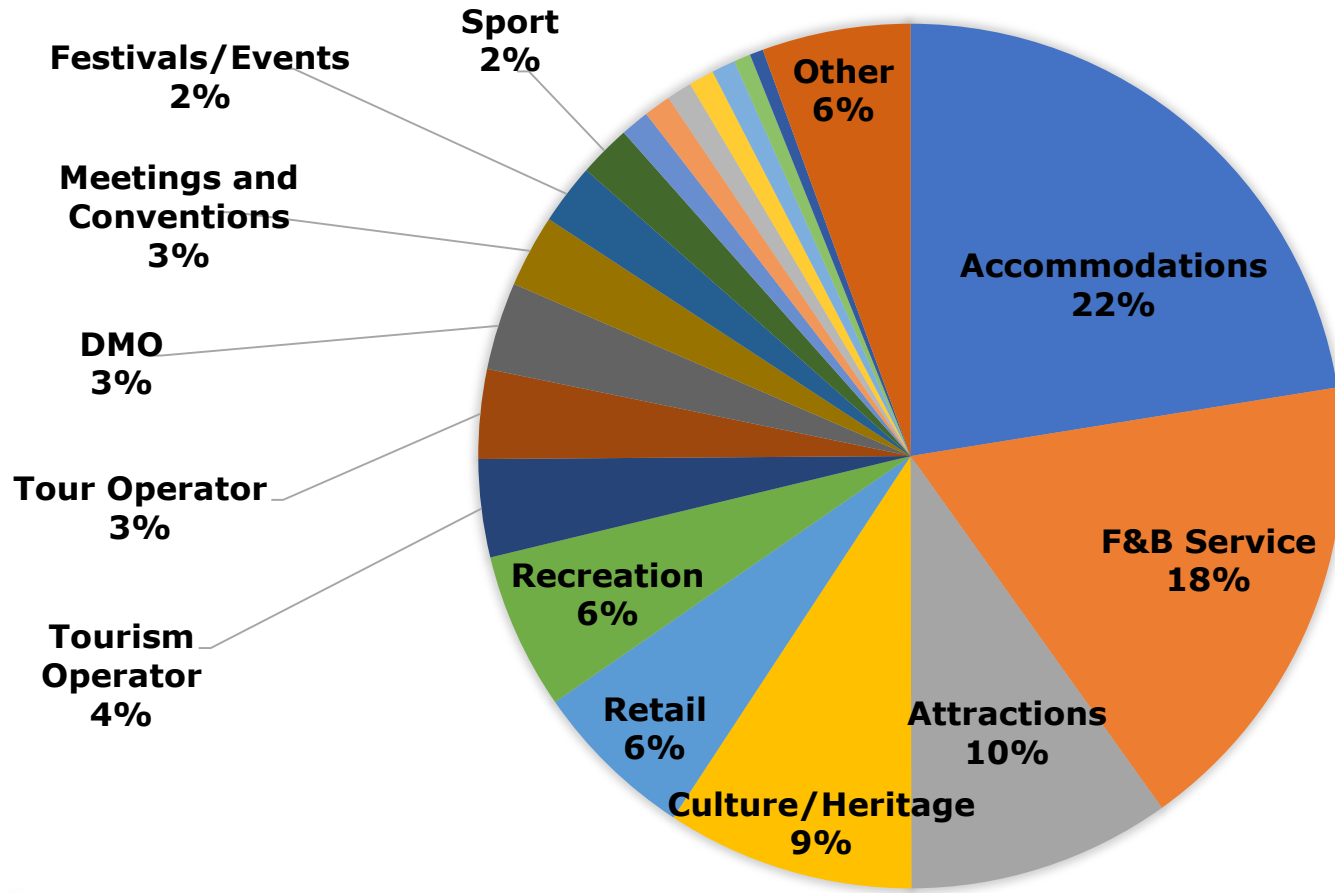




Ontario Regional Tourism Organizations
Covid-19 Survey Results
March 12-16 2020

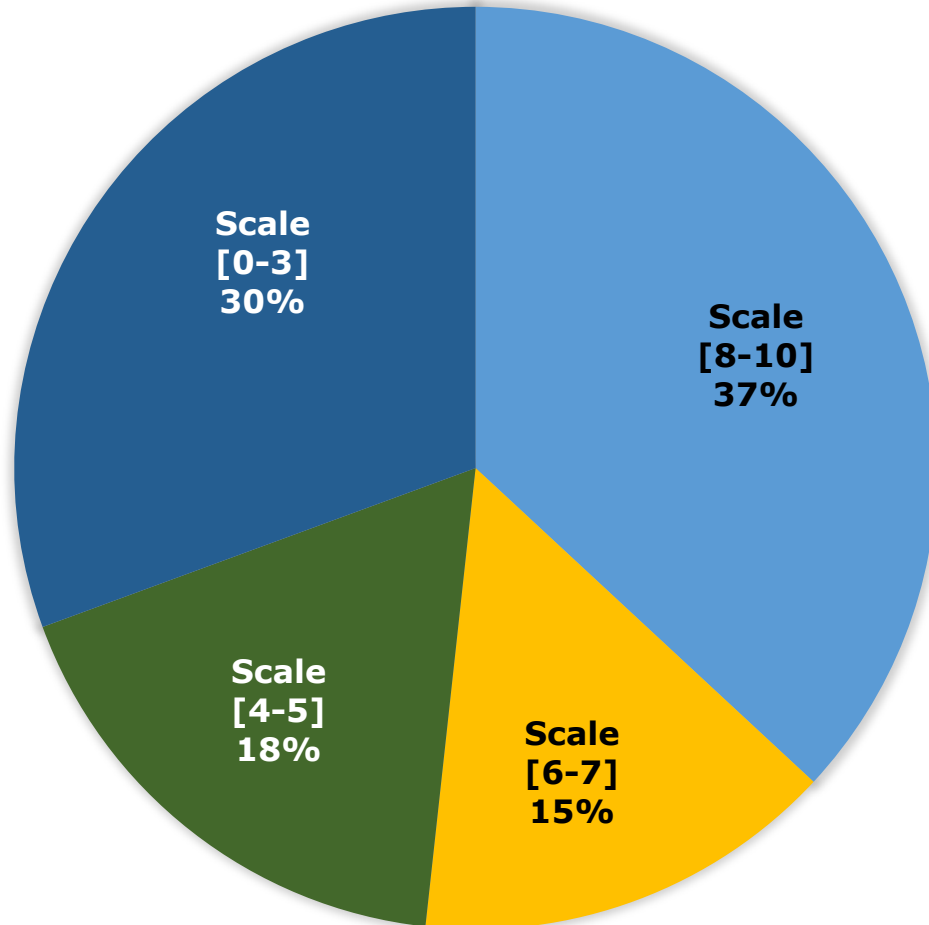
Tourism Sector 1,585 completed Surveys



Tourism Sector:	Count #	%
Accommodations	356	22.46%
F&B Service	280	17.67%
Attractions	156	9.84%
Culture/Heritage	147	9.27%
Retail	97	6.12%
Recreation	93	5.87%
Tourism Operator	58	3.66%
Tour Operator	53	3.34%
DMO	52	3.28%
Meetings and Conventions	43	2.71%
Festivals/Events	36	2.27%
Sport	31	1.96%
RTO	17	1.07%
BIA	16	1.01%
Education	15	0.95%
Sector Association	15	0.95%
Transportation	14	0.88%
Municipal Government	10	0.63%
Agriculture	8	0.50%
Other	88	5.55%
Total	1,585	100.00%

As of today, how has your tourism operation been impacted by COVID-19?

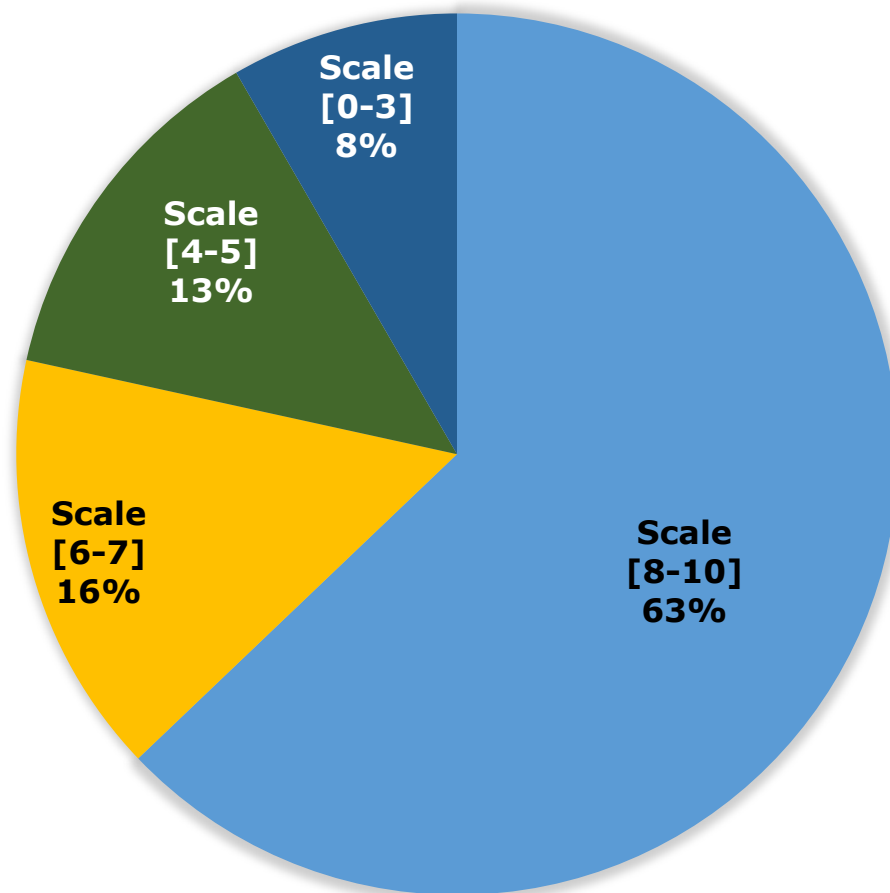
Scale 0 (no impact) to 10 (greatly impacted)



Scale	%
10	19.43%
9	5.36%
8	12.11%
7	7.57%
6	7.26%
5	12.43%
4	5.24%
3	5.68%
2	6.18%
1	4.61%
0	14.13%
5.53	Average

Looking ahead over the next 3 months, how do you anticipate your business being impacted by COVID-19?

Scale 0 (no impact) to 10 (greatly impacted)



Scale	%
10	32.45%
9	12.52%
8	17.90%
7	9.93%
6	5.63%
5	10.12%
4	3.10%
3	3.10%
2	1.96%
1	1.01%
0	2.28%
7.61	Average

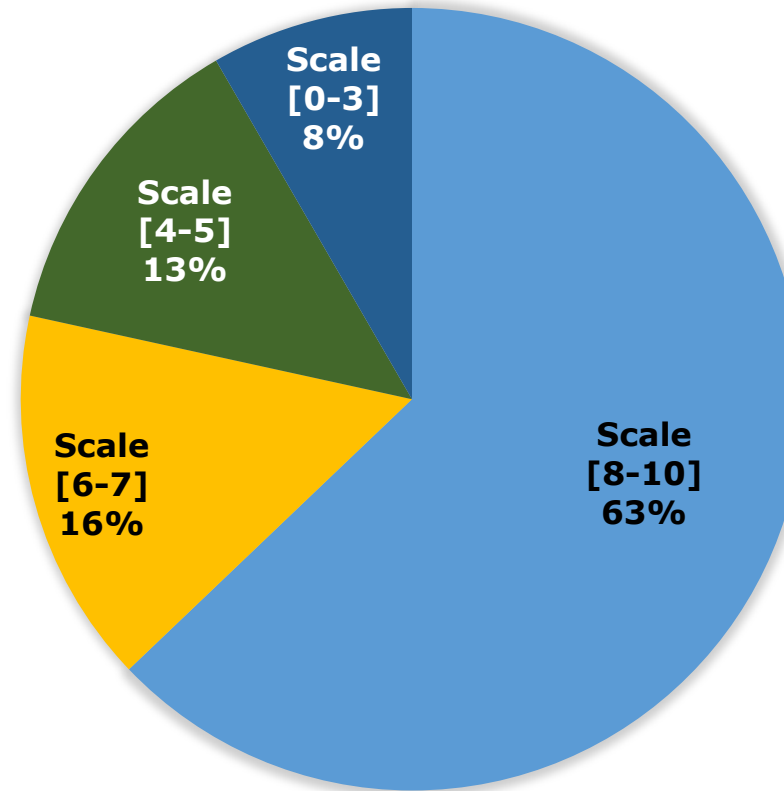
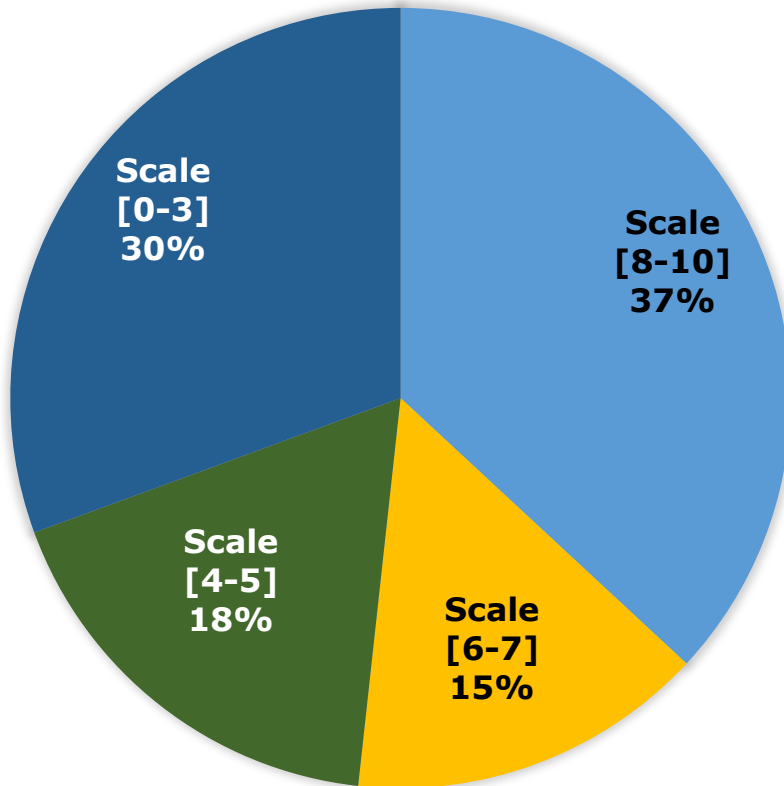
Impact Today

vs.

Anticipated Impact 3 Months

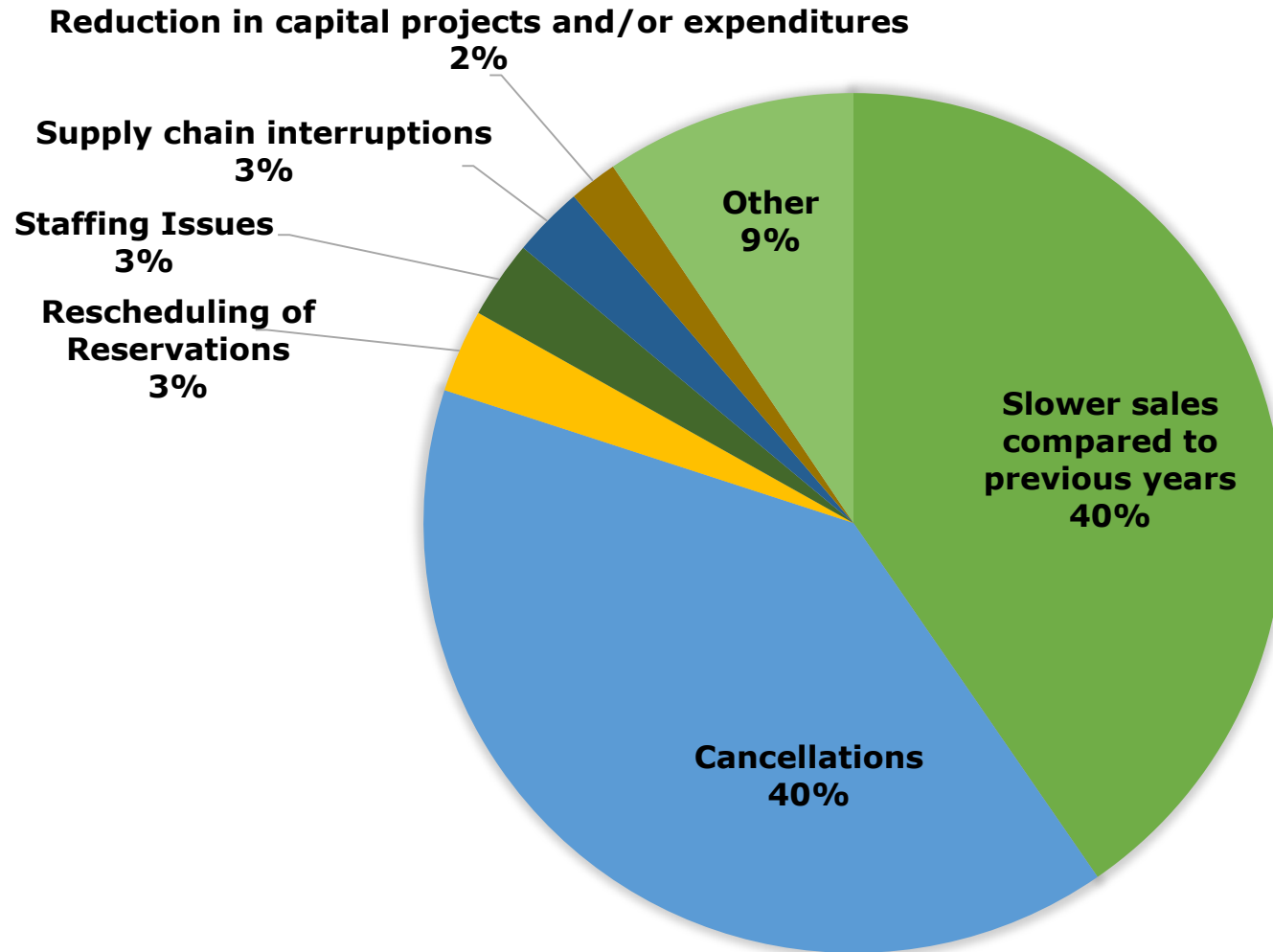
Scale 0 (no impact) to 10 (greatly impacted)

Scale	%
10	19.43%
9	5.36%
8	12.11%
7	7.57%
6	7.26%
5	12.43%
4	5.24%
3	5.68%
2	6.18%
1	4.61%
0	14.13%
5.53	Average



Scale	%
10	32.45%
9	12.52%
8	17.90%
7	9.93%
6	5.63%
5	10.12%
4	3.10%
3	3.10%
2	1.96%
1	1.01%
0	2.28%
7.61	Average

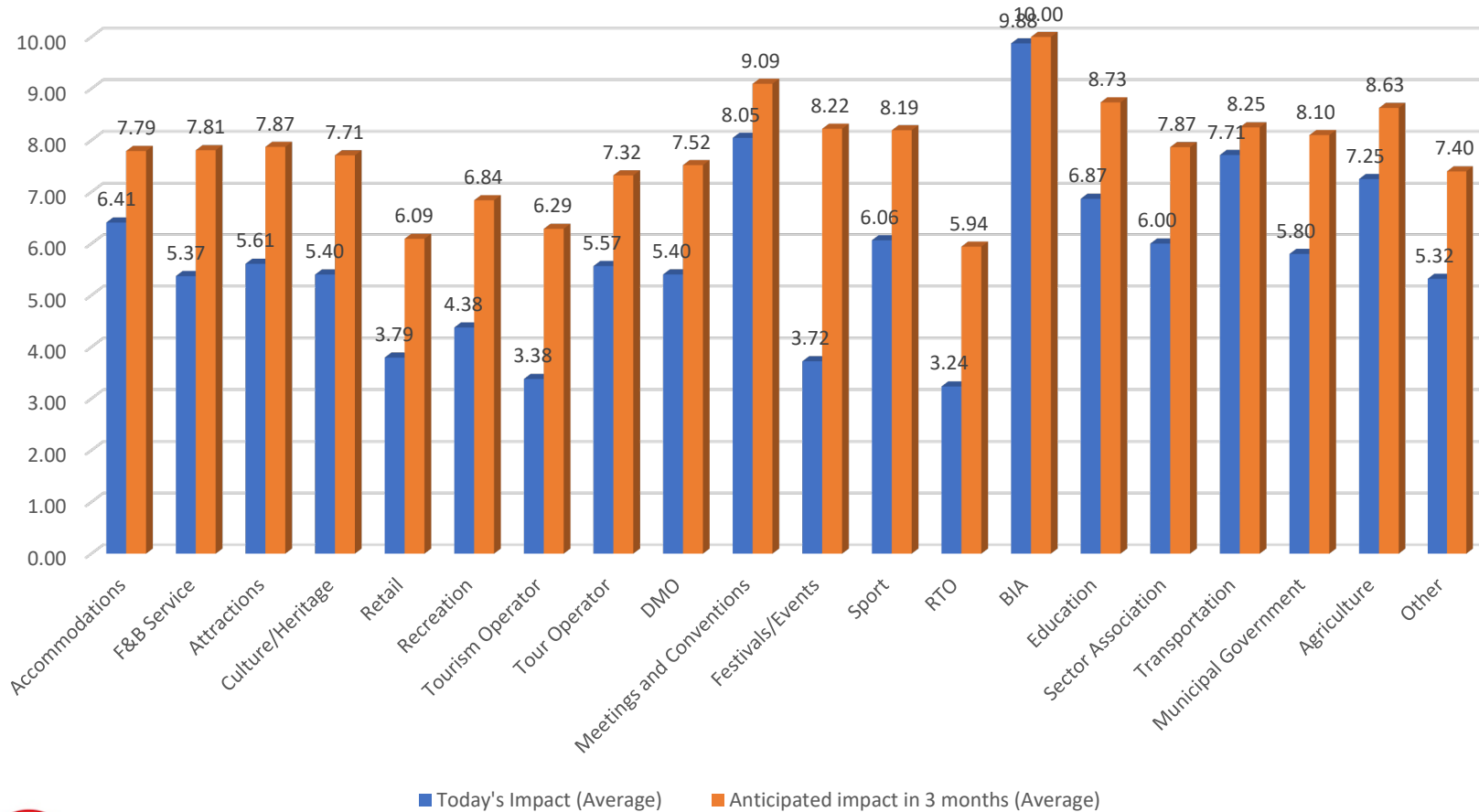
What has been the main impact to your tourism operation?



Impact	%
Slower sales compared to previous years	40.39%
Cancellations	39.61%
Rescheduling of Reservations	3.13%
Staffing Issues	2.93%
Supply chain interruptions	2.67%
Reduction in capital projects and/or expenditures	1.82%
Other	9.45%

Impact Today vs. Anticipated impact 3 months by Sector

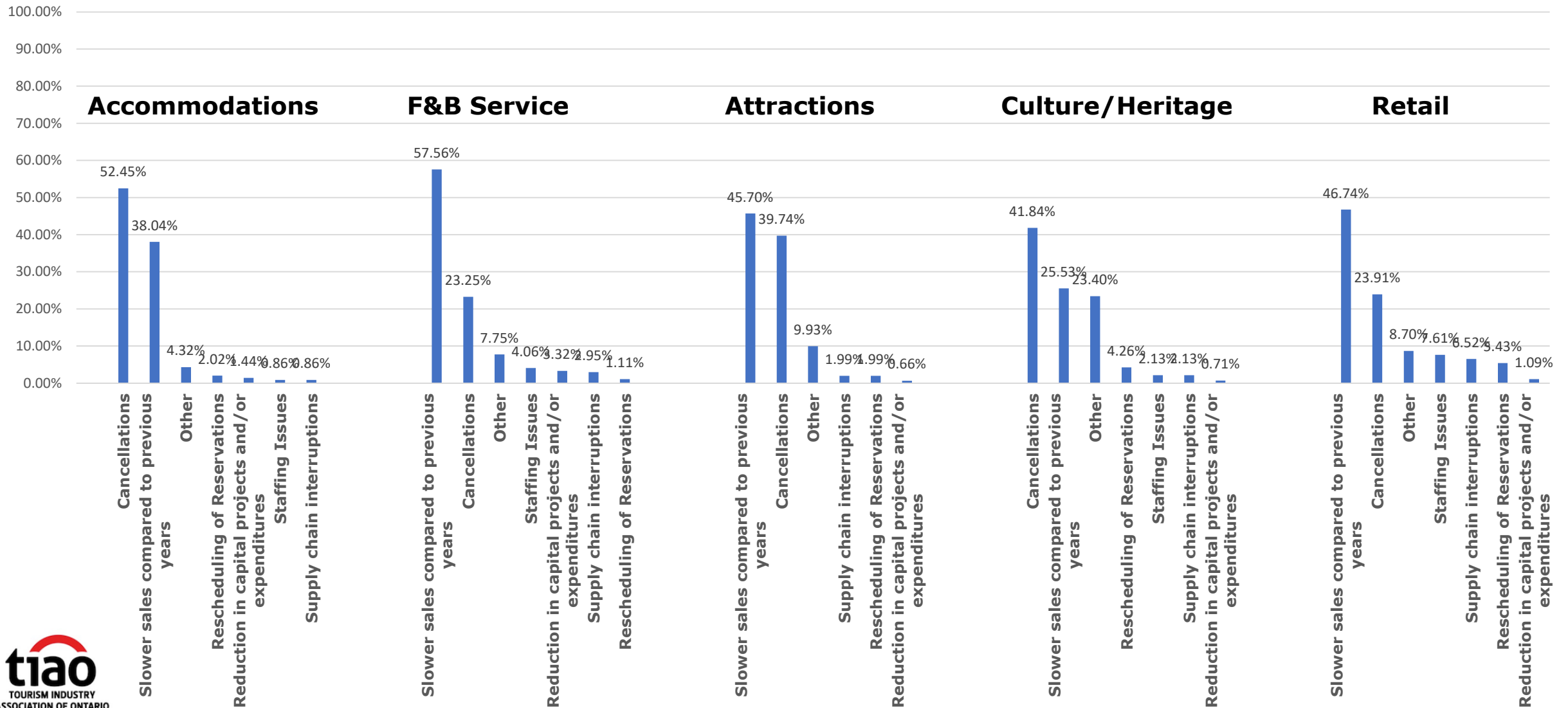
Scale 0 (no impact) to 10 (greatly impacted)



Sector:	Today's Impact (Average)	Anticipated impact in 3 months (Average)
Accommodations	6.41	7.79
F&B Service	5.37	7.81
Attractions	5.61	7.87
Culture/Heritage	5.40	7.71
Retail	3.79	6.09
Recreation	4.38	6.84
Tourism Operator	3.38	6.29
Tour Operator	5.57	7.32
Destination Marketing Organizations	5.40	7.52
Meetings and Conventions	8.05	9.09
Festivals/Events	3.72	8.22
Sport	6.06	8.19
Regional Tourism Organizations	3.24	5.94
Business Improvement Areas	9.88	10.00
Education	6.87	8.73
Sector Association	6.00	7.87
Transportation	7.71	8.25
Municipal Government	5.80	8.10
Agriculture	7.25	8.63
Other	5.32	7.40

What has been the main impact to your tourism operation by Sector?

(Accommodations, F&B Service, Attractions, Culture/Heritage, Retail)



What has been the main impact to your tourism operation by Sector?

(Accommodations, F&B Service, Attractions, Culture/Heritage, Retail)

Accommodations	Value #	%
Cancellations	182	52.45%
Slower sales compared to previous years	132	38.04%
Other	15	4.32%
Rescheduling of Reservations	7	2.02%
Reduction in capital projects and/or expenditures	5	1.44%
Staffing Issues	3	0.86%
Supply chain interruptions	3	0.86%

F&B Service	Value #	%
Slower sales compared to previous years	156	57.56%
Cancellations	63	23.25%
Other	21	7.75%
Staffing Issues	11	4.06%
Reduction in capital projects and/or expenditures	9	3.32%
Supply chain interruptions	8	2.95%
Rescheduling of Reservations	3	1.11%

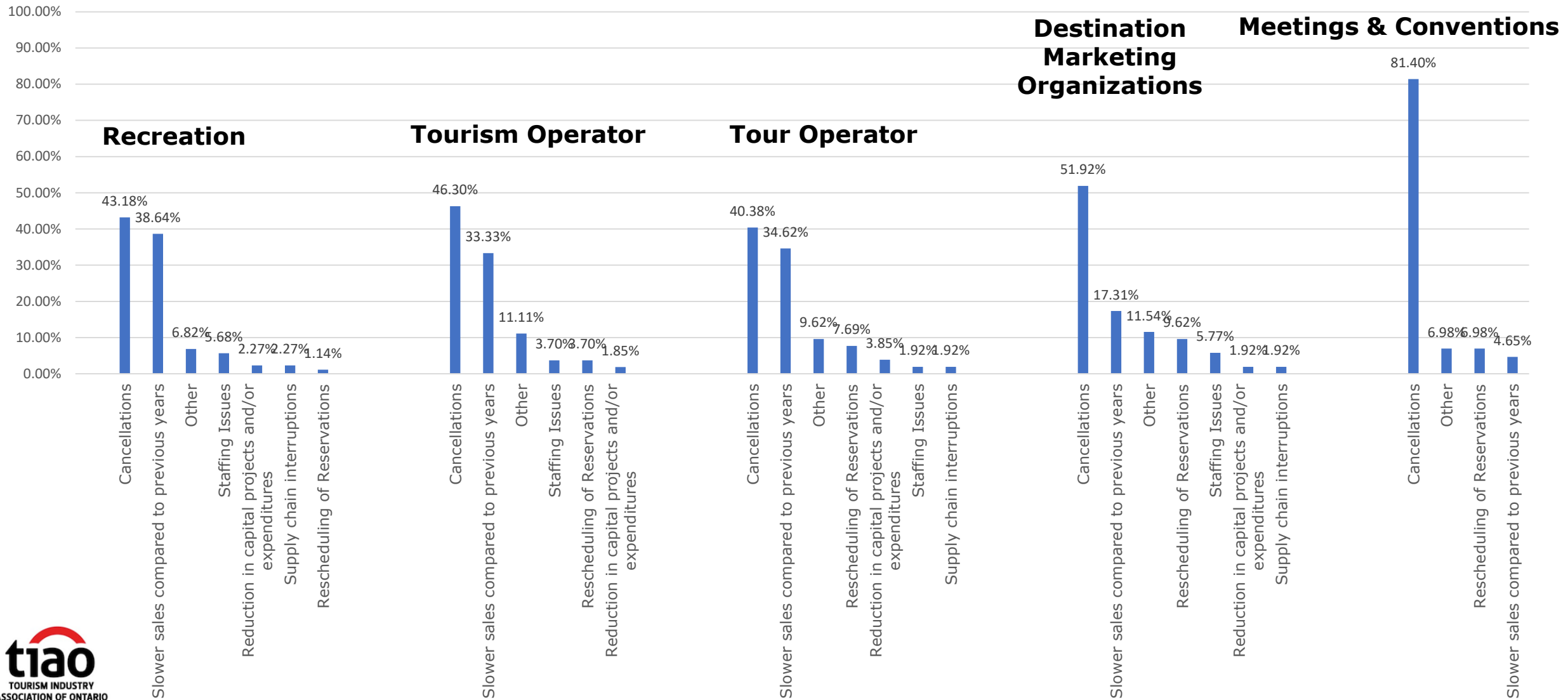
Attractions	Value #	%
Slower sales compared to previous years	69	45.70%
Cancellations	60	39.74%
Other	15	9.93%
Supply chain interruptions	3	1.99%
Rescheduling of Reservations	3	1.99%
Reduction in capital projects and/or expenditures	1	0.66%

Culture /Heritage	Value #	%
Cancellations	59	41.84%
Slower sales compared to previous years	36	25.53%
Other	33	23.40%
Rescheduling of Reservations	6	4.26%
Staffing Issues	3	2.13%
Supply chain interruptions	3	2.13%
Reduction in capital projects and/or expenditures	1	0.71%

Retail	Value #	%
Slower sales compared to previous years	43	46.74%
Cancellations	22	23.91%
Other	8	8.70%
Staffing Issues	7	7.61%
Supply chain interruptions	6	6.52%
Rescheduling of Reservations	5	5.43%
Reduction in capital projects and/or expenditures	1	1.09%

What has been the main impact to your tourism operation by Sector?

(Recreation, Tourism Operator, Tour Operator, DMO, Meetings and Conventions)



What has been the main impact to your tourism operation by Sector?

(Recreation, Tourism Operator, Tour Operator, DMO, Meetings and Conventions)

Recreation	Value #	%
Cancellations	38	43.18%
Slower sales compared to previous years	34	38.64%
Other	6	6.82%
Staffing Issues	5	5.68%
Reduction in capital projects and/or expenditures	2	2.27%
Supply chain interruptions	2	2.27%
Rescheduling of Reservations	1	1.14%

Tourism Operator	Value #	%
Cancellations	25	46.30%
Slower sales compared to previous years	18	33.33%
Other	6	11.11%
Staffing Issues	2	3.70%
Rescheduling of Reservations	2	3.70%
Reduction in capital projects and/or expenditures	1	1.85%

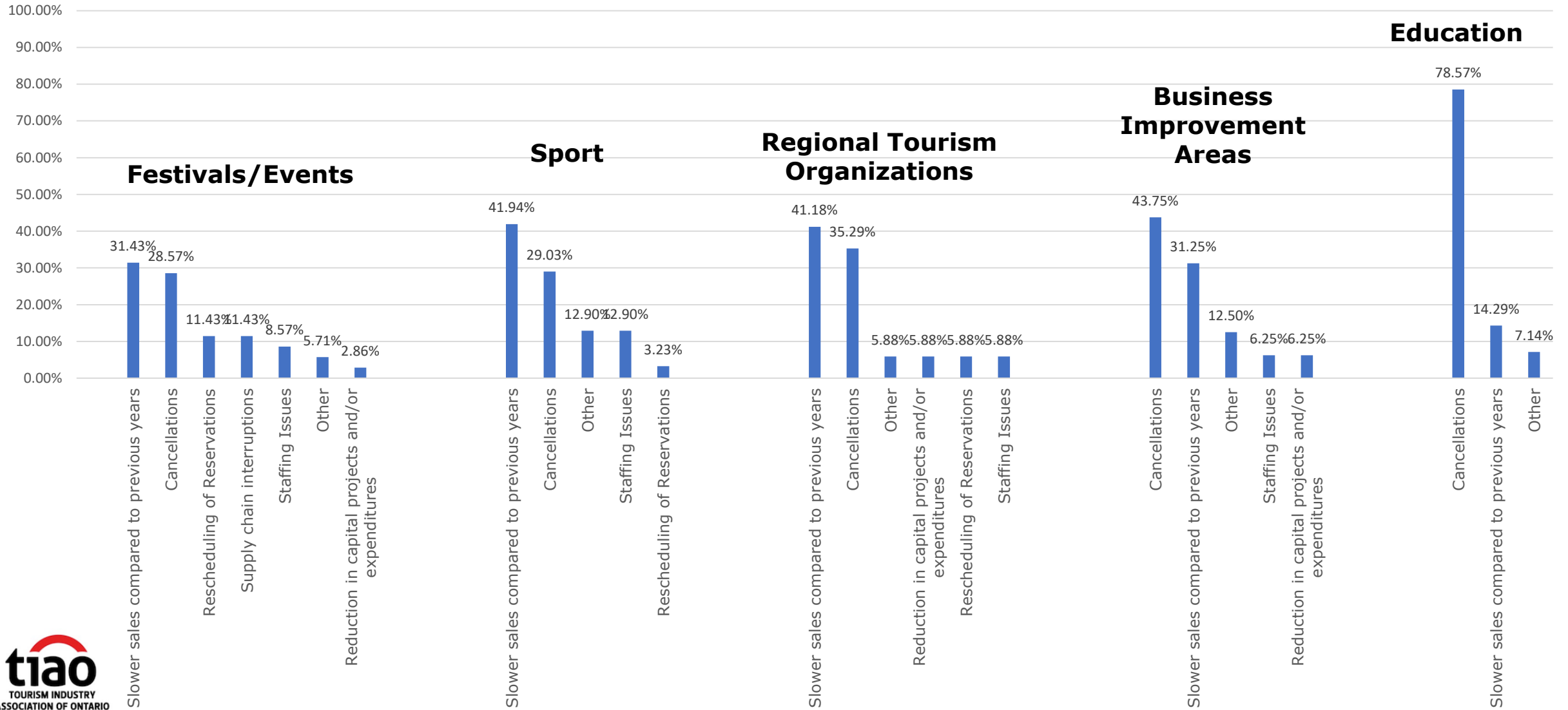
Tour Operator	Value #	%
Cancellations	21	40.38%
Slower sales compared to previous years	18	34.62%
Other	5	9.62%
Rescheduling of Reservations	4	7.69%
Reduction in capital projects and/or expenditures	2	3.85%
Staffing Issues	1	1.92%
Supply chain interruptions	1	1.92%

DMO	Value #	%
Cancellations	27	51.92%
Slower sales compared to previous years	9	17.31%
Other	6	11.54%
Rescheduling of Reservations	5	9.62%
Staffing Issues	3	5.77%
Reduction in capital projects and/or expenditures	1	1.92%
Supply chain interruptions	1	1.92%

Meetings and Conventions	Value #	%
Cancellations	35	81.40%
Other	3	6.98%
Rescheduling of Reservations	3	6.98%
Slower sales compared to previous years	2	4.65%

What has been the main impact to your tourism operation by Sector?

(Festivals & Events, Sport, RTO, BIA, Education)



What has been the main impact to your tourism operation by Sector?

(Festivals & Events, Sport, RTO, BIA, Education)

Festivals & Events	Value #	%
Slower sales compared to previous years	11	31.43%
Cancellations	10	28.57%
Rescheduling of Reservations	4	11.43%
Supply chain interruptions	4	11.43%
Staffing Issues	3	8.57%
Other	2	5.71%
Reduction in capital projects and/or expenditures	1	2.86%

Sport	Value #	%
Slower sales compared to previous years	13	41.94%
Cancellations	9	29.03%
Other	4	12.90%
Staffing Issues	4	12.90%
Rescheduling of Reservations	1	3.23%

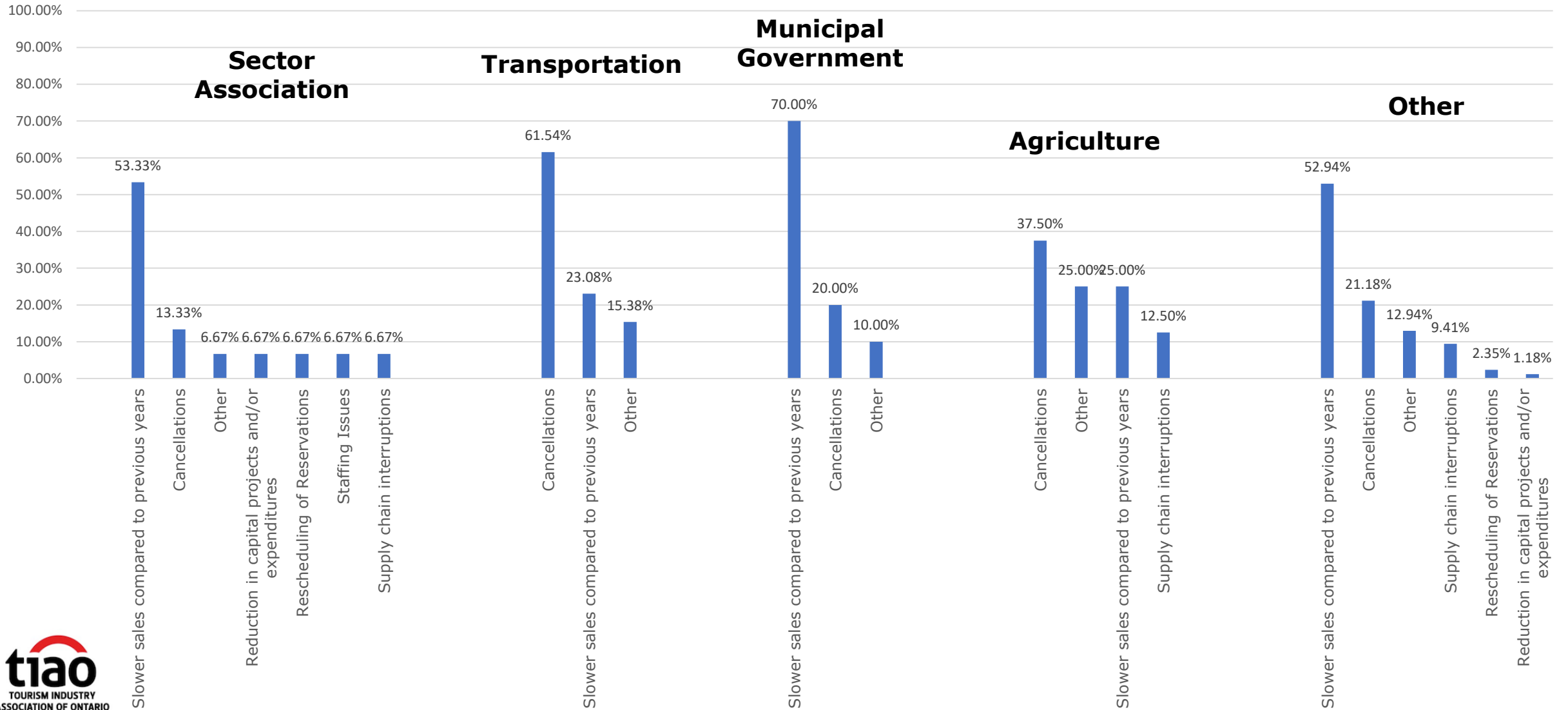
Regional Tourism Organizations	Value #	%
Slower sales compared to previous years	7	41.18%
Cancellations	6	35.29%
Other	1	5.88%
Reduction in capital projects and/or expenditures	1	5.88%
Rescheduling of Reservations	1	5.88%
Staffing Issues	1	5.88%

BIA	Value #	%
Cancellations	7	43.75%
Slower sales compared to previous years	5	31.25%
Other	2	12.50%
Staffing Issues	1	6.25%
Reduction in capital projects and/or expenditures	1	6.25%

Education	Value #	%
Cancellations	11	78.57%
Slower sales compared to previous years	2	14.29%
Other	1	7.14%

What has been the main impact to your tourism operation by Sector?

(Sector Association, Transportation, Municipal Government, Agriculture, Other)



What has been the main impact to your tourism operation by Sector?

(Sector Association, Transportation, Municipal Government, Agriculture, Other)

Sector Association	Value #	%
Slower sales compared to previous years	8	53.33%
Cancellations	2	13.33%
Other	1	6.67%
Reduction in capital projects and/or expenditures	1	6.67%
Rescheduling of Reservations	1	6.67%
Staffing Issues	1	6.67%
Supply chain interruptions	1	6.67%

Transportation	Value #	%
Cancellations	8	61.54%
Slower sales compared to previous years	3	23.08%
Other	2	15.38%

Municipal Government	Value #	%
Slower sales compared to previous years	7	70.00%
Cancellations	2	20.00%
Other	1	10.00%

Agriculture	Value #	%
Cancellations	3	37.50%
Other	2	25.00%
Slower sales compared to previous years	2	25.00%
Supply chain interruptions	1	12.50%

Other	Value #	%
Slower sales compared to previous years	45	52.94%
Cancellations	18	21.18%
Other	11	12.94%
Supply chain interruptions	8	9.41%
Rescheduling of Reservations	2	2.35%
Reduction in capital projects and/or expenditures	1	1.18%