



# DESTINATION CANADA 2020 Global Tourism Watch & Travel Intentions Survey, Highlights

November 2020

TOURISM  
NOVA SCOTIA 

# GLOBAL TOURISM WATCH METHODOLOGY

- Online survey with 9,059 respondents from across Canada (excluding the Territories).
- Conducted in **November 2020**.
- ***In-Province Travel*** and ***Out-of-Province Travel*** questions focused on pleasure / vacation travel:
  - Trips of 2 or more nights, where at least 1 night is spent in paid accommodations, including trips to visit friends and relatives and combined business-pleasure trips.
  - Excludes travel solely for business purposes, cottage trips, and trips for personal reasons (e.g., to attend weddings/funerals, for medical reasons, etc.).
- All ***Tourism Sentiment*** and ***COVID-19*** questions were asked of a sample representative of the general Canadian population.
  - Results are reported for the most recent (November) wave of the survey; results from previous waves in June, July, and August are only indicated where notable change has occurred.

# EXECUTIVE SUMMARY

# PERCEPTIONS OF TOURISM

- A large majority of both Canadians and Atlantic Canadians say that **tourism is important for the country's economy**, and that visitors – foreign and domestic – are good for Canada.

# TRAVEL INTENTIONS

- Only one-third of Canadians and Atlantic Canadians say they're likely to take an **overnight vacation out-of-province in the next year**, with even smaller numbers likely to travel overnight within their own province.
- Only a minority of Canadians – no more than 4 in 10 – intend to travel **domestically** in 2021, while fewer than one-quarter intend to travel **internationally**. Among Nova Scotians, no more than 3 in 10 intend to travel domestically in 2021, and only 1 in 10 intend to travel internationally.
- There is **moderate, pent-up demand for travel**, with a small majority of Canadians (and half of Atlantic Canadians) saying they can't wait to get out and travel again. However, this demand is mostly focused on re-visiting **familiar destinations** and experiencing **outdoor attractions and activities**.
- **Mid-priced hotels** are likely to be the most sought-after type of accommodation once travel restrictions are eased. Among Atlantic Canadians, staying with **friends and relatives** is also likely to be one of the most popular accommodation options.

# TRAVEL INTENTIONS – NOVA SCOTIA

- Among Canadians, 2 in 10 are **considering a trip to Nova Scotia** in the next year, and 3 in 20 are **actively planning** one. Nova Scotia is on par with Quebec and Ontario as the third-most popular provincial destination, after British Columbia and Alberta.
- Nova Scotia is the 4<sup>th</sup>-highest rated province in the country as a place Canadians would **recommend for a vacation**. Nova Scotia is rated below Newfoundland and Labrador and Prince Edward Island, but above New Brunswick.
- Nova Scotia is ranked 5<sup>th</sup> among provinces as **measured by its appeal**. It is also the most appealing destination in Atlantic Canada.
- Cape Breton and the Annapolis Valley are the **most popular in-province destinations** being *considered* for next year by Nova Scotia pleasure travellers, however, fewer than 2 in 10 are *actively planning* such a trip.

# COVID-19 AND TRAVEL

- Two in 10 Canadians, and one-quarter of Nova Scotians, do not intend to travel to other parts of the country until they have a **vaccine**. Four in 10 Canadians, and nearly half of Nova Scotians, say they will not travel internationally without a vaccine.
- **Natural attractions**, and sampling **local food and drink**, hold the most interest among potential travellers. Physically-demanding activities, as well as those likely to involve crowds, are of least interest.
- **Health and safety** concerns are the most important consideration for Canadian and Atlantic Canadian travellers, both as a barrier to travel within the country, and as a factor in choosing a travel destination.
- Other top-of-mind factors in choosing where to travel are **quarantine restrictions** for entry into a particular province (and re-entry into one's home province), and the **number of COVID-19 cases** at a given destination.

# PERCEPTIONS OF TOURISM



# TOURISM SENTIMENT

	Canada	NS	Other ATL
Importance of tourism industry to Canada's economy	84	92	90
SAMPLE SIZE	9059	400	1051

- In your opinion, how important is the tourism industry to Canada's economy?
- Table shows % selecting very or somewhat important.

	Canada	NS	Other ATL
Visitors from other countries are good for Canada	79	76	77
Canadian visitors travelling domestically are good for Canada	82	86	84
SAMPLE SIZE	9059	400	1051

- To what extent do you agree or disagree with each of the following statements?
- Table shows % selecting strongly or somewhat agree.
- The vast majority of Atlantic Canadians, and a large majority of Canadians, say the tourism industry is important to the country's economy.
- Large majorities also agree that domestic visitors, and to a lesser degree international visitors, are good for Canada.

# TRAVEL INTENTIONS

# LIKELIHOOD TO TRAVEL

IN-PROVINCE	Canada	NS	Other ATL
Shorter trip of 1-3 nights	26	26	30
Longer trip of 4+ nights	14	10	14
SAMPLE SIZE	4531	200	601

OUT-OF-PROVINCE	Canada	NS	Other ATL
Shorter trip of 1-3 nights	33	33	34
Longer trip of 4+ nights	29	25	29
SAMPLE SIZE	4528	200	600

- Realistically, how likely are you to take a vacation trip [within /outside] of your province ... in the next year?
- Table shows % selecting Definitely or Very likely.
- Only moderate minorities of Canadians, and Atlantic Canadians – no more than one-third in each case – say they’re likely to take an overnight vacation trip in the next year.
- Whether travelling in-province or out-of-province, people say they’re more likely to take shorter trips of 1-3 nights than longer trips of 4 or more nights.

# TRAVEL INTENTIONS, TIMING

	Canada				Nova Scotia			
	Earlier	2021	Later/DK	Vaccine	Earlier	2021	Later/DK	Vaccine
Other communities near me	35	33	18	15	50	19	18	13
Other parts of my province	32	39	16	14	58	23	12	8
Other parts of Canada	18	40	21	21	19	29	26	26
The United States	9	24	31	38	6	9	38	49
Other countries	11	22	31	37	5	10	40	45
SAMPLE SIZE	9059				400			

- Please indicate when you would be interested in travelling to the following destinations.
- Table shows % selecting each time period, for each type of destination. DK = Don't know.
- Among Canadians, between 3-4 out of 10 would travel domestically in 2021, while fewer than one-quarter would travel internationally.
- Among Nova Scotians, fewer than 3 in 10 would travel domestically and only 1 in 10 would travel internationally.
- As many as 2 in 10 Canadians, and one-quarter of Nova Scotians, will not travel in other parts of their own country without a vaccine, and nearly one-third of Canadians and one-half of Nova Scotians will not travel internationally without a vaccine.

# ATTITUDES ABOUT TRAVEL

	Canada	NS	Other ATL
I miss travel. I can't wait to get out and travel again	61	49	53
I will visit and participate in outdoor attractions and activities	54	52	53
I will visit destinations that I know well or have visited before	52	55	57
I will only do one or two things per day to limit social interaction	49	51	51
I will visit new destinations that I have never visited before	44	34	37
I will spend less than I did on vacations pre-COVID-19	37	41	37
I will visit and participate in indoor attractions and activities	33	31	34
I will fill my days with as many attractions/activities as possible	30	27	29
I will spend more than I did on vacations pre-COVID-19	19	13	14
I feel safe travelling now	16	12	13
SAMPLE SIZE	9059	400	1051

- Thinking of your next vacation, as government restrictions related to COVID-19 are relaxed, how much do you agree or disagree with the following statements?
- Table shows % strongly or somewhat agreeing with each statement.
- There is pent up demand for travel, with more than half of Canadians and Atlantic Canadians saying they miss travel and are interested in visiting familiar destinations and outdoor attractions once again.
- There is less interest in visiting unfamiliar places and indoor attractions and activities.
- Fewer than 2 in 10 Canadians, and even fewer Atlantic Canadians, say they feel safe to travel.

# ACCOMMODATIONS

	Canada	NS	Other ATL
Mid-priced hotel / motel	42	47	46
Home of friends or relatives	29	45	41
Rented house, apartment or condominium (e.g., Airbnb)	28	32	27
Budget hotel / motel	22	20	22
Luxury hotel	21	15	16
Resort	19	21	18
Bed & Breakfast (B&B)	19	23	20
Camping or trailer/RV park	14	12	13
Own cottage or second home	8	10	10
Guest ranch, farm, or lodge	8	10	8
Hostel, university or school dormitory	6	4	3
SAMPLE SIZE	3830	175	516

- As government restrictions related to COVID-19 are relaxed, how likely are you to stay at the following accommodation types?
- Table shows % definitely or very likely to select each type of accommodation.
- Mid-priced hotels are the most popular form of accommodation, with more than 4 in 10 Canadians, and Atlantic Canadians, interested in this type of lodging as restrictions ease.
- Staying with friends and relatives is less popular among Canadians than Atlantic Canadians.
- The popularity of sharing accommodations is reflected in the fact that a significant minority select rented homes and apartments as an option for travel lodging.

# TRAVEL INTENTIONS – NOVA SCOTIA

# FUTURE TRAVEL, PLANNING

Province	% Next Year	% Active Planning
Newfoundland and Labrador	13	11
<b>Nova Scotia</b>	<b>20</b>	<b>14</b>
Prince Edward Island	17	13
New Brunswick	14	12
Quebec	21	14
Ontario	21	16
Manitoba	7	10
Saskatchewan	7	11
Alberta	27	17
British Columbia	36	18
Yukon	6	10
Northwest Territories	4	9
Nunavut	3	7

- Which destinations would you seriously consider visiting in the next year? (Select all)
  - Which of the following best describes your current situation when thinking about each of the following destinations for a vacation trip? Active planning includes those selecting gathering information, planning a visit, making arrangements, or already booked.
  - Among out-of-province pleasure travellers, excluding residents from each province.
  - Sample size varies by the region being evaluated, from 3475 to 4400.
- Two in 10 Canadian pleasure travellers are *considering* a visit to Nova Scotia *next year*, while 3 in 20 are *actively planning* one. This makes Nova Scotia the most favoured destination in Atlantic Canada, and on par with Quebec and Ontario. Alberta and British Columbia are the most favoured provincial destinations.



# NET PROMOTER SCORE

Province	Net Score
Newfoundland and Labrador	+31
<b>Nova Scotia</b>	<b>+15</b>
Prince Edward Island	+21
New Brunswick	-6
Quebec	-6
Ontario	-9
Manitoba	-50
Saskatchewan	-49
Alberta	-7
British Columbia	+31
Yukon	-1
Northwest Territories	+7
Nunavut	-7

- How likely are you to recommend each of the following vacation destinations to a friend, family member or colleague?
  - Among out-of-province travellers who have visited destination before.
  - Sample size varies by the region being evaluated.
  - Net Promoter Score is derived from an 11-point scale (0-10). Score is calculated by subtracting Detractors (0-6 rating) from Promoters (9-10 rating).
- Nova Scotia is the 4<sup>th</sup>-highest rated province in the country as a place Canadians would *recommend to friends and family* as a vacation destination. In Atlantic Canada, Nova Scotia is rated below Newfoundland and Labrador and Prince Edward Island, but above New Brunswick.

# MOST APPEALING DESTINATIONS

	Canada	NS
Newfoundland and Labrador	5	21
<b>Nova Scotia</b>	<b>10</b>	--
Prince Edward Island	6	21
New Brunswick	5	11
Quebec	11	6
Ontario	14	17
Manitoba	2	1
Saskatchewan	2	1
Alberta	15	10
British Columbia	26	9
Yukon	6	1
Northwest Territories	1	1
Nunavut	1	0
SAMPLE SIZE	3694	171

- Earlier, you mentioned you would seriously consider visiting the following provinces in the next year. Which place most appeals to you?
- Table shows % selecting each province.

- Nova Scotia is ranked 5<sup>th</sup> among provinces as measured by its overall *appeal*, with one in 10 Canadian pleasure travellers saying it appeals as a vacation destination. It is also the most appealing destination in Atlantic Canada.
- Pleasure travellers living in Nova Scotia rate Prince Edward Island and Newfoundland and Labrador as having the most appeal.

# IN-PROVINCE, FUTURE TRAVEL

NS Region	Next Year	Active Planning
Cape Breton	42	16
Annapolis Valley	39	11
Halifax Waterfront	36	13
Lunenburg	33	12
Bay of Fundy	31	7
Peggy's Cove	28	7
SAMPLE SIZE	200	126

- Which destinations would you seriously consider visiting in the next year? (Select all)
  - Which of the following best describes your current situation when thinking about each of the following destinations for a vacation trip? Active planning includes those selecting gathering information, planning a visit, making arrangements, or already booked.
  - Among in-province (Nova Scotian) pleasure travellers. Table shows % selecting each region.
- Among Nova Scotian pleasure travellers, Cape Breton is the region most likely to be under *consideration* for travel in the *next year*, followed by Annapolis Valley, Halifax, and Lunenburg.
  - Fewer than two in 10 Nova Scotian vacationers are *actively planning* future travel somewhere within the province.

# COVID-19 AND TRAVEL

# ACTIVITIES – HIGHEST INTEREST

	Canada	NS	Other ATL
Hiking or walking in nature	52	49	52
Natural attractions like mountains or waterfalls	52	55	54
Trying local food and drink	50	55	53
Nature parks	45	43	46
Viewing wildlife or marine life	39	46	42
Historical, archaeological or world heritage sites	38	40	36
Fall colours	35	45	40
City green spaces like parks or gardens	34	34	32
Northern lights	33	39	32
Food and drink festivals or events	33	37	37
SAMPLE SIZE	9059	400	1051

- Thinking of your next vacation as government restrictions related to COVID-19 are relaxed, what activities or places are you interested in while on vacation?
- Table shows % selecting each activity.
- Outdoor activities and natural attractions hold the most interest for Canadians, and Atlantic Canadians, as travel restrictions are relaxed.
- Sampling local food and drinks is also of interest.

# ACTIVITIES – LOWEST INTEREST

	Canada	NS	Other ATL
Road cycling	12	5	6
Snowshoeing or cross country skiing	12	9	10
Mountain biking	11	5	6
Agricultural or country farm tours	11	13	11
Scuba diving	10	8	7
Movie festivals	10	8	8
Shopping for luxury items	9	9	8
Guided airplane or helicopter tours	9	9	8
Renting a recreational vehicle (RV)	8	8	8
Rodeos	6	3	4
SAMPLE SIZE	9059	400	1051

- Thinking of your next vacation as government restrictions related to COVID-19 are relaxed, what activities or places are you interested in while on vacation?
- Table shows % selecting each activity.
- Activities involving physical or sports related pursuits are among the least popular, as are those that might include crowds, such as rodeos, shopping and movie festivals.

# BARRIERS TO TRAVEL

	Canada	NS	Other ATL
Health risks	47	60	55
Cost	34	39	37
Safety concerns	33	46	43
Poor weather	17	14	14
Winter driving conditions	17	15	14
There is no reason to visit anytime soon	16	21	17
Too many crowds at the places I want to visit in Canada	15	19	17
Poor value for money	14	12	11
Drive is too long	13	11	11
High gas prices	12	13	12
Nothing would prevent me from traveling/travelling to/within Canada	11	10	10
SAMPLE SIZE	9059	400	1201

- Which of the following factors might discourage you from visiting Canada?
- Table shows % selecting each factor.
- Nearly half of Canadians and more than half of Atlantic Canadians say general *health risks* are the biggest obstacle to travelling domestically.
- *Cost* and *safety concerns* are mentioned as obstacles by one-third of Canadians and about 4 in 10 Atlantic Canadians.
- Other factors are only mentioned by small minorities of residents.

# DESTINATION SELECTION

Consideration	In-Province	Out-of-Province
Health and safety measures in a province or territory	45	36
The number of COVID-19 cases increasing in a region / in a province or territory	33	28
The number of COVID-19 cases being higher in a region / province or territory, compared to where I live	31	31
Number of sights and attractions that are currently open in a region /province or territory, compared to where I live	26	25
The possibility of infecting others upon my arrival or return	18	16
Availability of insurance to cover trip interruption or change costs	14	20
Quarantine requirements upon entry into a province or territory	-	32
Quarantine requirements upon re-entry into my own province	-	29
Negative reaction from residents of a province or territory in response to visitors	12	11
None of the above	23	12
SAMPLE SIZE	4531	4528

- Which of the following are the most important considerations in selecting your travel destination?
- Table shows % selecting each factor.
- Among a list of items, a large minority of Canadians says provincial health and safety measures is the most important factor in choosing a destination – particularly for in-province travel. Quarantine requirements, and the number of COVID-19 cases, are also important.