

COVID-19

Recovery Signals Digest

A Roundup of
Travel Recovery Insights

Contents:

• Introduction	Page 3
• Source Notes and Methodology	Page 4
• Summary	Page 6
• Statistics Canada: International Arrivals	Page 8
• Environics Weekly Visitation Tracker	Page 11
• Destination Canada Visitor Economy Forecast Update	Page 16
• Destination Canada Resident Sentiment Survey	Page 24
• Government of Canada COVID-19 Status	Page 32
• Destination Analysts American Travel Sentiment Tracker	Page 41

Introduction

The Recovery Signals Digest is a bi-weekly overview of travel recovery indicators compiled by Tourism Nova Scotia.

The report provides timely insights for Nova Scotia's tourism industry about factors that influence travel recovery including cases of COVID-19 in Canada and internationally, vaccinations, visitation and travel intentions.

If you have questions about the Recovery Signals Digest, please contact us at:
tourismresearch@novascotia.ca

Source Notes and Methodology

- **Statistics Canada** (www.statcan.gc.ca) is the national statistical office. Its international arrivals data is sourced from the Canada Border Services Agency and from land ports equipped with the automated Integrated Primary Inspection Line system.
- **Environics Analytics** (<https://environicsanalytics.com/>) is a North American marketing information company. Its *Weekly Tracker* measures weekly domestic overnight visitation in Canada, using location data from mobile devices, sourced via privacy compliant third-party mobile data providers.
- **Destination Canada** (www.destinationcanada.com/) is a federal Crown corporation and Canada's national tourism marketing organization. Its **Visitor Economy Forecast Update** is based on a combination of Destination Canada research and third-party sources. Its **Resident Sentiment** survey is a weekly online poll of 1,800 residents, with some questions alternating bi-weekly. The data is weighted to be reflective of the Canadian population.

Source Notes and Methodology

- The **Government of Canada's** COVID-19 data ([COVID-19 daily epidemiology update - Canada.ca](#)) is updated from sources including the Public Health Agency of Canada and provincial and territorial partners.
- **Destination Analysts** (www.destinationanalysts.com) is a San Francisco-based tourism market research firm. Its *American Travel Trends & Sentiment* report is based on an independent, weekly survey of 1,200 American travellers. The survey was launched in the wake of the COVID-19 pandemic and has been conducted every week since March 15, 2020.

Summary

- According to Statistics Canada, international arrivals, by air and land, were **up in May 2021** over the same month in 2020, but volume remains sharply down from May 2019.
- **Overnight visitation to Nova Scotia** in the first week of June was **up 32%** over the previous week (WoW), and **up 23%** compared with the same week the previous year (YoY), according to Environics' Weekly Tracker of mobile data movements.
- Destination Canada's latest Visitor Economy Forecast says that under current trends, **tourism expenditures in Canada aren't expected to reach 2019 levels until 2025**. Recovery could be achieved by 2023, but only if global vaccination is successful, and if Canadians move more outbound tourism dollars to domestic destinations.
- Canadians' **comfort with various travel activities continues to trend upwards**, including for those activities that since the start of the pandemic have been least popular. For example, almost half of Canadians now feel comfortable *flying on an airplane*, according to Destination Canada's latest Resident Sentiment Survey.

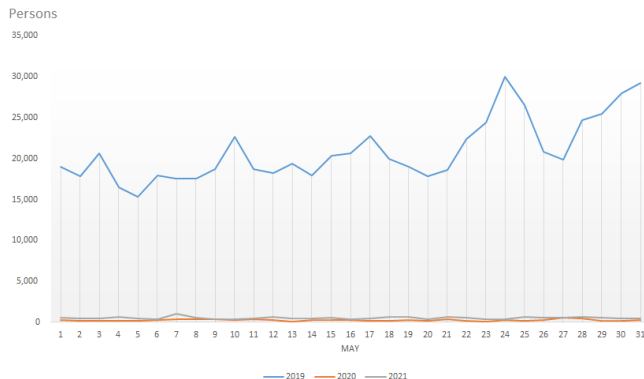
- The federal government reports that the **number of active COVID-19 cases in Canada continues to decline**, with less than 12,000 cases as of June 20, down from 23,000 in early June. Nationally, the **rate of active cases on June 20** stood at 31 cases per 100,000 people. In Nova Scotia, the rate was 8 per 100,000.
- Destination Analysts says although US travellers are increasingly ‘excited’ about travel, particularly leisure travel, a majority of more than six in 10 are still **reluctant to travel internationally** until the pandemic is at an end.

Statistics Canada: International Arrivals – May 2021

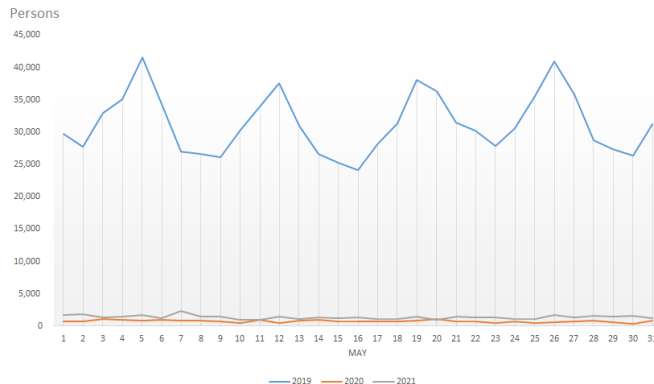
Released June 11, 2021

Stats Can: International Air Arrivals in May

Non-resident



Canadians



- **Non-residents** arriving at Canadian airports:

May 2021 – 17,000
May 2020 – 8,000
May 2019 – 649,000

- **Canadians** arriving at Canadian airports:

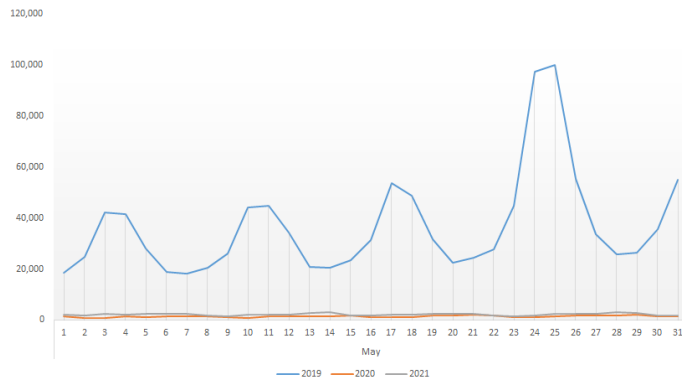
May 2021 – 43,000
May 2020 – 24,000
May 2019 – 970,000

- **Air arrivals were up in May 2021** over May 2020, but remained sharply down from the same month in 2019.

Stats Can: International Road Arrivals in May

US residents

Persons



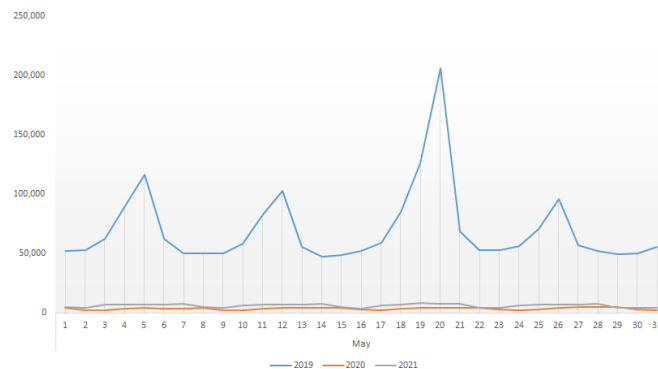
- **Non-residents** arriving at Canadian land border posts:

May 2021 – 67,000
May 2020 – 44,000
May 2019 – 1.1-million

- **Road arrivals were up in May 2021** over May 2020, but remained sharply down from the same month in 2019.

Canadians

Persons



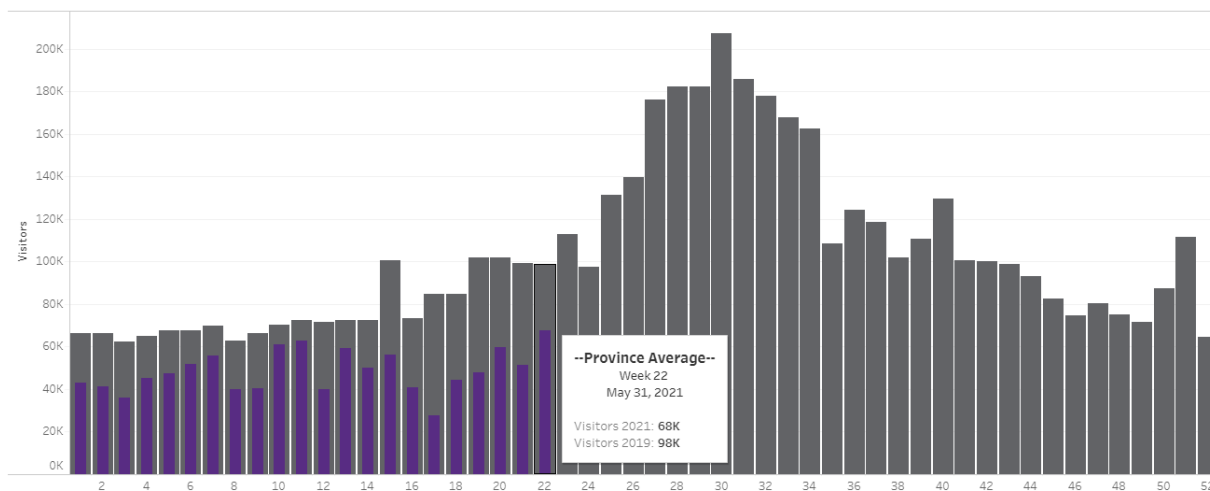
- **Canadians** arriving at Canadian land border posts:

May 2021 – 194,000
May 2020 – 114,000
May 2019 – 2.2 million

Environics Analytics Weekly Visitation Tracker

Environics Weekly Tracker – *Number of Visitors to Nova Scotia vs 2019*

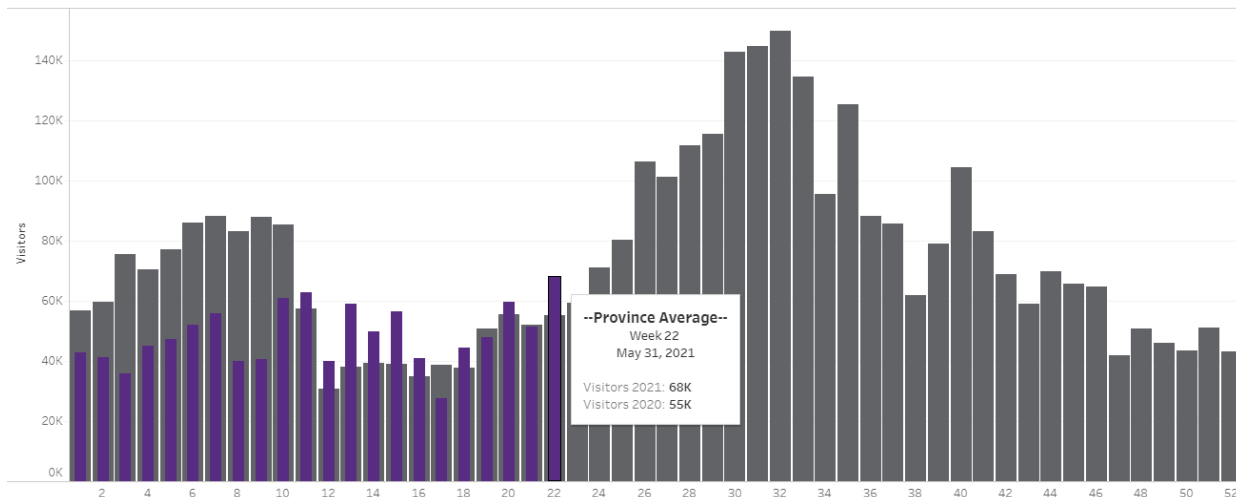
Data reflects number of overnight visitors to Nova Scotia. The Weekly Tracker uses data based on mobile phone movements (60+ kilometers overnight travel), which may differ from other visitation estimates.



- About **68,000** overnight visitors came to Nova Scotia the week of **May 31, 2021**, down from about 98,000 the same week in **2019**.

Environics Weekly Tracker – *Number of Visitors to Nova Scotia vs 2020*

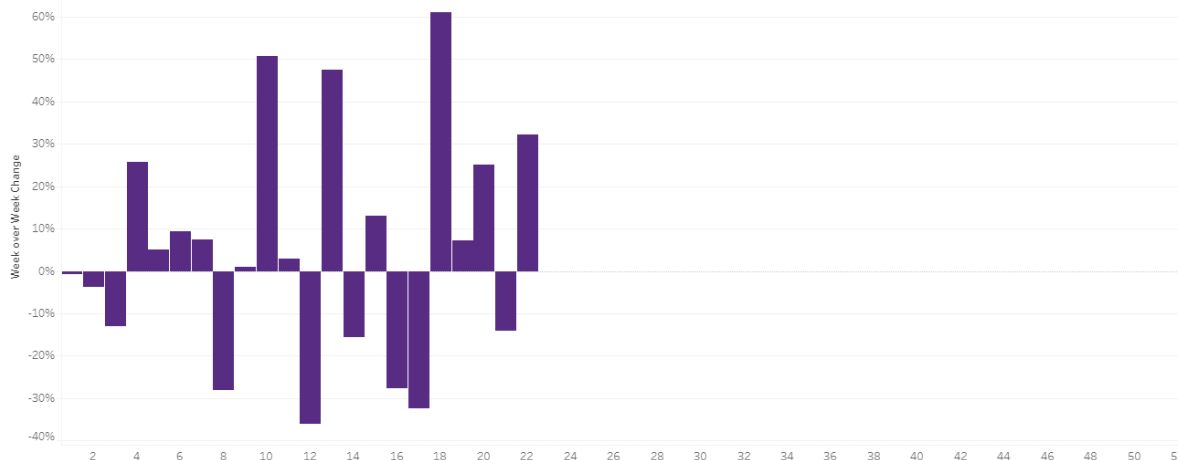
Data reflects number of overnight visitors to Nova Scotia. The Weekly Tracker uses data based on mobile phone movements (60+ kilometers overnight travel), which may differ from other visitation estimates.



- About **68,000** overnight visitors came to Nova Scotia the week of **May 31, 2021**, up from about 55,000 the same week in **2020**.

Environics Weekly Tracker – *Week Over Week Change, Nova Scotia*

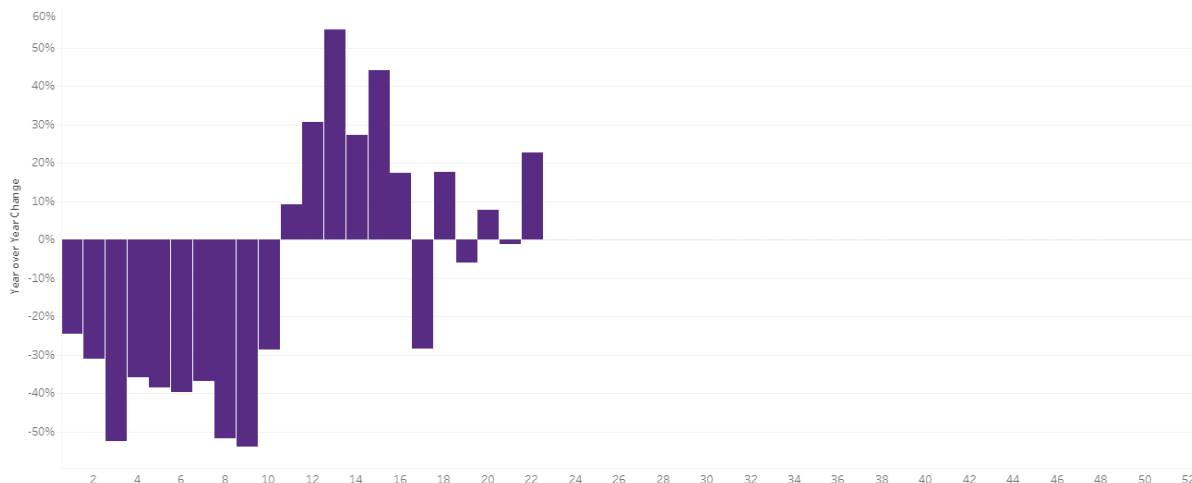
Data reflects number of overnight visitors to Nova Scotia. The Weekly Tracker uses data based on mobile phone movements (60+ kilometers overnight travel), which may differ from other visitation estimates.



- The week of **May 31, 2021**, overnight visitation to **Nova Scotia** was **up 32%** over the previous week (WoW). In comparison, **national** weekly overnight visitation was **up 9%**

Environics Weekly Tracker – Weekly Year Over Year Change, Nova Scotia

Data reflects number of overnight visitors to Nova Scotia. The Weekly Tracker uses data based on mobile phone movements (60+ kilometers overnight travel), which may differ from other visitation estimates.



- The week of **May 31, 2021**, overnight visitation to **Nova Scotia** was **up 23%** over the same week the previous year (YoY). In comparison, **national** weekly overnight visitation was **up 5% YoY**.

Destination Canada Visitor Economy Forecast Update

Selections from June 2021 report

Destination Canada: Recovery Scenarios

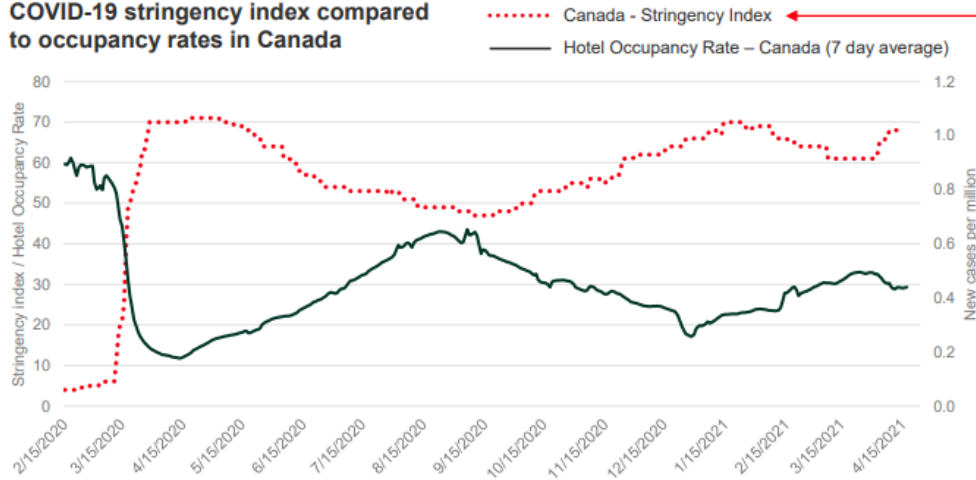
- The difference between the ideal and poor travel conditions could affect our recovery by years.

Travel Conditions	REV. IN 2021 (\$B)	LOSS IN 2021 VS 2019 (\$B)	LOSS IN 2022 VS 2019 (\$B)	RETURN TO 2019 LEVEL
Ideal	\$55.0	-\$50.1	-\$14.5	2023
Current	\$51.1	-\$54.0	-\$22.5	2025
Poor	\$46.0	-\$59.1	-\$34.8	>2026

Source: DC Research, May 2021 Forecast

Destination Canada: Domestic Occupancy in Relation to Pandemic Restrictions

COVID-19 stringency index compared to occupancy rates in Canada



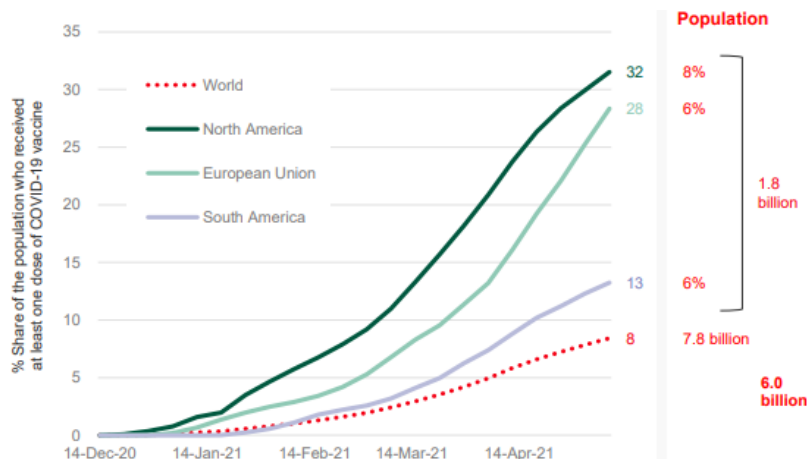
The **Stringency Index** measures the level public health measure enforcement designed to control the spread of the virus. It is a composite indicator combining restrictive closures, case detection, isolation, contact tracing and quarantine, and personal distancing

Source: Bank of Canada; Our World in Data; STR Inc.

Destination Canada: Slow Pace of Global Vaccination Poses Risk

- Some regions are quickly rolling out the vaccine, most of the world is not.
- It could take almost 5 more years based on current vaccination rates.
- Implication: increased risk that new variants could (re-)tighten borders.

Share of total population who received at least one dose of COVID-19 vaccine (as of May 10, 2021)



Source: <https://ourworldindata.org/covid-vaccinations>

Destination Canada: Border Opening Timelines

All scenarios assume the following:

- Proof of immunity against COVID 19 will be required
- Once restrictions are lifted COVID-19 cases remain under control
- No serious disruptions to vaccine supply or access to vaccines

SCENARIO	JUL	AUG	SEP	OCT-NOV 2021	Q4 2021	Q1 2022	Q2 2022
Ideal	Inter-provincial travel resumes	Border gradually reopens to all					
Current	Inter-provincial travel gradually resumes		US Border Reopens	UK, EU Border Reopens	Other countries open as vaccinations allow		
Poor			Inter-provincial travel resumes		US Border Reopens	UK and EU countries reopen	All other countries reopen

Destination Canada: Domestic Tourism Recovery by 2025

Under the current trends, tourism expenditures in Canada are expected to recover to 2019 levels by early 2025

We could recover earlier (by 2023)...

- **IF**
Global vaccination efforts are successful
- **AND**
Canadians switch a greater share of their outbound dollars towards Canadian destinations

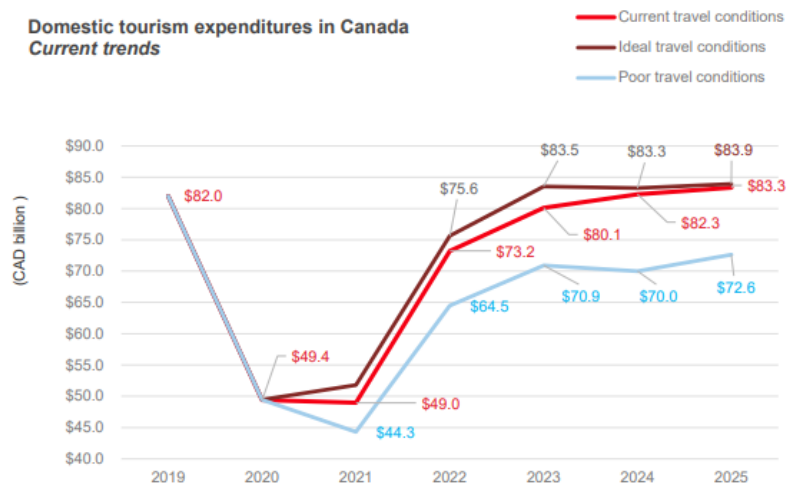
Level of total tourism expenditures in Canada relative to 2019



Source: DC Research, May 2021 Forecast

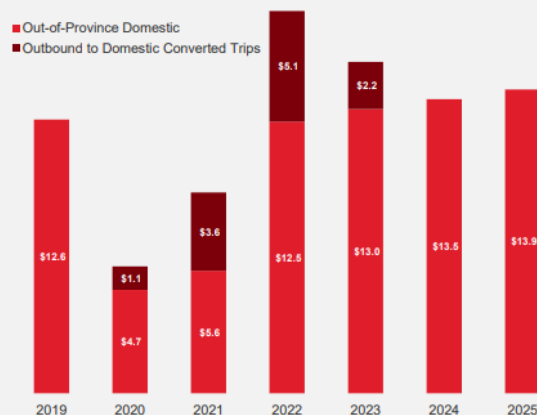
Destination Canada: Domestic Tourism Spending Projections

Domestic tourism expenditures in Canada
Current trends



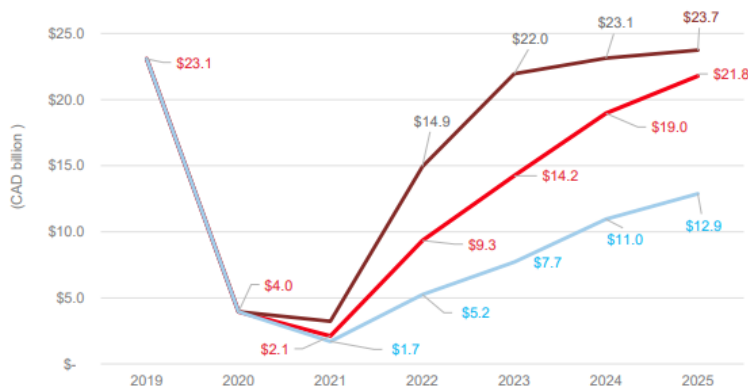
Forecast: Current Trends
Out-of-province and conversion of outbound travel

- Out-of-Province Domestic
- Outbound to Domestic Converted Trips

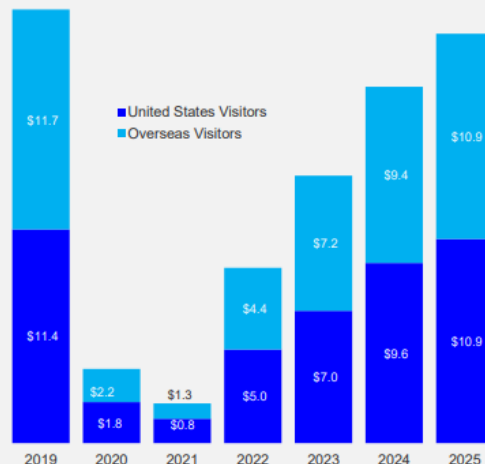


Destination Canada: International (Inbound) Tourism Spending Projections

International inbound tourism expenditures in Canada
Current trends



Level of total tourism expenditures
in Canada relative to 2019
(CAD billion)



Destination Canada: Resident Sentiment Survey

Updated June 15, 2021

Destination Canada Resident Sentiment – Safety of Travel

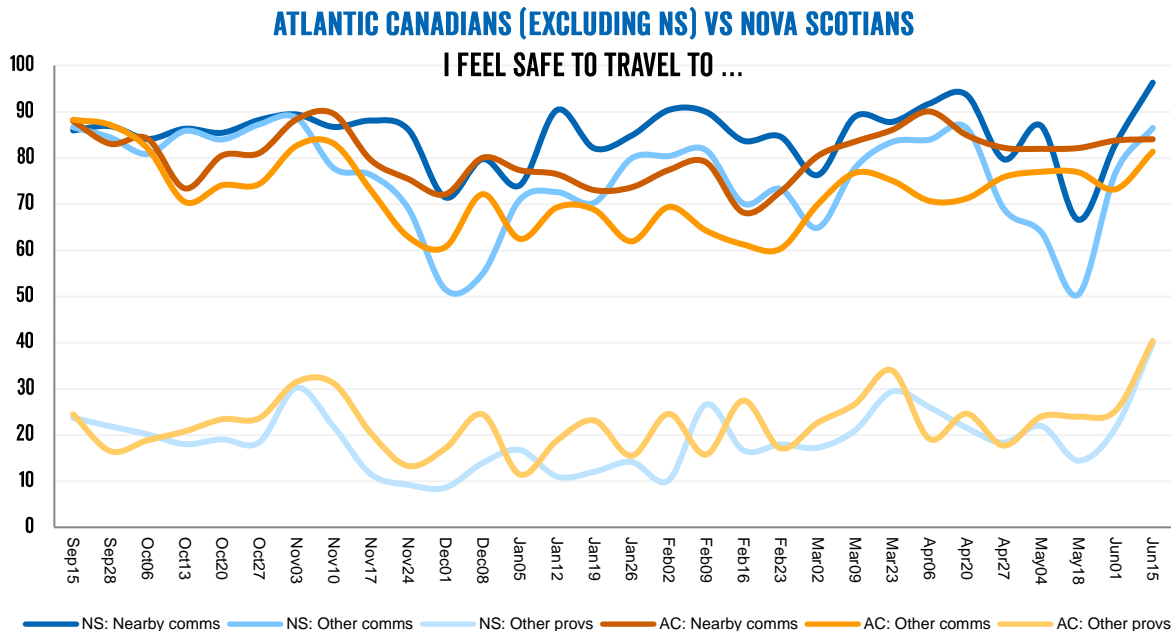
- ‘I feel safe to travel to...’

	REGION OF RESIDENCE						ATLANTIC CANADA	
	BC	AB	SK / MB	ON	QC	ATL	Rural	Urban
Communities near me	85	88	75	82	83	89	93	85
Communities in my province	76	85	70	72	79	83	85	83
Other provinces in Canada	47	66	54	54	58	40	34	44
The United States	32	36	30	27	41	15	13	15
Other countries	25	30	22	22	30	12	15	11
SAMPLE SIZE	200	200	201	604	412	200	122	78

- % Somewhat / Strongly Agree
- Note: red/green text indicates a significant difference between regions.
- Results from week of June 15 2021.

- A large majority of Canadians report feeling safe travelling *to nearby communities* and *elsewhere in their own provinces*. Meanwhile, few feel comfortable travelling *internationally*, with those residing in Atlantic Canada least likely to feel comfortable with international travel.
- About half of Canadians in most regions feel safe travelling to *other provinces* within the country, with still only a minority of British Columbians (47%) and Atlantic Canadians (40%) willing to undertake such travel. Two-thirds of Albertans feel safe travelling to other provinces.
- Atlantic Canadians' feelings of safety travelling *outside their province* are the lowest in the country.

Destination Canada – Safety of Travel, NS vs Atlantic



- For both Nova Scotians and Atlantic Canadians, there remains a wide and persistent gap in safety sentiment between travel within one's home province, and travel to other provinces.

Destination Canada Resident Sentiment – Welcoming Visitors

- ‘I would welcome visitors travelling to my community from ...’

	REGION OF RESIDENCE					
	BC	AB	SK / MB	ON	QC	ATL
Other communities near me	74	80	67	66	70	79
Other parts of my province	66	76	66	57	70	74
Other parts of Canada	43	62	48	48	54	35
The United States	25	35	29	25	32	18
Other countries	22	26	23	19	25	12
SAMPLE SIZE	200	200	201	604	412	200

ATLANTIC CANADA	
Rural	Urban
86	76
75	74
36	34
15	20
14	10
122	78

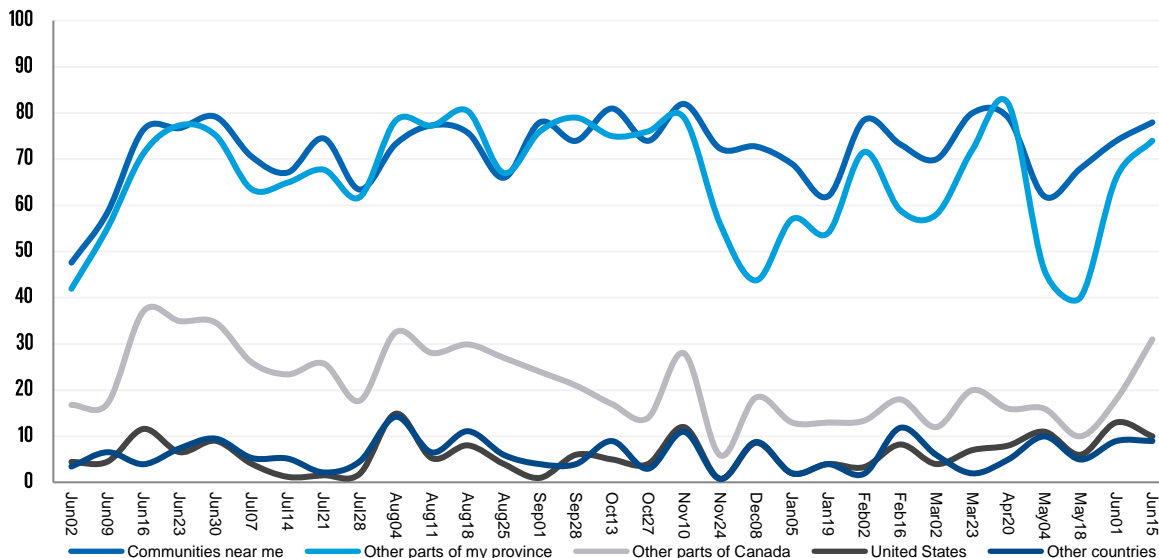
- % Somewhat / Strongly Agree
- Note: red/green text indicates a significant difference between regions.

- Results from week of June 15 2021.

- The level of welcome Canadians feel toward all types of visitors continues to trend upwards.
- Canadians remain negative about welcoming *international* visitors, with only about one-quarter of those in most regions willing to do so. Only Atlantic Canada and Ontario remain under 20% in this regard. In addition, about one-quarter to one-third of Canadians outside of Atlantic Canada would welcome US visitors.
- There continues to be substantial variability among regions with respect to welcoming visitors from *other parts of the country*: Alberta residents are alone at the high end, with 62% willing to welcome people from elsewhere in the country, followed by about half of Quebec, Ontario, Saskatchewan/Manitoba, and BC residents. At the lower end, only 35% of Atlantic Canadian residents would welcome such visitors.

Destination Canada – Welcoming Visitors, among Nova Scotians

NOVA SCOTIANS: I WOULD WELCOME VISITORS TRAVELLING TO MY COMMUNITY FROM ...

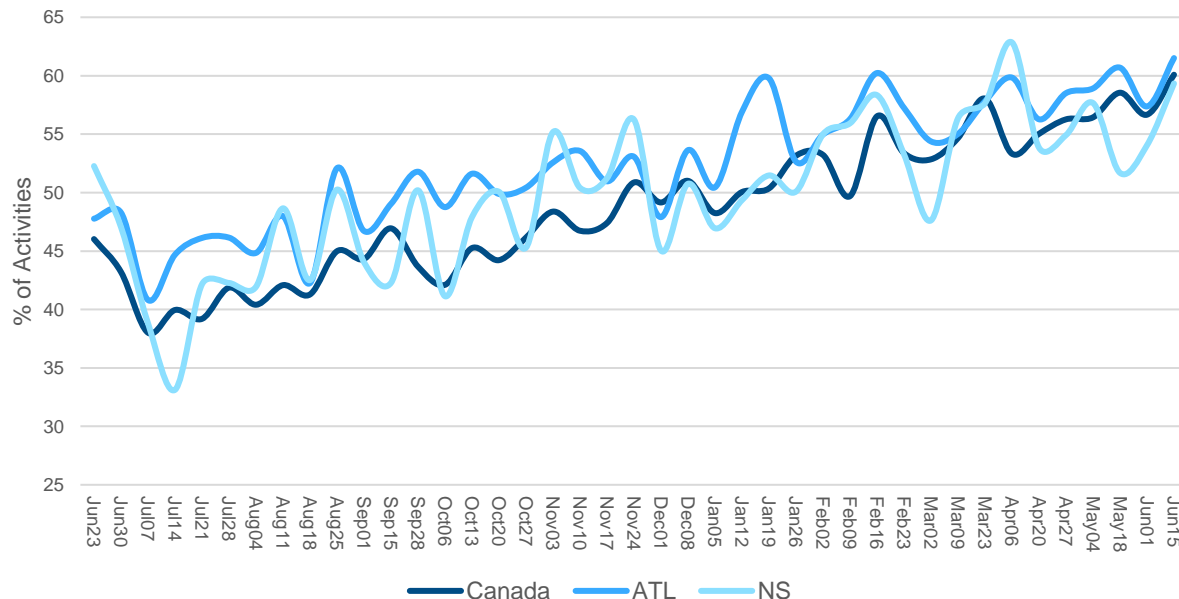


- A large majority of Nova Scotians would welcome visitors from within their province, but only a few would welcome visitors from elsewhere.

Destination Canada Resident Sentiment – Comfort With Activities

- Respondents were asked: *Once the governments lift the protective measures put in place to fight COVID19, which of the following would you be comfortable doing...*
- Over the course of the Resident Sentiment survey, Atlantic Canadians have generally been comfortable participating in a greater proportion of the activities available to them, compared with Canadians in general. This difference has narrowed as levels have slowly trended upwards over the entire measurement period.
- At the lower end, comfort continues to increase for activities such as *attending large events*, or *going to bars and pubs*. Perhaps this is a result of venues creating lower-risk environments where these activities can be done in relative safety (e.g., limited capacity, masks required).
- Comfort also continues to increase for travel-related activities such as *travelling to the United States* and *flying on an airplane*.
- Atlantic Canadians are least comfortable with *travelling to the United States* and *flying on an airplane*. Meanwhile, other Canadians are least comfortable with *large gatherings* and *going to bars*.

Destination Canada – Comfort With Activities (% Overall)



- Graph shows the overall % of activities respondents would be comfortable participating in, based on the activities applicable to each respondent.

Destination Canada – Comfort With Activities, Most/Least Comfortable

Activity	Canada	Atlantic Canada	Nova Scotia
Activities most comfortable with:			
Allowing in-home renovations	85	86	86
Shopping at the mall	78	76	77
Going back to your workplace/office	75	81	76
Dining in restaurants	71	80	75
Activities least comfortable with:			
Flying on an airplane	47	38	38
Travelling to the United States	43	32	33
Large gatherings such as sporting events, concerts, or festivals	42	48	41
Going to bars, lounges, night clubs, pubs	39	43	45
SAMPLE SIZE	1817	200	99

- % Comfortable with each activity, among applicable
- Results from week of June 15 2021.

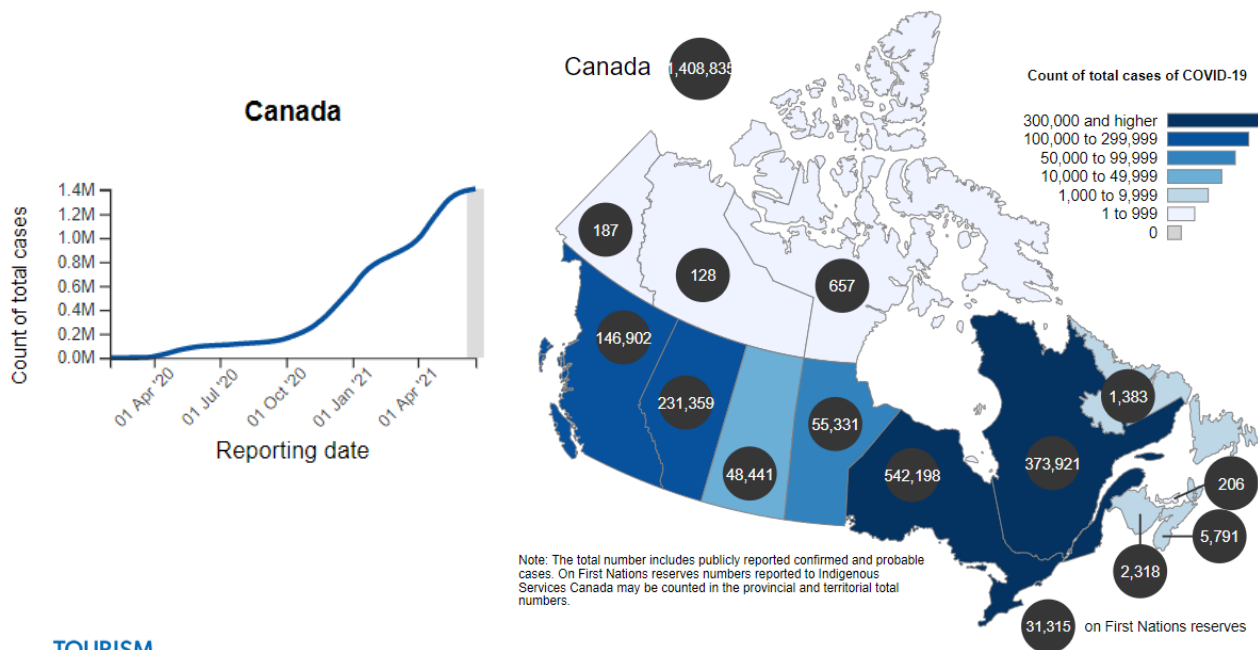
Government of Canada COVID-19 Status

Updated June 20, 2021

Government of Canada – COVID-19

Count of *Total* Cases

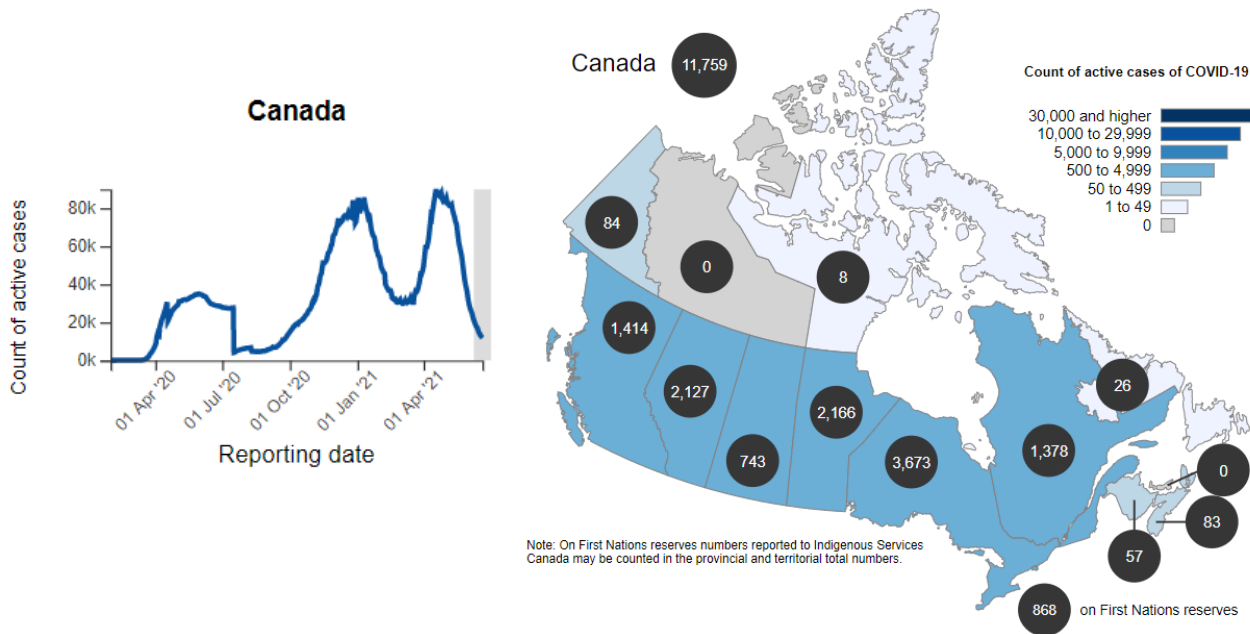
The count of total cases of COVID-19 in **Canada** was **1,408,835** as of June 20, 2021



Government of Canada – COVID-19

Count of *Active* Cases

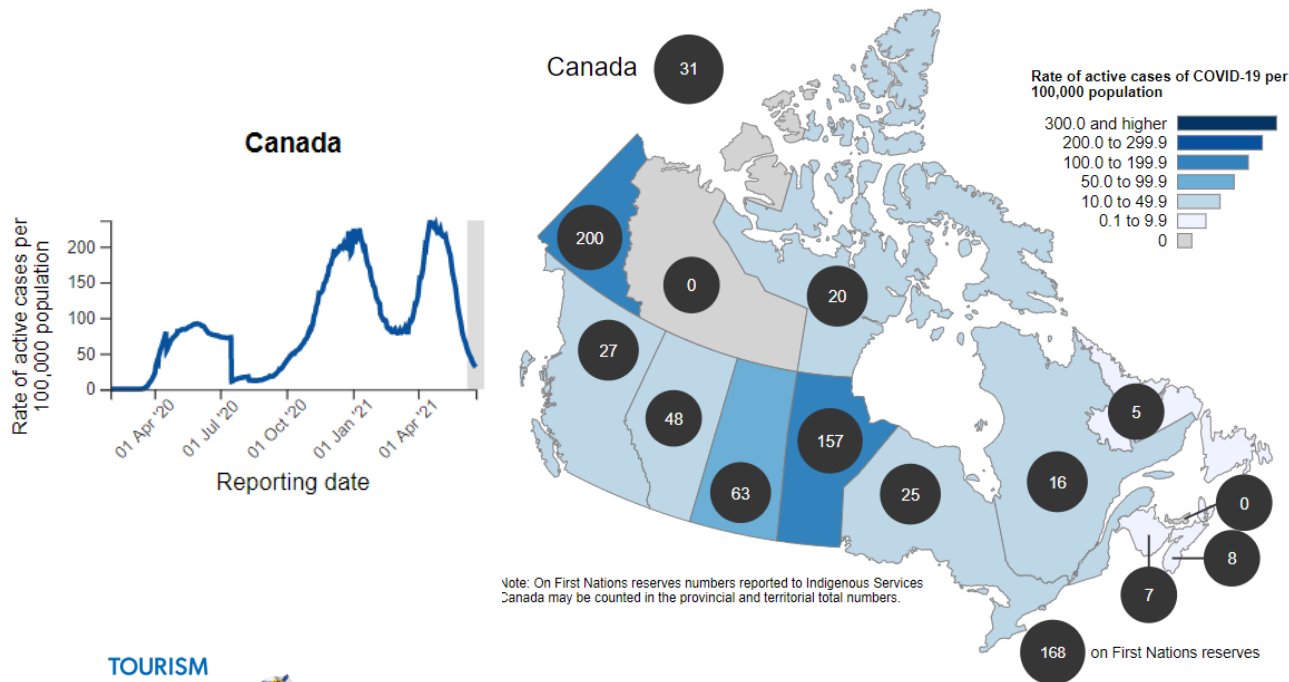
The count of active cases of COVID-19 in **Canada** was **11,759** as of June 20, 2021



Government of Canada – COVID-19

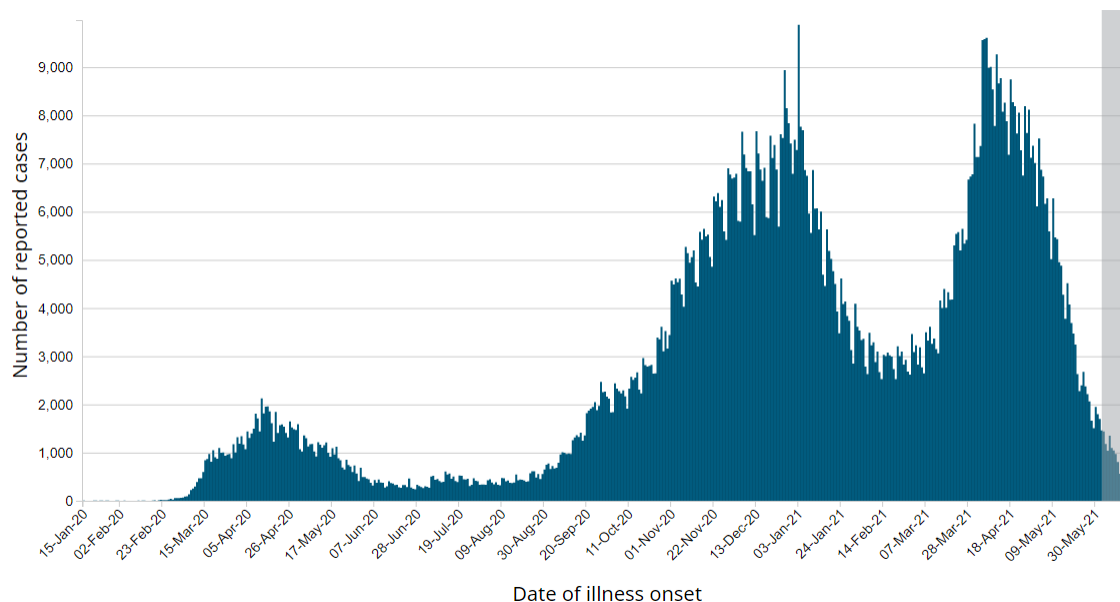
Rate of Active Cases

The rate of active cases of COVID-19 in **Canada** was **31 per 100,000 population** as of June 20, 2021



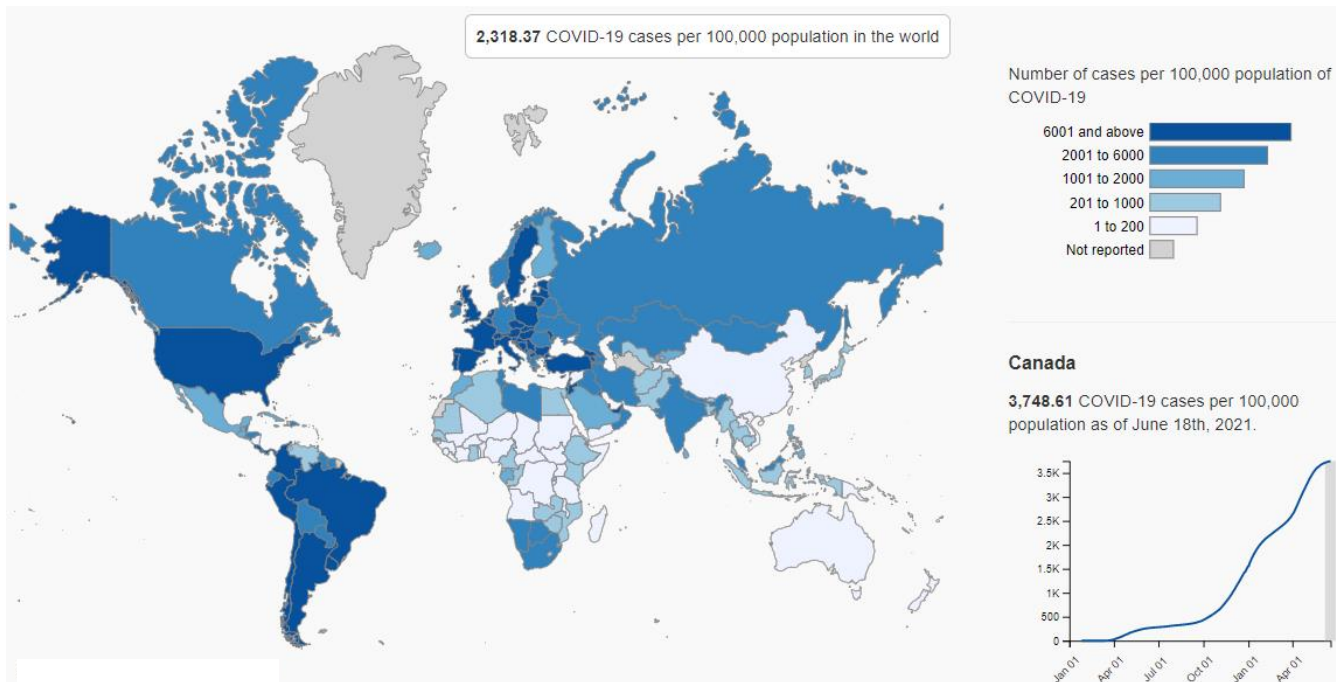
Government of Canada – COVID-19 Cases by *Date*

Total COVID-19 cases in Canada by date of illness onset, as of June 18, 2021.



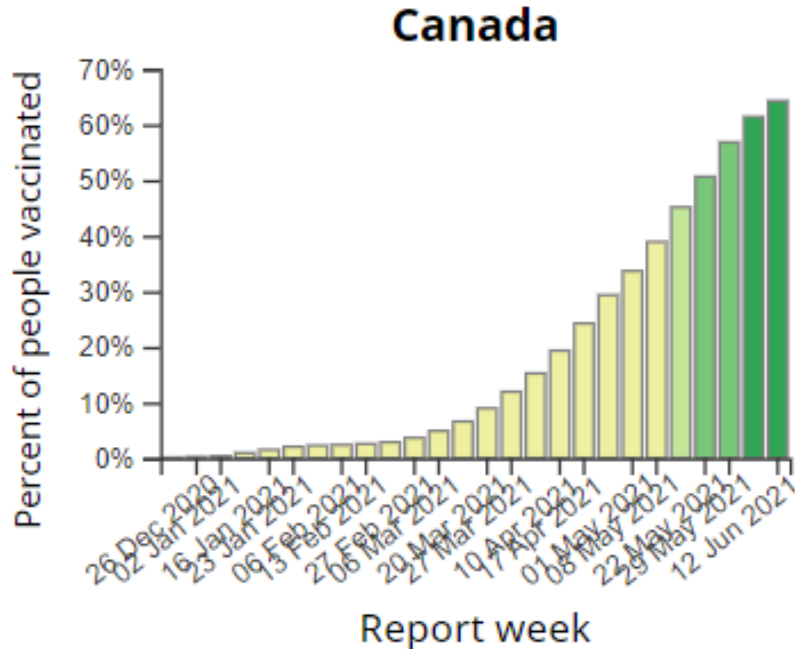
Government of Canada – COVID-19

World Cases Per 100,000 People



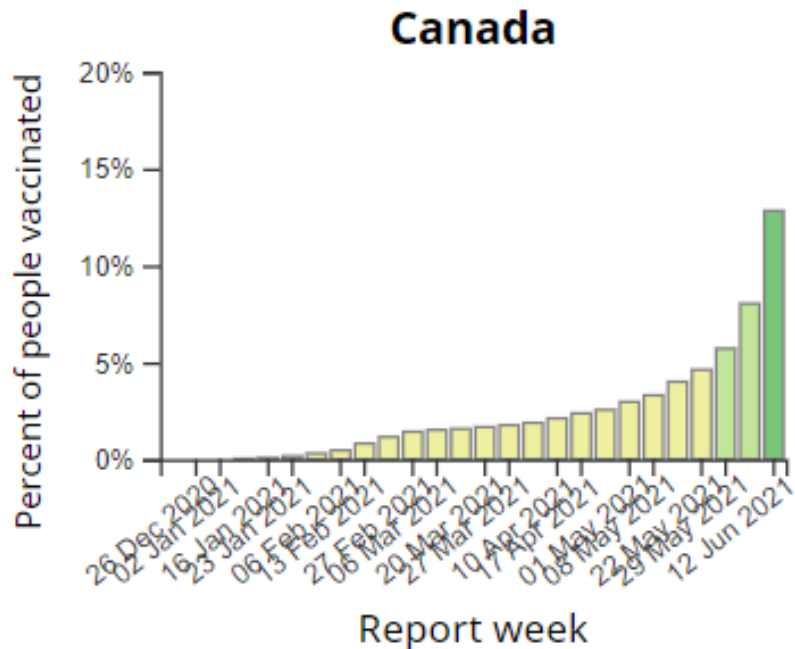
Government of Canada – Percentage With at Least One Vaccine Dose

- The cumulative percent of the population who have received **at least one dose** of a COVID-19 vaccine in Canada was **64%** as of June 12, 2021.



Government of Canada – Percentage Fully Vaccinated

- The cumulative percent of the population **fully vaccinated** with a COVID-19 vaccine in Canada was **13%** as of June 12, 2021.



Nova Scotia COVID-19 Cases

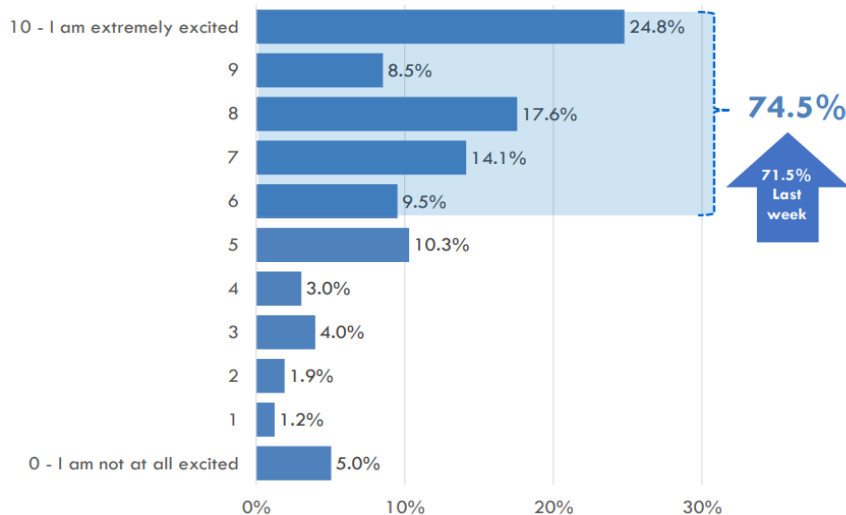
- The Province of Nova Scotia provides daily updates of new cases of COVID-19, total active cases of COVID-19, and cumulative cases of COVID-19, as well as doses of COVID-19 administered within the province.
- See the Province of Nova Scotia's COVID-19 data dashboard at:
<https://novascotia.ca/coronavirus/data/#dashboard>

Destination Analysts American Travel Sentiment Tracker

Updated to June 11, 2021

Destination Analysts: Excitement For Leisure Travel Growing

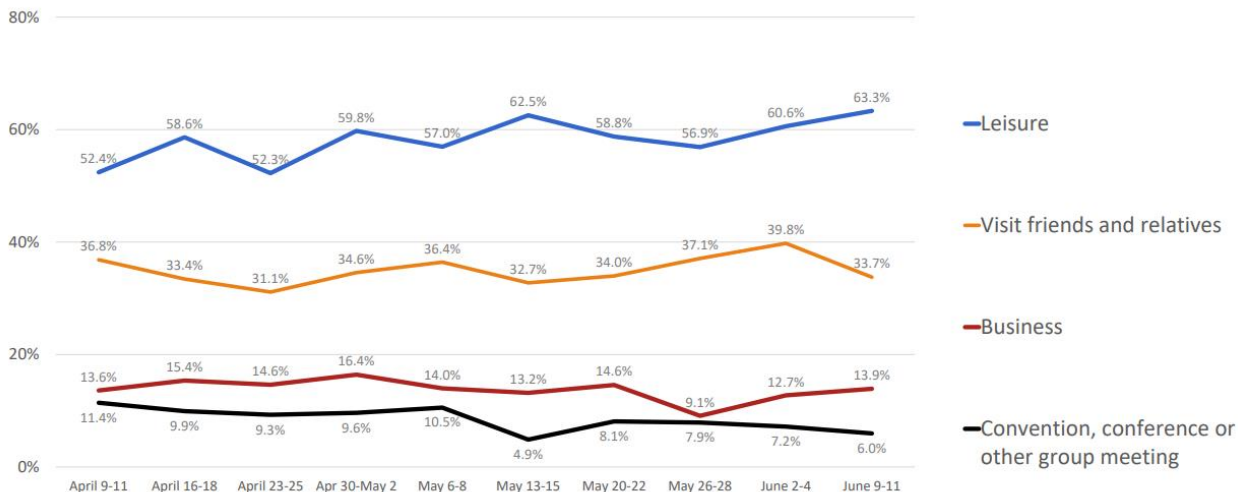
Question: Which best describes how excited you are about **LEISURE TRAVEL** in this year (2021)? (Please answer using the 11-point scale below)



- Among US travellers, interest in leisure travel is on the rise, with three-quarters now saying they are 'excited' and one-quarter 'extremely excited' about leisure travel.

Destination Analysts: Plans For Leisure Travel (Only) Are Up

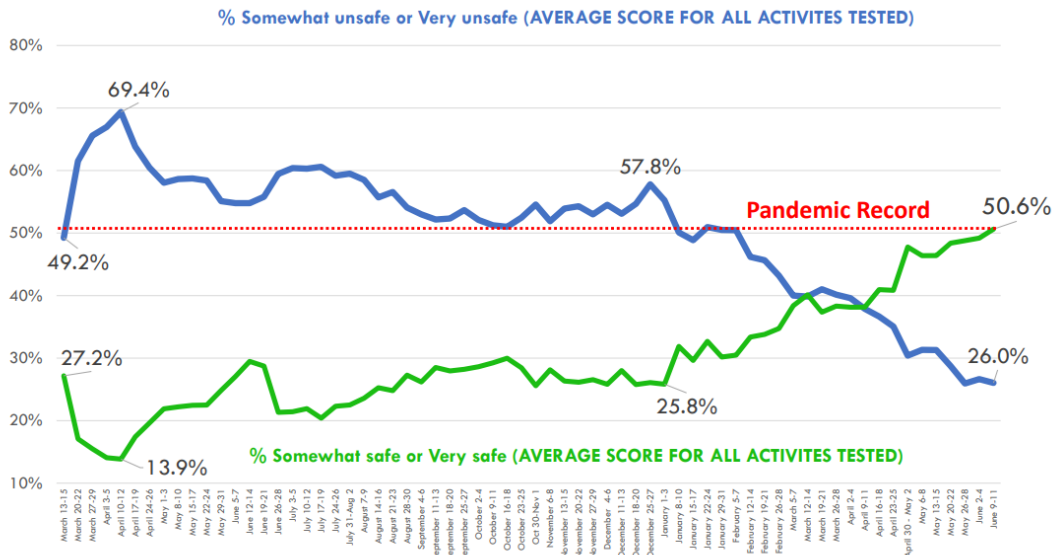
Question: Which of the following types of travel are you planning during the next 3 months?



- Since early April, Americans' actual plans for leisure travel have grown marginally, while plans for other types of travel have declined or stalled.

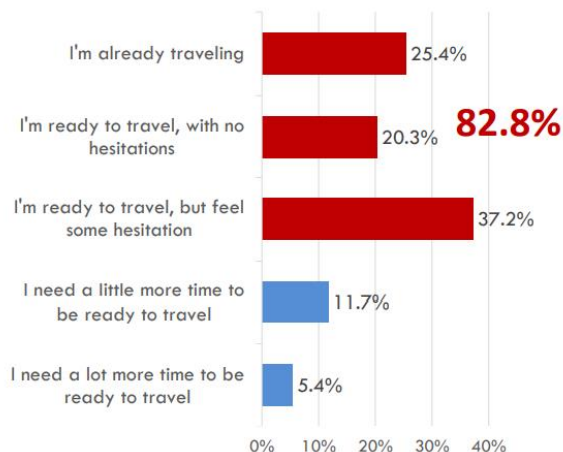
Destination Analysts: Comfort With Travel Activities at Record High

Question: At this moment, how safe would you feel doing each type of travel activity?

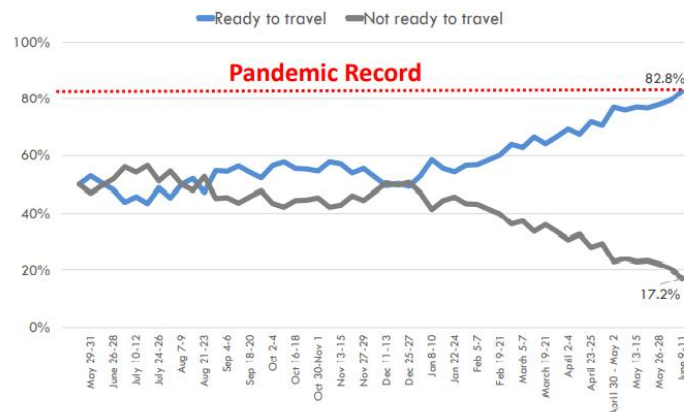


Destination Analysts: Most Travellers Ready to Travel Again

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



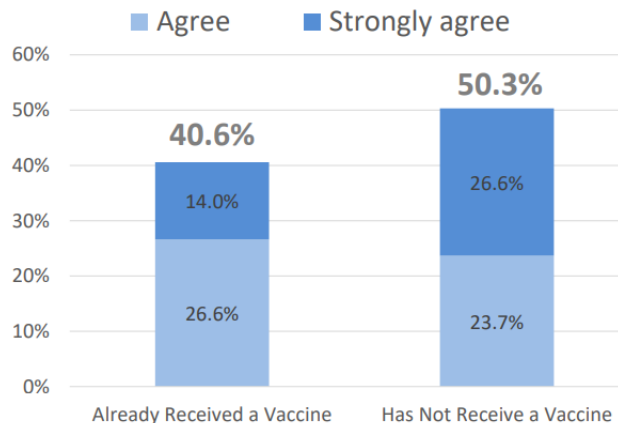
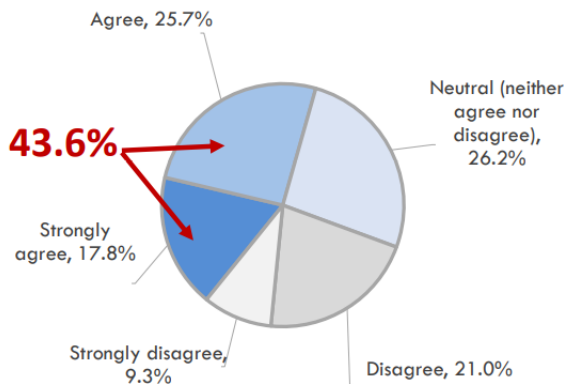
Historical data



- More than eight in 10 US travellers report that they are already travelling or are now ready to travel – the highest number since tracking started in May 2020.

Destination Analysts: Uncertainty About End of Pandemic

Question: In my heart, I feel like the COVID-19 pandemic is effectively over. I'm ready to move forward.



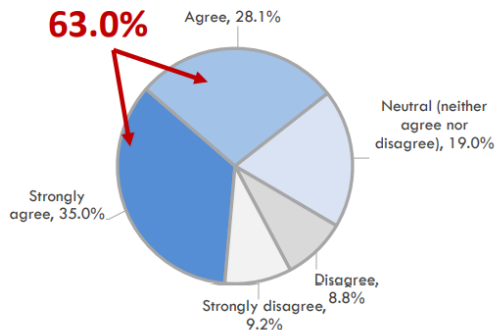
(Base: Waves 65-66 data. All respondents, 1,217 and 1,215 completed surveys.)

- Although increasing numbers of American travellers are excited and ready to travel again, there is disagreement and uncertainty about whether the pandemic has ended.

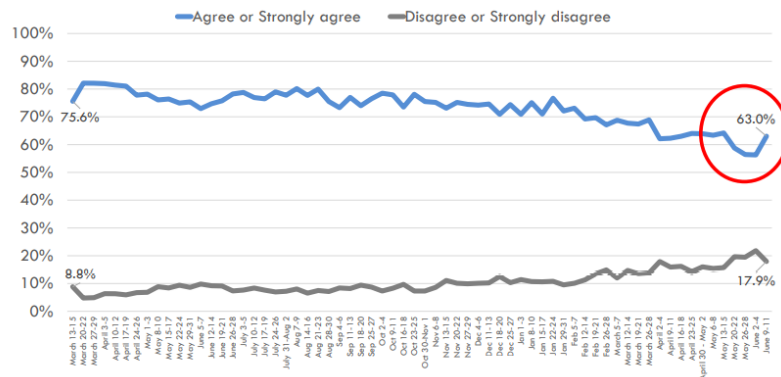
Destination Analysts: Avoiding International Travel

How much do you agree with the following statement?

Statement: I will be unlikely to travel outside the United States until the coronavirus situation is resolved.



Historical data



- A majority of US travellers continues to want to avoid international travel, until the pandemic is demonstrably finished.

