

**HESITATIONS FOR
WINTER 2020
TRAVEL**

**COVID SPECIFIC
EXPECTATIONS
FRONT & CENTRE**

**WHAT IS THE
STORY?**

ABACUS DATA

**COVID-19 & TRAVEL IMPACT
STUDY
INDIVIDUAL RTO REPORT:
RTO 8**

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.

In this report:

The margin of error for the visitors sample for a comparable probability-based random sample of the same size is +/- 3.8%, 19 times out of 20.

The margin of error for the residents sample for a comparable probability-based random sample of the same size is +/- 4.8%, 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, and region. Totals may not add up to 100 due to rounding.

Travellers are those who, prior to the COVID-19 pandemic, took at least one leisure trip a year, to a destination at least 40km from their residence.

PROFILES

	SAMPLE SIZE	THOSE WHO...
VISITORS TO YOUR REGION....	n=642	Visited a small town/rural destination for 25%+ of their trips last year OR Visited a national/provincial park or other outdoor destination for 25%+ of their trips last year AND Love to do outdoor activities like skating, down-hill skiing snowshoeing, cross-country skiing, hiking, food & drink, or wellness experiences
RESIDENTS OF YOUR REGION...	n=415	Region 6,8,9, & 11 FSAs

KEY FINDINGS FOR RTO: 8

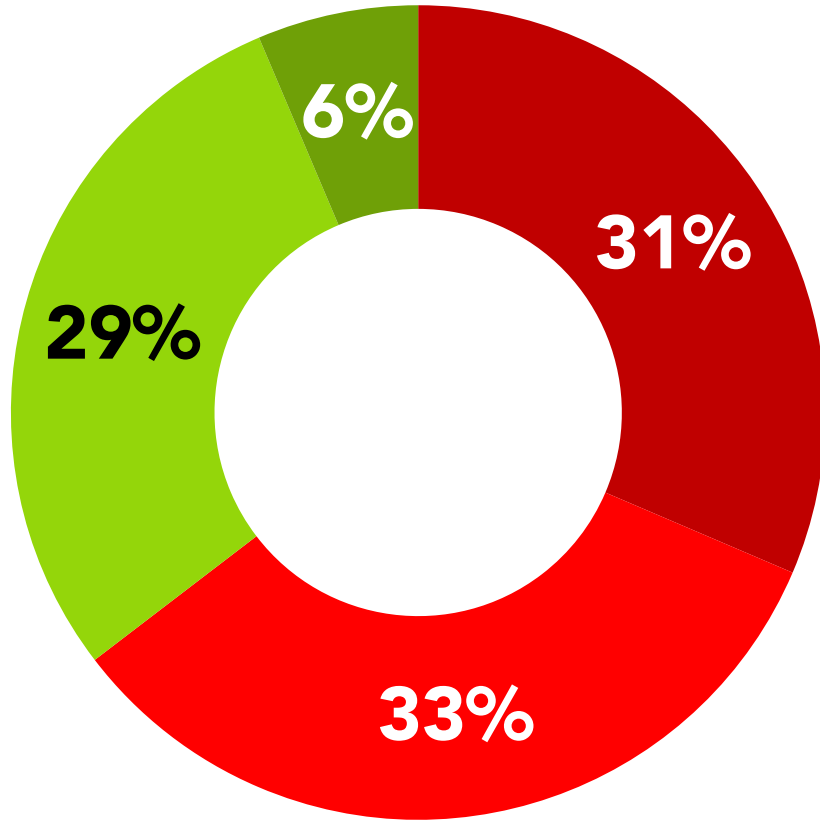
1. Like all Ontario residents, few have become comfortable with travelling amidst this new reality. Only 20% have become used and are comfortable with the situation.
2. Only 16% of travellers to your region say they never have trouble finding things to do when travelling during a pandemic. And 62% won't be booking or travelling during a wave of cases.
3. One third have their travel plans underway (33% have booked or started planning).
4. Travellers will be most comfortable with the outdoor activities your region has to offer.
5. 52% of visitors to your region would consider taking a trip to an Ontario destination within their region. 39% are comfortable travelling to another region in Ontario.
6. 45% of residents in your region would consider a trip in the region sometime this season. 32% would consider a trip to a destination in another region. And few are interested in travelling any further.

A dark, atmospheric photograph of an airport terminal. In the foreground on the right, a black rolling suitcase stands upright. The background shows a busy airport with people walking, sitting on chairs, and standing near information screens. The lighting is dim, with some screens providing a blue glow. The overall mood is one of travel and transit.

PART 1: VISITORS TO YOUR REGION

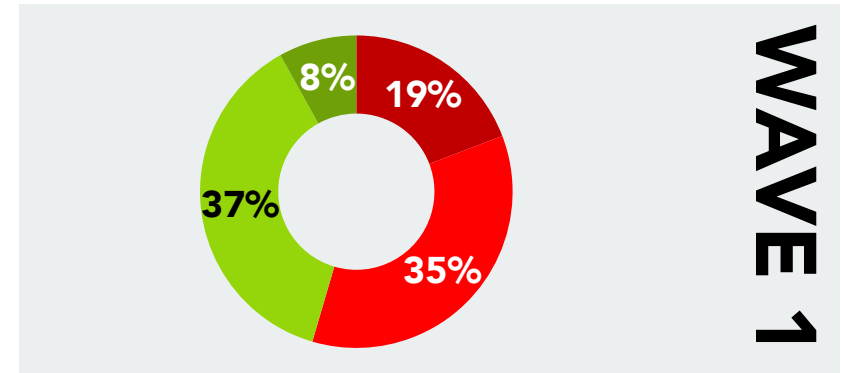
WORRY ABOUT THE PANDEMIC

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



64% say coronavirus is making them really/somewhat worried.

Among all Ontarian travellers
62% say coronavirus is making them worried.

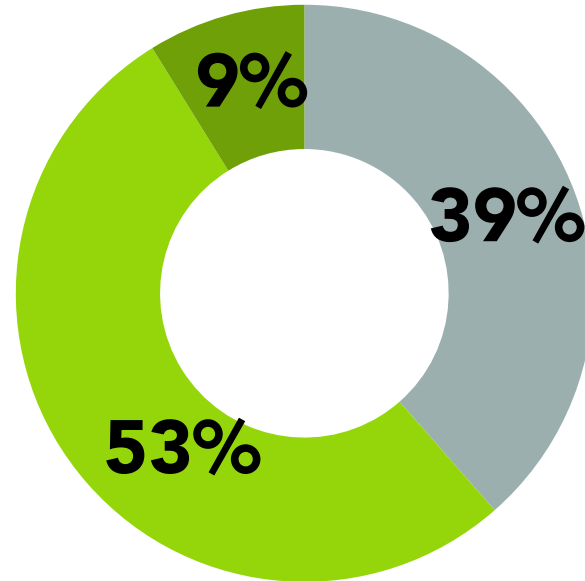


WAVE 1

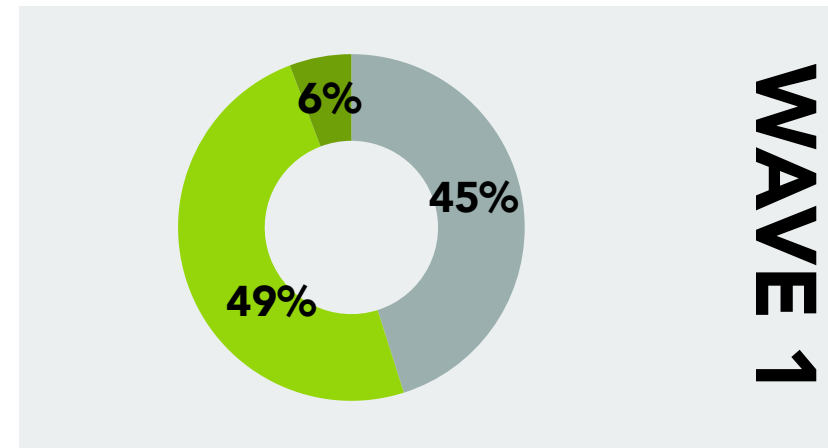
Overall, how worried, if at all, is the situation with the coronavirus or COVID-19 making you right now?

POST-COVID TRAVEL COMFORT

- I'll test the waters first
- I'll get back in but carefully
- I'll jump right back in



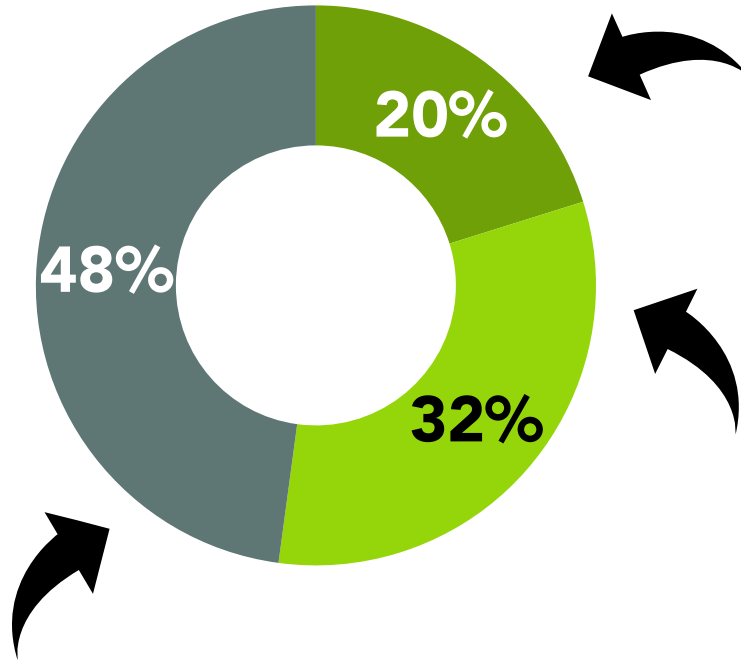
Like Ontarian travellers overall, few will jump right back in.



WAVE 1

What best describes how you feel about travelling?

FEW ARE COMFORTABLE WITH THIS NEW REALITY

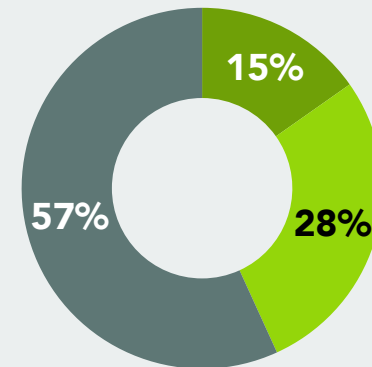


If I want to travel anytime soon, I'm going to have to get used to travelling during a pandemic, and I'm comfortable navigating this new travel reality

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

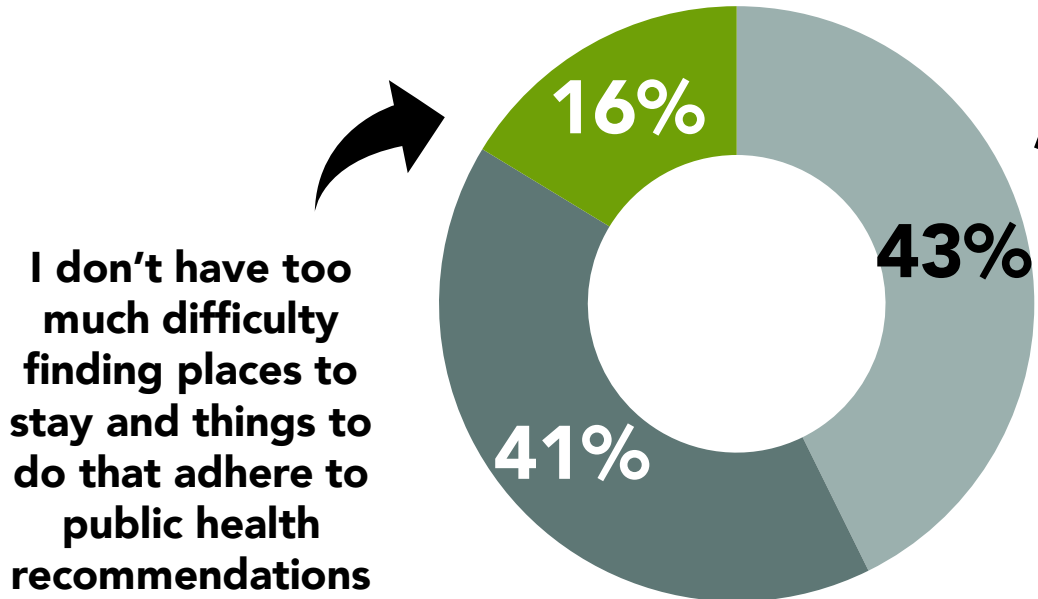
I don't see myself travelling during the pandemic for the foreseeable future

All Ontario Travellers



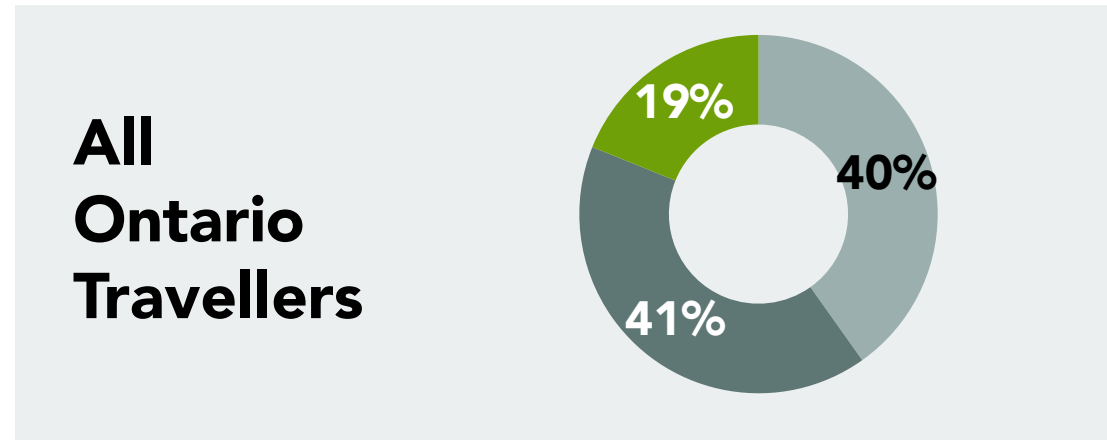
Which of the following do you agree with most?

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



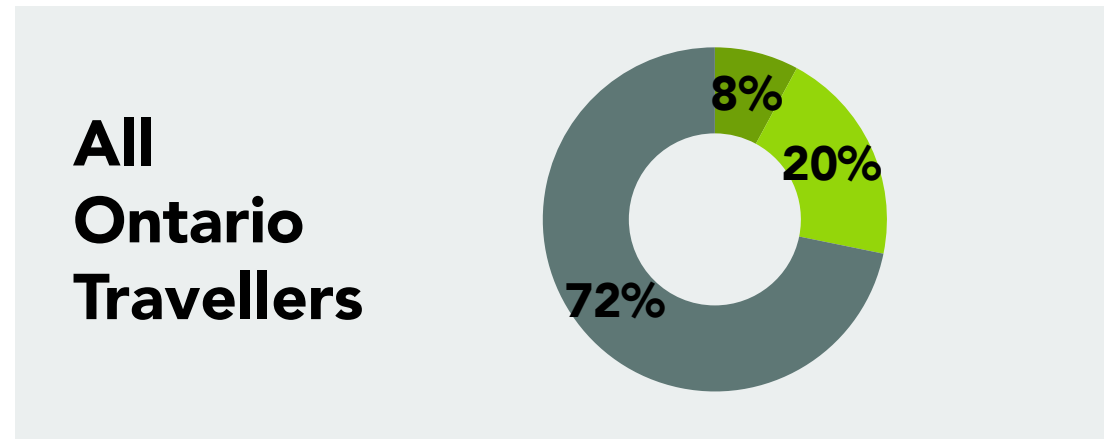
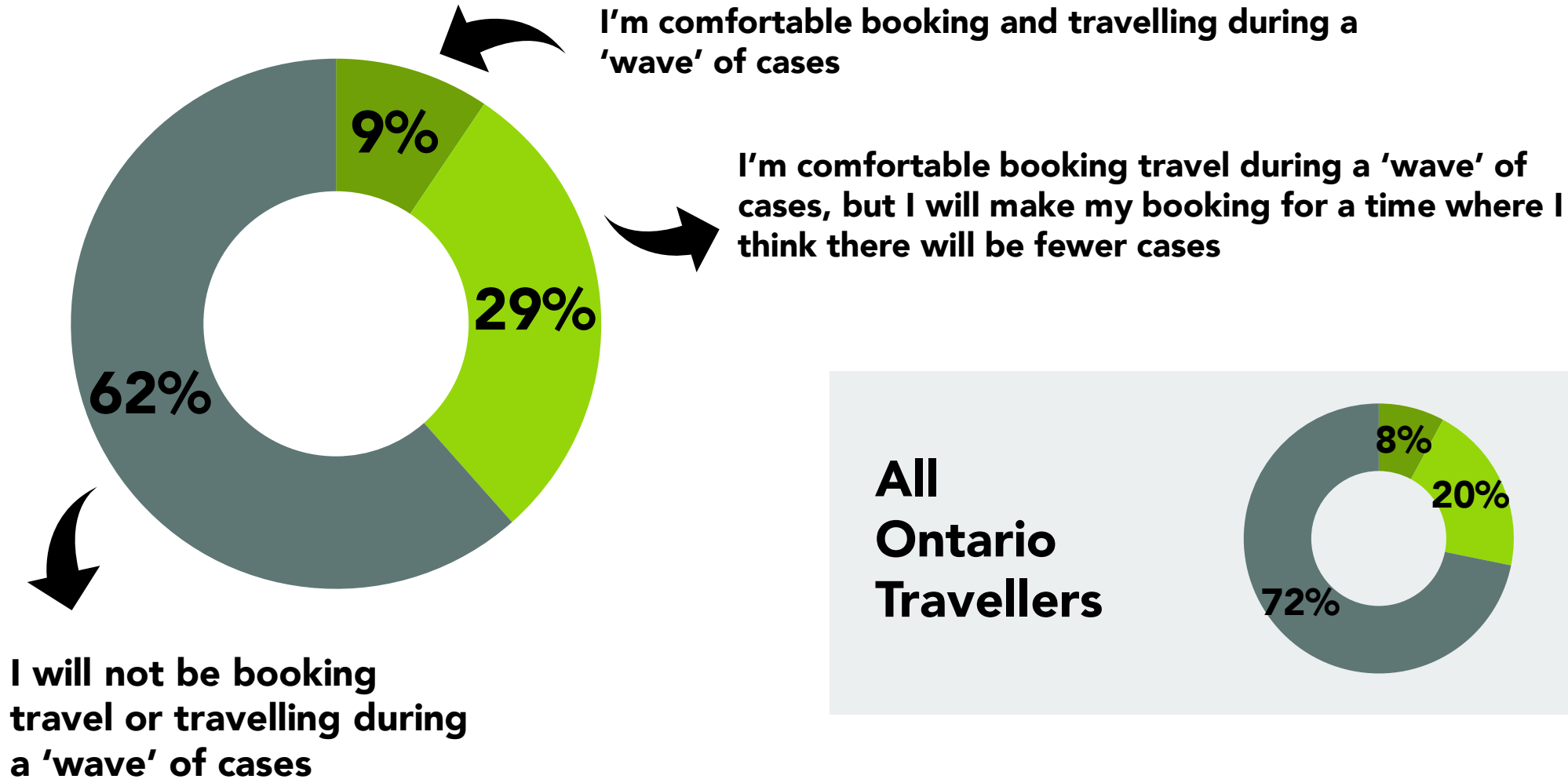
It's going to be more challenging to find places to stay and things to do that adhere to public health recommendations in the winter

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



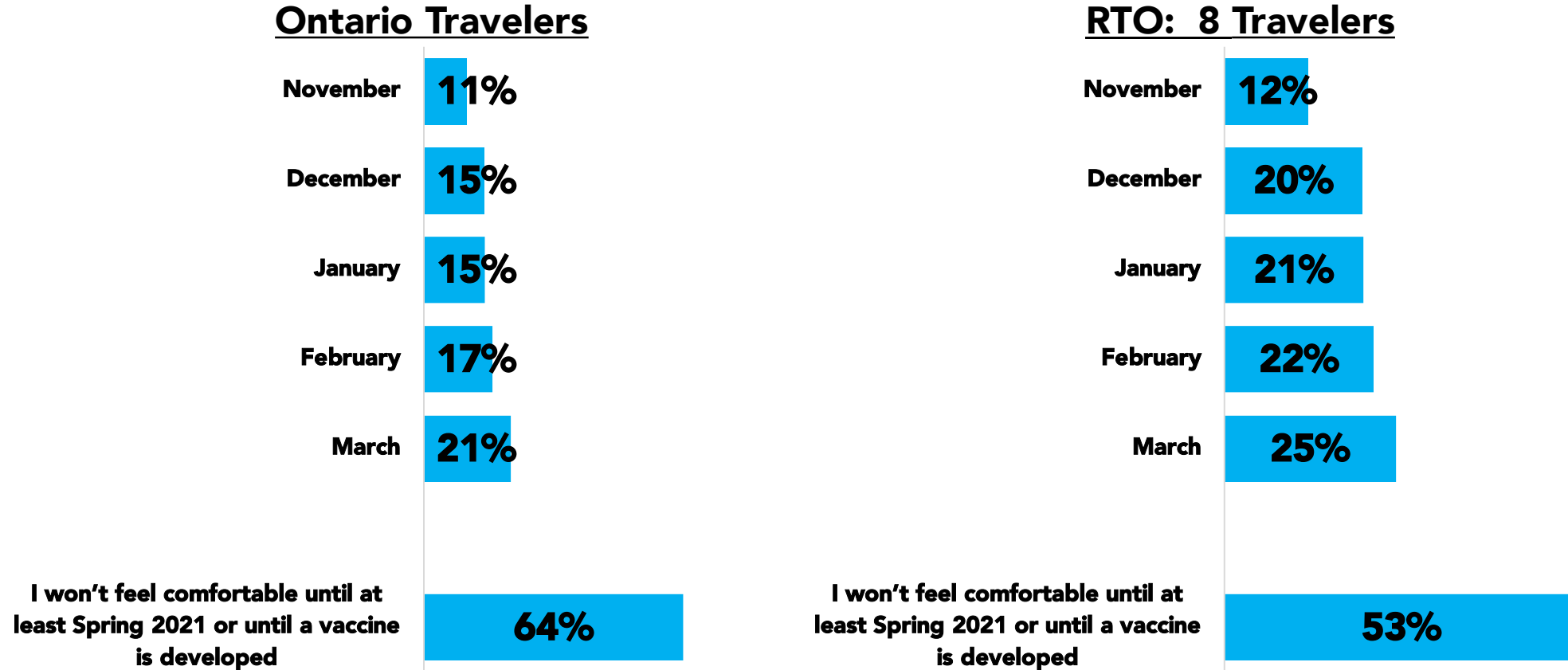
Which of the following do you agree with most?

A SURGE OF CASES MEANS THAT AROUND 60% WON'T BE TRAVELLING OR BOOKING DURING THAT TIME



Which of the following do you agree with most?

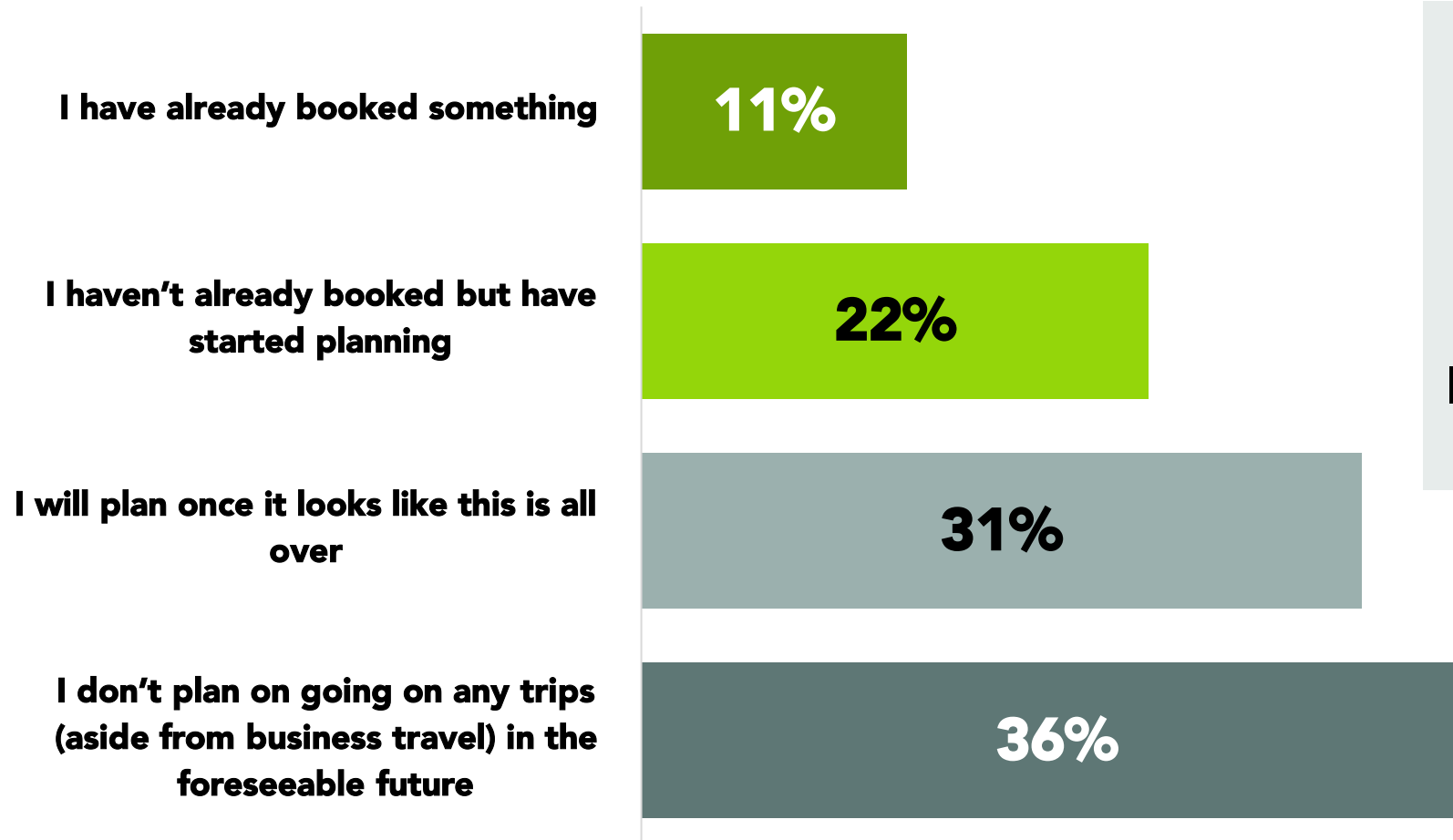
COMFORTABLE WITH ONTARIO TRAVEL PLANS?



Travellers are most comfortable making a trip in Spring 2021

As of right now, which months of the year do you feel comfortable making travel plans to a destination in Ontario? Select all that apply

BOOKINGS AND INTENTIONS

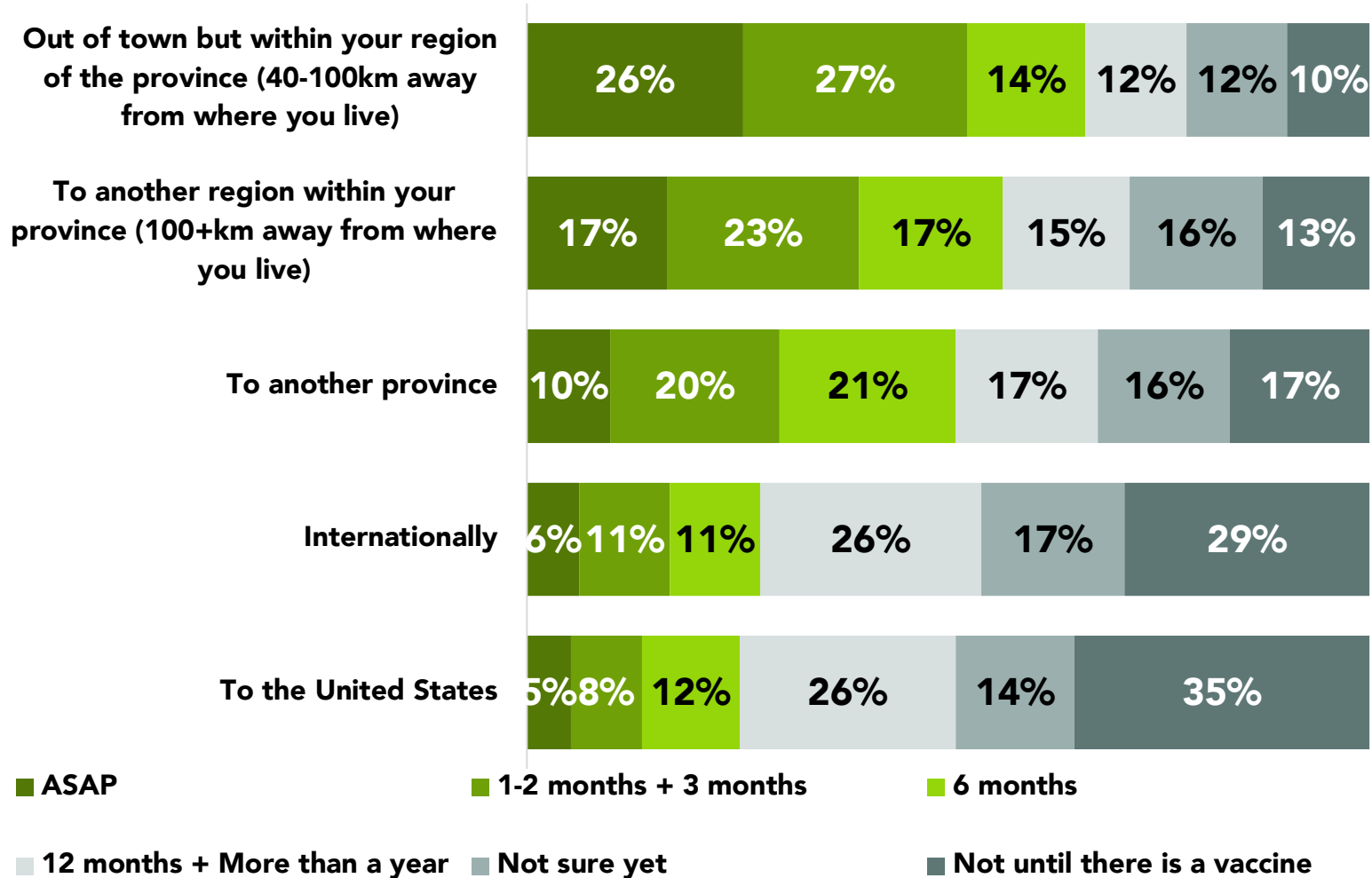


As with Ontarians, very few have actually booked travel so far.

One third have at least started to make plans.

Have you booked future travel plans (aside from business travel) or talked about future travel plans with your family or friends for when the COVID-19 pandemic is over?

TIME HORIZON FOR DIFFERENT DESTINATIONS

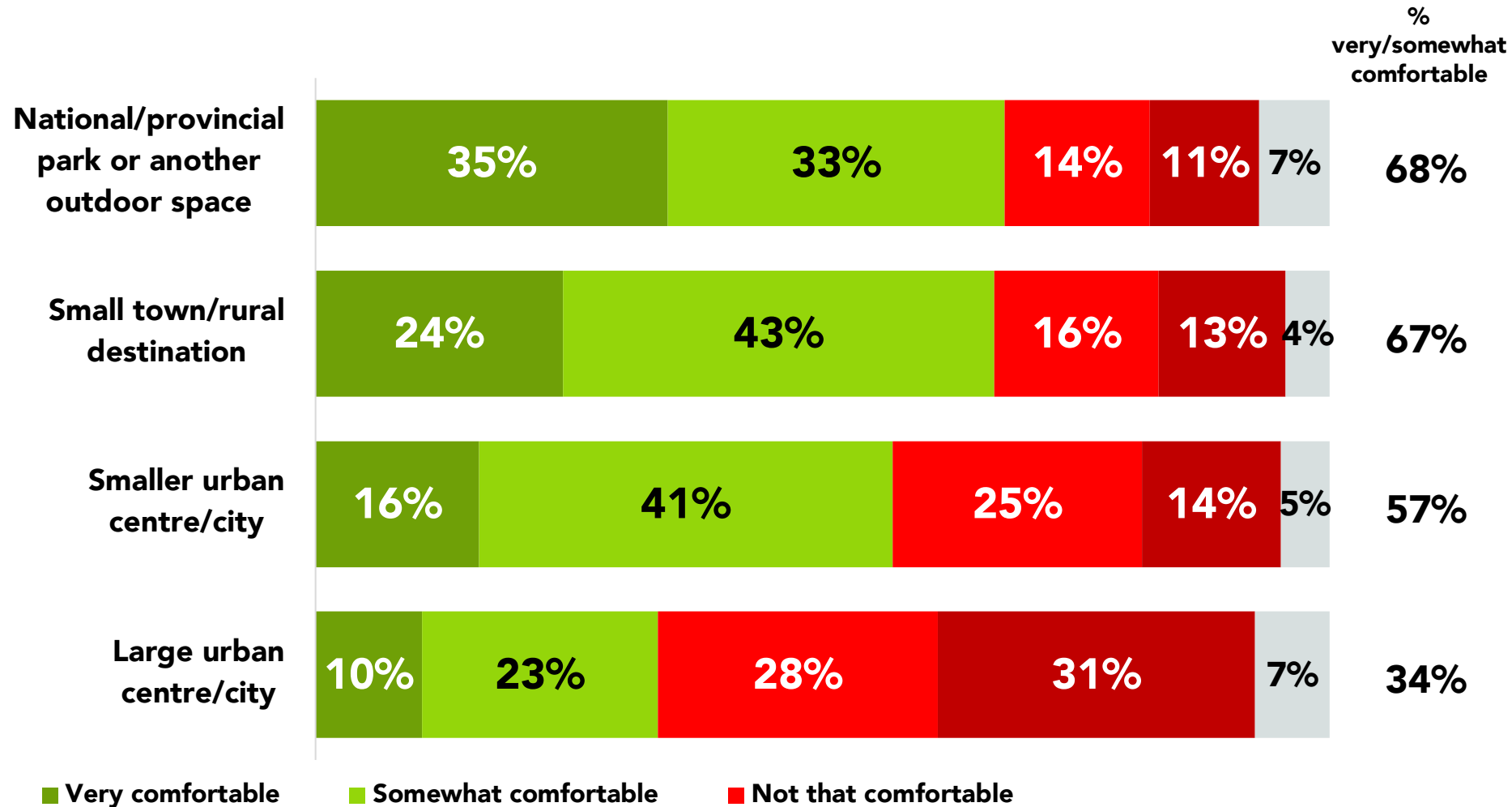


52% of travellers to your region say they will travel out of town but within their region this season.

39% of travellers to your region say they will travel out of their region this season.

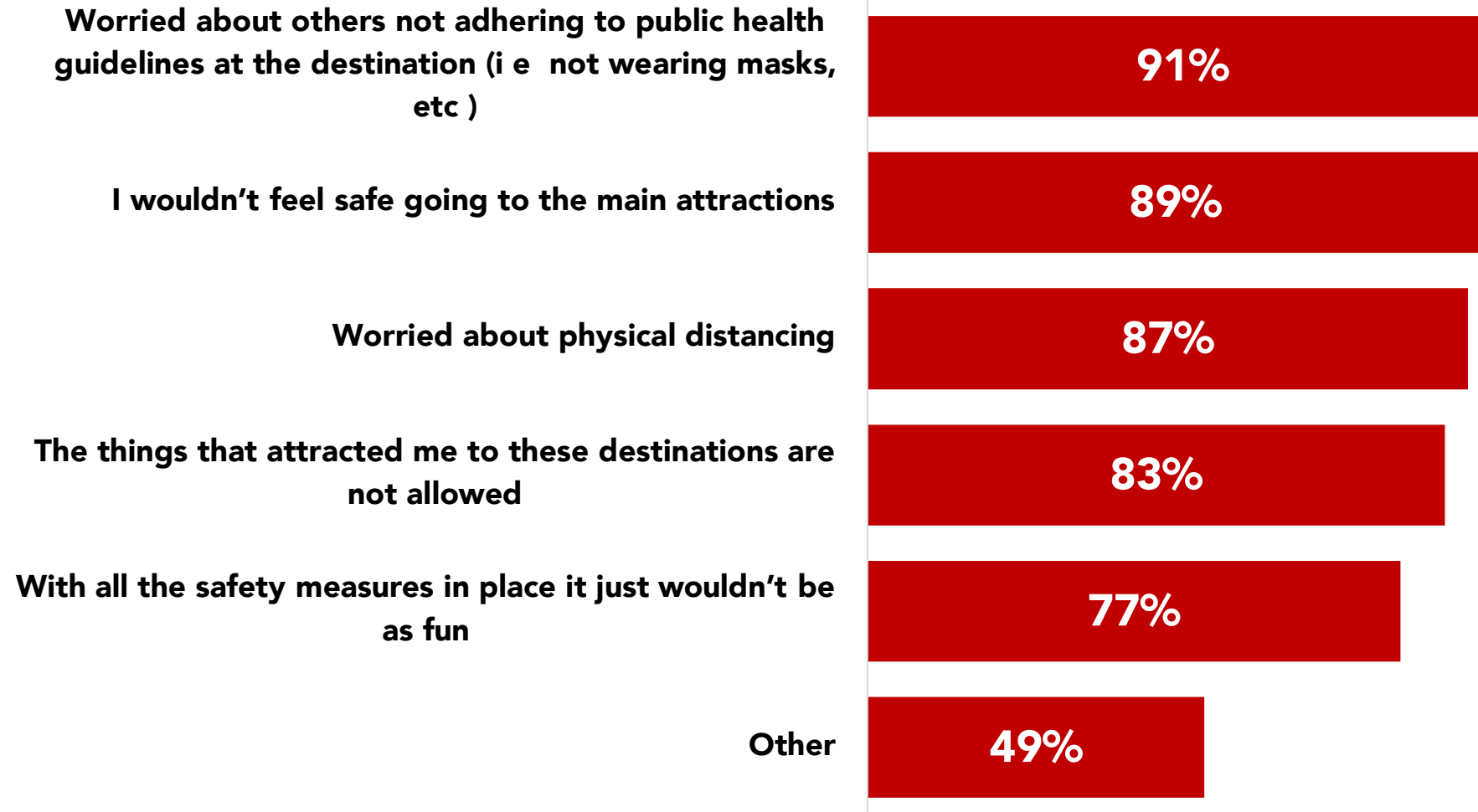
How long will it be before you feel comfortable travelling **not interested removed

LESS DENSE = MORE POPULAR



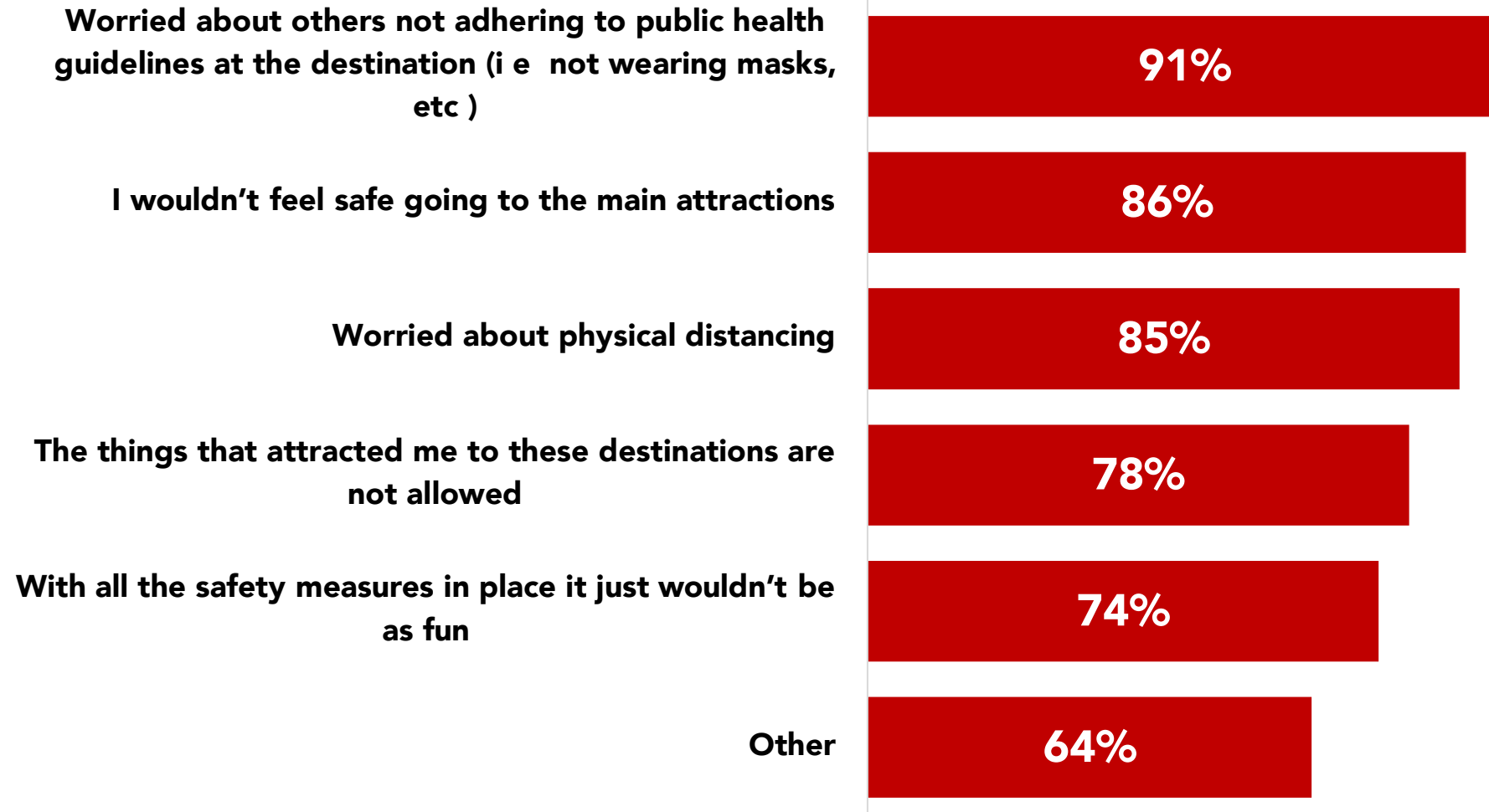
During the next 6 months, how comfortable would you be taking a trip to a...

REASONS FOR DISCOMFORT- SMALL TOWN/RURAL DESTINATION



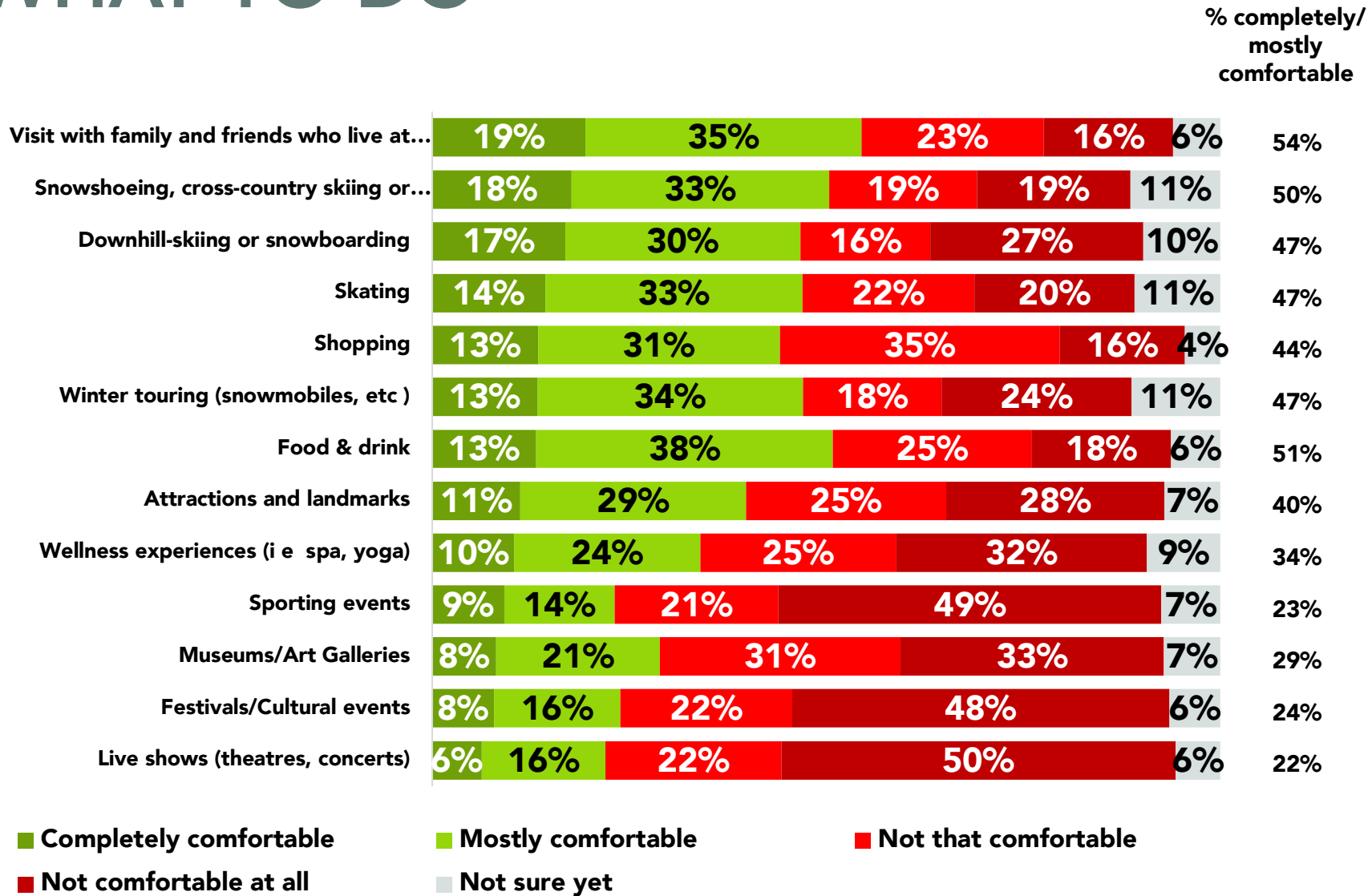
Why might you be uncomfortable travelling to a....

REASONS FOR DISCOMFORT- NATIONAL/PROVINCIAL PARK



Why might you be uncomfortable travelling to a....

WHAT TO DO

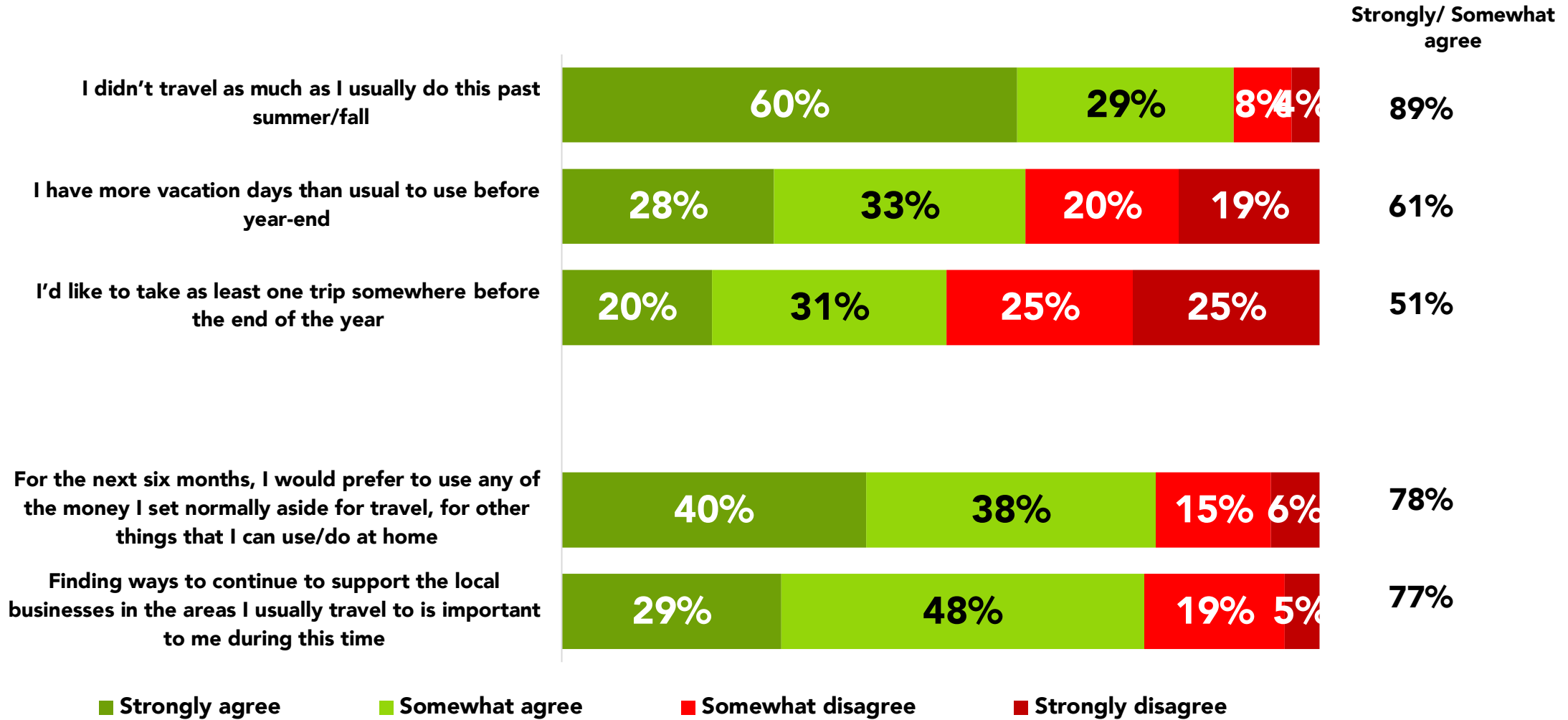


Visiting travelers are also most comfortable with outdoor activities/visiting with family/friends.

There is also a fairly high level of comfort with activities that involve winter sports

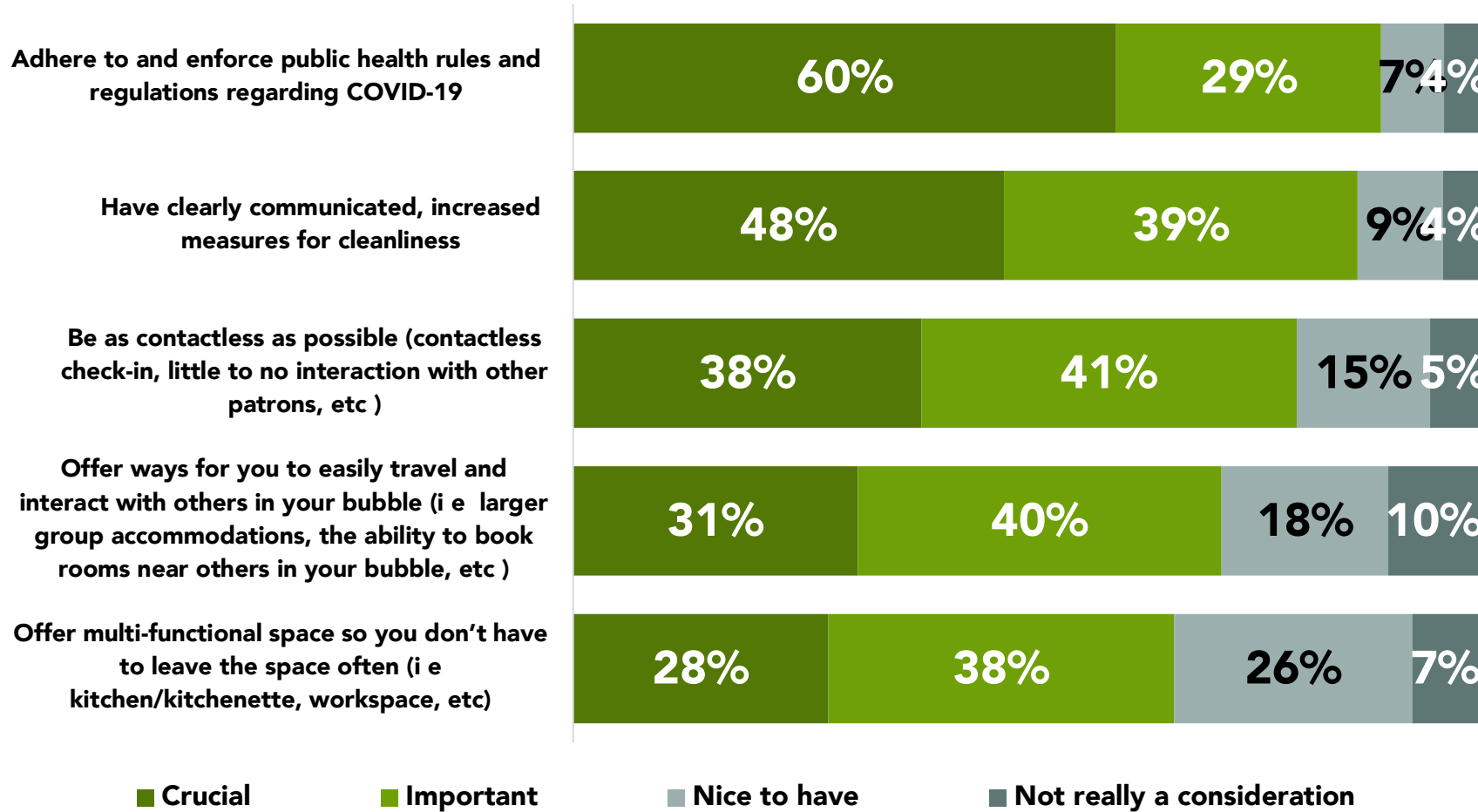
During the upcoming winter season, to what extent will you feel comfortable, if at all, doing the following activities

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



Do you agree or disagree with the following:

BOOKING ACCOMMODATIONS: ADHERENCE TO PUBLIC GUIDELINES IS KEY

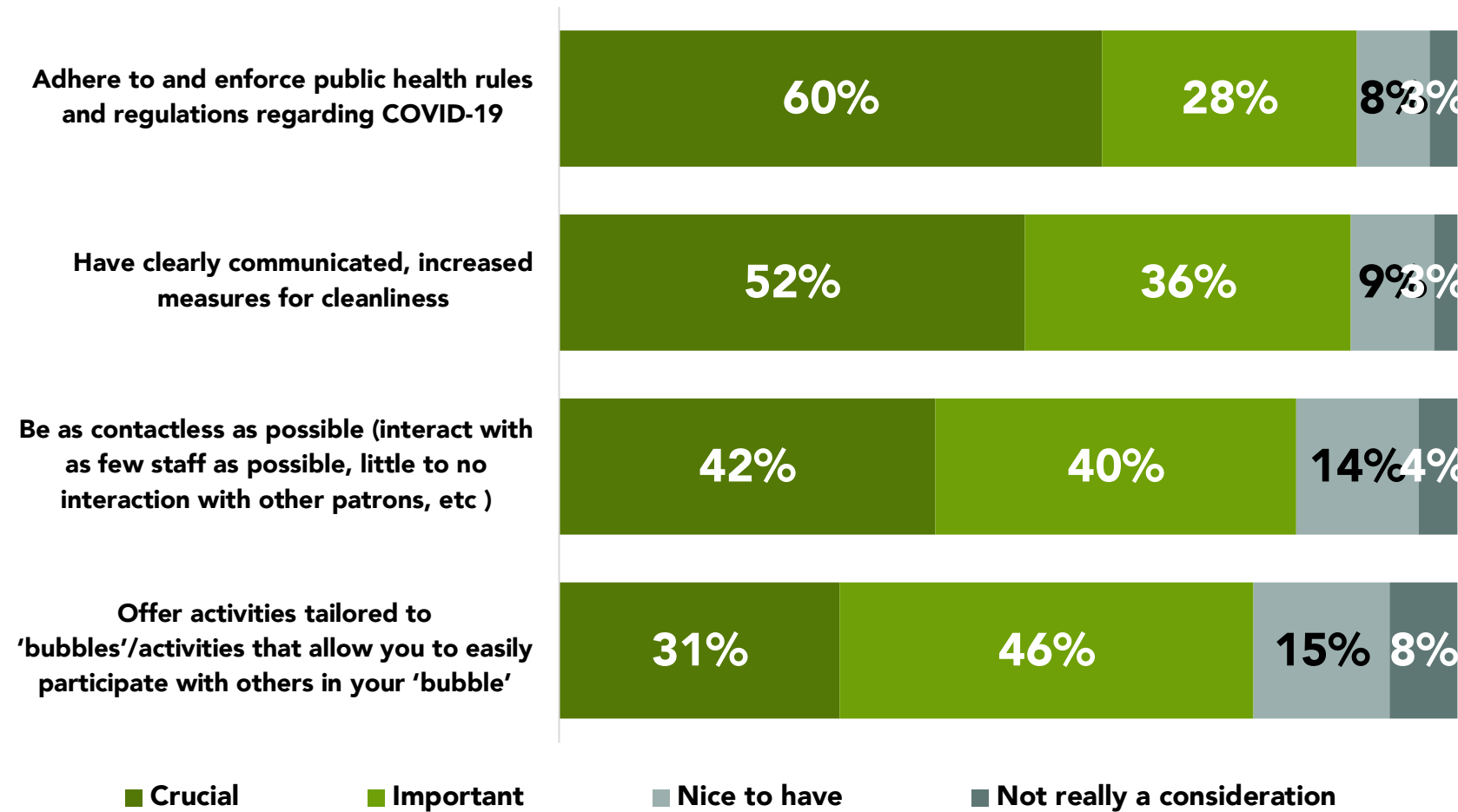


Above all else, accommodations should be adhering to public health rules and regulations.

89% of travellers to your region want the accommodation to adhere to and enforce public health rules and regulations regarding COVID-19.

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

BOOKING ACTIVITIES: ADHERENCE AND INFO ON CLEANING PROTOCOLS ALSO IMPORTANT



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

88% of travellers to your region want the activity to adhere to and enforce public health rules and regulations regarding COVID-19.

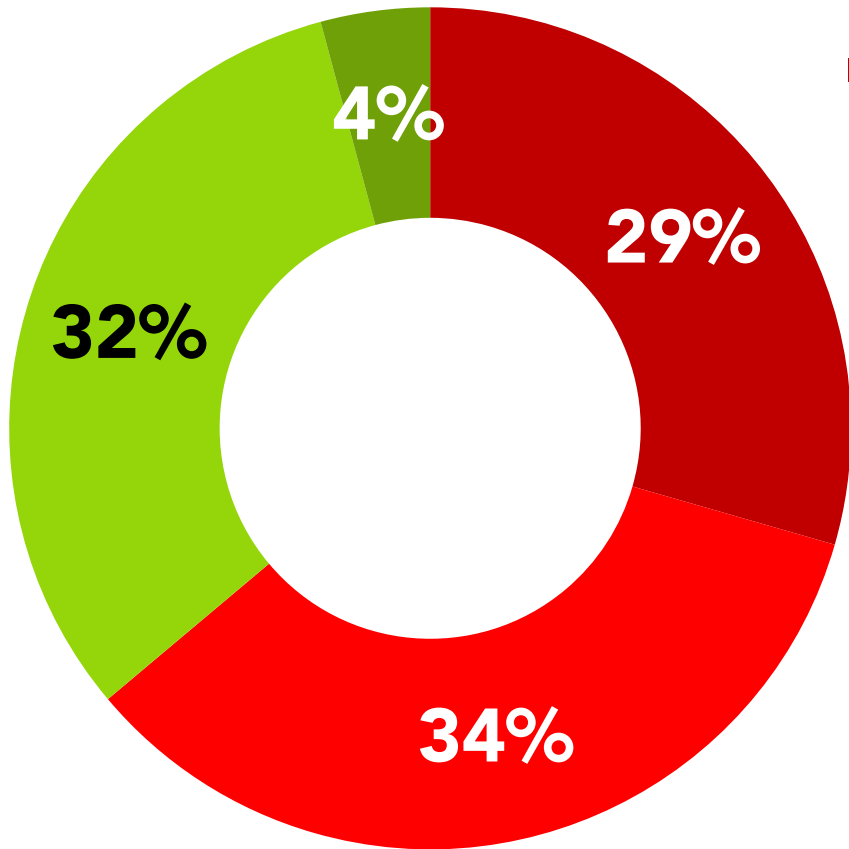
Contactless is also important or critical for 82% of travellers.

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

A dark, atmospheric photograph of an airport terminal. In the foreground, a black rolling suitcase stands upright on the right side. The background shows a busy airport with people walking, sitting on chairs, and standing near information screens. The lighting is dim, creating a moody and somewhat somber atmosphere. The overall scene suggests a place of transit and movement.

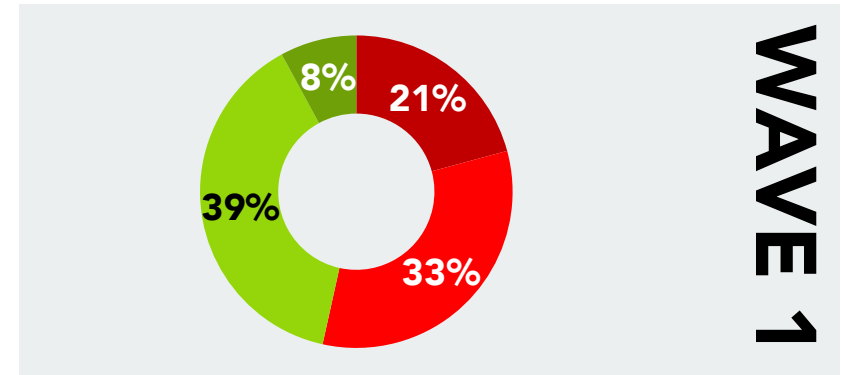
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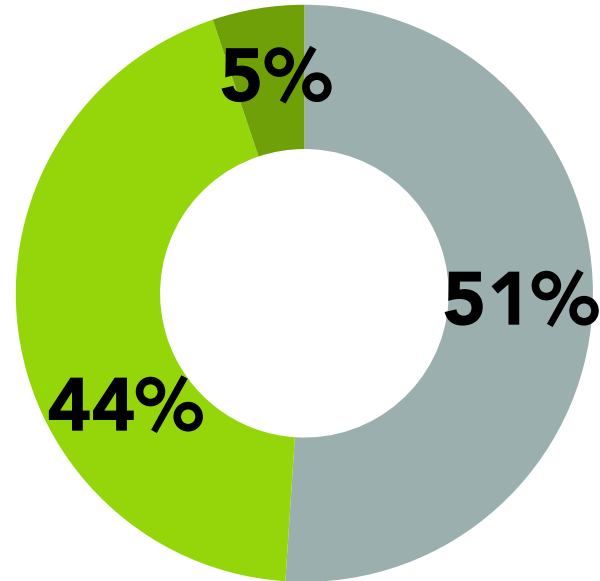


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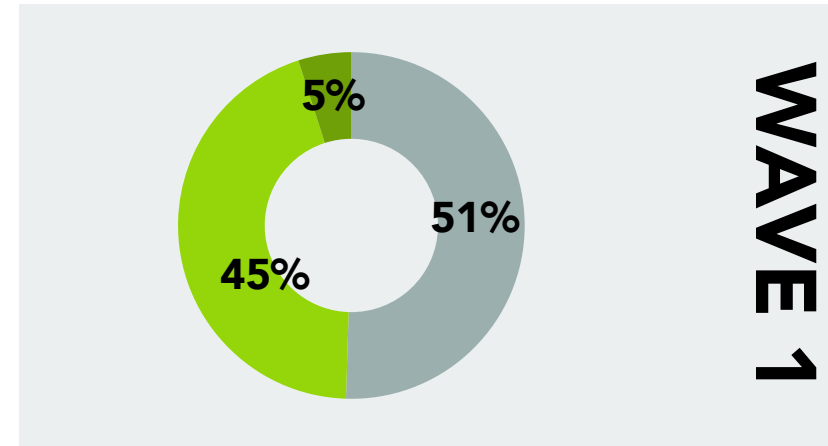
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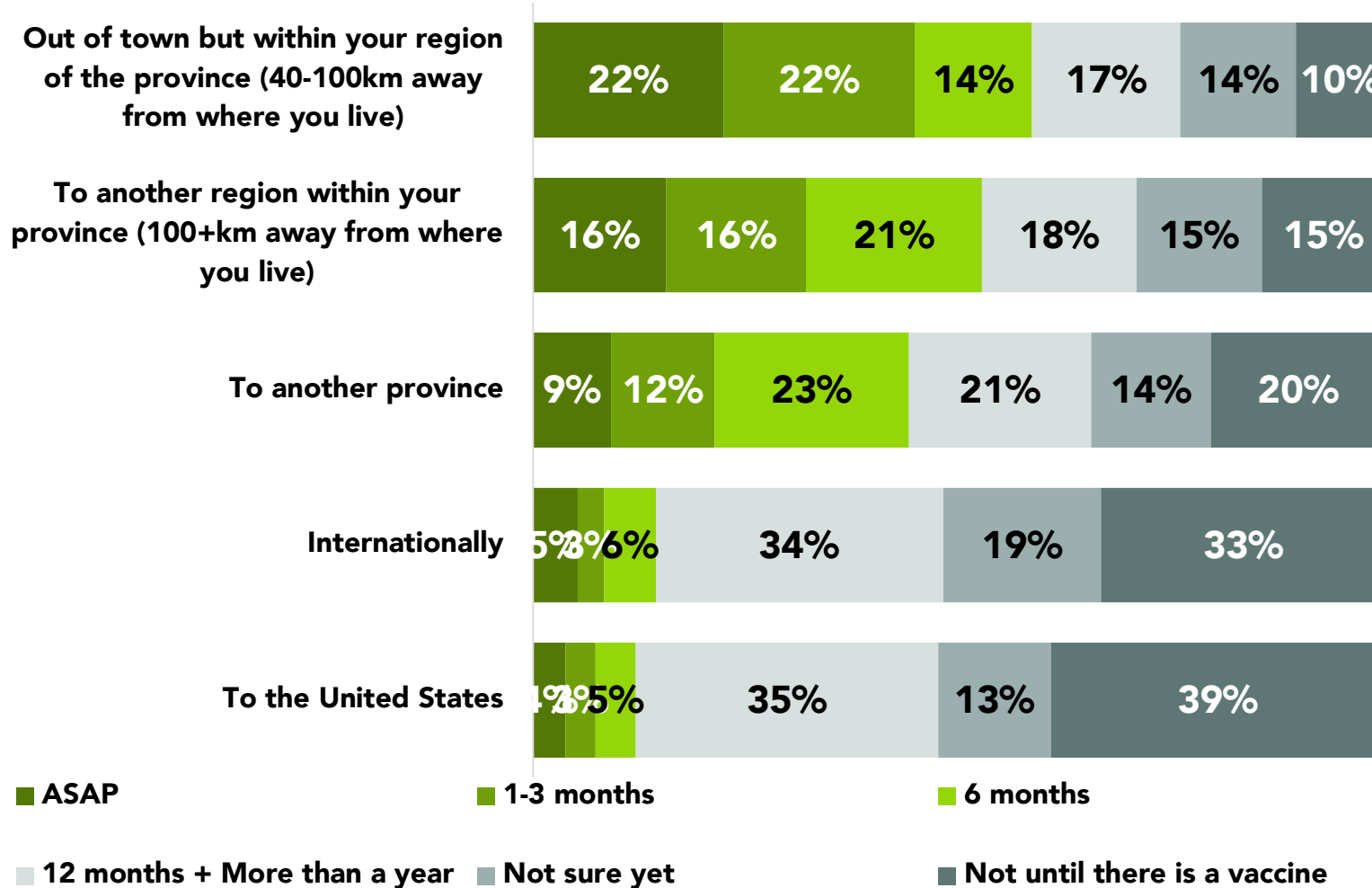
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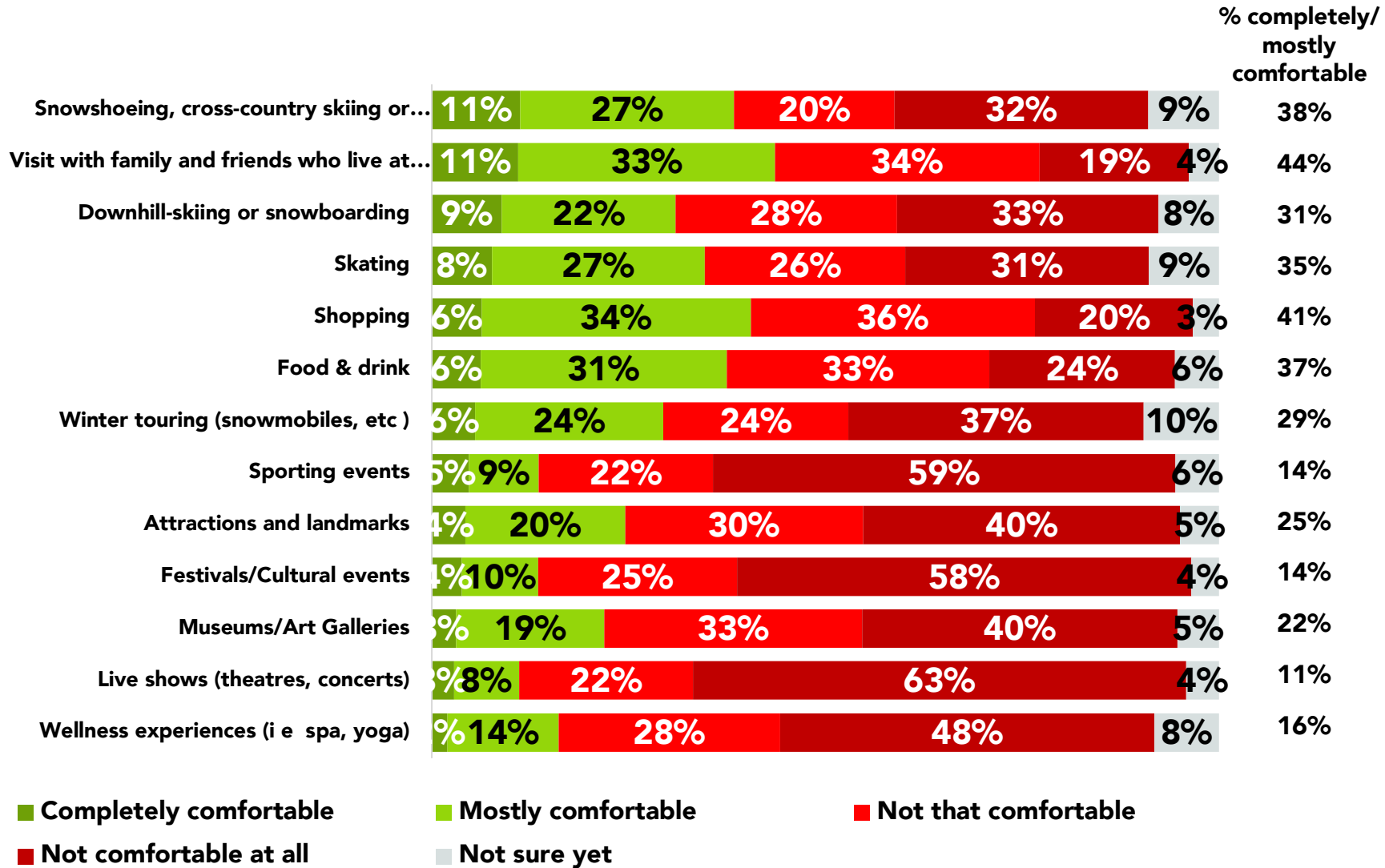
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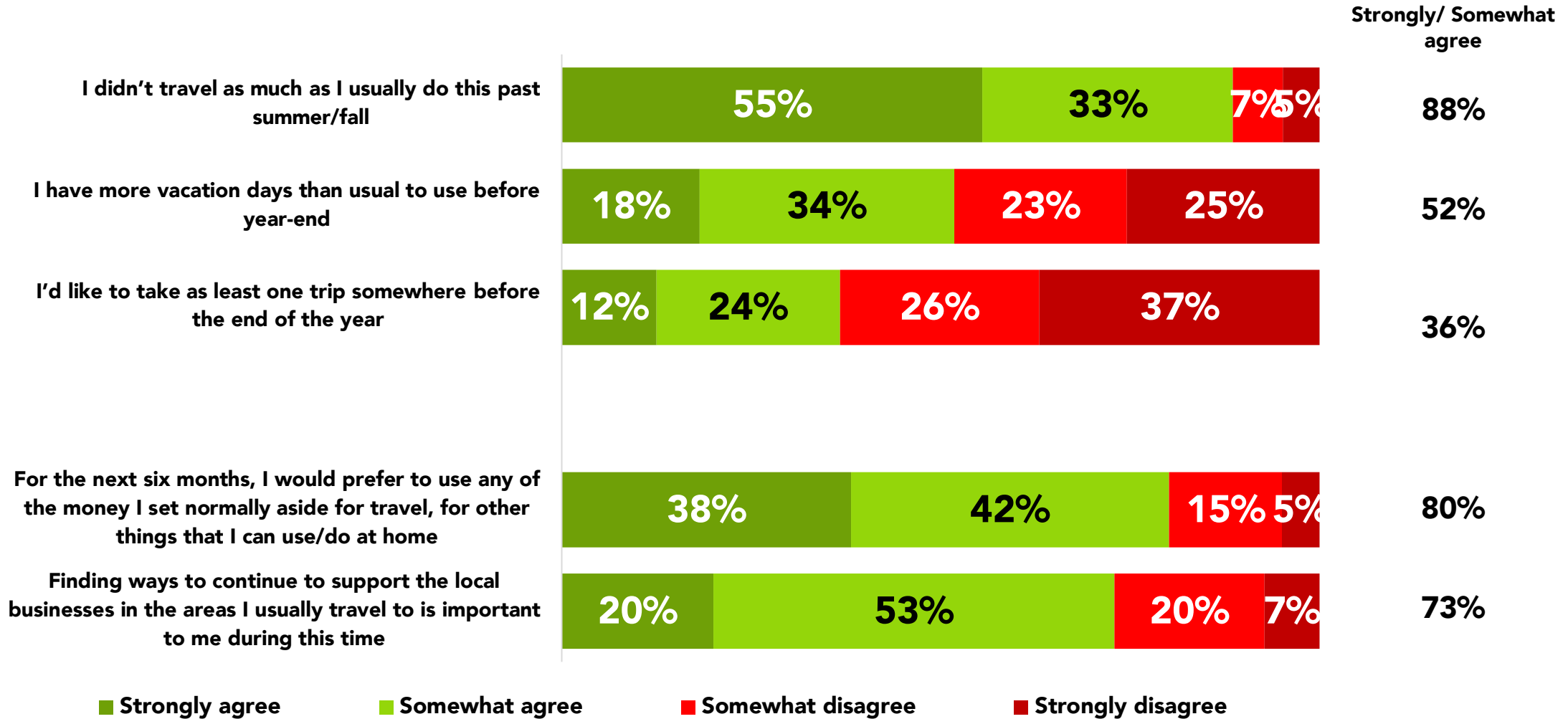
WHAT TO DO



Residents are most comfortable with outdoor activities like visiting with family and friends or snowshoeing, skiing or winter hiking.

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



Do you agree or disagree with the following: