



Quarantine on Return to Canada Survey

October 6 to 13, 2020

Methodology

- Survey was emailed to tripcentral.ca customers
- Mostly leisure travel customers
- Ontario and Atlantic Canada overrepresented
- Survey in English only
- Obtained 4,577 responses over one week starting Oct 6th



Premise of the Survey

- To test opinions about the 14-day quarantine on return to Canada from an international destination
- **Hypothesis:** The need to quarantine on return creates a significant economic barrier and cost to travel, reducing demand
- Those not interested in a complete lift of the 14-day quarantine skipped other more restrictive variation questions
- All respondents were queried for **other reasons** preventing them from booking international travel, including the 14-day quarantine on return to Canada

How interested would you be in booking international travel if the 14-day quarantine on return to Canada was removed (no longer applied)?

Answer	% Responses
Extremely interested	26.05%
Very interested	18.70%
Somewhat interested	21.57%
	66.32%
Not so interested	11.12%
Not at all interested	22.57%
	33.69%

Of the 66.32% showing interest, the drop off to “no interest” with alternatives to lifting the quarantine on return to Canada

Change	% of Interested Become Not Interested
Testing on Arrival	
Not so interested	5.07%
Not at all interested	4.47%
	9.54%
2 Home Tests Arrival + 5 Days	
Not so interested	7.22%
Not at all interested	5.83%
	13.05%
14 Day Quarantine Reduced to 5 Days	
Not so interested	18.69%
Not at all interested	10.54%
	29.23%

Other Reasons, “Extremely Interested” (26% n=1208)

Reasons for Not Booking International Travel	% of those Extremely Interested	# Responses
The 14 Day quarantine on return to Canada	80.36%	970
Not being able to get a refund if I chose not to travel	64.21%	775
Chance of being quarantined abroad if I contracted COVID	63.38%	765
Inability to get medical coverage for COVID	54.27%	655
Fear of contracting COVID while outside Canada	26.01%	314
Fear of contracting COVID while on the airplane	24.19%	292
Having to wear a mask at the airport and on the flight	16.57%	200
Concerns about the ability to social distance during a trip	15.41%	186
Concerns about sanitization during the journey	13.67%	165
Overall case count rising in my home province	12.51%	151
NONE OF THESE would stop me from booking	4.23%	51

Other Reasons, “Very Interested” (18.7% n=893)

Reasons for Not Booking International Travel	% of those Very Interested
Chance of being quarantined abroad if I contracted COVID	76.64%
The 14 Day quarantine on return to Canada	72.47%
Not being able to get a refund if I chose not to travel	71.99%
Inability to get medical coverage for COVID	69.13%
Fear of contracting COVID while outside Canada	54.71%
Fear of contracting COVID while on the airplane	46.25%
Concerns about the ability to social distance during a trip	31.59%
Concerns about sanitization during the journey	27.89%
Overall case count rising in my home province	25.98%
Having to wear a mask at the airport and on the flight	17.64%
NONE OF THESE would stop me from booking	1.79%

Other Reasons, “Somewhat Interested” (21.5% n=970)

Reasons for Not Booking International Travel	% of those Somewhat Interested
Chance of being quarantined abroad if I contracted COVID	85.05%
Not being able to get a refund if I chose not to travel	77.11%
Inability to get medical coverage for COVID	76.49%
Fear of contracting COVID while outside Canada	75.26%
Fear of contracting COVID while on the airplane	64.54%
The 14 Day quarantine on return to Canada	58.04%
Concerns about the ability to social distance during a trip	55.36%
Concerns about sanitization during the journey	42.58%
Overall case count rising in my home province	40.21%
Having to wear a mask at the airport and on the flight	19.69%
NONE OF THESE would stop me from booking	0.72%

Other Reasons – Not Interested (33.7% n=1549)

Reasons for Not Booking International Travel	% of those Not Interested
Fear of contracting COVID while outside Canada	90.38%
Chance of being quarantined abroad if I contracted COVID	82.12%
Fear of contracting COVID while on the airplane	81.47%
Inability to get medical coverage for COVID	74.18%
Not being able to get a refund if I chose not to travel	73.27%
Concerns about the ability to social distance during a trip	71.98%
Concerns about sanitization during the journey	62.30%
Overall case count rising in my home province	55.46%
The 14 Day quarantine on return to Canada	38.22%
Having to wear a mask at the airport and on the flight	21.30%
NONE OF THESE would stop me from booking	0.17%

If vaccine widely available (like flu), interest level in booking international travel n=4570

Answer	Responses
Extremely interested	31.64%
Very interested	29.63%
Somewhat interested	24.29%
	85.56%
Not so interested	5.93%
Not at all interested	8.51%
	14.44%

Compared to simply removing the 14 day quarantine, a widely available vaccine (like the flu) would “only” increase interest from 66.32% to 85.56%

If Government lifted “non-essential travel advisory”, interest in booking int’l travel n=4570

Answer	Responses
Extremely interested	26.21%
Very interested	26.48%
Somewhat interested	29.85%
	82.54%
Not so interested	10.39%
Not at all interested	7.07%
	17.46%

If pandemic declared ended by Government, interest in booking int'l travel (n=4570)

Answer	Responses
Extremely interested	41.62%
Very interested	31.33%
Somewhat interested	21.23%
	94.18%
Not so interested	3.50%
Not at all interested	2.32%
	5.82%

If pandemic declared ended by Government, interest in booking int'l travel of those NOT interested if the Quarantine on Return removed (n=1553)

Answer	Responses
Extremely interested	18.09%
Very interested	27.04%
Somewhat interested	39.86%
	84.99%
Not so interested	8.95%
Not at all interested	6.05%
	15.00%

* The 15% still not interested could well be for non-pandemic reasons – health, family, financial situation. The survey did not test for other reasons, but simply assumed there would be some interest in booking international travel in the future.

Given all you know, what is your best guess as to when you'd feel comfortable booking international travel?

When	Extremely n=1204	Very n=835	Somewhat n=967	Not Interested n=1541	Overall n=4547
Right Now	19.60%	5.03%	0.62%	0.78%	6.51%
Weeks not Months	13.37%	7.31%	1.34%	0.32%	5.28%
Winter 2021	23.17%	18.56%	17.06%	12.65%	17.46%
Spring 2021	27.57%	34.01%	22.85%	9.02%	21.46%
Fall 2021	10.38%	22.28%	33.61%	26.22%	22.87%
2022 or later	5.90%	12.81%	24.51%	51.01%	26.41%

* Survey flaw. Summer 2021 was not offered as a choice in error. This could skew Spring and Fall 2021 numbers, or even 2022 numbers. This should be corrected in future research.

For those feeling comfortable to book between now and Winter 2021, what are the barriers?

Answer	Responses
The 14 Day quarantine on return to Canada	65.81%
Not being able to get a refund if I chose not to travel	65.06%
Chance of being quarantined abroad if I contracted COVID	64.68%
Inability to get medical coverage for COVID	57.00%
Fear of contracting COVID while outside Canada	37.95%
Fear of contracting COVID while on the airplane	32.61%
Concerns about the ability to social distance during a trip	26.58%
Concerns about sanitization during the journey	21.54%
Overall case count rising in my home province	18.75%
Having to wear a mask at the airport and on the flight	17.77%
NONE OF THESE would stop me from booking	4.59%

Testing on Return vs Blanket Quarantine

- 2/3 of Canadians are interested in booking international travel if the 14 day quarantine were lifted
- Less than 10% “drop off” if there were testing on return to Canada
- 13% drop off if there were two negative home tests (on return and 5 days after – similar to Calgary pilot)
- 29% drop off if the 14 day quarantine were reduced to 5 days
- There is **strong support** for **testing on return** to meet public health objectives vs quarantining healthy people

Other BIG Reasons Blocking Demand

- It's not just the quarantine on return, economic cost
- Other financial risks are nearly as strong
 - Risk of not getting a refund on travel services
 - Insurance coverage risks
- Fear of being quarantined abroad is very strong
 - Emotional vs economic uncertain (needs further research)
 - Removal of quarantine on return alone may not stimulate demand
 - Big risk if testing is done before return flights, quarantining abroad

Testing Before Return Flights Problematic

- Current rate of positivity 0.8% (Air Canada / McMaster study)
- 1 or 2 positive cases on every flight
- Testing PRIOR to departure from Canada (lower risk to spread in destinations) and testing AFTER return to Canada (preventing community spread) will increase demand, test more people, and identify positive cases
- Testing on arrival in destinations and before return flights will result in global “away from home quarantines” (cost, emotions) and increase risk of high insurance claims
- Air Ambulance return premiums would be very high

Additional Research

- Modify survey to add province of residence
- Ask survey respondents to rank up to 4 highest barriers in importance
- Correct booking window question to include summer 2021
- Translate survey into French
- Distribute through ACTA for distribution through travel agencies for larger sample size and provincial cross tab analysis

Government Warnings vs Personal Risk

- Government policy is a significant barrier to international travel (quarantines, testing, travel warnings)
- Personal Risk – particularly financial is equally important (insurance coverage, no refunds, quarantine abroad)
- Airlines, hotels and other suppliers in the travel industry can mitigate personal financial risk with policy change / products
- Travel suppliers can do more to market health and safety policies and available insurance coverage