

Report



THE STATE OF THE TRAVELER AMID THE COVID-19 PANDEMIC

Prepared for the Wilderness Tourism
Association of the Yukon (WTAY) on
behalf of the Tourism Industry
Association Yukon (TIAY)

Leger



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Context & Background

Since March 2020, the COVID-19 global pandemic has significantly hurt the travel and tourism industries.

Leger was contacted by the Wilderness and Tourism Association of the Yukon (WTAY) on behalf of the Tourism Industry Association of the Yukon (TIAY) to compile this secondary market research report. The goal of this report is to help TIAY further understand the general public's sentiment towards travel or future travel as the COVID-19 pandemic remains ever-present in consumers' lives and vaccine distribution edges forward.

The research in this report covers:

- Travel restrictions currently mandated by Canada's federal governments and provincial governments
- How the COVID-19 pandemic effected travel plans in 2020
- How travelers have adapted to the COVID-19 pandemic
- Public sentiment towards travel in a post-pandemic world
- British Columbians' & Albertans' sentiments towards travel during and after the COVID-19 pandemic
- Americans' sentiments towards travel during and after the COVID-19 pandemic
- Germans' sentiments towards travel during and after the COVID-19 pandemic
- The types of travelers, or non-travelers, in a global health pandemic

Methodology

This research report consists of findings from Leger's and DataPath Systems's desk research of publicly available data. This report does include publicly available research conducted by Leger, but such research was not specifically conducted for this report. Research and report drafting began in December 2020 and was completed in March 2021.

Executive Summary

As of the completion of this research, travel and tourism data tells the story of a **hesitant but eager** domestic and global population. **Hesitant** to take the risk of traveling while mandated government restrictions remain in place as the COVID-19 global health pandemic lingers. **Eager** to travel again after over one-year of pandemic lockdowns.

Resumption of regular travel and tourism will undoubtedly rely on governments deeming it safe to do so, as well as the widespread distribution of COVID-19 vaccines. **80% of Canadians intend to travel once restrictions have been lifted**, and 75% of Canadians noted that their decision to travel will be influenced by clear communication of measures put in place to protect them from COVID-19.

One-in-three Canadians will feel comfortable travelling across Canada once the government deems it safe, while 42% are more inclined to travel abroad when possible. Until then, 64% of Canadians view the pandemic lockdowns as a time to indulge in ‘staycations.’

Of course, the nature of the COVID-19 pandemic is fluid, and different regional governments make different regional decisions regarding pandemic restrictions. Therefore, some travel markets will be more accessible than others as 2021 progresses. For example, domestic travel between most Canadian provinces and territories is more accessible than travel between the United States and Canada, although still challenging.

Discussions of a potential travel bubble between Yukon, British Columbia and Alberta have reportedly taken place. This would mean that the mandatory self-isolation rule for all those entering Yukon would not apply to residents of BC or Alberta. Allowing these potential tourists to carry out travel activities freely upon arriving in the territory would remove a major barrier when one is considering their travel logistics.

Discussions around the reopening of the Canada-U.S. border have also recently renewed – Prime Minister Justin Trudeau and newly elected President Joe Biden have held talks in the early days of the Biden presidency. While the Prime Minister and the President maintain that now is not the time to reopen the border, New York congressman Brian Higgins believes it should be possible to reopen the border by July 4, 2021. Higgins has even written a letter to President Biden encouraging a gradual easing of the border restrictions, and a partial reopening by the end of May 2021.

This could open the Yukon to potential American tourists. **American travel-interest in Canada is consistent with pre-pandemic levels, and searches for rural, remote destinations have increased by almost 150%.**

In European markets, discussion of mandatory digital proof of a COVID-19 vaccination for all travelers is growing louder. Over 60 travel and tourism organizations have shown support for such an initiative and hope to see it implemented before the summer travel season of 2021, as 54% of Europeans are planning to take a trip before the end of July 2021. Development on this front may help encourage Germans, a key demographic for Yukon tourism, to visit the territory before the year’s end.

Current Travel Restrictions

During the COVID-19 pandemic, prospective Canadian travelers must factor in mandated rules around travel-related quarantining. Be it quarantining upon arriving at their destination, or quarantining upon returning to their home province or territory, this is a rule that must be considered when consumers are making travel decisions.

Across Canada, different provinces and territories maintain different quarantine standards for incoming domestic travelers – such as residents returning from a domestic trip.

British Columbia, Alberta, Saskatchewan, Ontario and Quebec do not require a mandatory 14-day isolation for domestic travelers, although it is strongly advised.^{1,2,3,4,5} These provincial governments currently advise residents to only leave the province if the travel is essential.

Manitoba, Newfoundland and Labrador, New Brunswick, Nova Scotia and Prince Edward Island do require domestic travelers to self-isolate for 14-days upon entering the province with few exceptions.^{6,7,8,9,10} Further, the Atlantic provinces have imposed much stricter rules, creating an ‘Atlantic Bubble’ that prohibits almost anyone who isn’t a resident from entering the province.

Those travelling to **Yukon, Northwest Territories and Nunavut** must also isolate for 14 days.^{11,12,13} However, Nunavut allows isolation to take place in Ottawa, Winnipeg, Edmonton or Yellowknife if travelling by air. Residents of Northwest Territories are exempt from the 14-day isolation rule in Nunavut.

Moreover, as of February 22, 2021, aside from selected exemptions, **all international travelers arriving in Canada are required to show proof of a negative COVID-19 molecular test result taken within 72 hours of your scheduled departure time.** Travelers must also take a COVID-19 molecular test at the Canadian airport upon arrival, and **the visitor will be required to quarantine at a government selected hotel for 3 days while awaiting results to of the additional test.** If the test result is negative, the traveler can move to another location to complete the 14-day quarantine, so long as they provide proof of an approved quarantine plan.¹⁴

Impact of COVID-19 on 2020 Travel Plans

Due to widespread lockdown orders, mandated travel restrictions and a general fear of contracting and spreading the novel Coronavirus, travel in 2020 was down significantly. Using the holiday season as an example: **travel in December 2020 was down by 48% compared to December 2019 in the United States**. Using the same measure, road travel was down by 19%, air travel was down by 68% – while **hotel occupancy was at 38% in December 2020 compared to 61% in December 2019 in the United States**.¹⁵

As for Canada, in June 2020, **50% of Canadian travelers said they cancelled some or all of their 2020 vacation plans**. Outside of outright cancellations, a small proportion of travelers, 14%, had made the decision to modify their travel plans in the wake of COVID-19. Of those who have changed their travel plans: 56% postponed their trip to a later date, 27% changed their destination to one that they could drive to instead of flying to and **21% changed their plans from an international trip to a domestic vacation**.¹⁶

Pandemic Travel^{16,17}

There is evidence of a shift in inclination towards local, regional and provincial travel among Canadians.

In June 2020, **64% of Canadians planned to take more ‘staycations’** throughout the following 12 months. In December 2020, 71% of Canadians said it was not very likely or not at all likely they would travel internationally for holidays in 2021, while 85% said it was not very likely or not at all likely they would travel internationally for business purposes in 2021.

Canadians do have a desire to travel more extensively again, but are willing to wait until it is safe to do so. 73% of Canadians said they were looking forward to being able to travel again, and 78% of Canadians said they were willing to wait until it is safe to travel again.

Of those who did have travel plans, 61% planned to use a vehicle as their mode of transportation instead of flying.

Canadians also noted key elements that they will factor into their decision when considering future travel plans. In addition to searching for cultural attractions (68%), fun attractions (59%) and iconic landmarks (53%), Canadians also plan to take into consideration measures that will help protect them from COVID-19. Specifically, Canadians noted that **their decision to travel will be influenced by: clear communication of measures put in place to protect them from COVID-19 (75%), areas designated as being COVID-19 free (71%) and the ability to avoid large crowds or gatherings (68%)**.

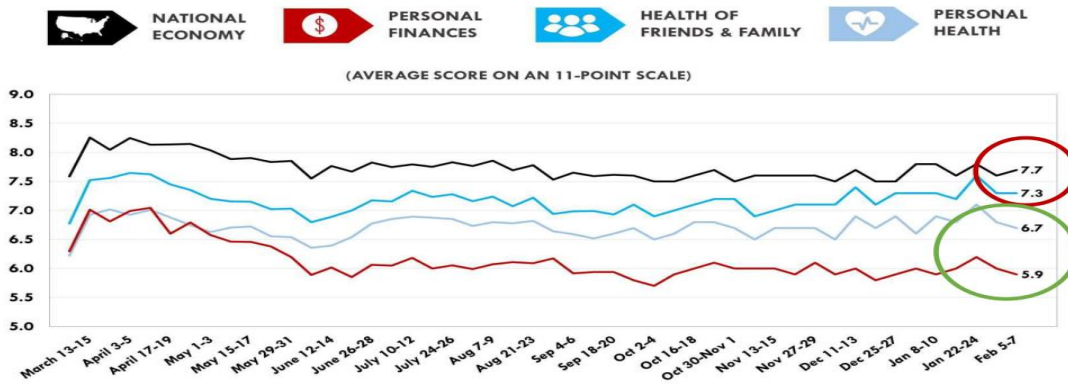
Willingness to travel nationally will be primarily influenced by the government’s indication that it is safe to do so again. **30% of Canadian travelers would feel comfortable travelling to neighbouring provinces, and across the rest of Canada once the government indicates that it is safe to travel again**.

Canadians’ comfort levels with international travel are largely impacted by the distribution of a COVID-19 vaccine. Specifically, one-third of Canadians noted they would feel comfortable travelling to the United States (30%), Mexico/Central America (31%) and abroad (35%) once COVID-19 vaccinations are commonplace.

77% of Canadians will either definitely get, or probably get vaccinated.

In the United States, there have been slight improvements in American attitudes towards travel. Concerns for personal finances, health of friends and family and personal health have all improved since early 2021.

NATIONAL ANXIETY MAP: HIGH CONCERNS ABOUT COVID-19'S IMPACT AS OF FEBRUARY 7, 2021



QUESTION: THINKING ABOUT THE CURRENT CORONAVIRUS SITUATION, HOW CONCERNED ARE YOU ABOUT THE IMPACT IT MAY HAVE ON THE/YOUR _____ ?

(Base: Waves 1-48. All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214, 1,214, 1,205, 1,231, 1,365, 1,213, 1,200, 1,206, 1,224, 1,201, 1,202, 1,207, 1,250, 1,225, 1,205, 1,200, 1,205, 1,203, 1,203, 1,204, 1,203, 1,203, 1,205, 1,206, 1,205, 1,205, 1,204, 1,206, 1,201, 1,207, 1,206, 1,225, 1,205, 1,206, 1,209 and 1,209 completed surveys.)

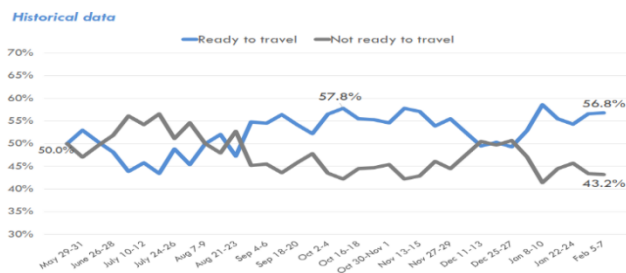
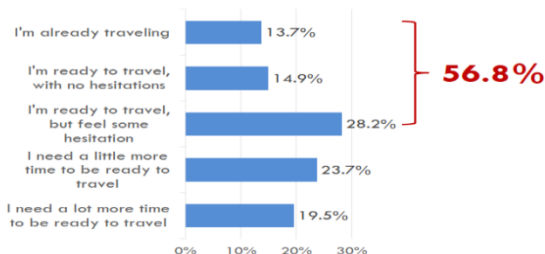
Destination Analysts
DO YOUR RESEARCH

Source: Destination Analysts National Anxiety Map

The same report shows increased optimism for the travel industry. Confidence in travelling improved significantly in January 2021. As of now, over half of Americans are ready to travel again. However, international travel is still seen as a high risk, with 68% reporting it is still somewhat unsafe or very unsafe to travel Internationally. Nearly half of Americans will not be likely to travel until receiving the vaccine. 62% of Americans are planning to get the vaccine.²⁵

TRAVEL STATE-OF-MIND

Question: When it comes to getting back out and traveling again, which best describes your current state of mind? (Select one)

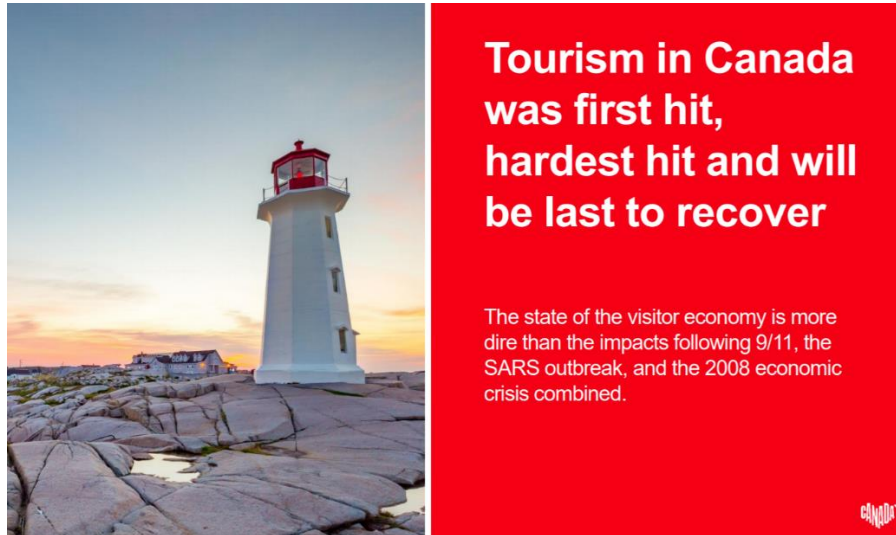


Destination Analysts
DO YOUR RESEARCH

Source: Destination Analysts

Post-Pandemic Travel

“Hotel demand may not reach pre-COVID-19 levels until 2023.” – McKinsey & Company, The Travel Industry Turned Upside Down, Sept. 2020¹⁸



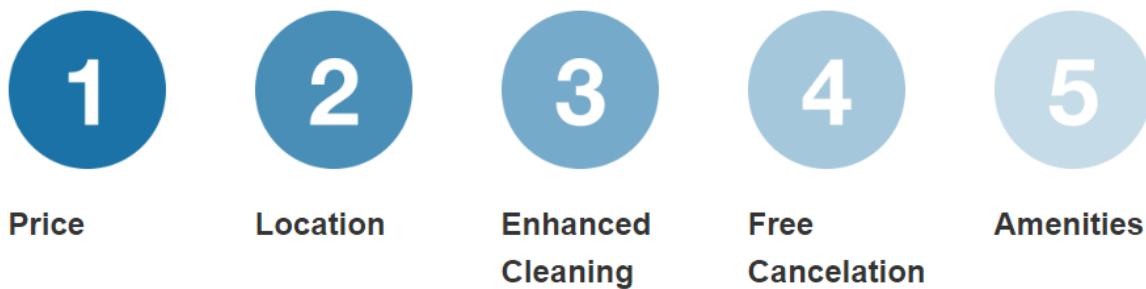
Source: Destination Canada Revisiting Tourism: Canada’s Visitor Economy One Year into the Global Pandemic, March 2021

80% of Canadians plan to travel once COVID-19 restrictions have been lifted³⁴ and there are a number of future travel trends that are likely to emerge in the wake of the COVID-19 pandemic.

A trend that appears to be taking form is a lean towards natural and rural destinations – much like the Yukon itself.

As of October 2020, **38% of Americans are looking to visit natural areas with outdoor activities, like nearby trails in 2021.** According to HomeToGo, an online vacation rental platform, searches for cabin rentals increased on their platform by +148% since the beginning of the pandemic.¹⁹

Also, enhanced cleaning has become a front-and-centre consideration for those mulling future travel plans. **45% of American travelers stated cleanliness as one of their top three decision-making factors** – making this a significantly higher priority for consumers since before the pandemic began.¹⁹



Source: HomeToGo, Looking Ahead: US Travel Behavior in 2021

Even with enhanced safety and cleanliness measures in place and vaccine distribution on the rise, tourism in Canada is still not projected to meet pre-pandemic levels in 2021. **Despite a forecast of \$64.5 billion in domestic tourism demand in a 2021 forecast, that number is still 21.3% shy of 2019 – although 30.5% above 2020.** Additionally, a 2021 forecast puts tourism export (foreign dollars into Canada) at \$3.4 billion. This is 8% shy of 2020, and 85.3% shy of 2019.³⁴

Domestic VS International²⁰

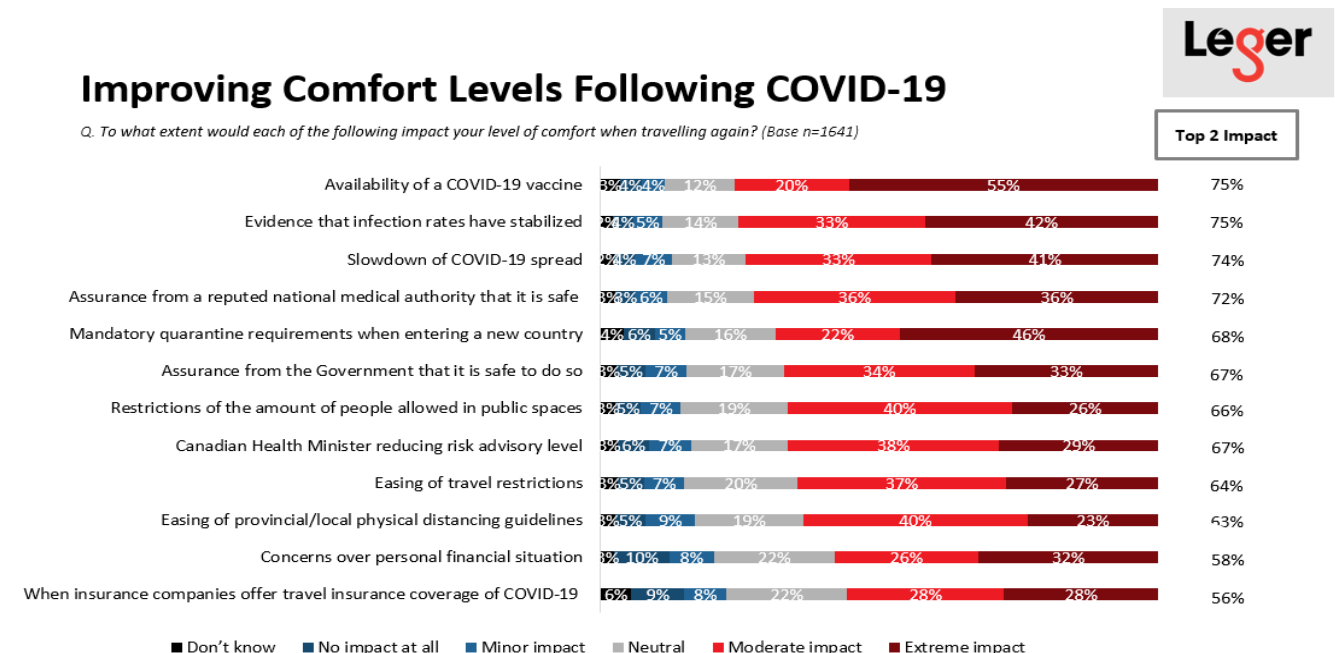
A December 2020 study found that **20% of Canadians say they are most looking forward to travelling domestically out of any post-pandemic activity**, while 42% indicated international travel was at the top of their post-pandemic activities list.

Across the income scale, roughly 20% of Canadians’ say domestic travel is at the top of their priority list, post-pandemic. Income level has a greater impact on desires for international travel. Of those who have a household income of \$150,00 or more, 64% say they’re eager to travel internationally.

As of February 2021, Canadians who are looking at travel dates 180+ days in the future are mostly searching for international destinations, whereas Canadians looking at travel days in the nearer future are searching more heavily for domestic destinations.³⁴

Travel Safety¹⁶

Leger’s own research from June 2020 indicated that the majority of Canadians will feel most comfortable travelling again upon the mass availability of a COVID-19 vaccine – **55% of Canadians feel this will have an extreme impact.** See the following graph:

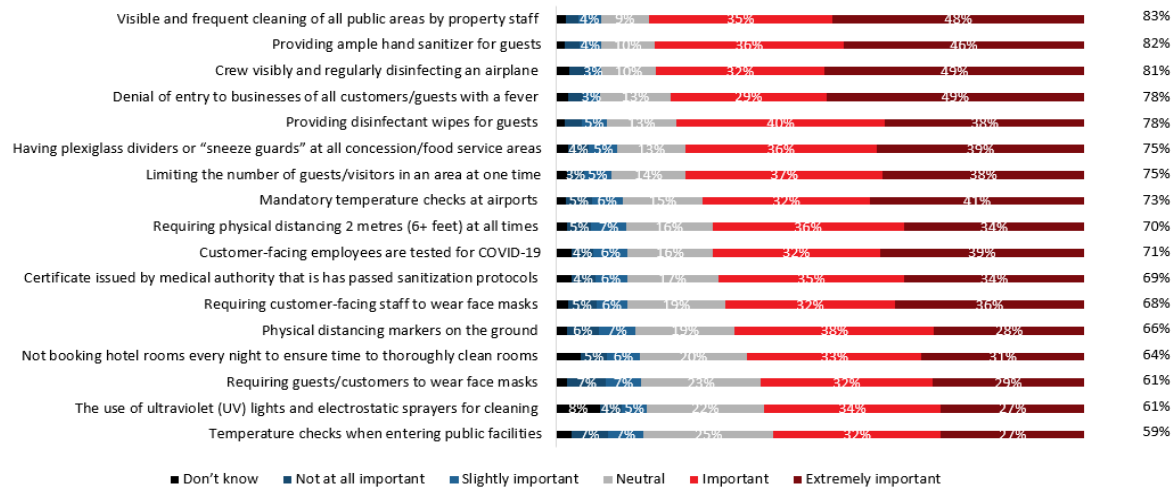


In the same study, when asked what can be done to increase comfort levels with travelling, Canadians emphasized their desire to see proper, routine cleanliness practices such as: disinfecting public spaces and the provision of hand sanitizer. **Canadians also feel customers with COVID-19 symptoms such as a fever should be denied access to travel and tourism services.** See the following graph:

Ways to Increase Comfort and Safety Moving Forward

Q. When considering your levels of comfort when travelling over the next **12 months**, how important are each of the following with respect to increasing your feelings of comfort and safety? (Base n=1995)

Top 2 Agree



British Columbia & Alberta: A Potential Yukon Travel Bubble ^{21,22,23,32}

Recently, discussion of a travel bubble with BC, Alberta and the Yukon has grown. As Yukon's only neighbouring province, British Columbia is an important market of potential tourists and guests of the territory.

BC residents' inclinations to travel domestically throughout Canada in the next 12 months is on an upwards trajectory.

In May 2020, one of the early months of the COVID-19 pandemic, 34% of British Columbians said they either definitely, or probably would consider traveling to other parts of Canada.

That number has risen. As of December 2020, **45% of BC residents intended to travel within Canada in the following 12 months**, which was up from 41% in November 2020. The same study found that 22% of BC residents intend to travel to the US and 17% to other international countries in the following 12 months.

As of December 2020, British Columbians appear more comfortable traveling within the borders of their own province. **86% of BC residents intend to travel to nearby communities within BC in 2021**, this up

from 80% in of residents who said the same in November 2020. 74% intend to travel further, but still in BC, up from 67% who said the same a month prior.

As of March 2021, 73% of BC residents are comfortable traveling to nearby communities and 59% of BC residents feel the same about travelling to communities within their province at-large, not necessarily in proximity.

Further, as of January 2021, **29% of British Columbians feel comfortable travelling to other parts of Canada – and as 2021 has progressed, that number has increased to 26% as of March.** Before the new year, only 20% of BC residents indicated they were comfortable travelling to other parts of Canada, further suggesting an upward trajectory.

87% of BC residents say they miss travelling inside Canada, while 78% miss travelling outside the country.

As for Alberta, as of March 2021, **23% of the province’s residents strongly feel safe traveling to other provinces and territories in Canada,** while 30% somewhat feel safe doing so – at total of 53%. This is consistent with attitudes Albertans held even in October 2020 when 51% felt strongly or somewhat safe travelling to another province or territory. Currently, 30% of Albertans strongly or somewhat feel unsafe doing the same.

Rural Albertans (65%) are currently more likely to feel safe travelling to other provinces and territories in Canada than urban Albertans (48%).

When it comes to travel within their own province, more Albertans feel comfortable. **83% of Alberta residents feel strongly or somewhat safe traveling to communities near them.** 73% feel the same about travelling to communities within their province at-large, not necessarily in proximity.

United States: Yukon’s Largest Market

In 2018, **62%—305,000—of Yukon visitors were from the United States.** Nearly one-third of those visitors came from neighbouring Alaska. Comparatively, 28% of all Yukon’s visitors in 2018 arrived from other parts of Canada. Most tourists (77%) arrived by car/RV, and (70%) stayed overnight. Excluding the cost of travel packages, American visitors accounted for \$61 million of spending in Yukon in 2018 – with an average of \$470 in spending per party.²⁶

As of February 2021, 35% of Americans are currently in the process of planning their next trip. Those who already booked travel tend to be younger – approximately 50% are under 35-years-old. However, 71% of those over 57-years-old are also planning a vacation once things return to normal. 26% say they will likely stay in a hotel and 22% say will travel by air in the next three months. This increases to 60% and 53% respectively when thinking about six months down the line.

Will these travelers come back to Canada? Omnitrak’s TraveltrakAmerica surveys 168,000 American households each year. This survey has tracked American interest in Canadian travel over the past three years. In most years, interest in Canadian travel ranges from 15% to 16%. Since the onset of the COVID-19 pandemic, the number of Americans interested in Canadian travel has remained consistent with pre-pandemic levels, while interest international travel has dropped significantly.²⁸

However as of March 2021, Both Prime Minister Justin Trudeau and President Joe Biden maintain that now is not the time to reopen the border. Yet, New York congressman Brian Higgins believes it should be possible to reopen the border by July 4, 2021. Higgins has even written a letter to President Biden encouraging a gradual easing of the border restrictions, and a partial reopening by the end of May 2021.³⁷

As of February 2021, 43% of American travelers had winter trips planned for early 2021. 44% of those travelers plan on going to beach destinations and **24% to more remote ski spots.**³⁵

Overall, Americans are eager to jet set once more. As of March 2021, optimism about the end of the pandemic is at its highest in the United States since the COVID-19 pandemic began a full year previously and is up 40 percentage points since the beginning of 2021. **60% of Americans believe things will get better in the next month.** In March alone, over 70% of American travelers dreamt of or planned travel. The numbers of leisure trips Americans are reporting they will take in 2021 has also increased. However, COVID-19 continues to be top-of-mind for potential travelers. **43% of Spring Break travelers in the United States remain very concerned about contracting the virus on their trip.**³³

Germany – A Key Yukon Market

In 2018, 8,194 German visitors to the Yukon accounted for **17% of all visitors.** 29% of these tourists arrived as part of a travel package – an average of \$7,771 spent per party. Excluding those packages, total overseas visitors to the Yukon spent over \$15 million dollars – an average \$860 per party. This is over 80-points higher per party when compared to the American visitors.

However, **German recovery may move slower than American or Canadian recovery.** Current local restrictions in Germany are significantly more restrictive than in the United States. Restrictions include²⁹:

- A minimum distance of 1.5 meters to other people in public
- Obligatory FFP2 or KN95 face masks in public transport or retail trade
- Compulsory masks in certain city centres or at highly frequented public places
- Private or public meetings are generally permitted only among members of one's own household with a maximum of one other person not living in the household
- Fines may be imposed without prior warning in case of violation of these obligation in some federal states
- Nightly curfews in areas with particularly high infection rates (10:00 p.m. until 5:00 a.m.)

Among the German population, sales of pre-booked package tours for summer 2021 are 68% below the previous year's level.³⁰ Further, just one-quarter of consumers around the world are planning international travel. Of that, 37% of the trip's purpose will be to visit friends and family.³¹

Within Europe at-large, interest in digital proof of a COVID-19 vaccination for travelers is growing. Many travel and tourism organizations have shown support for the European Commission's Digital Green Certificate initiative, which would mandate digital proof of a vaccination before travelling. European travel groups are putting pressure on governing bodies to see such an initiative implemented before the

summer travel season of 2021, as **54% of Europeans are planning to take a trip before the end of July 2021**, and 41% wish to travel to another European country.³⁶

COVID-19 Traveler Personas

Looking ahead, understanding the various types of pandemic-travelers will be important to understanding how to reach potential tourists. Using data from April 2020, the International Air Transport Association developed a passenger study to gain insights into how travelers feel about returning to travel.

The Impatient Innovator (10.7%):

- Wants to travel as soon as restrictions are lifted
- Isn't afraid of contracting COVID-19 while traveling
- Wants to be informed of safety measures while traveling
- Believes risk of catching COVID-19 on a plane is low
- Generally male, and often Canadian

The Young Early Majority (19.2%):

- Hesitant to travel right away but doesn't want to wait too long
- Above average concern of contracting COVID-19 in the travel process
- Wants to feel reassured by safety measures around travelling
- Generally, 18-35 years old, male and female

The Untroubled 55+ (15.8%):

- Wants to travel now, no matter what
- Less concerned about catching COVID-19, despite their advanced age
- Doesn't believe knowing about safety measures will make them feel safer
- Male, 55+, Often Canadian

The Wait-And-See X and Y Generation (20.4%):

- Willing to wait things out until travelling feels safer
- Concerned about quarantining upon arriving at destination or upon returning from travel
- Will feel safer travelling with the clear implementation of safety measures
- Would like to know about safety measures and would like hand sanitizer made available to them
- 34-55 years old, generally male

The Late Business Trip (15.9%):

- Postponing all business and air travel out of fear of contracting and spreading COVID-19
- Is concerned about the idea of quarantining upon return from travel
- Believes travel is a significant risk factor in catching COVID-19
- Isn't prone to be convinced to travel through increased safety measures on flights

- 18-54, rather male, typical business traveler

The Late Leisure Trip (18.1%):

- Will not risk catching COVID-19, will postpone all travel
- Believes travelling poses a significant health and safety risk amid the COVID-19 pandemic
- Doesn't believe safety implementations will reduce risk of contracting COVID-19 while travelling
- 18-54 years old, likely Canadian, generally female

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