

# 2020 Global Tourism Watch COVID Special Survey

Wave 1 - June 2020



Canada



# Content

## Key Findings

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- 3 Covid-19 Questions
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# COVID-19 Global Tourism Watch

This deck present topline results from special survey conducted in Canada on a general population basis, which is the first survey or three surveys planned between June and August 2020.

Amid the Covid-19 public health situation, the key objectives of this survey are to assess travel intentions, perceptions and behaviors in the context of managing travel and visitors in the context of Covid-19. The fielding for this survey was conducted between June 4 and June 19, 2020 .

This survey used the Global Tourism Watch (GTW) Canada study and incorporated many of its base questions to ensure comparability with past survey, including questions about:

- Past travel (incl. Net Promoter Score)
- Future travel (incl. Path to Purchase, Intention, Consideration)

A key difference with the GTW is that is also captures in-province travels, not just out-of-province or region travels:

# COVID-19 Global Tourism Watch (continue)

Two groups:

- Out-of-province travellers: Have taken a trip of 2 or more nights, including 1 night in paid accommodation, outside province in the last 3 years or intend to in the next year
- In-province travellers: Have not taken a trip outside province in the last 3 years nor intend to in the next year (this is a new group in the GTW)

Specific to COVID-19:

- Impact of COVID-19
- Market sizing (including where, when, how long & how far)
- Health & Safety practices: Tourism Businesses, Accommodation, Airlines
- Trip Activities, Accommodation & Transportation preferences, Insurance / Ticketing measures

Weighting:

- The results in this deck are weighted to the general population.
- Past GTW Canada results are weighted to the out-of-province travel population. As such, results in this deck may not be directly comparable to past GTW Canada results. Out-of-province weighted data are provided in SPSS files accessible the partners of this study.

# COVID-19 Global Tourism Watch (continue)

The study is targeting 9,040 completed surveys, including the provincial level targets shown in the table beside.

Partners:

- Destination British Columbia
- Travel Alberta
- Tourism Saskatchewan
- Travel Manitoba
- Destination Ontario/ Ontario Ministry of Heritage, Sport, Tourism and Culture Industries
- Ministère du tourisme du Québec
- Atlantic Canada Opportunities Agency
- Tourism Nova Scotia
- New Brunswick Tourism Heritage and Culture
- Tourism Prince Edward Island
- Newfoundland and Labrador Department of Tourism, Culture, Industry and Innovation

	Census % of population	Partner distribution n=9,050
<b>BC</b>	13.3%	1,500
<b>Alberta</b>	10.7%	1,500
<b>Saskatchewan</b>	2.9%	500
<b>Manitoba</b>	3.4%	500
<b>Ontario</b>	38.3%	2,100
<b>Quebec</b>	24.3%	1,500
<b>Nova Scotia</b>	2.9%	1450 (n=400 in NS, NB, NF and n=250 in PEI)
<b>New Brunswick</b>	2.3%	
<b>Newfoundland &amp; Labrador</b>	1.6%	
<b>Prince Edward Island</b>	.4%	

# Key Findings

Wave 1 - June 2020

# General trends

## **Economic impact awareness dominates, but many have also been personally impacted:**

- Financially, most Canadians have seen more of a big picture economic impact from COVID-19 and related restrictions than a direct, personal financial impact. Still, a significant number have been seriously personally impacted. Residents of Alberta are most likely to report a personal impact.

## **Youth less risk averse to travel:** In general, younger Canadians (18-34 and 35-54) are more open to travel than older Canadians (55+).

- Younger Canadians are prepared to travel sooner, travel further from home, and participate in more activities, and are less concerned with health and safety measures.

**Out-of-province travellers** are also generally more open to travel than respondents classified as in-province travellers.

## **More outdoor & nature-based activities, fewer crowds preferred:**

- Outdoor-based activities are most popular, across all three activity categories. Even in the City Activities category, “city green spaces like parks or gardens” is at the top of the list. Many larger group activities, like tours and festivals, are lower on the list.
- More likely to participate in outdoor activities (52%) than indoor activities (31%)

## **Spend less, do less:**

- More likely to limit daily activities (46%) than maximize daily activities (23%)
- More likely to spend less on vacations (38%) than spend more on vacations (14%) now

**Hypothesis: If we promote outdoor & uncrowded activities then we will be promoting activities that Canadian travellers want to do**

*Note: We still have analysis for our recommended target audience – as most likely to travel does not equal our best audience*

# Perceptions of safety depend on control of COVID-19

## Only 7% of Canadians say they feel safe travelling now.

- A vaccine for COVID-19 is by far the most important indicator that will make them feel safe travelling again, followed by a treatment for the illness.

## Large crowds to be avoided:

- Large crowds are a big detractor for travelling or participating in experiences while travelling (71% said it would make them less interested in travelling or participating in experiences while travelling).

## Almost all measures are seen as important – this could either indicate that a mixture is required for feeling safer, or that no one measure is seen as the most effective:

- When it comes to health and safety measures being implemented at restaurants, hotels, and airlines, a majority of Canadians think almost all of the listed measures are important.
- While about one-third to one-half of Canadians say that businesses, attractions and tours employing various health and safety measures would make them more interested in travelling or participating in experiences while travelling, a similar proportion are more neutral on those measures (i.e.: would not increase or decrease interest).



# Some Canadians are eager to travel, but not too far

While many Canadians (51%) are eager to start travelling again, they are not necessarily ready to do so now, or ready to venture too far.

Those who are ready to travel this summer generally plan to stay closer to home.

- **Distance:** Likelihood to travel decreases as distance from home increases.
- Exception: intent to travel to the US is marginally lower than intent to travel to other countries.
- **Local/in-province:** About half (48%) plan to travel to **nearby communities** this summer, and almost as many to **other parts of their province** of residence (43%).
- **Waiting for a vaccine:** A similar proportion say they will not leave the country until there is a vaccine – either to the US (44%) or to other international destinations (44%). This trend is highest in the Atlantic provinces and in BC.
- **Travel incentivization:** One-third (32%) of Canadians said that none of the listed financial incentives (e.g. discounts, waived fees, insurance offers) would encourage them to make a travel booking in the near future.

**If we promote domestically – both to in-province, out-of-province, and those who would normally travel internationally, then we will see more domestic travel than we would have otherwise expected (based on economic downturn)**

# Familiar comfort amid economic uncertainties

## Reconnecting with friends and relatives is top of mind:

- Once restrictions are relaxed, Canadians are most likely to travel to visit friends and relatives (48%) or for leisure (43%). Intent to travel for business reasons is very low.
- Intent to stay at the home of friends and family (46%) is far higher than intent to stay at any type of paid accommodations.

**Canadians are more likely to return to visit known destinations** (52%) than to travel to new destinations (37%).

## Slight preference for shorter trips, but longer trips are ok:

- Canadians are most likely to take shorter trips of 1 or 2 nights, but there is little variation in intent to travel by number of nights (ranging from 23% for a trip of 7+ nights to 36% for a trip of 1 night).

**Hypothesis:** Travel to visit friends in relatives does not necessarily mean a shorter trip or staying closer to home; in some cases, a leisure/please trip could be a more “cautious” trip than a VFR trip.

**If we determine how we can encourage VFR travellers to also spend more when on their trip, we will see greater overall revenue.**

# Different opportunities for in-province travel...

## Opportunity to encourage more in-province travel

- Among those classified as in-province travellers, **a significant number of Canadians have never visited any of the listed destinations within their own province of residence.**
  - This trend is highest in PEI (55%), Manitoba (45%), and New Brunswick (43%). Among the other provinces, approximately one-third have never visited any of those destinations

## Smaller, more rural destinations preferred for in-province travel, larger cities preferred for out-of-province travel

- In-province aided consideration is generally higher for more rural destinations than for larger cities. There is a similar trend with NPS scores – among in-province travellers, many larger cities have low or even negative NPS scores, while more rural destinations have much higher NPS scores.
- (Note: The reverse is true for out-of-province travel – for both aided consideration and NPS, larger cities score higher than more rural areas)
  - **Hypotheses:** There may be an awareness / or even a ‘its nearby so its not special’ phenomenon for in province travel. Residents may not be aware of some listed “tourism regions” within their own provinces. **If we promote now as the time to visit the in-province tourism regions, then we may see significant uptick in in-province travel.**

# ... than for out-of-province travel

## Larger cities are preferred for out-of-province travel

- In-province aided consideration is generally higher for more rural destinations than for larger cities. There is a similar trend with NPS scores – among in-province travellers, many larger cities have low or even negative NPS scores, while more rural destinations have much higher NPS scores.
- The reverse is true for out-of-province travel – for both aided consideration and NPS, larger cities score higher than more rural areas.

## Out-of-province travel intent is still closer to home:

- Canadians were generally more likely to say they plan to visit a nearby province this summer (e.g. travel between Alberta-BC, Ontario-Quebec, Atlantic provinces). Overall, BC is the province being considered most for out-of-province travel this summer.

**Hypothesis:** Possible connection with travel restrictions and current COVID-19 status (i.e. # of cases)

**Hypotheses:** It may be that the smaller / non-large city destinations have low awareness among out-of-province travellers.

**If we promote these smaller destinations, we may see an increase in out-of-province travel there.**

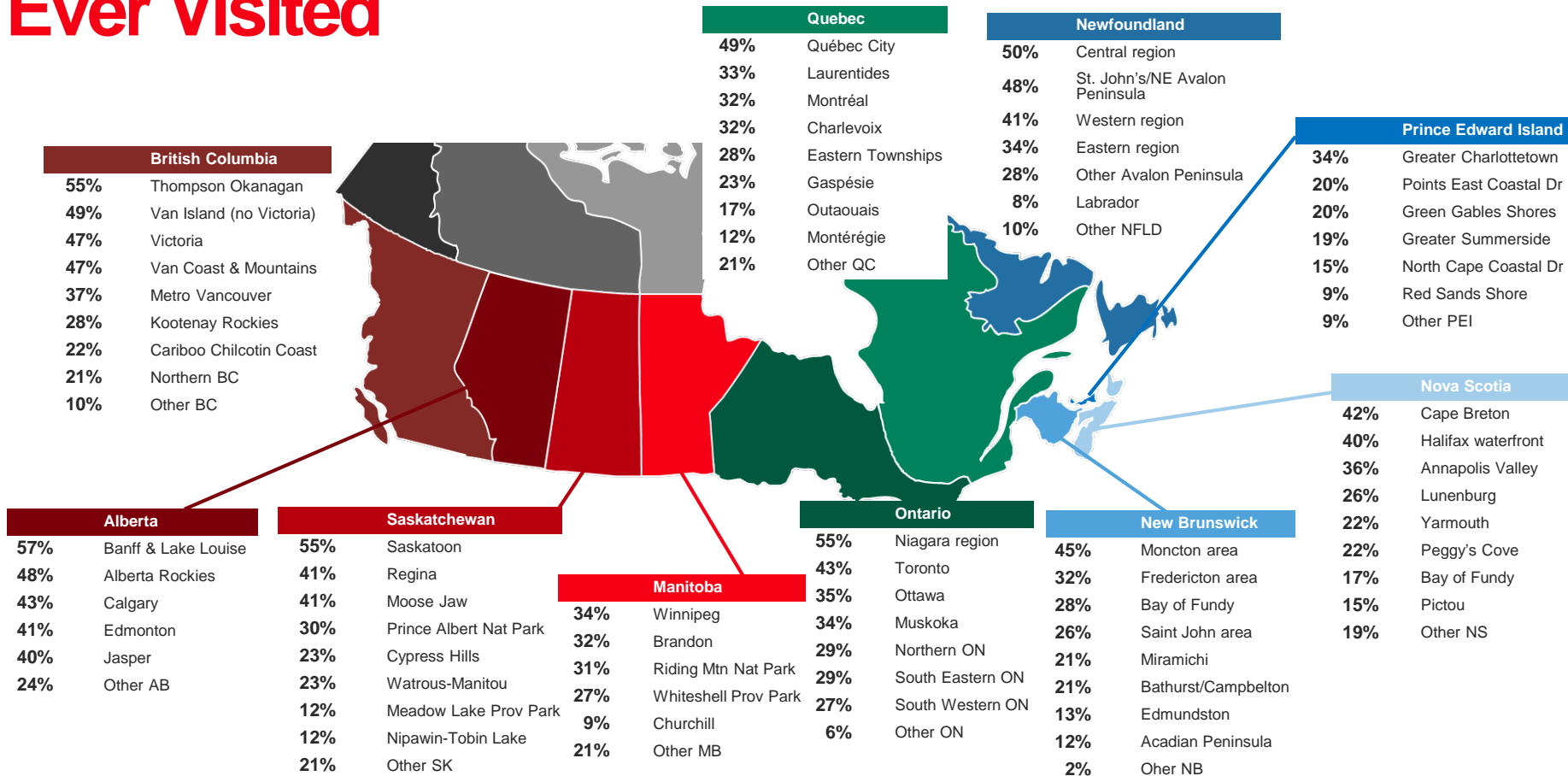
**If we promote adjacent provinces, we will see increases in travel.**

# 1. Results

## In-Province Tourism Travel Intentions

Wave 1 - June 2020

# Ever Visited



Base: In-province pleasure travellers

QS10b\_NEW\_IP In addition to the destinations that you mentioned you have travelled to in the past 3 years within <province of residence>, which of the following destinations have you ever visited on a vacation trip which was 1 or more nights long, where you spent at least 1 night in paid accommodation? (Select all that apply)

# Aided Consideration (Next Year) – Top 5 City/Region

	W1 (n=750)	W2 (n=xx)	W3 (n=xx)
British Columbia			
Vancouver Island (no Victoria)	<b>41%</b>		
Thompson Okanagan	<b>39%</b>		
Victoria	<b>36%</b>		
Vancouver Coast & Mountains	<b>33%</b>		
Metro Vancouver	<b>21%</b>		

	W1 (n=750)	W2 (n=xx)	W3 (n=xx)
Alberta			
Banff & Lake Louise	<b>53%</b>		
Alberta Rockies	<b>45%</b>		
Jasper	<b>44%</b>		
Calgary	<b>26%</b>		
Edmonton	<b>24%</b>		

	W1 (n=250)	W2 (n=xx)	W3 (n=xx)
Saskatchewan			
Saskatoon	<b>33%</b>		
Prince Albert Nat Park	<b>28%</b>		
Moose Jaw	<b>26%</b>		
Cypress Hills	<b>25%</b>		
Regina	<b>23%</b>		

	W1 (n=250)	W2 (n=xx)	W3 (n=xx)
Manitoba			
Riding Mountain Nat Park	<b>33%</b>		
Whiteshell Provincial Park	<b>31%</b>		
Winnipeg	<b>23%</b>		
Brandon	<b>22%</b>		
Churchill	<b>18%</b>		

	W1 (n=1050)	W2 (n=xx)	W3 (n=xx)
Ontario			
Niagara Region	<b>43%</b>		
Muskoka	<b>29%</b>		
Toronto	<b>27%</b>		
Ottawa	<b>24%</b>		
South Eastern Ontario	<b>19%</b>		

	W1 (n=750)	W2 (n=xx)	W3 (n=xx)
Quebec			
Québec City	<b>29%</b>		
Gaspésie	<b>24%</b>		
Charlevoix	<b>23%</b>		
Eastern Townships	<b>18%</b>		
Laurentides	<b>17%</b>		

(cont.)

Note: Please refer to detailed data tables for results from the full list of in-province destinations.

Base: In-province pleasure travellers

BVC1b\_IP You may have already mentioned this before, but which destinations would you seriously consider visiting in the next year? (Select all that apply)

# Aided Consideration (Next Year) – Top 5 City/Region (cont.)

	W1 (n=200)	W2 (n=xx)	W3 (n=xx)
New Brunswick			
Moncton Area	<b>40%</b>		
Bay of Fundy	<b>32%</b>		
Fredericton Area	<b>25%</b>		
Saint John Area	<b>21%</b>		
Miramichi	<b>19%</b>		

	W1 (n=200)	W2 (n=xx)	W3 (n=xx)
Nova Scotia			
Cape Breton	<b>40%</b>		
Halifax Waterfront	<b>37%</b>		
Annapolis Valley	<b>36%</b>		
Peggy's Cove	<b>28%</b>		
Lunenburg	<b>27%</b>		

	W1 (n=125)	W2 (n=xx)	W3 (n=xx)
Prince Edward Island			
Points East Coastal Drive	<b>36%</b>		
North Cape Coastal Drive	<b>34%</b>		
Greater Charlottetown	<b>28%</b>		
Green Gables Shore	<b>25%</b>		
Greater Summerside	<b>22%</b>		

	W1 (n=200)	W2 (n=xx)	W3 (n=xx)
Newfoundland			
Western Region	<b>41%</b>		
Central Region	<b>38%</b>		
St. John's / NE Avalon	<b>29%</b>		
Other Avalon Peninsula	<b>25%</b>		
Eastern Region	<b>24%</b>		

Note: Please refer to detailed data tables for results from the full list of in-province destinations.

Base: In-province pleasure travellers

BVC1b\_IP You may have already mentioned this before, but which destinations would you seriously consider visiting in the next year? (Select all that apply)



# NET Active Planning – Top 5 City/Region

	W1 (n=750)	W2 (n=xx)	W3 (n=xx)
British Columbia			
Okanagan	<b>17%</b>		
Victoria	<b>14%</b>		
Vancouver Island (no Victoria)	<b>12%</b>		
Metro Vancouver	<b>12%</b>		
Cariboo Chilcotin Coast	<b>12%</b>		

	W1 (n=750)	W2 (n=xx)	W3 (n=xx)
Alberta			
Calgary	<b>16%</b>		
Edmonton	<b>15%</b>		
Alberta Rockies	<b>15%</b>		
Banff & Lake Louise	<b>14%</b>		
Jasper	<b>14%</b>		

	W1 (n=250)	W2 (n=xx)	W3 (n=xx)
Saskatchewan			
Saskatoon	<b>13%</b>		
Moose Jaw	<b>11%</b>		
Cypress Hills	<b>11%</b>		
Regina	<b>10%</b>		
Prince Albert Nat Park	<b>8%</b>		

	W1 (n=250)	W2 (n=xx)	W3 (n=xx)
Manitoba			
Winnipeg	<b>18%</b>		
Riding Mountain Nat Park	<b>10%</b>		
Whiteshell Provincial Park	<b>9%</b>		
Brandon	<b>8%</b>		
Churchill	<b>5%</b>		

	W1 (n=1050)	W2 (n=xx)	W3 (n=xx)
Ontario			
Toronto	<b>14%</b>		
Muskoka	<b>11%</b>		
Niagara Region	<b>11%</b>		
Ottawa	<b>11%</b>		
South Eastern Ontario	<b>9%</b>		

	W1 (n=750)	W2 (n=xx)	W3 (n=xx)
Quebec			
Québec City	<b>11%</b>		
Charlevoix	<b>9%</b>		
Gaspésie	<b>9%</b>		
Montréal	<b>9%</b>		
Laurentides	<b>7%</b>		

(cont.)

Note: NET Active Planning = respondents who are gathering information, planning a visit, making arrangements, or already booked.

Note: Please refer to detailed data tables for results from the full list of in-province destinations.

Base: In-province pleasure travellers

17 MP1\_IP Which of the following best describes your current situation when thinking about each of the following destinations for a vacation trip? (Select all that apply)



# NET Active Planning – Top 5 City/Region (cont.)

	W1 (n=200)	W2 (n=xx)	W3 (n=xx)
New Brunswick			
Moncton Area	<b>16%</b>		
Saint John Area	<b>16%</b>		
Acadian Peninsula	<b>11%</b>		
Miramichi Area	<b>10%</b>		
Edmundston Area	<b>9%</b>		

	W1 (n=200)	W2 (n=xx)	W3 (n=xx)
Nova Scotia			
Cape Breton	<b>22%</b>		
Peggy's Cove	<b>14%</b>		
Halifax Waterfront	<b>14%</b>		
Annapolis Valley	<b>12%</b>		
Yarmouth	<b>9%</b>		

	W1 (n=125)	W2 (n=xx)	W3 (n=xx)
Prince Edward Island			
Greater Charlottetown	<b>16%</b>		
Green Gables Shore	<b>12%</b>		
Greater Summerside	<b>11%</b>		
North Cape Coastal Drive	<b>10%</b>		
Points East Coastal Drive	<b>10%</b>		

	W1 (n=200)	W2 (n=xx)	W3 (n=xx)
Newfoundland			
Central Region	<b>20%</b>		
Western Region	<b>19%</b>		
St. John's / NE Avalon Peninsula	<b>14%</b>		
Other Avalon Peninsula	<b>11%</b>		
Eastern Region	<b>11%</b>		

Note: NET Active Planning = respondents who are gathering information, planning a visit, making arrangements, or already booked.

Note: Please refer to detailed data tables for results from the full list of in-province destinations.

Base: In-province pleasure travellers

**18** MP1\_IP Which of the following best describes your current situation when thinking about each of the following destinations for a vacation trip? (Select all that apply)



# Net Promoter Score (NPS) – Top 5 City/Region

	W1 (n=750)	W2 (n=xx)	W3 (n=xx)
British Columbia			
Victoria	<b>+29</b>		
Vancouver Coast & Mountains	<b>+22</b>		
Vancouver Island (no Victoria)	<b>+22</b>		
Thompson Okanagan	<b>+19</b>		
Metro Vancouver	<b>+4</b>		

	W1 (n=750)	W2 (n=xx)	W3 (n=xx)
Alberta			
Alberta Rockies	<b>+44</b>		
Banff & Lake Louise	<b>+41</b>		
Jasper	<b>+38</b>		
Calgary	<b>-19</b>		
Edmonton	<b>-25</b>		

	W1 (n=250)	W2 (n=xx)	W3 (n=xx)
Saskatchewan			
Cypress Hills	<b>+42</b>		
Prince Albert Nat Park	<b>+38</b>		
Watrous-Manitou	<b>+26</b>		
Moose Jaw	<b>-2</b>		
Meadow Lake Provincial Park	<b>-6</b>		

	W1 (n=250)	W2 (n=xx)	W3 (n=xx)
Manitoba			
Whiteshell Provincial Park	<b>+22</b>		
Riding Mountain Provincial Park	<b>+20</b>		
Churchill	<b>-4</b>		
Winnipeg	<b>-28</b>		
Brandon	<b>-39</b>		

	W1 (n=1050)	W2 (n=xx)	W3 (n=xx)
Ontario			
Niagara Region	<b>+28</b>		
Muskoka	<b>+15</b>		
Ottawa	<b>+7</b>		
Toronto	<b>+6</b>		
South Eastern Ontario	<b>+4</b>		

	W1 (n=750)	W2 (n=xx)	W3 (n=xx)
Quebec			
Charlevoix	<b>+48</b>		
Gaspésie	<b>+47</b>		
Eastern Townships	<b>+35</b>		
Québec City	<b>+30</b>		
Laurentides	<b>+22</b>		

(cont.)

Note: Net Promoter Score (NPS): This measure has an 11pt scale (0-10). The score is calculated by subtracting Detractors (0-6 rating) from Promoters (9-10 rating). Asked of past visitors only.

Note: Please refer to detailed data tables for results from the full list of in-province destinations.

Base: In-province pleasure travellers who have visited destination

MP11\_CA\_NEW1\_IP. Whether you have visited or not, how likely are you to recommend each of the following vacation destinations to a friend, family member or colleague?

# Net Promoter Score (NPS) – Top 5 City/Region (cont.)

	W1 (n=200)	W2 (n=xx)	W3 (n=xx)
New Brunswick			
Bay of Fundy Area	<b>+48</b>		
Acadian Peninsula	<b>+29</b>		
Moncton Area	<b>+23</b>		
Fredericton Area	<b>+21</b>		
Edmundston Area	<b>-8</b>		

	W1 (n=200)	W2 (n=xx)	W3 (n=xx)
Nova Scotia			
Bay of Fundy	<b>+55</b>		
Peggy's Cove	<b>+52</b>		
Halifax Waterfront	<b>+52</b>		
Lunenburg	<b>+47</b>		
Cape Breton	<b>+46</b>		

	W1 (n=125)	W2 (n=xx)	W3 (n=xx)
Prince Edward Island			
Red Sands Shore Region	<b>+48</b>		
North Cape Coastal Drive	<b>+46</b>		
Green Gables Shore	<b>+31</b>		
Greater Charlottetown	<b>+12</b>		
Points East Coastal Drive	<b>+9</b>		

	W1 (n=200)	W2 (n=xx)	W3 (n=xx)
Newfoundland			
Western Region	<b>+38</b>		
Other Avalon Peninsula	<b>+14</b>		
Labrador	<b>+11</b>		
Central Region	<b>+6</b>		
Eastern Region	<b>+5</b>		

Note: Net Promoter Score (NPS): This measure has an 11pt scale (0-10). The score is calculated by subtracting Detractors (0-6 rating) from Promoters (9-10 rating). Asked of past visitors only.

Note: Please refer to detailed data tables for results from the full list of in-province destinations.

Base: In-province pleasure travellers who have visited destination

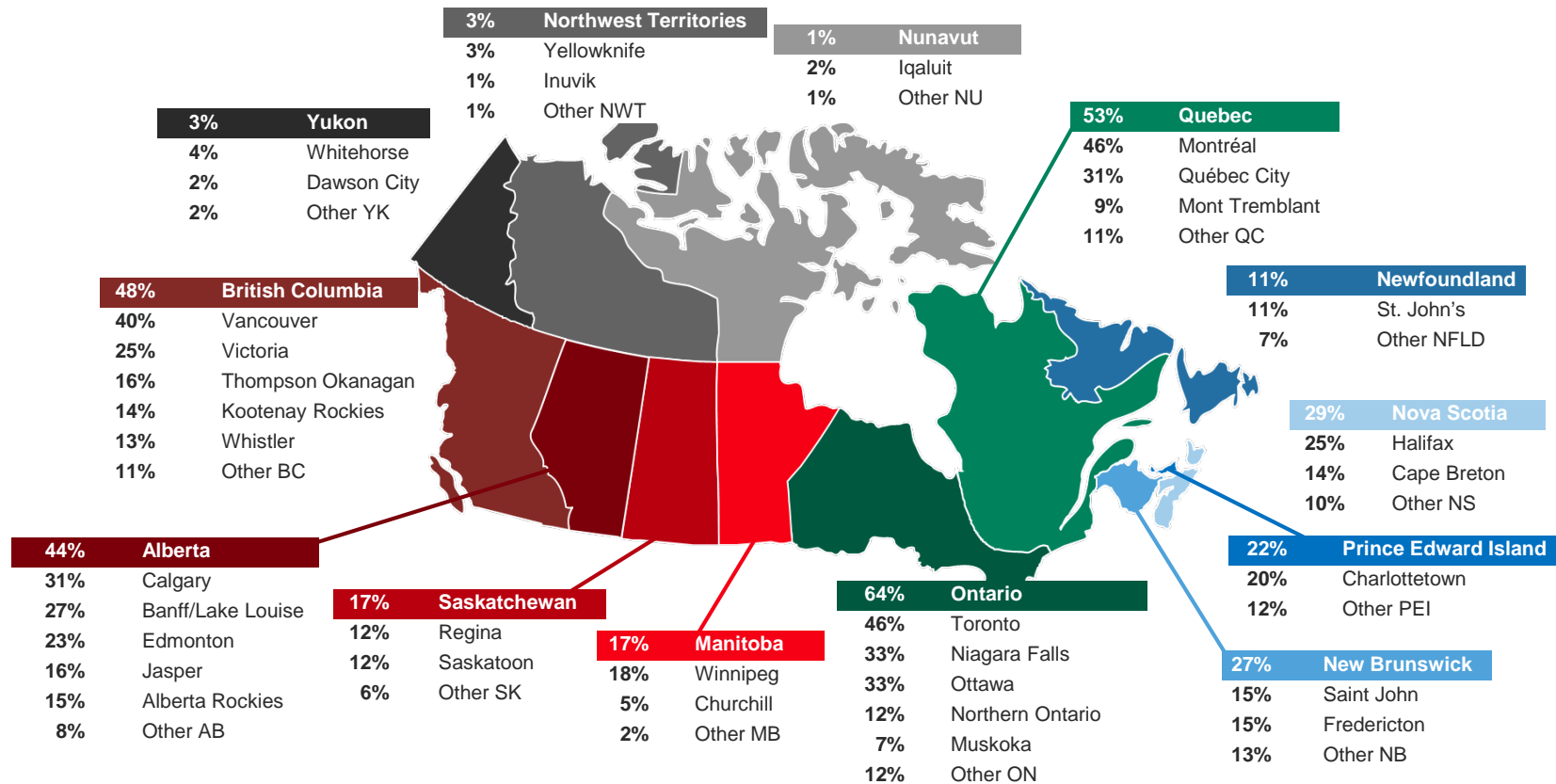
MP11\_CA\_NEW1\_IP. Whether you have visited or not, how likely are you to recommend each of the following vacation destinations to a friend, family member or colleague?

# 2. Results

# Out-of-Province Tourism Travel Intentions

Wave 1 - June 2020

# Ever Visited



Base: Out-of-province pleasure travellers (past 3 years), excluding residents from each province (Wave 1=3475-4400)

S10a\_NEW\_OP and S10b\_NEW\_OP In addition to the destinations that you mentioned you have travelled to in the past 3 years, which of the following destinations have you ever visited on a vacation trip which was 2 or more nights long, where you spent at least 1 night in paid accommodation? (Select all that apply)

# Aided Consideration (Next Year) – by City/Region

	W1	W2	W3
British Columbia	47%		
Vancouver	43%		
Victoria	27%		
Kootenay Rockies	19%		
Whistler	15%		
Thompson Okanagan	15%		
Alberta	31%		
Banff & Lake Louise	30%		
Calgary	26%		
Edmonton	19%		
Alberta Rockies	17%		
Jasper	16%		
Saskatchewan	7%		
Regina	11%		
Saskatoon	11%		

	W1	W2	W3
Manitoba	8%		
Winnipeg	16%		
Churchill	5%		
Ontario	43%		
Toronto	32%		
Niagara Falls	27%		
Ottawa	20%		
Muskoka	8%		
Northern Ontario	7%		
Quebec	30%		
Montréal	33%		
Québec City	27%		
Mont Tremblant	9%		
New Brunswick	18%		
Saint John	17%		
Fredericton	14%		

	W1	W2	W3
Nova Scotia	26%		
Halifax	27%		
Cape Breton	19%		
Prince Edward Island	21%		
Charlottetown	28%		
Newfoundland	16%		
St. John's	23%		
Yukon	6%		
Whitehorse	12%		
Dawson City	7%		
Northwest Territories	4%		
Yellowknife	12%		
Inuvik	4%		
Nunavut	2%		
Iqaluit	11%		

# NET Active Planning – by City/Region

	W1	W2	W3
British Columbia	15%		
Vancouver	15%		
Victoria	13%		
Kootenay Rockies	8%		
Whistler	7%		
Thompson Okanagan	6%		
Alberta	16%		
Edmonton	13%		
Banff & Lake Louise	13%		
Alberta Rockies	10%		
Calgary	9%		
Jasper	9%		
Saskatchewan	8%		
Regina	6%		
Saskatoon	4%		

	W1	W2	W3
Manitoba	7%		
Winnipeg	10%		
Churchill	4%		
Ontario	16%		
Niagara Falls	12%		
Toronto	11%		
Ottawa	8%		
Northern Ontario	5%		
Muskoka	3%		
Quebec	12%		
Montréal	10%		
Québec City	10%		
Mont Tremblant	9%		
New Brunswick	11%		
Fredericton	6%		
Saint John	6%		

	W1	W2	W3
Nova Scotia	13%		
Halifax	10%		
Cape Breton	7%		
Prince Edward Island	9%		
Charlottetown	9%		
Newfoundland	12%		
St. John's	9%		
Yukon	6%		
Dawson City	7%		
Whitehorse	5%		
Northwest Territories	7%		
Yellowknife	5%		
Inuvik	2%		
Nunavut	4%		
Iqaluit	7%		

Note: NET Active Planning = respondents who are gathering information, planning a visit, making arrangements, or already booked.

Base: Out-of-province pleasure travellers (past 3 years), excluding residents from each province

24 MP1\_OP. Which of the following best describes your current situation when thinking about each of the following destinations for a vacation trip? (Select one for each)



# Net Promoter Score (NPS) – by City/Region

	W1	W2	W3
British Columbia	<b>+50</b>		
Kootenay Rockies	<b>+46</b>		
Thompson Okanagan	<b>+45</b>		
Victoria	<b>+41</b>		
Whistler	<b>+32</b>		
Vancouver	<b>+27</b>		
Alberta	<b>+14</b>		
Banff & Lake Louise	<b>+52</b>		
Alberta Rockies	<b>+44</b>		
Jasper	<b>+40</b>		
Calgary	<b>+4</b>		
Edmonton	<b>-14</b>		
Saskatchewan	<b>-53</b>		
Saskatoon	<b>-47</b>		
Regina	<b>-60</b>		

	W1	W2	W3
Manitoba	<b>-49</b>		
Churchill	<b>-20</b>		
Winnipeg	<b>-47</b>		
Ontario	<b>+9</b>		
Niagara Falls	<b>+37</b>		
Toronto	<b>+31</b>		
Muskoka	<b>+17</b>		
Ottawa	<b>+11</b>		
Northern Ontario	<b>-21</b>		
Quebec	<b>+9</b>		
Montréal	<b>+28</b>		
Québec City	<b>+25</b>		
Mont Tremblant	<b>+5</b>		
New Brunswick	<b>+13</b>		
Saint John	<b>-2</b>		
Fredericton	<b>-6</b>		

	W1	W2	W3
Nova Scotia	<b>+29</b>		
Cape Breton	<b>+46</b>		
Halifax	<b>+25</b>		
Prince Edward Island	<b>+35</b>		
Charlottetown	<b>+25</b>		
Newfoundland	<b>+39</b>		
St. John's	<b>+24</b>		
Yukon	<b>+19</b>		
Dawson City	<b>+3</b>		
Whitehorse	<b>0</b>		
Northwest Territories	<b>+3</b>		
Yellowknife	<b>+1</b>		
Inuvik	<b>-17</b>		
Nunavut	<b>-12</b>		
Iqaluit	<b>-28</b>		

Note: Net Promoter Score (NPS): This measure has an 11pt scale (0-10). The score is calculated by subtracting Detractors (0-6 rating) from Promoters (9-10 rating). Asked of past visitors only.

Base: Out-of-province pleasure travellers (past 3 years), excluding residents from each province who have visited destination (Wave 1= 50-866)

MP11\_CA\_NEW1\_OP. Whether you have visited or not, how likely are you to recommend each of the following vacation destinations to a friend, family member or colleague?

# 3. Results

## COVID Questions

Wave 1 - June 2020

# Impact of COVID-19 – Top2Box (Strongly/Somewhat Agree)

TOTAL				BC (n=1500)	AB (n=1500)	SK (n=500)	MB (n=500)	ON (n=2100)	QC (n=1500)	NB (n=400)	NS (n=400)	PE (n=250)	NL (n=400)
	W1 (n=9050)	W2	W3	W1 (n=1500)	W1 (n=1500)	W1 (n=500)	W1 (n=500)	W1 (n=2100)	W1 (n=1500)	W1 (n=400)	W1 (n=400)	W1 (n=250)	W1 (n=400)
COVID-19 will have an ongoing impact on the global economy	87%			90%	90%	90%	86%	88%	83%	84%	89%	91%	83%
COVID-19 will lead to an economic recession or depression in my country	77%			79%	83%	81%	75%	76%	74%	74%	78%	72%	68%
COVID-19 will have a financial impact on me and my family	53%			59%	62%	60%	53%	56%	38%	51%	53%	54%	48%
I'm spending less and saving more as a result of COVID-19	52%			52%	52%	53%	50%	54%	50%	46%	51%	47%	46%
My family has suffered job loss as a result of COVID-19	35%			39%	42%	33%	36%	35%	32%	30%	30%	28%	27%
I'm worried about losing my job as a result of COVID-19	23%			25%	29%	22%	23%	25%	16%	22%	18%	17%	21%
I'm having a hard time keeping up with bills as a result of COVID-19	23%			26%	30%	24%	27%	24%	15%	24%	23%	21%	23%

# Likelihood to Travel – Top2Box (Definitely/Very Likely)






TOTAL		BC W1 (n=1500) W2 W3	AB W1 (n=1500) W2 W3	SK W1 (n=500) W2 W3	MB W1 (n=500) W2 W3	ON W1 (n=2100) W2 W3	QC W1 (n=1500) W2 W3	NB W1 (n=400) W2 W3	NS W1 (n=400) W2 W3	PE W1 (n=250) W2 W3	NL W1 (n=400) W2 W3
Other communities near you	41%	43%	42%	37%	42%	37%	44%	43%	49%	61%	50%
Other parts of your province	35%	34%	38%	33%	35%	29%	41%	38%	45%	64%	42%
Others parts of Canada	22%	18%	26%	26%	25%	21%	24%	15%	21%	32%	20%
The United States	13%	12%	12%	12%	12%	12%	16%	7%	6%	6%	13%
Other countries (outside of the United States)	15%	13%	14%	10%	11%	13%	21%	8%	10%	11%	10%



# Likelihood to Travel Next Year – Top2Box (Definitely/Very Likely)

TOTAL		BC W1 (n=1500) W2 W3	AB W1 (n=1500) W2 W3	SK W1 (n=500) W2 W3	MB W1 (n=500) W2 W3	ON W1 (n=2100) W2 W3	QC W1 (n=1500) W2 W3	NB W1 (n=400) W2 W3	NS W1 (n=400) W2 W3	PE W1 (n=250) W2 W3	NL W1 (n=400) W2 W3
Visiting friends and relatives	48%	46%	49%	48%	48%	47%	49%	43%	46%	55%	47%
Leisure/pleasure	43%	44%	44%	37%	43%	40%	48%	32%	39%	45%	43%
Business Meetings	10%	8%	10%	11%	11%	10%	11%	9%	8%	10%	10%
Conferences/Conventions	9%	8%	9%	10%	11%	9%	10%	8%	11%	6%	12%

# Duration of Next Trip – Top2Box (Definitely/Very Likely)

TOTAL		BC W1 (n=1500) W2 W3	AB W1 (n=1500) W2 W3	SK W1 (n=500) W2 W3	MB W1 (n=500) W2 W3	ON W1 (n=2100) W2 W3	QC W1 (n=1500) W2 W3	NB W1 (n=400) W2 W3	NS W1 (n=400) W2 W3	PE W1 (n=250) W2 W3	NL W1 (n=400) W2 W3
A trip of 1 night	 36%	35%	36%	34%	34%	34%	39%	31%	31%	44%	34%
A trip of 2 nights	 35%	36%	36%	33%	32%	33%	38%	30%	32%	41%	35%
A trip of 3-4 nights	 30%	34%	35%	29%	27%	28%	31%	22%	25%	24%	33%
A trip of 5-6 nights	 24%	26%	28%	22%	23%	22%	26%	14%	19%	14%	23%
A trip of 7+ nights	 23%	25%	27%	21%	24%	21%	24%	12%	20%	19%	28%



# First Month Consider Travelling to Destinations

	Before Sep 2020	Sep – Dec 2020	Sometime in 2021	Not until vaccine	Don't know
<b>Total</b>					
Other communities near you	48%	17%	13%	11%	11%
Other parts of your province	43%	21%	12%	12%	12%
Other parts of Canada	21%	22%	20%	20%	16%
The United States	6%	12%	17%	44%	21%
Other countries (outside of the United States)	5%	11%	18%	44%	22%
<b>British Columbia</b>					
Other communities near you	49%	16%	13%	11%	11%
Other parts of your province	41%	21%	12%	12%	14%
Other parts of Canada	17%	22%	21%	22%	19%
The United States	5%	10%	16%	49%	21%
Other countries (outside of the United States)	4%	9%	20%	46%	21%
<b>Alberta</b>					
Other communities near you	55%	16%	10%	9%	10%
Other parts of your province	54%	19%	9%	8%	10%
Other parts of Canada	29%	24%	18%	15%	14%
The United States	7%	13%	18%	40%	22%
Other countries (outside of the United States)	5%	11%	21%	39%	24%

	Before Sep 2020	Sep – Dec 2020	Sometime in 2021	Not until vaccine	Don't know
<b>Saskatchewan</b>					
Other communities near you	53%	13%	14%	10%	10%
Other parts of your province	55%	15%	9%	8%	12%
Other parts of Canada	29%	21%	21%	14%	15%
The United States	7%	10%	17%	40%	26%
Other countries (outside of the United States)	5%	7%	14%	45%	29%
<b>Manitoba</b>					
Other communities near you	51%	14%	13%	9%	14%
Other parts of your province	54%	14%	9%	9%	15%
Other parts of Canada	23%	25%	21%	15%	16%
The United States	6%	13%	17%	41%	26%
Other countries (outside of the United States)	3%	7%	17%	44%	29%
<b>Ontario</b>					
Other communities near you	43%	21%	13%	12%	11%
Other parts of your province	35%	26%	14%	13%	12%
Other parts of Canada	19%	25%	21%	20%	15%
The United States	5%	12%	17%	46%	19%
Other countries (outside of the United States)	4%	12%	19%	45%	21%

(cont.)

Base: Total respondents

# First Month Consider Travelling to Destinations (cont.)

	Before Sep 2020	Sep – Dec 2020	Sometime in 2021	Not until vaccine	Don't know
<b>Total</b>					
Other communities near you	48%	17%	13%	11%	11%
Other parts of your province	43%	21%	12%	12%	12%
Other parts of Canada	21%	22%	20%	20%	16%
The United States	6%	12%	17%	44%	21%
Other countries (outside of the United States)	5%	11%	18%	44%	22%
<b>Quebec</b>					
Other communities near you	48%	14%	13%	11%	13%
Other parts of your province	46%	17%	12%	11%	14%
Other parts of Canada	25%	18%	17%	21%	19%
The United States	8%	12%	17%	40%	23%
Other countries (outside of the United States)	7%	11%	18%	41%	22%
<b>New Brunswick</b>					
Other communities near you	48%	12%	12%	16%	12%
Other parts of your province	44%	22%	9%	14%	12%
Other parts of Canada	14%	20%	21%	29%	15%
The United States	3%	9%	12%	54%	22%
Other countries (outside of the United States)	2%	4%	11%	58%	24%

	Before Sep 2020	Sep – Dec 2020	Sometime in 2021	Not until vaccine	Don't know
<b>Nova Scotia</b>					
Other communities near you	57%	14%	11%	9%	10%
Other parts of your province	52%	20%	8%	9%	11%
Other parts of Canada	21%	20%	20%	25%	15%
The United States	5%	6%	13%	58%	19%
Other countries (outside of the United States)	3%	8%	15%	53%	20%
<b>Prince Edward Island</b>					
Other communities near you	74%	8%	7%	5%	6%
Other parts of your province	82%	6%	3%	3%	5%
Other parts of Canada	26%	29%	29%	15%	10%
The United States	1%	4%	17%	58%	20%
Other countries (outside of the United States)	1%	9%	16%	52%	23%
<b>Newfoundland</b>					
Other communities near you	57%	14%	12%	11%	5%
Other parts of your province	60%	16%	7%	11%	6%
Other parts of Canada	15%	24%	24%	21%	15%
The United States	5%	9%	14%	52%	19%
Other countries (outside of the United States)	5%	8%	10%	56%	20%

Base: Total respondents



# Furthest Distance Willing to Travel

TOTAL		BC	AB	SK	MB	ON	QC	NB	NS	PE	NL
W1 (n=5305) W2 W3		W1 (n=850) W2 W3	W1 (n=953) W2 W3	W1 (n=329) W2 W3	W1 (n=307) W2 W3	W1 (n=1004) W2 W3	W1 (n=868) W2 W3	W1 (n=248) W2 W3	W1 (n=253) W2 W3	W1 (n=209) W2 W3	W1 (n=284) W2 W3
Less than a 30-minutes drive away	4%	3%	4%	3%	2%	5%	3%	5%	1%	3%	4%
Between 30 minutes and less than 2-hour drive away	28%	23%	22%	19%	26%	36%	28%	23%	22%	32%	16%
Between 2 and 4-hour drive away	34%	31%	39%	41%	43%	32%	32%	49%	40%	47%	22%
More than 4-hours drive away	30%	40%	33%	34%	26%	25%	32%	19%	31%	16%	52%
Don't know	4%	3%	3%	3%	2%	3%	5%	4%	6%	2%	6%

Base: Respondents willing to travel to other communities near you or other parts of your province before September 2020.

COV6. You mentioned that you might feel comfortable travelling to other communities near you or other parts of your province by August 2020. What is the furthest away that you would consider travelling?

# Travelling Outside of Province before September 2020

	TOTAL			BC			AB			SK			MB			ON		
	W1 (n=2004)	W2	W3	W1 (n=246)	W2	W3	W1 (n=439)	W2	W3	W1 (n=147)	W2	W3	W1 (n=110)	W2	W3	W1 (n=403)	W2	W3
British Columbia	37%			n/a	n/a	n/a	80%			58%			44%			40%		
Alberta	25%			67%			n/a	n/a	n/a	84%			52%			28%		
Saskatchewan	14%			18%			34%			n/a	n/a	n/a	41%			12%		
Manitoba	11%			12%			17%			37%			n/a	n/a	n/a	12%		
Ontario	26%			27%			24%			19%			40%			n/a	n/a	n/a
Quebec	19%			11%			8%			8%			10%			44%		
Nova Scotia	23%			15%			11%			8%			14%			37%		
New Brunswick	21%			9%			6%			6%			5%			26%		
Prince Edward Island	19%			7%			8%			7%			9%			29%		
Newfoundland	12%			7%			8%			6%			6%			23%		
Yukon	7%			10%			9%			9%			6%			9%		
Northwest Territories	6%			7%			8%			5%			4%			9%		
Nunavut	5%			3%			5%			4%			4%			7%		
Don't know	11%			13%			3%			1%			4%			14%		

(cont.)

Base: Respondents willing to travel to other parts of Canada before September 2020.

34 COV7. You mentioned that you might feel comfortable travelling to other parts of Canada by August 2020. Which provinces or territories would you consider visiting? (Select all that apply)




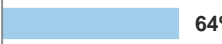
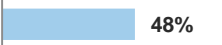



# Travelling Outside of Province before September 2020 (cont.)

	TOTAL			QC			NB			NS			PE			NL		
	W1 (n=2004)	W2	W3	W1 (n=376)	W2	W3	W1 (n=70*)	W2	W3	W1 (n=88*)	W2	W3	W1 (n=62*)	W2	W3	W1 (n=63*)	W2	W3
British Columbia	37%			22%			18%			19%			11%			24%		
Alberta	25%			9%			13%			10%			9%			30%		
Saskatchewan	14%			3%			4%			4%			-			7%		
Manitoba	11%			4%			8%			5%			4%			13%		
Ontario	26%			58%			36%			34%			26%			36%		
Quebec	19%			n/a	n/a	n/a	17%			22%			4%			16%		
Nova Scotia	23%			16%			64%			n/a	n/a	n/a	87%			43%		
New Brunswick	21%			28%			n/a	n/a	n/a	51%			79%			23%		
Prince Edward Island	19%			17%			58%			51%			n/a	n/a	n/a	12%		
Newfoundland	12%			4%			22%			28%			14%			n/a	n/a	n/a
Yukon	7%			3%			4%			5%			2%			7%		
Northwest Territories	6%			2%			6%			3%			2%			14%		
Nunavut	5%			2%			4%			9%			1%			3%		
Don't know	11%			14%			11%			8%			1%			11%		

Base: Respondents willing to travel to other parts of Canada before September 2020. \*Small base size (<100), interpret with caution.

COV7. You mentioned that you might feel comfortable travelling to other parts of Canada by August 2020. Which provinces or territories would you consider visiting? (Select all that apply)





# Conditions Impacting Safety of Travel

	<b>TOTAL</b> 	<b>BC</b>	<b>AB</b>	<b>SK</b>	<b>MB</b>	<b>ON</b>	<b>QC</b>	<b>NB</b>	<b>NS</b>	<b>PE</b>	<b>NL</b>
		W1 (n=1500) W2 W3	W1 (n=1500) W2 W3	W1 (n=500) W2 W3	W1 (n=500) W2 W3	W1 (n=2100) W2 W3	W1 (n=1500) W2 W3	W1 (n=400) W2 W3	W1 (n=400) W2 W3	W1 (n=250) W2 W3	W1 (n=400) W2 W3
A vaccine for COVID-19 is available	 64%	68%	61%	61%	65%	68%	58%	66%	71%	65%	68%
A treatment for COVID-19 is available	 48%	49%	46%	44%	47%	52%	41%	46%	50%	44%	52%
The number of active COVID-19 cases is declining in the area I'm interested in visiting	 41%	45%	48%	46%	43%	42%	36%	39%	38%	46%	42%
Government restrictions related to are relaxed in the area I'm interested in visiting	 34%	38%	36%	35%	34%	33%	31%	28%	35%	41%	35%
The number of active COVID-19 cases is declining in the area where I live	 31%	33%	34%	29%	30%	34%	25%	25%	31%	26%	31%

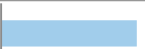





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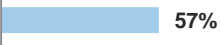



# Conditions Impacting Safety of Travel (cont.)

TOTAL		BC W1 (n=1500) W2 W3	AB W1 (n=1500) W2 W3	SK W1 (n=500) W2 W3	MB W1 (n=500) W2 W3	ON W1 (n=2100) W2 W3	QC W1 (n=1500) W2 W3	NB W1 (n=400) W2 W3	NS W1 (n=400) W2 W3	PE W1 (n=250) W2 W3	NL W1 (n=400) W2 W3
Government restrictions related to COVID-19 are relaxed in the area where I live	 26%	28%	25%	27%	22%	26%	25%	24%	25%	28%	26%
International travel restrictions are relaxed	 22%	23%	25%	23%	21%	23%	20%	14%	18%	19%	20%
I feel safe travelling now	 7%	6%	10%	11%	9%	5%	9%	7%	6%	11%	4%
None of the above	 6%	5%	4%	7%	6%	6%	8%	6%	6%	2%	6%

# Conditions Impacting Interest in Travel – Top2Box (Much More/More Interested)

TOTAL		BC		AB		SK		MB		ON		QC		NB		NS		PE		NL									
		W1 (n=9050)	W2	W3	W1 (n=1500)	W2	W3	W1 (n=1500)	W2	W3	W1 (n=500)	W2	W3	W1 (n=2100)	W2	W3	W1 (n=1500)	W2	W3	W1 (n=400)	W2	W3	W1 (n=400)	W2	W3	W1 (n=250)	W2	W3	W1 (n=400)
Businesses, attractions and tours employing strict cleaning protocols	 49%	48%	51%	47%	44%	47%	52%	42%	46%	49%	49%																		
Businesses, attractions and tours employing physical distancing practices	 44%	44%	44%	41%	43%	44%	47%	36%	46%	44%	47%																		
Businesses, attractions and tours providing masks for staff	 39%	37%	38%	35%	33%	40%	42%	32%	42%	30%	34%																		
Tours and activities that are restricted to one travel group / family	 39%	38%	40%	39%	35%	40%	39%	31%	42%	43%	40%																		
Businesses, attractions and tours providing masks for customers	 36%	35%	34%	32%	33%	37%	38%	29%	35%	25%	36%																		
Large crowds	 8%	7%	7%	9%	5%	7%	9%	6%	6%	7%	11%																		

# Most Important Operational Practices in Restaurants

	<b>TOTAL</b> W1 (n=3016) W2 W3	<b>BC</b>	<b>AB</b>	<b>SK</b>	<b>MB</b>	<b>ON</b>	<b>QC</b>	<b>NB</b>	<b>NS</b>	<b>PE</b>	<b>NL</b>
		W1 (n=512) W2 W3	W1 (n=466) W2 W3	W1 (n=173) W2 W3	W1 (n=165) W2 W3	W1 (n=722) W2 W3	W1 (n=506) W2 W3	W1 (n=134) W2 W3	W1 (n=117) W2 W3	W1 (n=86*) W2 W3	W1 (n=135) W2 W3
Provide hand sanitizer	 67%	69%	69%	64%	67%	68%	63%	56%	69%	74%	77%
Enforce social distancing guidelines	 65%	69%	66%	73%	63%	69%	56%	66%	67%	73%	61%
Required employee health screening	 57%	62%	58%	56%	56%	64%	41%	49%	61%	60%	51%
Cleaning/sanitizing procedures well-explained	 56%	60%	58%	59%	53%	57%	54%	46%	51%	52%	58%
Require employees to wear masks	 55%	56%	59%	58%	42%	58%	52%	46%	60%	39%	52%
Cleaning activity during your visit	 55%	56%	55%	61%	54%	56%	51%	40%	52%	56%	61%

(cont.)








# Most Important Operational Practices in Restaurants (cont.)

TOTAL		BC	AB	SK	MB	ON	QC	NB	NS	PE	NL
		W1 (n=512) W2 W3	W1 (n=466) W2 W3	W1 (n=173) W2 W3	W1 (n=165) W2 W3	W1 (n=722) W2 W3	W1 (n=506) W2 W3	W1 (n=134) W2 W3	W1 (n=117) W2 W3	W1 (n=86*) W2 W3	W1 (n=135) W2 W3
Provide disinfectant wipes	53%	55%	57%	64%	49%	54%	45%	40%	60%	46%	60%
Sneeze guards or other barriers	45%	55%	44%	50%	39%	48%	35%	38%	53%	52%	44%
Require employees to wear gloves	40%	41%	41%	30%	30%	46%	31%	35%	46%	30%	38%
Encourage customers to wear masks	33%	28%	32%	23%	24%	40%	27%	21%	33%	20%	33%
None of these	8%	5%	7%	7%	11%	7%	10%	13%	9%	9%	5%



# Most Important Operational Practices on Airlines

	<b>TOTAL</b> W1 (n=3017) W2 W3	BC	AB	SK	MB	ON	QC	NB	NS	PE	NL
		W1 (n=516) W2 W3	W1 (n=488) W2 W3	W1 (n=162) W2 W3	W1 (n=171) W2 W3	W1 (n=687) W2 W3	W1 (n=503) W2 W3	W1 (n=124) W2 W3	W1 (n=146) W2 W3	W1 (n=80*) W2 W3	W1 (n=140) W2 W3
Passengers provided with hand sanitizers, face masks, disinfectant wipes, etc.	 70%	72%	72%	72%	70%	72%	64%	60%	68%	60%	77%
High-tech cleaning of plane's interior between flights	 69%	73%	70%	65%	68%	70%	64%	68%	66%	69%	76%
Passenger health screening (temperature checks, screening for COVID-19 symptoms)	 68%	72%	74%	69%	66%	68%	62%	70%	73%	67%	76%
Health screening required for flight crew	 62%	67%	67%	65%	56%	64%	54%	65%	63%	65%	68%
Social distancing enforced in the boarding area	 60%	65%	58%	55%	59%	63%	51%	64%	72%	67%	67%

(cont.)

Base: Respondents seeing question (split sample for COVID10, COVID11, and COVID12). \* Small base size (<100), interpret with caution.

COVID11. When travelling on a commercial airline in the future, what are the most important operational practices you think should be used? (Select all that apply.)

# Most Important Operational Practices on Airlines (cont.)

TOTAL		BC W1 (n=516) W2 W3	AB W1 (n=488) W2 W3	SK W1 (n=162) W2 W3	MB W1 (n=171) W2 W3	ON W1 (n=687) W2 W3	QC W1 (n=503) W2 W3	NB W1 (n=124) W2 W3	NS W1 (n=146) W2 W3	PE W1 (n=80*) W2 W3	NL W1 (n=140) W2 W3
Empty middle seat policy	<p>59%</p>	63%	62%	62%	62%	63%	47%	51%	64%	65%	65%
Plane bathroom cleaned after each use	<p>57%</p>	59%	59%	50%	51%	58%	55%	63%	54%	67%	61%
Flight crew required to wear masks and gloves	<p>56%</p>	58%	55%	46%	42%	59%	55%	48%	55%	52%	52%
Sneeze guards barriers between seats	<p>42%</p>	48%	39%	35%	44%	49%	31%	37%	56%	46%	48%
None of these	<p>10%</p>	10%	7%	9%	11%	8%	14%	18%	9%	9%	7%

Base: Respondents seeing question (split sample for COVID10, COVID11, and COVID12). \* Small base size (<100), interpret with caution.

COVID11. When travelling on a commercial airline in the future, what are the most important operational practices you think should be used? (Select all that apply.)

# Most Important Operational Practices in Hotels

TOTAL				BC	AB	SK	MB	ON	QC	NB	NS	PE	NL
	W1 (n=3017)	W2	W3	W1 (n=472)	W1 (n=546)	W1 (n=165)	W1 (n=164)	W1 (n=691)	W1 (n=491)	W1 (n=142)	W1 (n=137)	W1 (n=84*)	W1 (n=125)
Guests provided with hand sanitizer, face masks, disinfectant wipes, etc.	67%			63%	65%	58%	59%	69%	68%	66%	67%	83%	65%
Cleaning/sanitizing procedures well-explained	65%			65%	64%	65%	63%	65%	64%	69%	69%	82%	67%
Cleaning activity visible in public areas during your hotel stay	60%			64%	64%	67%	64%	61%	52%	64%	74%	73%	64%
Required employee health screening	57%			64%	58%	54%	57%	60%	49%	53%	70%	65%	56%
Social distancing guidelines enforced	55%			63%	52%	53%	52%	62%	41%	54%	65%	49%	58%
Sneeze guard barriers at front desk, gift shop, etc.	52%			58%	53%	46%	40%	54%	46%	55%	55%	58%	39%

(cont.)

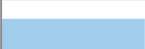




Base: Respondents seeing question (split sample for COVID10, COVID11, and COVID12). \* Small base size (<100), interpret with caution.  
 COVID12. When staying in a hotel in the future, what are the most important operational practices you think should be used? (Select all that apply.)



# Most Important Operational Practices in Hotels (cont.)

TOTAL		BC W1 (n=472) W2 W3	AB W1 (n=546) W2 W3	SK W1 (n=165) W2 W3	MB W1 (n=164) W2 W3	ON W1 (n=691) W2 W3	QC W1 (n=491) W2 W3	NB W1 (n=142) W2 W3	NS W1 (n=137) W2 W3	PE W1 (n=84*) W2 W3	NL W1 (n=125) W2 W3
Require buffets replaced by room service or grab-and-go options	 44%	43%	43%	42%	40%	48%	41%	50%	39%	46%	43%
Floor markings for social distancing	 42%	41%	37%	32%	38%	45%	42%	53%	42%	37%	40%
Contact-less check-in (app based, no human contact)	 38%	39%	41%	28%	32%	40%	33%	45%	40%	46%	43%
Smartphone-based mobile room keys	 29%	34%	33%	27%	22%	29%	25%	28%	31%	32%	23%
None of these	 9%	7%	9%	11%	16%	9%	10%	11%	6%	2%	7%

# Attitudes Towards Travel – Top2Box (Strong/Somewhat Agree)

	<b>TOTAL</b> W1 (n=9050) W2 W3	<b>BC</b>	<b>AB</b>	<b>SK</b>	<b>MB</b>	<b>ON</b>	<b>QC</b>	<b>NB</b>	<b>NS</b>	<b>PE</b>	<b>NL</b>
		W1 (n=1500) W2 W3	W1 (n=1500) W2 W3	W1 (n=500) W2 W3	W1 (n=500) W2 W3	W1 (n=2100) W2 W3	W1 (n=1500) W2 W3	W1 (n=400) W2 W3	W1 (n=400) W2 W3	W1 (n=250) W2 W3	W1 (n=400) W2 W3
I will visit destinations that I know well or have visited before	 52%	55%	60%	55%	53%	52%	43%	45%	55%	74%	59%
I will visit and participate in outdoor attractions and activities	 52%	53%	56%	55%	56%	50%	49%	45%	54%	57%	54%
I miss travel. I can't wait to get out and travel again	 51%	53%	55%	48%	51%	50%	51%	38%	49%	54%	56%
I will only do one or two things per day to limit social interaction	 46%	47%	46%	46%	45%	46%	45%	42%	45%	50%	46%
I will spend less than I did on vacations pre-COVID-19	 38%	37%	40%	40%	37%	38%	37%	35%	36%	40%	36%

(cont.)



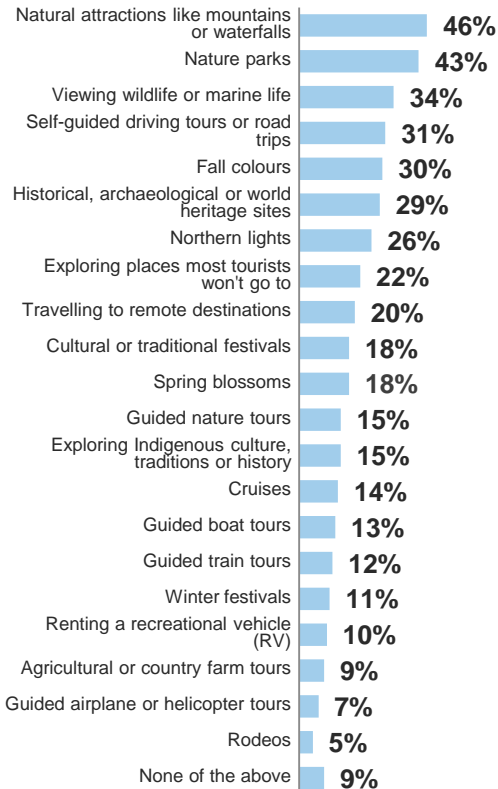
# Attitudes Towards Travel – Top2Box (Strong/Somewhat Agree) (cont.)

TOTAL	W1 (n=9050)			BC	AB	SK	MB	ON	QC	NB	NS	PE	NL
	W1	W2	W3	W1 (n=1500)	W1 (n=1500)	W1 (n=500)	W1 (n=500)	W1 (n=2100)	W1 (n=1500)	W1 (n=400)	W1 (n=400)	W1 (n=250)	W1 (n=400)
I will visit new destinations that I have never visited before	37%			38%	39%	34%	35%	39%	34%	31%	33%	38%	42%
I will visit and participate in indoor attractions and activities	31%			30%	38%	35%	37%	31%	26%	22%	31%	31%	33%
I will fill my days with as many attractions/activities as possible	23%			22%	25%	21%	24%	25%	19%	16%	23%	19%	26%
I will spend more than I did on vacations pre-COVID-19	14%			14%	12%	11%	13%	15%	12%	8%	13%	11%	15%

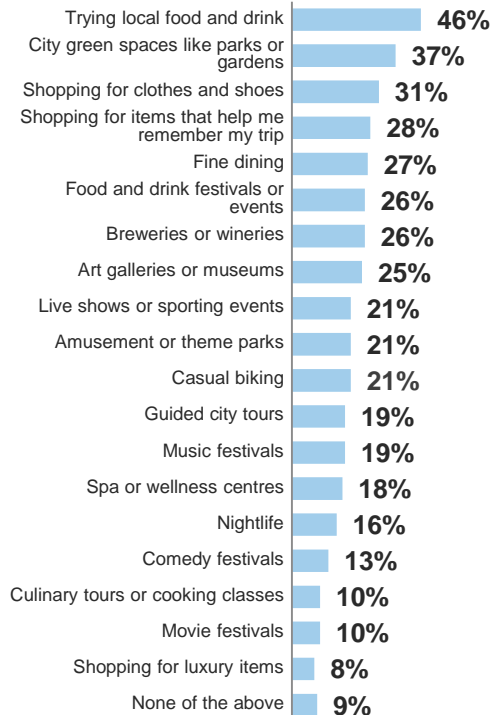


# General Activities Interested In

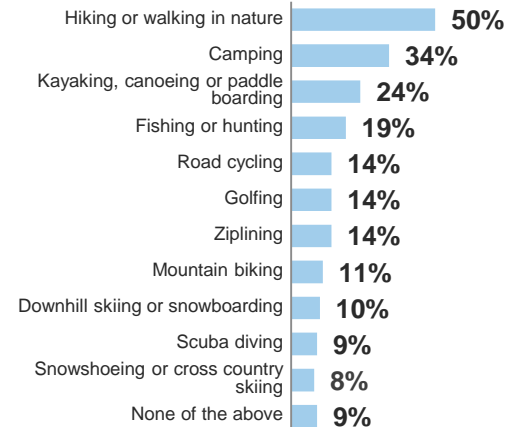
## THINGS TO SEE & DO



## CITY ACTIVITIES



## OUTDOOR ACTIVITIES



Note: Please refer to detailed data tables for results by province.

Base: Total respondents (n=9050)

# Accommodation Use – Top2Box (Definitely/Very Likely)

	<b>TOTAL</b> W1 (n=9050) W2 W3	<b>BC</b>	<b>AB</b>	<b>SK</b>	<b>MB</b>	<b>ON</b>	<b>QC</b>	<b>NB</b>	<b>NS</b>	<b>PE</b>	<b>NL</b>
		W1 (n=1500) W2 W3	W1 (n=1500) W2 W3	W1 (n=500) W2 W3	W1 (n=500) W2 W3	W1 (n=2100) W2 W3	W1 (n=1500) W2 W3	W1 (n=400) W2 W3	W1 (n=400) W2 W3	W1 (n=250) W2 W3	W1 (n=400) W2 W3
Home of friends or relatives	46%	51%	50%	54%	49%	45%	42%	44%	44%	58%	50%
Mid-priced hotel / motel	28%	28%	32%	32%	28%	25%	31%	25%	27%	35%	30%
Luxury hotel	23%	23%	23%	24%	18%	24%	23%	17%	22%	18%	21%
Camping or trailer /RV park	23%	24%	33%	26%	22%	18%	25%	21%	24%	20%	22%
Own cottage or second home	23%	18%	21%	24%	22%	25%	22%	23%	25%	18%	28%
Resort	22%	24%	26%	21%	24%	25%	14%	18%	19%	18%	22%

(cont.)










# Accommodation Use – Top2Box (Definitely/Very Likely) (cont.)

	TOTAL W1 (n=9050) W2 W3	BC W1 (n=1500) W2 W3	AB W1 (n=1500) W2 W3	SK W1 (n=500) W2 W3	MB W1 (n=500) W2 W3	ON W1 (n=2100) W2 W3	QC W1 (n=1500) W2 W3	NB W1 (n=400) W2 W3	NS W1 (n=400) W2 W3	PE W1 (n=250) W2 W3	NL W1 (n=400) W2 W3
Budget hotel / motel	19%	18%	18%	20%	25%	16%	26%	21%	20%	23%	19%
Rented house, apartment or condominium	19%	21%	21%	18%	20%	19%	18%	15%	19%	19%	24%
Bed & Breakfast	13%	14%	16%	12%	12%	13%	11%	8%	12%	12%	16%
Guest ranch, farm, or lodge	11%	12%	12%	11%	10%	11%	9%	11%	11%	10%	13%
Hostel, university or school dormitory	8%	8%	7%	4%	7%	9%	8%	6%	5%	4%	10%

# Transportation Modes – Top2Box (Definitely/Very Likely)

	<b>TOTAL</b> 	<b>BC</b>	<b>AB</b>	<b>SK</b>	<b>MB</b>	<b>ON</b>	<b>QC</b>	<b>NB</b>	<b>NS</b>	<b>PE</b>	<b>NL</b>
		W1 (n=1500) W2 W3	W1 (n=1500) W2 W3	W1 (n=500) W2 W3	W1 (n=500) W2 W3	W1 (n=2100) W2 W3	W1 (n=1500) W2 W3	W1 (n=400) W2 W3	W1 (n=400) W2 W3	W1 (n=250) W2 W3	W1 (n=400) W2 W3
Domestic air travel	 21%	26%	28%	20%	27%	21%	14%	17%	23%	22%	33%
International air travel	 21%	22%	25%	18%	19%	21%	21%	12%	14%	16%	20%
Rental car	 19%	19%	24%	19%	21%	20%	16%	16%	16%	17%	26%
Ferry	 18%	32%	17%	16%	12%	13%	18%	15%	18%	27%	26%
Public transit	 16%	19%	18%	9%	17%	17%	16%	8%	13%	8%	13%

(cont.)

# Transportation Modes – Top2Box (Definitely/Very Likely) (cont.)

TOTAL		BC W1 (n=1500) W2 W3	AB W1 (n=1500) W2 W3	SK W1 (n=500) W2 W3	MB W1 (n=500) W2 W3	ON W1 (n=2100) W2 W3	QC W1 (n=1500) W2 W3	NB W1 (n=400) W2 W3	NS W1 (n=400) W2 W3	PE W1 (n=250) W2 W3	NL W1 (n=400) W2 W3
Taxis	14%	17%	17%	13%	17%	13%	14%	10%	16%	15%	15%
Bus travel	12%	12%	13%	6%	11%	13%	13%	7%	9%	11%	13%
Ride sharing services	12%	12%	12%	9%	13%	13%	10%	6%	9%	5%	10%
Cruise	9%	10%	8%	7%	10%	9%	9%	6%	6%	8%	11%

# Offerings to Encourage Travel in Near Future

TOTAL		W1 (n=9050)		BC	AB	SK	MB	ON	QC	NB	NS	PE	NL
		W1 (n=1500)	W2	W1 (n=1500)	W1 (n=500)	W1 (n=500)	W1 (n=2100)	W1 (n=1500)	W1 (n=400)	W1 (n=400)	W1 (n=250)	W1 (n=400)	
		W2	W3	W2	W2	W2	W2	W2	W2	W2	W2	W2	W2
		W3	W3	W3	W3	W3	W3	W3	W3	W3	W3	W3	W3
Full ticket refund	25%	31%	27%	26%	22%	26%	21%	18%	26%	18%	30%		
Discounted travel deal	19%	19%	22%	19%	19%	18%	20%	14%	18%	20%	21%		
Free cancellations	15%	16%	15%	14%	16%	15%	15%	16%	15%	12%	12%		
Travel insurance offer	5%	5%	4%	5%	6%	4%	6%	3%	3%	4%	6%		
Waived Booking Fees	3%	2%	2%	2%	2%	3%	3%	1%	1%	3%	2%		
None of the above would encourage me to make a travel booking in the near future	32%	26%	28%	34%	34%	32%	34%	47%	36%	40%	29%		
Other	1%	1%	1%	1%	1%	2%	1%	0	1%	3%	0		

52 Base: Total respondents  
 COV17. Which one of the following offerings would most encourage you to make a travel booking in the near future? (Select one.)



# 4. Population

## Market Sizing

Wave 1 - June 2020

# Market Sizing – Travel Before September 2020

	Residents									
	BC (n=1500)	AB (n=1500)	SK (n=500)	MB (n=500)	ON (n=2100)	QC (n=1500)	NB (n=400)	NS (n=400)	PE (n=250)	NL (n=400)
Adult population aged 18+	3,804,000	3,143,500	841,500	984,000	10,763,500	6,579,000	612,170	759,470	115,075	428,905
NET Domestic	55%	63%	63%	60%	47%	56%	55%	62%	85%	69%
	2,092,000	1,980,500	530,000	590,500	5,059,000	3,684,000	336,500	471,000	98,000	296,000
NET In-Province	54%	62%	62%	60%	46%	55%	54%	61%	85%	68%
	2,054,000	1,949,000	521,500	590,500	4,951,000	3,618,500	330,500	463,500	98,000	291,500
Other communities near you	49%	55%	53%	51%	43%	48%	48%	57%	74%	57%
	1,864,000	1,729,000	446,000	502,000	4,628,500	3,158,000	294,000	433,000	85,000	244,500
Other parts of your province	41%	54%	55%	54%	35%	46%	44%	52%	82%	60%
	1,559,500	1,697,500	463,000	531,500	3,767,000	3,026,500	269,500	395,000	94,500	257,500
Other parts of Canada	17%	29%	29%	23%	19%	25%	14%	21%	26%	15%
	646,500	911,500	244,000	226,500	2,045,000	1,645,000	85,500	159,500	30,000	64,500
The United States	5%	7%	7%	6%	5%	8%	3%	5%	1%	5%
	190,000	220,000	59,000	59,000	538,000	526,500	18,500	38,000	1,000	21,500
Other countries (outside of the US)	4%	5%	5%	3%	4%	7%	2%	3%	1%	5%
	152,000	157,000	42,000	29,500	430,500	460,500	12,000	23,000	1,000	21,500

Base: Total respondents

COV5. Given the current situation with COVID-19, when is the first month that you would feel comfortable travelling to the following destinations?

# Market Sizing – In-Province Travel Distance

For travel before September 2020

	Residents									
	BC (n=850)	AB (n=953)	SK (n=329)	MB (n=307)	ON (n=1004)	QC (n=868)	NB (n=248)	NS (n=253)	PE (n=209)	NL (n=284)
<i>In-province traveller population<sup>^</sup></i>	2,054,000	1,949,000	521,500	590,500	4,951,000	3,618,500	330,500	463,500	98,000	291,500
Less than 30 minutes	3%	4%	3%	2%	5%	3%	5%	1%	3%	4%
	61,500	78,000	15,500	12,000	247,500	108,500	16,500	4,500	3,000	11,500
Between 30 minutes and 2 hours	23%	22%	19%	26%	36%	28%	23%	22%	32%	16%
	472,500	429,000	99,000	153,500	1,782,500	1,013,000	76,000	102,000	31,500	46,500
Between 2 hours and 4 hours	31%	39%	41%	43%	32%	32%	49%	40%	47%	22%
	636,500	760,000	214,000	254,000	1,584,500	1,158,000	162,000	185,500	46,000	64,000
More than 4 hours	40%	33%	34%	26%	25%	32%	19%	31%	16%	52%
	821,500	643,000	177,500	153,500	1,238,000	1,158,000	63,000	143,500	15,500	151,500
Don't know	3%	3%	3%	2%	3%	5%	4%	6%	2%	6%
	61,500	58,500	15,500	12,000	148,500	181,000	13,000	28,000	2,000	17,500

<sup>^</sup>In-province traveller population represents the population that are willing to travel to other communities near you or other parts of your province before September 2020.

Base: Respondents willing to travel to other communities near you or other parts of your province before September 2020.

COV6. You mentioned that you might feel comfortable travelling to other communities near you or other parts of your province by August 2020. What is the furthest away that you would consider travelling?

# Market Sizing – Out-of-Province Travel Destinations

For travel before September 2020

	Residents									
	BC (n=246)	AB (n=439)	SK (n=147)	MB (n=110)	ON (n=403)	QC (n=376)	NB (n=70*)	NS (n=88*)	PE (n=62*)	NL (n=63*)
<i>Out-of-province traveller population<sup>^</sup></i>	646,500	911,500	244,000	226,500	2,045,000	1,645,000	85,500	159,500	30,000	64,500
BC	n/a	80%	58%	44%	40%	22%	18%	19%	11%	24%
	n/a	729,000	141,500	99,500	818,000	362,000	15,500	30,500	3,500	15,500
AB	67%	n/a	84%	52%	28%	9%	13%	10%	9%	30%
	433,000	n/a	204,960	118,000	572,500	148,000	11,000	16,000	2,500	19,500
SK	18%	34%	n/a	41%	12%	3%	4%	4%	-	7%
	116,500	310,000	n/a	93,000	245,500	49,500	3,500	6,500	-	4,500
MB	12%	17%	37%	n/a	12%	4%	8%	5%	4%	13%
	77,500	155,000	90,500	n/a	245,500	66,000	7,000	8,000	1,000	8,500
ON	27%	24%	19%	40%	n/a	58%	36%	34%	26%	36%
	174,500	219,000	46,500	90,500	n/a	954,000	31,000	54,000	8,000	23,000
QC	11%	8%	8%	10%	44%	n/a	17%	22%	4%	16%
	71,000	73,000	19,500	22,500	900,000	n/a	14,500	35,000	1,000	10,500
NB	9%	6%	6%	5%	26%	28%	n/a	51%	79%	23%
	58,000	54,500	14,500	11,500	531,500	460,500	n/a	81,500	23,500	15,000

<sup>^</sup>Out-of-province traveller population represents the population that are willing to travel to other parts of Canada before September 2020.

\*Small base size (<100), interpret with caution.

Base: Respondents willing to travel to other parts of Canada before September 2020.

COV7. You mentioned that you might feel comfortable travelling to other parts of Canada by August 2020. Which provinces or territories would you consider visiting? (Select all that apply)



# Market Sizing – Out-of-Province Travel Destinations

For travel before September 2020

	Residents									
	BC (n=246)	AB (n=439)	SK (n=147)	MB (n=110)	ON (n=403)	QC (n=376)	NB (n=70*)	NS (n=88*)	PE (n=62*)	NL (n=63*)
<i>Out-of-province traveller population<sup>^</sup></i>	646,500	911,500	244,000	226,500	2,045,000	1,645,000	85,500	159,500	30,000	64,500
NS	15%	11%	8%	14%	37%	16%	64%	n/a	87%	43%
	97,000	100,500	19,500	31,500	756,500	263,000	54,500	n/a	26,000	27,500
PE	7%	8%	7%	9%	29%	17%	58%	51%	n/a	12%
	45,500	73,000	17,000	20,500	593,000	279,500	49,500	81,500	n/a	7,500
NL	7%	8%	6%	6%	23%	4%	22%	28%	14%	n/a
	45,500	73,000	14,500	13,500	470,500	66,000	19,000	44,500	4,000	n/a
YU	10%	9%	9%	6%	9%	3%	4%	5%	2%	7%
	64,500	82,000	22,000	13,500	184,000	49,500	3,500	8,000	500	4,500
NT	7%	8%	5%	4%	9%	2%	6%	3%	2%	14%
	45,500	73,000	12,000	9,000	184,000	33,000	5,000	5,000	500	9,000
NU	3%	5%	4%	4%	7%	2%	4%	9%	1%	3%
	19,500	45,500	10,000	9,000	143,000	33,000	3,500	14,500	500	2,000
Don't know	13%	3%	1%	4%	14%	14%	11%	8%	1%	11%
	84,000	27,500	2,500	9,000	286,500	230,500	9,500	13,000	500	7,000

<sup>^</sup>Out-of-province traveller population represents the population that are willing to travel to other parts of Canada before September 2020.

\*Small base size (<100), interpret with caution.

Base: Respondents willing to travel to other parts of Canada before September 2020.

COV7. You mentioned that you might feel comfortable travelling to other parts of Canada by August 2020. Which provinces or territories would you consider visiting? (Select all that apply)

**Thank you!**  
**Merci!**

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