May 20, 2021

Atlantic Canada Tourism Study Phase 3

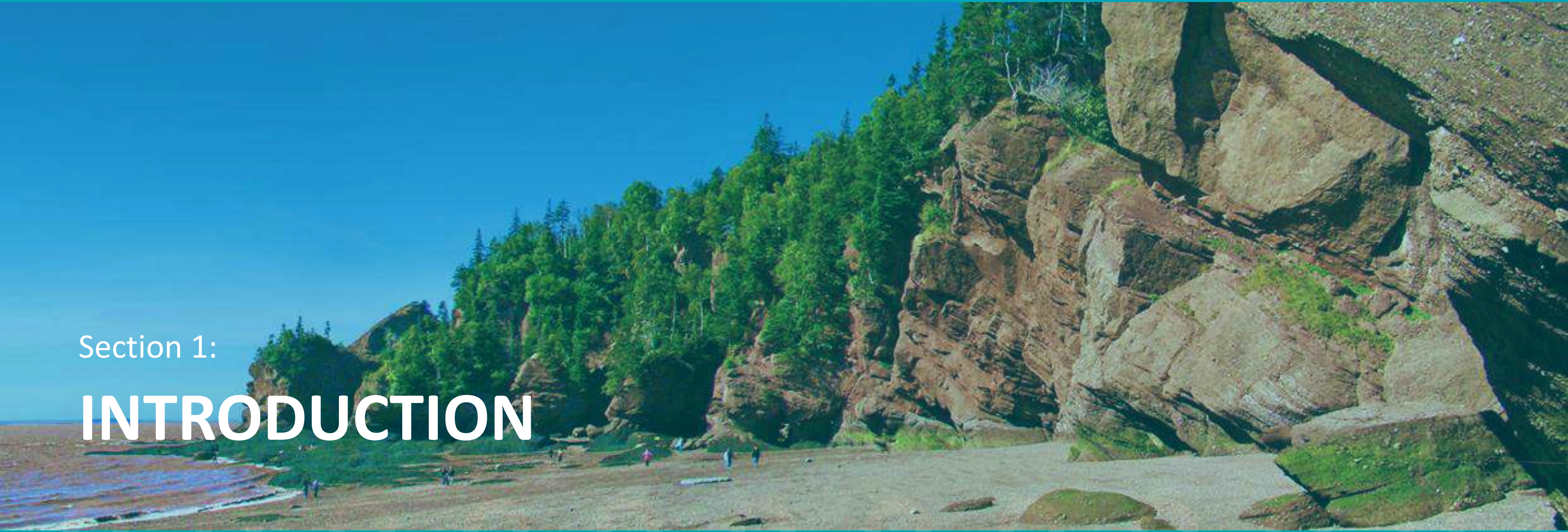
Prepared for the

Atlantic Canadian Agreement on Tourism

MQO RESEARCH RECHERCHE

Section 1:

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 as the world has passed a full year of navigating the pandemic.

The aim of this research is to provide insights into the continuing existential shift in the consumer mindset and preferences when it comes to travel. This travel study will also contribute to an increasing body of knowledge building a foundation for go-forward plans to advance through the second tourism season of the pandemic and beyond.

The present research is a follow-up to two phases of research conducted in 2020.

This report highlights the results of Phase 3, conducted eight months following the conclusion of Phase 2's data collection. Phases 1 and 2 focused on both Atlantic Canadian and Central Canadian (that is, those from Ontario and Quebec) sentiment. In light of ongoing travel restrictions resulting from the pandemic, Phase 3 targeted Atlantic Canadians only.

METHODOLOGY

Data for this project was collected through an online survey. The survey was developed by MQO Research on behalf of the Atlantic Canada Agreement on Tourism. 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 476 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 to increase the number of respondents from Prince Edward Island. Forty-seven individuals responded to the survey through this method. The remainder of the sample was recruited using an online panel.

The total sample, comprising residents of Atlantic Canada, was n=2,127. The online survey was conducted over 21 days between April 26th and May 16th.

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 14.25 minutes to complete.

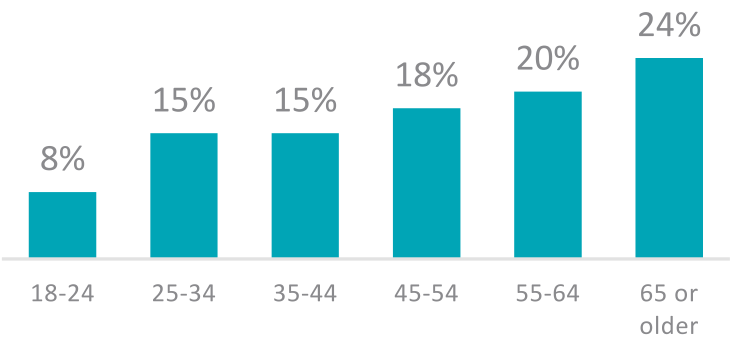
Results of the survey were analyzed using SPSS and Excel. Data as weighted by age, region and gender.

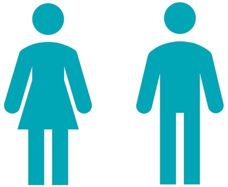
It is important to note that at the time of data collection, parts of New Brunswick approximately 3% of Atlantic Canadians had received their first dose of the vaccination. Plans to lift travel restrictions had not been announced.

SURVEY DETAILS

Respondents must have taken at least one overnight trip for pleasure in the past three years.
Data was collected online between April 26th and May 16th.
2,127 responses were collected in Atlantic Canada.

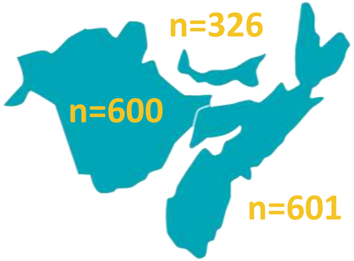
AGE BREAKDOWN





52% 48%

22% of respondents had children under age 18



HOUSEHOLD INCOME.

29% Less than $49,999	16% $100,000-$149,999
24% $50,000-$74,999	7% $150,000-$199,999
20% $75,000-$99,999	4% $200,000 or more

MQO RESEARCH RECHERCHE

Section 2:

UPCOMING SUMMER & FALL TRAVEL

CURRENT TRAVEL PLANS

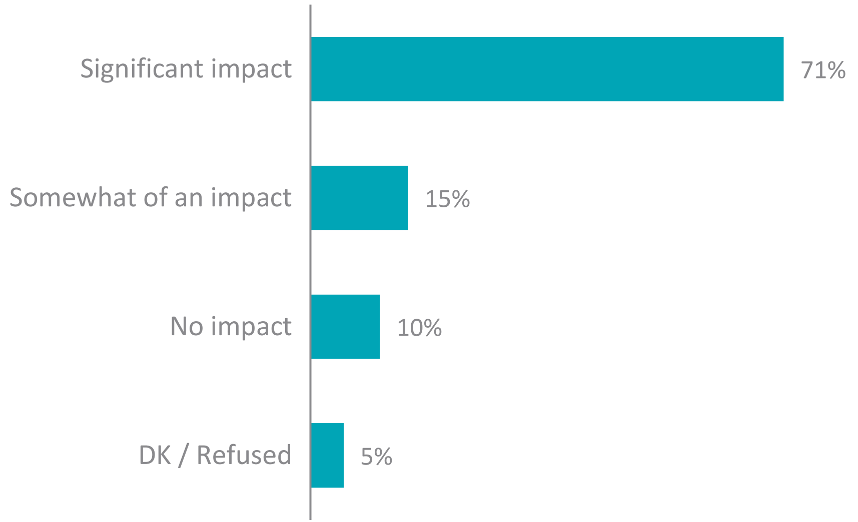
While just over half of Atlantic Canadians have current plans for summer and fall travel during 2021, those who do not have plans cite self-isolation protocols as largely driving this decision.

Just over half of surveyed Atlantic Canadians (55%) currently have plans to take a pleasure trip between May and October 2021.[1] Among those who do not have plans (45%), the majority said that self-isolation protocols for out-of-region travel have had a "significant impact" on their decision to not make plans (71%).

Among those who currently have plans, just under six in 10 plan to travel within their home province (58%). Those in Newfoundland and Labrador were far more likely to be travelling within their home province this coming summer or fall (74%).[4,5,6,7]

58% Of Atlantic Canadians who have current travel plans will be travelling within their home province.

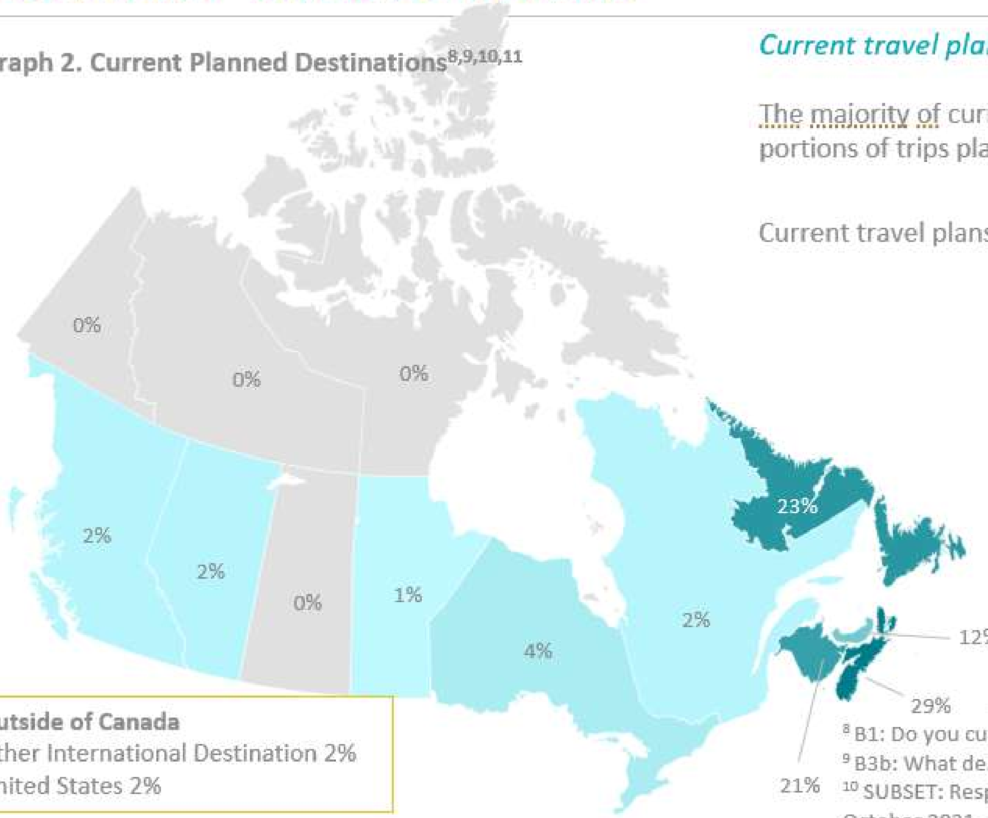
Graph 1. Impact of Self-Isolation Protocols on Decision to Not Make Travel Plans[2,3]



[1] B1: Do you currently have plans to take a pleasure trip between May and October 2021?
[2] B2: What impact have the self-isolation protocols for out-of-region travel had on your decision to not make plans for a pleasure trip between May and October 2021?
[3] SUBSET: Respondents who do not currently have plans to take a pleasure trip between May and October 2021 (n=951)
[4] B3b: What destinations are you planning to visit during between May and October 2021?
[6] SUBSET: Respondents who currently have plans to take a pleasure trip between May and October 2021, calculated by number of trips (n=2258)
[7] "Don't know" responses (3%) excluded

CURRENT TRAVEL PLANS

Graph 2. Current Planned Destinations[8,9,10,11]



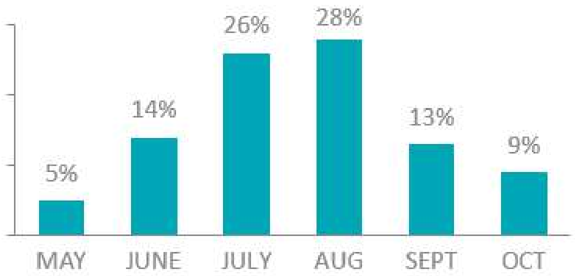
Outside of Canada
Other International Destination 2%
United States 2%

Current travel plans are concentrated primarily in Atlantic Canada.

The majority of current travel is planned for Atlantic Canada, with very small portions of trips planned for regions outside of Atlantic Canada.

Current travel plans will primarily take place in July and August (54%).

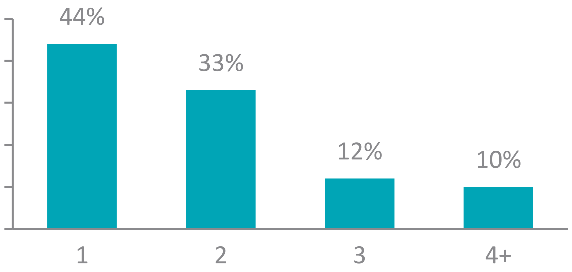
Graph 3. Current Travel Plans by Month[12,13,14]



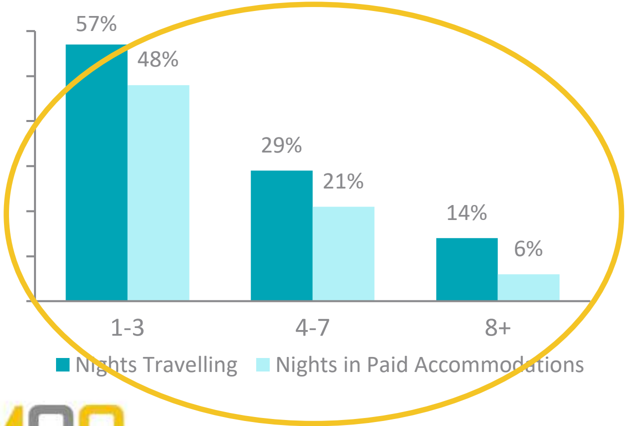
[8] B1: Do you currently have plans to take a pleasure trip between May and October 2021?
[9] B3b: What destinations are you planning to visit during between May and October 2021?
[10] SUBSET: Respondents who currently have plans to take a pleasure trip between May and October 2021, calculated by number of trips (n=2258)
[11] "Don't know" responses (3%) excluded,
[12] B3c: During which month are you planning to travel to each destination?
[13] SUBSET: Respondents who currently have plans to take a pleasure trip between May and October 2021, calculated by number of trips (n=2203)
[14] "Don't know" responses (5%) excluded, accounting for differing sample size

CURRENT TRAVEL PLANS

Graph 4. Number of Planned Trips[15,16]



Graph 5. Nights Planned for Paid Accommodation [17,18,19,20,21]



Atlantic Canadians plan to take a small number of shorter trips this tourism season.

Of those with plans, the majority of Atlantic Canadians (44%) will be taking one trip this coming summer or fall, while one third (33%) will be taking two. Smaller portions said they would be taking three trips (12%) or four or more trips (10%).

In terms of the length of these trips, the majority (57%) will involve between one and three nights away from home, while just under one third (29%) will involve between four and seven nights away from home (29%).

Comparing the responses on nights of travel and nights in paid accommodations, there was consistency across number of nights. However, one quarter (25%) said they would not be spending any nights in paid accommodations for their trips.

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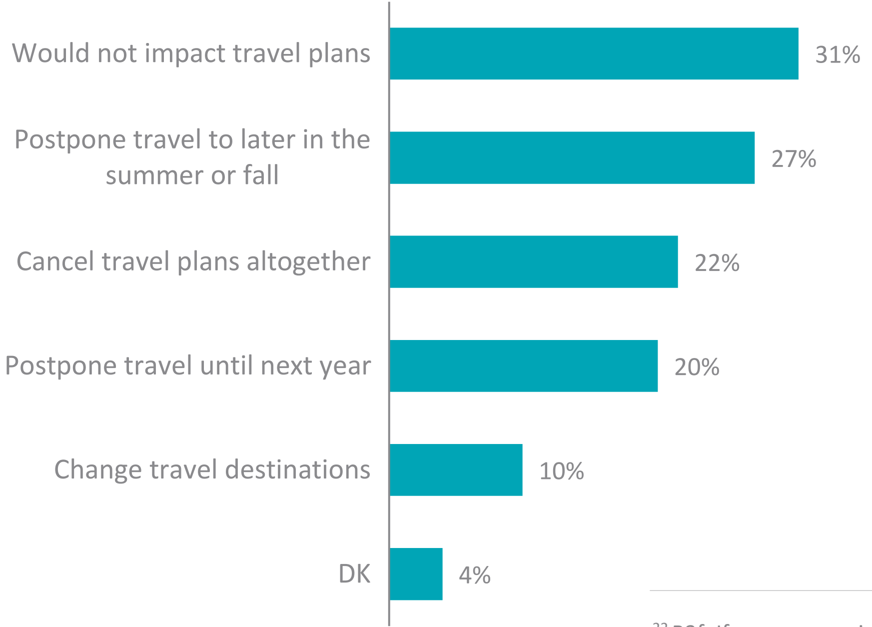
[15] B3a: How many pleasure trips do you have planned between May and October 2021?
[16] SUBSET: Respondents who currently have plans to take a pleasure trip between May and October 2021 (n=1176)
[17] B3d: How many nights will you spend away from home for this trip?
[18] SUBSET: Respondents who currently have plans to take a pleasure trip between May and October 2021, calculated by number of trips (n=1863)
[19] B3e: How many nights will you spend in paid accommodations for this trip?
[20] SUBSET: Respondents who currently have plans to take a pleasure trip between May and October 2021, calculated by number of trips (n=1781)
[21] “Don’t know” responses excluded for B3d and B3e, accounting for differing sample size

CURRENT TRAVEL PLANS

Graph 5. Intentions if Self-Isolation is Required for Out-of-Region Travel[22,23,24]



The majority of those who may be required to self-isolate upon returning to Atlantic Canada from out-of-region travel still plan to take a trip this coming summer or fall.

Those who intend to travel outside of Atlantic Canada between May and October 2021 were asked how their plans might be impacted if they are required to self-isolate upon returning to the region. Similar portions indicated that this would not impact their existing plans (31%) or they would otherwise opt to postpone their travel until later in the summer or fall (27%).

One in five said they would cancel their plans entirely (22%) or postpone their travel until next year (20%).

Among those who indicated they would change destinations, 28% said they would travel within their home province instead.[25,26]

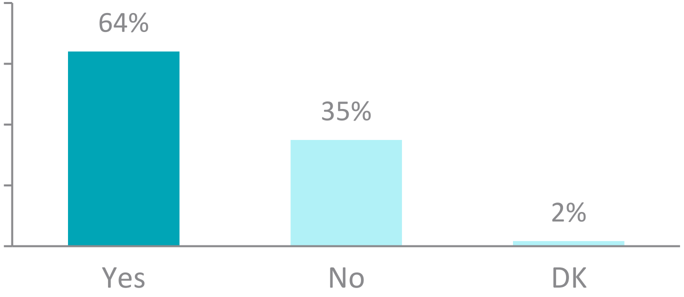
[22] B3f: If you are required to self-isolate upon returning home when travelling outside of Atlantic Canada between May and October 2021, how would this impact your travel plans?
[23] SUBSET: Respondents who currently have plans to take a pleasure trip between May and October 2021, travelling to regions outside of Atlantic Canada (n=273)
[24] Percentages may exceed 100% due to multiple mentions.
[25] B3g: Where would you travel instead?
[26] SUBSET: Respondents would change destinations (n=21)

CURRENT TRAVEL PLANS

35% Of those who have travel plans within Atlantic Canada had planned to travel to destinations outside of Atlantic Canada that they have replaced with current plans.[27,28]

There is a portion of current travellers who plan to travel within Atlantic Canada who are doing so in lieu of plans to other regions, and the majority of respondents, plans or not, said they would typically travel outside of Atlantic Canada during summer or fall prior to COVID-19.

Graph 6. Those Who Would Normally Travel Outside of Atlantic Canada Between May and October[29]



Just over one-third of respondents who have travel plans within Atlantic Canada are taking their trips in lieu of plans to destinations outside of the region, while 59% said this was not the case for them.

All respondents were asked whether they would typically travel outside of Atlantic Canada between May and October, prior to the COVID-19 pandemic, and the majority (64%) said they would normally do so.

[27] B4a: Were you planning travel to destinations outside of Atlantic Canada that you have replaced with your current plans?
[28] SUBSET: Respondents who currently have plans to take a pleasure trip between May and October 2021, travelling within Atlantic Canada (n=1022)
[29] B4b: Prior to the COVID-19 pandemic (that is, before March 2020), did you typically travel outside of Atlantic Canada in the months between May and October?

TRAVEL PARTY AND BUDGET

Participants generally did not exceed a budget of around $750 for either accommodations, dining, or activities for a four-day trip in Atlantic Canada, and they typically would be travelling with their spouse or partner.

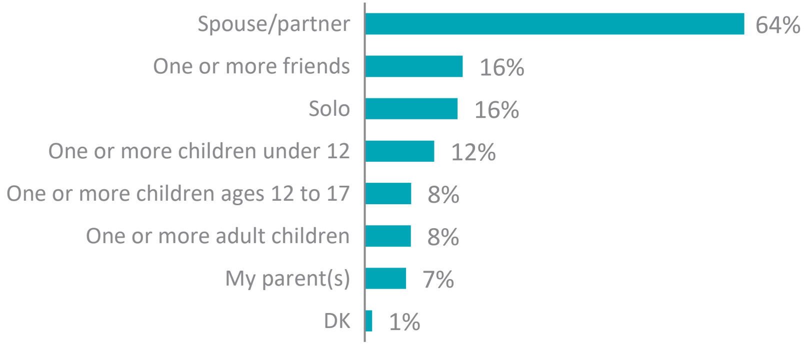
Table 1. Typical Budget for Four Nights of Travel in Atlantic Canada[30]

Accommodations	≤$100	6%
	$101-$500	36%
	$501-$750	32%
	$751-$900	12%
	$901+	11%
Dining	≤$100	11%
	$101-$500	63%
	$501-$750	15%
	$751-$900	4%
	$901+	3%
Activities and experiences	≤$100	19%
	$101-$500	52%
	$501-$750	13%
	$751-$900	4%
	$901+	5%

Most participants would not exceed a $750 budget for accommodations, dining, and activities and experiences for a four-night trip in Atlantic Canada. Taken together, most travellers would not exceed a total trip budget of $2,250.

In terms of their typical travel party, most (64%) said they travel with their spouse or partner, though around one in five said they travel with one or more friends (16%) or alone (16%).

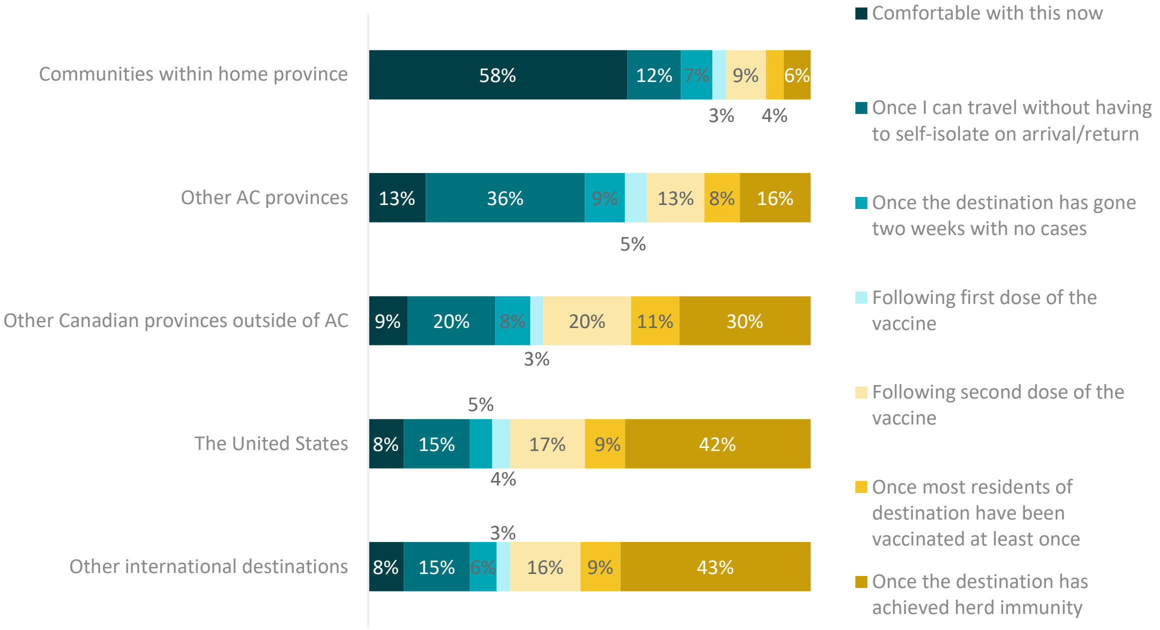
Graph 6. Typical Travel Party[31,32]



[30] B6: Imagine you are taking a trip within Atlantic Canada of four nights total. What would you expect to budget for each of the following categories?
[31] B5: Which of the following best describes your typical travel party?
[32] Percentages may exceed 100% due to multiple mentions. Respondents could indicate more than one answer, for example one might travel with a spouse/partner and one or more children under 12.

COMFORT WITH TRAVEL

Graph 7. Comfort With Travel to Different Regions[33,34]



Atlantic Canadians are largely comfortable with travel in their community now and are waiting for self-isolation protocols to be lifted for travel within Atlantic Canada but require more vaccination progress for other locations.

Locally, just under six in 10 Atlantic Canadians (58%) feel comfortable with travel to communities within their home province, and 36% indicated they would feel comfortable travelling to other Atlantic Canadian provinces once they do not have to self-isolate.

The desire for their destination to have reached herd immunity, or for travellers to have received their vaccines, becomes increasingly important outside of Atlantic Canada.

[33] B7: Based on your understanding of how vaccinations will be rolled out in your province and elsewhere in Canada, how comfortable would you feel travelling to the following destinations in each of the below scenarios?

[34] "Don't know" responses excluded

DECISION-MAKING AROUND TRAVEL

Atlantic Canadians see factors around health and safety as being most important in their decision-making around travel.

Participants were asked to rank the level of importance, from 1 to 10, of different factors in relation to their decision to travel this coming summer or fall.

The top ranked factor was *the number of active COVID-19 cases at their destination* (85%), followed by the *health and safety standards at their destination* (82%). Participants also deemed *full ticket refunds* (76%), *free cancellations* (75%), *the number of active COVID-19 cases where they live* (74%), and *"safe and clean" designation* (73%) as important.

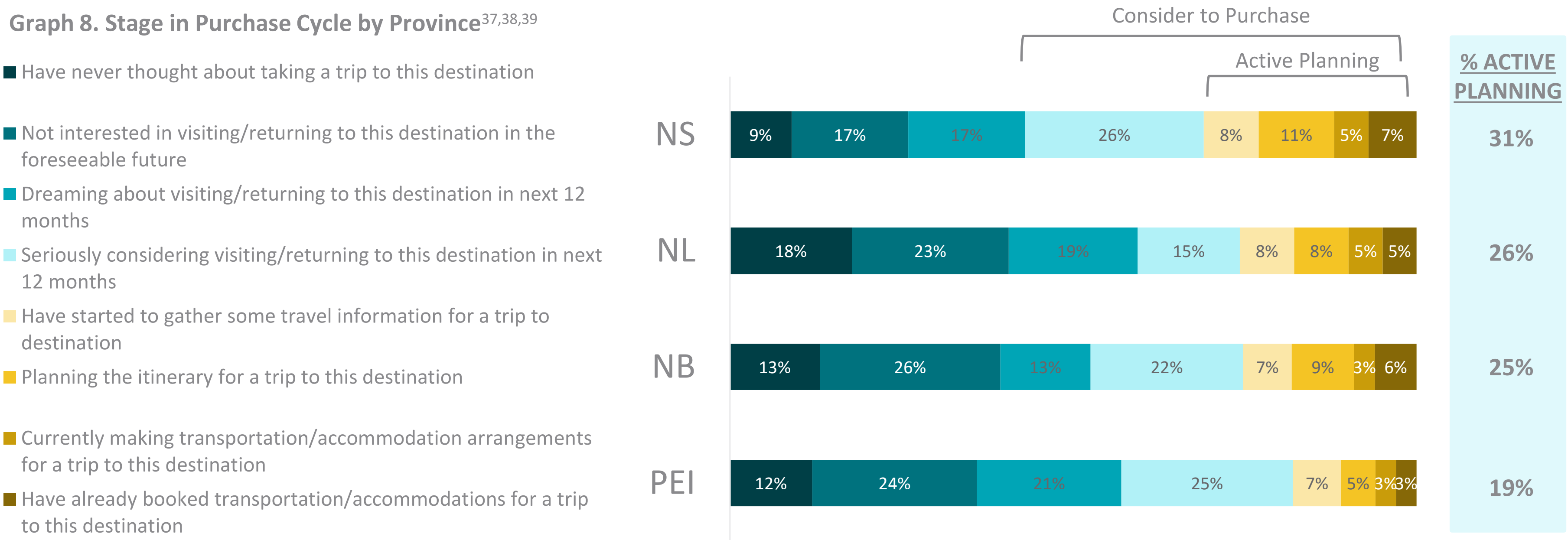
Participants placed the least importance on *the availability of digital itineraries for activities or experiences* (48%) and *discounted travel deals* (54%).

Table 2. Importance of Factors in Decision-Making for Travel[35,36]	% rated 8 or higher
The number of active COVID-19 cases at destination	85%
Health and safety standards at destination	82%
Full ticket refund policies for events/activities	76%
Free cancellations for accommodations/transportation	75%
The number of active COVID-19 cases where I live	74%
"Safe and clean" designation for businesses from regulatory body	73%
The extent to which residents of destination have been vaccinated	71%
Knowing if local residents would welcome visitors	70%
Information on cleaning procedures at destination	67%
Requirement for travellers to provide negative COVID-19 test prior to departure	65%
Information on the ability to maintain social distancing at destination	63%
Number of tourism businesses/attractions open	62%
Waived booking fees	57%
Discounted travel deals	54%
Availability of digital itineraries for activities/experiences	48%

[35] B8: How important would each of the following factors be in your decision to travel between May and October 2021? Please rate each of the following from 1 to 10, where 1 is "not at all important" and 10 is "extremely important."
[36] Don't know" responses excluded

PATH TO PURCHASE

Graph 8. Stage in Purchase Cycle by Province[37,38,39]



Nova Scotia is the most popular destination for travel planning across Atlantic Canada.

Among both those with in- and out-of-province travel plans and those without plans, in terms of destinations within Atlantic Canada, active planning (combining those who have started to gather information on a trip to those who have already booked one) was relatively low across all four Atlantic Canadian provinces, though highest for Nova Scotia (31%). Consideration to purchase was also highest for Nova Scotia (57%), as was dreaming to purchase (combining Consider to Purchase and dreaming about visiting, 74%).

[37] B9: Which of the following best describes your current situation when thinking about each of the following destinations for a pleasure trip?

[38] "Don't know" responses excluded

[39] Adapted from Destination Canada's Path-To-Purchase Model

Section 3:

PACKAGES & EXPERIENCES

INTEREST IN TRAVEL PACKAGES

There is a moderate level of interest in travel packages, and travellers find knowing costs and what is available to them in the region as most appealing when booking.

Interest in travel packages across Atlantic Canadians was moderate, with similar portions indicating that they are either "interested" or "very interested" in travel packages across a number of scenarios (illustrated in Graph 9, right).

When asked to rate elements related to packages on a scale of 1 to 10 for appeal, respondents find *knowing trip costs up front* (79% rated 8/10 or higher) and *knowing what is open and available in a region before visiting* (78% rated 8/10 or higher) particularly appealing about travel packages when booking. They were the least interested in *having a vacation fully planned out* (45% rated 8/10 or higher).

When asked how important it is that travel packages be customizable, 64% of respondents said it was either "very important" or "important." One in five (21%) said it was "moderately important."[46]

Graph 9. Interest in Travel Packages While…[40,41,42,43]

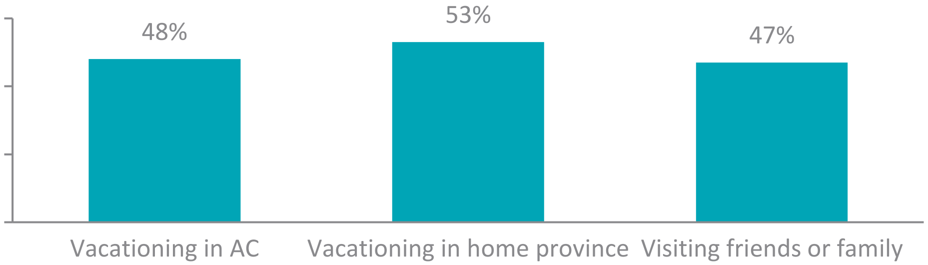


Table 3. Appeal of Elements for Booking Packages[44,45]	% rated 8 or higher
Knowing your trip costs up front	79%
Knowing what is open and available in a region before visiting	78%
Discounted rates for activities and experiences	72%
The ability to try something new as part of a travel package	58%
Having a suggested itinerary of activities to choose from	54%
Having a vacation fully planned out	45%

[40] C1: How interested would you be in a travel package for vacationing in Atlantic Canada?
[41] C2: How interested would you be in a travel package for vacationing in your home province?
[42] C3: How interested would you be in a travel package if you were visiting friends or family?
[43] % "Interested" + "Very Interested"
[44] Don't know" responses excluded
[45] C4: To what extent do the following factors appeal to you when considering booking a travel package?
[46] C5: When considering travel packages, how important is it that the package be customizable to your own interests and needs?

TRAVEL PACKAGE TESTING

Next, participants were provided with a set of five travel packages and asked a series of questions about their preferred choice and how they would budget for a trip with this package in mind.

FAMILY COTTAGE GETAWAY

A multi-day family getaway to one destination. Travellers can order food from a grocery store to be delivered just in advance of their arrival. Travellers arrive at their cottage already stocked with their favourite meals and snacks. A suggested itinerary would be provided, and travellers would select and book activities in advance. The longer the stay, the greater the savings on accommodations, restaurants, and attractions.

FAMILY REUNION

You haven't seen your friends and family for months, and everyone is craving a change of scenery. This package would offer multi-room bookings at a resort, which offers multiple activities to meet the diverse needs of a large group, for example, golf, beach, trails, spa, yoga, and relaxation. This all-inclusive package would include accommodations, activities and meals, as well as a daily group evening meal in a private room.

REGIONAL (WINE OR BREWERY) TOUR

The package includes accommodations at two or more different locations, with a suggested itinerary of activities between locations. Travellers would be offered discounts for select restaurants, attractions and wineries/breweries along the way. The self-guided itinerary would be based on the traveller's interests. Travellers would travel at their own pace but be encouraged to stop at specific locations to document their tour with photos. Only the accommodations would be booked in advance.

GETAWAY WITHIN A GETAWAY

You travel to visit and stay with family or friends you have not seen for a long time. To break up the visit, you and your travel party take a mini-getaway to a nearby location (within a one-hour drive). This package would include accommodations, easy access to trails for hiking or biking, evening and morning meals, picnic lunches, and hot tub and spa access. The full package is offered at a set price.

OUTDOOR ESCAPADES

This package would allow participants to experience nature at their desired speed. Whether its mountain bike adventure, guided nature walks, or interactive opportunities to learn about the local economy and history, packages would be designed with your interests in mind. This package could be as simple as a list of suggested activities, based on your interests, to a pre-booked series of adventures available over a period of time. (e.g., multiple day trips over a two-month period.)

TRAVEL PACKAGE TESTING

When travellers were asked to decide whether they would select each of the packages, two were tied for top preferred choice.[47]

Atlantic Canadians most commonly preferred the Outdoor Escapades and the Getaway Within a Getaway packages compared to others, with the Family Cottage Getaway the second most popular package. They were least interested in the Regional (Wine or Brewery) Tour.

Table 4. Choice of Travel Packages	% would select package[48]
Family Cottage Getaway	78%
Getaway Within a Getaway	82%
Outdoor Escapades	82%
Family Reunion	69%
Regional (Wine or Brewery) Tour	64%

FAMILY COTTAGE GETAW

TOP PICK

EGIONAL (WINE/BREWERY) TOUR

OUTDOOR ESCAPADES

TOP PICK

FAMILY REUNION

GETAWAY WITHIN A GETAW

TOP PICK

[47] C6: Next, please rate your level of interest in each of the following experiences.
[48] % "I would definitely select this package" + "I might select this package"

TRAVEL PACKAGE TESTING

FAMILY COTTAGE GETAWAY

Of those who ranked Family cottage getaways as a first choice are most likely to be families with children under 17 (39%) or families with children 12 to 17 (40%)

FAMILY REUNION

Those who ranked family reunions first are more likely to be travellers who travel with adult children. 27%

OUTDOOR ESCAPADES

Those who ranked Outdoor Escapades first are most likely to be solo travellers (22%), couples (19%) and couples travelling with friends (21%)

REGIONAL (WINE/BREWERY) TOUR

Those who ranked Regional wine tours as a first choice are most likely to be couples (18%) and couples travelling with friends (17%)

GETAWAY WITHIN A GETAWAY

Those who ranked 'Getaway within a getaway' packages were likely to be families with children under 12 (31%) and couples travelling with friends (35%)

FAMILY COTTAGE GETAWAY[49]

Most participants (49%) would be willing to spend between $101 and $750 for this package; fewer (31%) would spend between $751 and $1200 (it should be noted that the number of nights was not specified when participants were asked about pricing for packages). Similar portions indicated they would like to spend between one and three (40%) and four to seven (37%) nights for this package, and just under four in 10 (39%) said they would be interested in travelling an additional one to three nights before or after the package. More travellers preferred the idea of staying within their home province (71%) for this package.

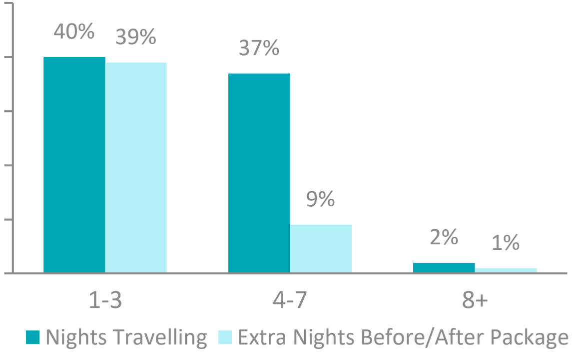
Participants were asked who they would envision joining them on their trip, they could choose multiple options. People most commonly envisioned the following travelling companions for this package: spouse/partner (68%), one or more children under 12 (24%), or one or more friends (19%).[54,55] Respondents cited *general positive mentions* (19%), the package being *family-oriented* (19%), and *outdoor activities (camping, bonfires, etc.)* (14%) as reasons for choosing this package.[54,56,57]

FAMILY COTTAGE GETAWAY

Table 5. Spend for Family Cottage Getaway[50]

≤$100	2%
$101-$500	26%
$501-$750	23%
$751-$900	15%
$901-$1200	16%
$1201-$1500	8%
$1501+	5%
DK	4%

Graph 10. Nights Travelling, Package[51,52]



Where would you consider travelling for this package?[53,54]

71% within home province

53% another province in Atlantic Canada

[49] SUBSET: Respondents who "would definitely select" the Family Cottage Getaway package (n=560)
[50] C7a_1: What would you consider the maximum amount you would be willing to spend on this type of package?
[51] C7b_1: How many nights would you like to spend travelling for this package?
[52] C7c_1: How many extra nights would you like to spend travelling before and/or after this package?
[53] Q7d_1: Where would you consider travelling for this package?
[54] Percentages may exceed 100% due to multiple mentions
[55] Q7e_1: Who would be joining you in your travel party for this package?
[56] Q7f_1: Why did you prefer this package?
[57] "Don't know" responses excluded

FAMILY REUNION[58]

Most participants (42%) would be willing to spend between $101 and $750 for this package, with 23% budgeting $101-$500; around a third (32%) would spend between $751 and $1200 (it should be noted that the number of nights was not specified when participants were asked about pricing for packages). Participants were most likely to spend between one and three (43%) nights for this package, and just over one-third (36%) said they would be interested in travelling an additional one to three nights before or after the package. Similar portions of travellers liked the idea of staying within their home province (58%) or going to another Atlantic Canadian province (55%) for this package.

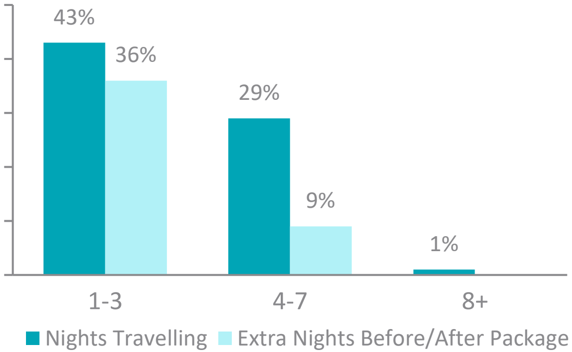
Participants were asked who they would envision joining them on their trip, they could choose multiple options. People most commonly envisioned the following travelling companions for this package: spouse/partner (61%), followed by one or more friends (22%), one or more children under 12 (20%), and one or more adult children (20%).[63,64] Respondents cited *family reunion/spending time with family* (36%), and *general positive mentions* (19%) as reasons for choosing this package.[63,65,66]

FAMILY REUNION

Table 6. Spend for Family Reunion[59]

≤$100	5%
$101-$500	23%
$501-$750	19%
$751-$900	17%
$901-$1200	15%
$1201-$1500	7%
$1501+	6%
DK	8%

Graph 11. Nights Travelling, Package[60,61]



Where would you consider travelling for this package?[62,63]

58% within home province
55% another province in Atlantic Canada

[58] SUBSET: Respondents who "would definitely select" the Family Reunion package (n=505)
[59] C7a_2: What would you consider the maximum amount you would be willing to spend on this type of package?
[60] C7b_2: How many nights would you like to spend travelling for this package?
[61] C7c_2: How many extra nights would you like to spend travelling before and/or after this package?
[62] Q7d_2: Where would you consider travelling for this package?
[63] Percentages may exceed 100% due to multiple mentions
[64] Q7e_2: Who would be joining you in your travel party for this package?
[65] Q7f_2: Why did you prefer this package?
[66] "Don't know" responses excluded

MQO RESEARCH RECHERCHE

REGIONAL (WINE OR BREWERY) TOUR[67]

Most participants (56%) would be willing to spend between $101 and $750 for this package, with 35% budgeting $101-$500 (it should be noted that the number of nights was not specified when participants were asked about pricing for packages). Participants were more likely to want to spend between one and three nights travelling (58%) for this package than for other packages. Just over one-third (34%) said they would be interested in travelling an additional one to three nights before or after the package. Similar portions of travellers liked the idea of staying within their home province (62%) or going to another Atlantic Canadian province (61%) for this package.

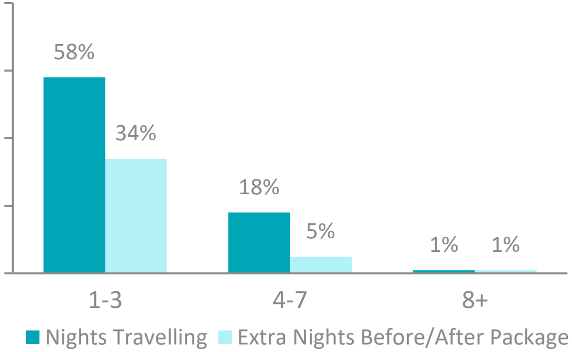
Participants were asked who they would envision joining them on their trip, they could choose multiple options. People most commonly envisioned the following travelling companions for this package: spouse/partner (63%), or with one or more friends (25%).[72,73] Respondents cited being interested in *wine/wineries/wine tours* (37%) and finding the package *appealing/interesting* (17%) as reasons for choosing this package.[72,74,75]

REGIONAL (WINE/BREWERY) TOUR

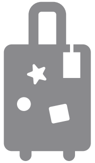
Table 7. Spend for Regional (Wine/Brewery) Tour[68]

≤$100	3%
$101-$500	35%
$501-$750	21%
$751-$900	13%
$901-$1200	11%
$1201-$1500	5%
$1501+	3%
DK	8%

Graph 12. Nights Travelling, Package[69,70]



Where would you consider travelling for this package?[71,72]



62% within home province
61% another province in Atlantic Canada

[67] SUBSET: Respondents who "would definitely select" the Regional (Wine or Brewery) Tour package (n=507)
[68] C7a_3: What would you consider the maximum amount you would be willing to spend on this type of package?
[69] C7b_3: How many nights would you like to spend travelling for this package?
[70] C7c_3: How many extra nights would you like to spend travelling before and/or after this package?
[71] Q7d_3: Where would you consider travelling for this package?
[72] Percentages may exceed 100% due to multiple mentions
[73] Q7e_3: Who would be joining you in your travel party for this package?
[74] Q7f_3: Why did you prefer this package?
[75] "Don't know" responses excluded

GETAWAY WITHIN A GETAWAY[76]

Most participants (53%) would be willing to spend between $101 and $750 for this package; 27% would spend between $751 and $1200 (it should be noted that the number of nights was not specified when participants were asked about pricing for packages). Participants were more likely to want to spend between one and three nights travelling (49%) for this package. Just under four in 10 (37%) said they would be interested in travelling an additional one to three nights before or after the package. More travellers preferred the idea of staying within their home province (65%) for this package.

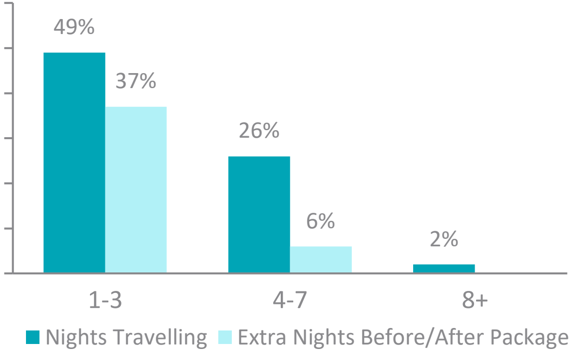
Participants were asked who they would envision joining them on their trip, they could choose multiple options. People most commonly envisioned the following travelling companions for this package: spouse/partner (65%), or with one or more friends (22%).[81,82] Respondents cited *relaxing/peaceful/quiet* (23%), *general positive mentions* (15%), and *fun/exciting/enjoyable* (14%) as reasons for choosing this package.[81,83,84]

GETAWAY WITHIN A GETAWAY

Table 8. Spend for Getaway With a Getaway[77]

≤$100	3%
$101-$500	29%
$501-$750	24%
$751-$900	15%
$901-$1200	12%
$1201-$1500	7%
$1501+	6%
DK	4%

Graph 13. Nights Travelling, Package[78,79]



Where would you consider travelling for this package?[80,81]

65% within home province

59% another province in Atlantic Canada

[76] SUBSET: Respondents who "would definitely select" the Getaway Within a Getaway package (n=723)
[77] C7a_4: What would you consider the maximum amount you would be willing to spend on this type of package?
[78] C7b_4: How many nights would you like to spend travelling for this package?
[79] C7c_4: How many extra nights would you like to spend travelling before and/or after this package?
[80] Q7d_4: Where would you consider travelling for this package?
[81] Percentages may exceed 100% due to multiple mentions
[82] Q7e_4: Who would be joining you in your travel party for this package?
[83] Q7f_4: Why did you prefer this package?
[84] "Don't know" responses excluded

OUTDOOR ESCAPADES[85]

Most participants (54%) would be willing to spend between $101 and $750 for this package; one in five (21%) would spend between $751 and $1200 (it should be noted that the number of nights was not specified when participants were asked about pricing for packages). Participants were more likely to want to spend between one and three nights travelling (43%) for this package. Just over one-third (35%) said they would be interested in travelling an additional one to three nights before or after the package. More participants preferred the idea of staying within their home province (65%) for this package.

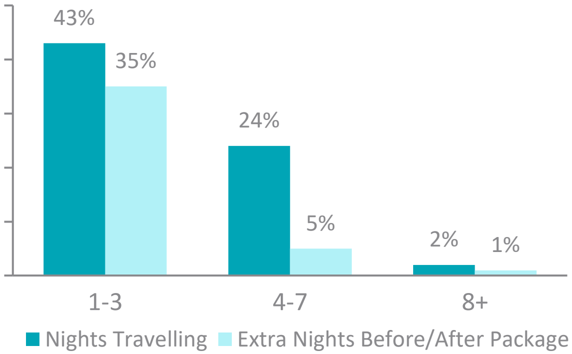
Participants were asked who they would envision joining them on their trip, they could choose multiple options. People most commonly envisioned the following travelling companions for this package: spouse/partner (62%), or with one or more friends (20%).[90,91] Respondents cited *nature/outdoor activities* (28%), *general positive mentions* (13%), and *fun/exciting/enjoyable* (11%) as reasons for choosing this package.[90,92,93]

OUTDOOR ESCAPADES

Table 9. Spend for Outdoor Escapades[86]

≤$100	5%
$101-$500	29%
$501-$750	25%
$751-$900	11%
$901-$1200	10%
$1201-$1500	7%
$1501+	5%
DK	8%

Graph 14. Nights Travelling, Package[87,88]



Where would you consider travelling for this package?[89,90]

65% within home province
58% another province in Atlantic Canada

[85] SUBSET: Respondents who "would definitely select" the Outdoor Escapades package (n=697)
[86] C7a_5: What would you consider the maximum amount you would be willing to spend on this type of package?
[87] C7b_5: How many nights would you like to spend travelling for this package?
[88] C7c_5: How many extra nights would you like to spend travelling before and/or after this package?
[89] Q7d_5: Where would you consider travelling for this package?
[90] Percentages may exceed 100% due to multiple mentions
[91] Q7e_5: Who would be joining you in your travel party for this package?
[92] Q7f_5: Why did you prefer this package?
[93] "Don't know" responses excluded

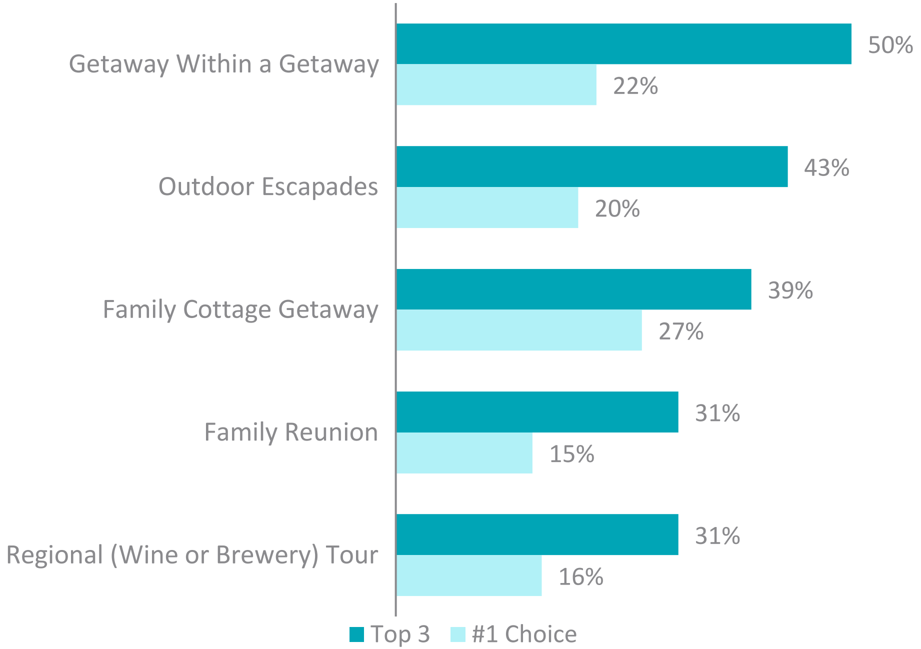
TRAVEL PACKAGE RANKING

The Getaway Within a Getaway and Outdoor Escapades packages remained popular when ranked, though the Family Cottage Getaway was most commonly travellers' number one choice.

Among those who "would definitely select" one of the package options, the Getaway Within a Getaway package was most commonly ranked within participants' top three choices (50%). Outdoor Escapades (43%) and the Family Cottage Getaway (39%) were also popular choices among the top three.

However, the Family Cottage Getaway package was most likely to be chosen as participants' top pick (27%), followed by the Getaway Within a Getaway package (22%).

Graph 15. Travel Packages Ranked[94,95,96]



[94] C8: Please rank your preferred packages numerically, where 1 is your top choice, 2 is your second choice, and so on.
[95] SUBSET: Respondents who "would definitely select" at least one of the packages (n=1453)
[96] Percentages for Top 3 may exceed 100% due to multiple mentions

BUILD YOUR OWN TRAVEL PACKAGE

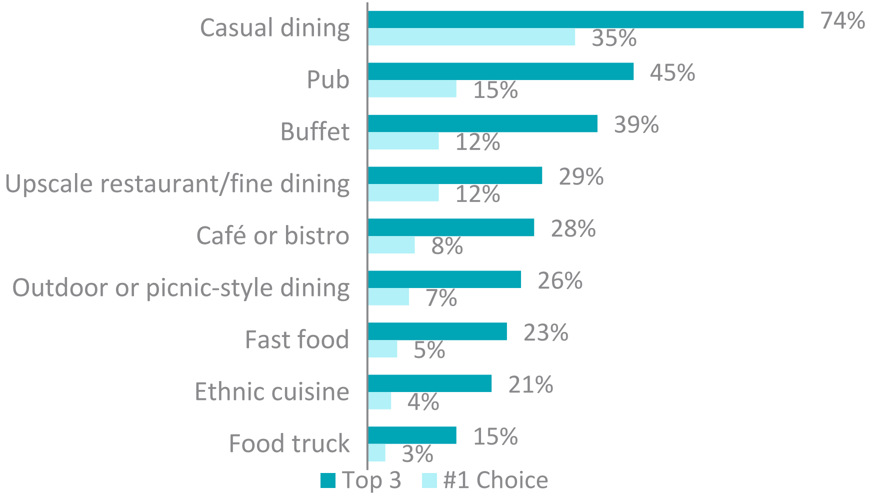
Top Paid Accommodation Types[97]

33% AirBnB

18% Resort

14% Large hotel chain

Graph 16. Top Preferred Styles of Dining[98,99]



When given the opportunity to build a custom travel package, participants preferred renting private accommodations and casual dining as factoring into their dream package.

Atlantic Canadians were asked to build their dream travel package, including a variety of options for accommodations and dining. Their top preferred paid accommodation type was renting a privately-owned cottage, home, or apartment (e.g., and AirBnB) (33%), followed by a resort (18%), or a large hotel chain (14%).

In terms of dining, casual dining ranked as a top choice both within the top three ranking as well as participants' number one choice. Other popular options included pubs (45% within top three preferred options) and buffets (39% within top three).

[97] C9a: Next, we would like you to build your dream travel package. First, please select your TOP preferred type of paid accommodation.
[98] C9b: Next, please select your TOP THREE preferred dining options. Please rank each option where 1 is your top choice, 2 is your second choice, and 3 is your third choice.
[99] Percentages for Top 3 may exceed 100% due to multiple mentions

BUILD YOUR OWN TRAVEL PACKAGE

Table 10. Top Five Activity Choices[100,101,102]	
Visiting a beach	39%
Hiking or walking	29%
Having a bonfire	25%
Shopping	24%
Going on a tour of a historical site	24%
Restaurant/culinary experiences	23%
Coastal sightseeing	23%
Music concerts/festivals	21%
Visiting wineries or breweries	21%
Visiting provincial or national parks	20%
Whale watching	20%
Amusement/water parks	17%
Visiting a museum or art gallery	15%
Nature observing	14%
Camping/RVing	13%
Sailing/boat tours	12%
Theatre performances/plays	12%
Visiting spas or wellness centers	10%
Zip-lining/parasailing or other adventure activities	10%
Golfing	10%

Table 10 shows the top selected activities for a travel package. Key outdoor activities ranked highly among travellers.

Table 11 illustrates prospective budget, with most preferring to pay between $101 and $750, or between $901 and $1200. However, when travellers were asked to estimate travel spends for dining, accommodations and entertainment total trip spends for a 4 night were much higher, averaging around $1,300 per trip.

Table 11. Spend for Dream Package[103]	
≤$100	1%
$101-$500	18%
$501-$750	22%
$751-$900	15%
$901-$1200	19%
$1201-$1500	10%
$1501+	8%
DK	8%

100 C9c: Finally, select UP TO FIVE types of activities or experiences you would want to participate in for your package.
101 Items under 10% not shown in Table 10
102 Percentages for Top 5 may exceed 100% due to multiple mentions
103 C9d: What would be the maximum amount you would be willing to spend for the package you have created?

PREFERRED WAY TO TRAVEL IN ATLANTIC CANADA

Next, participants were provided with a set of four travel scenarios and were asked to select which best describes them. Self-booked, independent travel was the most common, with 55% identifying this way.[104,105]

55%

Taking a trip that does not follow a pre-set itinerary. You research, plan, and book your own accommodations and activities. You book some things in advance and travel independently.

15%

Taking a trip that does not follow a pre-set itinerary. You do not plan ahead, but instead wait for last minute offers to get the best deal.

14%

Taking a trip that follows a pre-set itinerary supplied by a tourism business. For example, an online travel agent would create an itinerary of your flights, hotels, and transportation as requested. You follow the itinerary independently without a tour guide.

7%

Escorted tours that are pre-designed, led by travel experts, and usually have pre-set dates and itineraries to choose from. These packages usually include the hotel, transportation, some meals, and admission costs to the activities scheduled. Flights may also be included or available as an add-on option. At your destination, you and your party join the larger group of their escorted tour, which would vary in size depending upon the supplier and the destination.

[104] C10: Which of the following four descriptions best describes your preferred way to travel in Atlantic Canada?
[105] "Don't know" 8%

PREFERRED WAY TO TRAVEL

Participants who preferred pre-set itineraries or guided tours are willing to spend more for those experiences; spend on self-guided experiences is budgeted lower.

In terms of budget for different types of travel, those who chose self-guided trips that are booked in advance would be most likely to sped between $101 and $750. Those who indicated they do not plan ahead but wait for last minute offers were willing to pay slightly more, and 30% would budget between $501 and $750.

On the other hand, those interested in packages that involve pre-set itineraries were generally willing to pay more, especially if it involved escorted tours with a tour guide (for example, 32% were willing to pay $1201 or more for an escorted tour with pre-set dates and itineraries).

Table 12. Spend for Preferred Way to Travel[106,107]

Taking a trip that does not follow a pre-set itinerary. You research, plan, and book your own accommodations and activities.	≤$100	2%	2%
	$101-$500	21%	43%
	$501-$750	22%	
	$751-$900	14%	29%
	$901-$1200	15%	
	$1201+	17%	17%
Taking a trip that does not follow a pre-set itinerary. You do not plan ahead, but instead wait for last minute offers to get the best deal.	≤$100	3%	3%
	$101-$500	21%	51%
	$501-$750	30%	
	$751-$900	15%	28%
	$901-$1200	13%	
	$1201+	13%	13%
Taking a trip that follows a pre-set itinerary supplied by a tourism business. You follow the itinerary independently without a tour guide.	≤$100	0%	0%
	$101-$500	16%	38%
	$501-$750	22%	
	$751-$900	15%	37%
	$901-$1200	22%	
	$1201+	22%	22%
Escorted tours that are pre-designed, led by travel experts, and usually have pre-set dates and itineraries to choose from.	≤$100	1%	1%
	$101-$500	12%	23%
	$501-$750	11%	
	$751-$900	15%	36%
	$901-$1200	21%	
	$1201+	32%	32%

106 C11: What would be the maximum amount you would be willing to spend for this type of travel?

107 SUBSET: Respondents who chose each of the travel types

Section 4:

PRELIMINARY CONCLUSIONS & RECOMMENDATIONS

PRELIMINARY CONCLUSIONS & RECOMMENDATIONS

The key, preliminary take-aways from Phase 3 of the Atlantic Canadian Tourism Study are summarized as follows:

Atlantic Canadians will be taking fewer, shorter trips closer to home this upcoming summer and fall, within moderate budgets.

- Most surveyed Atlantic Canadians who have travel plans (55%) will be taking one (44%) or two (33%) trips this tourism season, with the majority spending one to three nights travelling (57%).
- Over half (58%) will be travelling within their home province for their upcoming trips; indeed, most travel for the upcoming tourism season is concentrated in Atlantic Canada, with small portions planning to travel elsewhere in Canada.
- Around one third (35%) of those with plans said they are travelling within Atlantic Canada this year in lieu of going elsewhere.
- Nova Scotia is the most popular destination for travel in Atlantic Canada, with the highest portion of active planning, consideration of planning, or dreaming of travelling compared to other Atlantic Canadian provinces.

With these factors in mind, experiences and offerings can be planned to accommodate demand for shorter trips. Tourism operators can anticipate local demand and plan accordingly.

PRELIMINARY CONCLUSIONS & RECOMMENDATIONS

Atlantic Canadians want to travel, but self-isolation restrictions and vaccination status present the main barriers at this time.

- Among those who currently do not have plans (45%), the majority (71%) said that self-isolation restrictions have had a "significant impact" on this decision.
- If self-isolation continues to be required for out-of-region travel, although around a third of traveller's plans will not be impacted (31%), notable portions of travellers plan to postpone travel or cancel plans altogether.
- When it comes to decision-making around travel, information on COVID-19 caseload and health and safety standards feature heavily in travellers' priorities (for example, 85% of travellers ranked *the number of active COVID-19 cases at their destination* an 8 out of 10 or higher in terms of importance, and 82% ranked *health and safety standards at their destination* an 8 out of 10 or higher). Three-quarters (73%) also ranked *"safe and clean" designation from a regulatory body* an 8 out of 10 or higher.
- Participants also ranked *full ticket refunds* (76%) and *free cancellations* (75%) an 8 out of 10 or higher in terms of decision-making around booking travel.
- In addition, Atlantic Canadians are largely comfortable with travel in their community now but are waiting for self-isolation protocols to be lifted for travel within Atlantic Canada: 36% would feel comfortable travelling in Atlantic Canada once these protocols are lifted, with further portions feeling comfortable travelling in Atlantic Canada once their destination has gone two weeks without cases (9%), and once they receive their first (5%) and second (13%) vaccine doses.

Tourism operators can ensure that information is provided to travellers about health and safety in their region once travellers are able to book a trip, including "safe and clean" designations, and can include refunds and other cancellation policies in their offerings to help meet pent-up travel demand.

PRELIMINARY CONCLUSIONS & RECOMMENDATIONS

In terms of travel packages and experiences, travellers like knowing costs and availability of activities up-front, but prefer flexibility in all other areas of their experience. Outdoor activities and experiences were also popular, within moderate budgets.

- When asked to rate elements related to packages on a scale of 1 to 10 for appeal, respondents found *knowing trip costs up front* (79% rated 8 out of 10 or higher) and *knowing what is open and available in a region before visiting* (78% rated 8/10 or higher) particularly appealing about travel packages when booking. They were the least interested in *having a vacation fully planned out* (45% rated 8 out of 10 or higher).
- When asked how important it is that travel packages be customizable, 64% of respondents said it was either "very important" or "important."
- Participants showed the most preference for travel packages that included set prices or a multitude of available activities, as well as outdoor activities with their families/partners. Most (between 47% and 59%) would not exceed $750 for a package.
- The majority (55%) indicated that they prefer to travel without a pre-set itinerary, planning some things in advance but travelling independently.

Travel packages with flexibility and a variety of potential options may have the most success among travellers this coming season. While costs can be offered up-front, operators can include add-ons for activities or experiences at set costs so that travellers know what is available and how much they can expect to pay.