

# 2020 Global Tourism Watch Highlights Report

Atlantic Provinces  
November 2020

Publishing date: October 2021

Fogo Island  
Newfoundland & Labrador

**CANADA**   
FOR  
GLOWING  
HEARTS

Canada

 **DESTINATION  
CANADA**

## Study Overview:

As a result of the COVID-19 pandemic in 2020 and the renewed focus on domestic travel, the Canada study was conducted among the general population (excluding residents of the Northern Territories). A total of 9,059 Canadians participated.



### GTW Provincial Sample Distribution:

British Columbia Residents:	1,500
Alberta Residents:	1,500
Saskatchewan Residents:	500
Manitoba Residents:	500
Ontario Residents:	2,101
Quebec Residents:	1,507
New Brunswick Residents:	400
Nova Scotia Residents:	400
Prince Edward Island Residents:	250
Newfoundland & Labrador Residents:	401

At the provincial level, respondents are split into two groups based on their travel behaviour:

**Domestic Out-of-Province Travellers:** Canadian residents aged 18 years and older, who have taken a pleasure trip in Canada beyond their own province where they had stayed at least 2 nights with a minimum of 1 night in paid accommodation in the past 3 years, or plan to take such a trip in the next year. These respondents evaluated destinations outside of their province.

**In-Province:** Canadian residents aged 18 years and older, who evaluated destinations within their province of residence.

## Context:

It is important to consider the results based in light of the COVID-19 situation at the time of data collection. In November 2020, no vaccine was approved for use and Canada was at the start of its 2<sup>nd</sup> wave of COVID-19. Between July-November 2020, there was an Atlantic Bubble which allowed unrestricted travel within the region for residents of the four Atlantic provinces. This agreement was suspended in November 2020 in an effort to contain the pandemic. Non-essential travel within Canada and beyond the country was discouraged. The Canada/US border had been closed since March 2020.

For additional context around the current COVID-19 situation in Canada, please refer to Destination Canada's [COVID-19 Research page](#), which includes information on resident sentiment, travel related measures, impact and recovery, and forecasting.



Timing of Fieldwork:

Nov 2020

This report contains a summary of key metrics about residents of Atlantic Canada.

Results are presented for three main groups:

- Total residents: Results among the total sample of Atlantic Canada residents (n=1,451)
- Out-of-province: Results among out-of-province travellers in Atlantic Canada who evaluated destinations outside of their province (n=725)
- In-province: Results among residents of Atlantic Canada who evaluated destinations within their province (n=726)

Charts are colour coded to show the results among each group:

### Legend:

Total Residents

Out-of-Province Travellers

Residents evaluating in-province destinations

# KEY HIGHLIGHTS

## Key Highlights – Atlantic Provinces

Insight	Implication
<p><b>There is pent up demand for travel</b>, but enthusiasm is lower among Atlantic Canadians, who are more concerned about health and safety in a potential destination than other Canadian residents.</p>	<p><i>Illustrating that health and safety measures are in place and a destination is safe to visit are key messages that need to be communicated to encourage Atlantic Canadians to travel within their province and to other Canadian provinces and territories in 2021.</i></p>
<p><b>Atlantic Canadians are among the least likely of all Canadian residents to report that they feel safe travelling now.</b></p>	<p><i>It may be challenging to convince Atlantic Canadians to travel in 2021.</i></p>
<p><b>There is a small group of Atlantic Canadians who feel safe travelling now.</b> This group is more likely to have travelled since the start of the pandemic and more likely to be comfortable flying domestically. Despite saying they feel safe to travel, health risks top the list of travel barriers for this group, followed by cost.</p>	<p><i>Combining safety messaging with travel deals and illustrating the value of a vacation, either within their province or to other Canadian provinces and territories, may motivate this group of Atlantic Canadians to travel more in 2021.</i></p>
<p><b>Leisure trips and visiting family and friends will drive Atlantic Canadians' travel in 2021.</b> Atlantic Canadians are the most likely of all Canadian residents to travel out-of-province to visit family and friends.</p>	<p><i>There is a good opportunity to reach potential Atlantic Canadian travellers by encouraging travel to visit family and friends in other Canadian provinces and territories, in addition to marketing leisure trip itineraries.</i></p>
<p><b>Even when travelling out-of-province, Atlantic Canadians are following a Canada-wide trend of staying closer to home:</b> most travel in 2021 will likely be within the Atlantic region.</p>	<p><i>The Atlantic region has the most to gain from the Atlantic Canada market.</i></p>
<p><b>There are mixed opinions on city travel.</b> For out-of-province travel, there is considerable interest in visiting cities (e.g. Halifax, Charlottetown, Toronto, St. John's) but also more rural destinations such as Cape Breton. For in-province travel, there is a greater appetite for trips to destinations outside of major cities.</p>	<p><i>There is an opportunity for both cities and rural destinations, particularly those in Atlantic Canada, to attract visitors from across Atlantic Canada. Smaller destinations in Atlantic Canada may also find a good opportunity with the in-province resident markets.</i></p>
<p><b>Trips to familiar destinations with limited interactions are favoured.</b> Atlantic Canadians are most interested in taking trips where activities and social interactions are limited. They are also more open to re-visiting familiar destinations than travelling to new destinations.</p>	<p><i>There is a greater opportunity to resonate with potential Atlantic Canadian travellers by highlighting uncrowded yet familiar destinations.</i></p>
<p><b>Trying local food and drink and visiting breweries and wineries are more popular among Atlantic Canadians than among most other Canadian residents.</b> Atlantic Canadians are also outdoors focused, with COVID-19 likely enhancing the popularity of outdoor activities such as hiking/walking in nature, natural attractions, and nature parks.</p>	<p><i>Communicating the availability of opportunities to try local food and drink and participate in outdoor activities in uncrowded settings will capture the attention of potential travellers.</i></p>
<p><b>Younger Atlantic Canadians (under 35 years) are eager to resume travelling.</b> They are less concerned about health and safety and have the strongest intent to travel both within their province and to other parts of Canada.</p>	<p><i>Younger Atlantic Canadians (under 35 years) represent the best immediate opportunity for operators in Atlantic Canada as well as those in other provinces and territories.</i></p>
<p><b>Older Atlantic Canadians (55+ years) are more hesitant to travel in the near future.</b> Much of their hesitancy is related to health and safety concerns.</p>	<p><i>Clearly illustrating in communications that health and safety measures are being followed and that a destination is safe is particularly important for attracting older Atlantic Canadians (55+ years).</i></p>

# DOMESTIC TRAVEL INTENT AND CONSIDERATION

## Key Insights:

- As seen with residents across Canada, the COVID-19 pandemic has severely impacted Atlantic Canadian residents' plans to travel in 2021.
- Relative to the Canadian average, the outlook for in-province travel in the Atlantic provinces is above average, while the out-of-province outlook is lower than the Canadian average.
- With Atlantic Canadian residents following a Canada-wide trend for staying closer to home, **the Atlantic provinces stand to benefit the most from the Atlantic Canada outbound market.**

## Vacation Outlook – Next Year vs. Past Year (% spending more time minus % spending less time)

Staying at home	<b>+30</b>
Travelling within your province	<b>+13</b>
Travelling outside of your province, but within Canada	<b>-43</b>
Travelling outside of Canada	<b>-67</b>



Total Residents (n=1451)

## Likelihood of Travelling within Canada – Next Year

### Out-of-Province Travel

Immediate Potential  
(Any trip length within Canada  
outside of own province)



Out-of-Province Travellers (n=725)

Market Size Potential  
(Out-of-Province Travellers  
considering visiting each region)

British Columbia	<b>251,500</b>
Alberta	<b>225,000</b>
Saskatchewan/Manitoba	<b>72,500</b>
Ontario	<b>404,000</b>
Quebec	<b>244,500</b>
Atlantic North	<b>1.62 M</b> <b>54,000</b>

Prince Edward Island	<b>547,500</b>
Nova Scotia	<b>444,000</b>
New Brunswick	<b>341,000</b>
Newfoundland	<b>292,000</b>



### In-Province Travel

Immediate Potential  
(Any trip length within province)



Residents evaluating in-province destinations (n=726)

# DOMESTIC TRAVEL INTENT AND CONSIDERATION (CONT.)

## Key Insights:

- Atlantic Canadian residents are most likely to travel inter-provincially within the Atlantic region. The provinces most likely to be under consideration for a visit in the next year are Nova Scotia and Prince Edward Island, with Charlottetown and Halifax being the most popular destinations. ***The Atlantic provinces stand to benefit the most from the Atlantic Canada outbound market.***
- Ontario is the top province under consideration outside of Atlantic Canada, and Toronto is the only top-5 destination outside of Atlantic Canada. ***Outside of the Atlantic region, Ontario has the best opportunity to reach the Atlantic Canada market.***
- Destinations other than major cities are most popular for in-province travel within the Atlantic region. ***There is an opportunity for smaller destinations in Atlantic Canada to capitalize on the in-province markets.***

## Destinations Seriously Considering – Next Year

### Out-of-Province Travel – Top 3 Provinces



### Top 5 Destinations



Out-of-Province Travellers (n=725)

### In-Province Travel – Top 2 Destinations

Prince Edward Island		Nova Scotia	
Points East Coastal Dr.	<b>38%</b>	Cape Breton	<b>42%</b>
North Cape Coastal Dr.	<b>36%</b>	Annapolis Valley	<b>39%</b>
New Brunswick		Newfoundland	
Bay of Fundy area	<b>44%</b>	Western region	<b>53%</b>
Moncton area	<b>42%</b>	Central region	<b>48%</b>

Residents evaluating in-province destinations (n=125/n=200/n=200/n=201)

## Most Appealing Destinations / Destination Knowledge

### Out-of-Province Travel – Top 3 Appealing Provinces

	Nova Scotia	Ontario	Prince Edward Island
Most Appealing	<b>23%</b>	<b>15%</b>	<b>14%</b>
Knowledge (excellent/very good)	<b>58%</b>	<b>41%</b>	<b>48%</b>

### Top 3 Appealing Destinations

	Halifax	Charlottetown	St. John's
Most Appealing	<b>16%</b>	<b>12%</b>	<b>10%</b>
Knowledge (excellent/very good)	<b>70%</b>	<b>44%</b>	<b>32%</b>

Out-of-Province Travellers planning to travel within Canada in next year (n=612/n=578)

### In-Province Travel – Most Appealing Destination

	Most Appealing	Knowledge (excellent/very good)
Bay of Fundy area (NB)	<b>40%</b>	<b>40%</b>
Western region (NFLD)	<b>36%</b>	<b>40%</b>
Cape Breton (NS)	<b>32%</b>	<b>33%</b>
Points East Coastal Drive (PEI)	<b>27%</b>	<b>36%</b>



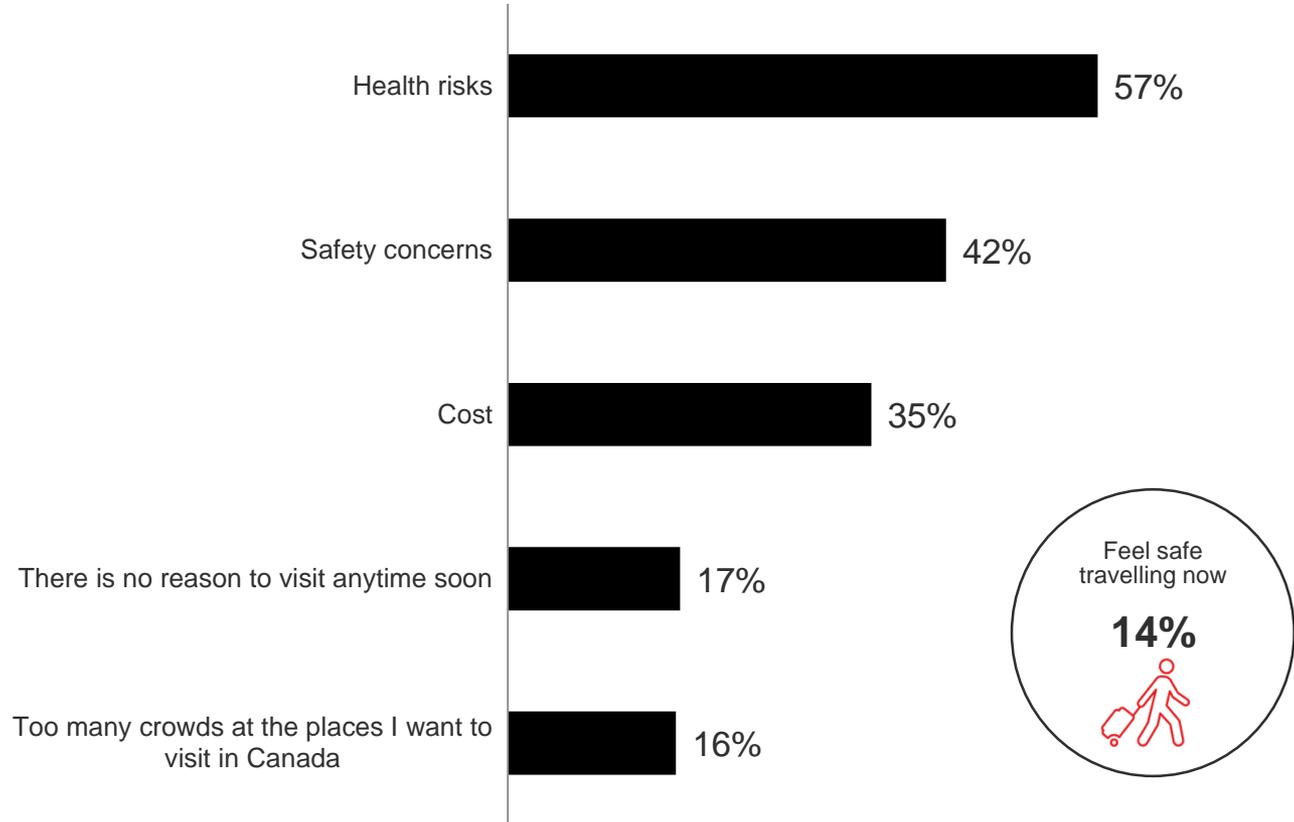
Residents evaluating in-province destinations planning to travel within Canada in next year (n=160/n=162/n=155/n=84)

# BARRIERS TO TRAVEL WITHIN CANADA

## Key Insights:

- Health risks are the top barrier to travel within Canada. Relative to the Canadian average, Atlantic Canadians are more worried about health risks and safety concerns. Concerns about health risks increase with age and may be linked to the availability of a vaccine for COVID-19 (as this study was fielded in November 2020). As more Atlantic Canadians are vaccinated, health risks may decline as a barrier to travel. ***Demonstrating that health and safety measures are in place and a destination is safe to visit are key messages that need to be communicated to encourage Atlantic Canadians to travel within their own province and to other Canadian provinces and territories.***
- Just 14% of Atlantic Canadians feel safe travelling now, which is below the national average. This small group is more likely to have travelled during the pandemic and more likely to say they are comfortable flying domestically. Health risks are still the top barrier for this group, followed by cost, so ***travel deals coupled with safety messaging could motivate those already comfortable with travelling to take more trips.***

## Top 5 Barriers to Travel



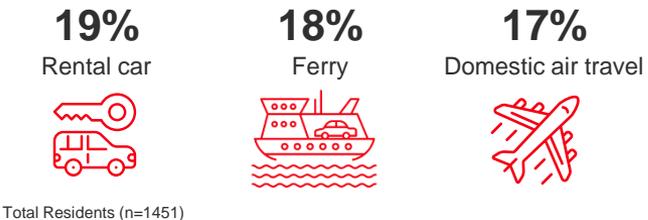
Total Residents (n=1451)

# COVID-19 CONSIDERATIONS

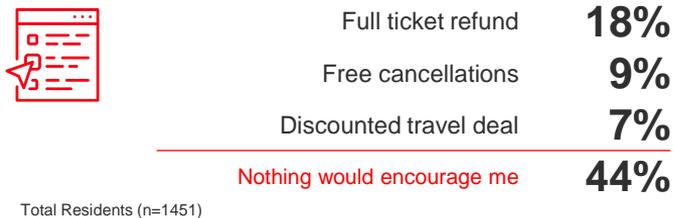
## Key Insights:

- Atlantic Canadians are divided in their eagerness to travel, with just over half saying they can't wait to travel again – the lowest levels in Canada.
- Atlantic Canadians are most interested in taking trips where activities and social interactions are limited, and with more outdoor-based activities and attractions. They are more open to re-visiting familiar destinations than travelling to new destinations. **There is a greater opportunity to resonate with potential Atlantic Canadian travellers by highlighting outdoor activities at uncrowded and familiar destinations.**
- Atlantic Canadians are less receptive to travel incentives than other Canadian residents. **Among those who are receptive, flexibility is key.**
- When choosing a destination, health and safety measures and COVID-19 case counts are the most important considerations for potential travellers. Quarantine requirements are also more of a consideration in Atlantic Canada than in other regions. **To reassure potential travellers, it is important to communicate that health and safety protocols are in place and to monitor and communicate quarantine requirements.**

## Transportation Mode Likely to Use – Top 3



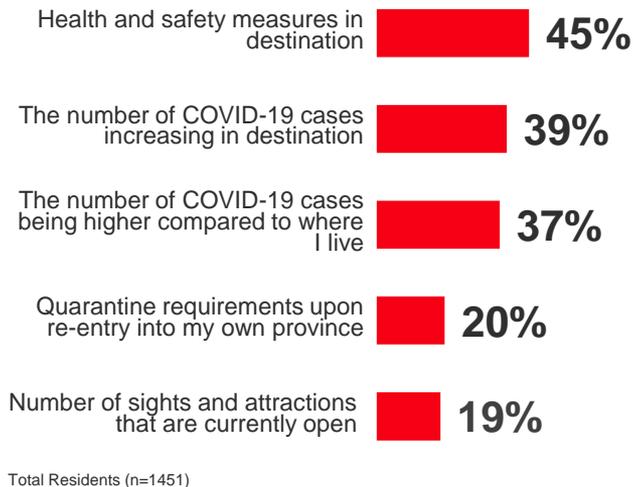
## Incentives to Book in the Near Future – Top 3



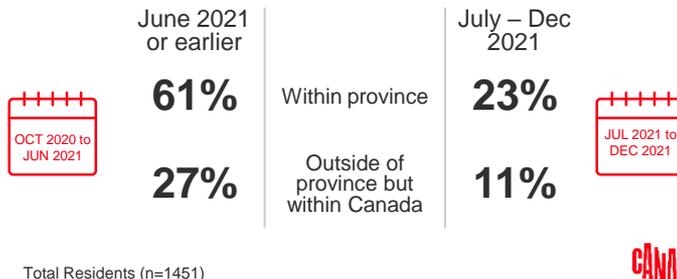
## Attitudes Towards Travel – Top2Box



## COVID Specific Factors to Consider when Selecting Destination – Top 5



## First Time Comfortable Travelling



# KEY CHARACTERISTICS OF NEXT CANADA TRIP

## Key Insights:

- Travelling for vacation purposes and visiting family and friends will drive travel in 2021. Relative to the Canadian average, in the Atlantic region out-of-province travel is more likely to be motivated by VFR. **There is a good opportunity to reach potential Atlantic Canadian travellers by encouraging travel to visit family and friends in other Canadian provinces and territories, in addition to marketing leisure trip itineraries.**
- In the next year, domestic travel parties will be largely be made up of immediate family. **Couples and families represent the greatest potential markets for in-province and out-of-province travel, while travel with friends could be an additional potential audience for in-province travel.**
- Relative to the Canadian average, Atlantic Canadians are more likely to stay with friends and family when travelling, **which could indicate a greater challenge to encourage stays in paid accommodations.**

## Trip Purpose

### Out-of-Province Travel



Out-of-Province Travellers answering (n=626)

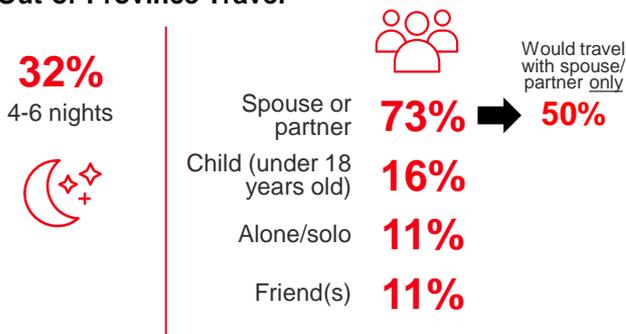
### In-Province Travel



Residents evaluating in-province destinations answering (n=564)

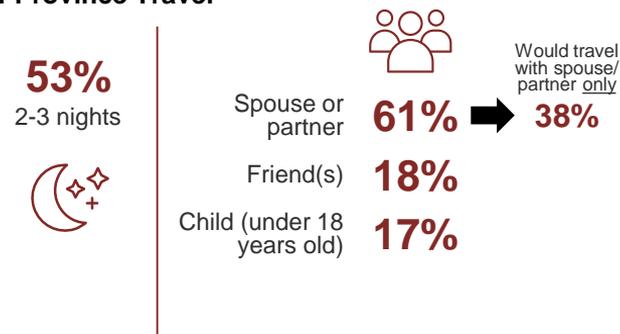
## Trip Length – Top 1 / Travel Party – Top 3 / Accommodation – Top 3

### Out-of-Province Travel



Out-of-Province Travellers answering (n=626)

### In-Province Travel



Residents evaluating in-province destinations answering (n=564)

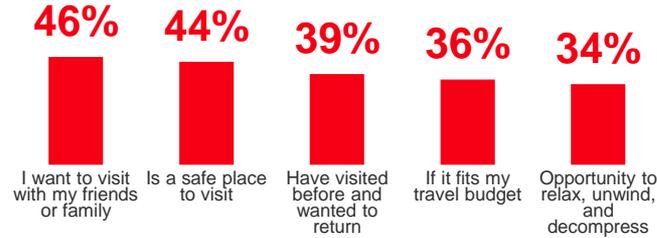
# KEY CHARACTERISTICS OF NEXT CANADA TRIP (CONT.)

## Key Insights:

- Visiting friends and family, destination safety and relaxation are the top factors Atlantic Canadians consider when choosing a destination. **Communicating that travellers can safely relax and reconnect with family and friends with health and safety measures in place will help to reassure potential visitors.**
- Trying local food and drink is a top draw for Atlantic Canadians, and out-of-province travellers express a stronger interest in breweries and wineries than residents of most other provinces. Atlantic Canadians are also drawn to outdoor activities and natural attractions, both as a vacation activity and to anchor a trip around. **Atlantic Canada represents a good potential market for operators offering opportunities to sample local food and drink as well as outdoor-based itineraries.**

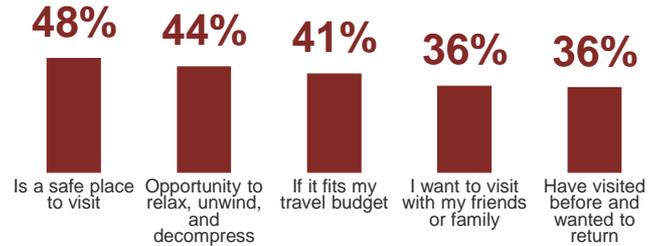
## Destination Selection Factors – Top 5

### Out-of-Province Travel



Out-of-Province Travellers answering (n=626)

### In-Province Travel



Residents evaluating in-province destinations answering (n=564)

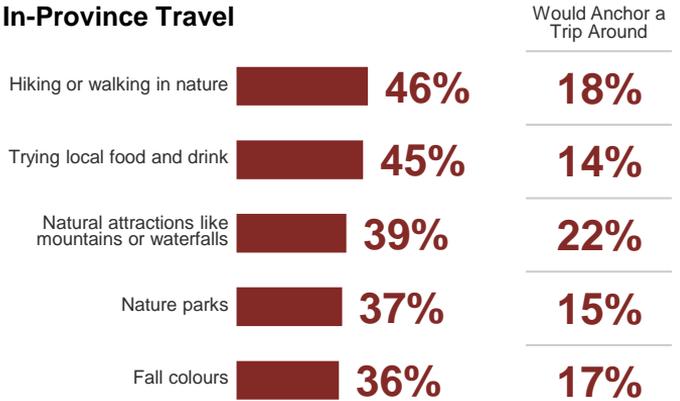
## Vacation Activities – Top 5

### Out-of-Province Travel



Out-of-Province Travellers answering (n=626/n=698)

### In-Province Travel



Residents evaluating in-province destinations answering (n=564/n=674)

# BOOKING

## Key Insights:

- Compared to other Canadian residents, Atlantic Canadians are less likely to work with a travel agent for booking accommodation on domestic trips, preferring to book directly with an establishment. Still, roughly one-third say they would book their accommodation through a travel agent.
- When deciding to work with a travel agent for any part of the trip planning process, Atlantic Canadians are typically looking for a good deal, to reduce the hassle of booking, expert knowledge, or assistance in case of trip interruptions. **The greatest opportunity for travel agents to engage with potential travellers in Atlantic Canada is by highlighting those offerings at the booking stage.**

## Accommodation Booking – Top 3

### Out-of-Province Travel



Out-of-Province Travellers answering (n=626)

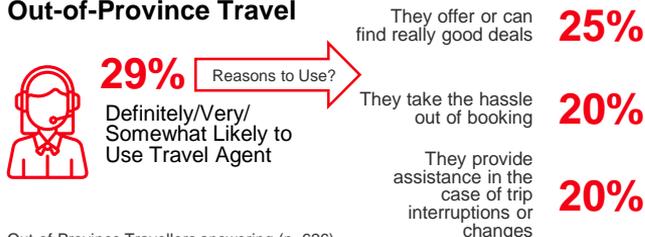
### In-Province Travel



Residents evaluating in-province destinations answering (n=564)

## Likelihood to Use Travel Agents/Reasons to Use Agent – Top 3

### Out-of-Province Travel



Out-of-Province Travellers answering (n=626)  
Out-of-Province Travellers likely to use agent (n=227)

### In-Province Travel



Residents evaluating in-province destinations answering (n=564)  
Residents evaluating in-province destinations likely to use agent (n=121)

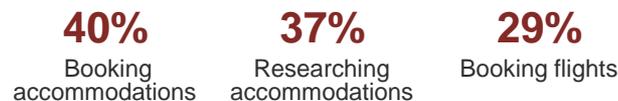
## Travel Agent Tasks – Top 3

### Out-of-Province Travel



Out-of-Province Travellers likely to use agent (n=185)

### In-Province Travel



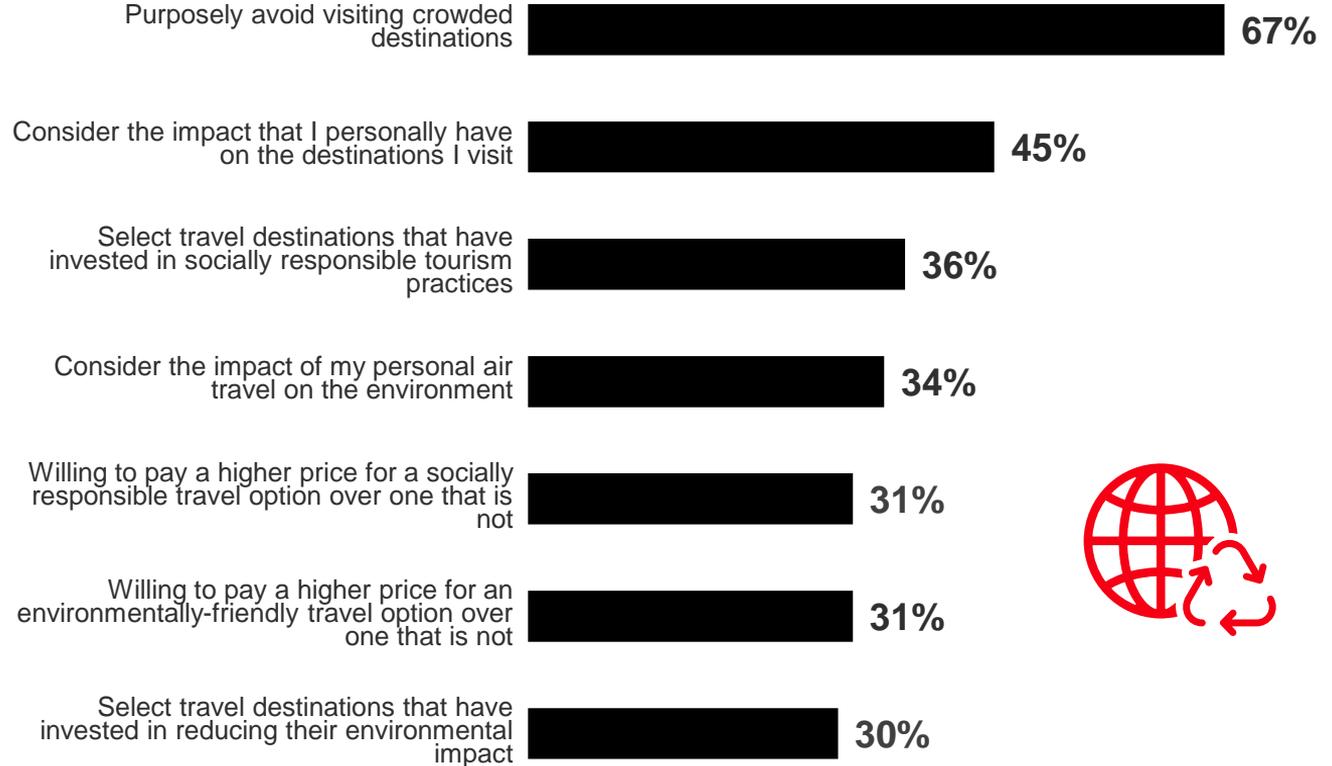
Residents evaluating in-province destinations likely to use agent (n=106)

# SUSTAINABLE TRAVEL

## Key Insights:

- Atlantic Canadians are intentionally seeking out less crowded destinations, which may be related to concerns about COVID-19.
- Close to one-third of Atlantic Canadians say they consider various aspects of sustainability when selecting travel destinations, and they may be willing to pay for more responsible options. However, only a handful mention the availability of eco-friendly travel activities as a top factor influencing their destination choice, whether for out-of-province (4%) or in-province (7%) trips. ***This suggests that while sustainability is a consideration for potential Atlantic Canadian travellers, there are other factors that play a greater deciding role in destination selection.***

## Attitudes About Sustainable Travel



Total Residents (n=1451)

## DOMESTIC TRAVEL INTENT AND CONSIDERATION

### Vacation Outlook – Next Year vs. Past Year

**S2.** How do you plan to spend your vacation time in the next 12 months compared to the last 12 months? Will you spend your vacation time ...

### Likelihood of Traveling Within Canada – Next Year

**MP6.** Realistically, how likely are you to take a vacation trip outside of your own province, but within Canada in the next year?

Market Potential – Calculated value: Total out of province travellers (S3, S5) seriously considering visiting a province (BVC1a)

### Destinations Seriously Considering – Next Year

**BVC1a.** You may have already mentioned this before, but which destinations would you seriously consider visiting in the next year? (Select all that apply)

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

### Most Appealing Destinations – Top 3 / Destination Knowledge

**MP8a.** Earlier, you mentioned you would seriously consider visiting the following provinces in the next year. Which place most appeals to you? (Select one)

**MP8b.** Earlier, you mentioned you would seriously consider visiting the following destinations in the next year. Which place most appeals to you? (Select one)

**MP3.** How would you rate your level of knowledge of vacation opportunities in each of the following destinations? (Select one for each)

## BARRIERS TO TRAVEL WITHIN CANADA

### Top 5 Barriers to Travel

**MP9.** Which of the following reasons might prevent you from travelling within Canada? (Select all that apply)

## COVID-19 CONSIDERATIONS

### Transportation Mode Likely to Use – Top 3

**COV16.** As government restrictions related to COVID-19 are relaxed, how likely are you to use the following modes of transportation?

### Incentives to Book in the Near Future – Top 3

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

### Attitudes Toward Travel – Top2Box

**COV13.** 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?

### Factors to Consider when Selecting Destination (COVID Specific) – Top 5

**NEWQ4.** When thinking about taking a vacation trip to [within province / outside your own province, but within Canada], which of the following are the most important considerations in selecting your travel destination? (Select up to 3 options)

### First Time Comfortable Travelling

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

## KEY CHARACTERISTICS OF NEXT CANADA TRIP

### Trip Purpose

**FT2.** Thinking of your next trip to [within province / outside your own province, but within Canada], what would be the main purpose of this trip?

### Trip Length – Top 1 / Travel Party – Top 3 / Accommodation – Top 3

**FT4.** Thinking of your next trip to [within province / outside your own province, but within Canada], how many nights do you think you would spend?

**FT5.** Thinking of your next trip to [within province / outside your own province, but within Canada], who would you travel with? (Select all that apply)

**FT10.** Thinking of your next trip to [within province / outside your own province, but within Canada], which types of accommodation would you consider staying at?

### Destination Selection Factors – Top 5

**FT3.** Thinking of your next trip to [within province / outside your own province, but within Canada], which of the following would factor into your choice to travel to that destination? (Select all that apply)

### Vacation Activities – Top 5

**FT11.** Thinking of your next trip to [within province / outside your own province, but within Canada], what activities would you be interested in participating in? (Select all that apply)

**MP12.** Among these activities are there any that are important enough that you would base an entire trip around that activity? (Select all that apply)

## BOOKING

### Accommodation Booking – Top 3

**FT8.** Thinking of your next trip to [within province / outside your own province, but within Canada], which methods would you be likely to use to book your accommodation? (Select all that apply)

### Likelihood to Use Travel Agents / Travel Agent Tasks – Top 3

**FT6.** Travel agents offer personalized service to help individuals, groups, and business travellers plan and organize their travel schedules, from purchasing tour packages to booking flights and hotels. Examples of travel agents include Flight Centre or Transat Travel, they do not include online booking engines like Expedia or Travelocity. Thinking of your next trip to [within province / outside your own province, but within Canada], how likely are you to use a travel agent or tour operator to help you research or book your trip?

**NEWQ2.** Which of the following reasons is the most important consideration for using a travel agent to book your next vacation trip?

### Travel Agent Tasks – Top 3

**FT7.** Which of the following would you have a travel agent or tour operator help you with? (Select all that apply)

## SUSTAINABLE TRAVEL

### Agreement with Statements – Top2Box (Strongly/Somewhat Agree)

**PC31.** Sustainable travel refers to “travel that minimizes any negative impacts on the destination’s environment, economy and society, while making positive contributions to the local people and conserving the destination’s natural and cultural heritage”. Please indicate your level of agreement with each of the following statements ...