

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



## 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.



#### **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

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#### WHAT'S CHANGED SINCE SUMMER 2020?

### <u>Worries about the pandemic are here to stay.</u>

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 **36%** More concerned about the budget in the winter **50%** More concerned about the health implications in the winter **30%** Less comfortable travelling in the summer overall **22%** More concerned about the budget in the winter **22%** 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.

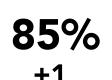
85% I will prefer to stay away from a lot of people +5

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



#### WHAT'S REMAINED THE SAME?

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



The cleanliness of accommodations/attractions is more important to me than before



+4

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



I want to see clear **88%** 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.

**23%** Completely/mostly comfortable enjoying museums and galleries.

**40%** Completely/mostly comfortable enjoying food & drink.

**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 49% I'll get back in but carefully 44% I'll test the waters first +2 +3-4



+/- compared to Wave 1

### WHAT ELSE DO WE KNOW ABOUT THE TRAVEL MENTALITY? <u>There isn't a wide-spread feeling of 'getting comfortable' with the</u> <u>pandemic.</u>

But not everyone has the same comfort level.

#### **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%

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 prepandemic 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 <u>get used to</u> 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.



I didn't travel as much as I usually do this past summer/fall 55% I have me than usual strongly /somewhat agree

I have more vacation days than usual to use before

Strongly /somewhat agree

41%

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.

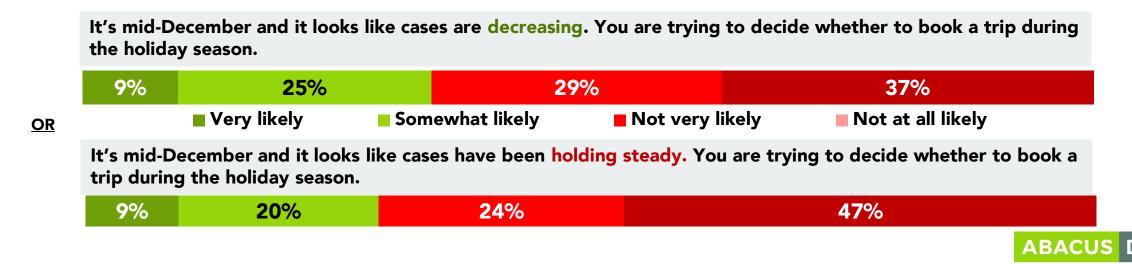


HOW DO TRAVELERS FEEL ABOUT WINTER 2020/2021 TRAVEL? One in three (36%) are comfortable travelling between now and March 2021.

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.



### 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.



## 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 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.



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.



# TRAVELER PROFILES



## 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	<b>29</b> %
PREMIUM WEEKENDERS	OVER \$4K	WEEKEND TRIP	<b>9</b> %
ECONOMY WEEK+	UNDER \$4K	WEEK LONG + TRIP	8%
PREMIUM WEEK+	OVER \$4K	WEEK LONG + TRIP	4%

#### LIFESTAGE PROFILES \*ONTARIO ONLY

			% OF SAMPLE		
YOUNG URBANITES	18-29 YEARS OLD	LIVE IN TORONTO (NOT GTA) OR URBAN OTTAWA	8%		
RETIREES	RE	RETIRED			
PARENTS	HAVE CHILDREN	HAVE CHILDREN UNDER 18 AT HOME			
SNOWBIRDS	RETIRED, AND SPEND A MO	2%			
			ADAGGS D		

#### **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 SKIIING 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**



## **OVERALL PERCEPTIONS OF THE COVID-19 PANDEMIC**

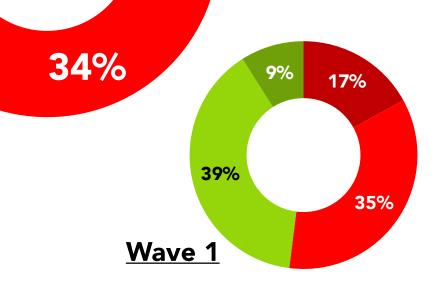
- Most travellers remain worried about the pandemic: 62% are worried about the pandemic- a ten-point increase since the last wave.
  - Those in the GTA and Toronto (where case counts are currently the highest) express the highest level of concern.
  - Older Ontarians and retirees are more concerned than 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.



## 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.



28%

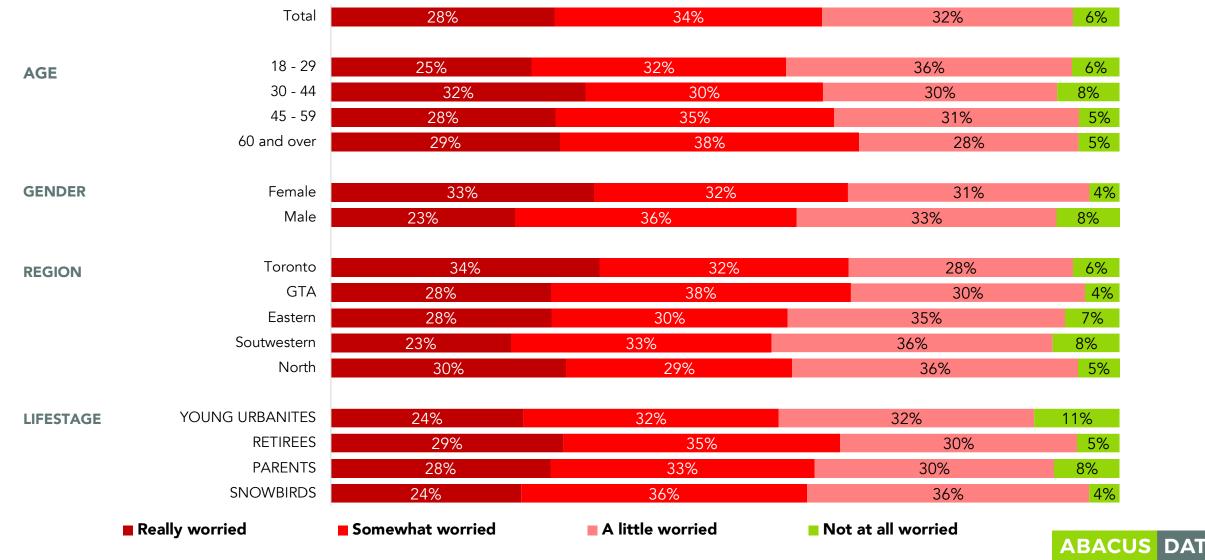
6%

32%

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.

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## WORRY ABOUT CORONAVIRUS OUTBREAK



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

# WORRY ABOUT CORONAVIRUS OUTBREAK

Total	28%	34%		32%	6%
TRIP/SPEND					
ECONOMY OVERNIGHTERS	31%	31%		31%	7%
PREMIUM OVERNIGHTERS	33%	36%		28%	3%
ECONOMY WEEKENDERS	25%	34%		32%	8%
PREMIUM WEEKENDERS	31%	39%		27%	3%
ECONOMY WEEK+	22%	40%		27%	10%
PREMIUM WEEK+	37%	21%		37%	5%
ACTIVITIES					
OUTDOOR SPACE SEEKERS	32%	25%		34%	9%
MASS EVENT/ATTRACTION FANS	35%	30%		29%	6%
INDOOR INTERESTS	35%	33%	33% 27%		4%
FAMILY LOVERS	32%	32%		30%	5%
FOODIES	32%	34%		29%	4%
WELLNESS LOVERS	31%	32%		28%	10%
TRAVEL INTENTIONS TRAVEL READY	16%	25%	42%		17%
NEED ENCOURAGEMENT	20%	39%		35%	6%
TRAVEL ADVERSE	36%	34%		27%	3%
Really worried	Somewhat worried	A little worried	Not at a	all worried	ABAC

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

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

Not worried at all

						Wave 2	<u>Wave 1</u>
A second spike in infections	46%		31%	17	<mark>7%6</mark> %	77%	68%
A family member getting COVID-19	38%		32%	<b>24</b> %	<mark>6 7</mark> %	<b>70</b> %	<b>62</b> %
Your ability to travel	30%	27%	6 <b>2</b> !	5%	18%	57%	55%
Other people not respecting your space	30%	<b>27</b> %	<mark>6 2</mark> !	5%	18%	57%	54%
Getting COVID-19 yourself	<b>26</b> %	31%	3	<b>32%</b>	11%	57%	48%
Your long-term financial situation	20% 2	26%	33%		21%	<b>46</b> %	<b>46</b> %
There not being enough medical equipment	21%	<b>36</b> %	3	0%	13%	57%	<b>46</b> %
Your job disappearing	14% 17%	22%		<b>46%</b>		31%	30%
	1						

A little worried

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.

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

Somewhat worried

Really worried

# THE TRAVEL MINDSET TODAY



## 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.



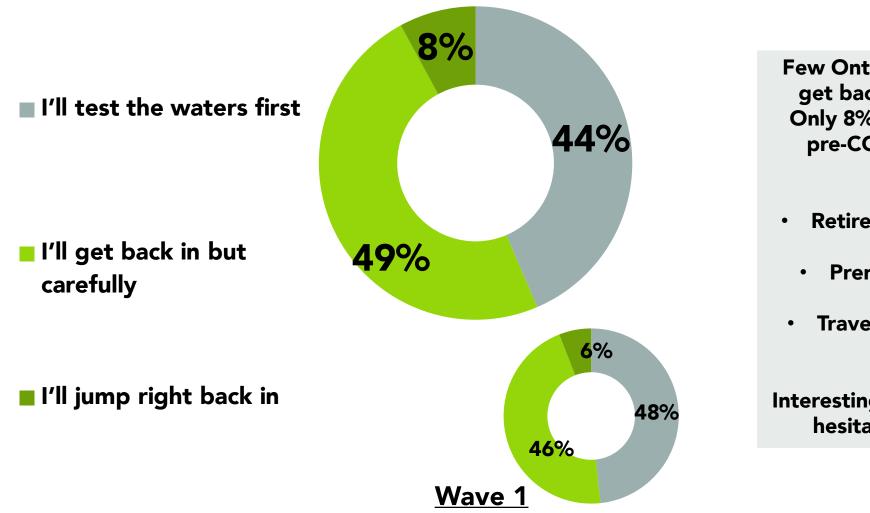
## THE TRAVEL MINDSET TODAY

## 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.



## STILL, FEW ARE EAGER TO JUMP RIGHT BACK IN



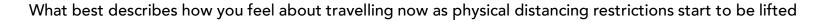
Few Ontario travellers are eager to get back into their travel habits.Only 8% are likely to resume their pre-COVID travel habits ASAP.

Most hesitant?

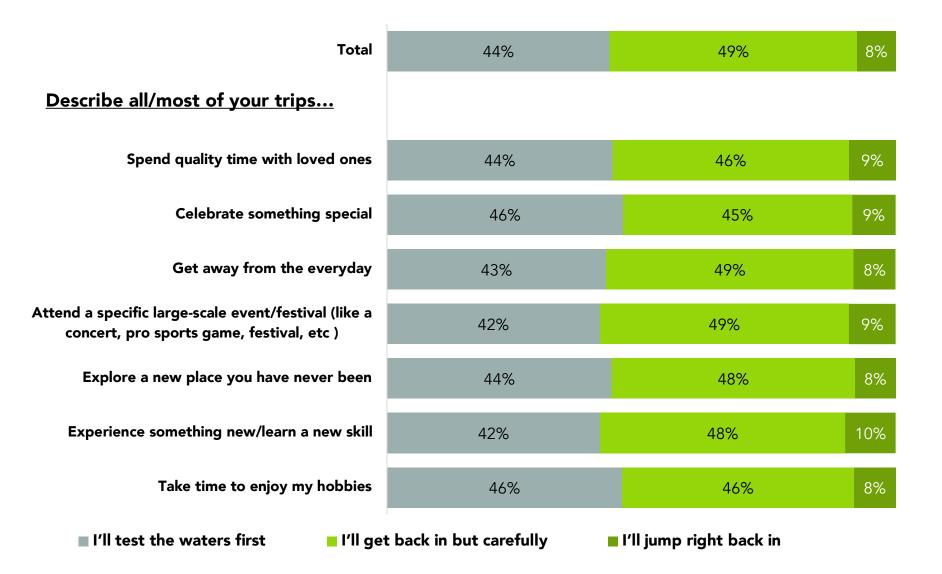
- Retirees (46% I'll test the waters first)
  - Premium weekend/overnight travellers
- Travel adverse (56% I'll test the waters first)

Interestingly snowbirds are much less hesitant than retirees overall.

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## **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



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.

Overall less com than I was trave summer									
14%	11%	13%	8%	24%	12%	11%	4	<mark>%</mark> 3%	Comfort levels in general, concern about health implications and concerns
	concerned about the health More concerned about health tions when travelling this implications when travelling during the summer							about budget are heightened compared to this past summer.	
13%	10%	16%	11%	28%	<mark>6</mark> %	<b>6%</b>	5%	5%	Those who are at higher risk (older), and enjoy
More concerned budget when tr winter	-				More concerned about my budget when travelling during the summer			velling	'higher risk activities' (indoors, crowds) are less comfortable than they were in the summer.
5% 5%	12%	14%		40%	7%	<b>7%</b>	4%	<mark>6</mark> 4%	



		Overall less con than I was trave the summer								rall more con nan I was tra th	
	Total	14%	11%	13%	8%	2	24%		12%	11%	4% 3%
AGE	18 - 29	9% 8%	14%	7%		23%		16%		15%	5% 4%
	30 - 44	12%	11%	12%	7%	23%		11%		15%	5% 4%
	45 - 59	15%	13%	12%	89	%	24%		12%	9%	<mark>2%</mark> 4%
	60 and over	22%		14%	14%	8%		25%		8%	<mark>6% 2</mark> %%
GENDER	Female	15%	13%	12%	6%		24%		13%	9%	3% 5%
	Male	13%	9%	14%	9%		4%		12%	13%	4%2%
REGION	Toronto	14%	7%	13%	8%	23%		14%		14%	5% 3%
	GTA	13%	12%	13%	8%		21%		14%	11%	<mark>3%</mark> 3%
	Eastern	12%	10%	10% 9	%	3	4%		8%	12%	<mark>3%</mark> 4%
	Soutwestern	16%	14%		5%	5%	22%		14%	8%	4% 3%
	North	19%	11	% 8%	6%		28%		7%	9% 2%	10%
LIFESTAGE	YOUNG URBANITES	13%	5% 149	% 99	%	22%		19%		13%	<mark>3%</mark> 3%
	PARENTS		9% 11			22%		14%		17%	6% 3%
	RETIREES	23%		12%	15%			24%		9%	5% 2%9
	SNOWBIRDS	14%	17%		18%	7%		3%		15%	5%119

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.

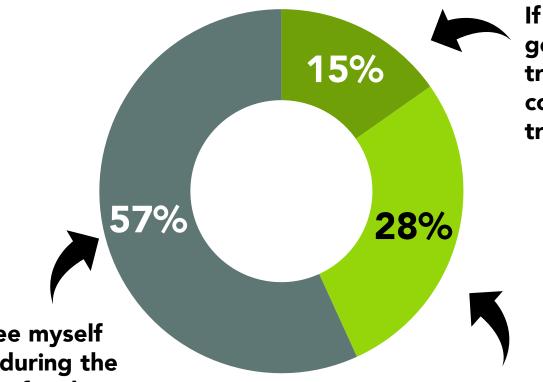
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		s comfortable travelling in r						comfortable travelling in the summer
Total	14%	11%	13%	8%	24%		12% 11%	4% 3%
TRIP/SPEND								
ECONOMY OVERNIGHTERS	14%	11%	13%	7%	21%	14	% 13%	4% 4%
PREMIUM OVERNIGHTERS	12%	12%	14%	7%	13%	16%	18%	<mark>2%</mark> 5%
ECONOMY WEEKENDERS	14%	9%	11%	8%	23%	1!	5% 12%	3% 4%
PREMIUM WEEKENDERS	10%	10% 1	2%	11%	20%	8%	16% 1 <mark>%</mark>	12%
ECONOMY WEEK+	15%	5%	13%	8%	27%	89	6 20%	22%
PREMIUM WEEK+	12%	4% 12%	1 <mark>%</mark>	33%		219	% 8%	<mark>2%</mark> 7%
ACTIVITIES								
OUTDOOR SPACE SEEKERS	9%	9% 11%	8%	16%	18	%	19%	6% 4%
MASS EVENT/ATTRACTION FANS	15%	12%	12%	7%	18%	14%	<b>13%</b>	4% 4%
INDOOR INTERESTS	14%	12%	10%	6%	17%	14%	15%	6% 6%
FAMILY LOVERS	16%	10%	10%	8%	21%	17	% 10%	5% 4%
FOODIES	15%	11%	13%	7%	19%	15	% 12%	<mark>3%</mark> 4%
WELLNESS LOVERS	9%	11% 8%	<mark>3%</mark>	22%	18	%	13% 6%	11%
TRAVEL INTENTIONS	4% 5%	11% 6%		27%	19	%	17%	4% 8%
NEED ENCOURAGEMENT		% 9%	8%	23%		19%	16%	7% 2%
TRAVEL ADVERSE	20		14%	15%	8%	24%	7%	<mark>7% 2</mark> %3%

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.



### 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.

> > ABACUS DA

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

## TRAVELLING IN THIS NEW REALITY

Total	15%	28%	57%
TRIP/SPEND			
ECONOMY OVERNIGHTERS	18%	29%	54%
PREMIUM OVERNIGHTERS	13%	26%	62%
ECONOMY WEEKENDERS	20%	33%	46%
PREMIUM WEEKENDERS	19%	27%	54%
ECONOMY WEEK+	30%	30	<mark>0%</mark> 40%
PREMIUM WEEK+	22%	34%	44%
ACTIVITIES			
OUTDOOR SPACE SEEKERS	25%	40	<mark>)%</mark> 35%
MASS EVENT/ATTRACTION FANS	18%	29%	53%
INDOOR INTERESTS	19%	29%	51%
FAMILY LOVERS	17%	28%	55%
FOODIES	17%	29%	54%
WELLNESS LOVERS	24%	37%	39%
LIFESTAGE YOUNG URBANITES	20%	40%	40%
PARENTS	19%	32%	49%
RETIREES	10% 12%		78%
SNOWBIRDS	21%	14%	66%

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

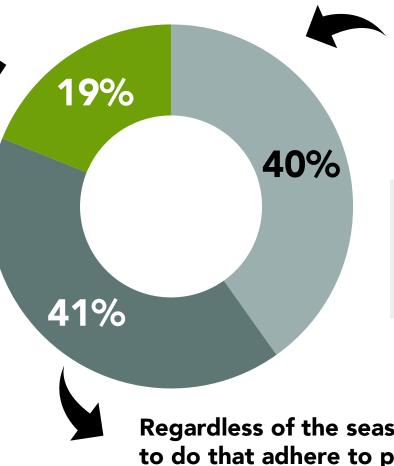
If I want to travel anytime soon, I'm going to have to get used to travelling during a pandemic, but I'm not very comfortable navigating this new travel reality

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



### 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

## FINDING THINGS TO DO

Total	40%	41%	19%
TRIP/SPEND			
ECONOMY OVERNIGHTERS	45%	39%	16%
PREMIUM OVERNIGHTERS	43%	42%	15%
ECONOMY WEEKENDERS	40%	44%	17%
PREMIUM WEEKENDERS	32%	46%	22%
ECONOMY WEEK+	37%	37%	25%
PREMIUM WEEK+	25%	44%	31%
ACTIVITIES			
OUTDOOR SPACE SEEKERS	48%	39%	13%
MASS EVENT/ATTRACTION FANS	41%	43%	16%
INDOOR INTERESTS	41%	41%	18%
FAMILY LOVERS	42%	40%	18%
FOODIES	43%	40%	16%
WELLNESS LOVERS	43%	44%	13%
YOUNG URBANITES	48%	34%	18%
PARENTS	41%	42%	17%
RETIREES	41%	40%	19%
LIFESTAGE SNOWBIRDS	42%	34%	24%
TRAVEL READY	49%	26%	25%
NEED ENCOURAGEMENT	29%	61%	10%
TRAVEL ADVERSE	43%	35%	21%

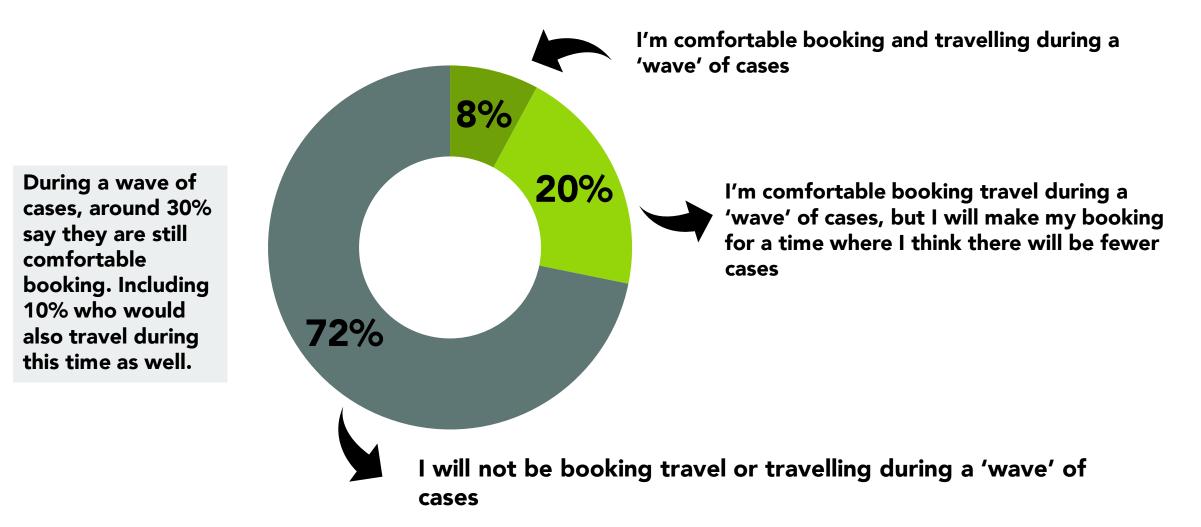
It's going to be more challenging to find places to stay and things to do that adhere to public health recommendations in the winter

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

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



### A SURGE OF CASES MEANS THAT AROUND 70% WON'T BE <u>TRAVELLING OR BOOKING</u> DURING THAT TIME





## **BOOKING & TRAVELLING IN A PANDEMIC**

Total	8%	20%	7	2%	
TRIP/SPEND					
ECONOMY OVERNIGHTERS	10% 24%			66%	
PREMIUM OVERNIGHTERS	7% 18%		75	75%	
ECONOMY WEEKENDERS	11% 26%		63%		
PREMIUM WEEKENDERS	8% 22%		70%		
ECONOMY WEEK+	18% 29%			54%	
PREMIUM WEEK+	6% 31%			63%	
OUTDOOR SPACE SEEKERS	15%	38%	<b>6</b>	47%	
ACTIVITIES MASS EVENT/ATTRACTION FANS	8%	23%		69%	
INDOOR INTERESTS	9%	24%		67%	
FAMILY LOVERS	8%	19%	7:	3%	
FOODIES	7%	21%	7	2%	
WELLNESS LOVERS	17%	32%		51%	
YOUNG URBANITES	12% 35%			53%	
PARENTS	11%	27%		62%	
RETIREES	3 <mark>% 5%</mark>			92%	
LIFESTAGE SNOWBIRDS	6% 10%		84%		
TRAVEL READY	31		38%	30%	
NEED ENCOURAGEMENT	10%	45%		45%	
TRAVEL ADVERSE 1	1 <mark>%%</mark>				

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



#### 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%

- 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 prepandemic, 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 <u>get used to</u> 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.

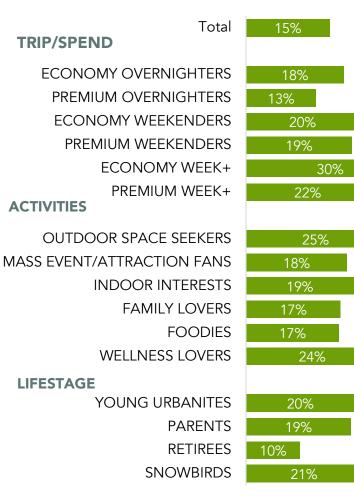
The travel behaviour of this group will be directly tied to case count. The good news is that means when cases decrease, this group is likely to travel. But when cases are high, not much can be done to change their minds.



#### **TRAVEL READY**

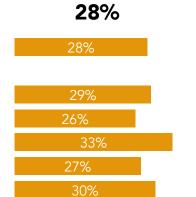
"If I want to travel anytime soon, I'm going to have to <u>get used to</u> travelling during a pandemic, and I'm comfortable navigating this new travel

#### 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 <u>not very comfortable</u> navigating this new travel reality"



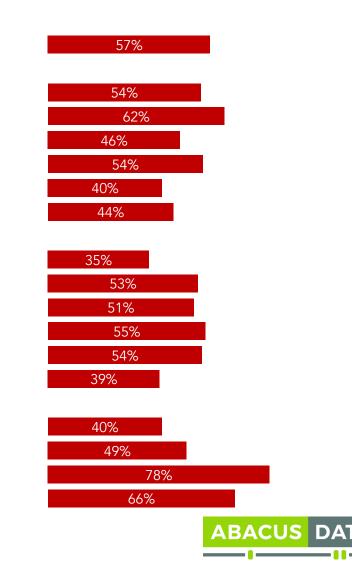
34%

#### 40% 29% 29% 28% 29% 37%

	40%	
	32%	
12%		
14%		

#### **TRAVEL ADVERSE**

"I don't see myself travelling during the pandemic for the foreseeable future" 57%



**ABACUS DATA** 

- 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.



- 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.

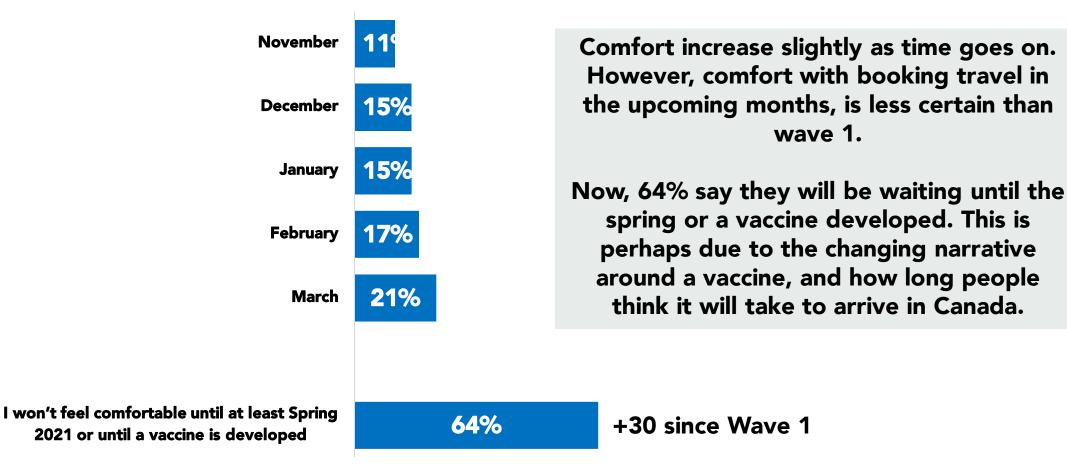


PHILOSOPHY ABOUT TRAVELLING DURING COVID-19

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 "	<ul> <li>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.</li> <li>67% would travel in December if cases decrease, 58% if they hold steady.</li> <li>67% are likely to use the 'staycation' program.</li> </ul>
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.
	ABACUS DATA

12

### COMFORTABLE TRAVELING NOT TOO SOON, NOT TOO LATE



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



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

Tatal	70/	470/		220/	_	400/	
Total	7%	17%		33%		42%	
TRIP/SPEND							
ECONOMY OVERNIGHTERS	8%	21%		31%		419	
PREMIUM OVERNIGHTERS	7%	14%		41%		38	3%
ECONOMY WEEKENDERS	9%	23%		36%	, )		32%
PREMIUM WEEKENDERS	8%	15%		39%		38	3%
ECONOMY WEEK+	15%		31%		27%		28%
PREMIUM WEEK+	24	1%	10%	25%		41%	
ACTIVITIES							
OUTDOOR SPACE SEEKERS	14%		29%		31%		27%
MASS EVENT/ATTRACTION FANS	9%	19%		35%		37	7%
INDOOR INTERESTS	10%	22%		31%		3	7%
FAMILY LOVERS	8%	17%		34%		409	
FOODIES	8%	18%		34%		419	/ 0
WELLNESS LOVERS	17%		23%		29%		31%
LIFESTAGE							
YOUNG URBANITES	13%	22	%	319	6		34%
PARENTS	7%	24%		30%		38	
RETIREES	6% 8%			41%		45%	
SNOWBIRDS	10%	13%		34%		43%	
TRAVEL INTENTIONS				0170		1070	
TRAVEL READY	19%			40%		27%	14%
NEED ENCOURAGEMENT	12%		31%		37%		20%
TRAVEL ADVERSE	2%4%	33%				60%	

I have already booked something

I haven't already booked but have started planning

I will plan once it looks like this is all over

■ I don't plan on going on any trips (aside from business travel) in the foreseeable future

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

I didn't travel as much as I usually do this past summer/fall

I have more vacation days than usual to use before year-end

I'd like to take as least one trip somewhere before the end of the year

For the next six months, I would prefer to use any of the money I set normally aside for travel, for other things that I can use/do at home

Finding ways to continue to support the local businesses in the areas I usually travel to is important to me during this time

Strongly agree

Somewhat agree

Somewhat disagree

58%

28%

31%

24%

35%

25%

13%

Strongly disagree

agree	
88%	There is some pent up desire
	to travel.
	Close to 90% didn't travel as
55%	much in the past few months.
	And 4 in 10 say they want to
	take at least one trip before
41%	the year is over.

Strongly/ Somewhat

79%

75%

8%%

25%

15%6%

18% 7%

32%

30%

20%

27%

44%

50%

Conversely, there is also some desire to spend elsewhere instead. Regardless, travellers are still keen to support the destinations they usually frequent.



#### I'D LIKE TO TAKE AT LEAST ONE TRIP SOMEWHERE...

	Total	13%	28%	/ 0	27%	32%	
AGE	18 - 29 30 - 44	18% 15%		31% 33%	31% 27%	20 25%	)%
	45 - 59	10%	27%		24%	39%	
	60 and over	10%	19%	23%		49%	
GENDER	Female	13%	26%		27%	34%	
	Male	13%	30	%	26%	30%	
REGION	Toronto	15%		30%	24%	31%	
	GTA	12%	29%		27%	32%	
	Eastern	16%	249	%	24%	36%	
	Soutwestern	13%	25%		30%	32%	
	North	11%	27%		32%	29%	
LIFESTAGE	YOUNG URBANITES	13%	32	2%	26%	29%	
	PARENTS	15%		33%	26%	26%	
	RETIREES	8%	15%	22%		55%	
	SNOWBIRDS	16%	17%	22%		46%	
<b>S</b>	trongly agree	Somewhat a	agree	Somewhat disa	gree Stro	ongly disagree	ABACUS

Do you agree or disagree with the following:

### I'D LIKE TO TAKE AT LEAST ONE TRIP SOMEWHERE...

Total	13%	28%	27%		32%	
TRIP/SPEND						
ECONOMY OVERNIGHTERS	16%	29%	269	6	29%	
PREMIUM OVERNIGHTERS	15%	25%	26%		34%	
ECONOMY WEEKENDERS	18%	33%		25%	23	%
PREMIUM WEEKENDERS	13%	35%	18%		34%	
ECONOMY WEEK+	22%	35%		22%	2	1%
PREMIUM WEEK+	19%	24%	27%		30%	
ACTIVITIES						
OUTDOOR SPACE SEEKERS	25%	37	1%	22%		16%
MASS EVENT/ATTRACTION FANS	18%	26%	26%		30%	
INDOOR INTERESTS	21%	28%		26%	25%	)
FAMILY LOVERS	18%	22%	25%		35%	
FOODIES	17%	28%	25%		30%	
WELLNESS LOVERS	25%	29%		21%	249	/ 0
TRAVEL INTENTIONS TRAVEL READY	30%		40%		22%	8%
NEED ENCOURAGEMENT	19%	42%		25%	6	14%
TRAVEL ADVERSE	6% 18%	28%		2	48%	
Strongly agree	Somewhat agree	Somewhat d	isagree	Strongly dis	agree	
			1349166		uyice	ABAC

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.

	<b>9</b> %	25%	29	%	37%	
<u>OR</u>					holding steady. You are trying	
	<b>9</b> %	<b>20%</b>	24%		47%	
	holiday				. You didn't travel during t ring an off-peak time durir	
	holiday	y season and are y/February.	now looking to be			
<u>OR</u>	holiday Januar 13% It's no	y season and are y/February. 26% w January, cases	now looking to be	ook a trip du 26% ady. You didu	aring an off-peak time durin 34% n't book a trip during the	

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

The same can be said about travelling in January.



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

Federal government websites	36%		<b>39</b> %		14	% 11%
Provincial government websites	34%		40%		16	% 10%
Destination websites	25%		45%		17%	<b>13</b> %
Travel review websites (like TripAdvisor)	22%		<b>47%</b>		18%	14%
Recommendations from family and friends	20%		<b>46</b> %		21%	13%
Attraction websites	19%	4	2%		24%	15%
Social media posts from destinations or attractions	13%	32%		30%		26%
Very likely Somewhat	at likely	Not th	at likely	N	lot at all lik	ely

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

# WHERE TO TRAVEL: GOVERNMENT WEBSITES, DESTINATION SITES ARE IMPORTANT

Federal government websites	32%	40%		<b>16%</b>	12%
Provincial government websites	30%	41	%	17%	12%
Destination websites	23%	48%	6	16%	13%
Travel review websites (like TripAdvisor)	23%	45%	1	8%	15%
Recommendations from family and friends	21%	45%	2	20%	14%
Attraction websites	<b>19</b> %	<b>46</b> %	2	0%	15%
Social media posts from destinations or attractions	13%	35%	27%	26	%
Very likely Somewhat	at likely	Not that likely	∎ Not a	t all likely	,

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

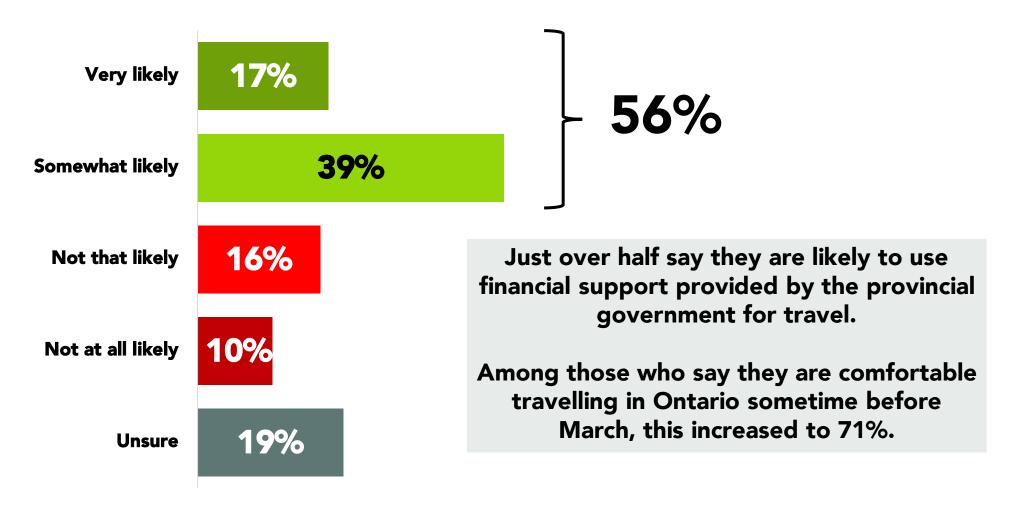
Next is crowd-sourced information (from review sites) or recommendations from someone they know.

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

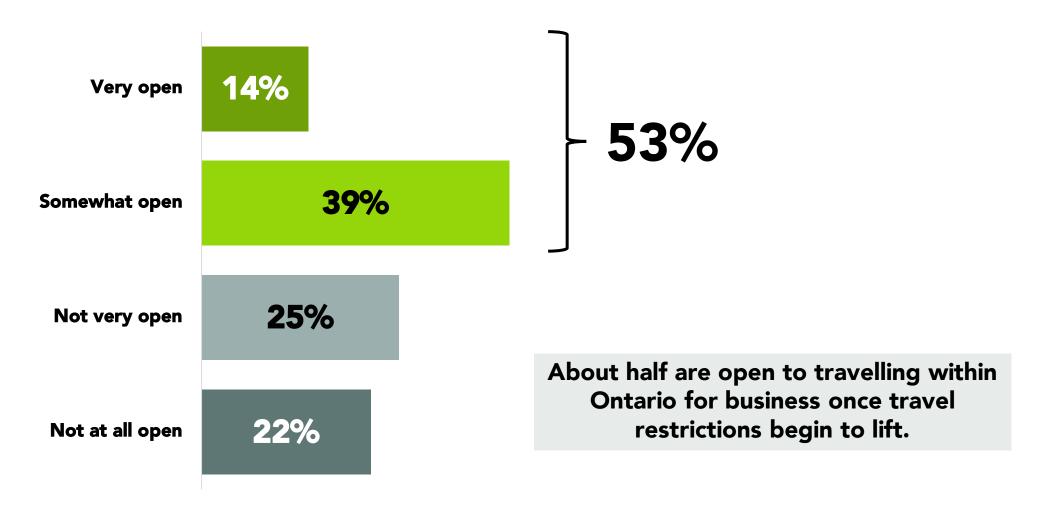
#### JUST OVER HALF SHOW INTEREST IN THE NEW GOVERNMENT 'STAYCATION' PROGRAM



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?



#### OPENNESS TO TRAVELLING FOR BUSINESS? CAUTIOUSLY OPTIMISTIC



**ABACUS** DA

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

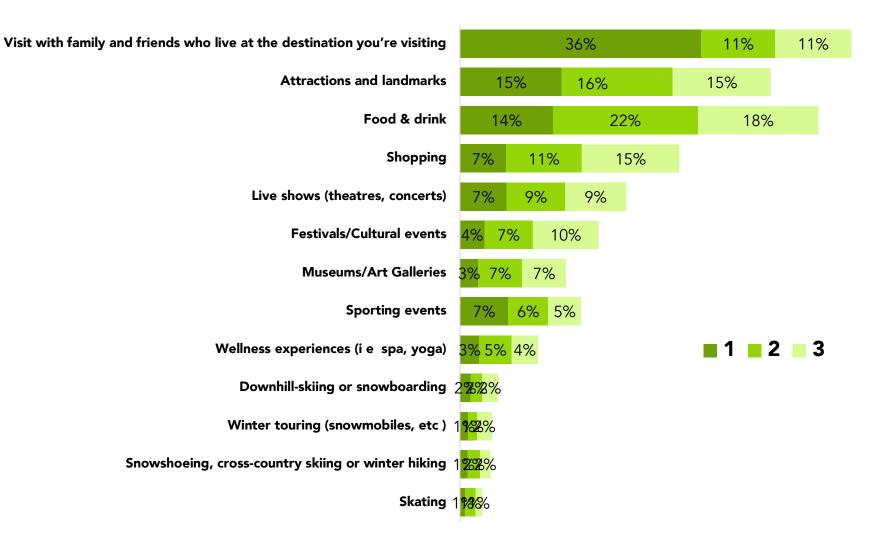
PHILOSOPHY ABOUT TRAVELLING DURING COVID-19

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 "	<ul> <li>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.</li> <li>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.</li> <li>Over 80% are comfortable with all types of destinations (from parks to large urban centres).</li> </ul>
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 "	<ul> <li>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.</li> <li>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.</li> <li>Over 75% are comfortable with all types of destinations (from parks to large urban centres).</li> </ul>
TRAVEL ADVERSE "I don't see myself travelling during the pandemic for the foreseeable future "	<ul> <li>34% would book a trip within their region in the next 3 months.</li> <li>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.</li> <li>48% will be at least likely to make a day trip during the next 6 months within Ontario.</li> <li>48% will be at least likely to make a day trip during the next 6 months within Ontario.</li> <li>0ntario. Weekend trip? 24% likely. And a week long trip: only 11% at least likely.</li> <li>Over 60% are comfortable with all types of destinations-except for large urban centres where only 40% are comfortable with this kind of destination.</li> </ul>

in



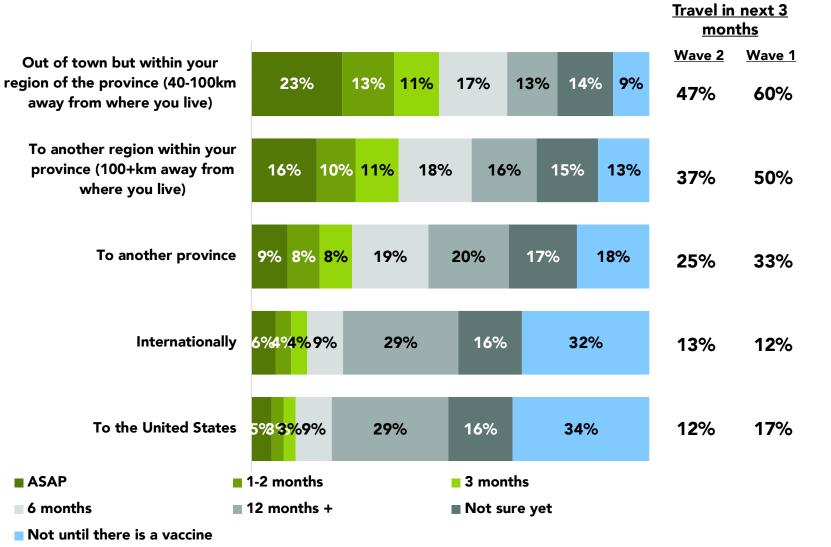
#### MOST LOOK FORWARD TO VISITING WITH FAMILY AND FRIENDS



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



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...

#### Out of town/within your region...



Total	23% 24%	Total	16% 21%
ECONOMY OVERNIGHTERS	27% 25%	ECONOMY OVERNIGHTERS	18% 23%
PREMIUM OVERNIGHTERS	21% 26%	PREMIUM OVERNIGHTERS	12% 25%
ECONOMY WEEKENDERS	27% 27%	ECONOMY WEEKENDERS	20% 24%
PREMIUM WEEKENDERS	24% 23%	PREMIUM WEEKENDERS	17% 16%
ECONOMY WEEK+	34% 28%	ECONOMY WEEK+	23% 33%
ACTIVITIES PREMIUM WEEK+	37% 19%	PREMIUM WEEK+	23% 13%
OUTDOOR SPACE SEEKERS	27% 29%	OUTDOOR SPACE SEEKERS	17% 27%
MASS EVENT/ATTRACTION FANS	22% 27%	MASS EVENT/ATTRACTION FANS	15% 21%
INDOOR INTERESTS	22% 29%	INDOOR INTERESTS	15% 22%
FAMILY LOVERS	24% 25%	FAMILY LOVERS	17% 23%
FOODIES	25% 25%	FOODIES	16% 22%
<b>LIFESTAGE</b> WELLNESS LOVERS	26% 33%	WELLNESS LOVERS	21% 26%
	200/	YOUNG URBANITES	200/
YOUNG URBANITES PARENTS	22% 29%	PARENTS	20% 29%
RETIREES	21% 26%	RETIREES	<u>    14%       25%                            </u>
SNOWBIRDS	26% 21%	SNOWBIRDS	
TRAVEL INTENTIONS SNOWBIRDS	29% 21%	3110000011103	20% 21%
TRAVEL READY	45% 32%	TRAVEL READY	41% 28%
NEED ENCOURAGEMENT	26% 30%	NEED ENCOURAGEMENT	20% 31%
TRAVEL ADVERSE	16%19%ASAP	■ 1-3 months TRAVEL ADVERSE	8% 13%

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



### 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)	<b>33%</b> Within their own region -10pts from Wave 1	<b>31%</b> To other ON regions -5 pts from Wave 1	<b>71%</b> Less likely/definitely won't be travelling to the US this summer/fall + 11 pts from Wave 1	Those who travelled to further destinations will be travelling closer to home this winter, though they are less eager to switch destinations	
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)	<b>39%</b> Within their own region -4pts from Wave 1	<b>34%</b> To other ON regions	<b>62%</b> Less likely/definitely won't be travelling int'l this summer/fall	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	
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)	<b>35%</b> Within their own region -14pts from Wave 1	<b>32%</b> To other ON regions -14pts from Wave 1	<b>50%</b> Less likely/definitely won't be travelling to another province int'l this summer/fall + 10 pts from Wave 1	this winter. And for those who never took a trip elsewhere in the province, 14% will likely do so this summer.	
Snowbirds	More likely to be travelling (much/somewhat more likely)	<b>22%</b> 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	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.	

ABACUS

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

#### THOSE NOT COMFORTABLE WITH PROVINCIAL TRAVEL HAVE MANY CONCERNS

<u>Those comfortable travelling within Ontario in the next 3</u> <u>months post travel restrictions.</u>

A second spike in infections	37%	6	33	3%	20%	<mark>6 9</mark> %
A family member getting COVID-19	31%		32%		<mark>28</mark> %	<b>9</b> %
Your ability to travel	30%		27%	30	)%	14%
Your long-term financial situation	18%	<mark>24</mark> %		34%	2	4%
Other people not respecting your space	<b>19%</b>	33	%	309	%	18%
Getting COVID-19 yourself	15%	32%		37%	, 0	<b>16%</b>
Your job disappearing	1 <mark>3%</mark> 18	%	22%		<b>46%</b>	
There not being enough medical equipment	16%	33%	0	34%	6	17%

<u>Those not comfortable travelling within Ontario for 6 months +</u> <u>or they just aren't sure yet</u>

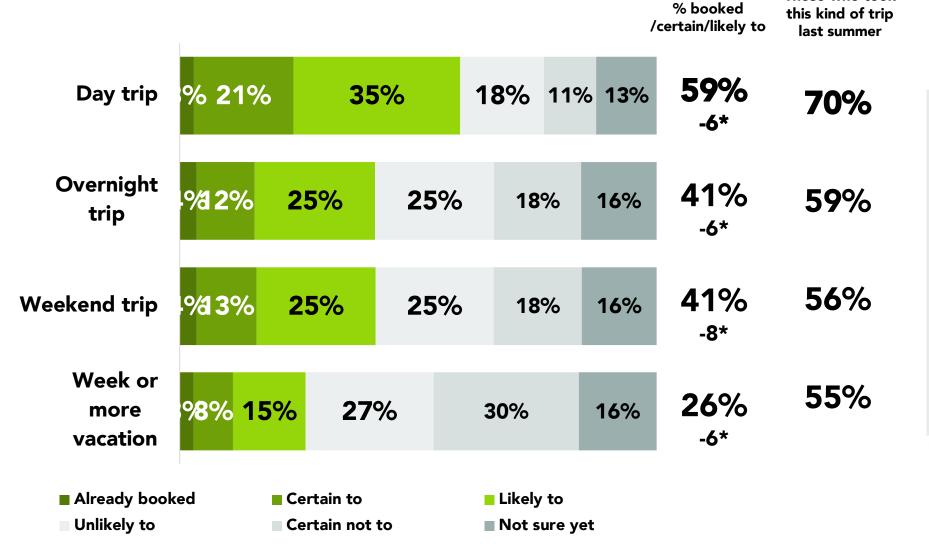
55%		29	% 1	<b>33</b> %		
43%		33%	20	<b>20%4%</b>		
30%	<b>28%</b>	209	<mark>%</mark> 2	2%		
22% 2	28%	32%	, D	8%		
33%	34%	6	<b>24%</b>	<b>9</b> %		
<b>37</b> %	31	%	27%	<mark>6%</mark>		
<b>16% 16%</b>	23%		45%			
27%	<b>39</b> %		<mark>25%</mark>	<mark>9</mark> %		

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

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

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

#### TRAVEL: SHORTER, BUT CONSISTENT WITH PAST TRAVEL PATTERNS



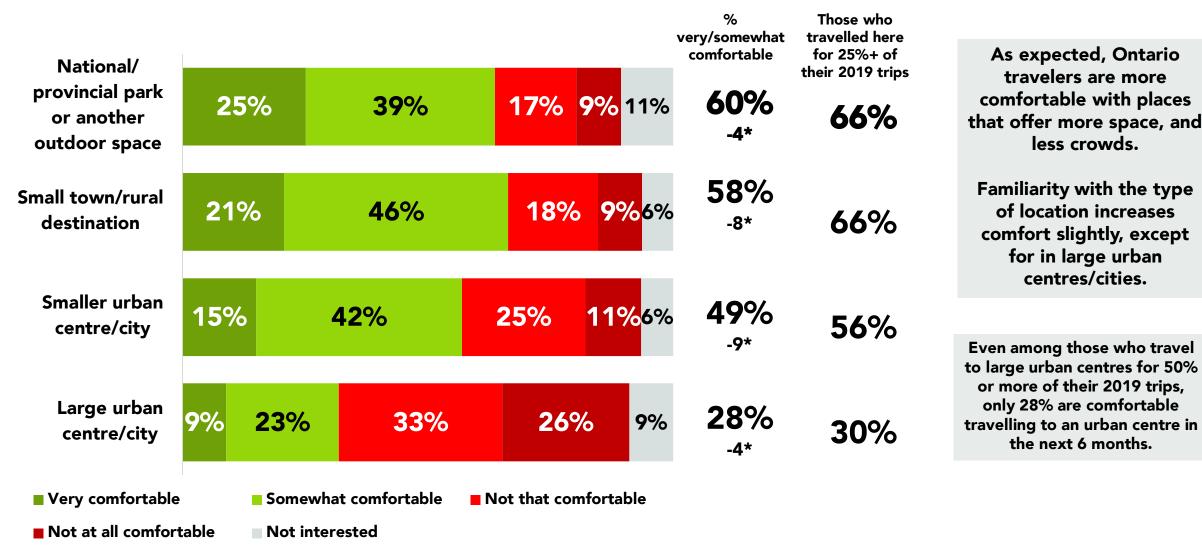
Ontarians are most comfortable with shorter trips within Ontario this winter.

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



### LESS DENSE = MORE POPULAR



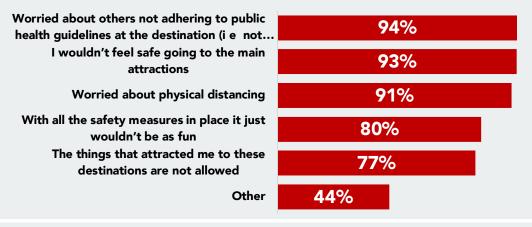
ABACUS DATA

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

### **REASONS FOR DISCOMFORT**

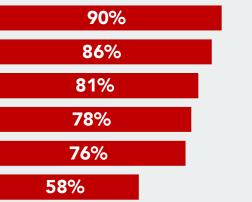
#### Why might you be uncomfortable travelling to a large urban centre/city?

\*among those who travelled here for 25%+ of their winter trips last year



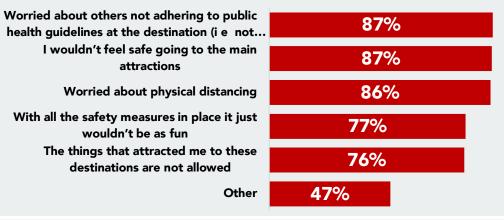
Why might you be uncomfortable travelling to a small town/rural destination? \*among those who travelled here for 25%+ of their winter trips last year

Worried about others not adhering to public<br/>health guidelines at the destination (i e not...<br/>I wouldn't feel safe going to the main<br/>attractions90%Worried about physical distancing86%Worried about physical distancing81%With all the safety measures in place it just<br/>wouldn't be as fun<br/>The things that attracted me to these<br/>destinations are not allowed76%Other58%

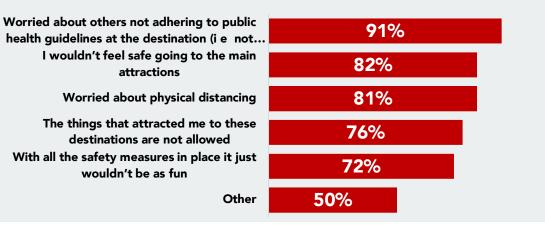


#### Why might you be uncomfortable travelling to a small urban centre/city?

\*among those who travelled here for 25%+ of their winter trips last year



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



ABACUS

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

### **ACTIVITIES: SMALLER GROUPS, MORE SPACE**

Visit with family and friends who	· 14% 33%		27%			<b>19%</b>	
Snowshoeing, cross-country skiing	13%	5 <b>2</b>	8%	18%	6	<b>29%</b>	
Downhill-skiing or snowboarding	11%	23%	6	20%		33%	
Food & drink	10%	29	%	3	81%	2	4%
Winter touring (snowmobiles, etc )	10%	25%	6	20%		33%	
Shopping	9% 33%			34%			
Skating	<b>9</b> %	289	%	<mark>21</mark> %		<b>29%</b>	1
Attractions and landmarks	8%	<b>22%</b>		30%	% <b>34</b> 9		)
Wellness experiences (i e spa, yoga)	<b>6</b> %	1 <b>7</b> %	25%	6	41%		
Museums/Art Galleries	<b>6%</b>	17%	31	%	<mark>% 38</mark> %		
Sporting events	<mark>6% 10% 21%</mark> 54%			, 0			
Festivals/Cultural events	5 <mark>6% 12% 25%</mark> 51%			1%			
Live shows (theatres, concerts)	5% 11% 22%		2%	56%			

	6 completely/ mostly comfortable	Those that love to do this activity	
)	<b>47</b> %	<b>56%</b>	
	41%	<b>76</b> %	
	34%	73%	ē
, D	40%	<b>47</b> %	9
	35%	<b>64</b> %	
6	42%	50%	
	37%	<b>69</b> %	
>	30%	51%	

54%

48%

30%

28%

22%

23%

23%

16%

18%

16%

7%

12%

13%

12%

13%

6%

5%

7%

11%

7%

**9**%

7%

**6%** 

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

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



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

### WHAT TO DO INSTEAD?

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

THOSE WHO LOVE	WILL BE OPEN TO THIS INSTEAD	% COMPLETELY/ MOSTLY COMFORTABLE
FOOD & DRINK	VISITING FAMILY AND FRIENDS	47%
<b>MUSEUMS/GALLERIES</b>	<ul> <li>SNOWSHOEING, CROSS-COUNTRY SKIING OR WINTER HIKING</li> <li>SHOPPING</li> </ul>	52% 51%
FESTIVALS/CULTURAL EVENTS	<ul> <li>SKATING</li> <li>DOWNHILL-SKIING OR SNOWBOARDING</li> <li>SNOWSHOEING, CROSS-COUNTRY SKIING OR WINTER HIKING</li> <li>ATTRACTIONS AND LANDMARKS</li> </ul>	43% 43% 51% 41%
SPORTING EVENTS	<ul> <li>SKATING</li> <li>DOWNHILL-SKIING OR SNOWBOARDING</li> <li>SNOWSHOEING, CROSS-COUNTRY SKIING OR WINTER HIKING</li> <li>FOOD &amp; DRINK</li> </ul>	51% 48% 51% 53%
LIVE SHOWS	<ul> <li>FOOD AND DRINK</li> <li>SHOPPING</li> <li>DOWNHILL SKIING/SNOWBOARDING</li> <li>SKATING</li> </ul>	48% 46% 41% 42%





## **\$ 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



## 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



# COVID TRAVEL EXPECTATIONS



## **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 "	<ul> <li>38% say they will prioritize spending on travel, over household spending.</li> <li>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).</li> <li>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.</li> <li>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.</li> </ul>
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 "	<ul> <li>30% say they will prioritize spending on travel, over household spending</li> <li>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.</li> </ul>
TRAVEL ADVERSE "I don't see myself travelling during the pandemic for the foreseeable future "	<ul> <li>15% say they will prioritize spending on travel, over household spending.</li> <li>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.</li> <li>For activities, its also critical for 71% (and 40% of those who need encouragement and 42% of those who are travel ready)</li> </ul>

#### TRAVEL EXPECTATIONS HEAVILY INFLUENCED BY **COVID-19 EXPERIENCE** Critically/Very/ Important

20%

27%

Whether you will need to self-isolate if you travel to or from a destination

						00/0
The ability to distance yourself from other people	27%	28%	5 <b>2</b> 5°	<mark>%</mark> 13%34%	<b>76</b> %	<b>73</b> %
How easy it is to get home if you needed to	25%	28%	23%	15%4%%	80%	75%
The quality and availability of local hospitals and health services	20%	24%	27%	18% 7%5%	80%	<b>76</b> %
The ability to see clear communications (emails, posters, etc ) about how the accommodation/attraction is adhering to COVID	19%	27%	27%	16% 7%5%	<b>66</b> %	65%
The cost of the trip	17%	24%	<b>26</b> %	17% 9% 7%	<b>72</b> %	<b>70</b> %
How easy it will be to stay/do activities with my 'bubble'	17%	30%	27%	16% 5%5%	73%	
Critically important	/ important		Importar	ıt		
Somewhat important	that import	ant	■ Not a fac	tor		

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

Wave 2 Wave 1

65%

70%

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.

Somewhat important

Not that important

33%

Not a factor

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?



#### TRAVELERS WANT TO HEAR ABOUT, AND BE ABLE TO ADHERE **TO PUBLIC HEALTH ADVICE** Perfectly/Pretty well

31%

37%

39%

38%

43%

34%

The cleanliness of accommodations/attractions is more important for me than before

Being able to observe social distancing protocols at the destination is important to me

I want to see clear communications (emails, posters, etc ) about how the accommodation/attraction is adhering to **COVID-19** policies

I'm more likely to book travel to areas that seem to have a lower number of cases

I'm more likely to visit a destination or attraction that I have been to before because I know what to expect

I'll be more concerned about the price of my trip than I was before

Perfectly

Pretty well

Only a little

30%

26%

57%

52%

**49%** 

46%

Not at all

25%

85%	Like wave 1, travellers will need to be assured
84%	about cleanliness, social distancing.
	Case count is also a

Wave 2

88%

89%

88%

84%

73%

60%

93%

743/

**9**33/

10%%

15%

19% 8%

Wave 1

87%

71%

57%

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?

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

37%

will prefer small group activities, rather than activities that require me to be around a lot of people will prefer to do activities where I only interact with my travel companions

will prefer less populated destinations, like a smaller city, or rural communities because of...

'll probably be taking more road trips, to avoid airline travel

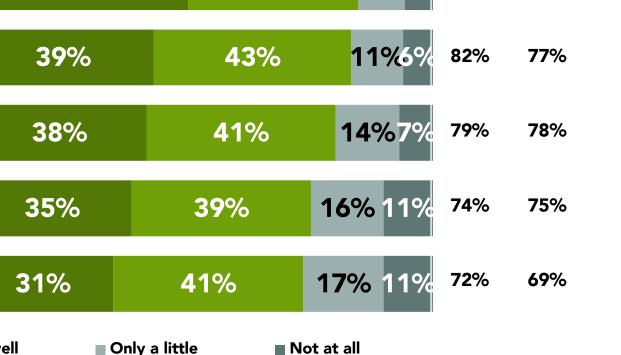
will prefer staycations (travel within 40km of where I live), over travelling somewhere further away

Perfectly

Pretty well

47%

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.



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#### **Perfectly/Pretty well**

Wave 1

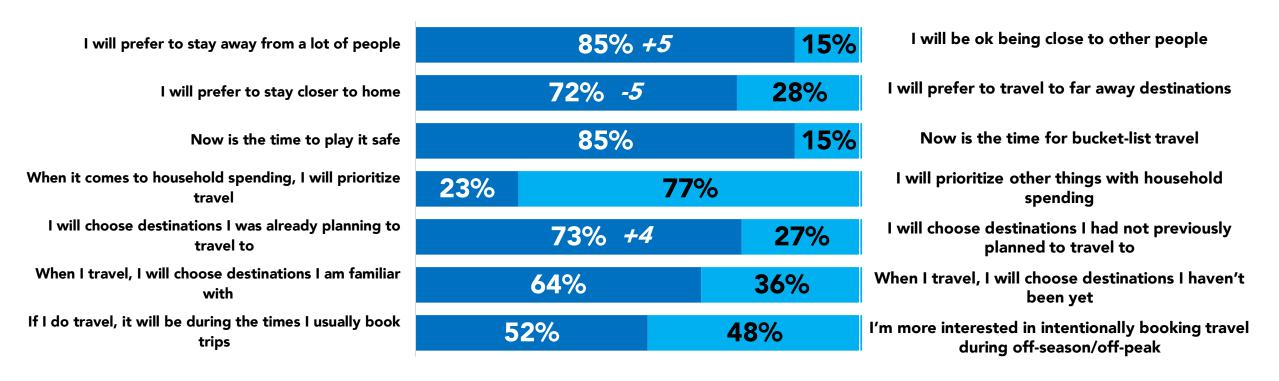
81%

Wave 2

84%

10%5%

## 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.

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#### BOOKING ACCOMMODATIONS: ADHERENCE TO PUBLIC GUIDELINES IS KEY

Adhere to and enforce public health rules and regulations regarding COVID-19

Have clearly communicated, increased measures for cleanliness

Be as contactless as possible (contactless check-in, little to no interaction with other patrons, etc )

Offer ways for you to easily travel and interact with others in your bubble (i e larger group accommodations, the ability to book rooms near others in your...

Offer multi-functional space so you don't have to leave the space often (i e kitchen/kitchenette, workspace, etc )

Important

Crucial

58	%	29%	<b>9%</b> %
46%		38%	1 <b>2%</b> %
36%	42	2%	16%6%
26%	41%	20	% 13%
26%	40%	20	5% 8%
■ Nice to have	e ∎Not re	ally a conside	eration

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.

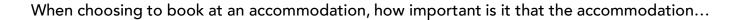
And still, over half say offering ways for 'bubbles' to interact and multifunctional spaces is important, though less so than the other measures.



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

#### **BOOKING ACCOMMODATIONS** Offer ways for you to easily travel and Offer multi-functional interact with others in your bubble (i e space so you don't have to Be as contactless as possible Have clearly Adhere to and enforce larger group accommodations, the leave the space often (i e (contactless check-in, little to communicated, increased public health rules and ability to book rooms near others in kitchen/kitchenette, measures for cleanliness regulations regarding no interaction with other your bubble, etc ) workspace, etc) COVID-19 patrons, etc) Total ECONOMY OVERNIGHTERS 61% 29% 38% PREMIUM OVERNIGHTERS 29% 47% ECONOMY WEEKENDERS 32% 42% PREMIUM WEEKENDERS 59% 21% ECONOMY WEEK+ 49% 37% 22% PREMIUM WEEK+ 32% 22% 42% OUTDOOR SPACE SEEKERS 42% 37% 48% MASS EVENT/ATTRACTION ... 30% INDOOR INTERESTS 64% 44% 32% 32% FAMILY LOVERS 67% 32% 31% FOODIES 67% 43% 54% 29% WELLNESS LOVERS 37% 42% 36% YOUNG URBANITES 51% 44% 29% 56% PARENTS 43% 27% 21% RETIREES 69% 36% 54% **SNOWBIRDS** 67% 42% TRAVEL READY 38% 19% 27% NEED ENCOURAGEMENT 44% 34% 22% 45% TRAVEL ADVERSE 71% 57% 29% 31%

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#### **BOOKING ACTIVITIES: ADHERENCE AND INFO ON CLEANING PROTOCOLS ALSO IMPORTANT**

Adhere to and enforce public health rules and regulations regarding COVID-19

Have clearly communicated, increased measures for cleanliness

Be as contactless as possible (interact with as few staff as possible, little to no interaction with other patrons, etc )

Offer activities tailored to 'bubbles'/activities that allow you to easily participate with others in your 'bubble'

Crucial

Important

Nice to have

58%	6	30% 83%
48%	3	8% 113%
<b>39</b> %	41%	<b>15%5</b> %
28%	<b>46</b> %	17% 9%
Nice to have	■ Not really a	a consideration

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.



### **BOOKING ACTIVITIES**

	Adhere to and enforce public health rules and regulations regarding COVID-19	<u>Be as contactless as possible</u>	<u>Have clearly</u> communicated, increased measures for cleanliness	Offer activities tailored to 'bubbles'/activities that allow you to easily participate with others in your 'bubble'
Total	58%	39%	48%	28%
ECONOMY OVERNIGHTERS	59%	40%	48%	30%
PREMIUM OVERNIGHTERS	64%	49%	49%	30%
ECONOMY WEEKENDERS	55%	35%	43%	29%
PREMIUM WEEKENDERS	58%	36%	49%	29%
ECONOMY WEEK+	52%	38%	47%	26%
PREMIUM WEEK+	52%	34%	46%	29%
OUTDOOR SPACE SEEKERS	54%	43%	52%	36%
MASS EVENT/ATTRACTION	63%	44%	52%	33%
INDOOR INTERESTS	64%	45%	54%	36%
FAMILY LOVERS	68%	45%	57%	35%
FOODIES	67%	45%	57%	33%
WELLNESS LOVERS	57%	46%	53%	41%
YOUNG URBANITES	54%	45%	43%	270/
PARENTS	49%	36%	43%	37%
RETIREES	70%	41%	57%	29%
SNOWBIRDS	75%	45%	59%	28% 27%
		0001		
	42%	20%	30%	18%
	40%	27%	35%	21%
TRAVEL ADVERSE	71%	49%	59%	34%



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

# **IMPACTS TO BUDGET**

4**4%** 22% 32% 38% Accommodations that offer discounts About half are interested in accommodations and activities that offer discounts. 22% 38% 348/ Activities that offer discounts 32% Many are very open to reducing Less expensive accommodations than 26% 17% 44% 8%5% their travel budgets when they what you would usually consider can. Less expensive activities than you 6% 19% 31% 41% There is a good level of interest would usually consider in less expensive accommodations, activities and Less expensive restaurants/dining restaurants/dining 7%5% 17% 29% 43% establishments than you would usually establishments. consider Much more likely Somewhat more likely No more or less likely Somewhat less likely Much less likely

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



# **LESS EXPENSIVE ACCOMMODATIONS**

	Total	17%	26%		44%	8% 5%
<b>TRIP/SPEND</b>	)					
	ECONOMY OVERNIGHTERS	19%	27%		42%	7% 4%
	PREMIUM OVERNIGHTERS	20%	27%		38%	<mark>12%</mark> 3%
	ECONOMY WEEKENDERS	20%	30%		42%	<mark>6%</mark> 2%
	PREMIUM WEEKENDERS	11%	25%	2	19%	10% 5%
	ECONOMY WEEK+	20%	30%		35%	7% 8%
	PREMIUM WEEK+	21%	19%		50%	<mark>6%</mark> 3%
	OUTDOOR SPACE SEEKERS	29%		29%	32%	5% 4%
MAS	S EVENT/ATTRACTION FANS	22%	27%		39%	7% 5%
ACTIVITIES	INDOOR INTERESTS	22%	28%		38%	6% 5%
ACTIVITIES	FAMILY LOVERS	23%	26%		41%	7% 4%
	FOODIES	21%	26%		40%	8% 5%
	WELLNESS LOVERS	30%	o 2	25%	37%	<mark>5%</mark> 3%
	YOUNG URBANITES	18%	38%		29%	9% 6%
	PARENTS	20%	29%		36%	9% 6%
	RETIREES	12%	16%	55%		10% 7%
	SNOWBIRDS	7% 13%		67%		6% 7%
LIFESTAGE						
LIFESTAGE	TRAVEL READY	24%	31%		35%	6% 4%
	NEED ENCOURAGEMENT	18%	36%		36%	<mark>7%</mark> 3%
	TRAVEL ADVERSE	15%	20%	5	1%	8% 6%
Much	more likely Somewhat	more likely	No more or less likely	Somewhat less	likely 📕 Much less lik	

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



# **LESS EXPENSIVE ACTIVITIES**

	Total	19%	31%		41%	6% 4%
TRIP/SPEND						
	ECONOMY OVERNIGHTERS	20%	35%		37%	6% 3%
	PREMIUM OVERNIGHTERS	21%	33%		36%	7% 3%
	ECONOMY WEEKENDERS	21%	34%		38%	5% 3%
	PREMIUM WEEKENDERS	16%	30%		45%	<mark>7%</mark> 2%
	ECONOMY WEEK+	20%	31%		36%	<mark>3%</mark> 10%
	PREMIUM WEEK+	24%	20%		47%	<mark>6%</mark> 3%
		0.4.0/		0.50/	050/	
	OUTDOOR SPACE SEEKERS	31%		35%	25%	5% 4%
MAS	S EVENT/ATTRACTION FANS	25%	31%		35%	6% 4%
ACTIVITIES	INDOOR INTERESTS	26%	30%		34%	6% 4%
/	FAMILY LOVERS	25%	29%		37%	5% 3%
	FOODIES	23%	32%		36%	5% 4%
	WELLNESS LOVERS	35%		29%	27%	<mark>6%</mark> 2%
	YOUNG URBANITES	23%	35%		26%	9% 7%
	PARENTS	23%	33%		32%	<u> </u>
	RETIREES		19%	56		5% 7%
	SNOWBIRDS				/0	
	SINOWDIRDS	9% 18%		60%		5% 8%
LIFESTAGE	TRAVEL READY	22%	33%		37%	5% 4%
	NEED ENCOURAGEMENT	18%	40%		35%	5% 2%
	TRAVEL ADVERSE	18%	25%		45%	6% 5%
Much	more likely Somewhat		more or less likely 🗧 So	mewhat less li	kely 📕 Much less likely	

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



# SUNNY DESTINATION TRAVELLERS



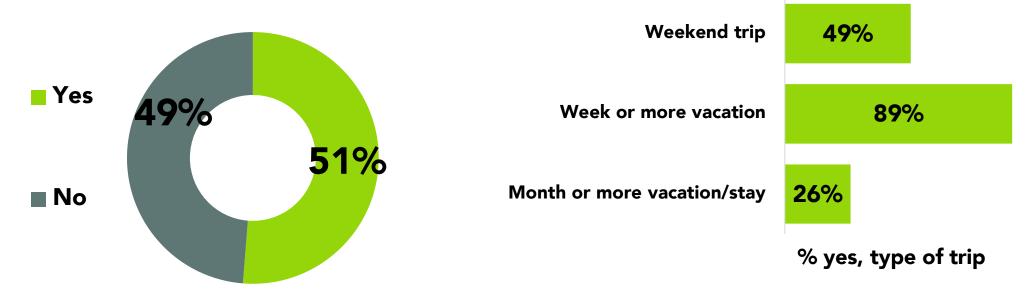
# **SUNNY DESTINATION TRAVELLERS**

- 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

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

I still intend to travel to a sunny destination this winter, for as long as usual

I still intend to travel to a sunny destination this winter, just for a shorter time

<b>28</b> %	47	<mark>% 16% 9</mark> %	75%	Most are likely to be allocating their travel budget to spending in the home.
18%	38%	<b>29%</b> 15%	<b>56%</b>	And half say they will be likely choosing an Ontario destination rather than their usual sunny destination.
10% <b>17%</b>	23%	50%	<b>27</b> %	In total, 16% have intentions to make at least one trip to a sunny
8% 19%	<b>26</b> %	48%	<b>27</b> %	destination this winter, either for as long as usual, shorter or both.

% very/somewhat likely

Very likely

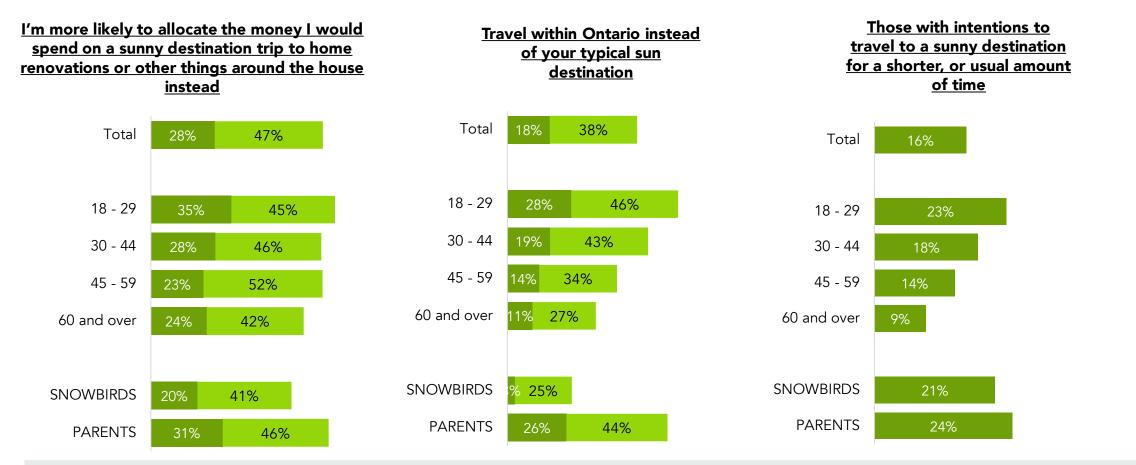
Somewhat likely

Not very likely

Not at all likely



### TRAVEL THIS WINTER...



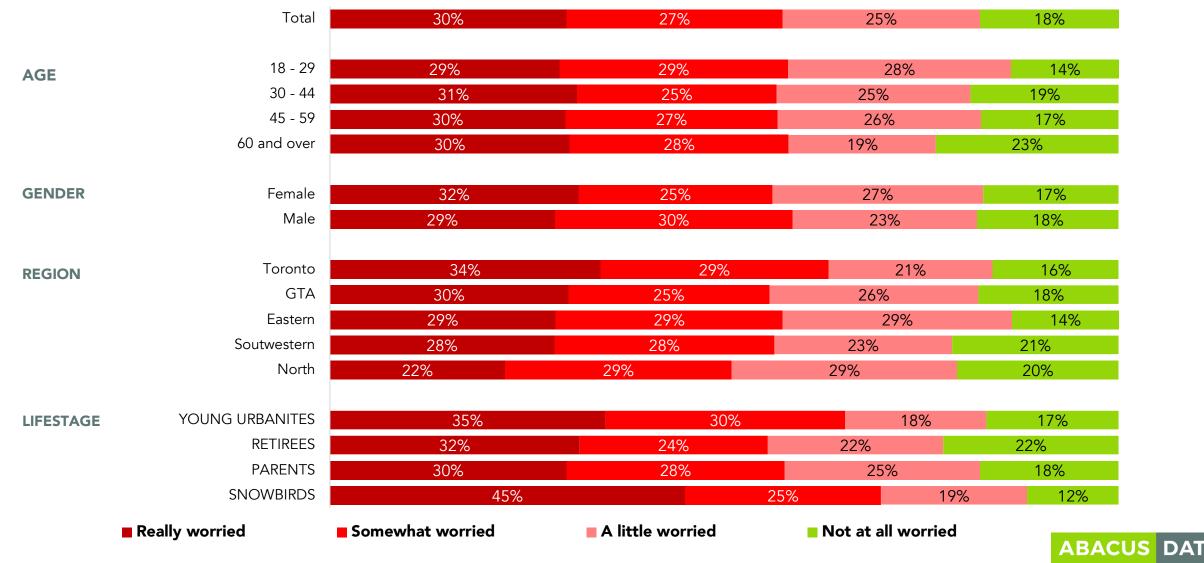
Young Ontarians are more likely to say they will be allocating money elsewhere, travelling in Ontario and keeping their same travel plans. While older Ontarians overall are apprehensive about making a trip south, 'snowbirds' are more eager, though most are still cautious.

How likely are you to do the following...

# APPENDIX



# YOUR ABILITY TO TRAVEL



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

# YOUR ABILITY TO TRAVEL

Total	30%	27%	25%	18%
TRIP/SPEND				
ECONOMY OVERNIGHTERS	29%	26%	29%	16%
PREMIUM OVERNIGHTERS	44%		34%	15% 8%
ECONOMY WEEKENDERS	27%	30%	31%	12%
PREMIUM WEEKENDERS	37%	379	/o	17% 9%
ECONOMY WEEK+	34%	32%	229	% 12%
PREMIUM WEEK+	39%	22%	28%	11%
ACTIVITIES				
OUTDOOR SPACE SEEKERS	36%	29%	25%	<i>а</i> 10%
MASS EVENT/ATTRACTION FANS	35%	29%	22%	14%
INDOOR INTERESTS	35%	28%	22%	15%
FAMILY LOVERS	33%	29%	20%	18%
FOODIES	36%	27%	22%	14%
WELLNESS LOVERS	39%	26%	24%	5 11%
TRAVEL INTENTIONS TRAVEL READY	33%	24%	28%	15%
NEED ENCOURAGEMENT	27%	33%	30%	10%
TRAVEL ADVERSE	31%	25%	22%	22%
Really worried	Somewhat worried	A little worried	Not at all worrie	d

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

# **ANOTHER SPIKE**

	Total	46%		31%	17%	6%
AGE	18 - 29	42%		33%	19%	6%
	30 - 44	46%		28%	17%	9%
	45 - 59	47%		32%	16%	5%
	60 and over	51%		30%	14%	5%
GENDER	Female	50%		29%	16%	5%
	Male	42%		34%	17%	7%
REGION	Toronto	46%		30%	19%	5%
	GTA	47%		33%	15%	6%
	Eastern	46%		32%	16%	6%
	Soutwestern	46%		32%	14%	7%
	North	42%		22%	30%	6%
LIFESTAGE	YOUNG URBANITES	35%	3	5%	26%	4%
	RETIREES	53%	)	27%	15%	5%
	PARENTS	43%		35%	16%	7%
	SNOWBIRDS	41%		31%	19%	9%
•	Really worried	Somewhat worried	A little worried	Not at all wo	orried	ABACL

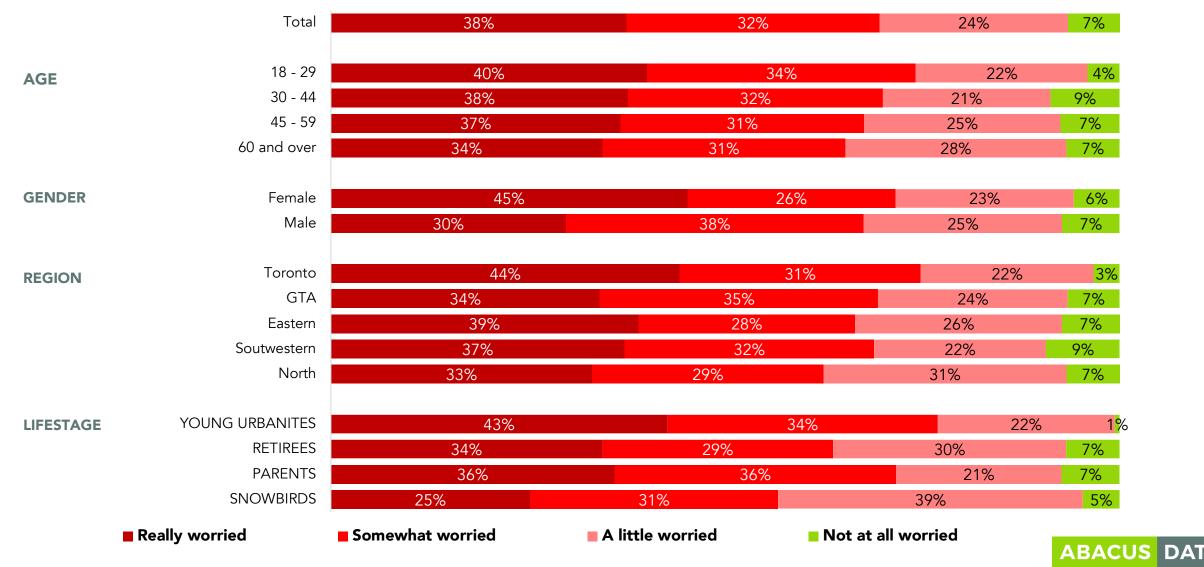
Overall, how worried, if at all, is the situation with the coronavirus or COVID-19 making you right now?

# **ANOTHER SPIKE**

Tota	46%		31%	17%	6%
TRIP/SPEND					
ECONOMY OVERNIGHTER	50%		27%	17%	6%
PREMIUM OVERNIGHTER	42%		43%		13% <mark>2%</mark>
ECONOMY WEEKENDER	43%		33%	16%	8%
PREMIUM WEEKENDER	40%		37%	21%	, 2%
ECONOMY WEEK	39%		35%	14%	12%
PREMIUM WEEK	43%		33%	24%	15
ACTIVITIES					
OUTDOOR SPACE SEEKER	48%		30%	15%	7%
MASS EVENT/ATTRACTION FAN	5 49%		31%	15%	6%
INDOOR INTEREST	5 51%		30%	16%	% 4%
FAMILY LOVER	53%		27%	16%	<b>4%</b>
FOODIE	50%		30%	16%	5%
WELLNESS LOVER	46%		30%	15%	8%
TRAVEL INTENTIONS TRAVEL READ	29%	27%	29%		15%
NEED ENCOURAGEMEN	36%		38%	18%	7%
TRAVEL ADVERS	569	%	29%		13% <mark>2%</mark>
Really worried	Somewhat worried	A little worried	Not at all worried		ABAC

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

# FAMILY MEMBER GETTING COVID-19



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

# FAMILY MEMBER GETTING COVID-19

	Total	38%		32%		24%	7%	
TRIP/SPEND								
ECONOMY OVERNIG	HTERS	38%		35%		21%	6%	
PREMIUM OVERNIG	HTERS	43%		37%		189	% <mark>3%</mark>	
ECONOMY WEEKEN	NDERS	38%		32%		21%	8%	
PREMIUM WEEKEN	NDERS	38%		31%		28%	4%	
ECONOMY W	VEEK+	35%		34%		21%	9%	
PREMIUM V	VEEK+	34%	25%			40%	19	
ACTIVITIES								
OUTDOOR SPACE SE	EKERS	39%		33%		21%	8%	
MASS EVENT/ATTRACTION	FANS	43%		29%		22%	6%	
INDOOR INTE	RESTS	47%	29%			20%	4%	
FAMILY LO	OVERS	47%		28%		19%	6%	
FO	ODIES	44%		32%		19%	5%	
WELLNESS LC	OVERS	40%		25%		24%	10%	
TRAVEL INTENTIONS TRAVEL F	READY	28%	24%		35%		13%	
NEED ENCOURAGE	MENT	32%		38%		23%	8%	
TRAVEL AD	VERSE	43%		31%		22%	4%	
Really worried		Somewhat worried	A little worried	I <u> </u>	ot at all wo	orried		
							ABAC	

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

# TRAVEL COMFORT LEVEL

	Total	44%		49%	8%	
<b>TRIP/SPEND</b>						
	ECONOMY OVERNIGHTERS	43%	43% 49%			
	PREMIUM OVERNIGHTERS	46%		50%	4%	
	ECONOMY WEEKENDERS	41%		49%	10%	
	PREMIUM WEEKENDERS	46%		51%	2%	
	ECONOMY WEEK+	36%		51%	13%	
	PREMIUM WEEK+	29%		65%	6%	
	OUTDOOR SPACE SEEKERS	40%		51%	8%	
MASS	S EVENT/ATTRACTION FANS	44%		49%	8%	
ACTIVITIES	INDOOR INTERESTS	45%		49%	5%	
/	FAMILY LOVERS	46%		46%	8%	
	FOODIES	43%		49%	8%	
	WELLNESS LOVERS	40%		51%	9%	
	YOUNG URBANITES	33%		52%	15%	
	PARENTS	41%		50%	9%	
	RETIREES	46%		50%	4%	
	SNOWBIRDS	38%		52%	10%	
LIFESTAGE						
	TRAVEL READY	27%		51%	22%	
	NEED ENCOURAGEMENT	28%		62%	10%	
	TRAVEL ADVERSE	56%		41%	3%	
	I'll test the waters first	I'll get back in but on the second	arefully	I'll jump right back in		
		-	-		ABACUS	

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