



DESTINATION CANADA 2021 Global Tourism Watch COVID Special Survey

May 2021

TOURISM
NOVA SCOTIA 

GLOBAL TOURISM WATCH METHODOLOGY

- Online survey with 9,050 respondents from across Canada (excluding the Territories).
- Conducted in **May 2021**.
- ***In-Province Travel*** and ***Out-of-Province Travel*** questions focused on pleasure / vacation travel:
 - Reports trips of one or more nights, where at least one night is spent in paid accommodations.
 - Excludes travel solely for business purposes, cottage trips, and trips for personal reasons (e.g., to attend weddings/funerals, for medical reasons, etc.).
 - Respondent base includes those who have taken a pleasure trip in the past three years.
- Questions were asked of a sample representative of the general Canadian population.
- Results are reported for the most recent (May) wave of the survey. Previous waves in June, July, August, and November 2020.

SUMMARY

IN-PROVINCE TOURISM DEMAND

- **Three-quarters of Nova Scotians** are *seriously considering* a vacation trip within the province in the next year.
- The most popular destinations are **Cape Breton**, the **Annapolis Valley**, the **Halifax waterfront**, and **Lunenburg**. At least three in 10 Nova Scotians would seriously consider visiting each of these places.
- **Peggy's Cove** is mentioned as a likely destination by one-quarter of Nova Scotians.

OUT-OF-PROVINCE TOURISM DEMAND

- Among Canadians who have taken out-of-province pleasure trips in recent years, **30% report having visited Nova Scotia on a vacation trip** that included at least one night in paid accommodation. This is the highest percentage of any Atlantic province, and the fifth-highest of any province, after British Columbia, Ontario, Quebec, and Alberta.
- One-third of Canadian out-of-province pleasure travellers (34%) are *seriously considering* a visit to Nova Scotia in the next year, and **14% are actively planning a visit to Nova Scotia** – again, the highest percentage of any Atlantic province and the fifth-highest of any province.

TRAVEL AND SAVING DURING THE PANDEMIC

- Since the beginning of the pandemic last year, **four in 10 Canadians have travelled within their own province**, while just over **one in 10 have travelled to other parts of the country**.
- **Fewer than one in 10 have travelled internationally** since the start of the pandemic.
- The main reason for travel to all destinations since the start of the pandemic was **leisure**, followed by **visiting friends and relatives**.
- About half of Canadians say they've saved more money than usual during the pandemic, and of those, more than half say they'll **spend the savings on travel**.

TRAVEL INTENT

- **The pandemic has spurred greater interest in domestic travel among Canadians**, who are planning more travel within the country once COVID-19 restrictions ease than they undertook in 2019.
- For example:
 - More Canadians are planning a single *domestic* vacation trip in the 12 months post-COVID (49%) than the percentage that took such a trip in 2019 (40%).
 - More Canadians are planning a single vacation trip *within their province* (30%) post-COVID, compared to 24% who took such a trip in 2019.
 - 53% made no trips to *other parts of Canada* in 2019. Post-COVID, only 41% say they aren't planning any travel to other parts of the country.
- Six in 10 Canadians are **likely to travel domestically in the next year** for leisure, and to visit friends and relatives. Among those, however, only one-third are likely to leave their own province and **visit other parts of Canada**.

TRAVEL INTENT

- Canadians are **more comfortable with domestic than international travel**, with one-third already comfortable travelling domestically versus only 11% comfortable travelling internationally.
 - **Domestic travel:** 25% will not travel domestically until they are fully vaccinated, and 26% will not do so until the majority of the population at their destination is fully vaccinated.
 - **International travel:** 18% will not travel internationally until they're fully vaccinated, and 32% will not do so until the majority of the population at the destination is fully vaccinated.
 - While one-quarter of Canadians is now comfortable staying in **hotels**, only 13% are comfortable travelling by **air**.
- Seven in 10 Canadians would consider visiting one of 12 **major Canadian cities (including Halifax) in the next year**. Among those not willing to consider this type of travel, the main reasons are a dislike of city crowds, the risk of exposure to COVID-19, and the high number of COVID-19 cases in cities. One-quarter say they already live in a city and need a change of scenery.

TRAVEL INTENT

- **Timing:** Nearly four in 10 Canadians are interested in travelling **domestically** this coming **fall**. Meanwhile ...
 - More than half are interested in **domestic** travel **next spring and summer**. Two in 10 are not interested in any domestic travel from now until the end of 2022.
 - Almost 2 in 10 are interested in travelling **internationally** this **fall**, while four in 10 are interested in international travel **next spring and summer**.
- There is **pent-up demand for travel among Canadians, with six in 10 reporting they can't wait to get out and travel again**. Most of that demand is focused on outdoor attractions and activities, at familiar destinations. There is less appetite for new destinations and for indoor activities.
- A list of travel offers and incentives attracts the interest of only a small minority of Canadians. Among those offers, full ticket refunds are the top contender.

IN-PROVINCE TOURISM DEMAND

IN-PROVINCE: SERIOUSLY CONSIDERING VISITING

	NS Residents
NET Nova Scotia	76
Cape Breton	44
Annapolis Valley	38
Halifax waterfront area	36
Lunenburg	31
Peggy's Cove	23
Bay of Fundy	19
Yarmouth	18
Pictou	14
Other region in Nova Scotia	8
SAMPLE SIZE	213

- You may have already mentioned this before, but which destinations would you seriously consider visiting in the next year?
- Table shows % of Nova Scotia residents selecting each region.

- Overall, 76% of Nova Scotians are considering an in-province vacation in the next year.
- Cape Breton is the most commonly selected region, followed by Annapolis Valley, the Halifax waterfront, and Lunenburg.

IN-PROVINCE: ACTIVELY PLANNING TO VISIT

	NS Residents
Cape Breton	14
Annapolis Valley	12
Halifax waterfront area	11
Lunenburg	9
Bay of Fundy	7
Yarmouth	7
Pictou	7
Peggy's Cove	6
SAMPLE SIZE	133

- Which of the following best describes your current situation when thinking about each of the following destinations for a vacation trip?
 - Table shows % of Nova Scotia residents in Active Planning (gathering information, planning a visit, deciding, or already booked).
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- Relatively few Nova Scotians are actively planning a future visit within the province.
 - Nova Scotia residents are most likely to be actively planning their visits to Cape Breton, Annapolis Valley, or Halifax waterfront.

OUT-OF-PROVINCE TOURISM DEMAND

OUT-OF-PROVINCE: EVER VISITED

	Canadians	NS Residents
Alberta	39	41
British Columbia	44	38
Manitoba	18	13
New Brunswick	26	70
Newfoundland and Labrador	11	35
Northwest Territories	3	1
Nova Scotia	30	-
Nunavut	2	2
Ontario	42	67
Prince Edward Island	24	67
Quebec	42	52
Saskatchewan	17	12
Yukon	6	4
SAMPLE SIZE	4525	200

- Which of the following destinations have you ever visited on a vacation trip which was 2 or more nights long, where you spent at least 1 night in paid accommodation?
- Table shows % selecting each province.

- Among recent out-of-province Canadian pleasure travellers, 30% have ever been to Nova Scotia on vacation.
- Among such travellers, Nova Scotians are most likely to have taken a vacation in New Brunswick, PEI, and Ontario.

OUT-OF-PROVINCE: CONSIDERING / PLANNING A VISIT

	Canadians
Considering visiting Nova Scotia	34
Active Planning a visit to Nova Scotia	14

- You may have already mentioned this before, but which destinations would you seriously consider visiting in the next year? / Which of the following best describes your current situation when thinking about each of the following destinations for a vacation trip?
- Table shows % of Canadians selecting each region, and are in Active Planning (gathering information, planning a visit, deciding, or already booked).
- One-third of recent, out-of-province Canadian pleasure travellers are seriously considering visiting Nova Scotia in the next year.
- More than one in 10 such travellers are actively planning a trip to Nova Scotia.

TRAVEL AND SAVING DURING THE PANDEMIC

TRAVEL SINCE START OF THE PANDEMIC

	Canadians	NS Residents
NET Domestic travel	41	51
Within your province	39	48
Other parts of Canada	13	17
NET International	6	2
The United States	4	2
Other countries (outside of the United States)	4	1
SAMPLE SIZE	9050	413

- Have you travelled to the following destinations since April 2020?
- Table shows % selecting each type of location.

- Since the beginning of the pandemic in April 2020, four in 10 Canadians have travelled *within their own province*, while more than one in 10 have travelled to *other parts of the country*.
- In comparison to other Canadians, more Nova Scotians have travelled *domestically*, particularly *within their own province*.
- Very few Canadians have travelled *internationally* since the beginning of the pandemic.

REASONS FOR TRAVEL DURING THE PANDEMIC

	Within your Province		Other Parts of Canada	
	Canadians	NS Residents	Canadians	*NS Residents
Leisure/Pleasure	65	65	51	51
Visiting Friends and Relatives	41	53	48	54
Business / Conference / Convention	11	7	17	14
SAMPLE SIZE	3830	201	1144	28

- For what reason(s) did you travel to the following destination(s) since April 2020?
- Table shows % selecting each reason, from among those who travelled for each type of destination.
- * Note: very low sample size for out-of-province travel among Nova Scotia residents.
- The most common reason for travel to all destinations since the start of the pandemic has been *pleasure*, followed by *visiting friends and relatives*.
- Travelling for *pleasure* has been particularly important among in-province travellers, as compared to other domestic travel.
- Both *pleasure* and *visiting friends and family* account for about half of travel to the *rest of Canada*.

PANDEMIC SAVING, SPENDING

How Savings Will Be Spent	Canadians	NS Residents
Travel	55	54
Longer-term savings	44	34
Home renovations or decorating	30	39
Buying a car	17	18
Electronics	15	14
Purchasing a home	15	7
All of the above	3	2
SAMPLE SIZE	4731	202

- Have you been saving more money than usual during the COVID-19 pandemic (from March 2020 until now)? / Which of the following are you intending to spend the money you have been saving on?
- Table shows % selecting each item.

- About half of Canadians – and Nova Scotians – say they have been saving more money than usual during the pandemic.
- Among these savers, more than half say that *Travel* is the most common item they plan to direct their extra savings toward, followed by *long-term savings*.

TRAVEL INTENT

TRAVEL COMPARISON, PRE-AND-POST-COVID

		Pre-COVID	Post-COVID
NET: Domestic travel	No travel	28	21
	1 Trip	40	49
	2 Trips	27	32
	3+ Trips	26	25
Within your province	No travel	35	26
	1 Trip	24	30
	2 Trips	19	22
	3+ Trips	23	22
Other parts of Canada	No travel	53	41
	1 Trip	25	34
	2 Trips	13	15
	3+ Trips	10	10
SAMPLE SIZE		9050	

- How many vacation trips did you take to the following destinations in 2019? / Thinking ahead to when COVID-19 is no longer a consideration, approximately how many vacation trips do you plan to take to the following destinations in the 12 months after government restrictions allow?
- Table shows % of Canadians selecting each number of trips for each type of destination.
- The pandemic has triggered greater interest in *domestic travel* among Canadians, who are planning more such trips once travel restrictions ease, than they undertook in 2019 before the pandemic started.

LIKELIHOOD OF TRAVEL, BY PURPOSE AND DESTINATION

	PLEASURE		VFR		BUSINESS	
	Canadians	NS Residents	Canadians	NS Residents	Canadians	NS Residents
NET Domestic	58	59	62	62	20	18
Within your province	54	54	58	58	17	14
Other parts of Canada	36	38	36	39	12	9
NET International	36	27	27	19	10	6
United States	25	17	18	13	8	4
Other countries	26	20	18	23	8	4
SAMPLE SIZE	9050	413	9050	413	9050	413

- How likely are you to travel in the next year for the following reasons as government restrictions allow?
- Table shows % selecting definitely / very likely for each reason and type of destination.
- Six in 10 Canadians are likely to travel *domestically* in the next year for *pleasure*, and to *visit friends and relatives*.
- Among those, only one-third are likely to visit *other parts of Canada*.
- Canadians are more likely than Nova Scotians to be planning *international travel*, regardless of reason.

TIMING OF COMFORT WITH TRAVEL

	Already Comfortable	Personally Fully Vaccinated	Majority Population Vaccinated
NET Domestic	32	25	26
Travelling to other parts of Canada	17	18	22
Travelling within your province	31	17	17
NET International	11	18	32
Travelling to the United States	10	15	24
Travelling to other countries	9	14	27
Travelling by plane	13	16	28
Staying in a hotel	26	15	22
SAMPLE SIZE	9050		

- When do you think you'll feel comfortable participating in each of these activities again?
- Table shows % of Canadians selecting level of comfort for each type of activity.
- One-third of Canadians are already comfortable with *domestic travel*.
- However, one-quarter will not travel *domestically* until they are *fully vaccinated*, and until the *majority of the population* at their destination is vaccinated.
- Few are comfortable with international travel.
- Only 13% say they are comfortable travelling by air.

TRAVEL TO CANADIAN CITIES

	Canadians	NS Residents
Cities are too crowded	31	36
Risk of being exposed to/getting COVID-19	31	50
High number of COVID-19 cases in cities	31	46
I want a change of scenery as I already live in a city	26	10
Concerns that COVID-19 protocols are not being properly followed	26	42
Cities are more expensive than other destinations	23	30
I do not enjoy visiting cities	22	24
I am worried that attractions/businesses will be closed because of COVID-19	21	25
The possibility of infecting others with COVID-19 upon arrival or return	14	24
I'm not comfortable staying in a hotel at this time	14	17
I'm not comfortable getting on a plane at this time	12	27
Too far away from where I live	8	12
It is not a welcoming environment	8	8
None of my friends/family want to visit a city	7	11
Negative reaction from residents in response to visitors	6	7
SAMPLE SIZE	2511	133

- Which of the following are reasons why you would not consider visiting a larger Canadian city in the next year?
- Table shows % selecting each reason, from among respondents who are not considering any of 12 larger Canadian cities.
- Seven in 10 Canadians would consider visiting a major Canadian city in the next year. Nova Scotians are slightly less likely than Canadians in general to be willing to visit a major Canadian city.

TRAVEL TIMING THROUGH 2022

	Fall 2021		Winter 2022		Spring 2022		Summer 2022		Fall 2022		Not Interested	
	Can.	NS	Can.	NS	Can.	NS	Can.	NS	Can.	NS	Can.	NS
NET Domestic	37	43	13	10	22	19	31	30	16	20	22	23
Within your province	29	34	10	8	15	13	22	20	13	16	9	8
Other parts of Canada	19	21	7	4	14	12	22	22	10	13	19	21
NET International	16	10	16	12	19	15	21	14	18	12	46	64
United States	12	9	8	7	11	6	14	9	10	8	38	54
Other countries	8	3	11	9	13	12	14	8	13	8	31	48
SAMPLE SIZE	9050	413	9050	413	9050	413	9050	413	9050	413	9050	413

- Please indicate when you would be interested in travelling to the following destinations.
- Table shows % of Canadians or NS residents selecting each season for each type of destination.
- Nearly four in 10 Canadians are interested in travelling *domestically*, and close two in 10 *internationally*, in the **fall of 2021**.
- The numbers rise overall for next **spring and summer**, when more than half are interested in travelling *domestically*, and four in 10 *internationally*.
- While half of Nova Scotians express interest in *domestic* travel next **spring and summer**, four in 10 are interested in *domestic travel this fall*, with most of that interest focused on travel inside the province.

ATTITUDES TOWARD TRAVEL

	Canadians	NS Residents
I miss travel. I can't wait to get out and travel again	63	62
I will visit and participate in outdoor attractions and activities	59	55
I will visit destinations that I know well or have visited before	57	61
I will visit new destinations that I have never visited before	47	40
I will only do one or two things per day to limit social interaction	46	49
I will visit and participate in indoor attractions and activities	39	34
I will fill my days with as many attractions/activities as possible	33	30
I feel safe travelling now	25	15
SAMPLE SIZE	9050	413

- Thinking of your next vacation, as government restrictions allow, how much do you agree or disagree with the following statements?
- Table shows % strongly/somewhat agree with each statement.
- There is pent-up demand for travel among both Nova Scotians and other Canadians, with six in 10 reporting they *can't wait to get out and travel again*.
- That pent-up demand is focused on *outdoor attractions and activities*, at *familiar destinations*. There is less appetite for *new destinations* and for *indoor activities*.
- Fewer Nova Scotians than other Canadians report feeling safe travelling *now*.

TRAVEL OFFERINGS, INCENTIVES

	Canadians	NS Residents
Full ticket refund	19	21
Discounted travel deal	17	16
Free cancellations	15	14
Government incentive program - discounted travel packages or passes	7	6
Government incentive program - travel expense rebate	5	3
Government incentive program - travel expense tax refund	4	3
Travel insurance offer	4	3
Waived booking fees	2	2
None would encourage me to make a travel booking in the near future	25	32
SAMPLE SIZE	9050	413

- Which one of the following offerings would most encourage you to make a travel booking in the near future?
- Table shows % selecting each type of incentive.
- There is very low interest in any of the potential travel booking incentives.
- Most commonly, one-quarter of Canadians, and one-third of Nova Scotians, indicate that *none* of the listed incentives would encourage them to book travel in the near future.
- Amid such low interest, full ticket refunds are the most commonly endorsed on the list.