

CANADA TRAVEL INTENTIONS RESEARCH

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- Survey across Canada
- **Wave 1** in June 2020, **Wave 2** in July 2020
- 9,050 respondents per wave
- Weighted to be reflective of Canadian population
- Results available nationally and by province

EXECUTIVE SUMMARY

TOURISM AND THE ECONOMY

- A large majority of Canadians, and almost all Nova Scotians, believe that ***tourism is important*** to the country's economy.
- Almost eight in 10 say ***domestic travel*** is good for the country, and nearly two-thirds agree that ***international visitors*** are good for Canada.

IMPACT OF COVID-19 ON TRAVEL

- COVID-19 has forced Canadians to drastically alter their 2020 travel plans, with residents far more likely to plan visits to destinations ***close to home*** than originally intended. This is especially true in terms of international travel.
- Despite the apparent reluctance of venturing too far, Canadians remain moderately interested in leaving their province to visit ***other parts of the country***.

TRAVEL PLANNING IN 2020

- The **shorter** the trip and the **closer** the destination to home, the more likely Canadians are to travel. The majority of Canadians feel comfortable travelling within their province during the summer months.
- For a significant minority of Canadians, a COVID-19 vaccine is a **pre-condition of travel**, depending on destination. Two in 10 Canadians are only comfortable visiting other parts of Canada once a vaccine is available.
- For Canadians who are comfortable visiting other provinces, one-quarter would consider **Nova Scotia**, with far higher shares of Atlantic residents considering Nova Scotia.
- Similar to pre-COVID-19 reasons for travel, the most likely reasons for travel over the next year remain **visiting friends and relatives** and **pleasure**.

TRAVEL PLANNING IN 2020 cont'd

- As COVID-19 **lockdowns eased** between June and July, the likelihood of travelling has declined, suggesting Canadians may not be quite as ready to travel as they thought they would be.
- Canadians plan to use a **variety of accommodation** types for their next trip.
- Consistent with Wave 1 results, Canadians say they're most likely to visit locations that are **familiar, outdoors**, and that **limit social interaction**.
- Hiking, natural attractions, parks, and other **outdoor activities** are of most interest to Canadian travellers. **Nova Scotia** is well suited to serve these interests.
- Relatively few Canadians indicate interest in using any type of **paid transportation** for their travel. Of those that are considering paid transportation, they are most likely to want to **travel by air** and **rent a car** over any other methods. Comparatively, Atlantic residents are far less comfortable with air travel.

OPERATOR PRACTICES

- Full ticket refunds or discounted travel deals would encourage a minority of Canadians to make bookings. However, a larger share of Canadians are more likely to ***not be motivated*** by such offers.
- In terms of safety practices, Canadians remain most interested in operators with strict ***cleaning*** and physical ***distancing*** protocols, use of ***masks*** for both customers and employees, and activities with ***limited group sizes***.
- For ***hotels*** and ***restaurants***, the most important concerns for Canadians are hand sanitizer being provided, having well-explained and visible cleaning practices, social distancing being enforced, and staff wearing masks.

IMPORTANCE OF TOURISM

IMPORTANCE TO ECONOMY

	Canadians	Nova Scotians
Very/somewhat important	86	96
Not very/not at all important	2	1

- *Note: New question in Wave 2.*
- In your opinion, how important is the tourism industry to Canada's economy?
- Table shows % choosing each option.

- There is a strong belief among Canadians, and particularly Nova Scotians, that tourism is important to the country's economy.

TRAVEL GOOD FOR CANADA

Domestic Travel	Canadians	Nova Scotians
Strongly/somewhat agree	77	79
Strongly/somewhat disagree	6	10

- *Note: New question in Wave 2.*
- Canadian visitors travelling domestically are good for Canada?
- Table shows % choosing each option.

- Most Canadians and Nova Scotians agree that domestic travel is good for Canada.

International Travel	Canadians	Nova Scotians
Strongly/somewhat agree	63	63
Strongly/somewhat disagree	17	22

- *Note: New question in Wave 2.*
- Visitors from other countries are good for Canada?
- Table shows % choosing each option.

- A smaller majority of both Canadians and Nova Scotians agree that foreign visitors are good for the country.

TRAVEL INTENTIONS

DESTINATION CHOICE

	Canadians		Nova Scotians	
	Original plan	Current plan	Original plan	Current plan
Other communities near you	11	22	13	30
Other parts of your province	22	39	26	48
Other parts of Canada	27	25	32	26
The United States	26	6	17	3
Other countries (outside of the United States)	24	7	16	3
No plans	31	34	31	32

- *Note: New question in Wave 2.*
- Thinking of any 2020 travel plans you had made before COVID-19 and related government restrictions, where were you originally intending to travel? / Now, as government restrictions related to COVID-19 are relaxed, where are you currently planning to travel in 2020? Table shows % selecting each type of location.
- Many Canadians who had previously planned to travel still plan to do so, but closer to home. This is especially the case for international travel.
- Compared with where they planned to travel pre-COVID, Canadians overall are as likely to indicate they will travel to another province/territory, while Nova Scotians are now slightly less likely to indicate they will travel to another province/territory.

REASONS TO TRAVEL

	Canadians		Nova Scotians	
	Wave 1	Wave 2	Wave 1	Wave 2
Visiting Friends and Relatives	48	41	46	38
Leisure/Pleasure	43	39	39	32
Business Meetings	10	8	8	3
Conferences/Conventions	9	8	11	5

- How likely are you to travel in the next year for the following reasons as government restrictions related to COVID-19 are relaxed?
- Table shows % definitely or very likely to travel for each reason.
- Nationally, the likelihood to travel to visit friends/relatives or for pleasure declined between Wave 1 and Wave 2.
- Among Nova Scotians, the likelihood to travel declined across all trip purpose categories.

DURATION OF TRIP

	Canadians		Nova Scotians	
	Wave 1	Wave 2	Wave 1	Wave 2
A trip of 1 night	36	32	31	27
A trip of 2 nights	35	33	32	24
A trip of 3-4 nights	30	28	25	21
A trip of 5-6 nights	24	22	19	15
A trip of 7+ nights	23	20	20	12

- Thinking of your next vacation as government restrictions related to COVID-19 are relaxed, how likely are you to take a trip of the following durations?
- Table shows % definitely or very likely to travel for each duration.
- The likelihood to travel for all durations is fairly steady for Canada overall. However, Nova Scotians show a declining likelihood to take trips of all durations, reflective of a general reduction in travel intentions among Nova Scotians.

ATTITUDES ABOUT TRAVEL

	Canadians		Nova Scotians	
	Wave 1	Wave 2	Wave 1	Wave 2
I will visit destinations that I know well or have visited before.	52	49	55	50
I will visit and participate in <i>outdoor</i> attractions and activities.	52	51	54	46
I miss travel. I can't wait to get out and travel again.	51	51	49	40
I will only do one or two things per day to limit social interaction.	46	48	45	48
I will spend <i>less</i> than I did on vacations pre-COVID-19.	38	41	36	40
I will visit new destinations that I have never visited before.	37	35	33	29
I will visit and participate in <i>indoor</i> attractions and activities.	31	28	31	20
I will fill my days with as many attractions/activities as possible.	23	23	23	18
I will spend <i>more</i> than I did on vacations pre-COVID-19.	14	13	13	7

- Thinking of your next vacation, as government restrictions related to COVID-19 are relaxed, how much do you agree or disagree with the following statements?
- Table shows % strongly or somewhat agree with each statement.

ATTITUDES ABOUT TRAVEL

- For Canadians overall, there has been little change in attitudes about travel from Wave 1 to Wave 2. About one-half of Canadians express a preference for destinations and activities that are familiar, are outdoors and that limit social interaction. A substantial minority say they will spend less on vacations than before COVID-19.
- Nova Scotians are increasingly likely to say they miss travelling and can't wait to get out again. However, in terms of specific activities, their likelihood to take part in both outdoor and indoor activities has declined.

TRAVEL ACTIVITIES

	Canadians		Nova Scotians	
	Wave 1	Wave 2	Wave 1	Wave 2
Hiking or walking in nature	50	48	45	44
Natural attractions like mountains or waterfalls	46	46	44	43
Trying local food and drink	46	45	52	47
Nature parks	43	42	46	39
City green spaces like parks or gardens	37	36	36	36
Camping	34	34	36	28
Viewing wildlife or marine life	34	33	37	33
Fall colours	30	32	38	42
Self-guided driving tours or road trips	31	31	33	31
Shopping for clothes and shoes	31	29	32	30
Historical, archaeological or world heritage sites	29	28	32	26
Fine dining	27	26	25	20
Northern lights	26	26	18	24
Shopping for items that help me remember my trip	28	26	29	30
Breweries or wineries	26	25	25	23
Food and drink festivals or events	26	25	26	22

- Thinking of your next vacation as government restrictions related to COVID-19 are relaxed, what activities or places are you interested in while on vacation?
- Table shows % interested in each activity.

TRAVEL ACTIVITIES

- There has been little change from Wave 1 to Wave 2 in terms of interest in particular activities. While Canadians remain most interested in outdoor nature activities and in trying local food and drink, Nova Scotians show a softening interest in nature parks and camping.
- Notably, interest in the various activities is similar to general pre-COVID travel activity interests.

TIMING OF TRAVEL

CANADIANS	Jul-Aug 2020*	Sep-Dec 2020	In 2021	When there is a vaccine	Don't know
Communities near you	38	16	20	13	14
Other parts of your province	34	19	18	13	15
Other parts of Canada	14	19	28	20	19
The United States	3	6	19	49	22
Other countries (outside of the United States)	3	7	22	44	25

- Given the current situation with COVID-19, when is the first month that you would feel comfortable travelling to the following destinations?
- Table shows % selecting each time period. Note: Summer 2020 includes July and August, plus “I have already started travelling here post-COVID”.
- Canadians are most comfortable travelling within their own province starting in the summer of 2020. One-third, meanwhile, would be willing to travel elsewhere in Canada by Fall 2020.
- Two in 10 are uncomfortable leaving their province to travel elsewhere in Canada until a vaccine is available, and more than twice that number will not consider international travel without a vaccine.

TIMING OF TRAVEL

NOVA SCOTIANS	Jul-Aug 2020*	Sep-Dec 2020	In 2021	When there is a vaccine	Don't know
Communities near you	49	12	11	15	13
Other parts of your province	49	16	11	8	15
Other parts of Canada	14	16	23	25	23
The United States	1	4	12	56	27
Other countries (outside of the United States)	1	2	13	52	33

- Nova Scotians are considerably more likely than Canadians in general to express comfort with travel to nearby communities and around their own provinces in the summer of 2020.
- Nova Scotians are more cautious than Canadians when it comes to leaving the country, with the majority stating they will wait until a vaccine is available.

CONSIDERATION OF NOVA SCOTIA

Where Respondents Live	% Considering Nova Scotia	
	Wave 1	Wave 2
Canada [NET]	23	24
Newfoundland and Labrador	43	69
Prince Edward Island	87	85
New Brunswick	64	79
Quebec	16	16
Ontario	37	37
Manitoba	14	12
Saskatchewan	8	11
Alberta	11	11
British Columbia	15	15

- You mentioned that you might feel comfortable travelling to other parts of Canada by August 2020. Which provinces or territories would you consider visiting? *Note: asked only of those willing to at least travel to other parts of Canada before September 2020.*
- Table shows % selecting Nova Scotia.
- Overall, Canadians' consideration of travel to Nova Scotia is consistent with Wave 1 results.
- The already relatively high level of consideration of Nova Scotia among residents of NL and NB has increased from Wave 1 to Wave 2.
- Approximately 4 in 10 Ontario residents would consider visiting Nova Scotia.
- Fewer than than 2 in 10 Quebec and Western Canada residents would consider visiting Nova Scotia.

ACCOMMODATIONS

	Canadians		Nova Scotians	
	Wave 1	Wave 2	Wave 1	Wave 2
Home of friends or relatives	46	45	44	50
Mid-priced hotel / motel	28	28	27	21
Luxury hotel	23	22	22	14
Camping or trailer/RV park	23	23	24	16
Own cottage or second home	23	24	25	18
Resort	22	21	19	12
Budget hotel / motel	19	19	20	17
Rented house, apartment or condominium (e.g., Airbnb)	19	20	19	14
Bed & Breakfast (B&B)	13	14	12	8
Guest ranch, farm, or lodge	11	11	11	4
Hostel, university or school dormitory	8	8	5	2

- As government restrictions related to COVID-19 are relaxed, how likely are you to stay at the following accommodation types? Table shows % definitely or very likely to stay at each type of accommodations.
- Though similar to Canadians in general in their expected accommodations use, Nova Scotians show a declining likelihood to choose nearly all types of accommodations, except staying with friends/relatives.
- In general, choice of accommodations is similar to pre-COVID-19 behaviour.

TRANSPORTATION

	Canadians		Nova Scotians	
	Wave 1	Wave 2	Wave 1	Wave 2
Domestic air travel	21	19	23	11
International air travel	21	19	14	7
Rental car	19	20	16	12
Ferry	18	18	18	14
Public transit	16	16	13	6
Taxis	14	13	16	9
Bus travel (coach, tour, shuttle, other)	12	11	9	6
Ride sharing services (e.g. Uber, Lyft)	12	11	9	3
Cruise	9	9	6	3

- As government restrictions related to COVID-19 are relaxed, how likely are you to use the following modes of transportation?
- Table shows % definitely or very likely to choose each type of paid transportation.
- Overall, Canadians' expected use of each type of paid transportation remained stable between Wave 1 and Wave 2, with relatively few indicating likelihood to use any of the various types of paid transportation.
- Nova Scotians are a notable exception, with slight to significant declines in likelihood to use most types of paid transportation.
- Nova Scotians are less likely than Canadians to use any of the various types of paid transportation, and willingness to travel by air has declined.

BUSINESS PRACTICES THAT WILL INFLUENCE PURCHASE DECISION

OFFERINGS ENCOURAGING TRAVEL

	Canadians		Nova Scotians	
	Wave 1	Wave 2	Wave 1	Wave 2
Full ticket refund	25	26	26	22
Discounted travel deal	19	17	18	8
Free cancellations	15	16	15	13
Travel insurance offer	5	5	3	2
Waived booking fees	3	2	1	1
None of the above would encourage me to make a travel booking in the near future	32	33	36	51

- Which one of the following offerings would most encourage you to make a travel booking in the near future?
- Table shows % selecting each option.
- There has been little overall change in Canadians' opinions of the various offerings.
- For Nova Scotians, there is a decreased interest in discounted travel deals, and a growing lack of interest in any offerings that might encourage them to book travel in the near future.

GENERAL PRACTICES

	Canadians		Nova Scotians	
	Wave 1	Wave 2	Wave 1	Wave 2
Businesses employing strict cleaning protocols	49	42	46	35
Businesses employing physical distancing practices	44	40	46	35
Businesses providing masks for staff	39	36	42	33
Activities that are restricted to one travel group / family	39	36	42	34
Businesses providing masks for customers	36	33	35	29
Large crowds	8	--	6	--
Activities that are booked or operated by a tour operator	--	19	--	14

- As government restrictions related to COVID-19 are relaxed, how will the following affect your interest in travelling or participating in experiences while travelling? *Note: Large crowds removed, tour operator item added for Wave 2.*
- Table shows % interested / much more interested in travelling or participating in experiences while travelling based on each situation.
- As compared to Wave 1, in Wave 2 Canadians and particularly Nova Scotians are less likely to report that these practices make them more interested in travelling or participating in experiences while travelling.

OPERATIONAL PRACTICES

- When [*dining in restaurants / travelling on a commercial airline / staying in a hotel*] in the future, what are the **most important** operational practices you think should be used? *Note: each respondent received one of these three items, selected at random. “Nationally accredited cleaning and disinfection standards” was added as an option for each item in Wave 2.*
- Canadians’ attitudes on most operator practices have not changed substantially from Wave 1 to Wave 2, with cleaning and social distancing remaining most important.
- Nova Scotians are especially likely to place importance on the following practices:
 - Restaurants: from Wave 1 to Wave 2, there has been a significant increase in the importance of enforcement of social distancing requirements, and mask-wearing (especially for employees, but also for customers), while employees wearing gloves has decreased in importance.
 - At hotels: from Wave 1 to Wave 2, there has been an increase in the importance of enforcement of social distancing requirements, while cleaning procedures remain critically important.
 - On airlines: there have been substantial increases in the importance of every operational practice, with two-thirds or more endorsing each of the practices as important.

OPERATIONAL PRACTICES: Restaurants

% Identifying the Practice as Important	Canadians		Nova Scotians	
	Wave 1	Wave 2	Wave 1	Wave 2
Provide hand sanitizer	67	72	69	73
Enforce social distancing guidelines	65	71	67	86
Required employee health screening	57	57	61	57
Cleaning/sanitizing procedures well-explained	56	55	51	51
Require employees to wear masks	55	66	60	68
Cleaning activity during your visit	55	54	52	56
Provide disinfectant wipes	53	52	60	58
Sneeze guards or other barriers	45	49	53	49
Require employees to wear gloves	40	39	46	37
Encourage customers to wear masks	33	41	33	39
Nationally accredited cleaning and disinfection standards	--	56	--	64

OPERATIONAL PRACTICES: Hotels

% Identifying the Practice as Important	Canadians		Nova Scotians	
	Wave 1	Wave 2	Wave 1	Wave 2
Guests provided with hand sanitizer, face masks, disinfectant wipes, etc.	67	67	67	73
Cleaning/sanitizing procedures well-explained	65	62	69	72
Cleaning activity visible in public areas during your hotel stay	60	58	74	73
Required employee health screening	57	58	70	66
Social distancing guidelines enforced	55	61	65	74
Sneeze guard barriers at front desk, gift shop, etc.	52	52	55	60
Require buffets replaced by room service or grab-and-go options	44	44	39	54
Floor markings for social distancing	42	44	42	56
Contact-less check-in (app based, no human contact)	38	39	40	41
Smartphone-based mobile room keys	29	29	31	32
Nationally accredited cleaning and disinfection standards	--	59	--	72

OPERATIONAL PRACTICES: Airlines

% Identifying the Practice as Important	Canadians		Nova Scotians	
	Wave 1	Wave 2	Wave 1	Wave 2
Passengers provided with hand sanitizers, face masks, disinfectant wipes, etc.	70	69	68	86
High-tech cleaning of plane's interior between flights	69	65	66	74
Passenger health screening (temperature checks, screening for COVID-19 symptoms)	68	68	73	83
Health screening required for flight crew	62	63	63	75
Social distancing enforced in the boarding area	60	63	72	80
Empty middle seat policy	59	60	64	75
Plane bathroom cleaned after each use	57	58	54	75
Flight crew required to wear masks and gloves	56	59	55	68
Sneeze guards barriers between seats	42	43	56	64
Nationally accredited cleaning and disinfection standards	--	60	--	76