

Vaccines & Leisure Travel Booking Survey

February 24 to 28, 2021

Survey Constructs

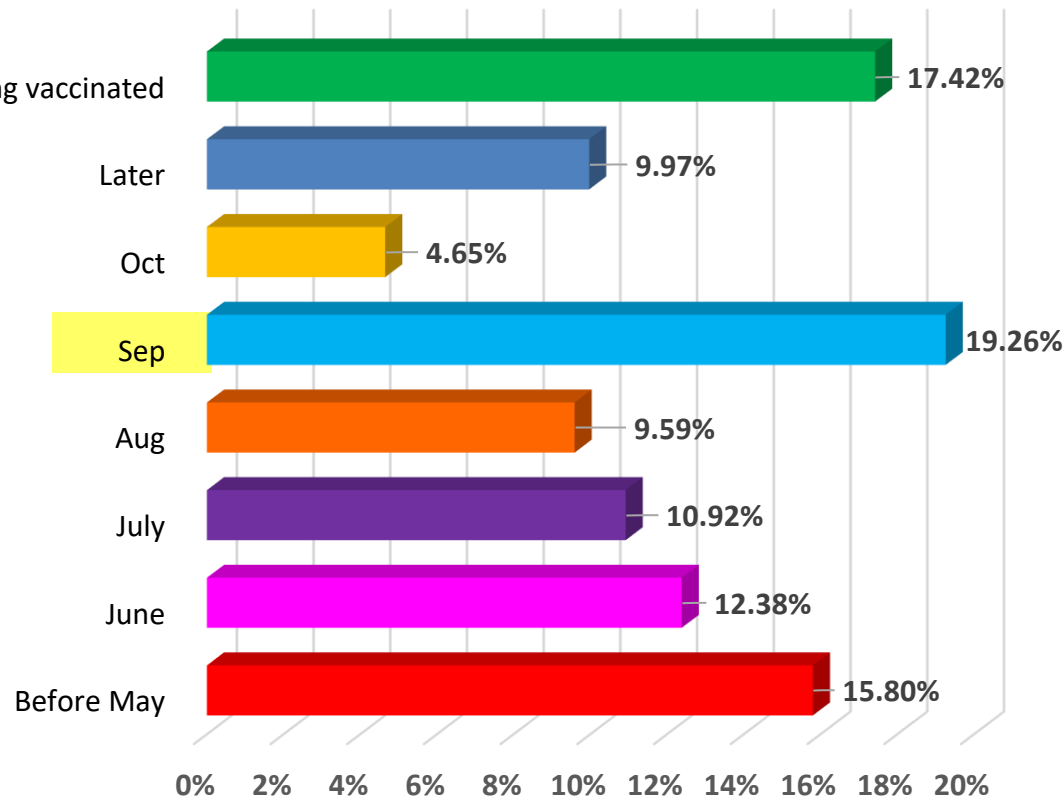


- Sent to tripcentral.ca past customers and weekly email list
- Skewed towards Ontario and Atlantic Canada
- tripcentral.ca is mass market, leisure travel focused
- Heavy skew towards packaged vacations
- Unscientific poll
- Intentionally anonymous (no demographic data attributed)
- 5,785 completed surveys between February 24 to 28, 2021

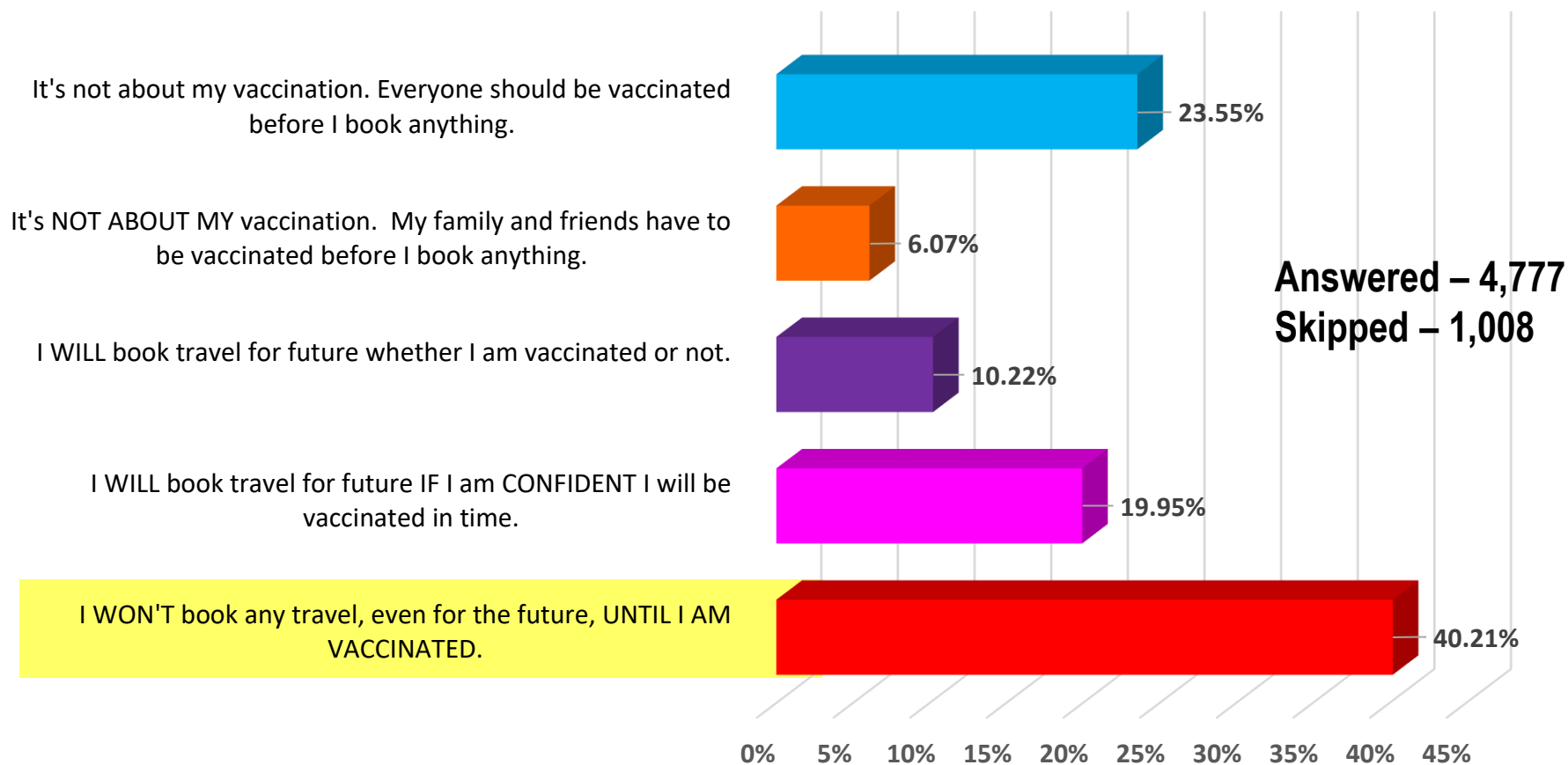
Q1: It is expected that all Canadians who want to be vaccinated will be completed by September.

When do YOU expect to be vaccinated?

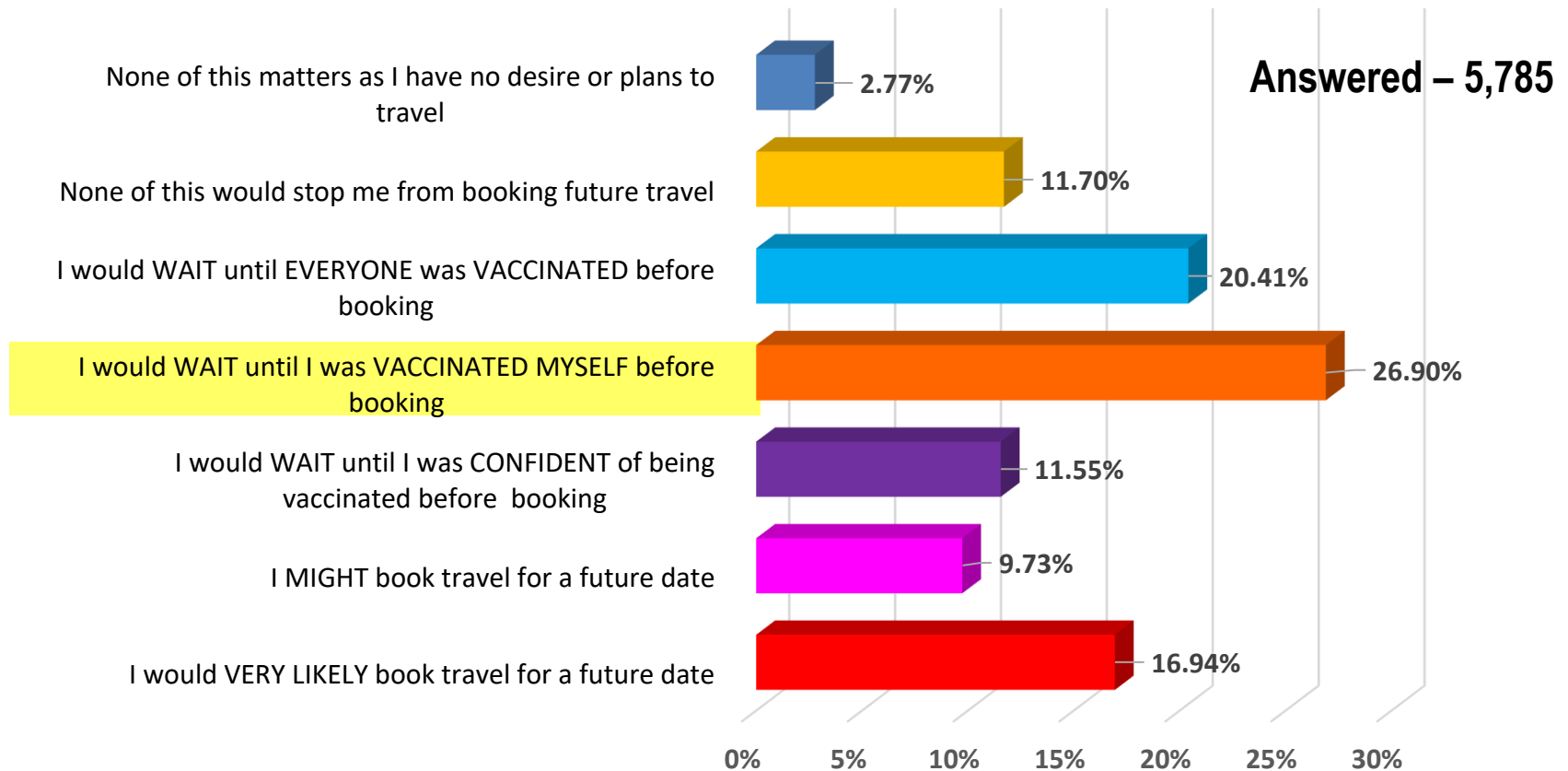
Answered – 5,785



Q2: How would YOU being vaccinated affect your decision to book travel?



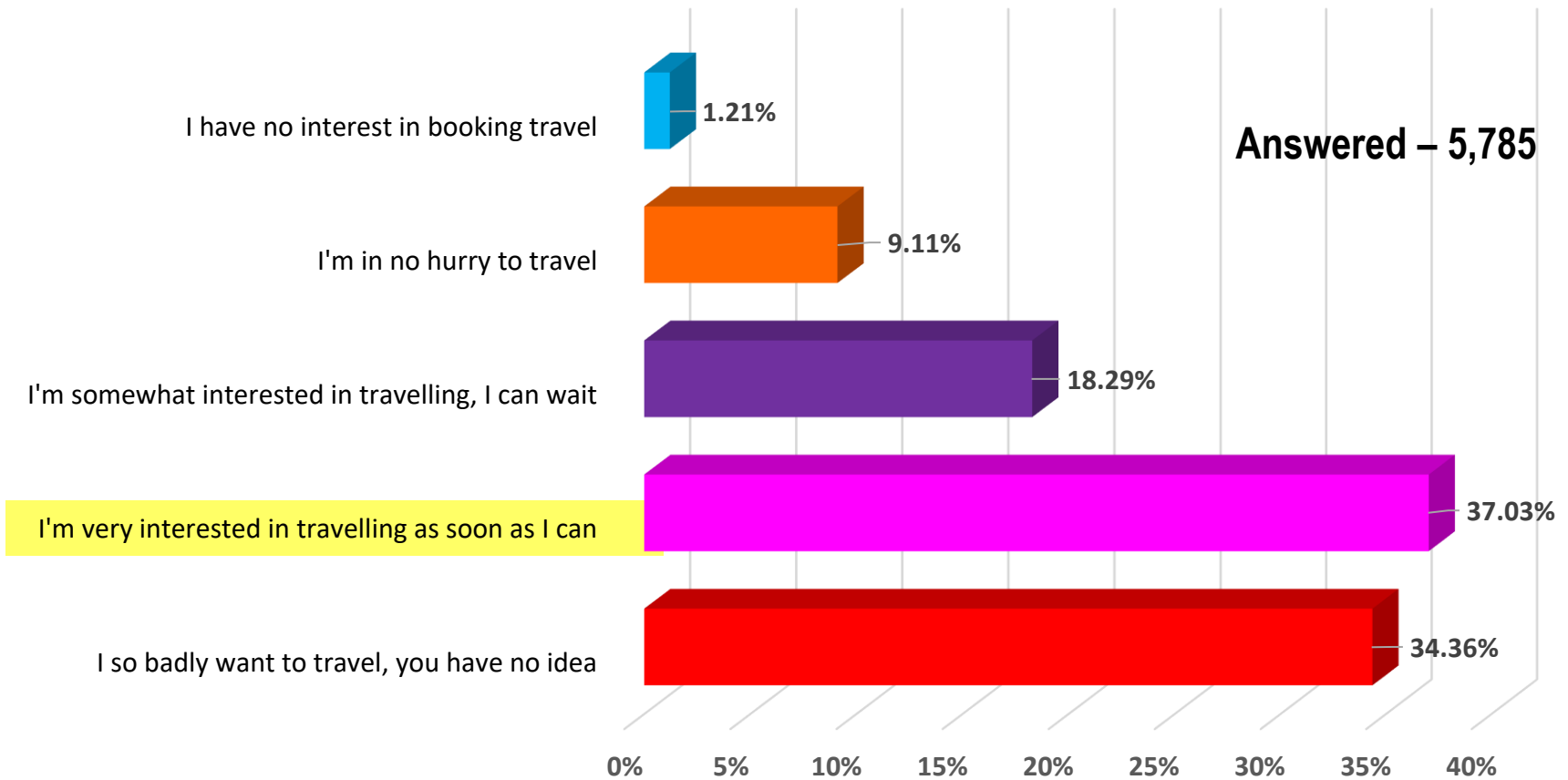
Q3: If by May or June, hospitalizations and death rates are dramatically lower because the older population and vulnerable have been vaccinated ...



Q4: Rank your concerns about booking travel - "1" being the highest concern...

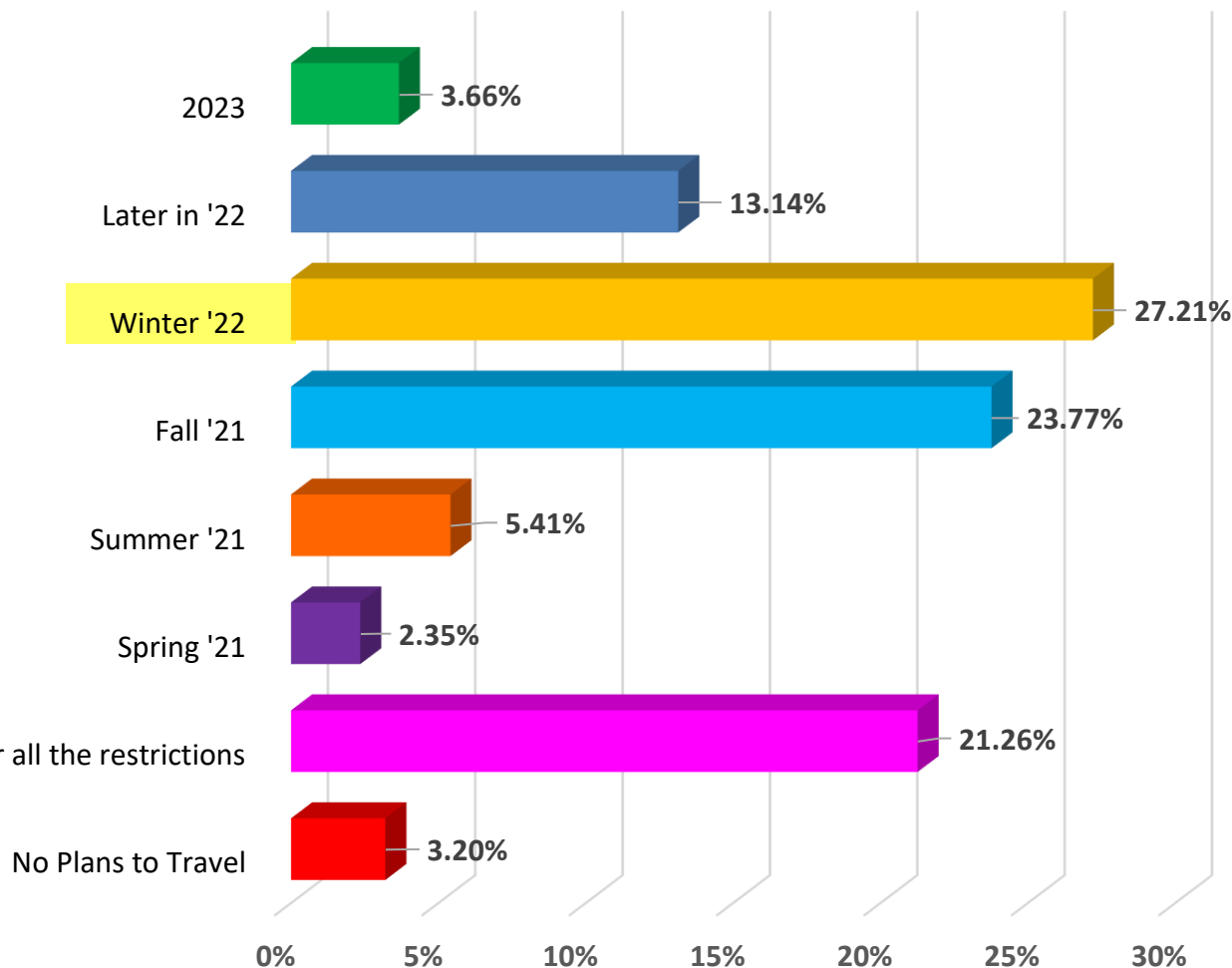
| | 1st Concern | | 2nd Concern | |
|--|-------------|--------------|-------------|--------------|
| Not being vaccinated yet | 36.99% | 2,140 | 16.34% | 945 |
| Quarantine on Return | 32.32% | 1,870 | 17.58% | 1,017 |
| People in destination not being vaccinated, even if I am | 18.46% | 1,068 | 20.85% | 1,206 |
| Having to get tested before flights | 7.80% | 451 | 24.34% | 1,408 |
| Family & friends not being vaccinated yet | 4.43% | 256 | 20.90% | 1,209 |
| | | 5,785 | | 5,785 |

Q5: How likely are you to book travel, when the time is right for you?



Q6: Based on everything you know today, when do you think you will want to travel?

Answered – 5,785



**Q7: Rank the type of trip you see booking first.
Rank only what you intend to book.
Skip if you intend to book nothing.**

| | 1st Choice | | 2nd Choice | |
|------------------------------|------------|--------------|------------|--------------|
| All Inclusive Sun Vacation | 57.87% | 2,906 | 19.49% | 979 |
| Visit friends or relatives | 32.30% | 1,135 | 24.25% | 852 |
| A city stay in Canada or USA | 13.37% | 461 | 26.86% | 926 |
| Europe | 13.14% | 427 | 24.59% | 799 |
| Cruise | 10.66% | 285 | 13.76% | 368 |
| My vacation home | 7.97% | 189 | 11.81% | 280 |
| Tour | 3.85% | 99 | 6.57% | 169 |
| | | 5,502 | | 4,373 |

Expectations of Vaccinations

- **2/3** of sample **expect to be vaccinated by September**, per the Government rollout plan
- **80%** of those **who want a vaccination** expect to have it by September
- **17.42%** of sample is **not interested** in getting vaccinated



1,008 not interested in being vaccinated

- **47%** say not being vaccinated will **NOT stop** them from **booking travel**
- **33%** say they very likely **would book** in **May or June**
- **11%** say they **might book** in May or June
- **Quarantine** on return is **#1 concern** for **68%**
- Having to get **tested prior to a flight** is **2nd** at **21%**
- **#2 concern** - **#1 choice** is having to get tested before a flight - **60%**
- **47%** **so badly want to travel**, you have no idea; **33%** very interested
- Government restrictions are holding this group back
- **61%** said “I’d **go away now** if there were no restrictions”
- All inclusive vacation **#1** at **63%**; Visit Friends & Relatives **#2** at **27%**

3,362 will book now, or if confident of being vaccinated, or if vaccinated

- Over **80%** expect to be vaccinated by September
- **Not being vaccinated** themselves is the **#1** concern at **45%**
- **Quarantine on Return** ranks **second** as the **#1** concern at **30%**
- **2nd highest concern** is **people in destination not being vaccinated yet @ 23%**
- **2nd ranking 2nd concern** is **family and friends** not being vaccinated **20%**
- **70%** of this group would like to **travel in 2021** or **winter 2022**
 - **Spring '21- 2.5%, Summer - 6.7%, Fall - 30%, Winter '22 - 29%**
- Even after being vaccinated, a sizeable percentage of people have concerns about their destination and their friends and family

1,125 who think everyone should be vaccinated before booking any travel

- **85% believe** they will be vaccinated by September
- If by May or June, hospitalizations and death rates were dramatically lower, **68%** of this group **would still wait** for everyone to be vaccinated before booking anything
- **12%** said they **might book** something if things looked better in May / June
- **40%** of this group cited **people in destination not being vaccinated** and their own vaccination as their first concern
- **51%** of this group are **very interested** or **so badly** want to travel
- **27%** said they **can wait**, and **19%** said they were in **no hurry** to travel
- **35%** think they will travel in **Winter '22**, **16% Fall '21**
- **26%** think they will travel **later in 2022** and **9%** in **2023**



Types of Travel Demand



- **All inclusive** vacations were **#1** for **60%** who think they **will travel Fall & Winter**
- Fall and Winter people chose **cruise 12%** for 1st choice
- **Europe as 1st choice** (n=427) chose **Fall 25%**, and later in **2022** for **19%**
- **Cruise** as their 1st, 2nd, or 3rd choice (n=958), only 7% thought they would travel in Spring / Summer '21. **25%** chose **fall '21**, **27% winter '22**, and **12% later** in '22

Conclusions

- tripcentral.ca customers are mostly **confident about vaccine rollout**
- **If vaccines rollout according to plans:**
 - **Small demand** for bookings **in the spring** if case / hospitalizations on track
 - Bookings will begin **slowly** for fall and winter travel **after people are vaccinated** themselves; **confident of being vaccinated** in the coming months
 - A sizeable group **will wait** until **friends & family** or **everyone** is vaccinated indicating **much more booking activity in the fall**
 - Demand **will not fully recover** until our **destinations are vaccinated** and / or **restrictions are lifted**
- Those **not interested in the vaccine** are mostly **not travelling due to restrictions**
- There is **strong desire to book** travel and “pent up demand”

