

September 04, 2020

Atlantic Canada Tourism Study Phase 2

Prepared for the
Tourism Industry Association of Prince Edward Island





INTRODUCTION

BACKGROUND

On March 11th, 2020 the World Health Organization declared COVID-19 a global pandemic. The COVID-19 pandemic is having a dramatic impact on the Atlantic Canada economies, and the challenge for the tourism sector has been amplified by closures and travel restrictions. Social distancing, capacity limitations, and traveller sentiment will continue to impact the tourism industry into the future even as travel restrictions slowly begin to ease.

The aim of this research is to provide early insights into what will almost certainly be an evolving and enduring existential shift in the consumer mindset. This Travel Study will also contribute to the foundation for a go-forward plan to advance through a recovery phase.

The study is divided into two phases. The first phase was focused on Atlantic Canadian intentions and attitudes toward intra-provincial and intra-regional travel. The second phase provides updated data on Atlantic Canadians and expands to gauge Central Canadian sentiment, specifically in southern Ontario and Quebec. Future research may expand Canada-wide.

This report highlights the results of the Phase 2 and comparisons with Phase 1 results.

METHODOLOGY

Data for this project was collected through two online surveys. The surveys were developed by MQO Research with input from Group ATN, on behalf of the Tourism Association of Prince Edward Island and with financial support from the Atlantic Canada Opportunities Agency. The surveys were programmed using Voxco software.

Participants were recruited through an online panel. Additional efforts were made to recruit participants from Prince Edward Island using e-mail invitations to a list of 400 past survey respondents who had been randomly selected by phone and had agreed to be contacted to participate in future research. An email invitation to complete the survey with a survey link was sent out to potential participants in Phase 1 and Phase 2 to increase the number of respondents from Prince Edward Island. During Phase 1 of the research, 89 individuals responded to the survey through this method; during Phase 2, 101 individuals responded. The remainder of the sample was recruited using an online panel.

The total Atlantic Canadian sample collected in Phase 1 was $n=2,088$. The total sample for Phase 2, which included both Atlantic Canadians and those from southern Ontario and Quebec, was $n=3,314$. The online survey for Phase 1 was conducted over 12 days between June 27th and July 8th. The online survey for Phase 2 was conducted over 12 days from August 10th to August 21st.

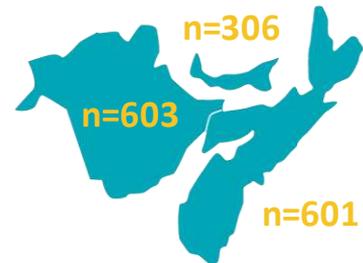
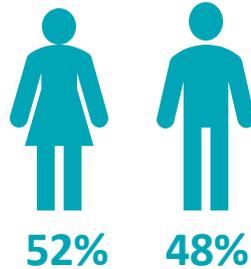
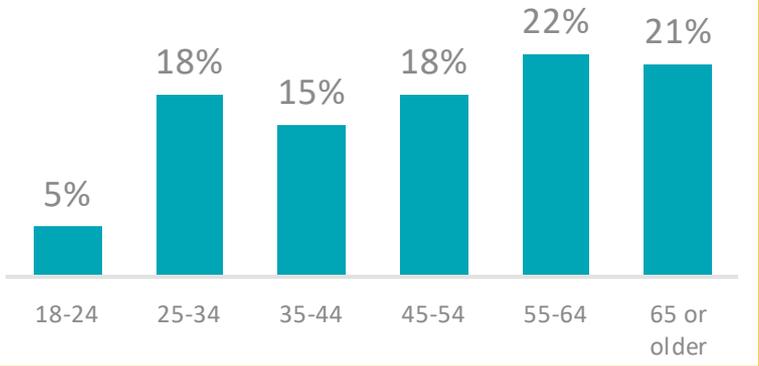
As the survey was conducted online, it is not appropriate to calculate margin of error; however, for comparison purposes, a random sample of equal size would result in a margin of error of less than 5% with 95% confidence for both phases of the research. The survey took participants an average of 15.5 minutes to complete.

Results of the survey were analyzed using SPSS and Excel.

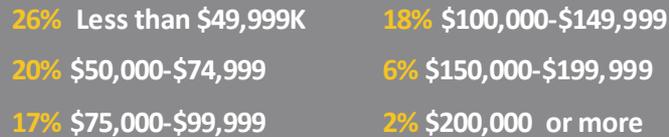
SURVEY DETAILS (Atlantic Canada)

Respondents must have taken at least one overnight trip for pleasure in the past two years. Data was collected online between August 10th to August 21st. 2,113 responses were collected in Atlantic Canada.

AGE BREAKDOWN



HOUSEHOLD INCOME.



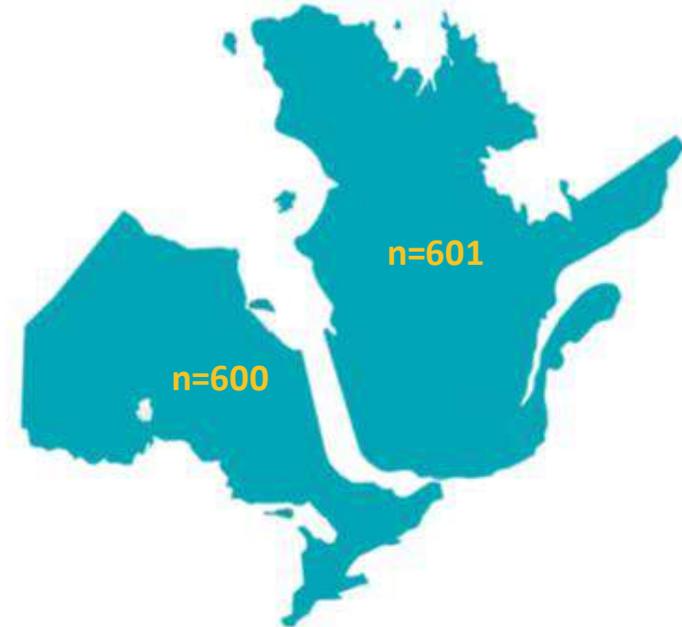
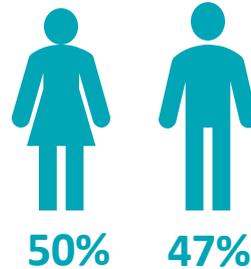
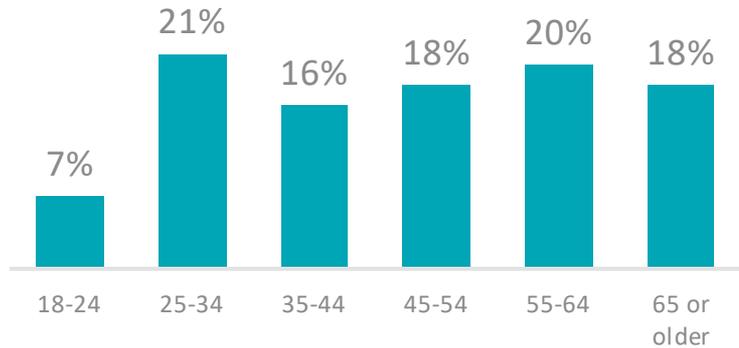
SURVEY DETAILS (Quebec and southern Ontario)

Respondents must have taken at least one overnight trip for pleasure in the past two years.

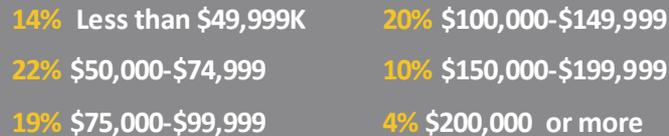
Data was collected online between August 10th to August 21st.

1,201 responses were collected in Quebec and southern Ontario (including Ottawa and economic regions south of Ottawa).

AGE BREAKDOWN



HOUSEHOLD INCOME.





Section 2:

IMPACTS OF COVID-19 ON TRAVEL



TRAVEL IMPACTS OF COVID-19¹

During Phase 1, it was identified that planned travel for the 2020 tourism season was significantly impacted by COVID-19. Sixty-five percent of Atlantic Canadians reported that the pandemic affected their overnight travel plans.

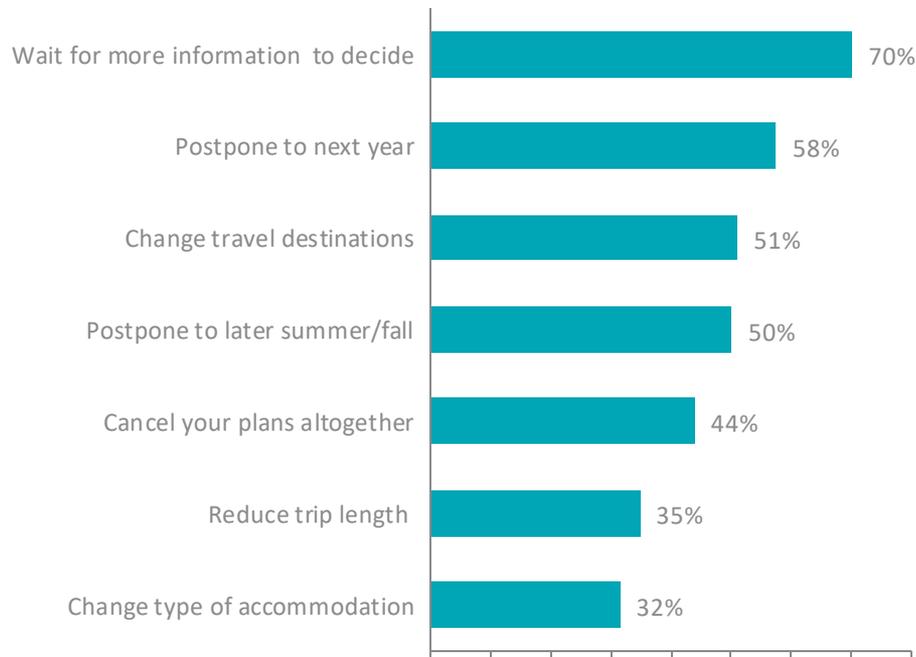
Five percent (5%) of Atlantic Canadian travellers reported that they intended to travel as planned. Frequently-changing public health recommendations and restrictions may have contributed to 19% reporting they still were not sure if their plans would be affected. Ten percent (10%) of respondents had no travel planned before the pandemic was declared in Canada.

Forty-two percent (42%) of Atlantic Canadians still have some travel planned in the coming summer/fall of 2020. The majority of Atlantic Canadians reported that “staycations” or within-province travel made up at least part of their current travel plans.

75%

Of Atlantic Canadians who had current travel plans are likely to travel within their own province.

Graph 1. What will travellers affected by COVID-19 do now?^{2,3}



¹ This data was collected in Phase 1 between June 27th and July 8th. This question was not asked during Phase 2.

² B2: Given that COVID-19 has affected, or may affect, your pleasure travel plans for the summer or fall of 2020, have you, or do you expect to...

³ Subset: Respondents with current travel plans (n = 890). Percentages may not equal 100% due to multiple mentions.

TRAVEL IMPACTS OF COVID-19⁴

Atlantic Canadians are planning on taking fewer trips following the arrival of COVID-19. The average number of trips per respondent dropped from 2.3 planned trips before the arrival of the pandemic to 1.8 planned trips by June/July.^{5,6}

There was a 61% drop in the total number of trips respondents had planned before COVID-19 compared to the total number of trips respondents reported having planned at the time of the Phase 1 survey.

Table 1 shows the percentage drop in planned trips by travel destination. When comparing respondents original travel plans with what travel was planned as of June/July, previously planned travel outside of Canada dropped off almost entirely while the lowest drop in number of trips before and after the pandemic can be seen in the Atlantic Provinces, with Newfoundland and Labrador seeing the smallest drop in trips.

Table 1. Percent drop in trips reported by respondents by destination

Travel Destination	% Drop
Overall	61%
Atlantic Canada	45%
Newfoundland and Labrador	37%
Nova Scotia	49%
New Brunswick	43%
Prince Edward Island	50%
Ontario	79%
Quebec	76%
Alberta	79%
British Columbia	79%
Manitoba	73%
Saskatchewan	70%
Somewhere in the United States	93%
Another international destination	90%

⁴ This data was collected in Phase 1 between June 27th and July 8th. These questions were not asked during Phase 2.

⁵ B3a: Before COVID-19 affected your overnight pleasure travel plans, how many trips were you planning on taking during the summer or fall of 2020?

⁶ B6a: How many pleasure trips do you have planned during the summer or fall of 2020?

An aerial photograph of a dramatic landscape featuring a deep fjord with steep, rocky cliffs on either side. A calm, blue lake is nestled within the valley, reflecting the sky. The surrounding hills are covered in lush green vegetation. The sky is filled with soft, white clouds. The image is framed by a teal border at the top and bottom, with a pattern of overlapping circles in the bottom section.

CURRENT TRAVEL PLANS BY DESTINATION

IMPACTS OF COVID-19 ON TRAVEL

TRAVEL INTENTIONS: ATLANTIC CANADA

Forty-six percent (46%) of Atlantic Canadians have plans to take a pleasure trip from August to December 2020; visiting friends and family was the most common reason cited for current travel plans.

Atlantic Canadians who have travel plans from August to December 2020 have an average of 1.7 trips planned, with over half of travellers planning to visit friends and family (63%) and over half indicating they have a trip planned for relaxation (54%). This is consistent with data gathered in June and July during Phase 1, where most travellers (69%) had at least one trip planned to visit family and approximately half (51%) had a trip planned for the purpose of relaxation.

Table 2. Reasons for Current Travel Plans^{7,8}

	Phase 1	Phase 2
Visit family or friends	69%	63%
Relaxation	51%	54%
Change of scenery	28%	26%
New experiences or fun activities	21%	22%

Twenty-two percent (22%) of travellers are still planning to travel with the purpose of seeking out new experiences or fun activities and 26% have made travel plans for a change of scenery.

Travellers age 18 to 34 were more likely to cite new experiences and fun activities as the purpose for a planned trip, while older travellers were more likely to be visiting relatives or seeking a change of scenery. Travellers age 18 to 54 were more likely to have a trip planned for relaxation than travellers ages 55+.

Table 3. Reasons for Current Travel Plans by Age^{7,8}

	18 - 34	35 - 54	55+
Visit family or friends	53%	56%	75%
Relaxation	63%	58%	45%
Change of scenery	19%	22%	33%
New experiences or fun activities	32%	22%	16%

Trips to seek out new or fun activities account for 12% of the total trips Atlantic Canadians have planned for the remainder of 2020. Trips planned for a change of scenery account for 15% of Atlantic Canadians' remaining 2020 travel plans.

⁷ Subset: Respondents with current travel plans (n = 959). Percentages may not equal 100% due to multiple mentions. "Don't know" and "prefer not to say" excluded.

⁸ B4f: What is the main reason for this pleasure trip?

TRAVEL INTENTIONS: SOUTHERN ONTARIO AND QUEBEC

Forty-four percent (44%) of travellers from southern Ontario and Quebec have plans to take a pleasure trip during the remainder of 2020, with visiting friends and family being the most common reason cited for remaining 2020 travel plans.⁹

Like Atlantic Canadians, southern Ontario and Quebec residents who have travel plans for the remainder of 2020 have an average of 1.7 trips planned. The most commonly cited reasons for travel were visiting friends and family (59%) and relaxation (49%), with a change of scenery (39%) cited more frequently among southern Ontario and Quebec residents than Atlantic Canadians.

Table 4. Reasons for Current Travel Plans^{10,11}

	Atlantic Canada	Ont./Que.
Visit family or friends	63%	59%
Relaxation	54%	49%
Change of scenery	26%	39%
New experiences or fun activities	22%	21%

The majority of younger travellers (72%) and older travellers (81%) in southern Ontario and Quebec have trips currently planned to visit family or friends. Travellers age 35 to 54 in this region cited relaxation (70%) as a key reason for travel. This age group was the least likely to plan a trip for the purposes of visiting friends and family (32%).

Table 5. Reasons for Current Travel Plans by Age^{10,11}

	18 - 34	35 - 54	55+
Visit family or friends	72%	32%	81%
Relaxation	44%	70%	26%
Change of scenery	51%	45%	19%
New experiences or fun activities	26%	24%	11%

Older travellers in southern Ontario and Quebec age 55+ were less likely to travel for a change in scenery or new experiences or fun activities than travellers aged 18 to 54 in the same region.

⁹ B2: Do you currently have plans to take a pleasure trip during the remainder of 2020?

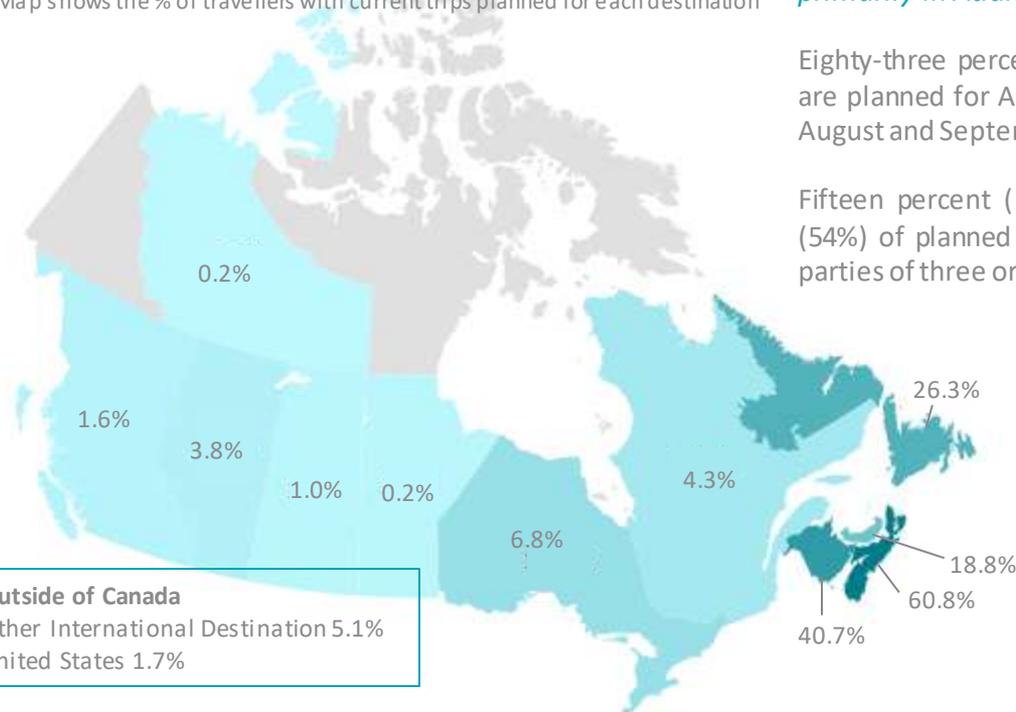
¹⁰ B4f: What is the main reason for this pleasure trip?

¹¹ Subset: Respondents with current travel plans (n = 403). Percentages may not equal 100% due to multiple mentions. "Don't know" and "prefer not to say" excluded. Mentions less than 10% were not included in the table.

TRAVEL INTENTIONS: ATLANTIC CANADIANS

Current Travel Plan Destinations^{12,13,14}

Map shows the % of travellers with current trips planned for each destination



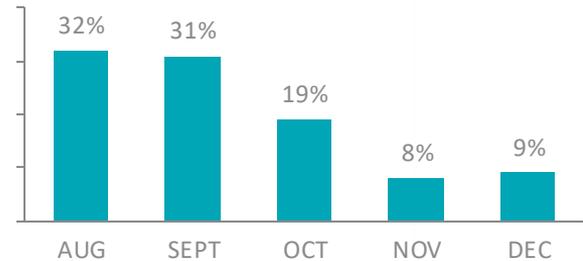
Outside of Canada
 Other International Destination 5.1%
 United States 1.7%

Atlantic Canadians' current travel plans remain concentrated primarily in Atlantic Canada.

Eighty-three percent (83%) of the total planned trips remaining for 2020 are planned for Atlantic Canada.¹³ The majority of trips are scheduled for August and September for an average of 3.9 days.^{14,15}

Fifteen percent (15%) of travellers will travel alone. Fifty-four percent (54%) of planned trips have travel parties of two and 30% will be travel parties of three or more people.

Graph 2. Current travel plans by month^{14,15}



¹² B4a: How many pleasure trips do you have planned for the remainder of 2020?

¹³ B4b: What destination are you planning to visit during the remainder of 2020?

¹⁴ Subset: Respondents with current travel plans (n = 964). Percentages may not equal 100% due to multiple mentions.

¹⁵ B4c: During which months are you planning to travel to each destination?

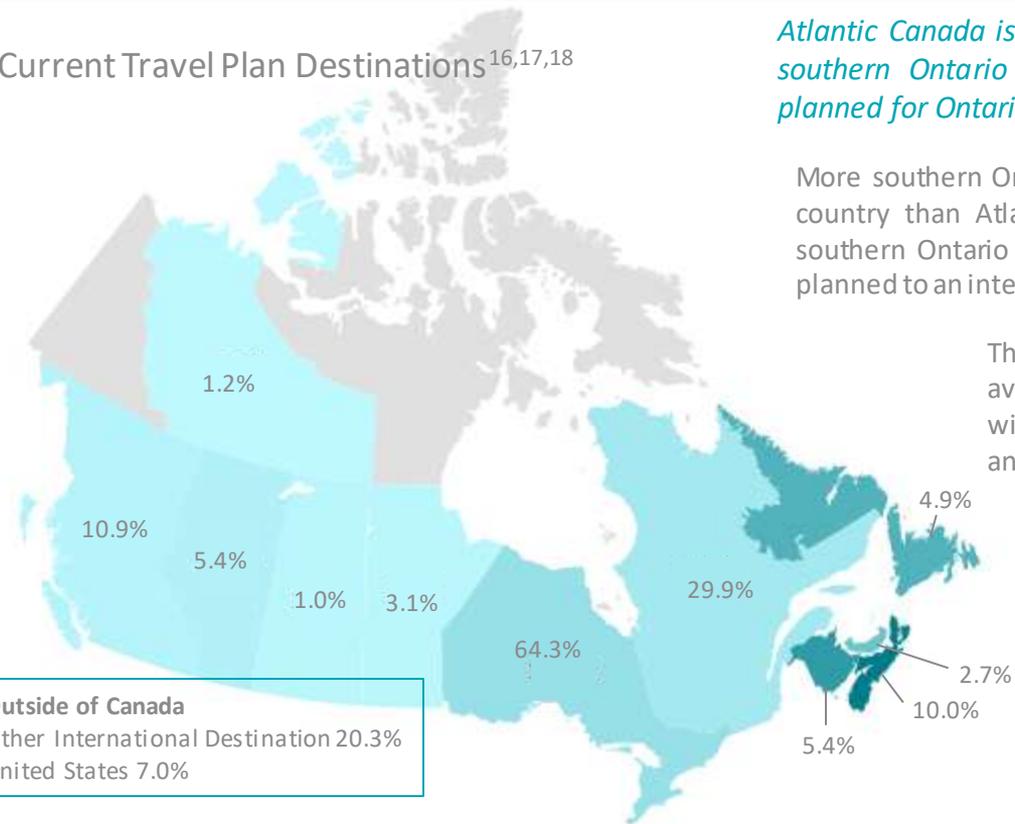
TRAVEL INTENTIONS: SOUTHERN ONTARIO AND QUEBEC RESIDENTS

Current Travel Plan Destinations^{16,17,18}

Atlantic Canada is the destination for 14% of the total trips planned by southern Ontario and Quebec residents. More than half (57%) are planned for Ontario and Quebec.

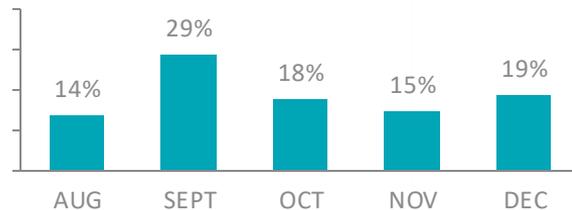
More southern Ontario and Quebec travellers intend to travel outside the country than Atlantic Canadians. Seven percent (7%) of travellers from southern Ontario and Quebec intend to visit the US and 20% have a trip planned to an international destination outside of the US.^{17,18}

The majority of trips are scheduled for September for an average of 5.2 days. Seventeen percent (17%) of travellers will travel alone. Travel parties of two make up 49% of trips and 34% have travel parties of three or more people.



Outside of Canada
 Other International Destination 20.3%
 United States 7.0%

Graph 3. Current travel plans by month^{18,19}



¹⁶ B4a: How many pleasure trips do you have planned for the remainder of 2020?

¹⁷ B4b: What destination are you planning to visit during the remainder of 2020?

¹⁸ Subset: Respondents with current travel plans (n = 404). Percentages may not equal 100% due to multiple mentions.

¹⁹ B4c: During which months are you planning to travel to each destination?

TRAVEL INTENTIONS: NEW BRUNSWICK

Forty-one percent (41%) of Atlantic Canadians plan to travel within New Brunswick during the remainder of 2020. Of the total trips that New Brunswickers currently have planned, 42% are staycations.²⁰

New Brunswick is the destination for 24% of the total trips Atlantic Canadians have planned for the remainder of 2020. Fourteen percent (14%) of the planned trips to New Brunswick are Atlantic Canadian travellers from outside of New Brunswick.²⁴

New Brunswick is the destination for 3% of the total trips southern Ontario and Quebec residents have planned for the remainder of 2020. The most popular tourism regions travellers from Atlantic Canada, southern Ontario, and Quebec plan to explore while visiting New Brunswick are the Acadian and Fundy coasts. However, the Fundy Coast is more likely to be visited by Atlantic Canadians; southern Ontario and Quebec residents are more likely to visit the Acadian Coast.

Between Ontarians and residents of Quebec, there were significant differences in expected visits to New Brunswick tourism regions. The higher portions of residents of southern Ontario selecting each region suggests that travellers from Ontario may be more familiar with New Brunswick's regions. There were also difference by Atlantic Canadian provinces (for example, those from Nova Scotia were most likely to cite the Fundy Coastal region, while those from New Brunswick cited the Acadian Coastal region more frequently).

Graph 4. Expected Visits to New Brunswick Tourism Regions^{21,22,23}

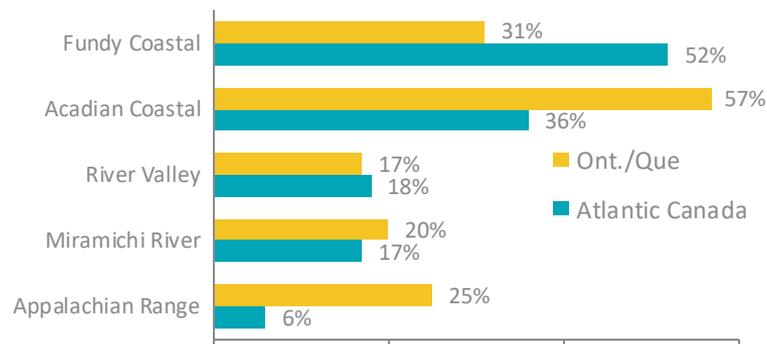


Table 6. Expected Visits to NB Tourism Regions by Province^{20,21,22,23}

Region	On. %	Que. %	NL %	NS %	NB %	PEI %
Fundy Coastal	50%	14%	59%	66%	46%	40%
Acadian Coastal	74%	40%	23%	24%	44%	19%
River Valley	26%	8%	13%	13%	22%	8%
Miramichi River	26%	15%	15%	7%	21%	21%
Appalachian Range	48%	2%	9%	3%	7%	2%

²⁰ B4b: What destination are you planning to visit during the remainder of 2020?

²¹ Percentages may exceed 100% due to multiple responses.

²² B9a: Which of the following tourism regions do you expect to visit in New Brunswick?

²³ SUBSET: AC Respondents (n=297) who currently have plans to visit NB during 2020.

ON/QC Respondents (n=20) who currently have plans to visit NB during 2020.

²⁴ Calculated by removing New Brunswick residents from the sample of Atlantic Canadians.

TRAVEL INTENTIONS: NEW BRUNSWICK

Table 7 shows some of the most common attractions travellers intend to visit during their planned trip to New Brunswick.²⁵

Table 7. Top Attractions Travellers Intend on Visiting in NB^{25, 26, 27, 28}

Attraction	Atlantic %	Ont./Que. %
Beaches	14%	44%
Fundy National Park, Fundy Trail	11%	7%
Shopping	10%	-
Hopewell Rocks	8%	6%
Moncton	6%	-
Magic Mountain	6%	-
Hiking Trails	5%	-
Parks	5%	-
Restaurants, food etc.	-	33%
Bay of Fundy	-	24%
Museum	-	15%
Whale Watching	-	6%

The data suggests that southern Ontario and Quebec residents have stronger intent to be outdoors during their visit to New Brunswick compared to their Atlantic Canada Counterparts.

There is a notable difference in New Brunswick attractions of interest when comparing Atlantic Canadians and Central Canadians. Although beaches are the top-rated attractions for both groups, the interest among Central Canadians is three times greater, with 44% of southern Ontario and Quebec residents intending to hit the beach, compared to 14% of Atlantic Canadians.

Restaurants, Bay of Fundy, and museums also generated much higher interest among southern Ontario and Quebec residents.

²⁵ B9b: What are some of the attractions you are intending on visiting in New Brunswick?

²⁶ Percentages may exceed 100% due to multiple responses.

²⁷ SUBSET: AC Respondents (n=151) who currently have plans to visit NB during 2020.

²⁸ SUBSET: ON/QC Respondents (n=7) who currently have plans to visit NB during 2020. Removing “don’t know” and “prefer not to say” responses among those from ON/QC, the sample size for this group is n = 7. As such, these results should be interpreted with caution.

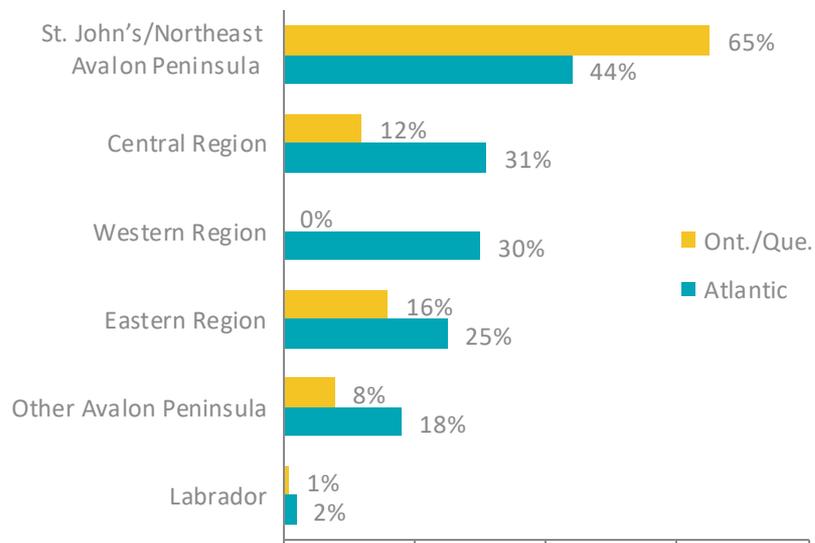
TRAVEL INTENTIONS: NEWFOUNDLAND AND LABRADOR

Twenty-six percent (26%) of Atlantic Canadians plan to travel within Newfoundland and Labrador in 2020. Of the total trips that Newfoundlanders currently have planned, 65% are staycations.²⁹

Newfoundland and Labrador is the destination for 15% of the trips Atlantic Canadians have planned for the remainder of 2020. Four percent (4%) of the planned trips to Newfoundland and Labrador are Atlantic Canadian travellers from outside of the province.

Newfoundland and Labrador is the destination for 3% of the total trips southern Ontario and Quebec residents have planned for the remainder of 2020. The most popular tourism region travellers from Atlantic Canada, southern Ontario, and Quebec plan to explore while visiting Newfoundland and Labrador is the St. John's/Avalon Peninsula region. While Atlantic Canadians also expect to visit the St. John's/Avalon Peninsula region, Atlantic Canadian trips are spread out through other regions in the province. This is likely driven by within-province travel.

Graph 5. Expected Visits to NL Tourism Regions^{30,31,32,33,34}



²⁹ B4b: What destination are you planning to visit during the remainder of 2020?

³⁰ B10a: Which of the following tourism regions do you expect to visit in NL?

³¹ Percentages may exceed 100% due to multiple responses.

³² SUBSET: AC Respondents (n=220) who currently have plans to visit NL during 2020.

³³ SUBSET: ON/QC Respondents (n=20) who currently have plans to visit NL during 2020.

³⁴ Two percent (2%) responded "don't know" or "prefer not to say."

TRAVEL INTENTIONS: NEWFOUNDLAND AND LABRADOR

Table 8 shows some of the most common attractions travellers intend to visit during their planned trip to Newfoundland and Labrador.³⁵

Table 8. Top Attractions Travellers Intend on Visiting in NL.^{35,36,37,38,39}

Attraction	Atlantic %	Ont./Que. %
East Coast Trail, hiking, etc.	17%	-
Signal Hill	13%	63%
Gros Morne	11%	-
Shopping	10%	-
Beaches	10%	-
Museum/The Rooms	8%	-
Parks	6%	-
Trinity/Bona Vista	5%	1%
St John's	5%	3%
Cape Spear	3%	3%

Southern Ontario and Quebec residents do not intend to visit a wide variety of attractions during their travels to Newfoundland and Labrador.

There was a higher degree of diversity of interest in Newfoundland and Labrador attractions among Atlantic residents compared to Southern Ontario and Quebec residents.⁴⁰

Signal Hill registered by far the greatest interest for Southern Ontario and Quebec residents, with 63% of travellers intending to visit the site. The next most commonly cited attractions that Southern Ontario and Quebec residents intended to visit was St John's and Cape Spear, which were both at 3%.

East Coast Trail, hiking, etc. (17%) was the attraction of most interest to Atlantic residents with Signal Hill, Gros Morne, Shopping and Beaches all exceeding a 10% intention.

³⁵ B10b: What are some of the attractions you are intending on visiting in NL?

³⁶ Percentages may exceed 100% due to multiple responses.

³⁷ SUBSET: AC Respondents (n=220) who currently have plans to visit NL during 2020.

³⁸ Removing "don't know" and "prefer not to say" responses, the sample size for this group is n = 6. As such, these results should be interpreted with caution.

³⁹ Two percent (2%) responded "don't know" or "prefer not to say."

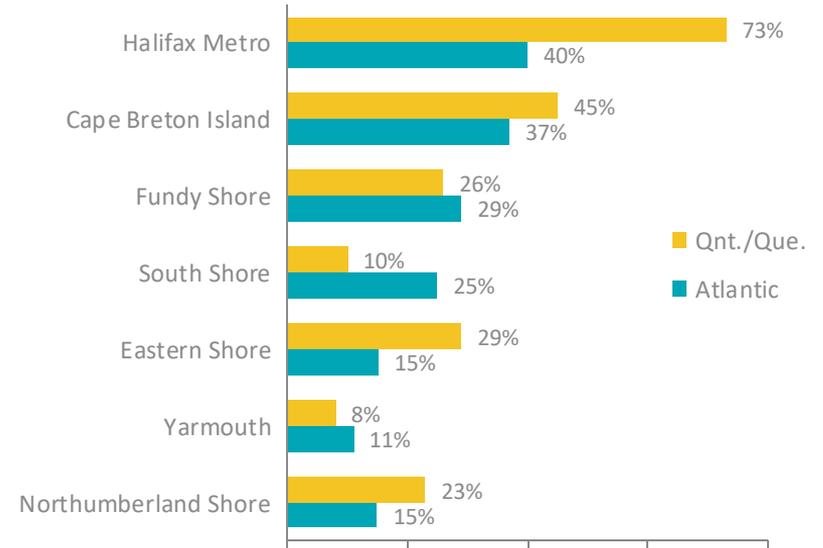
TRAVEL INTENTIONS: NOVA SCOTIA

Sixty-one (61%) of Atlantic Canadians plan to travel within Nova Scotia in 2020. Of the total trips that Nova Scotians currently have planned, 52% are staycations.⁴⁰

Nova Scotia is the destination for 36% of the total trips Atlantic Canadians have planned for the remainder of 2020. Twenty-four percent (24%) of the planned trips to Nova Scotia are Atlantic Canadian travellers from outside of Nova Scotia.

Nova Scotia is the destination for 6% of the total trips southern Ontario and Quebec residents have planned for the remainder of 2020. The most popular tourism regions travellers from southern Ontario and Quebec plan to explore while visiting Nova Scotia are Halifax Metro and Cape Breton. Southern Ontario and Quebec residents are less likely than Atlantic Canadian Travellers to have a trip planned to explore the Eastern Shore and Northumberland Shore.

Graph 6. Expected Visits to Nova Scotia Tourism Regions^{41,42,43,44,45}



⁴⁰ B4b: What destination are you planning to visit during the remainder of 2020?

⁴¹ Percentages may exceed 100% due to multiple responses.

⁴² B8a: Which of the following tourism regions do you expect to visit in Nova Scotia?

⁴³ SUBSET: AC Respondents (n=436) who currently have plans to visit NS during 2020.

⁴⁴ SUBSET: ON/QC Respondents (n=32) who currently have plans to visit NS during 2020.

⁴⁵ Two percent (2%) responded “don’t know” or “prefer not to say.”

TRAVEL INTENTIONS: NOVA SCOTIA

Table 9 shows some of the most common attractions travellers intend to visit during their planned trip to Nova Scotia.

Table 9. Top Attractions Travellers Intend on Visiting in NS ^{46,47,48,49,50}

Attraction	Atlantic %	Ont./Que. %
Cabot Trail	16%	4%
Beaches	16%	3%
Shopping	9%	-
Golf	8%	-
Restaurants, food, lobster, etc.	9%	2%
Halifax	-	2%
Citadel Hill	-	2%
Cape Breton	-	10%
Peggy's Cove	-	4%
Museums	-	2%
Waterfront	-	4%
Wineries, breweries	-	52%
Site Seeing	-	10%

⁴⁶ B8b: What are some of the attractions you are intending on visiting in NS?

⁴⁷ Percentages may exceed 100% due to multiple responses.

⁴⁸ SUBSET: AC Respondents (n=207) who currently have plans to visit NS during 2020.

⁴⁹ Two percent (2%) responded “don’t know” or “prefer not to say.”

Atlantic Canadians are looking to explore beaches and the Cabot Trail while wineries and breweries are more popular attractions for southern Ontario and Quebec travellers.⁵⁰



⁵⁰ SUBSET: ON/QC Respondents who currently have plans to visit NS during 2020. The sample size for this group is n = 11. As such, these results should be interpreted with caution.

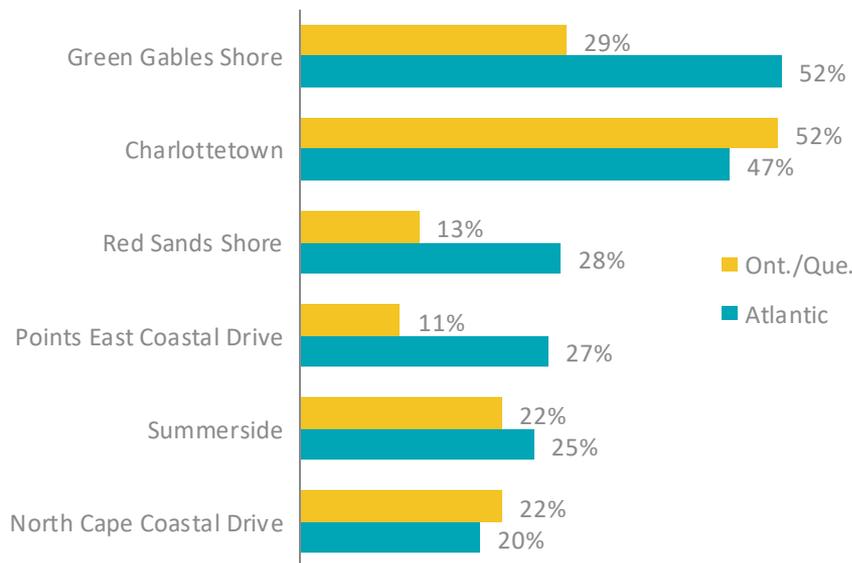
TRAVEL INTENTIONS: PRINCE EDWARD ISLAND

Nineteen percent (19%) of Atlantic Canadians plan to travel within Prince Edward Island in the remainder of 2020. Of the total trips that Islanders currently have planned, 15% are staycations.⁵¹

Prince Edward Island is the destination for 11% of the total trips Atlantic Canadians have planned for the remainder of 2020. Ten percent (10%) of the planned trips to Prince Edward Island are Atlantic Canadian travellers from outside of the province.

Prince Edward Island is the destination for 2% of the total trips southern Ontario and Quebec residents have planned for the remainder of 2020. The most popular tourism regions travellers from southern Ontario and Quebec plan to explore while visiting Prince Edward Island are Charlottetown and the Green Gables Shore. Southern Ontario and Quebec residents are less likely than Atlantic Canadian Travellers to have a trip planned to explore the Red Sands Shore and the Points East Coastal Drive.

Graph 7. Expected Visits to PEI Tourism Regions^{52,53,54,55}



⁵¹ B4b: What destination are you planning to visit during the remainder of 2020?

⁵² B7a: Which of the following tourism regions do you expect to visit in PEI?

⁵³ Percentages may exceed 100% due to multiple responses.

⁵⁴ SUBSET: AC Respondents (n=88) who currently have plans to visit PEI during 2020.

⁵⁵ SUBSET: ON/QC Respondents (n=5) who currently have plans to visit PEI during 2020.

⁵⁶ Two percent (2%) responded “don’t know” or “prefer not to say.”

TRAVEL INTENTIONS: PRINCE EDWARD ISLAND

Table 10 shows some of the most common attractions travellers intend to visit during their planned trip to Prince Edward Island.⁵⁶

Table 10. Top Attractions Travellers Intend on Visiting in PEI^{56,57,58,59,60}

Attraction	Atlantic %	Ont./Que. %
Beaches	35%	15%
Restaurants, food, lobster, etc.	10%	-
Golf	14%	-
Sandspit Amusement Park	2%	-
Parks	10%	54%
Anne of Green Gables	11%	-
Shining Waters Park	2%	-
Cavendish	8%	-
Brackley Beach	1%	-
Charlottetown	4%	47%
Sight-seeing (Non-specific)	1%	15%

Similar to Newfoundland and Labrador, Atlantic Canadian visitors to Prince Edward Island indicated intention to visit a larger variety of attractions than the southern Ontario and Quebec residents.

This response pattern could be due to Atlantic Canadians being more familiar with attractions in the region.



⁵⁶ B7b: What are some of the attractions you are intending on visiting in PEI?

⁵⁷ Percentages may exceed 100% due to multiple responses.

⁵⁸ SUBSET: ON/QC Respondents (n=18) who currently have plans to visit PEI during 2020.

⁵⁹ SUBSET: AC Respondents (n=88) who currently have plans to visit PEI during 2020.

⁶⁰ Two percent (2%) responded “don’t know” or “prefer not to say.”

WITHIN-PROVINCE TRAVEL BEHAVIOUR

Slight increases in the number of Atlantic Canadians indicating they are likely to take part in tourism activities in their province suggest that people may be getting more comfortable with living with COVID-19 in Atlantic Canada.

For those traveling within their home province during the remainder of 2020, finding new experiences at home was still a top priority: respondents were most likely to want to explore a new part of the province (71%), check out a new restaurant (67%), or visit attractions they had never visited before (67%).

With the exception of festivals and organized tours, slightly more respondents indicated likelihood to take part in tourism at home such as visiting attractions and new restaurants than earlier in the summer.

Fewer Atlantic Canadians indicated they would be likely to spend less money than normal when travelling within their own province.

⁶¹ C2: If travelling for pleasure within your own province during the summer or fall of 2020, how likely would you be to...

Graph 8. Within-Province Travel Behaviour^{61,62}

If traveling within your own province in 2020, how likely would you be to...



⁶² Percentages may exceed 100% due to multiple responses. “Don’t know” and “prefer not to say” responses excluded.

WITHIN-PROVINCE TRAVEL BEHAVIOUR

Southern Ontario and Quebec residents are likely to spend less and are less likely to seek out new experiences as part of in-province travel compared to Atlantic Canadians.

Only about half of southern Ontario and Quebec residents are likely to seek out new attractions, restaurants, and experiences when traveling within their home provinces during the remainder of 2020.

More Atlantic Canadians are likely to explore their own province, check out new restaurants, visit new attractions and stay in paid accommodations than southern Ontario and Quebec residents travelling in their own province.

Forty-six percent (46%) of southern Ontario and Quebec residents indicated they are likely to spend less than normal on a staycation at this time.

⁶³ C3: If travel taking an overnight pleasure trip during the remainder of 2020, how comfortable would you be with...

⁶⁴ Percentages may exceed 100% due to multiple responses. "Don't know" and "prefer not to say" responses excluded.

Graph 9. Within-Province Travel Behaviour^{63,64}

If traveling within your own province in 2020, how likely would you be to...



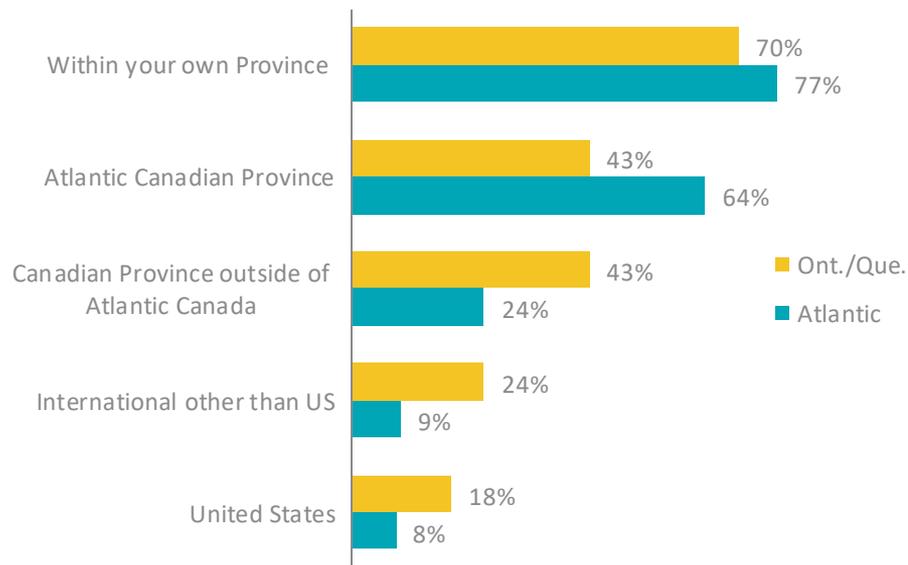
TRAVEL INTENTIONS: SPRING/SUMMER 2021

Seventy-seven percent (77%) of Atlantic Canadian travellers and 70% in Southern Ontario and Quebec travellers indicated that they are likely to travel within their own province in 2021, even if no vaccine is available.⁶⁵

When asked about travel to Atlantic Canadian provinces outside of their province of residence, Atlantic Canadian travellers (64%) indicated that they were more than Southern Ontario and Quebec residents (43%), to travel in Atlantic Canada if no vaccine is available in the 2021 Spring and Summer tourism season.

While Atlantic Canadians feel that they will still be comfortable travelling within the Atlantic Canadian bubble in 2021, Atlantic Canadians are much less likely than Southern Ontario and Quebec residents to travel internationally, to the US or even outside of Atlantic provinces.

Graph 10. Likely to travel in Spring/Summer 2021 if no vaccine is available.^{65,66}



⁶⁵ C11: If no vaccine is available in the spring/summer of 2021 how likely are you to travel...

⁶⁶ Question specified 'other than your home province' for Atlantic Canadians being asked about travel to Atlantic Canadian provinces and when Southern Ontario and Quebec residents were asked about travel to Canadian provinces outside of Atlantic Canada.

TRAVEL INTENTIONS: SPRING/SUMMER 2021

Younger travellers (18-34) are more likely than older travellers (55+) to indicate that they would travel in the Spring/Summer of 2021, even if no vaccine is available, particularly among Atlantic Canadian travellers.⁶⁷

New Brunswick (73%) and Prince Edward Island (79%), travellers are the most likely to travel to Atlantic Canadian provinces other than their province of residence, if a vaccine is still not available in 2020.

Although less likely to travel to Atlantic Canada, or within their own province without a vaccine, older travellers (55+) in Southern Ontario and Quebec are as likely as those 54 and under to travel to International destinations or to Canadian provinces outside of Atlantic Canada.

Travellers from Southern Ontario (74%) are more likely to travel within their own province in the Spring/Summer of 2021 than those from Quebec (63%), even when no vaccine is available.

Table 11. Likely to travel in Spring/Summer 2021 if no vaccine is available.^{67,68}

	Atlantic Canada			Ontario/Quebec		
	18 - 34	35 - 54	55+	18 - 34	35 - 54	55+
Within your own Province	80%	79%	74%	74%	74%	63%
Atlantic Canadian Province	67%	65%	61%	53%	40%	37%
Province outside Atlantic Canada	32%	22%	21%	45%	44%	41%
International other than US	15%	11%	5%	23%	27%	23%
United States	12%	8%	5%	22%	18%	14%

⁶⁷ C11: If no vaccine is available in the spring/summer of 2021 how likely are you to travel...

⁶⁸ Question specified 'other than your home province' for Atlantic Canadians being asked about travel to Atlantic Canadian provinces and when Southern Ontario and Quebec residents were asked about travel to Canadian provinces outside of Atlantic Canada.



Section 3:

TRAVELLER SENTIMENT

TRAVELLER SENTIMENT: ATLANTIC CANADIANS ON ACTIVITIES

Table 12. Traveller Comfort Level with Different Activities⁶⁹

Activity	% Comfortable	
	Phase 1	Phase 2
Walking or biking on trails	77%	82%
Visiting a national or provincial park outdoors	75%	77%
Participating in a tour with just my own travel party	69%	73%
Going to a park or beach	68%	76%
Dining at a restaurant's outdoor patio	67%	71%
Attending an outdoor event (drive in)	60%	63%
Retail shopping	54%	54%
Dining at a restaurant indoors	50%	54%
Visiting a historic/cultural attraction with indoor exhibits	44%	44%
Visiting a gallery or museum indoors	42%	43%
Watching a parade	41%	39%
Attending an indoor event (less than 50 in attendance)	30%	28%
Attending an outdoor event (50 or more)	27%	29%
Participating in tour with others not in my travel party	21%	24%
Attending an indoor event (50 or more in attendance)	19%	18%

Atlantic Canadians are increasingly comfortable with outdoor activities. However, they are generally less comfortable with indoor activities, and they want to stay within their own travel party.

Attending indoor events that include the gathering of even less than 50 is not something most Atlantic Canadians are comfortable with just yet.

Activities Atlantic Canadians are comfortable with are generally outdoor activities where social distancing might be maintained.



⁶⁹ C5: Please rate your current level of comfort with the following activities...

TRAVELLER SENTIMENT: ATLANTIC CANADIANS ON ACTIVITIES

Table 13. Likelihood of Taking Part in Different Activities ^{70,71}

Activity	Atlantic	
	Comfort	Likelihood
Walking or biking on trails	82%	75%
Going to a park or beach	77%	74%
Dining at a restaurant's outdoor patio	73%	71%
Visiting a national or provincial park outdoors	76%	69%
Retail shopping	71%	67%
Dining at a restaurant indoors	63%	61%
Participating in a tour with just my own travel party	54%	54%
Attending an outdoor event (drive in)	54%	44%
Visiting a historic/cultural attraction with indoor exhibits	44%	37%
Visiting a gallery or museum indoors	43%	35%
Watching a parade	39%	33%
Attending an indoor event (less than 50 in attendance)	28%	24%
Attending an outdoor event (50 or more)	29%	23%
Participating in tour with others not in my travel party	24%	19%
Attending an indoor event (50 or more in attendance)	18%	17%

Table 13 shows comfort levels and likelihood of Atlantic Canadians taking part in various travel activities.



⁷⁰ C5: Please rate your current level of comfort with the following activities...

⁷¹ C6: How likely would you be to take part in the following activities, on a trip in 2020, if they were available?

TRAVELLER SENTIMENT: SOUTHERN ONTARIO/QUEBEC ON ACTIVITIES

Table 14. Traveller Comfort Level with Different Activities⁷²

Activity	% Comfortable		
	Ont.	Que.	Ont. /Que.
Walking or biking on trails	75%	73%	74%
Visiting a national or provincial park outdoors	77%	71%	74%
Going to a park or beach	72%	59%	67%
Dining at a restaurant's outdoor patio	64%	60%	63%
Participating in a tour with just my own travel party	67%	54%	62%
Attending an outdoor event (drive in)	54%	56%	55%
Retail shopping	52%	44%	49%
Visiting a historic/cultural attraction with indoor exhibits	47%	41%	45%
Visiting a gallery or museum indoors	46%	41%	44%
Dining at a restaurant indoors	39%	44%	41%
Watching a parade	40%	34%	38%
Attending an indoor event (less than 50 in attendance)	31%	32%	31%
Participating in tour with others not in my travel party	36%	22%	31%
Attending an outdoor event (50 or more)	30%	29%	30%
Attending an indoor event (50 or more in attendance)	27%	22%	25%

Generally, Quebec residents are less comfortable taking part in many indoor and outdoor travel activities than residents of southern Ontario.

Residents of both provinces are more comfortable with outdoor activities than indoor activities. Walking and biking on trails; and visiting parks were the most comfortable activities for both southern Ontario and Quebec residents.

Outdoor and indoor activities were the lowest rated activities in terms of comfort.

⁷² C5: Please rate your current level of comfort with the following activities...

TRAVELLER SENTIMENT: CENTRAL CANADIANS ON ACTIVITIES

Table 15. Likelihood of Taking Part in Different Activities⁷³

Activity	Ontario/Quebec		% Likely	
	Comfort	Likelihood	On.	Que.
Walking or biking on trails	74%	67%	66%	67%
Going to a park or beach	67%	61%	64%	57%
Dining at a restaurant's outdoor patio	63%	58%	58%	58%
Visiting a national or provincial park outdoors	74%	59%	58%	62%
Retail shopping	49%	52%	52%	51%
Dining at a restaurant indoors	41%	44%	41%	48%
Participating in a tour with just my own travel party	62%	45%	49%	38%
Attending an outdoor event (drive in)	55%	37%	38%	35%
Visiting a historic/cultural attraction with indoor exhibits	45%	39%	43%	34%
Visiting a gallery or museum indoors	44%	33%	34%	32%
Watching a parade	38%	31%	34%	26%
Attending an indoor event (less than 50 in attendance)	31%	26%	27%	23%
Attending an outdoor event (50 or more)	25%	27%	30%	22%
Participating in tour with others not in my travel party	31%	21%	25%	14%
Attending an indoor event (50 or more in attendance)	30%	22%	25%	17%

Table 15 shows comfort levels and likelihood of southern Ontario and Quebec residents in taking part in various travel activities. Those from southern Ontario tend to have a higher likelihood of participating in activities than those from Quebec.



⁷³ C6: How likely would you be to take part in the following activities, on a trip in 2020, if they were available?

TRAVELLER SENTIMENT: CENTRAL CANADIANS ON ACCOMMODATIONS

Travellers from southern Ontario and Quebec are most comfortable with accommodations that are not open to the public, such as staying with friends and family, on their own property, or in an accommodation owned by a friend.

Over half of southern Ontario and Quebec travellers (57%) felt comfortable staying in a large hotel, with 44% reporting they would be comfortable staying at a small hotel.

Bed and breakfasts were met with a lower level of comfort: only 38% of southern Ontario and Quebec travellers reported being comfortable staying at a bed and breakfast, while respondents felt slightly more comfortable with campgrounds compared to bed and breakfasts (44%).

⁷⁴ C3: If taking an overnight pleasure trip during the remainder of 2020, how comfortable would you be using each of the following types of accommodations?



Accommodation Types: Travel Comfort Level⁷⁴



77% comfortable staying in their own cottage or a cottage owned by a friend.



66% comfortable staying with family or friends.



57% are comfortable staying in a large hotel chain or resort, 44% at a small hotel or motel.



54% comfortable renting a privately owned accommodation (e.g. Airbnb).



44% comfortable staying at a campground in tent or camper.



38% comfortable staying at a bed and breakfast.

TRAVELLER SENTIMENT: ATLANTIC CANADIANS ON ACCOMMODATIONS

Atlantic Canadians continue to feel most comfortable with accommodations that are not open to the public, such as staying with friends and family, on their own property, or in an accommodation owned by a friend.

Results found small increases in the number of Atlantic Canadians who are comfortable with hotels (large and small) and privately owned rentals.

Among Atlantic Canadians, over half of respondents (59%) felt comfortable staying in a large hotel, with 52% reporting they would be comfortable staying at a small hotel.

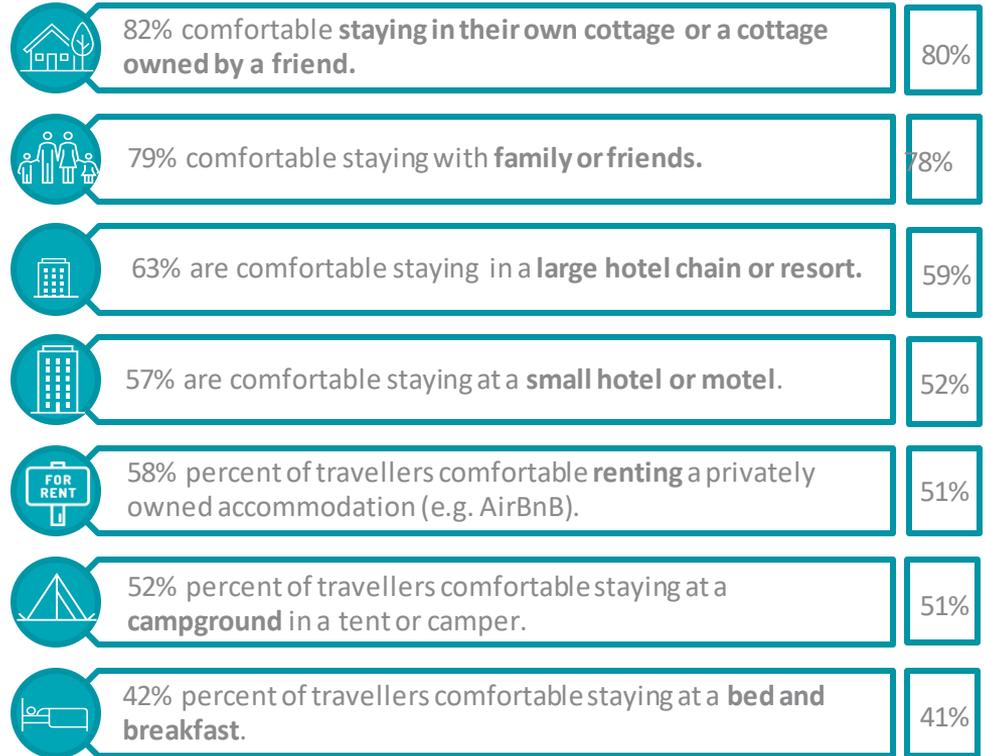
Bed and breakfasts were met with a lower level of comfort: consistent with those from ON and QC, only 41% of Atlantic Canadians reported being comfortable staying at a bed and breakfast, while respondents felt slightly more comfortable with campgrounds than bed and breakfasts (51%).



Accommodation Types: Traveller Comfort Level⁷⁵

Phase 2

Phase 1



⁷⁵ C3: If taking an overnight pleasure trip during the remainder of 2020, how comfortable would you be using each of the following types of accommodations?

TRAVELLER SENTIMENT: MODES OF TRANSPORTATION

Generally, respondents did not feel comfortable with modes of travel that would increase their interaction with others.

Atlantic Canadians were least comfortable traveling by public transit (19%). Transportation options that allow for social distancing were options with which Atlantic Canadians reported feeling comfortable. Travellers from southern Ontario and Quebec were more likely to feel comfortable with travel by train and airplane than Atlantic Canadians.

Survey responses suggest that Atlantic Canadians as well as southern Ontario and Quebec residents are more concerned about transportation than accommodations, citing that they are comfortable with types of transportation, such as trains, taxis, airplanes, and public transit, compared to responses regarding accommodations types. Women were less comfortable than men with travelling by plane, train, public transit, or taxi.

⁷⁶ C4: Please rate your current level of comfort with the following modes of transportation:

Table 16. Mode of Transportation: Traveller Comfort Level⁷⁶

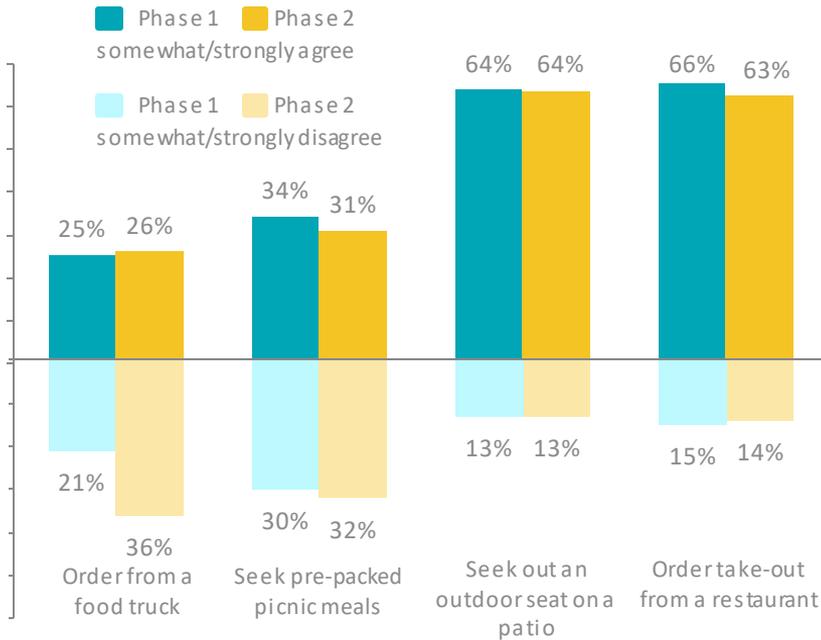
	Atlantic		Ont./Que.
	Phase 1	Phase 2	
Comfortable traveling by ferry (in car)	62%	66%	60%
Comfortable traveling by ferry (via the passenger deck)	43%	45%	42%
Comfortable travelling by rental car	54%	54%	52%
Comfortable travelling by train	29%	28%	45%
Comfortable travelling by taxi	25%	24%	24%
Comfortable travelling by airplane	23%	20%	33%
Comfortable traveling by public transit	18%	19%	23%



TRAVELLER SENTIMENT: EATING OUT (ATLANTIC CANADA)

Graph 11. Attitudes Towards Eating Out^{77,78}

Compared to before COVID-19, I am more likely to...



Atlantic Canadians have changed how they eat out. More than 60% of diners indicated that they are more likely to seek out a patio seat or order takeout than before COVID-19.

Atlantic Canadians feel less comfortable eating inside restaurants. However, they are more likely to choose lower-risk dining options such as eating outside or ordering take out.

Although ordering from food trucks or seeking out pre-packed picnic meals are also dining options that would be considered low risk, fewer respondents wanted to eat out in these ways.



Less than half of Atlantic Canadians (40%) agree that they are just as comfortable eating inside restaurants compared to before COVID-19.

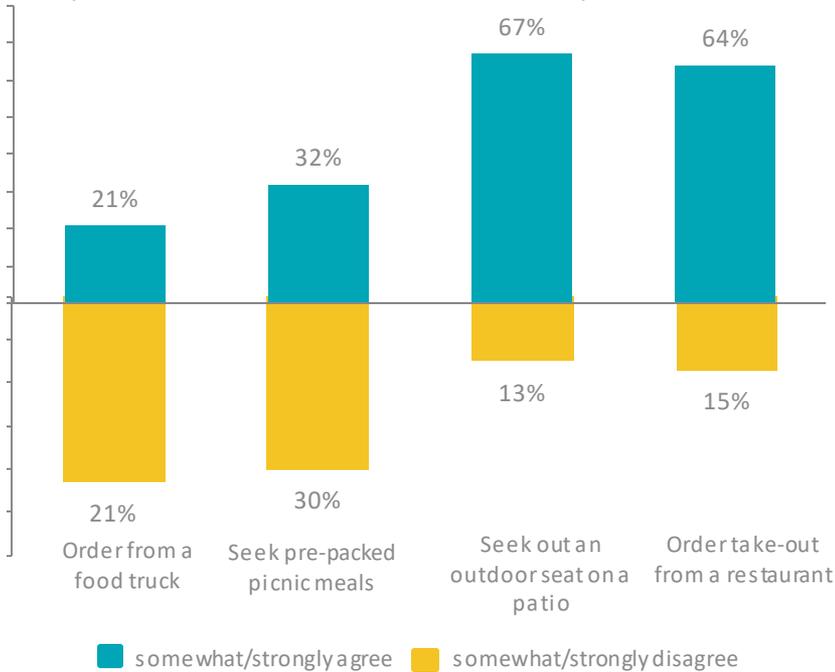
⁷⁷ C8: To what extent do you agree with the following statements? Compared to before COVID-19...

⁷⁸ "Don't know" and "prefer not to say" responses excluded.

TRAVELLER SENTIMENT: EATING OUT (SOUTHERN ONTARIO AND QUEBEC)

Graph 12. Attitudes Towards Eating Out^{79,80}

Compared to before COVID-19, I am more likely to...



Almost 2/3rd of southern Ontario and Quebec residents indicated that they are more likely to seek out a patio seat or order takeout than before COVID-19.

Southern Ontario and Quebec residents feel less comfortable eating out than Atlantic Canadians.



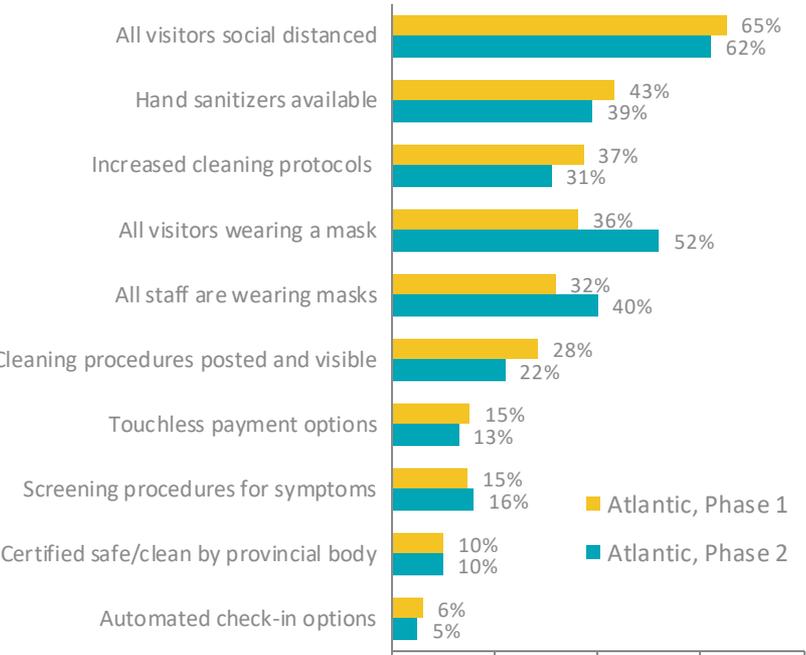
Only 32% of southern Ontario and Quebec residents feel as comfortable eating inside a restaurant as they did prior to COVID-19.

⁷⁹ C8: To what extent do you agree with the following statements? Compared to before COVID-19...

⁸⁰ "Don't know" and "prefer not to say" responses excluded.

TRAVELLER SE

Graph 13. Top 3 Most Impo



⁸¹ C7: What are the three most important measures you would like to see when traveling during the summer or fall of 2020?

⁸² Four percent (4%) responded “Don’t know” or “prefer not to say”

SAFETY MEASURES (ATLANTIC CANADA)

Social distancing remains one of the most important health and safety measures that Atlantic Canadians would like to see when travelling in the remained or 2020.

Sixty-two percent (62%) of respondents indicated that social distancing is one of the top three most important measures they would like to see while traveling in 2020. The importance of masks was recognized by more Atlantic Canadians in Phase 2 than in Phase 1. The share of this group that included visitors wearing masks in their top three increased by 16 percentage points to 52%, while staff wearing masks increased by 8 percentage points. Visitor mask use is seen as being more important than staff mask use (52% vs 40%), with the gap between them growing from Phase 1 to Phase 2. This increased importance of masks likely reflects evolving public health directives and guidance.

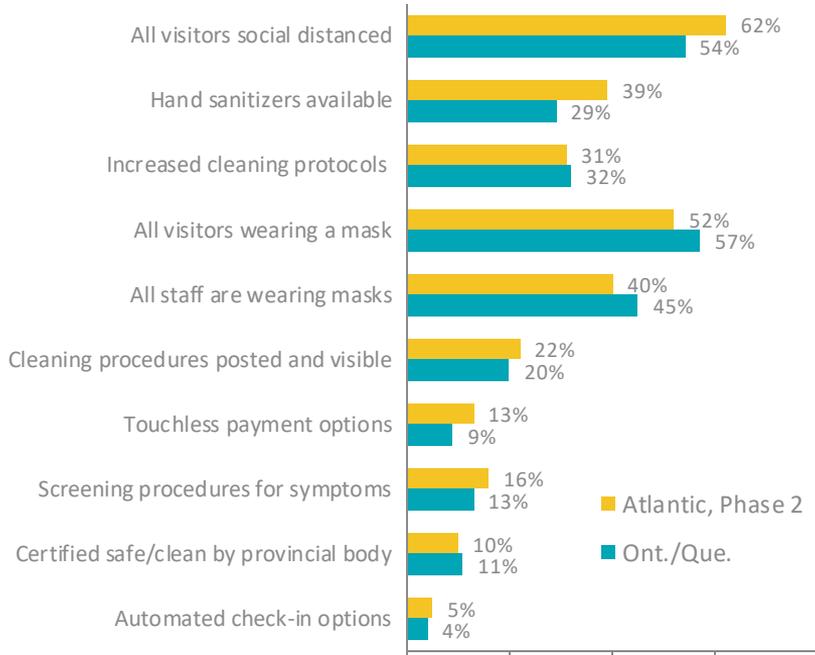
Social distancing and mask-wearing were more likely to be top of mind for respondents who were age 55 or over compared to younger respondents.

Table 17. Top Three most Important Health and Safety Measures by Age^{81,82}

Health/Safety Measures Unaided	Age		
	18-34	35-54	55+
All visitors are social distanced	58%	60%	67%
Hand sanitizers available	46%	42%	34%
All visitors wearing a mask	41%	47%	62%

TRAVELLER SENTIMENT: HEALTH/SAFETY MEASURES (ATLANTIC CANADA)

Graph 14. Top 3 Most Important Health/Safety Measures^{83,84}



Social distancing and mask wearing, followed by hand sanitizer are paramount for southern Ontario and Quebec residents.

Overall, when examining responses to health and safety measures related to COVID-19, southern Ontario and Quebec responded similarly to Atlantic Canadians in Phase 2 data collection with a few slight differences.

Social distancing and hand sanitizers were viewed as measures of top importance by more Atlantic Canadians than southern Ontario and Quebec residents. Wearing a mask was viewed as one of the top 3 most important health and safety measures more frequently by southern Ontario and Quebec residents than Atlantic Canadians.

⁸³ C7: What are the three most important measures you would like to see when traveling during the summer or fall of 2020?

⁸⁴ Four percent (4%) responded "Don't know" or "prefer not to say"

TRAVELLER SENTIMENT: HEALTH AND SAFETY CONCERNS

Many travellers (69% of Atlantic Canadians, 64% southern Ontario and Quebec residents) are concerned about health and safety measures and the possibility of contracting COVID-19 while traveling.

The number of COVID-19 cases in an area and the presence of safety measures impacts travel destination and decisions to visit attractions. Ninety percent (90%) of Atlantic Canadians and 77% of southern Ontario and Quebec residents say it would influence their choice of travel destination. Requirements to wear a mask was also a factor in reported likelihood to explore while travelling, with 62% of Atlantic Canadians and 69% of southern Ontario and Quebec residents stating they would be more likely to explore where masks were mandatory.

Table 18. Travel decisions.^{85,86}

To what extent do you agree with the following?	Atlantic	Ont./Que.
The number of COVID-19 cases in an area would influence my choice of travel destination.	90%	77%
I am more likely to explore a place where wearing a mask is mandatory	62%	69%

⁸⁵ C9: The number of COVID-19 cases in an area would influence my choice of travel destination.

⁸⁶ I am more likely to explore a place where wearing a mask is mandatory

TRAVELLER SENTIMENT: OTHER TRAVEL CONCERNS BY PROVINCE

There were significant differences between provinces, both within Atlantic Canada and between southern Ontario and Quebec, when it came to traveller concerns. Newfoundlanders tend to be more concerned about travel than other Atlantic Canadians, as were residents of southern Ontario.

Table 19. Top Travel Concerns by Province ^{87,88}	Atlantic				Central Canada	
	NL	NS	NB	PEI	On.	Que.
Knowing if the local residents would welcome visitors	54%	43%	41%	44%	63%	54%
Knowing if tourism businesses and attractions are open	58%	54%	47%	45%	67%	60%
Increased wait times due to restrictions	53%	47%	42%	37%	62%	53%
Having to self-isolate when I arrive or return home	63%	53%	49%	50%	72%	66%
Knowing if other services will be available	50%	44%	37%	35%	62%	46%
Not being able to return home due to travel restrictions	63%	50%	43%	48%	69%	59%
Losing money if I have to cancel or change plans	67%	57%	51%	52%	76%	60%
Ensuring businesses have health/safety measures	75%	65%	58%	59%	59%	52%
Ensuring people respect social distancing measures	72%	68%	63%	61%	58%	59%
Contracting COVID-19 while travelling	82%	66%	63%	68%	64%	63%

As shown in Table 19, Newfoundlanders were more concerned about most aspects of travel compared to their counterparts in other Atlantic Canadian provinces, particularly in New Brunswick.

Southern Ontario residents were generally more concerned than those from Quebec, though these two groups responded similarly to social distancing measures and contracting COVID-19.

The top concern for residents of each Atlantic Province was either contracting COVID or respect for social distancing. Understandably, the top concern for both southern Ontario and Quebec residents was the need to self-isolate.

⁸⁷ B5: To what extent, if at all, would you be concerned with each of the following while travelling within Atlantic Canada during the remainder of 2020?

⁸⁸ “Don’t know” and “prefer not to say” responses excluded.

TRAVELLER SENTIMENT: OTHER TRAVEL CONCERNS BY AGE

There were also key differences between provinces when it came to age as it related to traveller concerns: generally, older Central Canadians tended to be more concerned about aspects of travel compared to younger travellers.

Older residents of Central Canada were generally more concerned about the COVID-related aspects of travel. The only exception was the concern about contracting COVID while travelling: nearly seven in 10 (67%) members of the 18-34 group were concerned about contracting COVID-19.

In some cases, younger Central Canadians were more concerned than those ages 35 to 54, including knowing if businesses are open, not being able to return home, and contracting COVID. The exception where the middle age group was more concerned was knowing if other services would be available.

Among Atlantic Canadians, the age group most concerned about COVID-related impacts varied by specific consideration. For example, the age group expressing the most concern about losing money was the 18-34 cohort, while middle age residents were most concerned about increased wait times to businesses.

Table 20. Top Travel Concerns by Age ^{89,90}	Atlantic			Central Canada		
	18-34	35-54	55+	18-34	35-54	55+
Knowing if the local residents would welcome visitors	44%	47%	43%	50%	54%	71%
Knowing if tourism businesses and attractions are open	56%	55%	48%	63%	57%	72%
Increased wait times due to restrictions	45%	50%	44%	57%	55%	62%
Having to self-isolate when I arrive or return home	52%	54%	55%	65%	66%	76%
Knowing if other services will be available	40%	45%	42%	45%	56%	62%
Not being able to return home due to travel restrictions	50%	50%	51%	68%	55%	71%
Losing money if I have to cancel or change plans	63%	60%	51%	71%	66%	72%
Ensuring businesses have health/safety measures	62%	63%	68%	52%	54%	62%
Ensuring people respect social distancing measures	62%	65%	71%	58%	56%	60%
Contracting COVID-19 while travelling	64%	66%	73%	67%	59%	65%

⁸⁹ B5: To what extent, if at all, would you be concerned with each of the following while travelling within Atlantic Canada during the remainder of 2020?

⁹⁰ "Don't know" and "prefer not to say" responses excluded.



Section 4:

TRAVELLER PLANNING PREFERENCES

TRAVELLER PLANNING PREFERENCES

Travellers prefer to find travel information online. Respondents in Atlantic Canada, southern Ontario, and Quebec all showed a preference for using general searches as a first choice when searching out information.

Southern Ontario and Quebec residents showed a slight preference for using travel agencies, with more Ontario and Quebec residents citing review websites compared to those from Atlantic Canada. More Atlantic Canadians ranked provincial tourism websites and websites for specific locations as being their preferred way to find travel information.

Table 21. Atlantic Canadians First Choice for Finding Travel Information⁹¹

Preferred Way to Find Travel Information	Atlantic	Ont./Que.
Search engines (e.g. Google, Bing, Yahoo)	25%	23%
Websites for specific hotels, attractions, or restaurants	12%	10%
Provincial tourism websites	12%	6%
Websites for specific cities, towns, or villages	11%	9%
Traveller review websites (e.g. Trip Advisor)	8%	11%
Speaking to a travel agent in person or on the phone	8%	11%
Online travel agencies (e.g. Expedia)	7%	10%
Online social network (e.g. Facebook, Twitter, Instagram)	5%	7%
Visitor information centres	4%	4%
Map applications (e.g. Google Maps)	3%	4%
Asking local residents when arriving at your destination	3%	3%
VRBO/AirBnB	2%	2%

⁹¹ C12: Where do you prefer to find your travel information?

TRAVELLER PLANNING PREFERENCES

In addition to searching for travel online, travellers in Atlantic Canada, southern Ontario, and Quebec also show a preference for booking travel directly with the company.

Travellers prefer to go directly to the company to book travel, either by phone or online. Using Expedia, tourism websites, and booking through a travel agent were also selected by a smaller portion of respondents.

Table 22. Atlantic Canadians First Choice for Booking Travel⁹²

Preferred Way to Book Travel	Atlantic	Ont./Que.
Directly with the company <i>online</i>	34%	23%
Directly with the company <i>by phone</i>	17%	17%
Expedia	14%	16%
Through a travel agent	10%	16%
Provincial tourism websites	9%	16%
Booking.com	6%	5%
VRBO/AirBnB	4%	3%
Kayak	1%	2%
Other	4%	2%

⁹² C13: How do you prefer to book your travel?

TRAVELLER PLANNING PREFERENCES: TECHNOLOGY USE

Atlantic Canadians are generally amenable to using technology to facilitate both planning for travel and enjoying activities safely while traveling. Central Canadians are slightly less comfortable.

Graph 15. Technology and Travel Comfort Levels^{93,94}



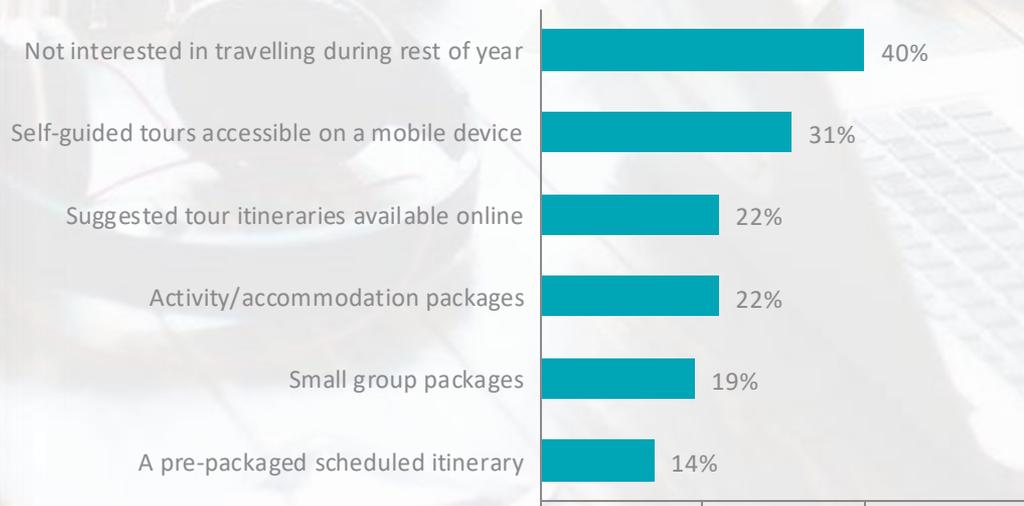
⁹³ C10_1: How comfortable are you doing each of the following? Using...

⁹⁴ Percentages may exceed 100% due to multiple responses. "Don't know" and "prefer not to say" responses excluded.

TRAVELLER PLANNING PREFERENCES: VACATION TYPES (ATLANTIC CANADA)

Self-guided tours accessible on a mobile device were of interest to around a third of Atlantic Canadians. Travel options that suggested pre-planning for a larger portion of a trip than a tour were of less interest to Atlantic Canadians.

Graph 16. Interest in Different Vacation Options^{95,96}



⁹⁵ C10: Which of the following types of vacation options would you be interested in if travelling during the remainder of 2020?

⁹⁶ Percentages may exceed 100% due to multiple responses. "Don't know" and "prefer not to say" responses excluded.

Although pre-packaged itineraries, small group packages, and activity/accommodation packages only appealed to between 14% and 22% of Atlantic Canadians, these travel options were generally more appealing to Atlantic Canadians ages 18 to 34.

Twenty-nine percent (29%) of young Atlantic Canadians indicated that they were interested in small group packages compared to 19% overall.

Twenty-eight percent (28%) of young Atlantic Canadians indicated that they were interested in activity and accommodation packages compared to 22% of the overall sample.

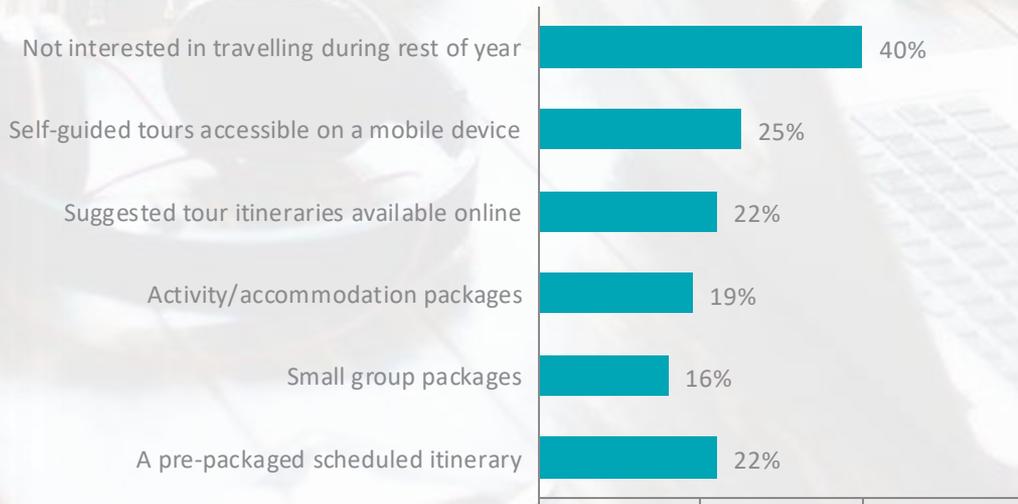
While 40% of the overall sample said they have no interest in travelling for the remainder of 2020, young Atlantic Canadians were less likely to respond this way (29%).

TRAVELLER PLANNING PREFERENCES: VACATION TYPES (SOUTHERN ONTARIO AND QUEBEC)

Self-guided tours accessible on a mobile device were of interest to a quarter of residents of southern Ontario and Quebec. Pre-packaged (22%), self-guided (25%), and online tour itineraries (22%) were also of interest to this group.

Small group packages only appealed to 16% of residents of southern Ontario and Quebec. The appeal for this type of planning was fairly consistent across gender, age, and province.

Graph 17. Interest in Different Vacation Options^{97,98}



While activity/accommodation packages were of interest to just one-fifth (19%) of residents of southern Ontario and Quebec, there was more interest among the 18 to 34 age group and residents of southern Ontario.

Similar to Atlantic Canadians, 40% of the overall sample said they have no interest in travelling for the remainder of 2020, young Central Canadians were again less likely to respond this way (27%). Women (54%) were more likely than men (30%) to say they are not interested in travelling, driving much of the gender divide when it comes to expressed interest in vacation options.

⁹⁷C10: Which of the following types of vacation options would you be interested in if travelling during the remainder of 2020?

⁹⁸ Percentages may exceed 100% due to multiple responses. "Don't know" and "prefer not to say" responses excluded.



Section 4:

CONCLUSIONS AND RECOMMENDATIONS

CONCLUSIONS

The key take-aways from Phase 1 and Phase 2 of the Atlantic Canadian Tourism Study are summarized below:

COVID-19 significantly impacted travel plans for Atlantic Canadians.

COVID-19 disrupted much of the previously planned travel for Atlantic Canadians. At the time of the Phase 1 survey, 65% of Atlantic Canadians reported that the COVID-19 pandemic affected their travel plans. Another 19% were not sure if their plans would be affected.

There are fewer trips planned now than before COVID-19.

As of Phase 1, Atlantic Canadians had fewer trips planned than before COVID-19. The average number of trips per person dropped from 2.3 trips before the arrival of the pandemic to 1.8 trips per person after the arrival of the pandemic. The overall number of trips reported by Atlantic Canadians dropped by 61%. However, it could have been that Atlantic Canadians were taking a wait-and-see approach before cancelling plans to visit a particular destination or reallocating funds from a trip that might still happen.

Atlantic Canadians were holding off on making decisions about some previously planned trips.

Seventy percent of those who have had travel affected by COVID-19 were waiting for more information before deciding what to do about their affected travel. This could include changing the destination of travel that was cancelled, or continuing on with a previously planned trip with a different itinerary or accommodation.

The constantly-changing nature of the situation, from public health guidelines for businesses and individuals, to changing travel restrictions, made it difficult for respondents to plan. It was difficult for Atlantic Canadians to predict if previously-planned travel will go forward and if Atlantic Canadians can, or should, book a new trip in place of cancelled plans.

CONCLUSIONS

Where are Atlantic Canadians currently planning to travel?

Atlantic Canadians will be staying close to home in their planned travel and will be seeking out new experiences at home.

Most (83%) of currently planned travel is in Atlantic Canada; three in five (61%) of these trips are planned for Nova Scotia, one-quarter (26%) in Newfoundland and Labrador, 41% in New Brunswick, and 19% in Prince Edward Island. Although, the provincial share of Atlantic Canada travel was similar in Phase 1 and 2, planned travel to NS increased by ten percentage points, while plans for the other three provinces remained steady or declined slightly.

Atlantic Canadians are traveling to relax and visit with friends and family. Atlantic Canadians will travel within their own province, primarily to discover new experiences, such as exploring parts of the province they haven't seen, visiting new restaurants, and visiting attractions they have never seen.

Where are Ontario and Quebec residents currently planning to travel?

Ontario and Quebec residents will be staying close to home in their planned travel and will be seeking out new experiences at home.

The bulk of planned travel for Ontario and Quebec residents and is set to take place within Central Canada; with a comparatively smaller share (14%) planned for Atlantic Canada. One in ten trips are planned for Nova Scotia, 5% in Newfoundland and Labrador, 5% in New Brunswick, and 3% in Prince Edward Island. Notably, planned travel to Atlantic Canada is lower than international destinations (20%) – even when the US is excluded. On the other hand, travel intentions to western Canada are more modest – with only BC barely exceeding single digits (11%).

Ontario/Quebec residents are traveling to relax and visit with friends and family. Atlantic Canadians will travel within their own province, primarily to discover new experiences, such as exploring parts of the province they haven't seen, visiting new restaurants, and visiting attractions they have never seen.

CONCLUSIONS

Transportation and Accommodation

Atlantic Canadians continue to feel most comfortable with non-commercial accommodation (i.e., staying with friends and family, on their own property, or in an accommodation owned by a friend). Comfort with all accommodation types registered increases in August compared to June/July. Increased comfort was generally very modest except for privately owned (e.g., Airbnb) rentals (+7%), large hotels (+4%) and small hotels and motels (+5%).

This accommodation comfort ranking for ON and QC was consistent with Atlantic Canadians, although ON/QC comfort was generally slightly lower. Bed and breakfasts (38% and 42%) and campgrounds (44 and 52%) registered the lowest comfort level with both ON/QC and Atlantic Canadians respectively.

Many travellers feel uncomfortable with transportation modes that increase their interaction (direct and direct) with others. At best, 66% of Atlantic Canadians and 60% of ON/QC residents were comfortable travelling by ferry (remaining in their car) in August.

Atlantic Canadians feel more at ease booking accommodations than transportation, especially transport options that do not always allow for social distancing.

Survey responses suggest that Atlantic Canadians are generally more comfortable with managing accommodations than transportation when travelling, with far fewer Atlantic Canadians citing that they are comfortable with types of transportation, such as trains, taxis, airplanes, and public transit, compared to responses regarding accommodations types.

CONCLUSIONS

Food

Eating at restaurants is a less comfortable option right now, but outdoor and take-out are still viable options for travellers. Year-round, outdoor restaurant dining is the norm in parts of northern Europe and some Canadian cities such as Montreal. There may be opportunities to change the consumer mindset toward outdoor dining in Atlantic Canada and providing related amenities (e.g., heaters, blankets). Diners could be encouraged to embrace outdoor dining in cooler weather.

Health and Safety Are Concerns for Travellers

Travellers are most concerned with social distancing measures being in place while travelling, followed by being able to sanitize their hands while travelling, and are cognizant of the potential for contracting COVID-19. However, this varied by age. Sixty-five percent of respondents indicated that social distancing is one of the top three most important measures they would like to see while traveling in 2020. Just under half (43%) of respondents mentioned the availability of hand sanitizers.

The Uncertainty Of Mid-pandemic Travel Is Also Weighing On Travellers

More than half of Atlantic Canadians are concerned about availability of amenities. Travellers are concerned about losing money and possible last-minute cancellations.

CONCLUSIONS

Outside of the Atlantic provinces, restricted travel and public health precautions that limit capacity for tourism operators are still in place five months following the initial announcement of COVID-19 as a global pandemic. The easing of restrictions in Atlantic Canada has been and continues to be a gradual process that will likely not be linear. Already we have seen restrictions that were rolled back tightened up again in some areas to keep small instances of COVID-19 spread under control.

Despite the tourism industry being poised and ready to welcome back domestic travellers from within Atlantic Canada for the last half of 2020, consumer confidence and travel behaviour suggest that recovery on the demand side of the industry may be slower to return.

The conclusions and recommendation discussed here are drawn from the primary data collected by the Atlantic Canadian Tourism Survey and represent the consumer sentiment in late June and early July.

Overall, the results highlight the significant impact of the pandemic on Atlantic Canadian travellers and the tourism industry in the region. The survey highlights domestic travel as a source of some relief for the industry as 51% of Atlantic Canadians select new travel destinations to replace travel that was previously planned for outside of Atlantic Canada. The uncertainty of the current climate is also leaving a lot of potential on the table with the fluid situation impacting travellers ability to plan, 70% reported that they were holding off in making decisions.

Travellers are concerned about having to make last minute cancellations, losing money and what a vacation will look like with business closures and, health and safety measures in place. At the same time, health and safety is still very much top of mind for travellers. People are showing trepidation to engage in group experiences and even medium sized events. Results show travellers are leaning towards outdoor experiences and are likely to make cautious choices in transportation, accommodation and food, in particular those over the age of 55.

RECOMMENDATIONS

Restoring Traveller Confidence & Trust

The data suggests that health and safety concerns remain paramount among Atlantic Canadians at this time. Increasing confidence and rebuilding trust among travellers will be essential to sector recovery planning. Atlantic Canadians indicated a higher level of comfort with accommodations, modes of transportation and activities that allow them to control their own level of risk. To increase travellers comfort level, businesses need to be able to effectively communicate that health and safety measures are being followed. Assurances such as the ability to physical distance, availability of hand sanitizer and requiring masks will likely play a role in increasing participation in the tourism industry.

One strategy for consideration is the creation and promotion of “safe and dean” labels for businesses. A business could complete a self-assessment or have an independent audit conducted of their location, if set criteria are met that business could display a seal of approval that they are meeting the province’s health and safety standards. This would instill confidence in tourists that the industry is prepared to take in visitors; particularly for areas where comfort is lowest, such as small accommodations, eat-in dining establishments, and indoor event spaces.

Case Study: “Gros Morne Safe & Clean” Business Program in Newfoundland and Labrador⁹⁹

- As part of their overarching “Safe & Clean” initiative, the Gros Morne region in Newfoundland and Labrador also advertises the “Safe & Clean Certified” designation to local licensed businesses.
- This certification indicates that businesses are going above and beyond public health guidelines and industry standards on health and safety.
- This program requires that staff of businesses take additional *Clean It Right* training provided by the Manitoba Tourism Education Council, complete a COVID-19 staff checkup prior to working, and that all guests complete and submit pre-arrival forms.
- The goal for programs such as “Safe & Clean” are to address health and safety concerns and re-establish trust among visitors.

⁹⁹ Gros Morne “Safe & Clean” webpage: <https://visitgrosmorne.com/staycation/gros-morne-safe-and-clean/>

RECOMMENDATIONS

Communication

The health and safety measures that are emphasized by public health are clearly reflected what travellers want to see implemented on their travels. Encouraging provincial public health officials to emphasize travel safety in the context of overall health protocols will increase confidence in travel safety.

Provincial protocols vary across the Atlantic Province's. Individual provinces should highlight protocols that are likely to differ between home province and destination province (e.g., mask requirements in indoor public spaces) to help visitors adjust expectations and prepare accordingly.

Tourism promotion may include supplementary messaging about the visitor's responsibility to adhere to guidelines. This serves the dual purpose of supporting safe practices among guests, while reassuring other guests that their fellow travelers will behave responsibly.

RECOMMENDATIONS

Stimulating Demand

To stimulate demand, promotional campaigns targeted at attracting Atlantic Canadians and emphasizing regional travel and “staycations” may push people considering postponing travel to participate in the 2020 tourism season. Focus of the messaging should be on promoting the idea of “safe travel” within the region and showcasing local experiences as a great way to still experience travel in 2020 without travelling outside Atlantic Canada.

Part of this promotion could include working with businesses to communicate critical information on online platforms for potential visitors, such as information on last-minute booking availability, packages, and any discounts and promotions, as well as promoting flexible cancellation policies.

Although promotional campaigns should be targeted to all potential visitors, one key target group for this should be the individuals who are undecided (i.e., the people who are unsure about whether they want to travel in the current situation, but who can be swayed through communicating the right information about safety and public health).

Case Study: Explore NB Travel Incentive Program¹⁰⁰

- In order to encourage people be ‘tourists in their own backyard’, the Government of New Brunswick’s Department of Tourism, Heritage, and Culture launched the Explore NB Travel Incentive Program, which encourages New Brunswick residents to travel within their home province this late-summer and fall tourist season.
- Tourists can submit local travel expenditure claims and can receive a 20% rebate on up to \$1,000 of eligible travel expenses.

Case Study: PEI’s Canada’s Food Island Gift Card Program¹⁰¹

- The Government of Prince Edward Island is providing a 20% discount during the program period on Canada’s Food Island Gift Cards starting the week of September 28th, 2020.
- These gift cards are prepaid cards that can be used at registered local merchants across the Island and do not expire.

¹⁰⁰ Explore NB Travel Incentive Program webpage: <https://www2.gnb.ca/content/gnb/en/departments/thc/tourism/content/incentive-program.html>

¹⁰¹ Canada’s Food Island Gift Card Program webpage: <https://giftcard.canadasfoodisland.ca/>; CBC News, “Tourism operators start taking advantage of P.E.I. gift card plan today”: <https://www.cbc.ca/news/canada/prince-edward-island/tourism-operators-start-taking-advantage-of-p-e-i-gift-card-plan-today-1.5711036>

RECOMMENDATIONS

Despite the low number of cases in Atlantic Canada and more established precautionary measures, a small segment of potential travellers are uncomfortable with even the lowest risk activities (e.g., walking or biking outdoors). Marketing expectations should reflect this reduced market potential while still appealing to the remaining majority that are already comfortable or require limited reassurance. In other words, the tourism experience should be the primary message with supplementary reassurance of safety.

Most tourism operators are experiencing challenges with reduced demand. This is exacerbated by the current Atlantic bubble. There is an opportunity to position the Atlantic bubble as an opportunity until current restrictions are lifted with a message around “VIP / exclusive access”. Reduced travel activity in the late summer / fall could be positioned as a once in a lifetime opportunity for Atlantic Canadians to uniquely enjoy tourism experiences in their home Region (e.g., reduced wait times, less crowded, improved access, enhanced value).

Despite the diminishing time available in 2020 for residents of southern Ontario and Quebec still plan to travel to the Atlantic Region, there continues to be a robust potential (14%). This suggests that even at this late stage of the season, there continues to be an opportunity to attract visitors from these mid-range markets should bubble restrictions be lifted.

Findings suggest that residents of southern Ontario and Quebec plan to be very active during their visit to AC, and their activity preferences differ from regional residents. Marketing will need to reflect this.

RECOMMENDATIONS

Industry Support

Government and industry associations recognize the financial strain that many small businesses are facing at this time. Smaller operations may find it challenging to meet public health requirements and regulations, or source in-demand materials such as disposable masks. In order to help businesses gain trust of potential visitors, it is imperative the industry associations and government organizations support smaller businesses so that they are safe for visitation and are meeting public safety standards.

Industry associations, for example, can help with sourcing necessary supplies (such as masks) for small operations, or provide guidance to ensure their locations are set up to allow for physical distancing. Associations may also be able to support small businesses with communication and marketing health and safety measure that their members are taking.

Small businesses may also require additional staff to adhere to new more rigorous standards for cleaning. Government programming could help finance and match these businesses with temporary workers to ensure health and safety standards can be met. Many temporary or seasonal workers are currently without work due to the impact of COVID-19. This type of matching program and financial support would help businesses as well as supporting workers negatively impacted by the pandemic.

Welcome to
**DINE NOVA
SCOTIA**



By the Restaurant
Association of Nova Scotia

Our mission is to continuously make a positive
impact for the restaurant industry in Nova Scotia.
[More Info »](#)



Case Study: Restaurant Association of Nova Scotia

- The Restaurant Association of Nova Scotia has an online platform that promotes local eateries across the province, by showcasing restaurant updates (identifying which restaurants are dine in vs. takeout only, for example), advertising coupons, and listing any events that are related to local eateries.
- To help their members cope with COVID-19, the Association offers regular health and safety protocols updates, as well as webinars.

RECOMMENDATIONS

Sentiment Shift Due to Lifted Travel Restrictions

Lifting travel restrictions is essential to bring in tourism dollars from visitors outside of Atlantic Canada, however it is important to be cognizant of and prepare for the impact that the lifting of travel restrictions may have on local traveller sentiment and intent. Seventy (70%) of local (Atlantic Canadian) travellers stated they will wait for more information to make a decision about their travel plans. Given the degree of concern among Atlantic Canadian tourists about health and safety related to COVID-19, there is a risk that opening borders to the rest of Canada may heighten their fears surrounding travel, which could further dampen domestic travel. In other words, Atlantic Canadians may feel more reserved about travel if Canadians from outside the current “Atlantic Canada Bubble” will be visiting the region. This may pose a challenge, as the loss of local tourists due to this fear may not be made up by the proportion of tourists that may come from other Canadian provinces.

In order to encourage Atlantic Canadians to travel in the region (and not lose potential travellers out of a potential fear of COVID-19 resurfacing from other Canadian travellers), focus should be placed on continuing to build confidence and trust in our health and safety measures and on messaging – specifically, communicating the effectiveness of the health and safety measures and the importance of welcoming visitors from throughout Canada.

Physical distancing and hand sanitization and more recently wearing masks, have been some of the most prominent and consistent messaging coming from leadership in public health. That these measures are the top things that Atlantic Canadian travellers want to see when travelling suggests that the public is listening. Messaging from public health leadership that travel and lifting travel restrictions is safe will significantly reduce any potential negative impact of lifted restrictions on traveller sentiment.