

COVID-19

Recovery Signals Digest

A Roundup of
Travel Recovery Insights

Contents:

• Introduction	Page 3
• Source Notes and Methodology	Page 4
• Summary	Page 6
• Google Destination Insights	Page 8
• Statistics Canada: International Arrivals, July 2021	Page 12
• Environics Weekly Visitation Tracker	Page 15
• Destination Canada: Survey of Americans	Page 20
• Destination Canada Travel Recovery Assessment	Page 24
• Destination Canada Resident Sentiment Survey	Page 27
• Government of Canada COVID-19 Status	Page 39
• Destination Analysts American Travel Sentiment Tracker	Page 48

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

- **Google** is a US-based online search engine. Its *Destination Insights* ([Destination Insights with Google](#)) is a free public tool that uses Google search data for flights and accommodations as way of interpreting travel demand in particular destinations.
- **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. It's *Canadian Tourism Activity Tracker* (available monthly) combines data from multiple sources including counts of international travellers, commercial aircraft movements, hotel occupancy rates, restaurant sales and reservation bookings.
- **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/) 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/2020/04/2020-04-20-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

- Between July 5 and August 5, Halifax experienced the **highest percentage growth in online travel query demand of any Canadian destination city**, when compared with the previous 30-day period, according to Google's Destination Insights report. Meanwhile in that same period, Halifax was ranked seventh in terms of *absolute* query demand among Canadian cities.
- Statistics Canada says **international air arrivals into Canada were up substantially in July 2021** from July 2020. For example, 206,000 Canadians arrived from other countries at Canadian airports in July this year, compared to only 52,000 the same month last year. Still, volume remains sharply down from July 2019, when more than 930,000 Canadians arrived by air from abroad.
- **Overnight visitation to Nova Scotia** in late July was **down 4%** over the previous week (WoW), but **up 14%** compared with the same week the previous year (YoY), according to Environics' Weekly Tracker.
- A Destination Canada survey in July of US perceptions about travelling to Canada shows that more than half of Americans believe there are **COVID-19 related barriers to travelling to Canada** – specifically a border closure, travel bans, and the need for proof of vaccination status.

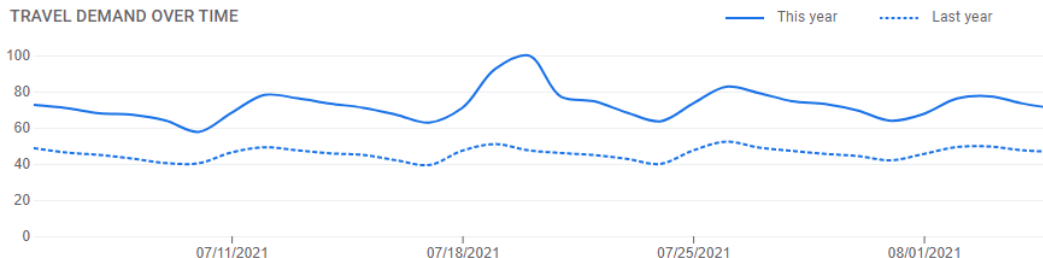
- **Nova Scotia has progressed** from the Intra-Provincial phase of recovery to the Inter-provincial phase, says the latest Destination Canada Travel Recovery Assessment. Only PEI and Newfoundland and Labrador remain in the Intra-Provincial phase.
- A slight majority of Canadians in most regions are **willing to welcome visitors to their community from other parts of the country**, according to Destination Canada's latest Resident Sentiment survey. Among the regions, only British Columbians and Atlantic Canadians remain shy of a majority indicating willingness in this regard.
- The federal government reports that the **number of active COVID-19 cases in Canada is increasing**, with more than 17,000 cases as of August 15, almost triple the number from two weeks earlier. Nationally, the **rate of active cases on** August 15 stood at 45 cases per 100,000 people, up from 16 per 100,000 in late-July. In Nova Scotia, the rate was three per 100,000 on August 15.
- Destination Analysts continues to track rising pessimism and declining interest in leisure travel among US travellers. Among the findings, for the first time since January, more than half of US travellers **expect the pandemic to get worse over the next month**.

Google Destination Insights

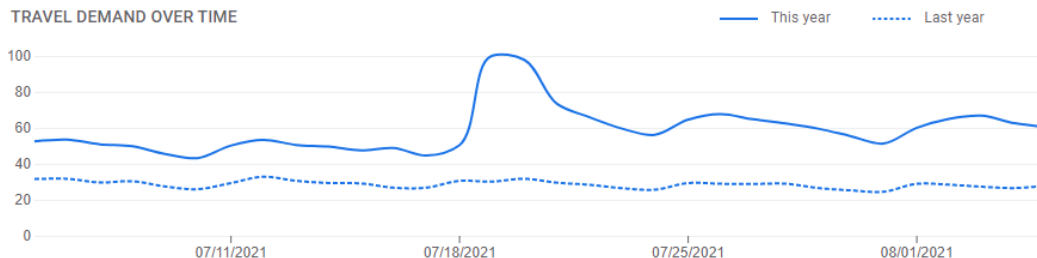
As of August 5, 2021

Google Destination Insights: 30-Day Demand for Canada as a Destination

Domestic travel demand (Google searches by Canadians for flights and accommodation) for trips within Canada. **July 5 – August 5, 2021.** Demand is scored by search volume on an index of 0-100.



International travel demand (Google searches worldwide for flights and accommodation) for trips to Canada. **July 5 – August 5, 2021.** Demand is scored by search volume on an index of 0-100.



Google Destination Insights: 30-Day Domestic Demand by Destination City

Cities are scored on an index of 0-100, based on domestic Google search demand by Canadians between **July 5 – August 5, 2021** for flights to, and accommodations in Canadian cities.

TOP DEMAND BY DESTINATION CITY

1	Vancouver	100	<div><div></div></div>
2	Toronto	82	<div><div></div></div>
3	Calgary	76	<div><div></div></div>
4	Montreal	44	<div><div></div></div>
5	Edmonton	35	<div><div></div></div>
6	Quebec City	27	<div><div></div></div>
7	Halifax	25	<div><div></div></div>
8	Kelowna	24	<div><div></div></div>
9	Victoria	22	<div><div></div></div>
10	Ottawa	22	<div><div></div></div>

Growth is the % *change* in domestic Google travel search demand in the period **July 5 – August 5, 2021** compared to the previous 30-day period.

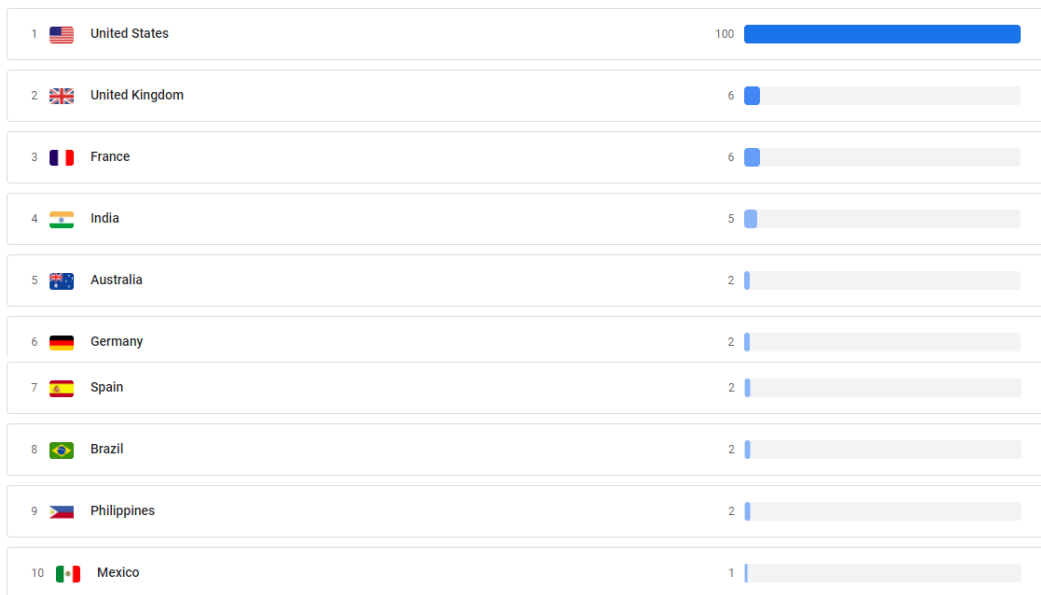
TOP GROWTH BY DESTINATION CITY

1	Halifax	Over 75%	↑
2	Niagara Falls	Over 75%	↑
3	Charlottetown	Over 75%	↑
4	Kingston	Over 75%	↑
5	Fredericton	Over 75%	↑
6	Rivière-du-Loup	Over 75%	↑
7	Quebec City	50% to 75%	↑
8	Ottawa	50% to 75%	↑
9	Winnipeg	50% to 75%	↑
10	Whistler	50% to 75%	↑

Google Destination Insights: 30-Day International Demand by Origin Country

Top sources of worldwide search demand for international travel to Canada. Search period: **July 5 – August 5, 2021**. Countries are scored by search volume, on an index of 0-100.

TOP DEMAND BY ORIGIN COUNTRY

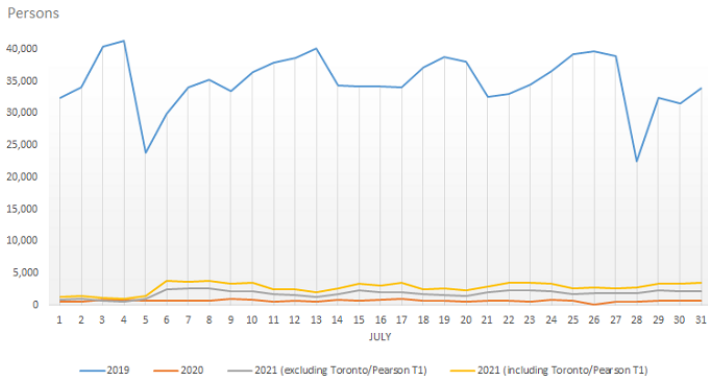


Statistics Canada: International Arrivals – July 2021

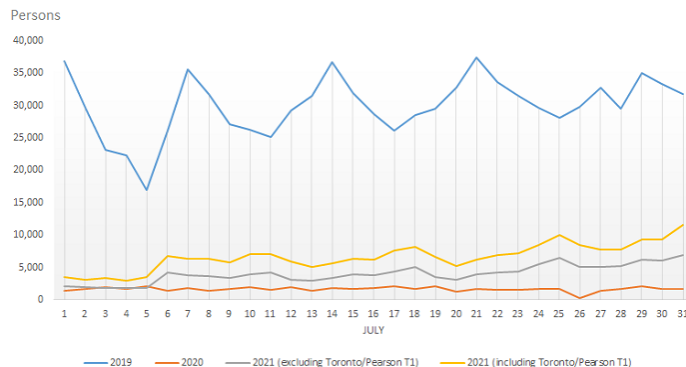
Released August 11, 2021

Statistics Canada: International Air Arrivals in July

Non-resident



Canadians



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

July 2021 – 86,000
 July 2020 – 22,000
 July 2019 – 1.1-million

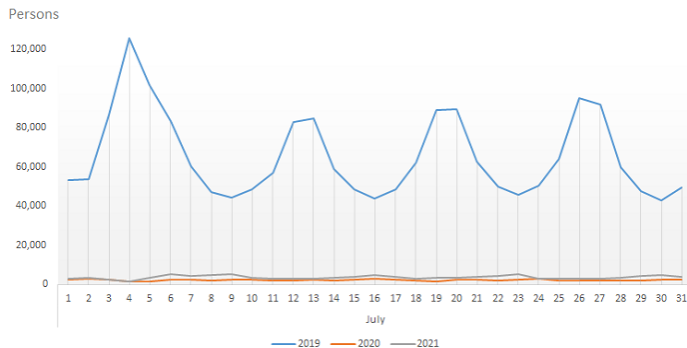
- **Canadians** arriving at Canadian airports:

July 2021 – 206,000
 July 2020 – 52,000
 July 2019 – 935,000

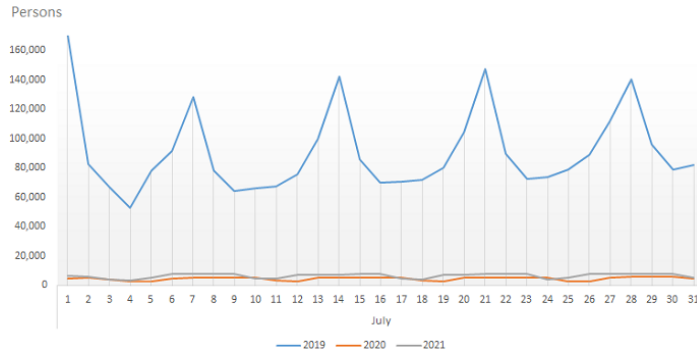
- **Air arrivals were up dramatically in July 2021** over July 2020, but remained sharply down from the same month in 2019.

Statistics Canada: International Road Arrivals in July

US residents



Canadians



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

July 2021 – 113,000

July 2020 – 71,000

July 2019 – 2-million

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

July 2021 – 202,000

July 2020 – 145,000

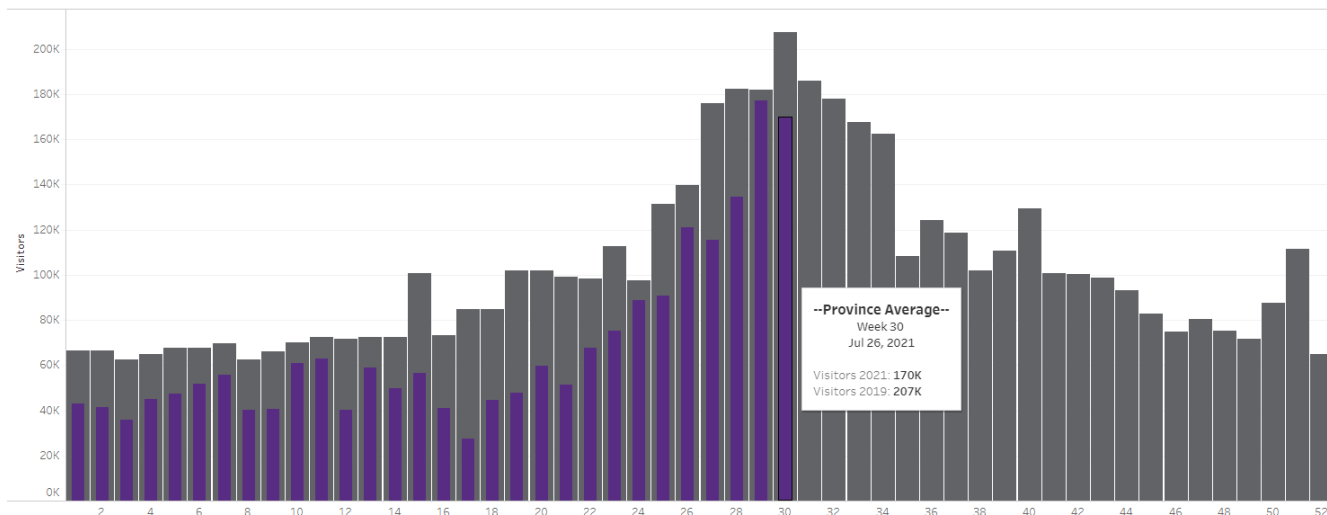
July 2019 – 2.8 million

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

Environics Analytics Weekly Visitation Tracker

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

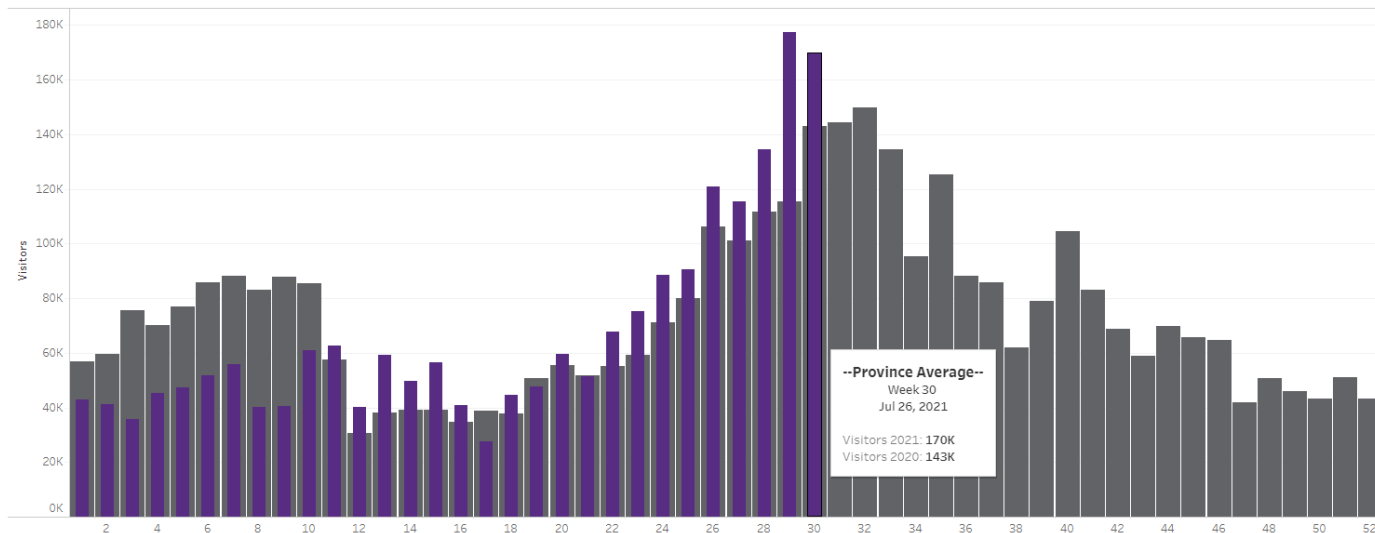
Data reflects number of overnight visitors to Nova Scotia. The Weekly Tracker uses data based on mobile phone movements (60+ kilometers overnight travel), which may differ from other visitation estimates.



- About **170,000** overnight visitors came to Nova Scotia the week of **July 26, 2021**, **down** from about 207,000 the same week in **2019**. Note that the previous week (July 19), the volume of visitors almost matched the pre-pandemic volume during the same week in 2019.

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

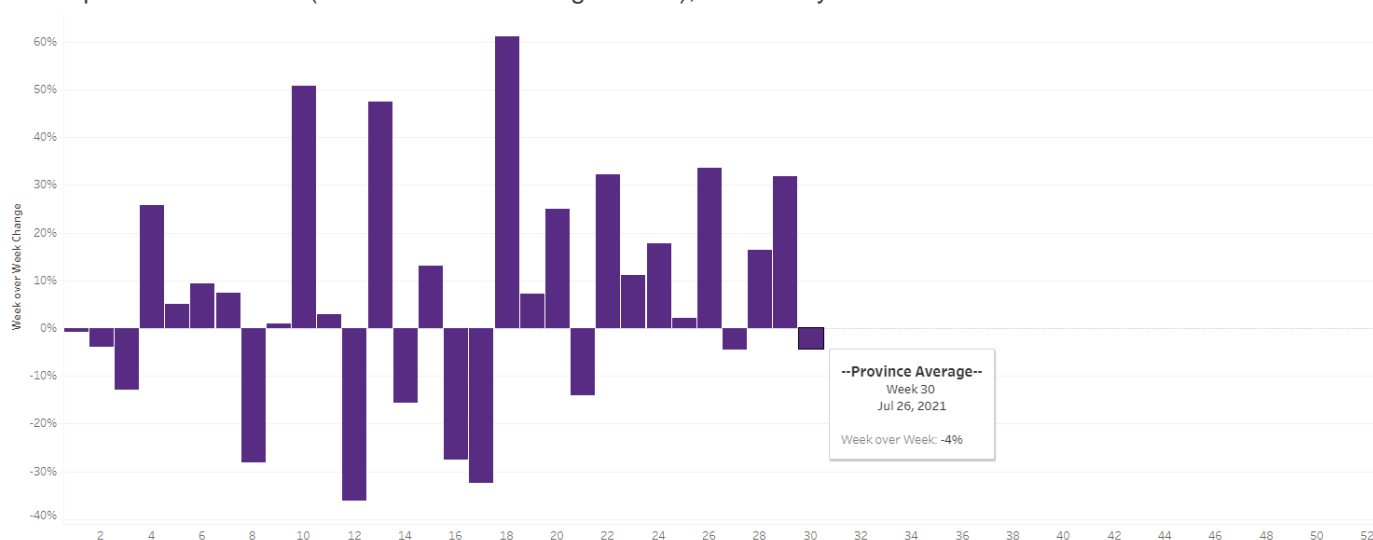
Data reflects number of overnight visitors to Nova Scotia. The Weekly Tracker uses data based on mobile phone movements (60+ kilometers overnight travel), which may differ from other visitation estimates.



- About **170,000** overnight visitors came to Nova Scotia the week of **July 26, 2021**, **up** from about 143,000 the same week in **2020**.

Environics Weekly Tracker – Week Over Week Change, Nova Scotia

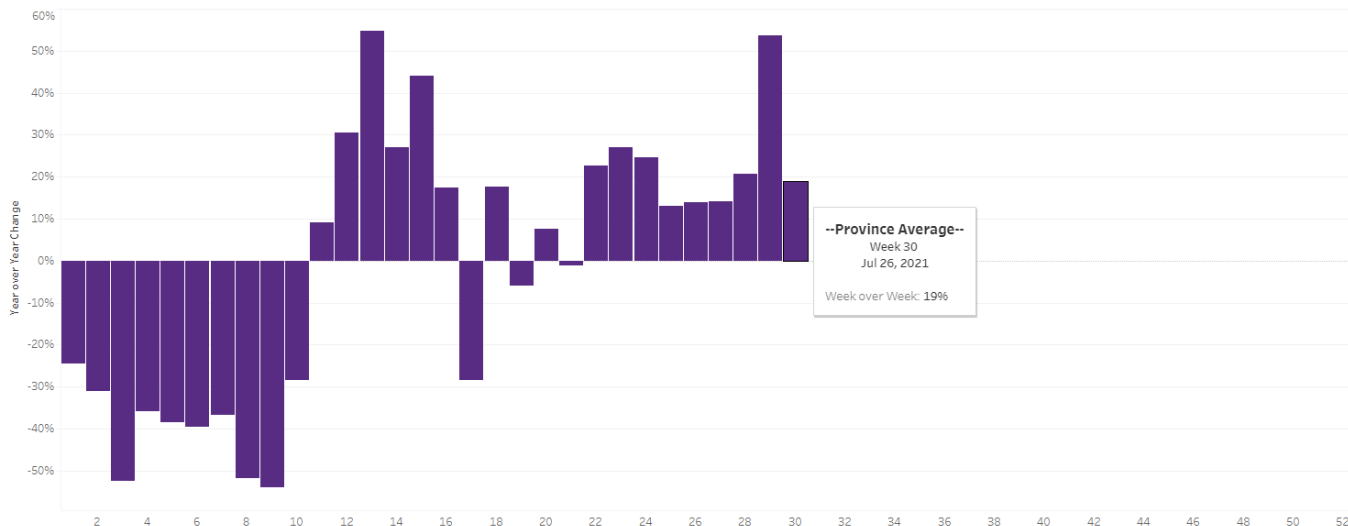
Data reflects number of overnight visitors to Nova Scotia. The Weekly Tracker uses data based on mobile phone movements (60+ kilometers overnight travel), which may differ from other visitation estimates.



- The week of **July 26, 2021**, overnight visitation to **Nova Scotia** was **down 4%** over the previous week (WoW). In comparison, **national** weekly overnight visitation was up 11% 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.



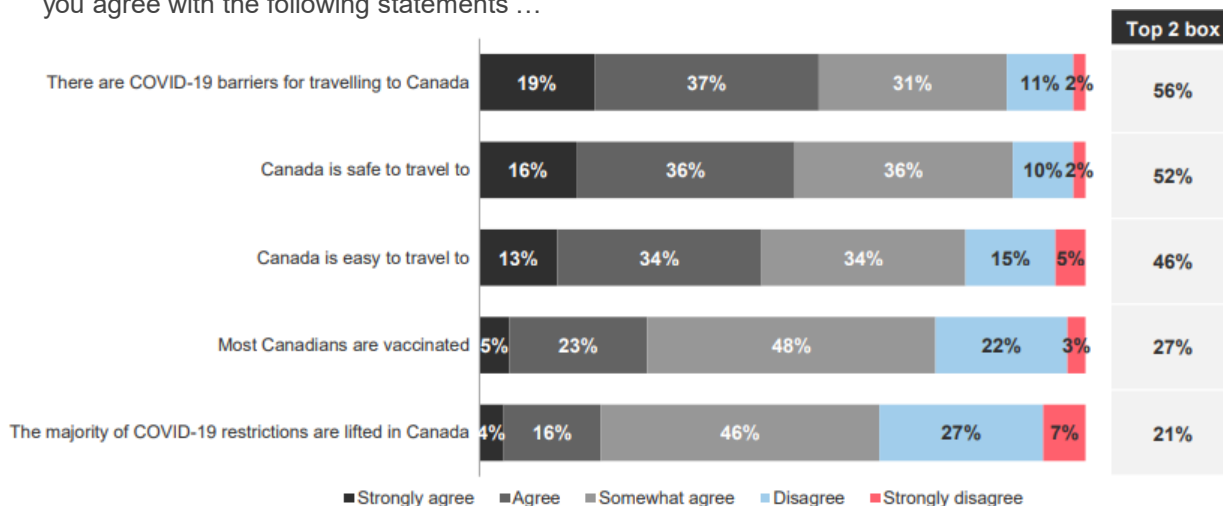
- The week of **July 26, 2021**, overnight visitation to **Nova Scotia** was **up 19%** over the same week the previous year (YoY). In comparison, **national** weekly overnight visitation was even (0%) YoY.

Destination Canada: Americans' Perception of Travelling to Canada

Selected results from an online survey of 1,005 Americans,
conducted July 9-12 2021

Destination Canada: Most Americans Believe Travel Barriers to Canada Remain

Q: On a scale of 1 to 5, with 1 being 'strongly agree' and 5 being 'strongly disagree', to what extent do you agree with the following statements ...

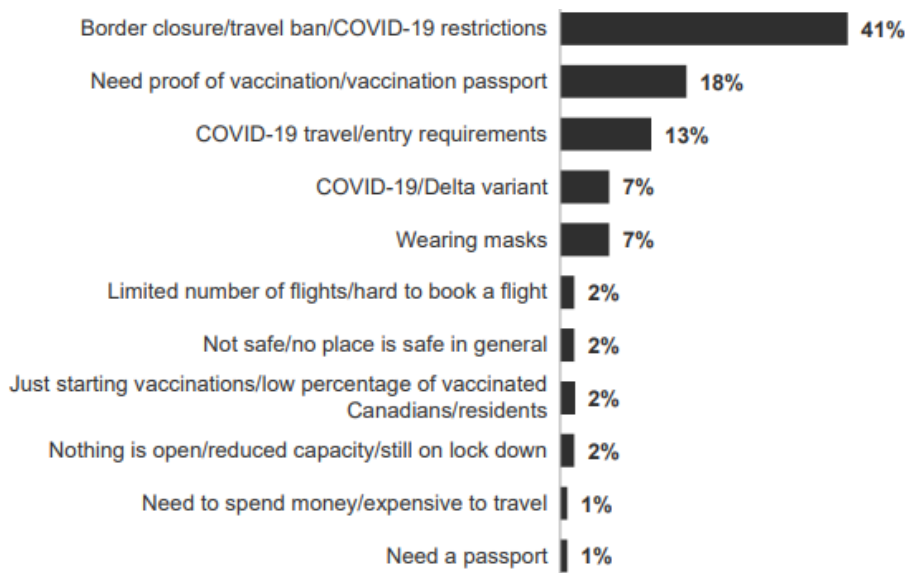


- More than half of US respondents believe there are COVID-19 barriers for travelling to Canada.
- While half believe Canada is safe to visit, only one-quarter think most Canadians are vaccinated.

Destination Canada: Reasons for Perceived Travel Barriers to Canada

Q: You mentioned 'There are COVID-19 barriers for travelling to Canada.' Please specify the main barriers that come to your mind ...

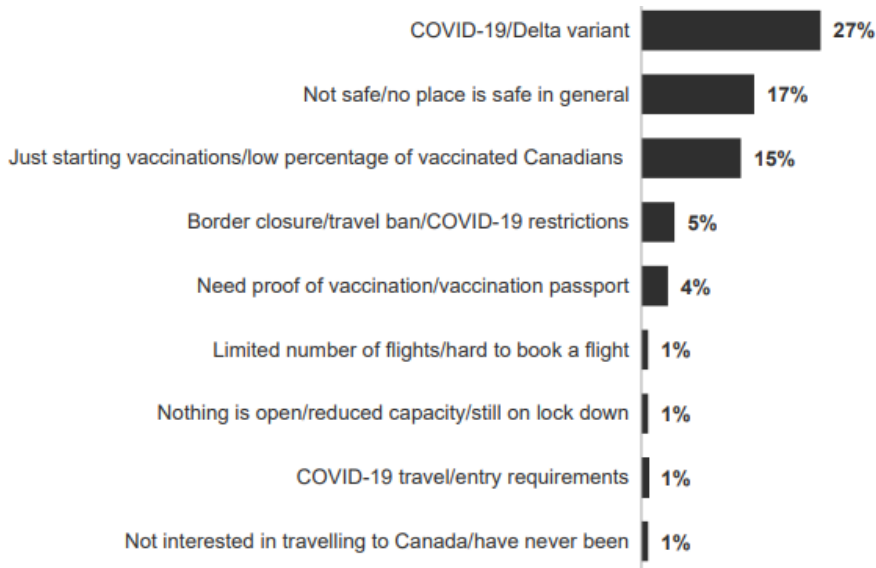
- The main pandemic restrictions Americans cite as barriers to visiting Canada are the border closure and related travel ban, proof of vaccination and other entry requirements.



Destination Canada: Reasons for Perception That Canada Is Unsafe

Q: You mentioned disagreeing with the statement, 'Canada is safe to travel to'. Please elaborate...

- Among respondents who consider Canada unsafe for travel, one-quarter say concerns over the COVID-19 Delta variant are the reason.
- 15% say they believe too few Canadians have been vaccinated.



Destination Canada: Travel Recovery Assessment

Destination Canada Provincial Travel Recovery Assessment

Timeline of overall assessment for each province and territory:

	16-Mar	23-Mar	30-Mar	06-Apr	13-Apr	20-Apr	27-Apr	04-May	11-May	18-May	25-May	01-Jun	08-Jun	15-Jun	22-Jun	29-Jun	06-Jul	13-Jul	20-Jul
British Columbia	III	III	III	III	III	II	II	II	II	II	II	II	II	III	III	IV	IV	IV	IV
Alberta	IV	IV	IV	IV	IV	IV	II	II	II	II	II	II	II	II	IV	IV	IV	IV	IV
Saskatchewan	II	II	II	II	II	II	II	II	II	II	II	II	II	II	II	IV	IV	IV	IV
Manitoba	II	II	II	II	II	II	II	II	II	II	II	II	II	II	II	II	IV	IV	IV
Ontario	II	II	II	II	II	II	II	II	II	II	II	II	II	II	III	IV	IV	IV	IV
Quebec	IV	IV	IV	IV	IV	IV	II	II	II	II	II	III	III	III	III	IV	IV	IV	IV
New Brunswick	III	III	III	III	III	III	III	III	III	III	III	III	III	III	III	III	IV	IV	IV
Nova Scotia	III	III	III	III	III	III	III	III	III	II	II	II	II	II	III	III	III	III	IV
Prince Edward Island	III	III	III	III	III	III	III	III	III	III	III	III	III	III	III	III	III	III	III
Newfoundland & Labrador	II	II	II	III	III	III	III	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	IV	IV	IV	IV	IV	IV	IV
Northwest Territories	III	III	III	III	III	III	III	III	III	III	III	III	III	III	III	III	IV	IV	IV
Nunavut	III	III	III	III	III	III	III	III	II	II	II	III	III	III	IV	IV	IV	IV	IV

Legend:

- Indicates a forward phase progression
- Indicates a backward phase regression

I	II	III	IV	V	VI
COVID-19 Response	Hyper Local	Intra-prov	Inter-prov	Tentative Int'l	Regularized Int'l

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 **July 20**:

- Nova Scotia has progressed from the **Intra-provincial (III)** phase into the **Inter-provincial (IV)** phase of recovery.
- Only Prince Edward Island and Newfoundland and Labrador remain in the **Intra-provincial (III)** phase.

Destination Canada: Resident Sentiment Survey

Updated August 10, 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	87	83	86	83	79	94	89	96
Communities in my province	75	77	81	77	81	91	87	94
Other provinces in Canada	55	61	60	61	62	45	37	49
The United States	17	34	33	24	28	7	7	8
Other countries	16	26	32	24	27	10	9	13
SAMPLE SIZE	207	205	200	612	411	201	124	77

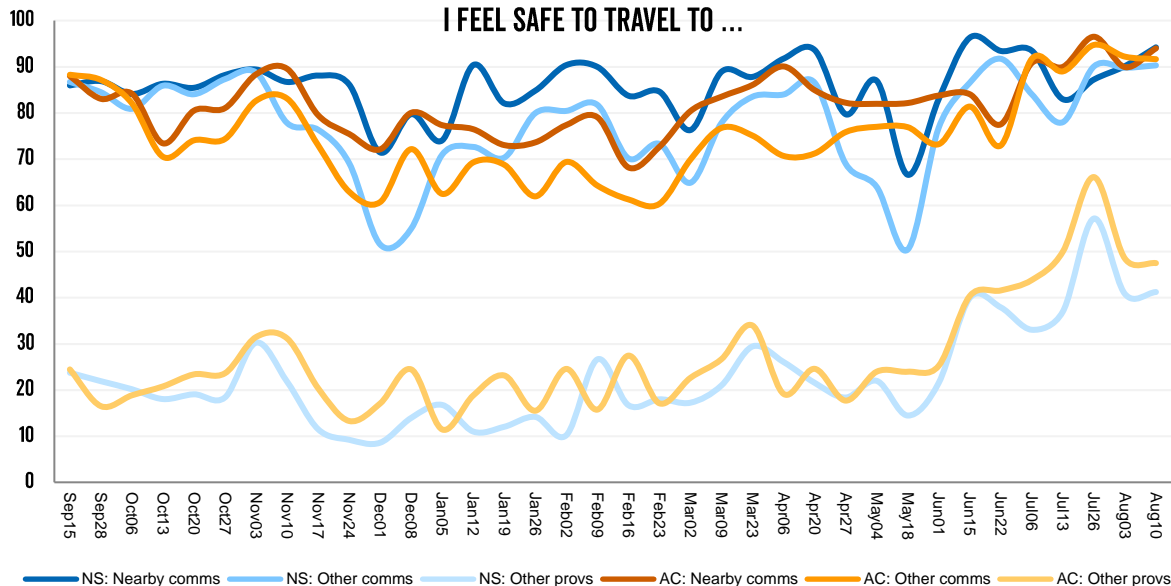
- % Somewhat / Strongly Agree
- Note: red/green text indicates a significant difference between regions.
- Results from week of August 10, 2021.

Destination Canada Resident Sentiment – Safety of Travel

- A large majority of Canadians report feeling safe travelling *to nearby communities and elsewhere in their own provinces*. Meanwhile, relatively few feel safe travelling *internationally*.
- About 60% of Canadians in most regions now feel safe travelling to *other provinces*, with only Atlantic Canadians falling just short of a majority.
- Atlantic Canadians' feelings of safety travelling within their province remain among the highest in the country, while for *international travel* are the lowest in the country, particularly for travel to the *United States*.

Destination Canada Resident Sentiment – Safety of Travel, NS vs Rest of Atlantic

ATLANTIC CANADIANS (EXCLUDING NS) VS NOVA SCOTIANS



- For both Nova Scotians and Atlantic Canadians, the gap in safety sentiment between travel within one's home province and travel to other provinces has been shrinking throughout the summer.

Destination Canada Resident Sentiment – Welcoming Visitors

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

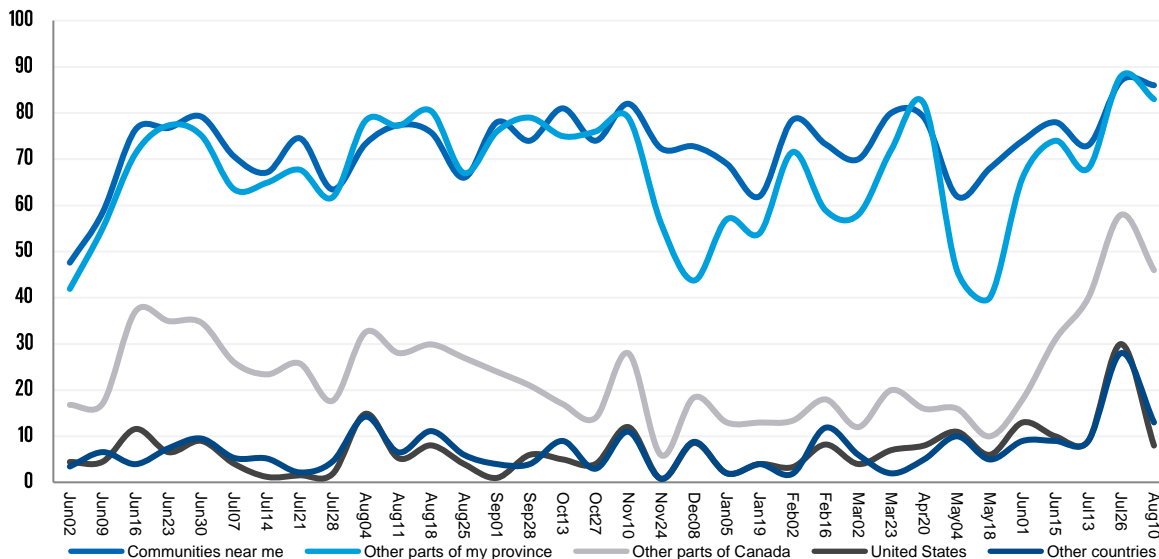
	REGION OF RESIDENCE					
	BC	AB	SK / MB	ON	QC	ATL
Other communities near me	73	68	72	68	72	81
Other parts of my province	58	69	70	65	74	80
Other parts of Canada	45	57	55	53	58	43
The United States	17	31	30	22	28	11
Other countries	14	27	27	21	28	12
SAMPLE SIZE	207	205	200	612	411	201

ATLANTIC CANADA	
Rural	Urban
80	81
77	81
43	44
11	11
11	13
124	77

- % Somewhat / Strongly Agree
- Note: red/green text indicates a significant difference between regions.
- Results from week of August 10, 2021.

Destination Canada Resident Sentiment – 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, and increasingly this extends to other Canadians, while few would welcome international visitors.

Destination Canada Resident Sentiment – Welcoming Visitors

- Canadians remain generally negative about welcoming *international* visitors, with Atlantic Canadians being among the most negative in this regard.
- A majority of Canadians from most regions are willing to welcome visitors from *other parts of the country*, with only residents of British Columbia and Atlantic Canada falling just short of a majority.

Destination Canada Resident Sentiment – Promoting Home Community to Visitors

- ‘How would you feel if you saw an advertisement today promoting your community to each of the following regions as a place for visitors to come when it is safe?’

	REGION OF RESIDENCE						ATLANTIC CANADA	
	BC	AB	SK / MB	ON	QC	ATL	Rural	Urban
Other communities near me	+33	+47	+40	+30	+45	+60	+67	+56
Other parts of my province	+25	+43	+43	+25	+40	+61	+64	+60
Other parts of Canada	+4	+24	+22	+14	+22	+17	+13	+21
The United States	-38	-13	-6	-28	-16	-39	-49	-33
Other countries	-38	-15	-21	-31	-15	-45	-52	-41
SAMPLE SIZE	210	200	200	613	411	200	136	64

- Net level of happiness is the total of Very happy/Happy, less the total of Very unhappy/Unhappy
- Note: **Green** text indicates a net positive response, **red** text a net negative response, **black** text a neutral response.
- Results from week of August 3, 2021.

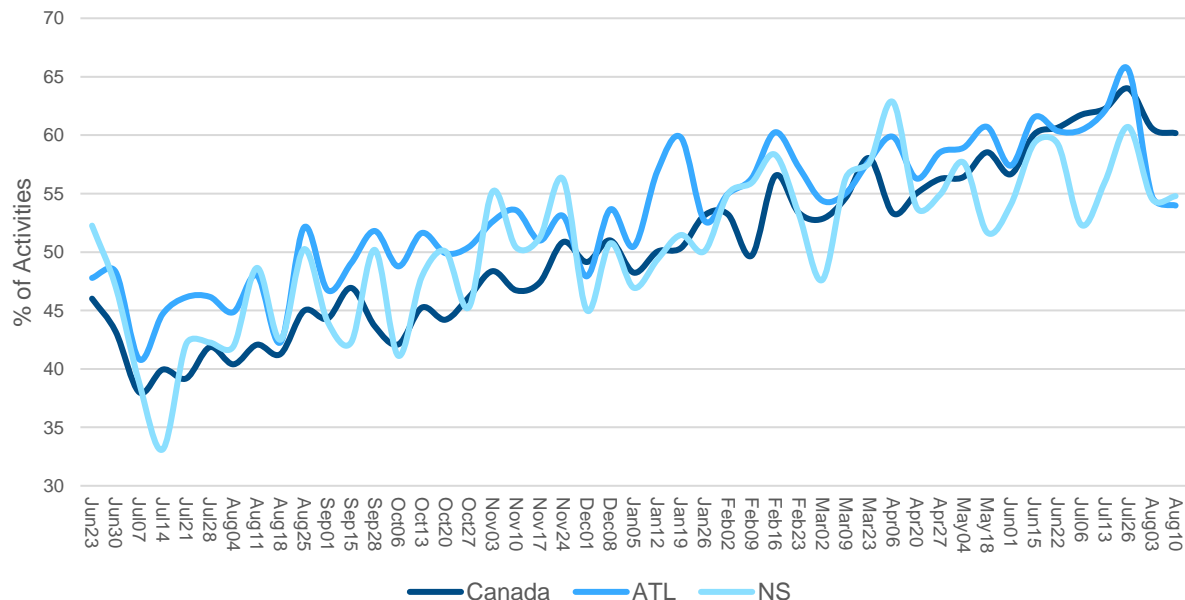
Destination Canada Resident Sentiment – Promoting Home Community to Visitors

- Canadians are positive about their communities being promoted as places to visit to people from *nearby communities* and *other parts of their own province*. Atlantic Canadians are the most positive in this regard.
- All regions now favour having their communities advertised to visitors from *other parts of the country*.
- Canadians in all regions remain negative about their communities being promoted as travel destinations to international visitors, with residents of British Columbia and Atlantic Canada being the most negative about the idea.

Destination Canada – 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...*
- The overall percentage of activities that Canadians are comfortable with has been gradually increasing over the course of 2021.
- Among those activities Canadians are least comfortable with, a large minority – more than four in 10 – now express comfort with *flying on an airplane, attending large public gatherings, and going to bars and pubs*, with *travelling to the United States* trailing slightly behind at 36%.
- Atlantic Canadians do not share other Canadians' increasing willingness to *fly on an airplane, attend large gatherings, or travel to the US*.

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	83	89	87
Shopping at the mall	79	77	79
Going back to your workplace/office	77	79	70
Dining in restaurants	77	82	75
Activities least comfortable with:			
Flying on an airplane	45	29	29
Large gatherings such as sporting events, concerts, festivals	43	27	34
Going to bars, lounges, night clubs, pubs	42	35	44
Travelling to the United States	36	16	17
SAMPLE SIZE			
	1836	201	100

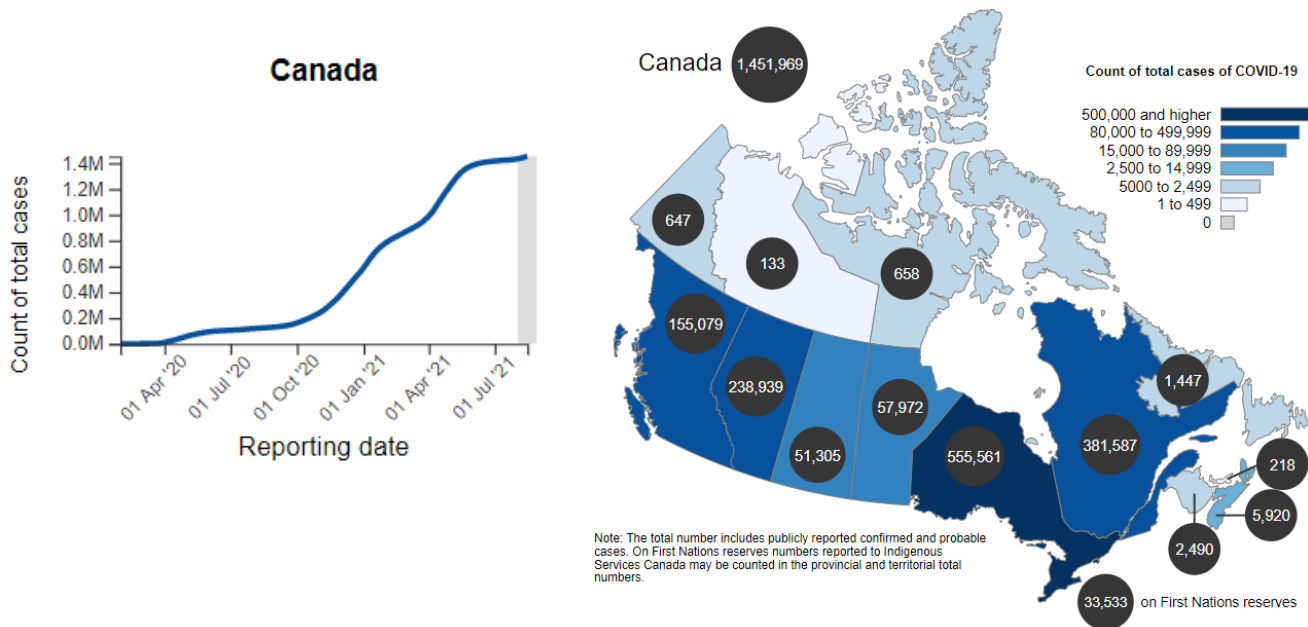
- % Comfortable with each activity, among applicable
- Results from week of August 10, 2021.

Government of Canada COVID-19 Status

As of August 15, 2021

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

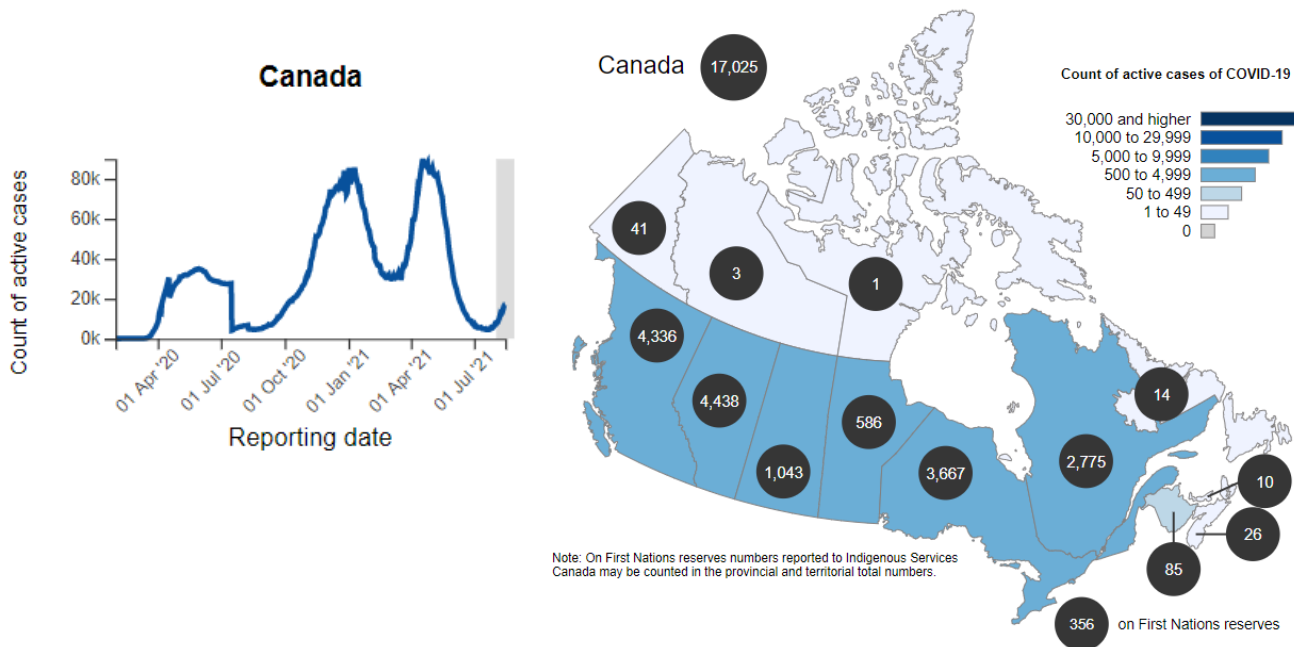
The count of total cases of COVID-19 in **Canada** was **1,451,969** as of August 15, 2021



Government of Canada – COVID-19

Count of *Active* Cases

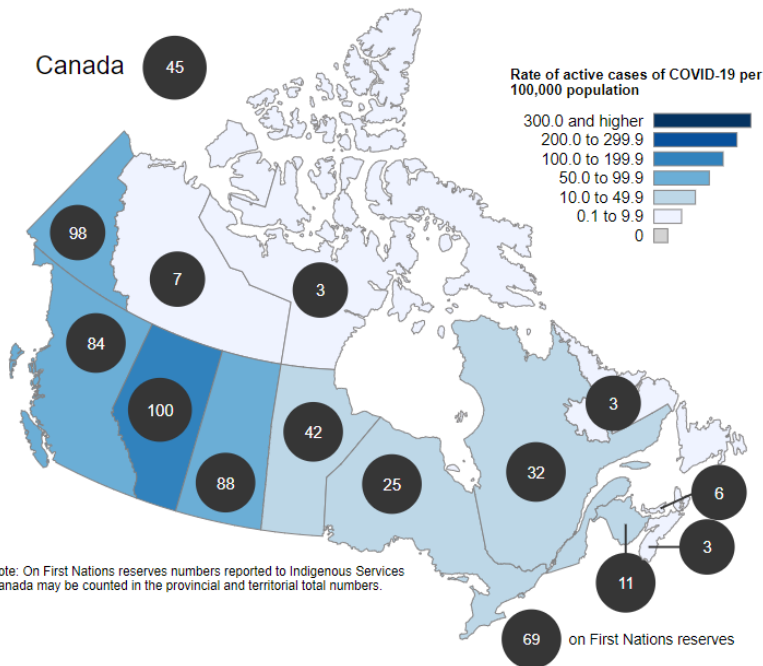
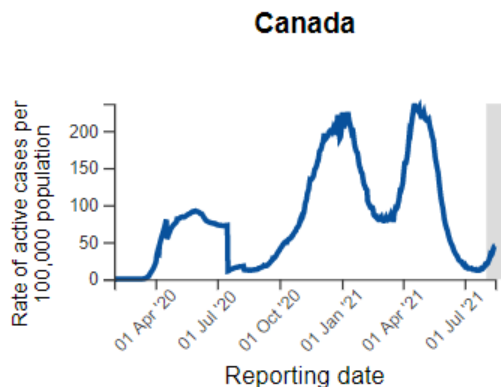
The count of active cases of COVID-19 in **Canada** was **17,025** as of August 15, 2021



Government of Canada – COVID-19

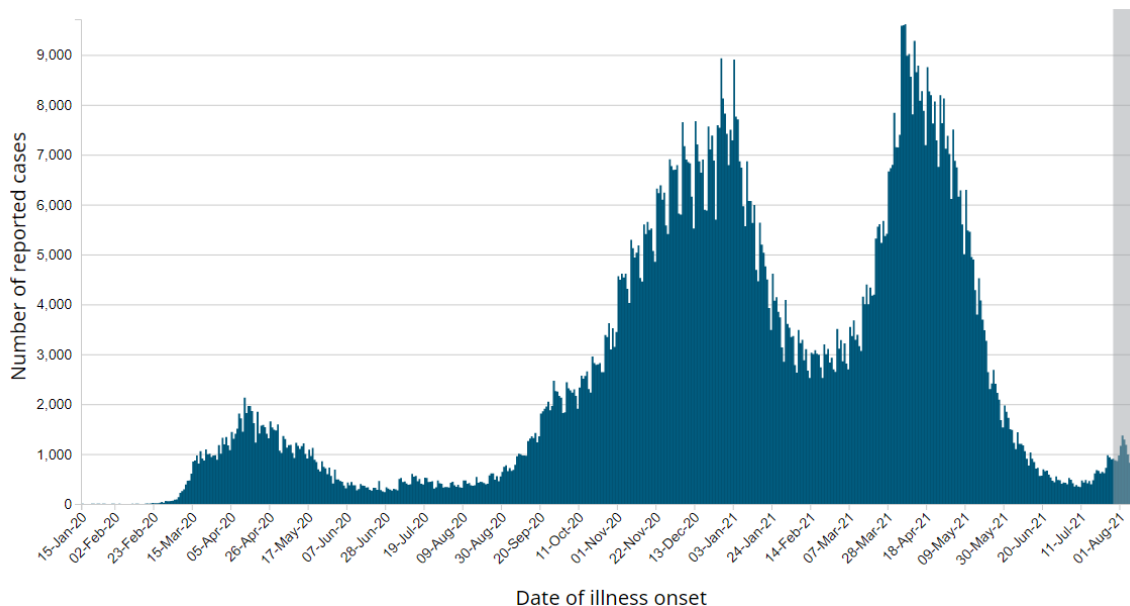
Rate of Active Cases

The rate of active cases of COVID-19 in **Canada** was **45 per 100,000 population** as of August 15, 2021



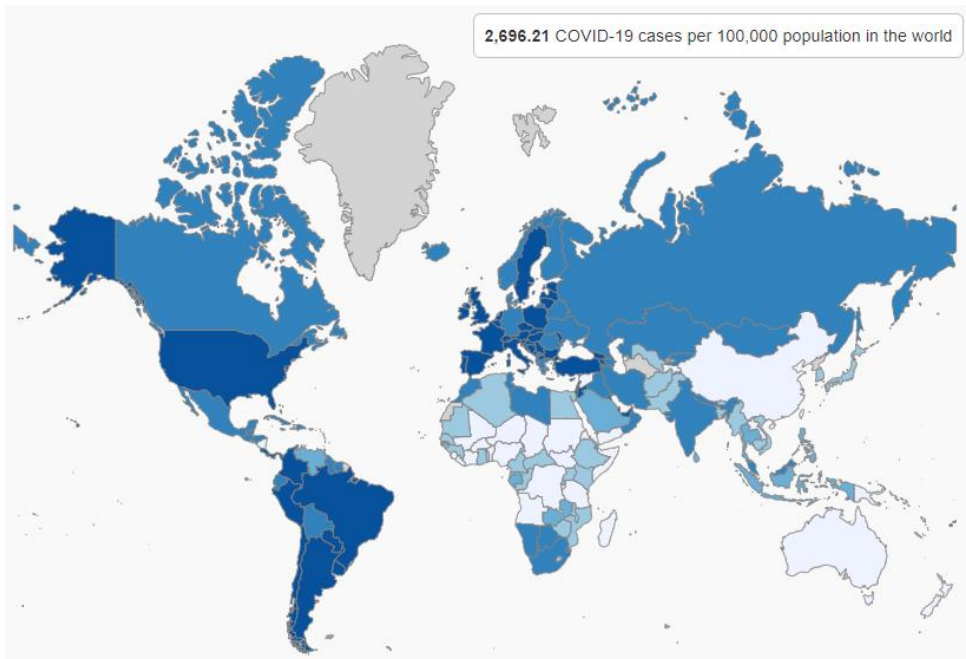
Government of Canada – COVID-19 Cases by *Date* (Epidemic Curve)

Total COVID-19 cases in Canada (n=1,423,778) by date of illness onset, as of August 13, 2021.

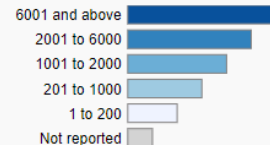


Government of Canada – COVID-19

World Cases Per 100,000 People

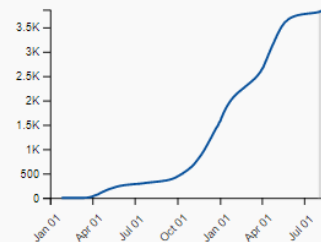


Number of cases per 100,000 population of COVID-19



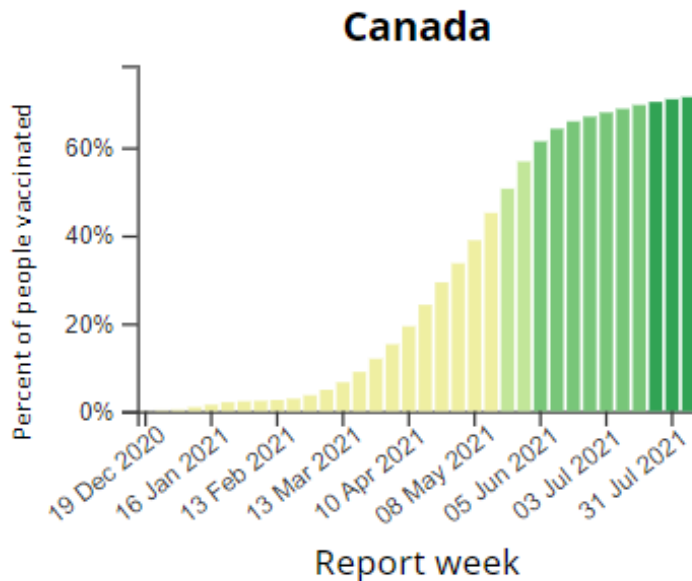
Canada

3,863.92 COVID-19 cases per 100,000 population as of August 14th, 2021.



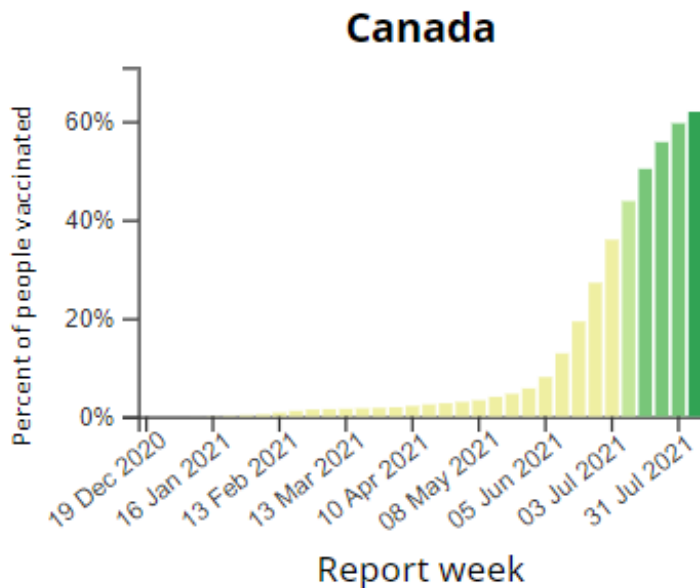
Government of Canada – Percentage With At Least 1 Vaccine Dose

The cumulative percent of the population who have received **at least one dose** of a COVID-19 vaccine in Canada was **71.4%** as of August 7, 2021.



Government of Canada – Percentage Fully Vaccinated

The cumulative percent of the population **fully vaccinated** with a COVID-19 vaccine in Canada was **61.9%** as of August 7, 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 dash board at:
<https://novascotia.ca/coronavirus/data/#dashboard>

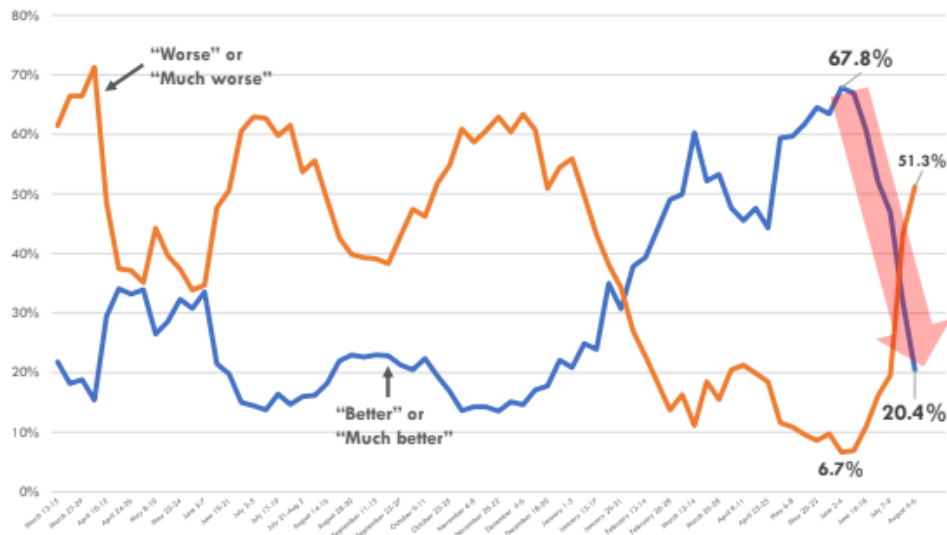
Destination Analysts American Travel Sentiment Tracker

Updated to August 10, 2021

Destination Analysts: Most US Travellers Expect Pandemic to Get Worse

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

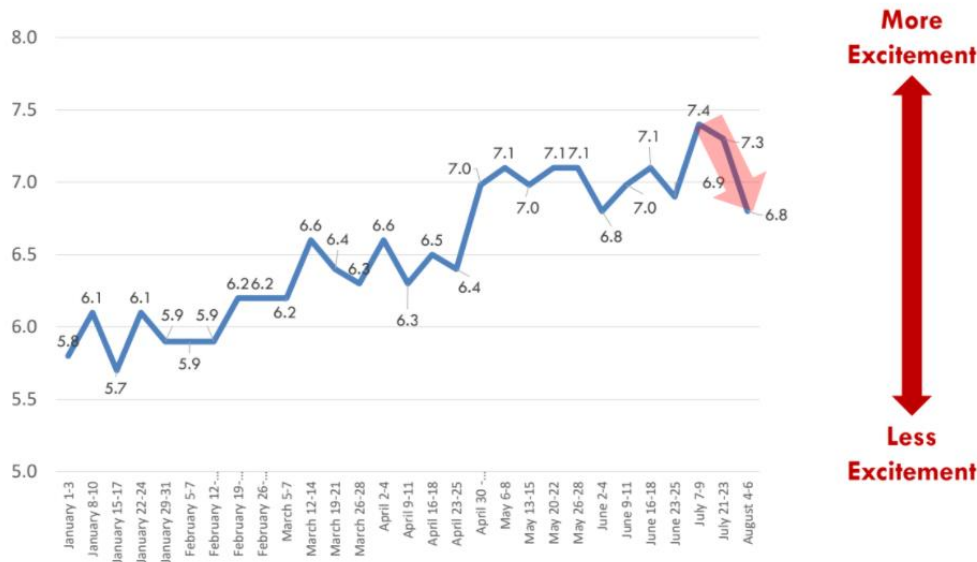
In the next month the coronavirus situation will get



- For the first time since January, a majority of American travellers (51%) think the pandemic will get worse over the next month. This compares to only 20% who think it will get better.

Destination Analysts: Interest in Leisure Travel Falls to Lowest Point Since June

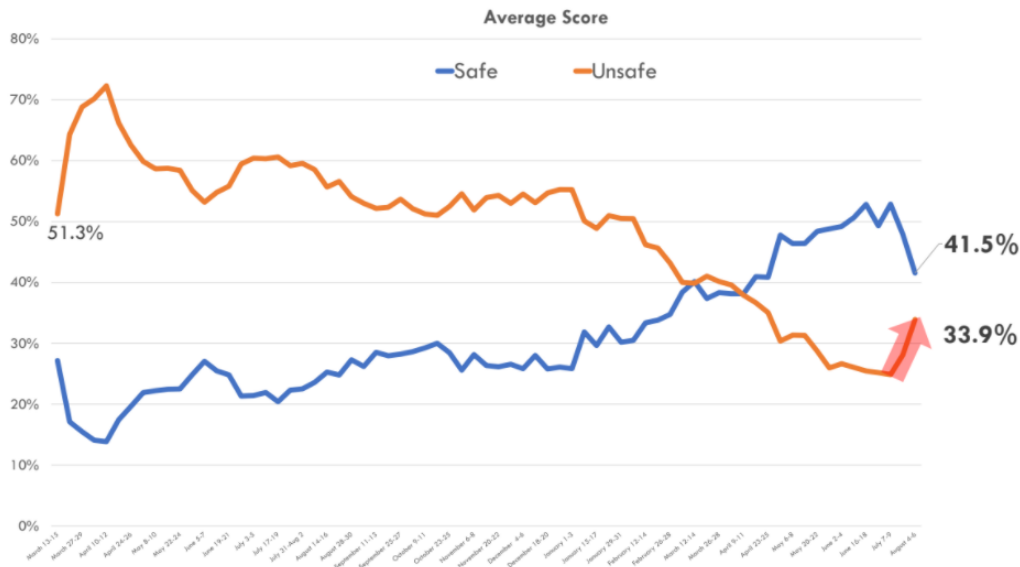
Question: Which best describes how excited you are about LEISURE TRAVEL in this year (2021)? (Please answer using the 11-point scale below)



- Excitement for leisure travel among American travellers has dropped for the second straight week and has reached its lowest point since early June.

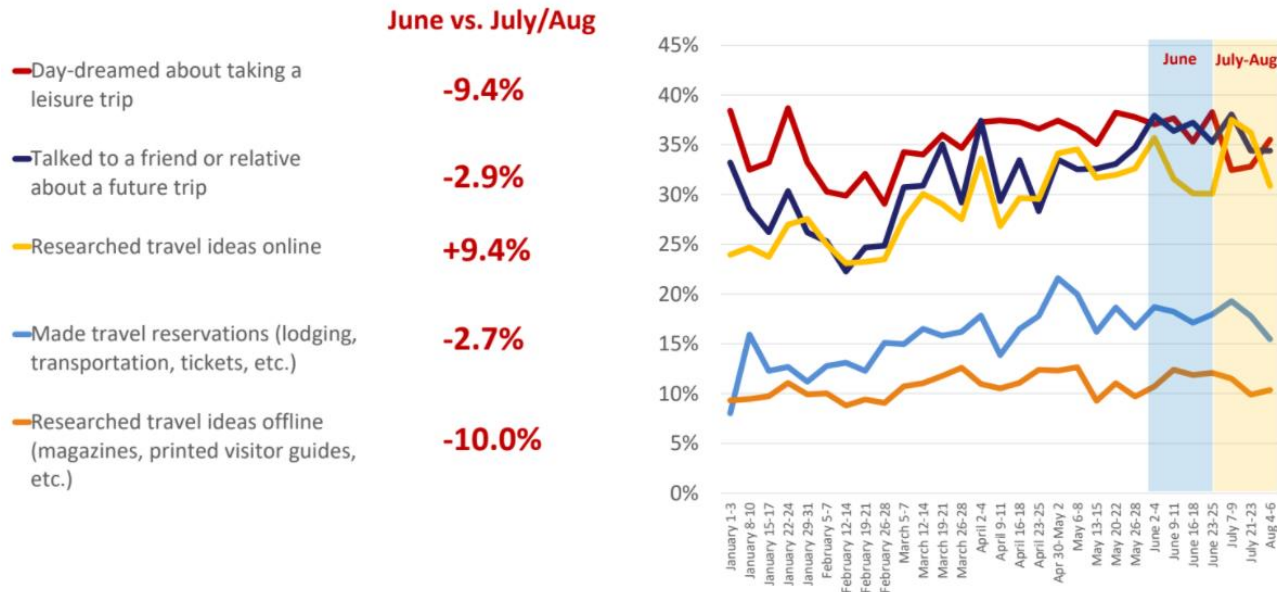
Destination Analysts: US Travellers Feeling Less Safe About Travel Activities

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



- One-third of American travellers – the most since April – say they don't feel safe participating in a range of travel activities, such as visiting friends or relatives and staying in a hotel.

Destination Analysts: Travel Planning Drops in July/August

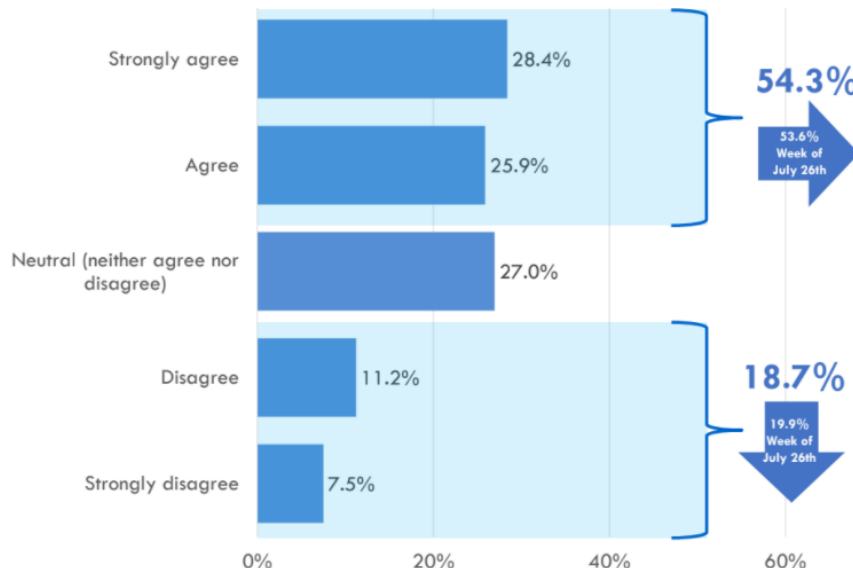


- Although US travellers are doing more online travel research now than they did in June, all other travel planning activities, including making bookings, have been scaled back.

Destination Analysts: Delta Variant Dampening Interest in Travel

Question: Recent news about increasing “Delta Variant” cases make me less interested in traveling right now.

(Base: Wave 71 data. All respondents, 1,205 completed surveys. Data collected August 4-6, 2021)

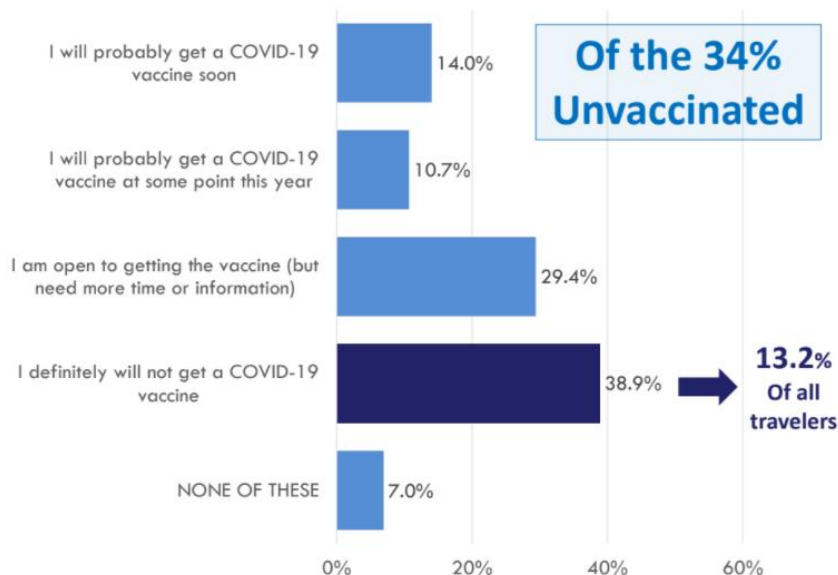


- More than half of American travellers say the COVID-19 Delta variant is making them less interested in travelling – sentiment that has held steady since July.

Destination Analysts: Anti-Vaccine Sentiment Remains Among US Travellers

Question: Which best describes your current mindset? (Select one)

(Base: Wave 71 data. Respondents who have not received a COVID-19 vaccine, 335 completed surveys. Data collected August 4-6, 2021)

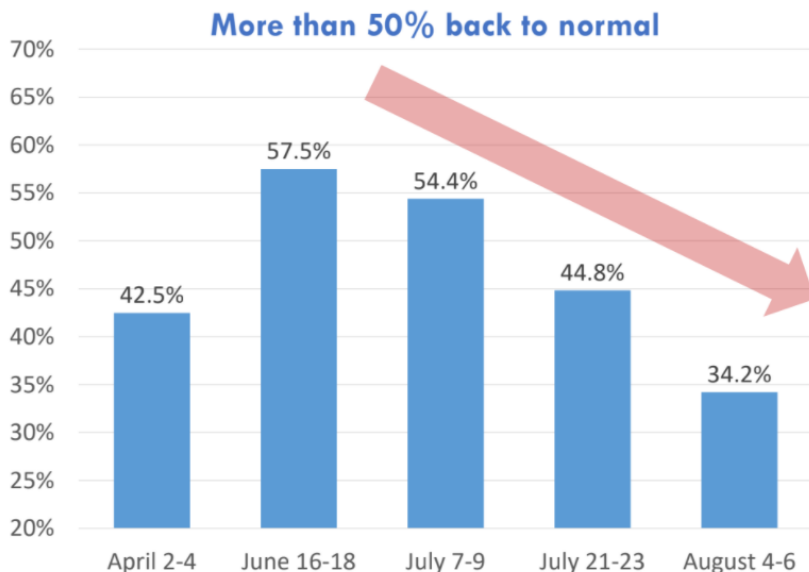


- One-third of all respondents in Destination Analysts' travel sentiment survey are unvaccinated. While some of these remain open to getting a COVID-19 vaccine, a large minority of 39% – representing 13% of total respondents – say they 'definitely' do not intend to get vaccinated.

Destination Analysts: 'Return to Normal' Sentiment Continues to Decline

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

(Base: Wave 70 data. All respondents, 1,208 completed surveys. Data collected July 21-23, 2021)



- The percentage of US travellers who believe their country is returning to 'normal' in terms of being able to resume travel and leisure activities has declined consistently since mid-June.

