, did you travel to a sunny destination during the winter months?

FEW PLAN TO KEEP THEIR USUAL PLANS, MORE WILL SPEND ON HOME OR LOCAL TRAVEL



Most are likely to be allocating their travel budget to spending in the home.

And half say they will be likely choosing an Ontario destination rather than their usual sunny destination.

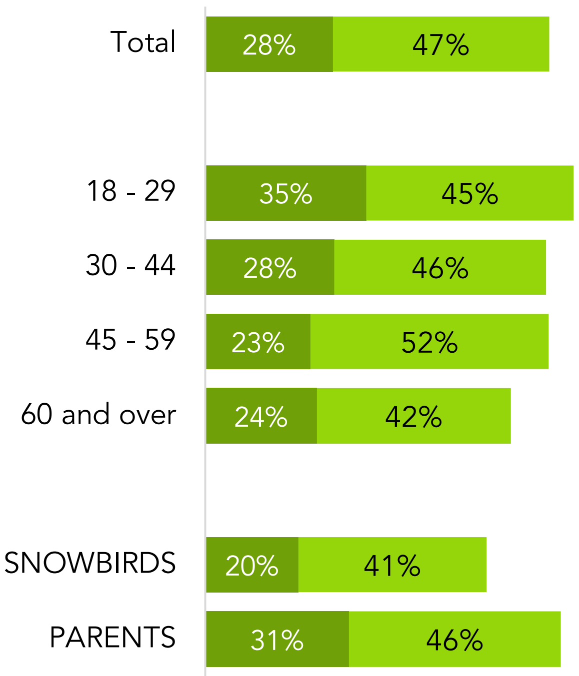
In total, 16% have intentions to make at least one trip to a sunny destination this winter, either for as long as usual, shorter or both.

ABACUS DATA

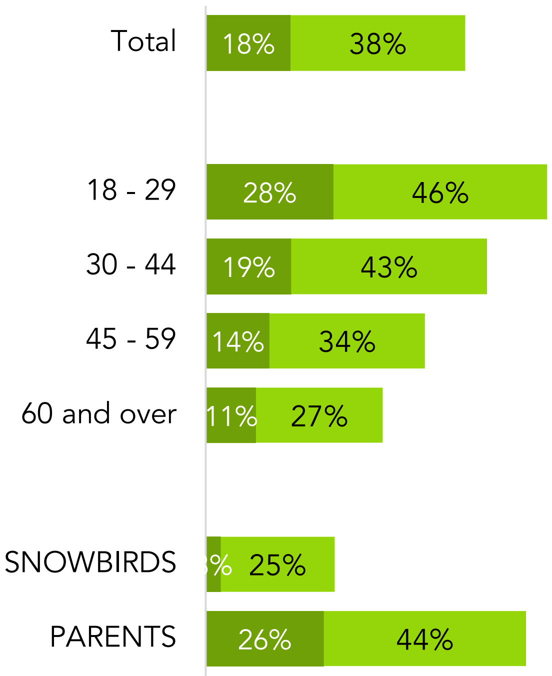
How likely are you to do the following…

TRAVEL THIS WINTER…

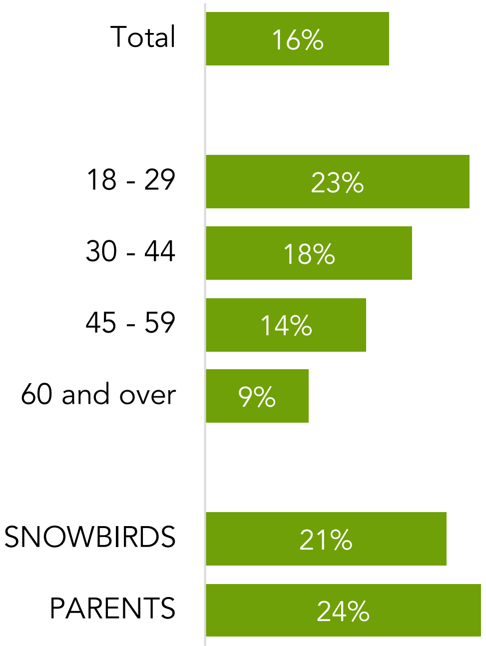
I'm more likely to allocate the money I would spend on a sunny destination trip to home renovations or other things around the house instead



Travel within Ontario instead of your typical sun destination



Those with intentions to travel to a sunny destination for a shorter, or usual amount of time



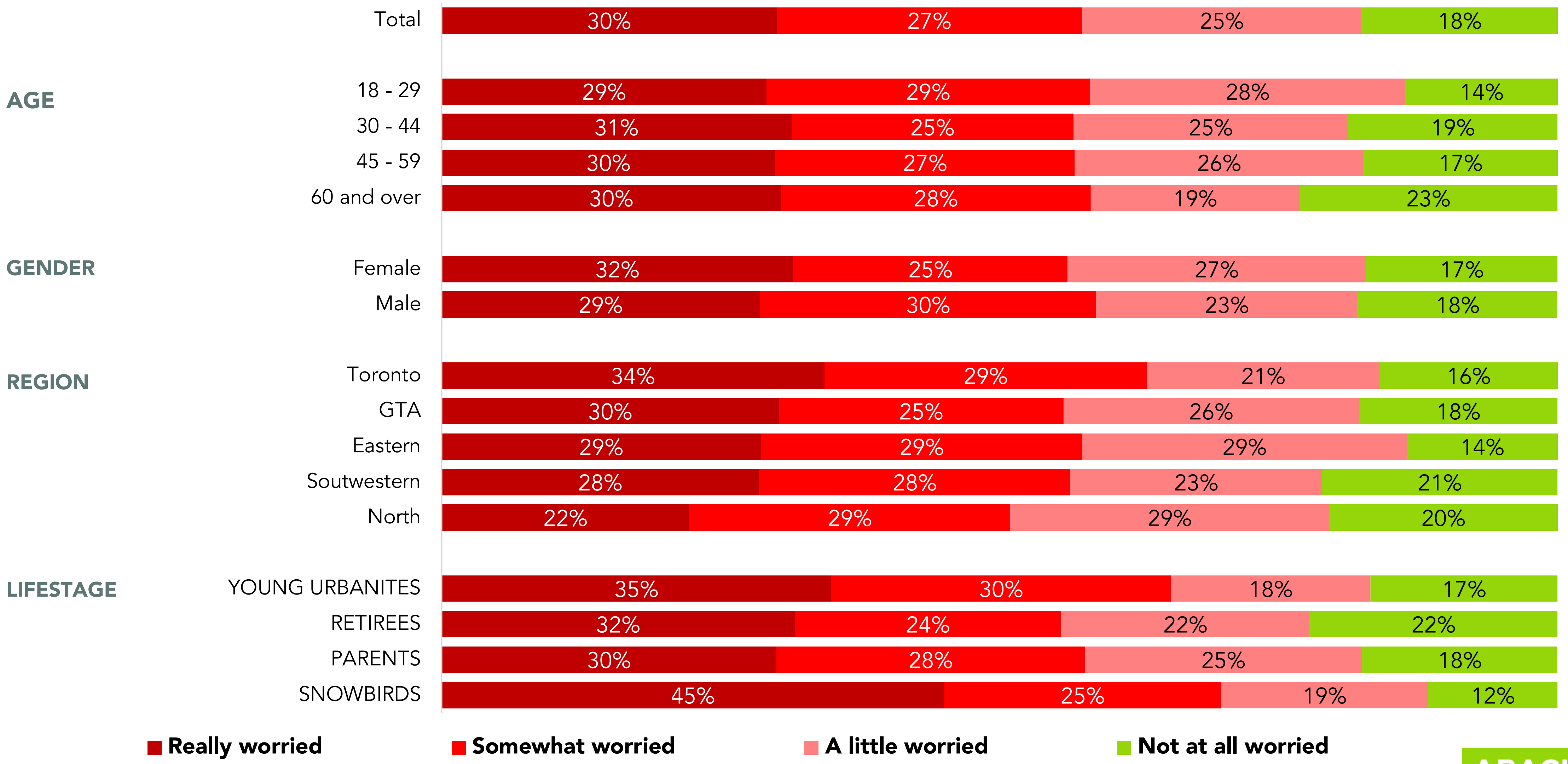
Young Ontarians are more likely to say they will be allocating money elsewhere, travelling in Ontario and keeping their same travel plans. While older Ontarians overall are apprehensive about making a trip south, 'snowbirds' are more eager, though most are still cautious.

How likely are you to do the following…

ABACUS DATA

APPENDIX

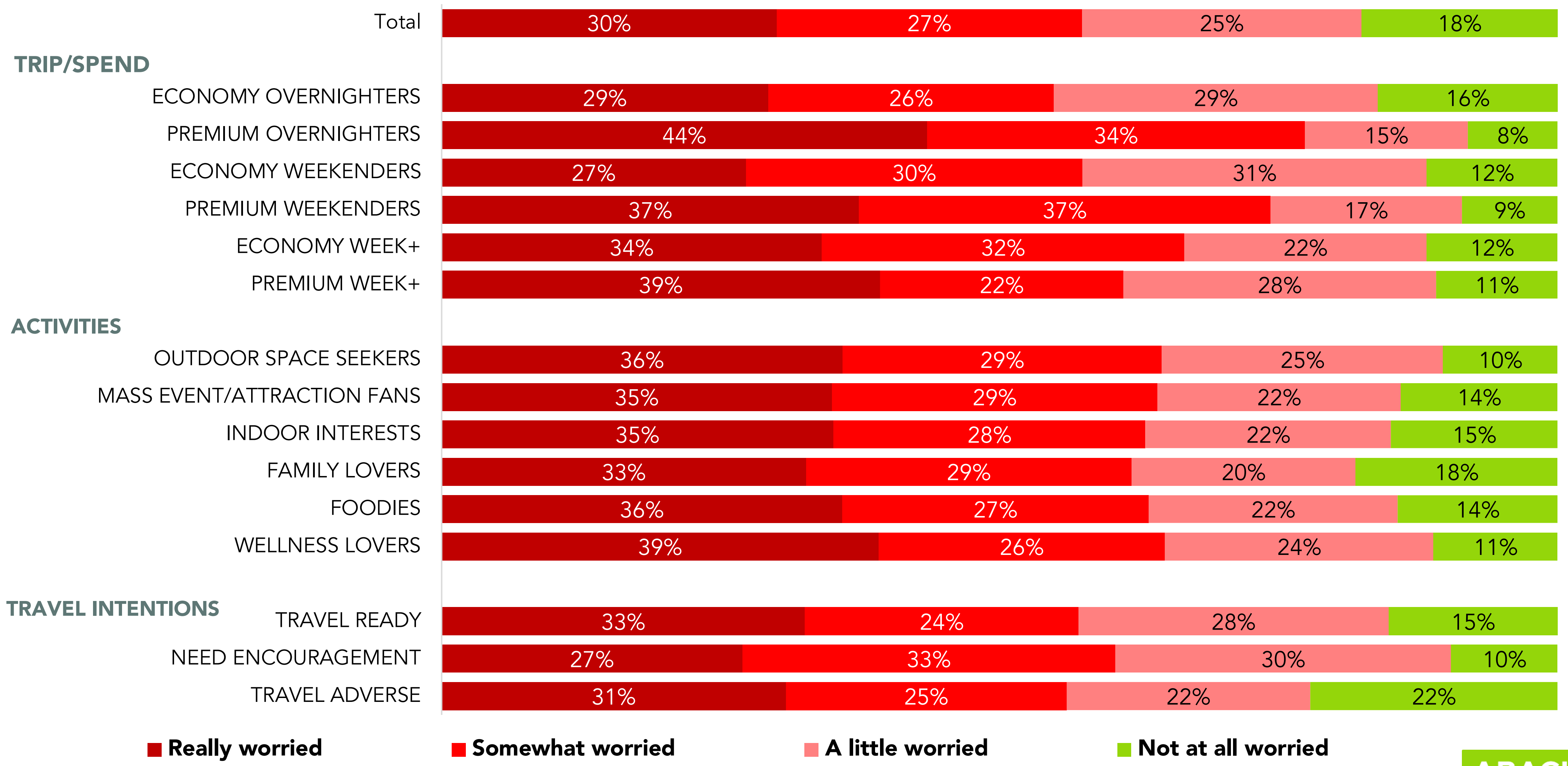
YOUR ABILITY TO TRAVEL



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

ABACUS DATA

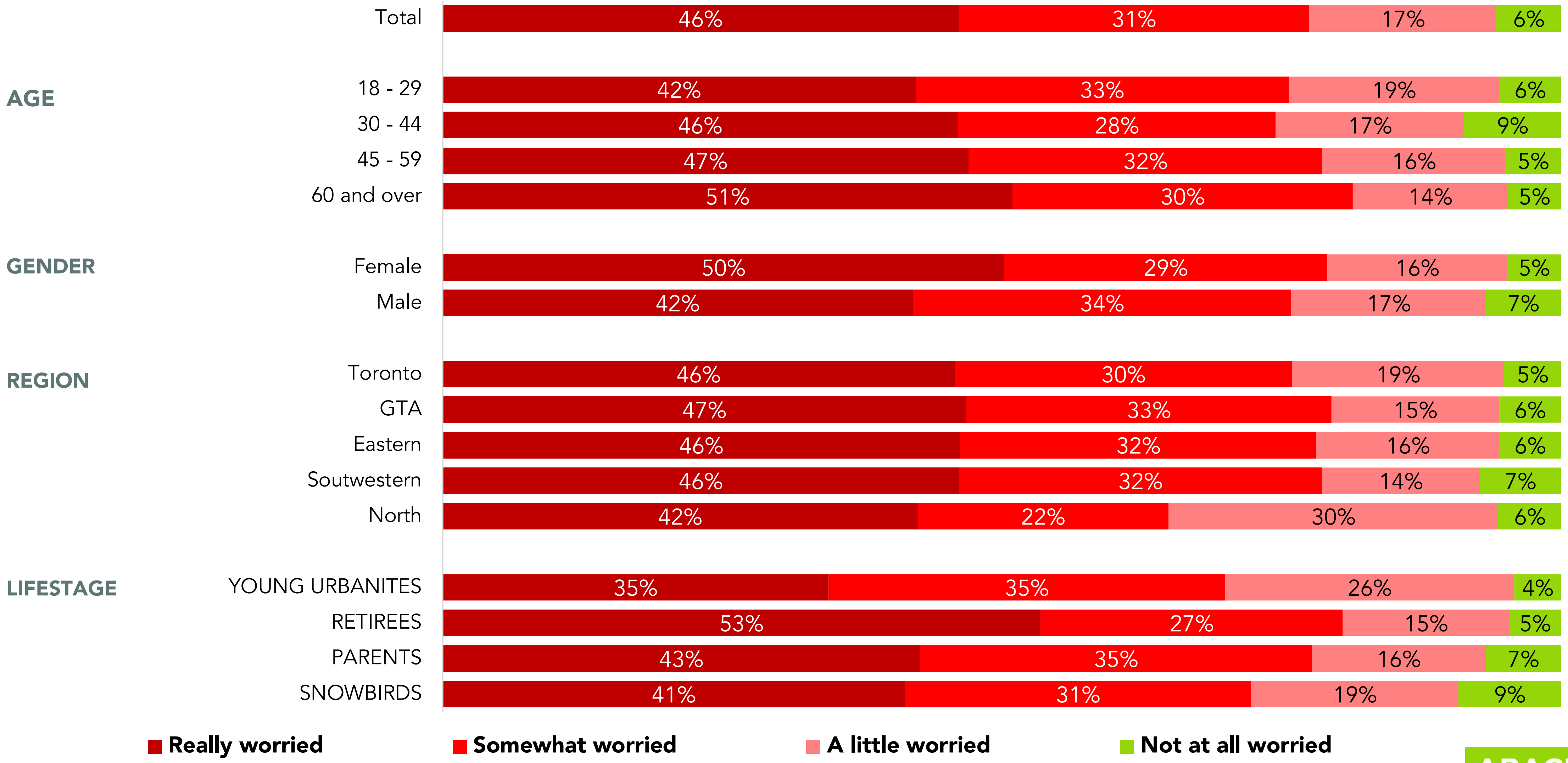
YOUR ABILITY TO TRAVEL



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

ABACUS DATA

ANOTHER SPIKE



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ABACUS DATA

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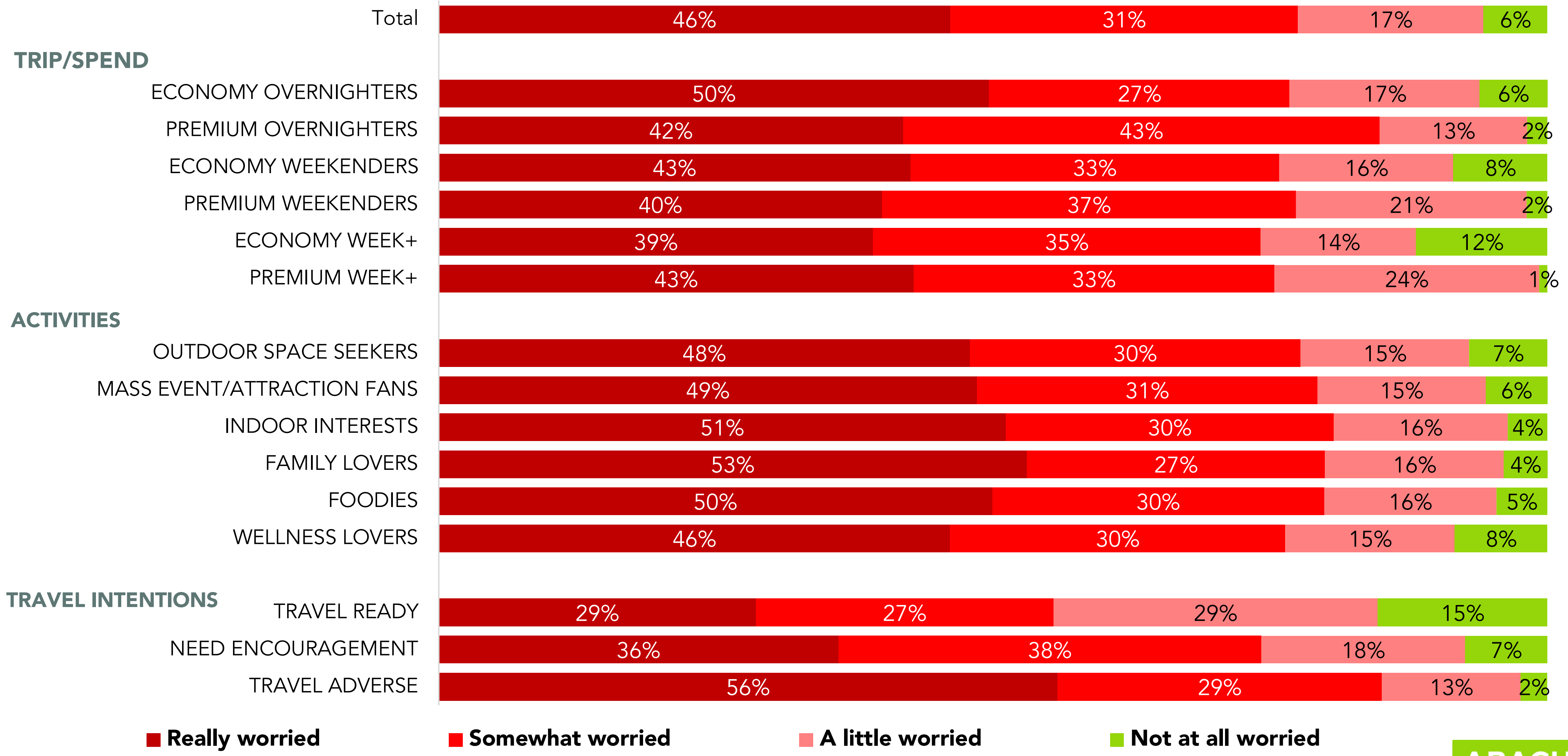
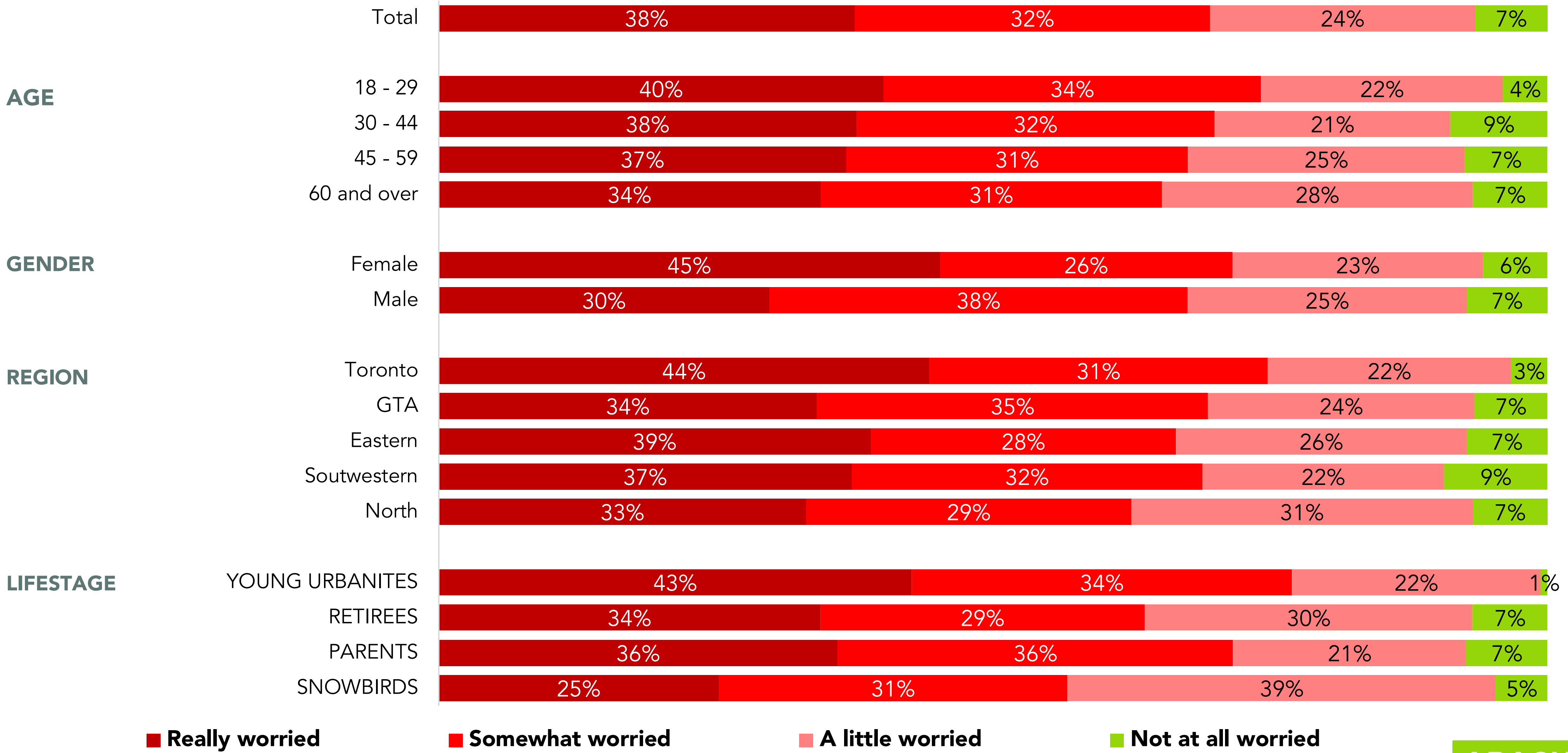


To what extent, if at all, are you worried about the following when it comes to the COVID-19 pandemic

ABACUS DATA

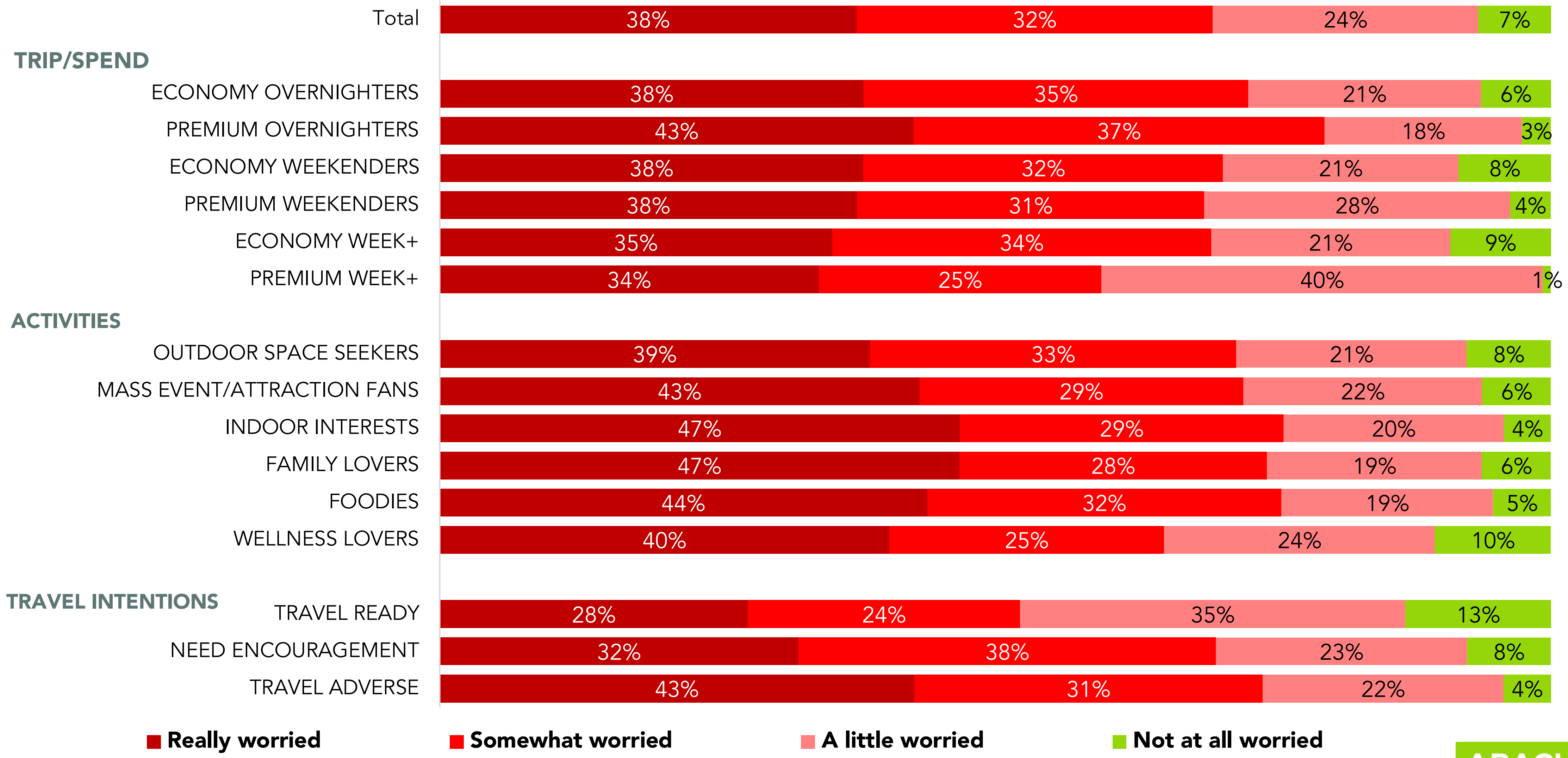
FAMILY MEMBER GETTING COVID-19



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

ABACUS DATA

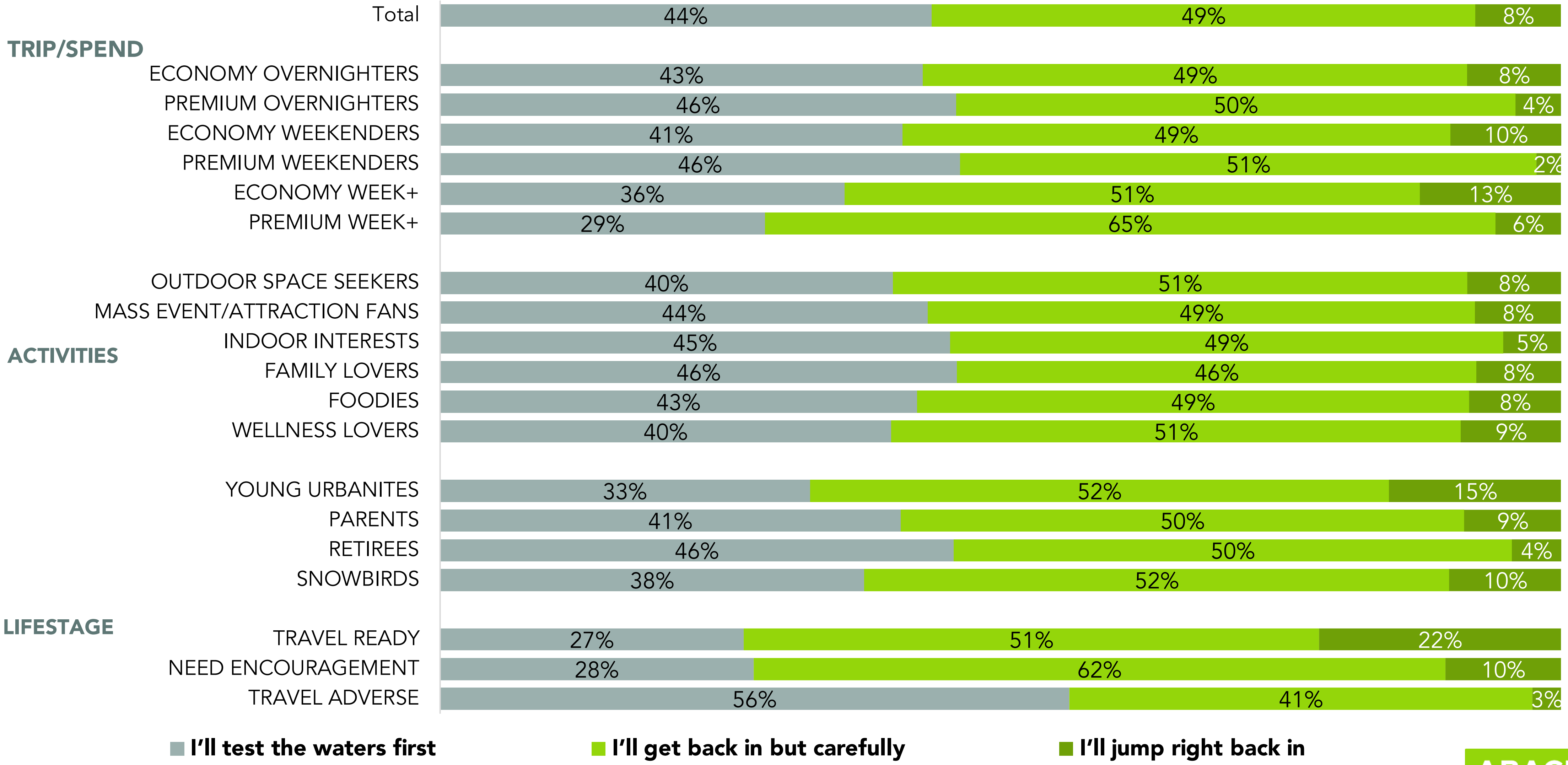
FAMILY MEMBER GETTING COVID-19



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

ABACUS DATA

TRAVEL COMFORT LEVEL



ABACUS DATA

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