

COVID-19

# Recovery Signals Digest

A Roundup of  
Travel Recovery Insights

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# 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](mailto:tourismresearch@novascotia.ca)

# Source Notes and Methodology

- **Statistics Canada** ([www.statcan.gc.ca](http://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.
- The **Nova Scotia Department of Finance** is a department of the Government of Nova Scotia. It publishes Daily Stats on a range of economic and other data relevant to Nova Scotia ([Nova Scotia Department of Finance - Economics and Statistics](#)).
- **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.

# Source Notes and Methodology

- **Destination Canada** ([www.destinationcanada.com/](http://www.destinationcanada.com/)) is a federal Crown corporation and Canada's national tourism marketing organization. Its **Travel Recovery Assessment** is based on analysis of research by Destination Canada 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.
- The **Government of Canada's** COVID-19 data ([COVID-19 daily epidemiology update - Canada.ca](https://www150.communiquedecanada.ca/fr/covid-19/actualites/2020/04/2020-04-29-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](http://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

- Domestic tourism activity in Nova Scotia – including travel by Nova Scotians within their home province – fell more than **56% in April 2021** compared with April 2019, **the largest decline of any province in Canada** in that period, according to an analysis by the Nova Scotia Department of Finance.
- According to Statistics Canada's latest National Tourism Indicators, tourism spending **fell another 3% in the first quarter of 2021**, following a year-over-year decline of 49% in 2020. The non-resident share of overall tourism spending rose 9% in Q1 2021.
- Statistics Canada also reports that trips to Canada by international visitors were **down 6% in April 2021** compared with March 2021.
- **Overnight visitation to Nova Scotia** in the third week of June was **up 18%** over the previous week (WoW), and **up 25%** compared with the same week the previous year (YoY), according to Environics' Weekly Tracker of mobile data movements.

# Summary

- Destination Canada's latest Travel Recovery Assessment shows **Nova Scotia and Ontario both progressing** in late June from the Hyper-local (stage II) phase of recovery to the Intra-provincial (stage III) phase, where most other provinces are also situated.
- The federal government reports that the **number of active COVID-19 cases in Canada continues to decline**, with less than 6,000 cases as of July 5, down by half since mid-June. Nationally, the **rate of active cases on** July 5 stood at 15 cases per 100,000 people. In Nova Scotia, the rate was 5 per 100,000.
- Destination Analysts says **optimism is waning among US travellers** about the immediate outlook of the pandemic in that country, while at the same time a once-rising trend of excitement about leisure travel in 2021 has now stabilized.

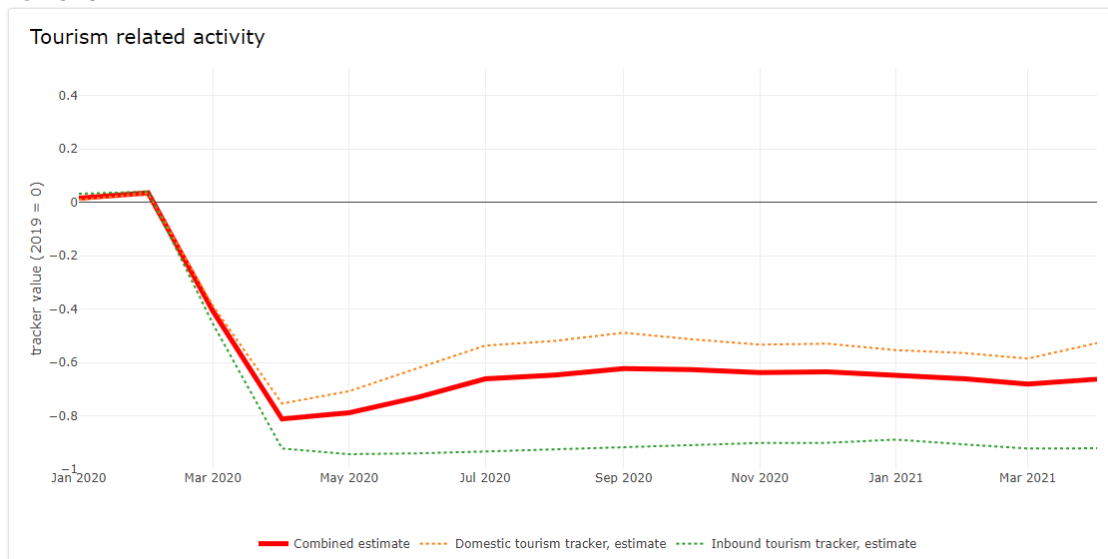
# Statistics Canada: Canadian Tourism Activity Index

Updated to April 2021



# Statistics Canada: Tourism Activity Index – Canada

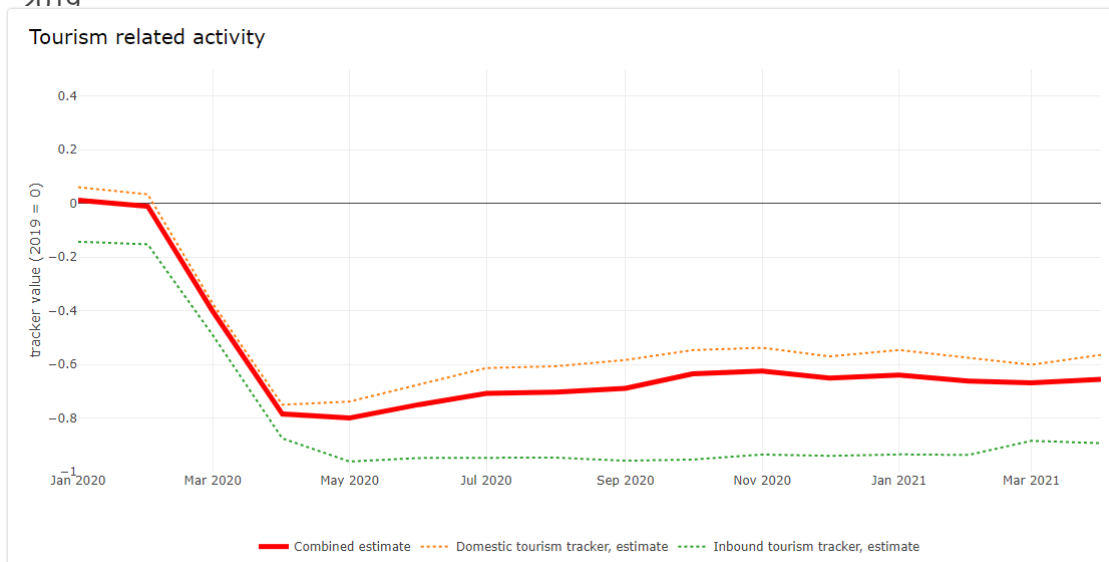
- The index shows the relative performance of aggregated tourism activity in Canada (i.e., arrivals, departures, spending etc.) over time. The base period – with an index measure of ‘0’ – is 2019



- In April 2021, combined tourism activity in **Canada** was **66.3% below** the level in April 2019.

# Statistics Canada: Tourism Activity Index – Nova Scotia

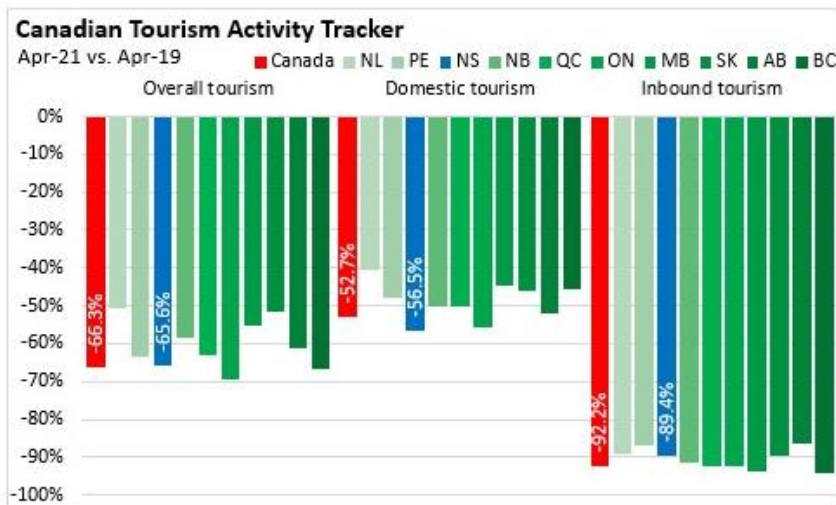
- The index shows the relative performance of aggregated tourism activity in Nova Scotia (i.e., arrivals, departures, spending etc.) over time. The base period – with an index measure of '0' – is 2019



- In April 2021, combined tourism activity in **Nova Scotia** was **65.6% below** the level in April 2019.

# Statistics Canada: Tourism Activity Index – Provincial Comparisons

- The **Nova Scotia Department of Finance**, using the Statistics Canada Tourism Activity data, has illustrated the relative tourism declines of Canada and of each province (April 2021 vs April 2019).



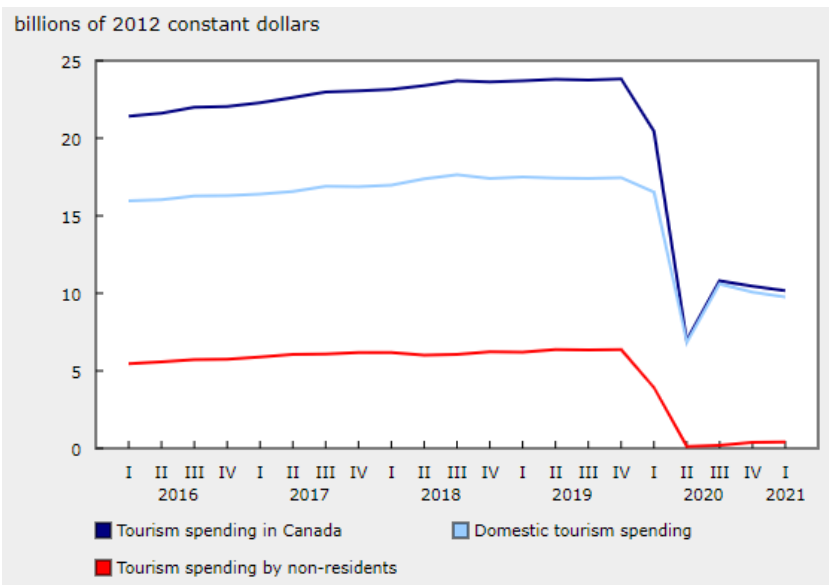
- Overall tourism:** Nova Scotia's April decline of 65.6% was among the worst in Canada, slightly lower than the national decline of 66.3%.
- Domestic tourism** (Canadian travel, including Nova Scotians visiting other parts of their home province): *Nova Scotia's April decline of 56.5% was the largest drop among provinces, and higher than the national decline of 52.7%.*
- Inbound tourism** (travel from other countries): Nova Scotia's decline of 89.4% was somewhat lower than the national decline of 92.2%.

For more information, go to: [Nova Scotia Department of Finance - Statistics](#)

# Statistics Canada: National Tourism Indicators, Q1 2021

Released June 29, 2021

# Statistics Canada: National Tourism Indicators – Spending Drops in Q1

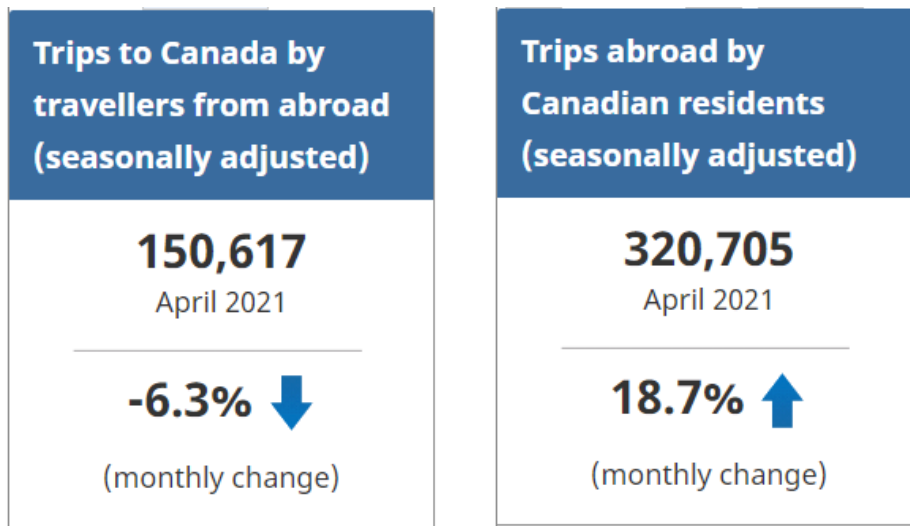


- After a 49% drop year-over-year in 2020, tourism spending dropped another 3% in the first quarter of 2021.
- First quarter spending was 57% lower than the pre-pandemic levels of the fourth quarter in 2019.
- Spending by Canadians was down 3% in the first quarter of 2021. Domestic spending made up 96% of total tourism spending.
- Non-resident spending rose 9% in the first quarter of 2021, but remained 94% below the fourth quarter of 2019.

# Statistics Canada: Travel Between Canada and Other Countries – April 2021

Released June 22, 2021

# Statistics Canada: Travel Between Canada and Other Countries



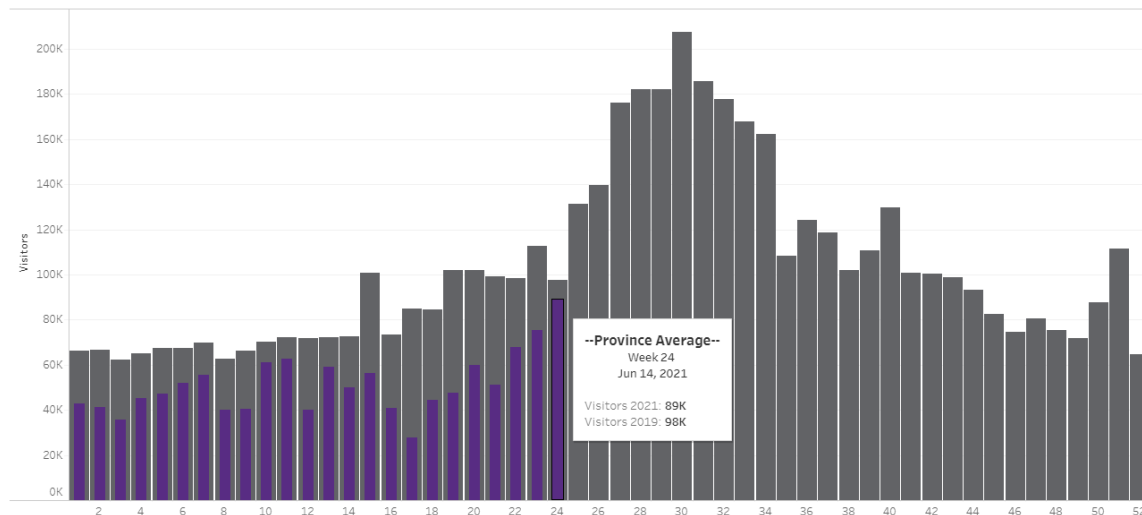
- Trips to Canada by travellers from abroad were **down about 6%** in April from the previous month, and down 93% from pre-pandemic levels in April 2019.
- Trips abroad by Canadians were **up nearly 19%** in April from the previous month, but down 93% from pre-pandemic levels in April 2019.

# Environics Analytics Weekly Visitation Tracker



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

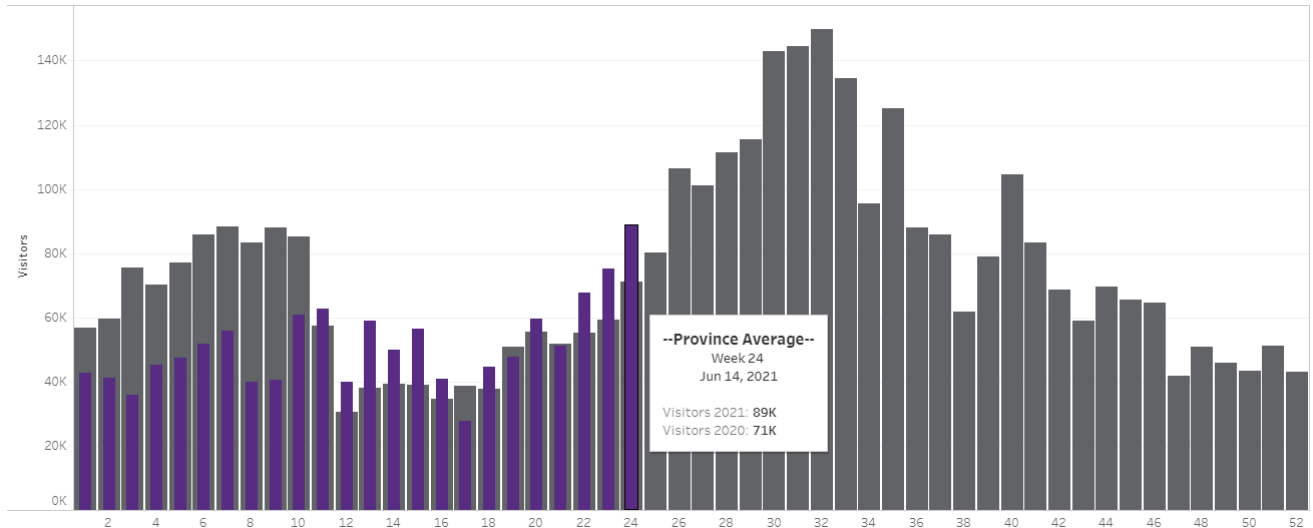
Data reflects number of overnight visitors to Nova Scotia. The Weekly Tracker uses data based on mobile phone movements (60+ kilometers overnight travel), which may differ from other visitation estimates.



- About **89,000** overnight visitors came to Nova Scotia the week of **June 14, 2021**, **down** from about 98,000 the same week in **2019**.

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

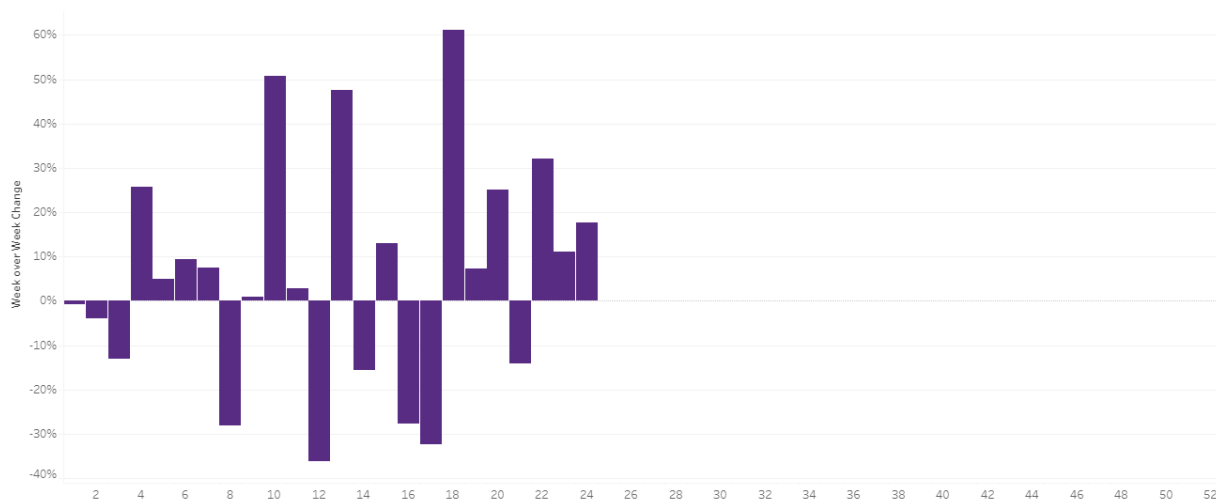
Data reflects number of overnight visitors to Nova Scotia. The Weekly Tracker uses data based on mobile phone movements (60+ kilometers overnight travel), which may differ from other visitation estimates.



- About **89,000** overnight visitors came to Nova Scotia the week of **June 14, 2021**, **up** from about 71,000 the same week in **2020**.

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

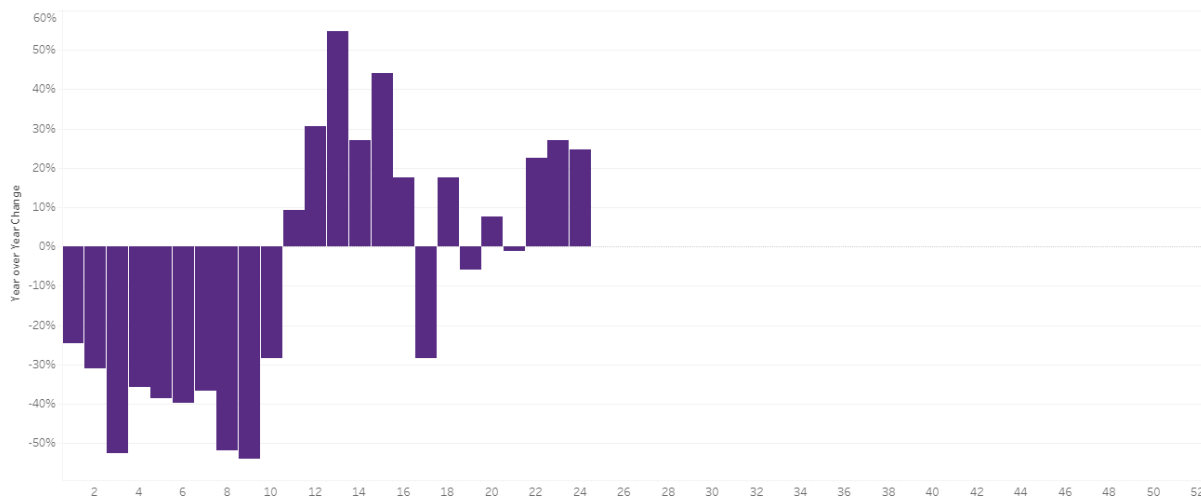
Data reflects number of overnight visitors to Nova Scotia. The Weekly Tracker uses data based on mobile phone movements (60+ kilometers overnight travel), which may differ from other visitation estimates.



- The week of **June 14, 2021**, overnight visitation to **Nova Scotia** was **up 18%** over the previous week (WoW). In comparison, **national** weekly overnight visitation was up 9% WoW.

# Environics Weekly Tracker – *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 **June 14, 2021**, overnight visitation to **Nova Scotia** was **up 25%** over the same week the previous year (YoY). In comparison, **national** weekly overnight visitation was down 2% YoY.

# Destination Canada: Travel Recovery Assessment

# DC Provincial Travel Recovery Assessment

Timeline of overall assessment for each province and territory:

	16-Feb	23-Feb	02-Mar	09-Mar	16-Mar	23-Mar	30-Mar	06-Apr	13-Apr	20-Apr	27-Apr	02-May	09-May	16-May	23-May	30-May	06-Jun	13-Jun	20-Jun
British Columbia	III	III	III	III	III	III	III	III	III	II	II	II	II	II	II	II	II	III	III
Alberta	II	II	II	III	IV	IV	IV	IV	IV	IV	II	II	II	II	II	II	II	II	IV
Saskatchewan	II	II	II	II	II	II	II	II	II	II	II	II	II	II	II	II	II	II	II
Manitoba	II	II	II	II	II	II	II	II	II	II	II	II	II	II	II	II	II	II	II
Ontario	II	II	II	II	II	II	II	II	II	II	II	II	II	II	II	II	II	II	III
Quebec	II	II	II	II	IV	IV	IV	IV	IV	IV	II	II	II	II	II	III	III	III	III
New Brunswick	II	II	III	III	III	III	III	III	III	III	III	III	III	III	III	III	III	III	III
Nova Scotia	III	III	III	III	III	III	III	III	III	III	III	III	III	II	II	II	II	II	III
Prince Edward Island	III	III	III	III	III	III	III	III	III	III	III	III	III	III	III	III	III	III	III
Newfoundland & Labrador	III	III	II	II	II	II	II	III	III	III	III	III	III	III	III	III	III	III	III
Yukon	II	II	II	II	II	II	II	II	II	II	II	II	II	II	II	II	IV	IV	IV
Northwest Territories	III	III	III	III	III	III	III	III	III	III	III	III	III	III	III	III	III	III	III
Nunavut	III	III	III	III	III	III	III	III	III	III	III	III	II	II	II	III	III	III	IV

  Indicates a forward phase progression
   Indicates a backward phase regression

**Legend:**

Overall Assessment

<b>I</b> COVID-19 Response	<b>II</b> Hyper Local	<b>III</b> Intra-provincial	<b>IV</b> Inter-provincial	<b>V</b> Tentative International	<b>VI</b> Regularized International
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Rate of new weekly COVID-19 cases per 100,000 population<sup>2</sup>

## Definitions:

I COVID-19 Response	II Hyper Local	III Intra-prov	IV Inter-prov	V Tentative Int'l	VI Regularized Int'l
Movement is restricted and travel is either not possible, desirable or encouraged.	Movement within local areas is possible but trips are not being booked within their province or territory.	Residents are booking trips within their province or territory.	Residents are booking trips within the country, across provincial or territorial boundaries.	Some international travel, such as family related or urgent business. Some leisure travel from less risk averse travellers.	Some business travel is re-introduced and leisure travel is closer to pre-COVID-19 levels.

According to Destination Canada's travel sentiment data, as of **June 20**:

- Alberta has progressed into the **Inter-provincial (IV)** phase of recovery, where it joins Yukon and Nunavut.
- Ontario and Nova Scotia have progressed into the **Intra-provincial (III)** phase, where they join British Columbia, Quebec, New Brunswick, Prince Edward Island, Newfoundland and Labrador and Northwest Territories.
- Saskatchewan and Manitoba remain in the **Hyper-local (II)** phase.

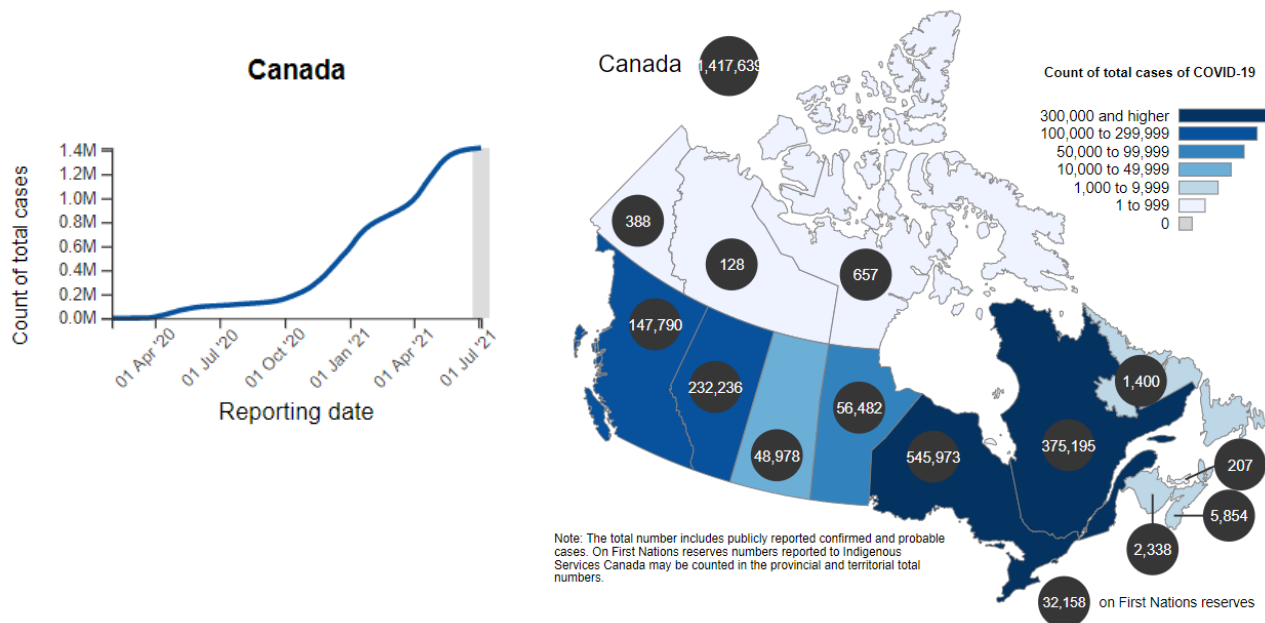
# Government of Canada COVID-19 Status

Updated July 5, 2021



# Government of Canada – COVID-19 Count of *Total* Cases

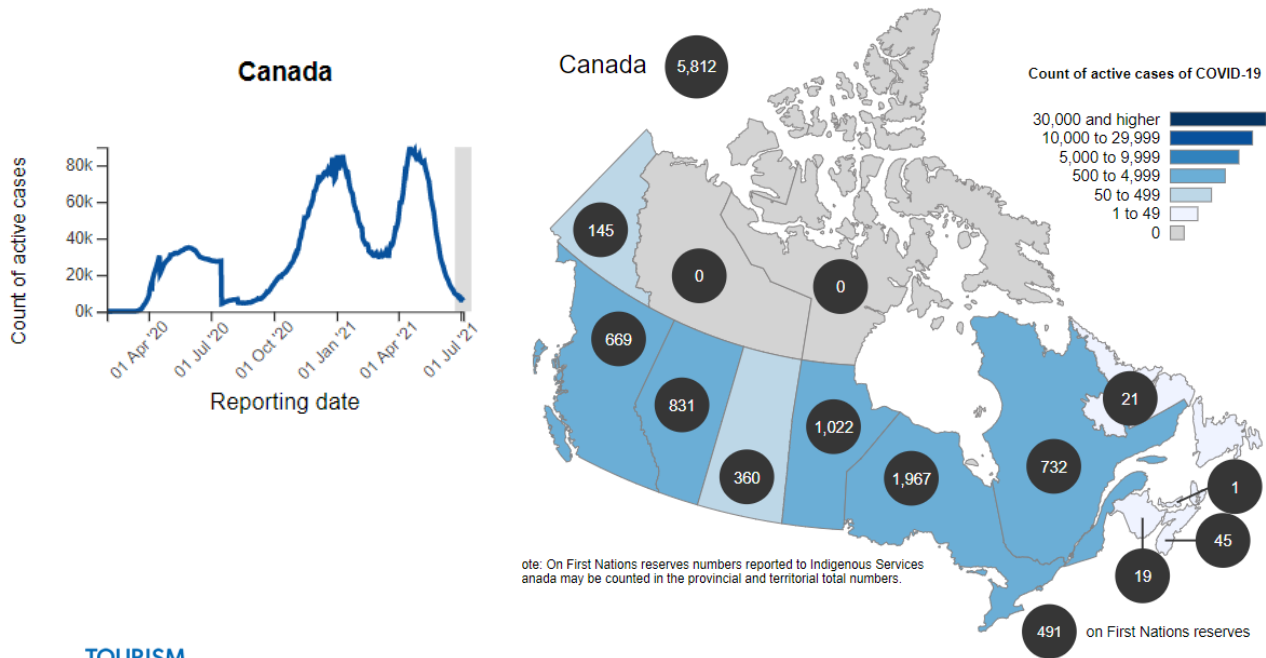
The count of total cases of COVID-19 in **Canada** was **1,417,639** as of July 5, 2021.



# Government of Canada – COVID-19

## Count of *Active* Cases

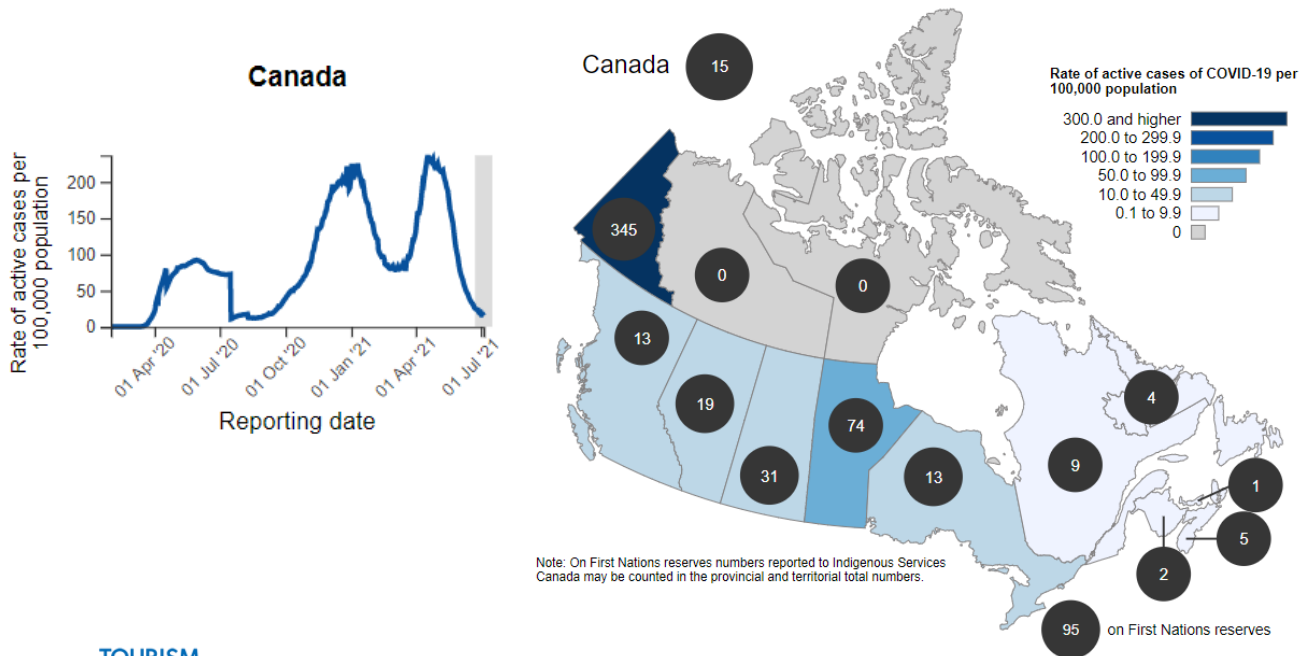
The count of active cases of COVID-19 in **Canada** was **5,812** as of July 5, 2021.



# Government of Canada – COVID-19

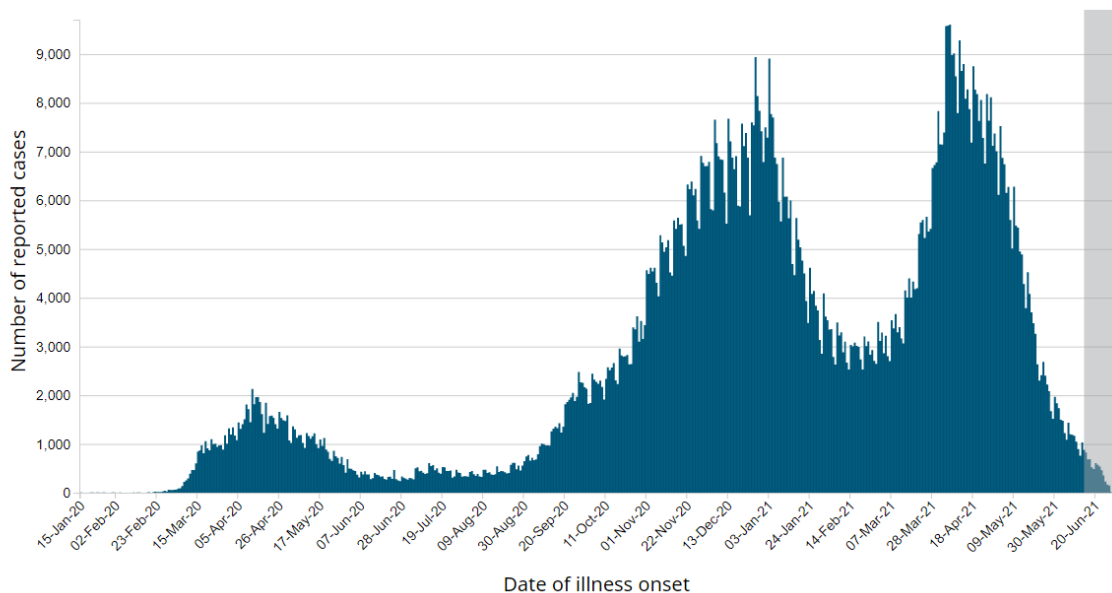
## *Rate of Active Cases*

The rate of active cases of COVID-19 in **Canada** was **15 per 100,000 population** as of July 5, 2021.



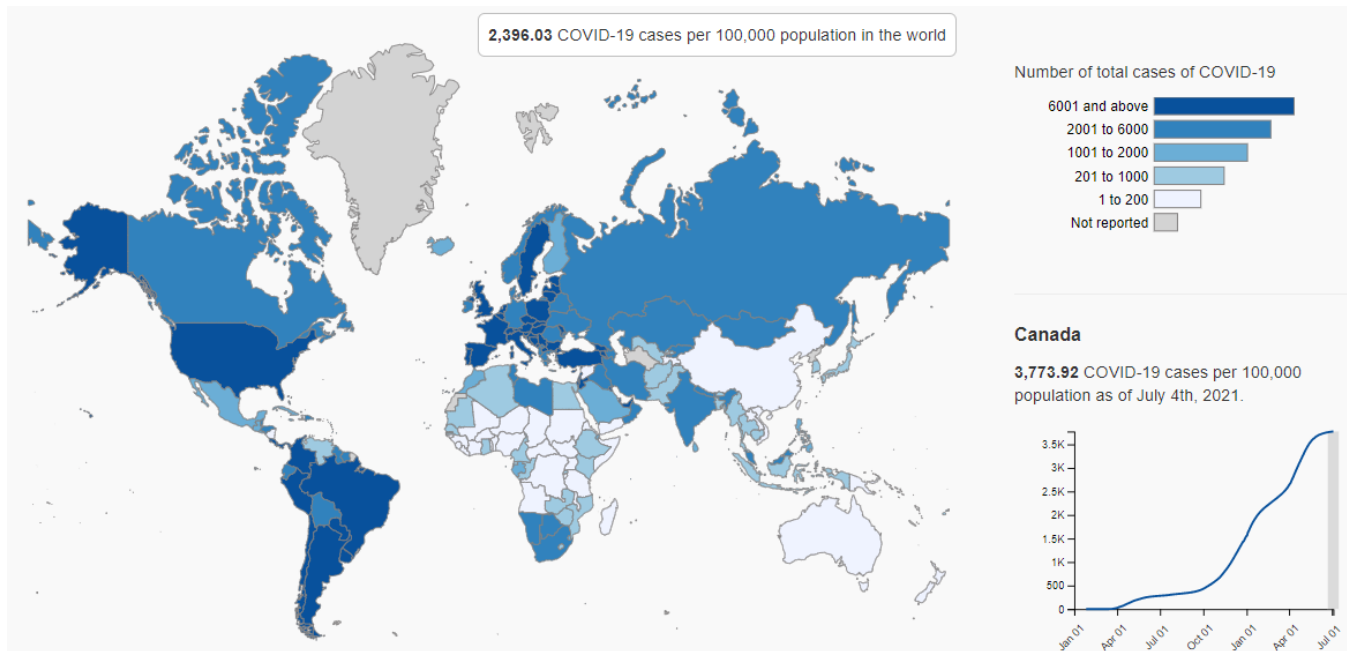
# Government of Canada – COVID-19 Cases by *Date*

Total COVID-19 cases in Canada (n=1,414,929) by date of illness onset, as of July 2, 2021.



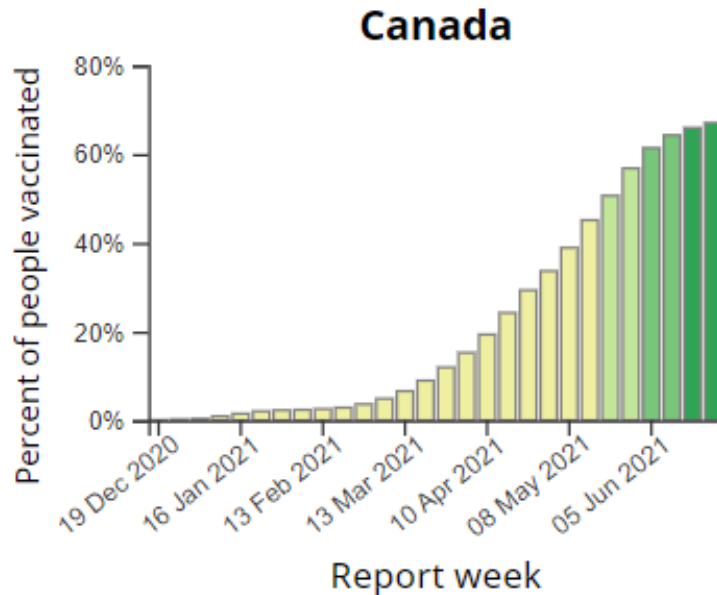
# Government of Canada – COVID-19

## World Cases Per 100,000 People



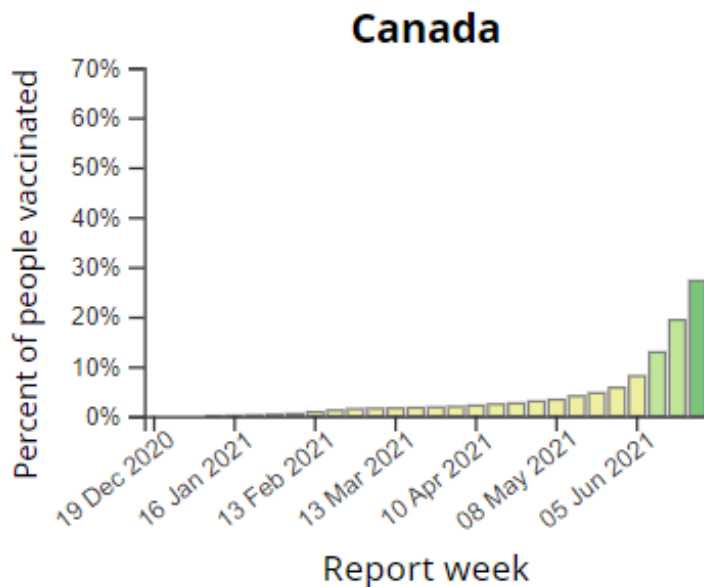
# Government of Canada – Percentage With At Least 1 Vaccine Dose

The cumulative percent of the population who have received **at least one dose** of a COVID-19 vaccine in Canada was **67%** as of June 26, 2021.



# Government of Canada – Percentage Fully Vaccinated

The cumulative percent of the population **fully vaccinated** with a COVID-19 vaccine in Canada was **27%** as of June 26, 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

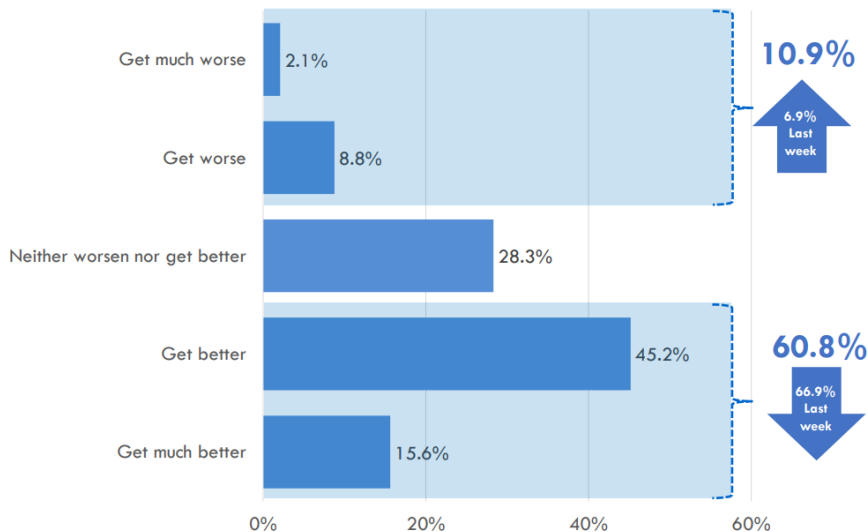
Updated to June 22, 2021

# Destination Analysts: Pandemic Outlook Darkens Among US Travellers

**Question:** In the NEXT MONTH, how (if at all) do you expect the severity of the coronavirus situation in the United States to change? (Select one)

In the next month the coronavirus situation will \_\_\_\_\_

(Base: Wave 67 data. All respondents, 1,200 completed surveys. Data collected June 16-18, 2021)

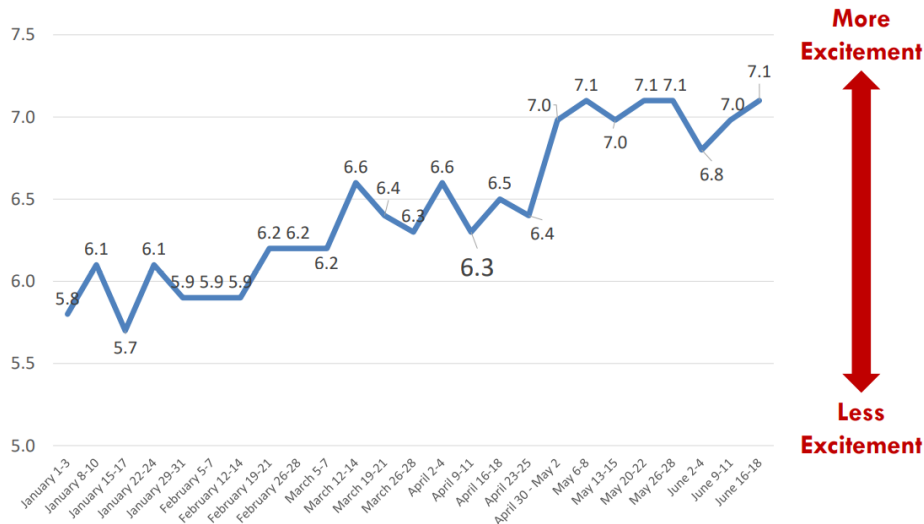


- Optimism is declining among American travellers about the immediate future of the pandemic. Although most say the situation will improve over the next month, an increasing share say things will get worse.

# Destination Analysts: Excitement About Leisure Travel Has Stabilized

- In the US, excitement about leisure travel, and in learning about new travel experiences, has largely plateaued since early May.

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



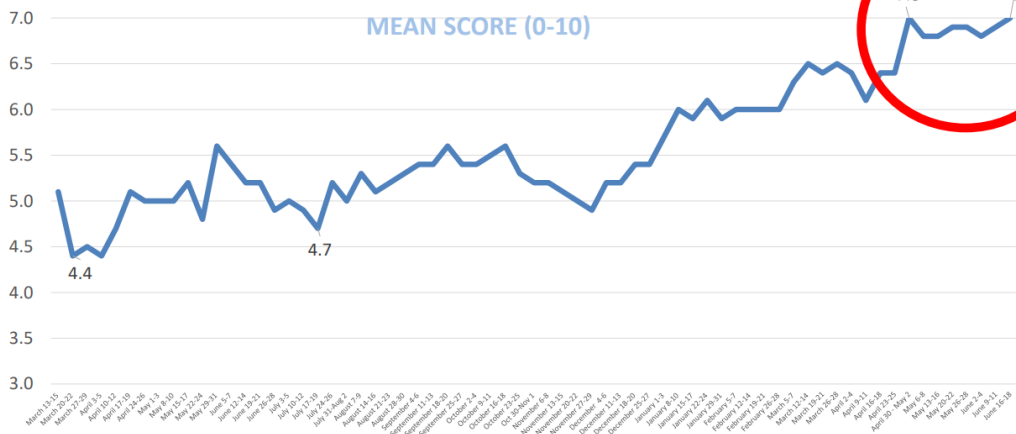
# Destination Analysts: Excitement About Leisure Travel Has Stabilized

**Question:** At this moment, how excited are you in learning about new, exciting travel experiences or destinations to visit?

More  
Open

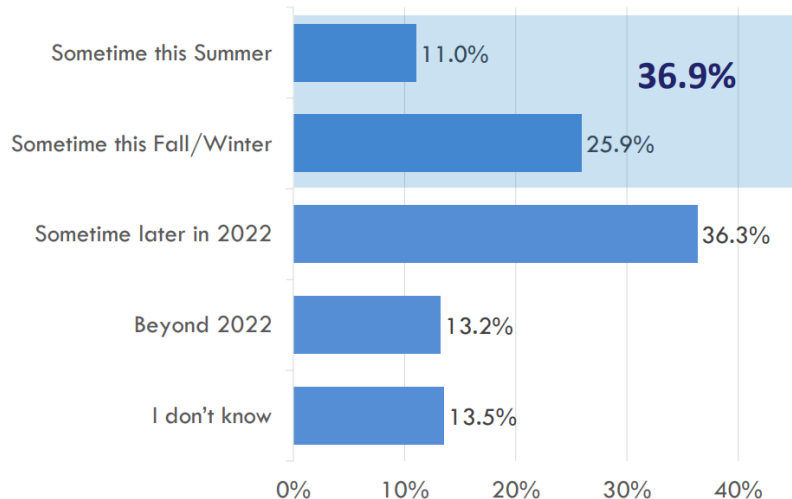


Less  
Open



# Destination Analysts: Americans Split on When They'll be Ready to Travel

**Question:** When do you expect that you will be ready to travel? (Select one)

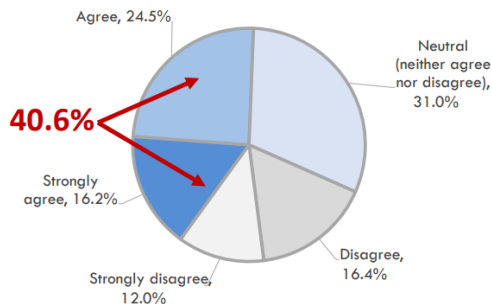


- Roughly one-third of American travellers say they'll be ready to travel in 2021, while another third don't expect to be ready until 2022. More than 1 in 10 say they won't be ready until after 2022.

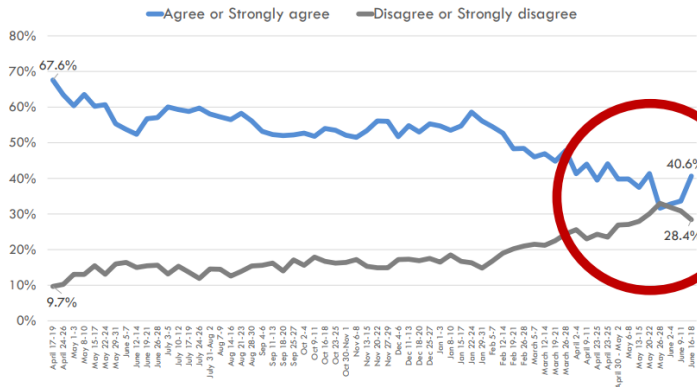
# Destination Analysts: US Welcoming Sentiment Wanes

How much do you agree with the following statement?

**Statement:** I do not want travelers coming to visit my community right now.



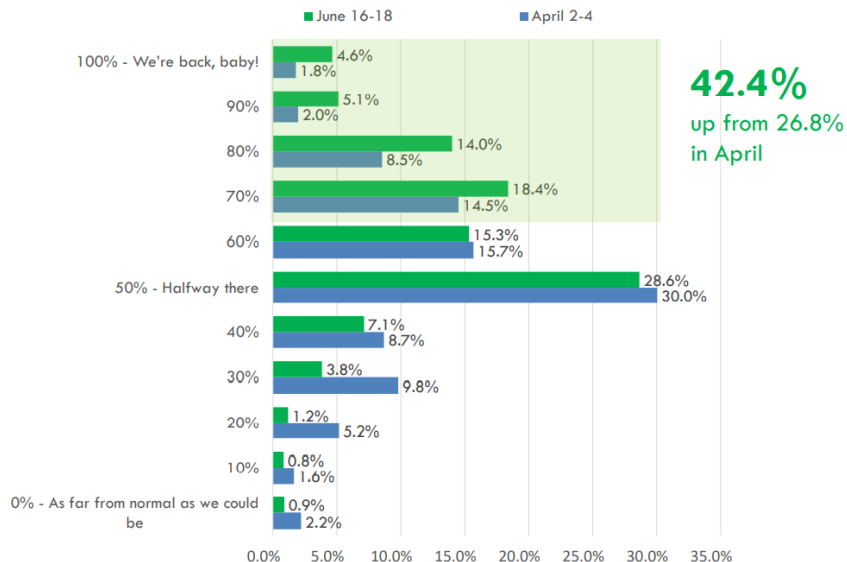
Historical data



- An increasing number of US travellers say they do not want other travellers visiting their home communities at the present time.

# Destination Analysts: Sense of Return to Normal For Leisure Activities Increases

**Question:** Overall, how close to “normal” is the U.S. in terms of resuming leisure activities (dining out, travel, etc.)?



- Although still a minority, the share of US travellers who think their country is close to resuming 'normal' leisure activities has increased notably since April.

