

The background of the entire slide is a top-down view of various travel-related items on a brown, textured surface that looks like an old map. The items include a silver and black camera with a lens cap removed, a lens cap, a magnifying glass, an open notebook with a pencil resting on it, a pair of black-rimmed glasses, and several small printed photos or postcards. The lighting is soft and focused on the central items.

TOURISM IN NORTH AMERICA:

ASSESSING THE IMPACT OF COVID-19 ON
CURRENT AND FUTURE TRAVEL

Results presented by Leger
August 6th, 2020

Methodology



Web survey using computer-assisted Web interviewing (CAWI) technology



From **June 9th to 21st, 2020**



2,031 Canadians and 1,001 Americans 18 years of age or older, randomly recruited



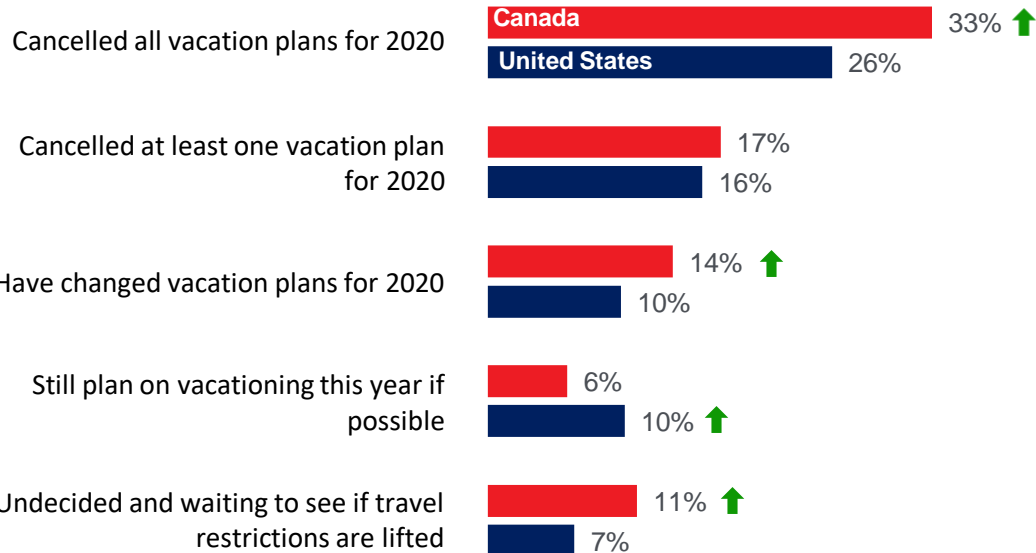
No margin of error can be associated with a non-probability sample (Web panel in this case). However, for comparative purposes, a probability sample of 3,032 respondents would have a margin of error of $\pm 2.51\%$, 19 times out of 20.

Impact of COVID-19 on 2020 Travel Plans

Shifts in 2020 Travel Plans

Q. Have you changed travel plans in 2020 due to the COVID-19 pandemic? (Base Canada n=1998; U.S. n=976)

Note: Does not show those who did not have travel plans.

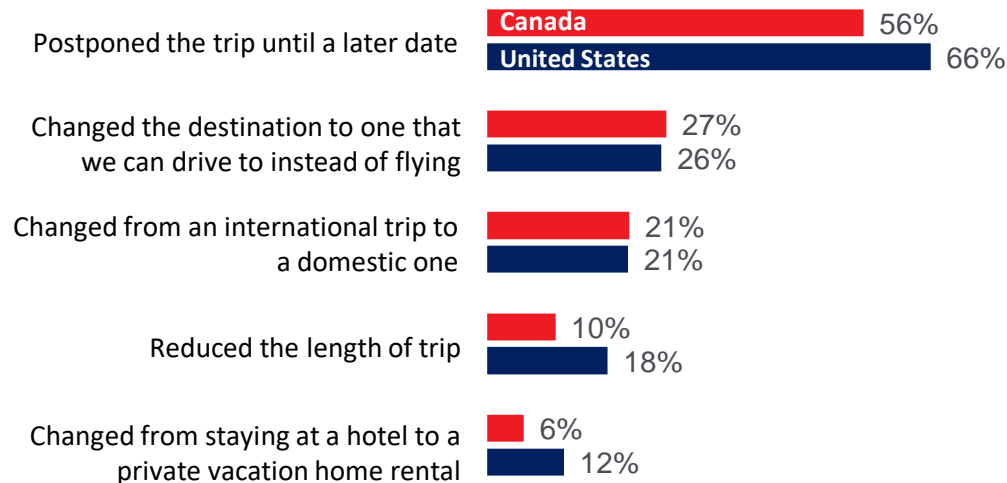


Q. How have your travel plans changed? (only asked if respondents noted they have changed their travel plans on previous slide. (Base Canada n=286; U.S. n=97)

65% OF CANADIANS HAVE CANCELLED OR CHANGED TRAVEL PLANS IN 2020 AS A DIRECT RESULT OF COVID-19 COMPARED TO 52% OF AMERICANS.

Two-thirds of Travellers have Postponed Their Vacations

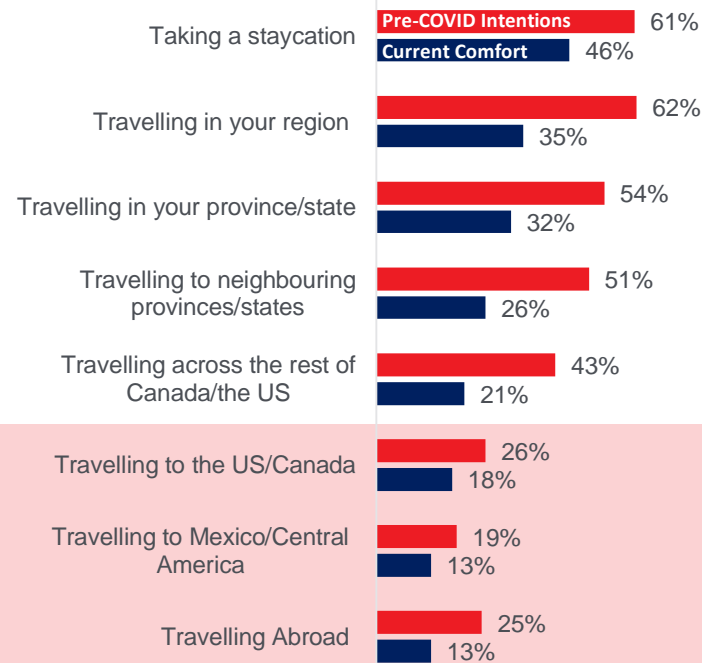
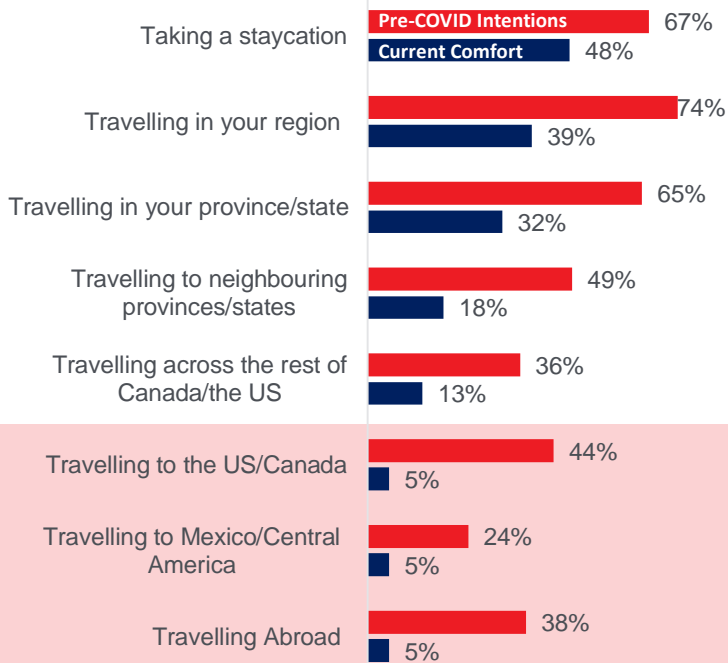
41% OF CANADIANS AND 39% OF AMERICANS HAVE CHANGED THEIR TRIP TO A DOMESTIC VACATION THAT THEY CAN DRIVE TO.



Current Attitudes and Comfort

Travel Intentions: Destinations

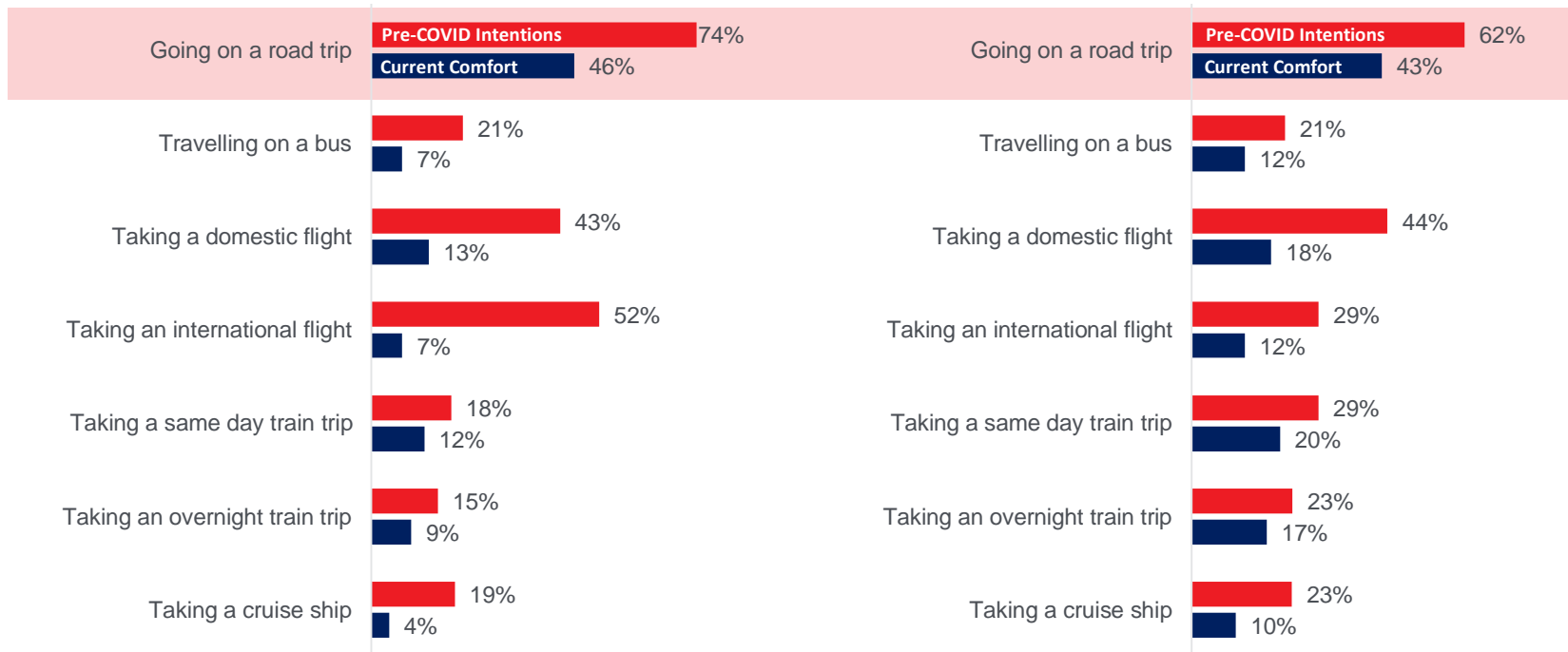
Q. If the COVID-19 pandemic had not occurred, how likely would you have been to consider traveling to each of the following **domestic destinations** this year? (Base Canada n=2019-227; U.S. n=989-995); Once the governments lift the protective measures put in place to fight COVID-19, when do you think you will be comfortable traveling...? (Base Canada n=1891-1971; U.S. n=848-926)



Note: Pre-COVID intentions are scored on a 1 (extremely unlikely; 5 extremely likely) scale. Scores shown are 4-5/5 likelihood scores.

Travel Intentions: Transportation

Q. If the COVID-19 pandemic had not occurred, how likely would you have been to consider each of the following **vacations** this year? (Base Canada n=2019-2027; U.S. n=989-995); Once the governments lift the protective measures put in place to fight COVID-19, when do you think you will be comfortable taking your next...? (Base Canada n=1851-1927; U.S. n=890-921)

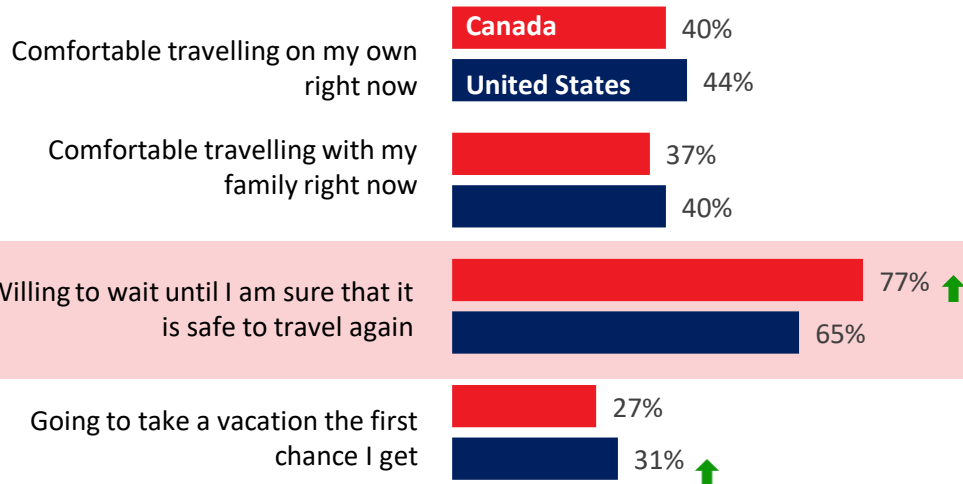


Note: Pre-COVID intentions are scored on a 1 (extremely unlikely; 5 extremely likely) scale. Scores shown are 4-5/5 likelihood scores.

Approach to Travel Moving Forward

Q. When thinking about **how you will approach** travel and tourism following the COVID-19 pandemic, how much do you agree with each of the following statements (Base Canada n=1974-2019; U.S. n=961-995)

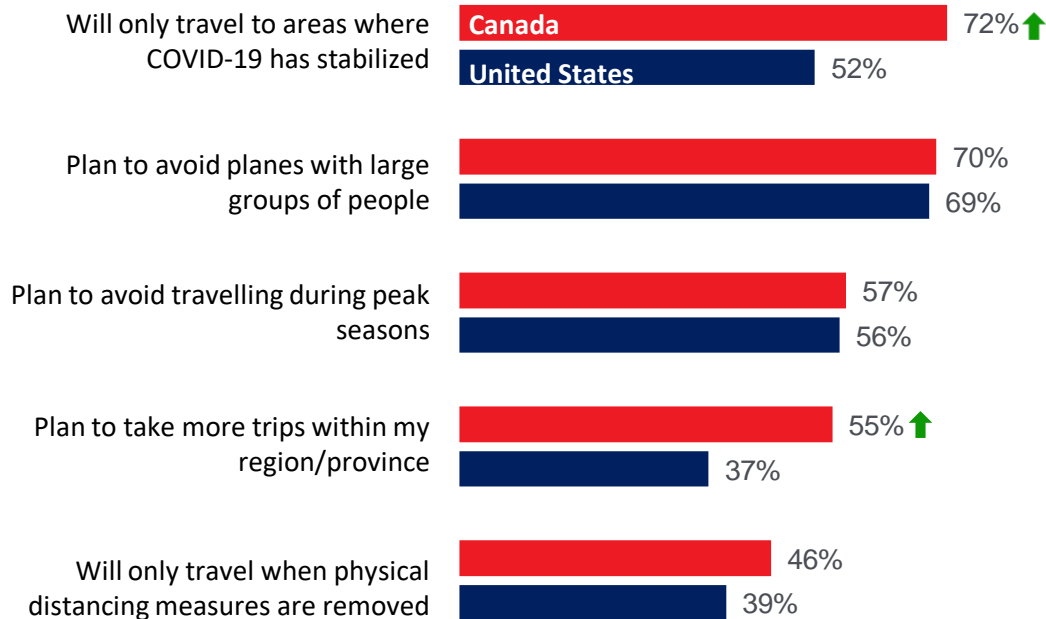
73% OF CANADIANS AND 65% OF AMERICANS ARE LOOKING FORWARD TO BEING ABLE TO TRAVEL AGAIN.



Changing How We Travel

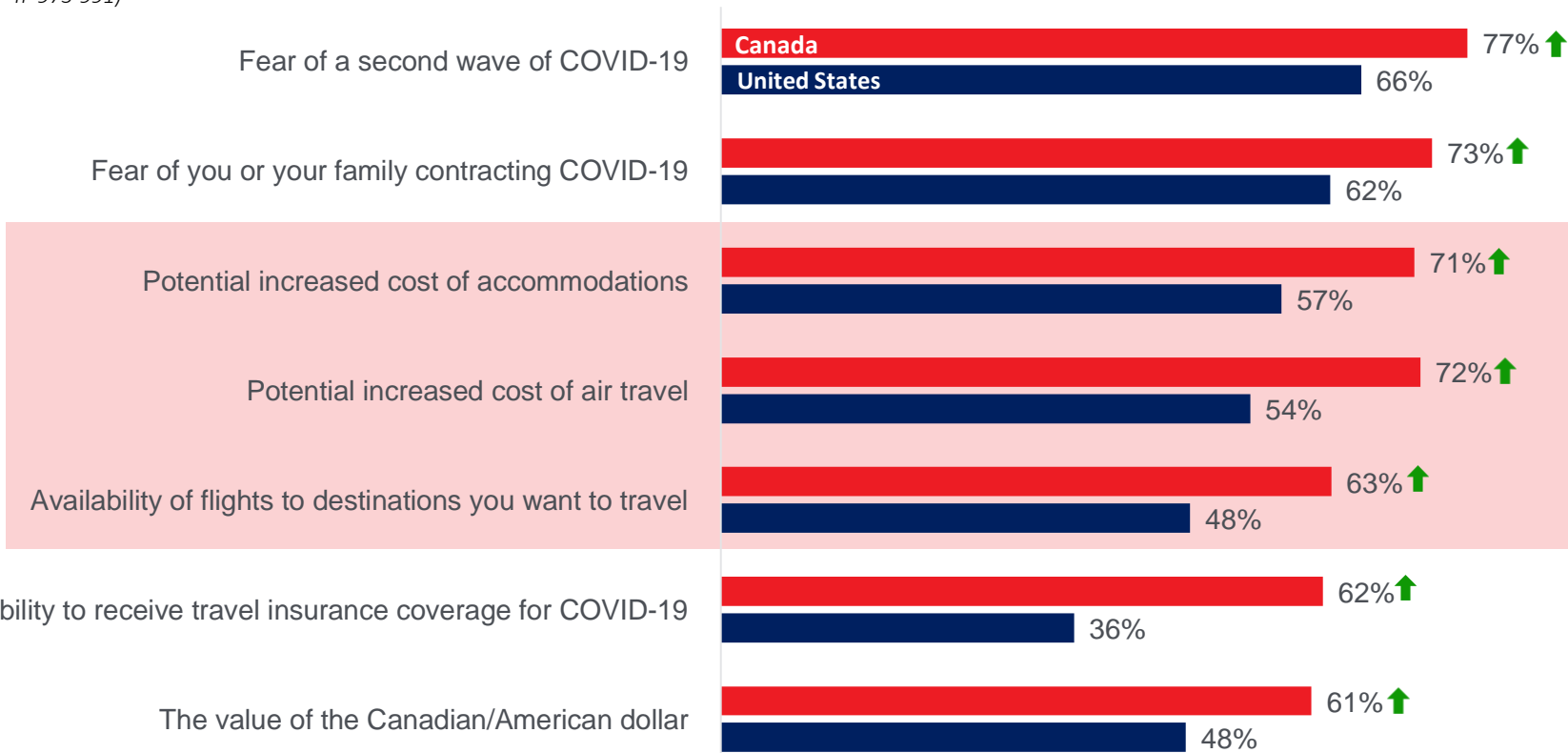
Q. When thinking about **how you will approach** travel and tourism following the COVID-19 pandemic, how much do you agree with each of the following statements. (Base Canada n=1974-2019; U.S. n=961-995)

75% OF CANADIANS INTEND TO CHANGE HOW THEY TRAVEL FOLLOWING THE COVID-19 PANDEMIC COMPARED TO **68% OF AMERICANS.**



Impacting Future Travel Plans

Q. Thinking about future travel in the next **12 months**, how much will each of the following impact your decision to travel: (Base Canada n=1988-2021; U.S. n=973-991)

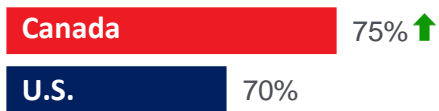


Note: Pre-COVID intentions are scored on a 1 (no impact at all; 5 extreme impact) scale. Scores shown are 4-5/5 impact scores.

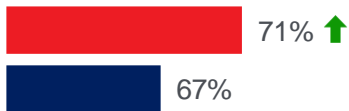
Top 3 Factors When Selecting a Future Travel Experience

Q. When thinking about future travel experiences, how important are each of the following factors when deciding on a vacation destination? Please select all that apply. (Base Canada n=1988-2019; U.S. n=964-988)

Clear communication of measures put in place to protect you from COVID-19



Area is designated as being free from COVID-19



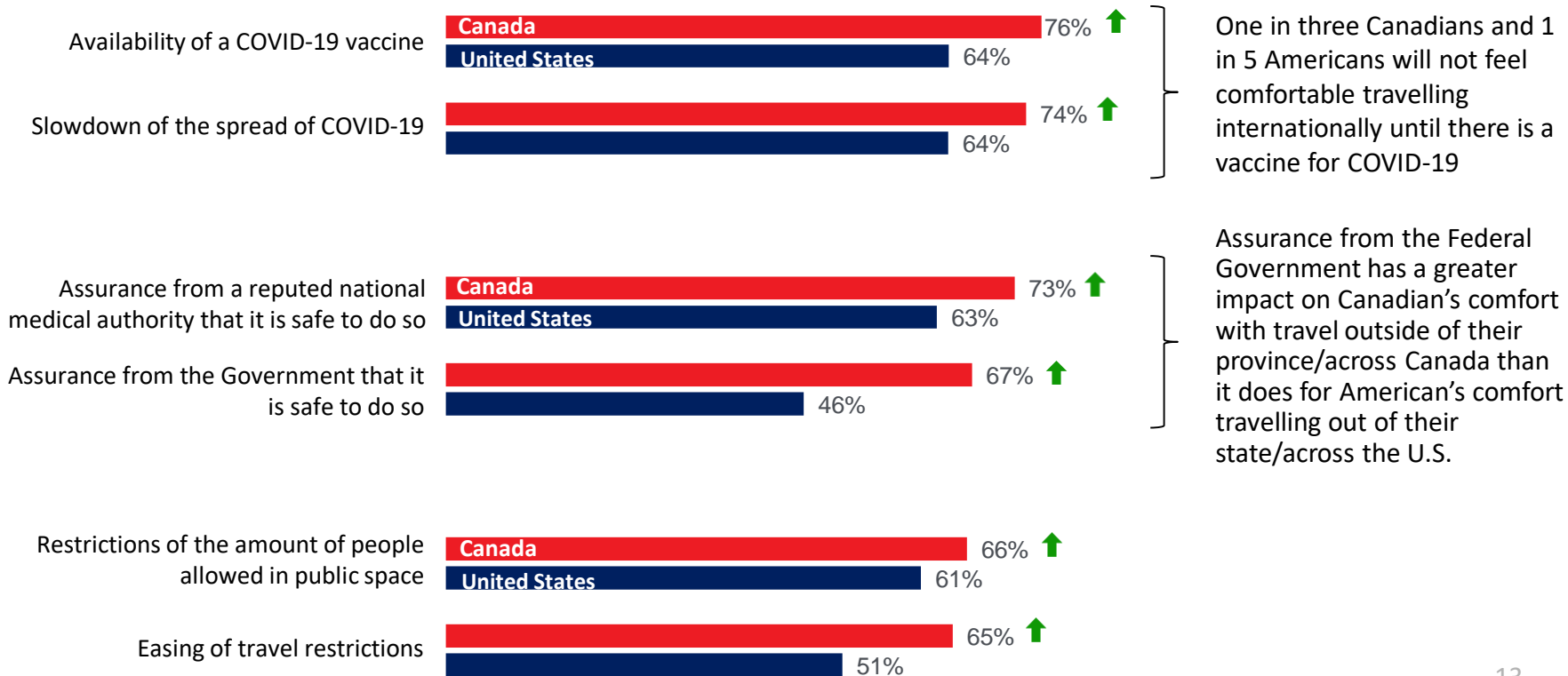
Ability to avoid large crowds and gatherings



Note: Pre-COVID intentions are scored on a 1 (not important at all; 5 extremely important) scale. Scores shown are 4-5/5 importance scores.

Improving Comfort Levels Following COVID-19

Q. To what extent would each of the following impact your level of comfort when traveling again? (Base Canada n=1641-1667; U.S. n=726-746)



Note: Pre-COVID intentions are scored on a 1 (no impact at all; 5 extreme impact) scale. Scores shown are 4-5/5 impact scores.

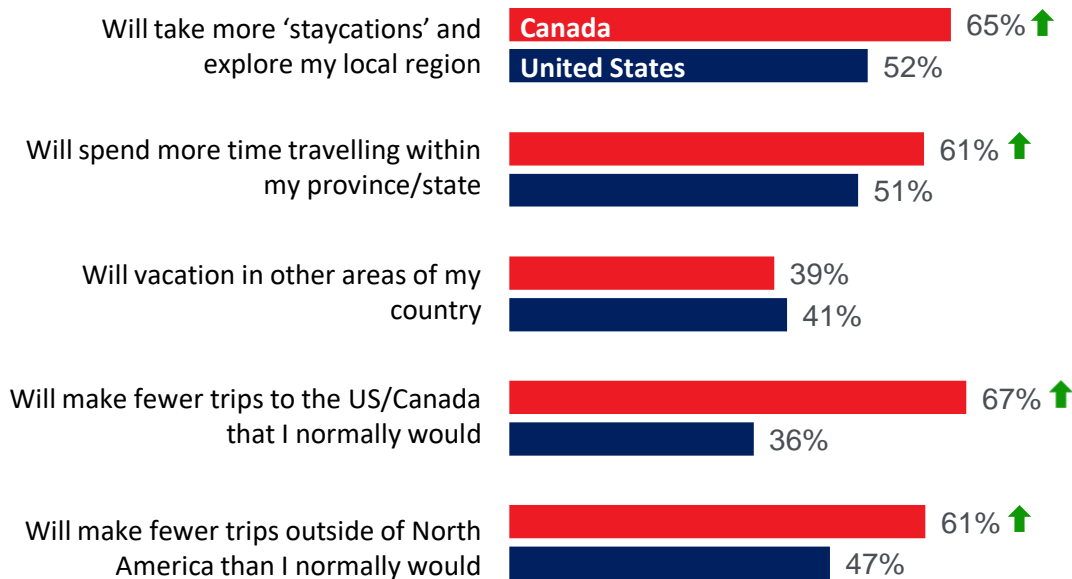
The background of the slide is a map of the United States, overlaid with a semi-transparent dark gray filter. Numerous red pushpins are scattered across the map, primarily concentrated in the eastern and central regions, suggesting travel destinations or points of interest.

Future Travel: Trip Type and Attractions

Travel Intentions in the Next 12 Months

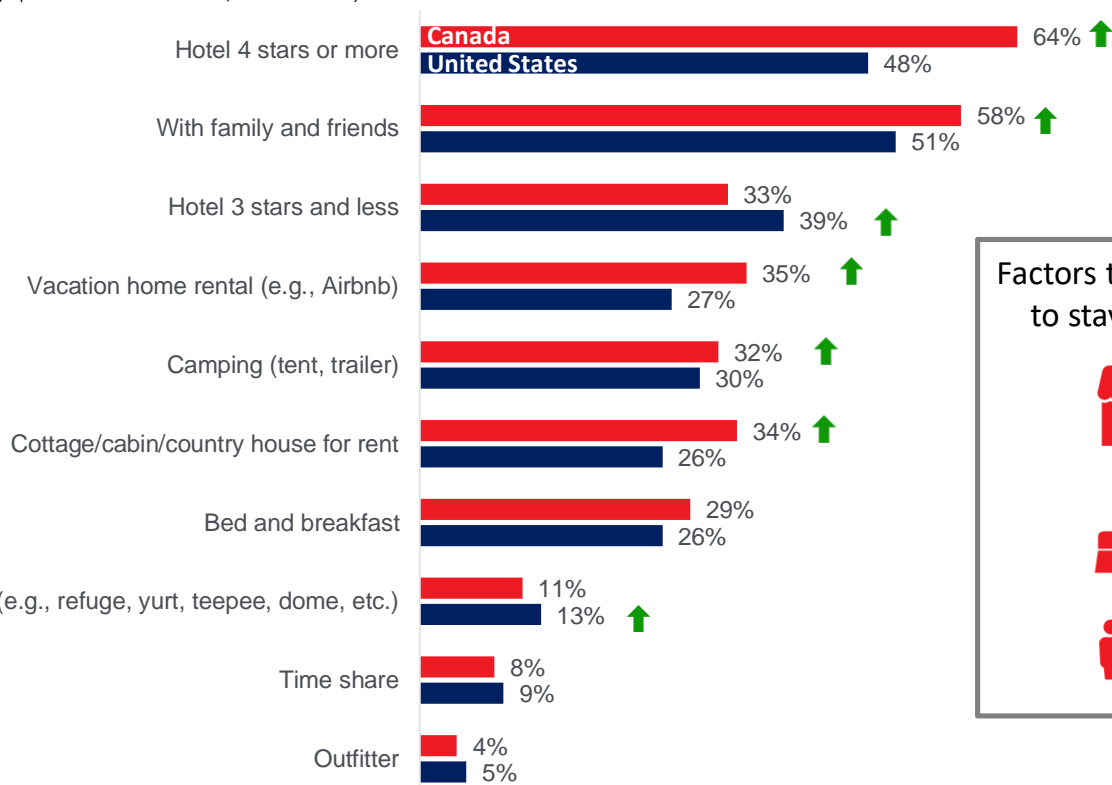
Q. When thinking about travel in the next **12 months**, how much do you agree with each of the following statements
 (Base Canada n=2004-2021; U.S. n=964-991)

73% OF CANADIANS PLAN TO TAKE FEWER INTERNATIONAL TRIPS COMPARED TO **52% OF AMERICANS.**



Future Travel: Accommodations

Q. When considering future travel (e.g., when governments say that it is safe to do so again), what type(s) of accommodations will you consider? Please select all that apply. (Base Canada n=2031; U.S. n=1001)



Factors that would increase willingness to stay in a hotel for a 'staycation':



Affordability



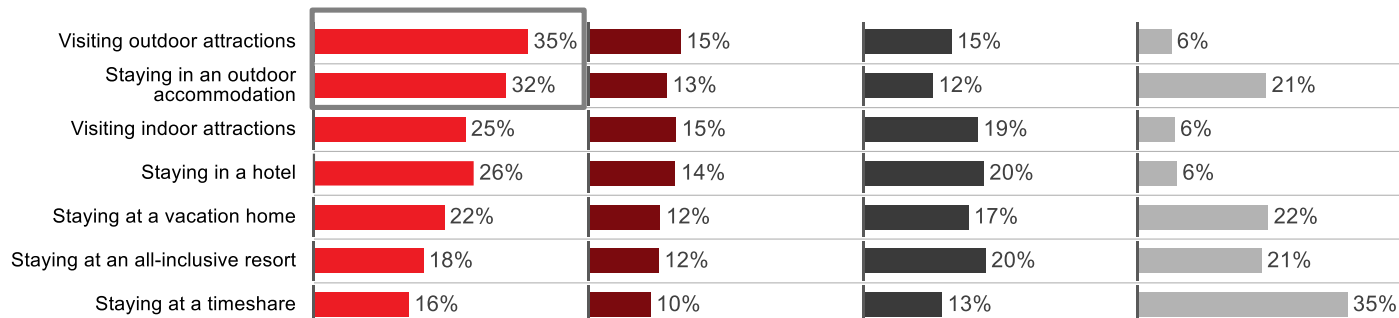
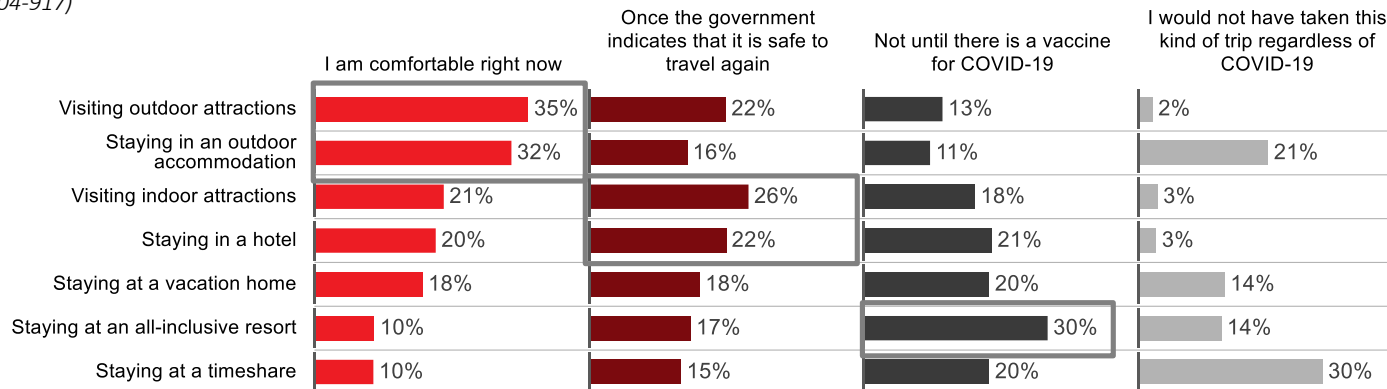
Cleaning and Sanitization



COVID-19 regulations in place

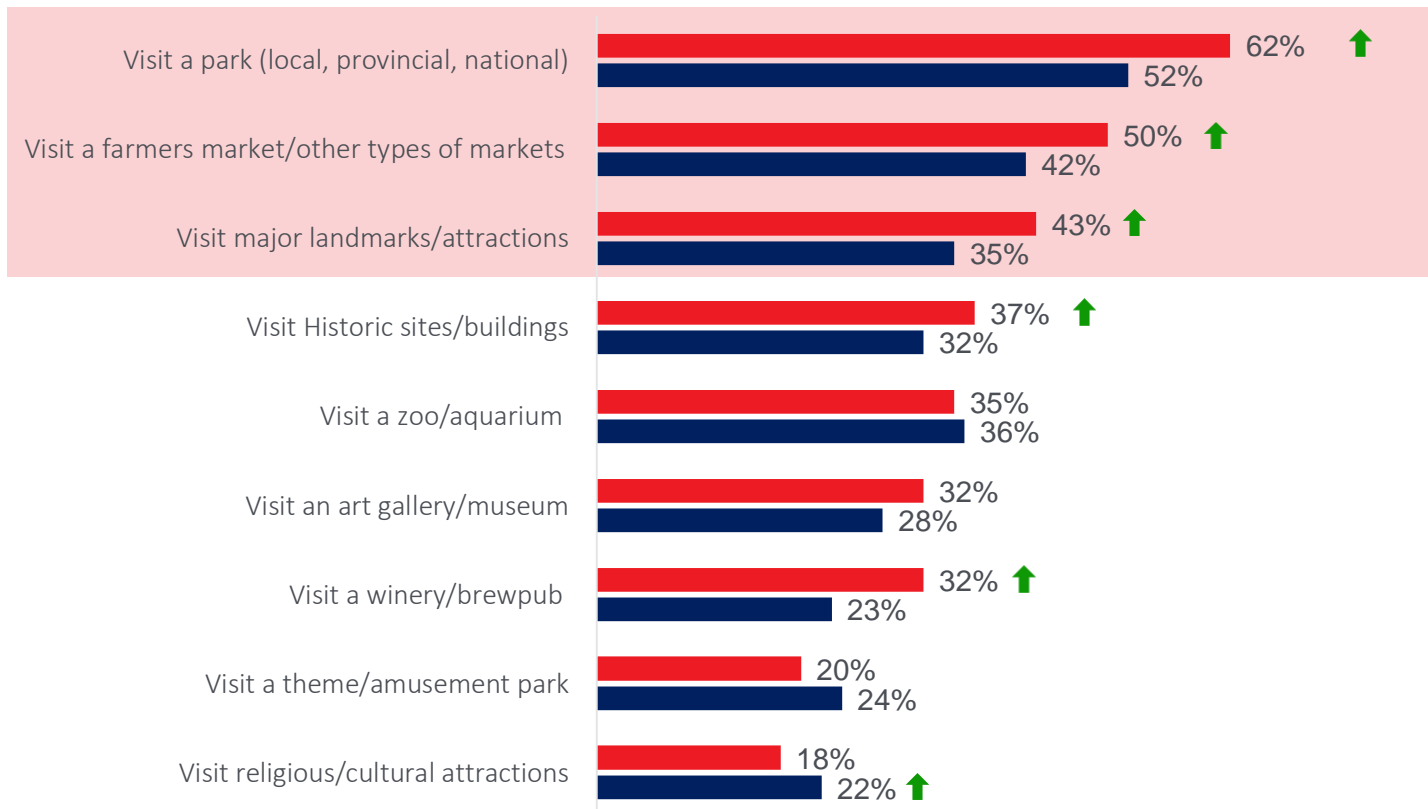
Future Travel: Trip Type

Q. Once the governments lift the protective measures put in place to fight COVID-19, when do you think you will be comfortable with each of the following?
 (Base Canada n=1894-1961; U.S. n=904-917)



Future Travel: Attractions

Q. Thinking about future travel experiences once the governments lift the protective measures put in place to fight COVID-19, which of the following **types of attractions** are you most likely to consider visiting in the coming year? Please select all that apply. (Base Canada n=2031; U.S. n=1001)



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