

**RISK AVERSION IS
CRITICAL**

**CLOSE TO HOME
DISTANCING
CONTROL**

**THINKING OUTSIDE
THE BOX**

ABACUS DATA

HOW WILL THE PANDEMIC IMPACT TRAVEL IN ONTARIO THIS YEAR?

RESEARCH AND ANALYSIS FROM CANADA'S LEADING PUBLIC
AFFAIRS AND MARKET RESEARCH EXPERTS

THREE TAKEAWAYS

1. **PUBLIC ANXIETY ABOUT THE PANDEMIC IS DOWN BUT PERSISTS.**
2. **TRAVEL BEHAVIOUR WILL SHIFT SUBSTANTIALLY THIS YEAR.**
3. **MITIGATING RISK WHILE MAKING IT EASIER FOR TRAVELERS TO VENTURE FROM HOME IS FUNDAMENTAL.**

HOW WILL THE PANDEMIC IMPACT TRAVEL?



WHAT'S THE
NEW NORMAL?

ABACUS DATA

SURVEY DESIGN

- **ONLINE SURVEY OF 3,000 TRAVELERS**
- **2,000 LIVING IN ONTARIO**
- **JUNE 3 TO 14, 2020**

ABACUS DATA



THE IMPACT OF COVID ON TOURISM

POSTPONED A TRIP

62%

CANCELLED A TRIP

57%

CHANGED DESTINATION

19%



WHAT'S THE
NEW NORMAL?

ABACUS DATA

JUMP BACK IN
6%

WHEN IT COMES TO
RETURNING TO
TRAVEL, WILL YOU...

TEST THE WATER FIRST
48%

GET BACK IN CAREFULLY
46%



WHAT'S THE
NEW NORMAL?



NOW'S THE TIME TO ENCOURAGE ONTARIANS TO EXPLORE ONTARIO



WHAT'S THE
NEW NORMAL?

ABACUS DATA

INTERNATIONALLY

68%

TO THE US

67%

TO ANOTHER PROVINCE

52%

**I WON'T FEEL
COMFORTABLE
TRAVELING THERE
WITHIN THE NEXT
6 MONTHS**



**WHAT'S THE
NEW NORMAL?**



HOW LONG BEFORE YOU WILL TRAVEL...

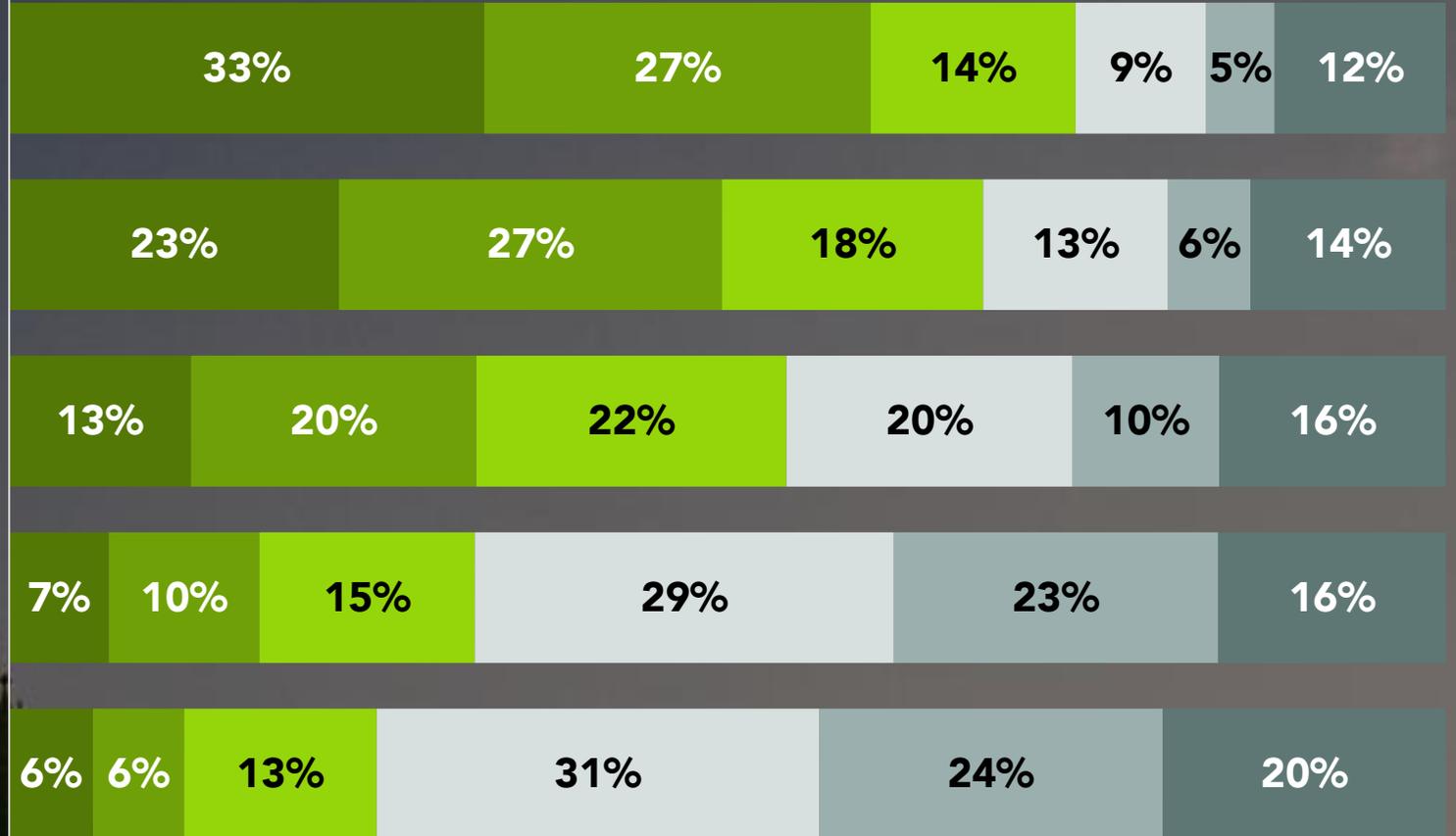
Out of town but within your region

To another region within your province

To another province

To the United States

Internationally



■ ASAP ■ 3 months ■ 6 months ■ 12 months+ ■ Not until there is a vaccine ■ Not sure yet

WHAT KINDS OF TRIPS WILL TRAVELERS FEEL COMFORTABLE DOING?



WHAT'S THE
NEW NORMAL?

ABACUS DATA

**SHORTER TRIPS,
CLOSER TO HOME.**



THIS YEAR
DAY TRIPS
65%

OVERNIGHT
47%

WEEK OR MORE
32%

LAST YEAR
DAY TRIPS
75%

OVERNIGHT
60%

WEEK OR MORE
44%



**WHAT'S THE
NEW NORMAL?**



**SMALLER TOWNS,
OUTDOORS, LESS
DENSITY.**

SMALL TOWN/RURAL

66%

SMALL CITY

57%

LARGE CITY

32%



**WHAT'S THE
NEW NORMAL?**



**2020 IS THE
YEAR OF THE
ROAD TRIP.**

**YOUR CAR
87%**

**TRAIN
33%**

**AIRPLANE
27%**



**WHAT'S THE
NEW NORMAL?**



ACCOMODATIONS:
**BEING ABLE TO
CONTROL YOUR
SPACE IS KEY.**

2ND PROPERTY

74%

STAY W/ FAMILY/FRIENDS

73%

CAMPING/RVING

57%



WHAT'S THE
NEW NORMAL?

ABACUS DATA

**HALF OF THOSE WHO
HAVE STAYED IN THESE
ACCOMODATIONS ARE
COMFORTABLE DOING
SO TODAY.**

CHAIN HOTEL

54%

LOCAL/BOUTIQUE HOTEL

56%

B&B

54%



**WHAT'S THE
NEW NORMAL?**

ABACUS DATA

**ACTIVITIES: FAMILIAR,
OUTDOORS, NO
CROWDS.**

OUTDOOR ACTIVITIES

69%

FOOD & DRINK

52%

AMUSEMENT PARKS/ZOOS

28%

41% WHO VISITED LAST YEAR

**WHAT'S THE
NEW NORMAL?**

ABACUS DATA

WHY DID YOU TRAVEL IN SUMMER/FALL 2019?

Spend time with loved ones

79%

Get away from the everyday

74%

Enjoy the warm weather

74%

Explore a new place

56%

Celebrate something special

49%

Experience something new

40%

Attend a specific event

36%

WHAT WILL GUESTS/CUSTOMERS EXPECT IN A COVID-WORLD?



WHAT'S THE
NEW NORMAL?

ABACUS DATA

**IMPORTANT FACTORS
IN DECIDING WHERE
AND WHAT YOU DO
THIS SUMMER.**

**WILL I NEED TO SELF-
ISOLATE AFTER?**

**CAN I DISTANCE MYSELF
FROM OTHERS?**

**HOW CLEAR ARE
COMMUNICATIONS?**

**HOW EASY IS IT TO GET
HOME IF I NEED TO?**



**WHAT'S THE
NEW NORMAL?**



A wide-angle photograph of Niagara Falls, showing the water cascading over the edge and creating a large plume of white mist. The sky is overcast with grey clouds. In the background, a line of trees and a tall, thin tower are visible. The foreground shows the turbulent, white-water rapids of the river below the falls.

86%

**SAY RIGHT NOW
IS THE TIME TO
PLAY IT SAFE.**

WHAT ELSE MATTERS TO TRAVELERS?

**CLEANLINESS MORE
IMPORTANT THAN EVER.**

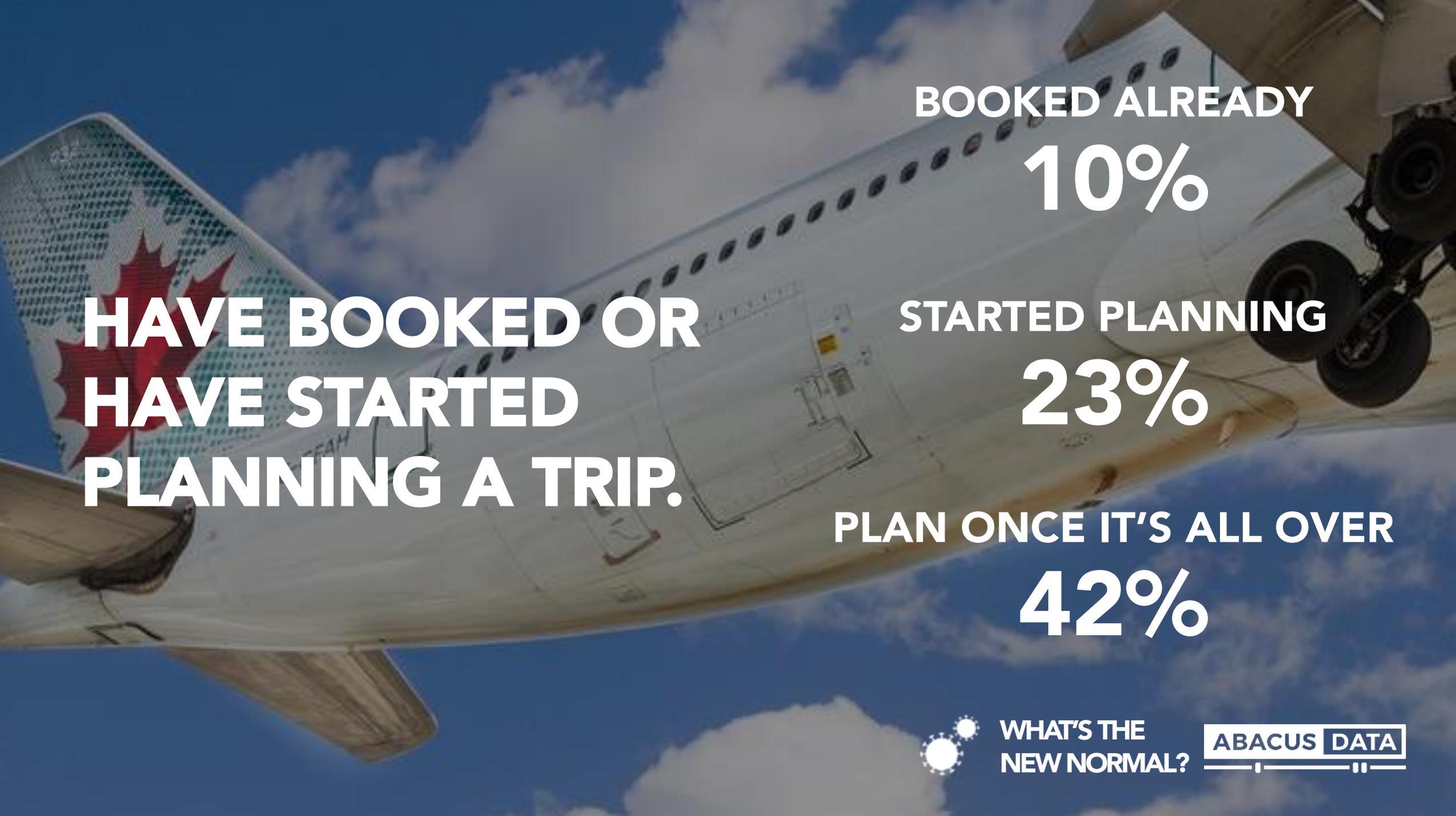
**MORE LIKELY TO VISIT A
DESTINATION I HAVE
BEEN BEFORE.**

**SOME COST SENSITIVITY
FOR THOSE IMPACTED
BY THE PANDEMIC.**



**WHAT'S THE
NEW NORMAL?**





**HAVE BOOKED OR
HAVE STARTED
PLANNING A TRIP.**

BOOKED ALREADY

10%

STARTED PLANNING

23%

PLAN ONCE IT'S ALL OVER

42%



**WHAT'S THE
NEW NORMAL?**



WHEN WILL YOU FEEL COMFORTABLE MAKING TRAVEL PLANS IN ONTARIO?

JULY
22%

AUGUST
35%

SEPTEMBER
34%



WHAT'S THE
NEW NORMAL?

ABACUS DATA

**I WOULD FEEL
COMFORTABLE
WELCOMING
VISITORS FROM...**

COMMUNITIES NEAR ME

54%

**OTHER PARTS OF
ONTARIO**

45%

THE UNITED STATES

17%



**WHAT'S THE
NEW NORMAL?**

