

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

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* 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/2020/04/2020-04-29-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) 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

- **Halifax was the 8th most popular destination city** among Canadians searching online for city flights and accommodations from late June to late July, according to Google's new Destination Insights report.
- Overall tourism activity in Nova Scotia in May 2021 was **78% below the level in May 2019**, before the impact of the pandemic. Nova Scotia's tourism decline in May was worse than the Canadian average (69% below May 2019 levels) and was the **largest relative decline among all provinces**, as measured by Statistics Canada's Tourism Activity Index.
- Trips to Canada by travellers from other countries were down in May from the previous month, while international travel by Canadians was up, according to Statistics Canada. Overall, **travel between Canada and other countries remained significantly lower** than at the same time in 2019.
- **Overnight visitation to Nova Scotia** in mid July was **up 16%** over the previous week (WoW), and **up 21%** compared with the same week the previous year (YoY), according to Environics' Weekly Tracker of mobile data movements.

- **Nova Scotia** remains one of only three Canadian provinces, along with PEI and Newfoundland and Labrador, in the **Intra-provincial phase of recovery**, according to the latest Destination Canada Travel Recovery Assessment. All other provinces and territories are now in the more advanced **Inter-provincial phase**.
- More than half of Canadians in all regions now feel **safe travelling to other provinces in the country**, including two-thirds of Ontarians who feel safe doing so, according to Destination Canada's latest Resident Sentiment survey.
- The federal government reports that the **number of active COVID-19 cases in Canada is increasing**, with almost 6,000 cases as of July 29. Nationally, the **rate of active cases on** July 29 stood at 16 cases per 100,000 people, up from 12 per 100,000 in mid-July. In Nova Scotia, the rate was 1 per 100,000 on July 29.
- Destination Analysts is warning of **plummeting optimism among US travellers** about the future of the pandemic, along with **stagnating or declining metrics** on a range of traveller sentiment measures, largely due to the spread of the Delta COVID-19 variant.

Google Destination Insights

As of July 20, 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. **June 20 – July 20, 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. **June 20 – July 20, 2021**. Demand is scored by search volume on an index of 0-100.

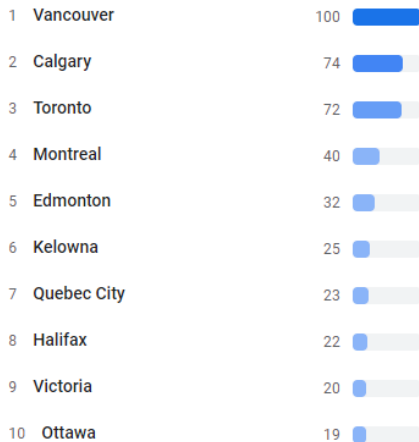


Google Destination Insights: 30-Day Domestic Demand by Destination City

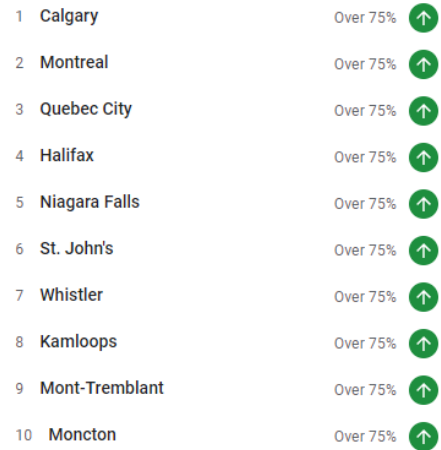
Cities are scored on an index of 0-100, based on domestic Google search demand by Canadians between **June 20 – July 20, 2021** for flights to, and accommodations in Canadian cities.

Growth is the *% change* in domestic Google travel search demand in the period **June 20 – July 20, 2021** compared to the previous 30-day period.

TOP DEMAND BY DESTINATION CITY



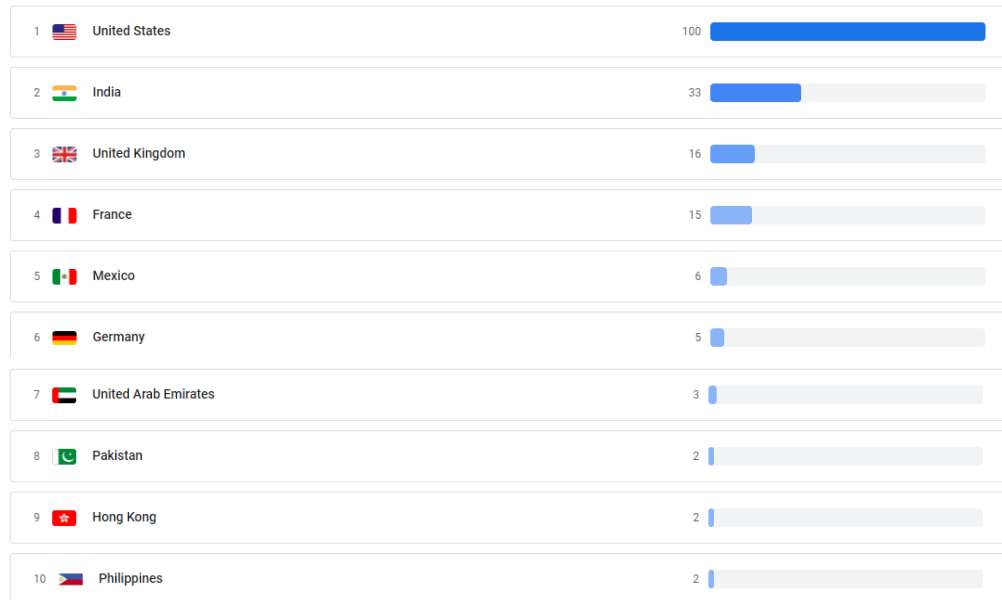
TOP GROWTH BY DESTINATION CITY



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

- Top sources of worldwide search demand for international travel to Canada. Search period: **June 20 – July 20, 2021**. Countries are scored by search volume, on an index of 0-100.

TOP DEMAND BY ORIGIN COUNTRY



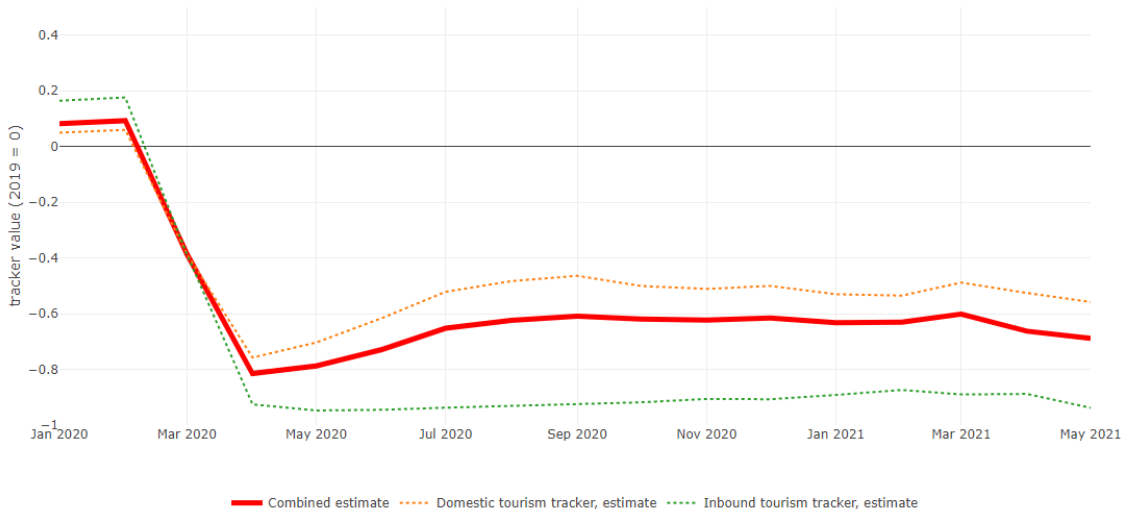
Statistics Canada: Canadian Tourism Activity Index

Updated to May 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

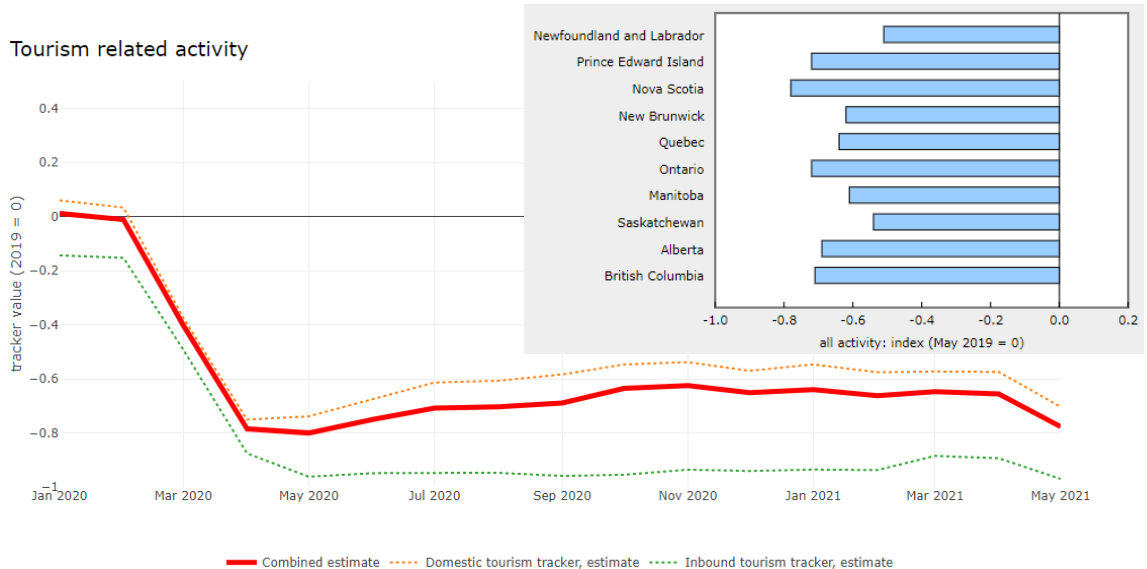
Tourism related activity



- In **May 2021**, combined tourism activity in **Canada** was **69% below** the level in May 2019, a larger decrease compared with April (-66%).

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

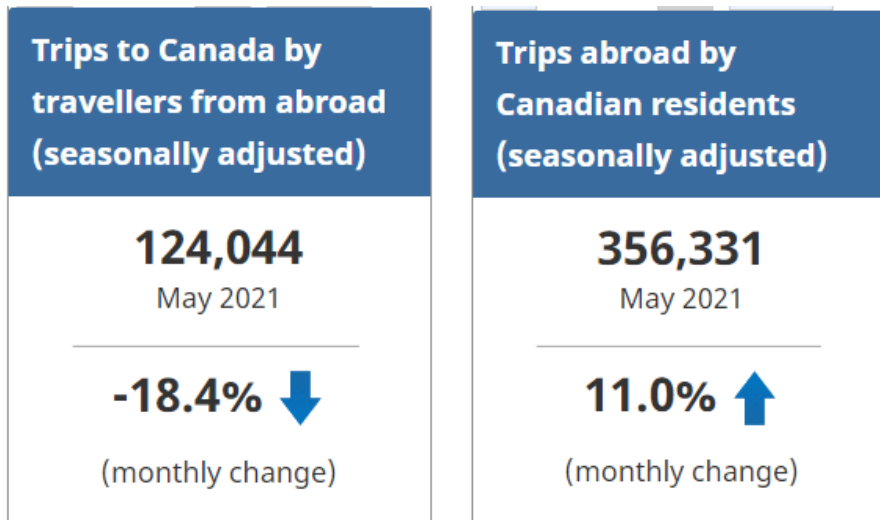


- In **May 2021**, combined tourism activity in **Nova Scotia** was **78% below** the level in May 2019. This was higher than the overall Canadian decline (69%) and the largest such decline among all provinces.

Statistics Canada: Travel Between Canada and Other Countries – May 2021

Released July 21, 2021

Statistics Canada: Travel Between Canada and Other Countries

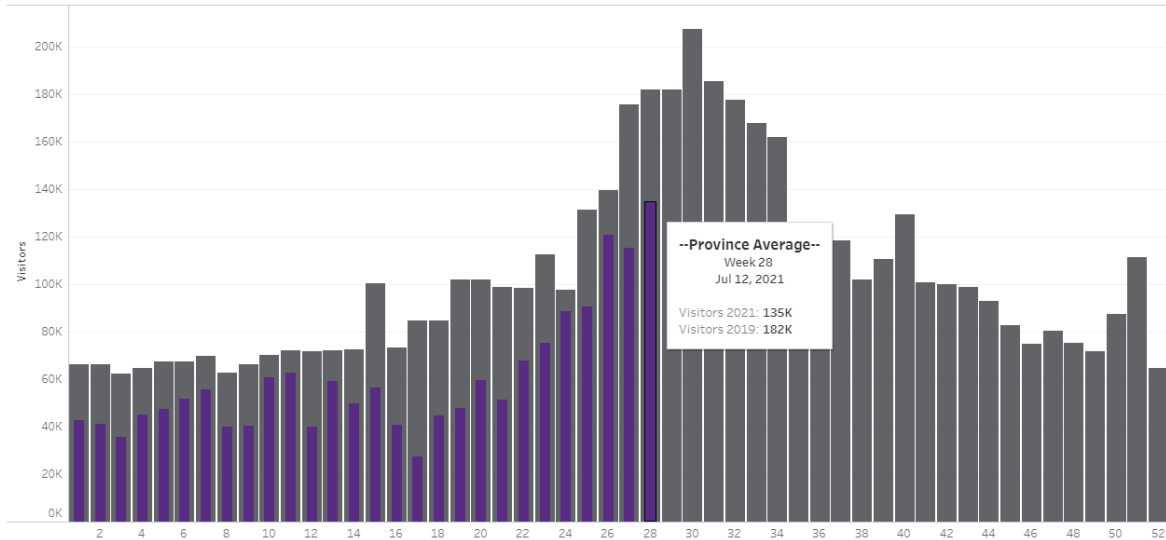


- Trips to Canada by travellers from other countries were **down more than 18%** in May from the previous month, and down 96% from pre-pandemic levels in May 2019.
- Trips to other countries by Canadians were **up 11%** in May from the previous month, but down 92% from pre-pandemic levels in May 2019.

Environics Analytics Weekly Visitation Tracker

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

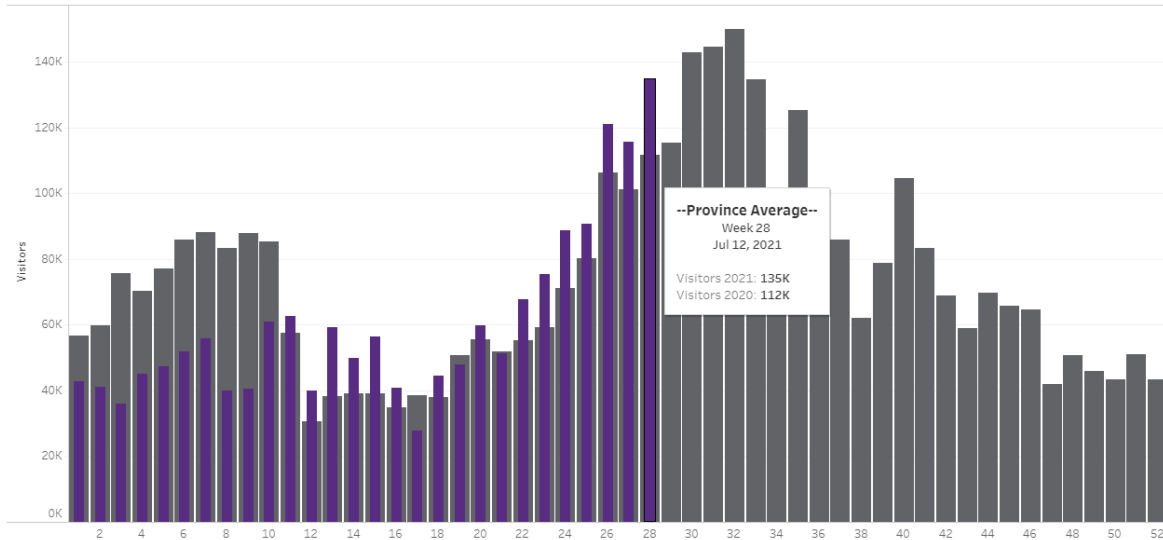
- Data reflects number of overnight visitors to Nova Scotia. The Weekly Tracker uses data based on mobile phone movements (60+ kilometers overnight travel), which may differ from other visitation estimates.



- About **135,000** overnight visitors came to Nova Scotia the week of **July 12, 2021**, **down** from about 182,000 the same week in **2019**.

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

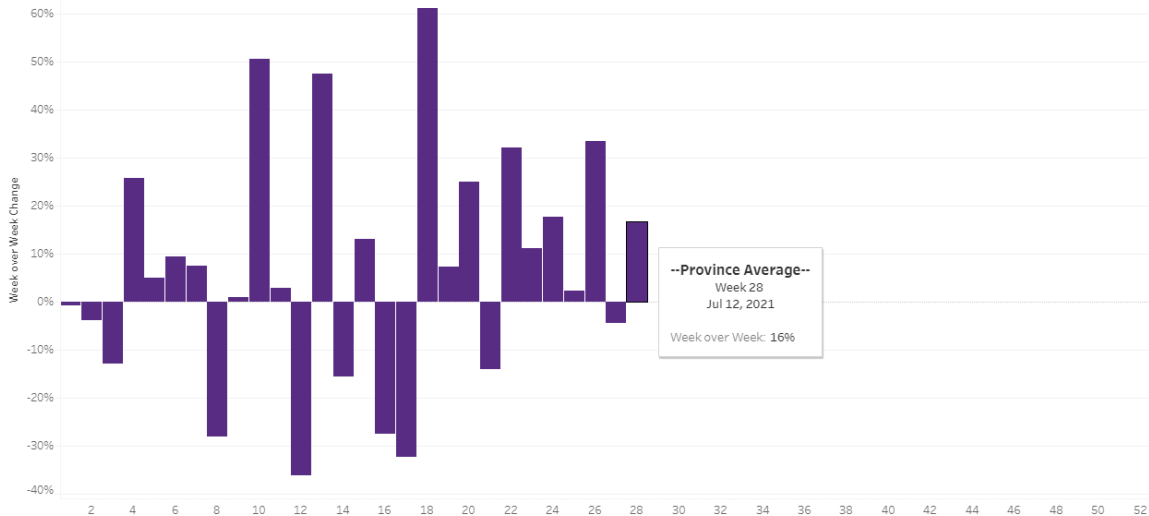
- Data reflects number of overnight visitors to Nova Scotia. The Weekly Tracker uses data based on mobile phone movements (60+ kilometers overnight travel), which may differ from other visitation estimates.



- About **135,000** overnight visitors came to Nova Scotia the week of **July 12, 2021**, **up** from about 112,000 the same week in **2020**.

Environics Weekly Tracker – Week Over Week Change, Nova Scotia

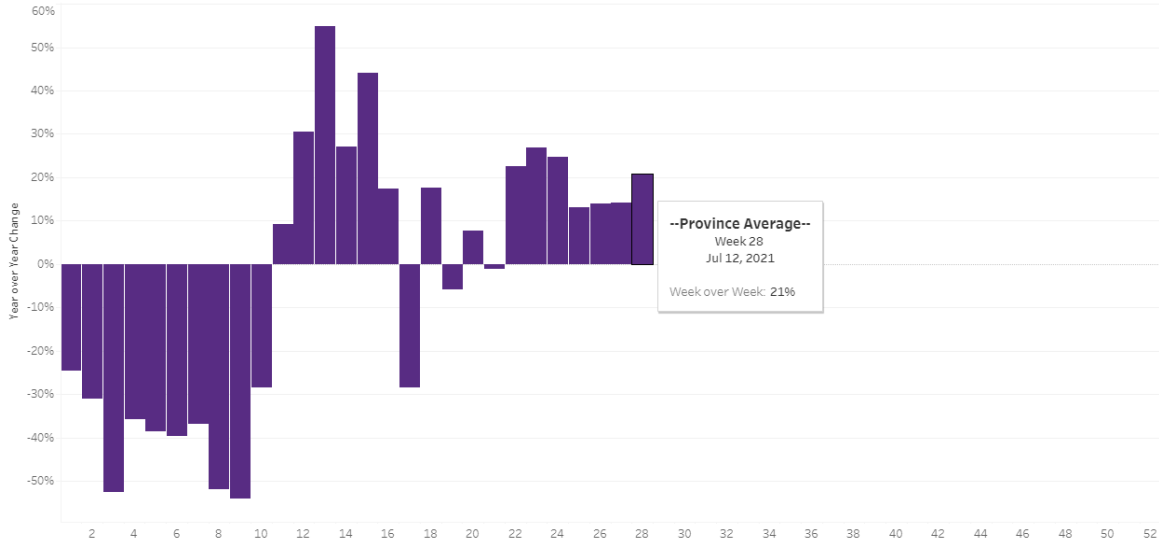
- Data reflects number of overnight visitors to Nova Scotia. The Weekly Tracker uses data based on mobile phone movements (60+ kilometers overnight travel), which may differ from other visitation



- The week of **July 12, 2021**, overnight visitation to **Nova Scotia** was **up 16%** over the previous week (WoW). In comparison, **national** weekly overnight visitation was up 3% 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



- The week of **July 12, 2021**, overnight visitation to **Nova Scotia** was **up 21%** over the same week the previous year (YoY). In comparison, **national** weekly overnight visitation was up 12% YoY.

Destination Canada: Travel Recovery Assessment

Destination Canada Provincial Travel Recovery Assessment

Timeline of overall assessment for each province and territory:

	30-Mar	6-Apr	13-Apr	20-Apr	27-Apr	2-May	9-May	16-May	23-May	30-May	6-Jun	13-Jun	20-Jun	27-Jun	4-Jul
British Columbia	III	III	III	II	II	II	II	II	II	II	II	III	III	IV	IV
Alberta	IV	IV	IV	IV	II	II	II	II	II	II	II	II	IV	IV	IV
Saskatchewan	II	II	II	II	II	II	II	II	II	II	II	II	II	IV	IV
Manitoba	II	II	II	II	II	II	II	II	II	II	II	II	II	II	IV
Ontario	II	II	II	II	II	II	II	II	II	II	II	II	III	IV	IV
Quebec	IV	IV	IV	IV	II	II	II	II	II	III	III	III	III	IV	IV
New Brunswick	III	III	III	III	III	III	III	III	III	III	III	III	III	III	IV
Nova Scotia	III	III	III	III	III	III	III	II	II	II	II	II	III	III	III
Prince Edward Island	III	III	III	III	III	III	III	III	III	III	III	III	III	III	III
Newfoundland & Labrador	II	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	IV	IV	IV	IV	IV
Northwest Territories	III	III	III	III	III	III	III	III	III	III	III	III	III	III	IV
Nunavut	III	III	III	III	III	III	II	II	II	III	III	III	IV	IV	IV

Legend:

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

I COVID-19 Response	II Hyper Local	III Intra-prov	IV Inter-prov	V Tentative Int'l	VI Regularized Int'l
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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 4**:

- All but three provinces and territories are now in the **Inter-provincial (IV)** phase of recovery.
- Nova Scotia, Prince Edward Island and Newfoundland and Labrador remain in the **Intra-provincial (III)** phase.

Destination Canada: Resident Sentiment Survey

Updated July 26, 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	92	88	88	85	84	95	98	93
Communities in my province	86	87	83	78	86	93	91	96
Other provinces in Canada	63	79	76	65	67	63	56	67
The United States	24	42	35	27	36	16	16	16
Other countries	24	36	29	23	31	22	17	25
SAMPLE SIZE	203	204	200	605	407	200	127	71

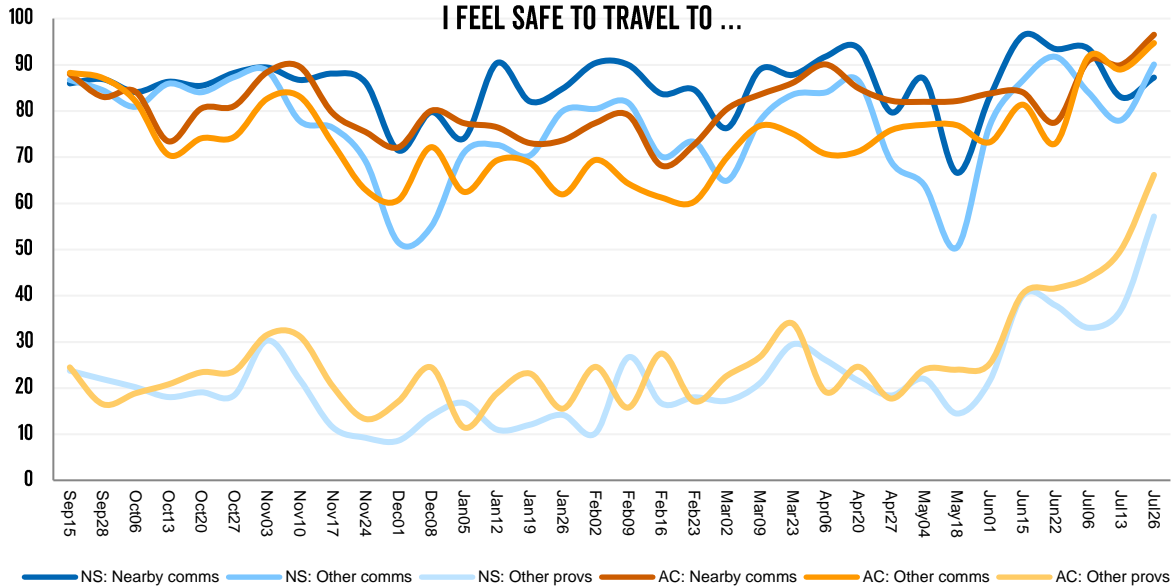
- % Somewhat / Strongly Agree
- Note: red/green text indicates a significant difference between regions.
- Results from week of July 26 2021.

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*.
- Well over half of Canadians in *all* regions now feel safe travelling to *other provinces*, including two-thirds of Ontarians who feel safe doing so. This is the first measurement period where a majority of Atlantic Canadians report feeling safe travelling *elsewhere in the country*.
- 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 steadily throughout the summer.

Destination Canada Resident Sentiment – Welcoming Visitors

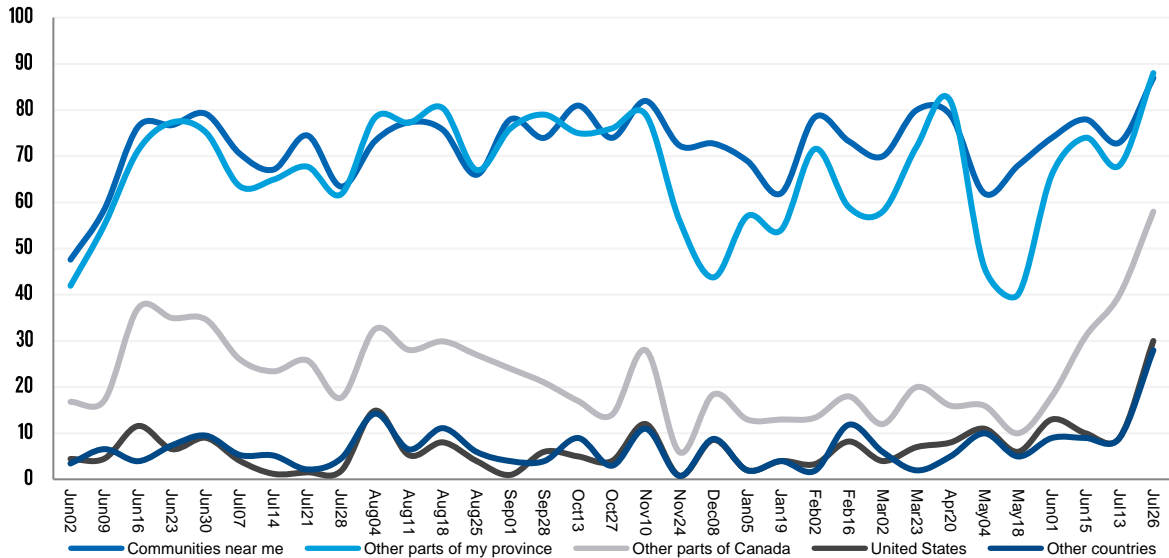
- ‘I would welcome visitors travelling to my community from ...’

	REGION OF RESIDENCE						ATLANTIC CANADA	
	BC	AB	SK / MB	ON	QC	ATL	Rural	Urban
Other communities near me	83	81	83	70	73	90	89	93
Other parts of my province	80	81	80	65	75	88	87	91
Other parts of Canada	62	74	67	57	65	66	64	69
The United States	25	38	33	25	36	24	22	25
Other countries	22	32	32	19	29	24	24	23
SAMPLE SIZE	203	204	200	605	407	200	127	71

- % Somewhat / Strongly Agree
- Note: red/green text indicates a significant difference between regions.
- Results from week of July 26 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.

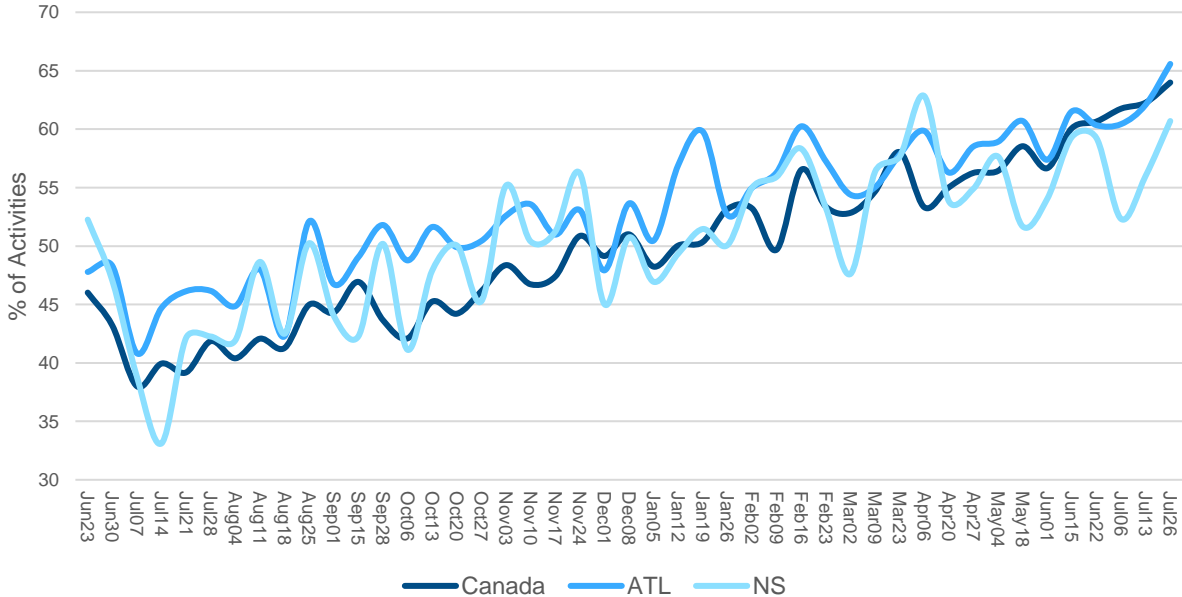
Destination Canada Resident Sentiment – Welcoming Visitors

- Canadians remain generally negative about welcoming *international* visitors, with Atlantic Canadians being among the most negative in this regard.
- A majority of Canadians from all regions are now willing to welcome visitors from *other parts of the country*.

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 4 in 10 – now express comfort with *flying on an airplane, attending large public gatherings, going to bars and pubs, and travelling to the United States.*
- Atlantic Canadians do not share other Canadians' increasing willingness to *travel to the US*, with only 23% of Atlantic residents, and 22% of Nova Scotia residents, expressing comfort with such travel.

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	87	91	91
Shopping at the mall	85	86	82
Going back to your workplace/office	81	90	82
Dining in restaurants	81	87	80
Activities least comfortable with:			
Flying on an airplane	47	46	41
Large gatherings such as sporting events, concerts, or festivals	44	51	48
Going to bars, lounges, night clubs, pubs	44	52	53
Travelling to the United States	42	23	22
SAMPLE SIZE	1819	200	81

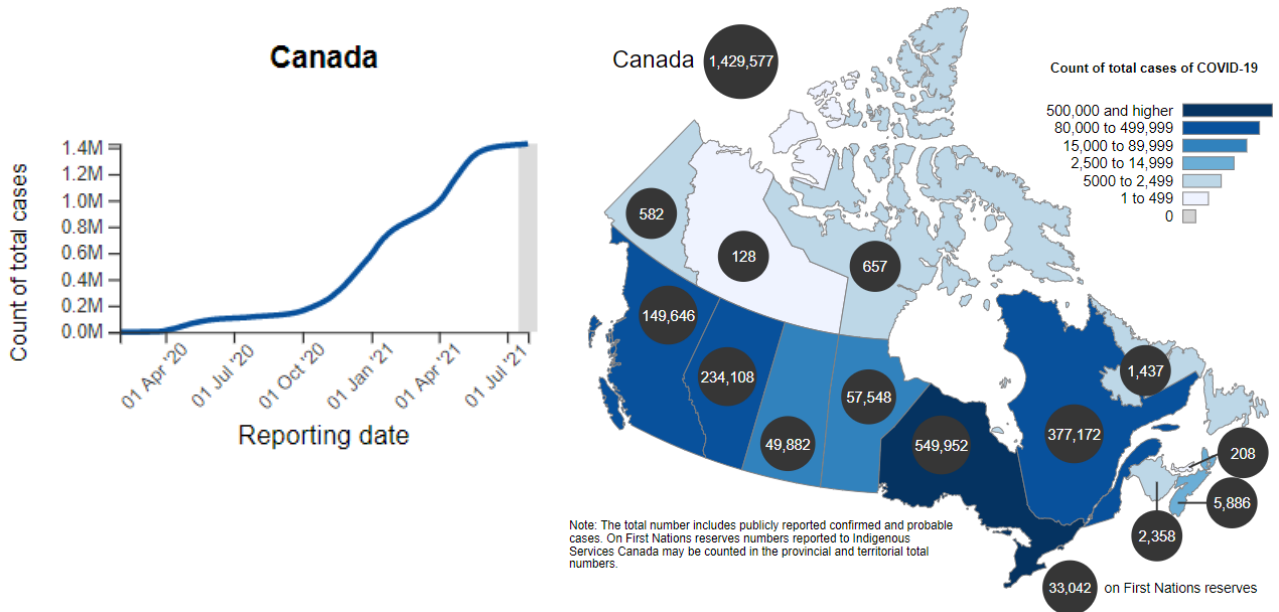
- % Comfortable with each activity, among applicable
- Results from week of July 26 2021.

Government of Canada COVID-19 Status

As of July 29, 2021

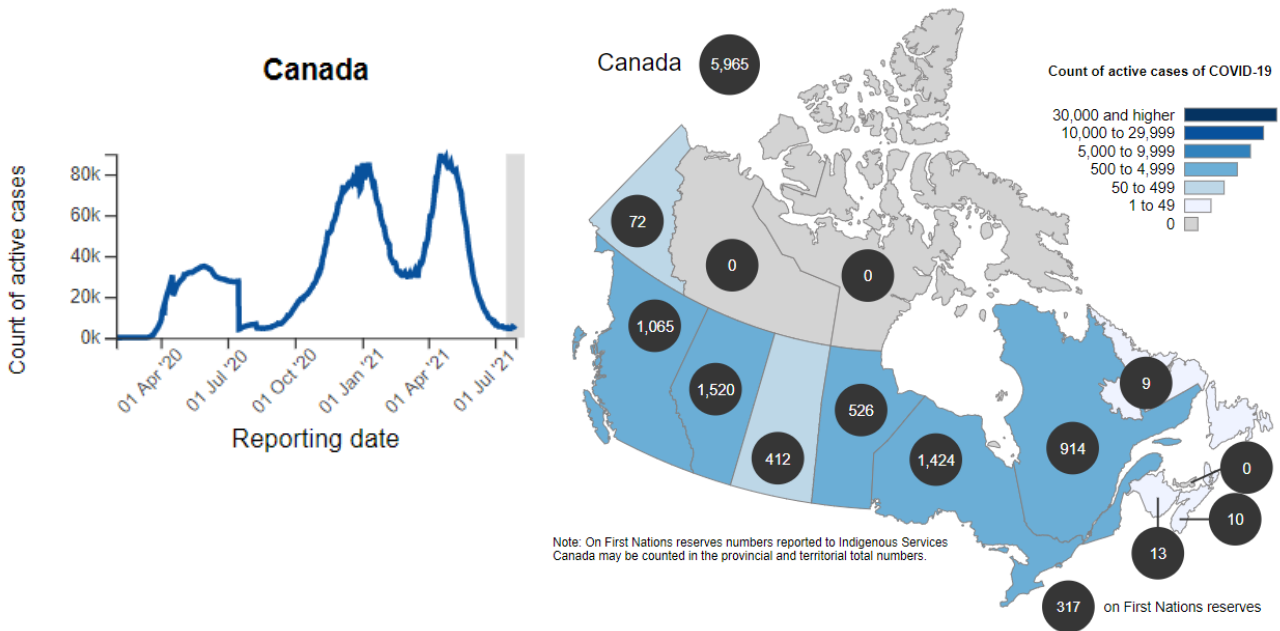
Government of Canada – COVID-19 Count of *Total* Cases

- The count of total cases of COVID-19 in **Canada** was **1,429,577** as of July 29, 2021.



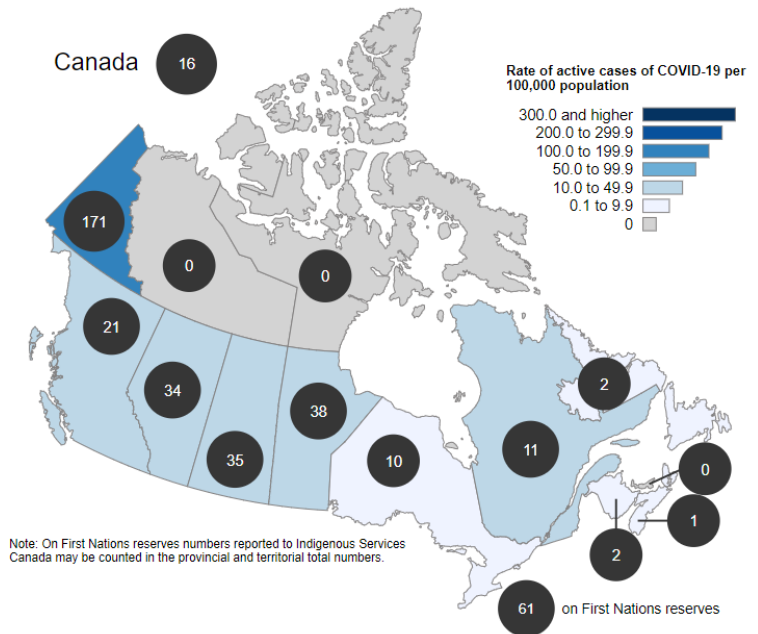
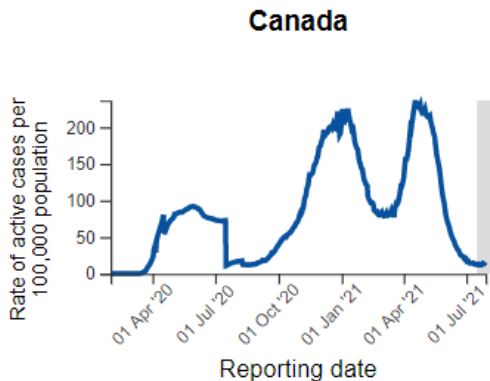
Government of Canada – COVID-19 Count of *Active* Cases

- The count of active cases of COVID-19 in **Canada** was **5,965** as of July 29, 2021.



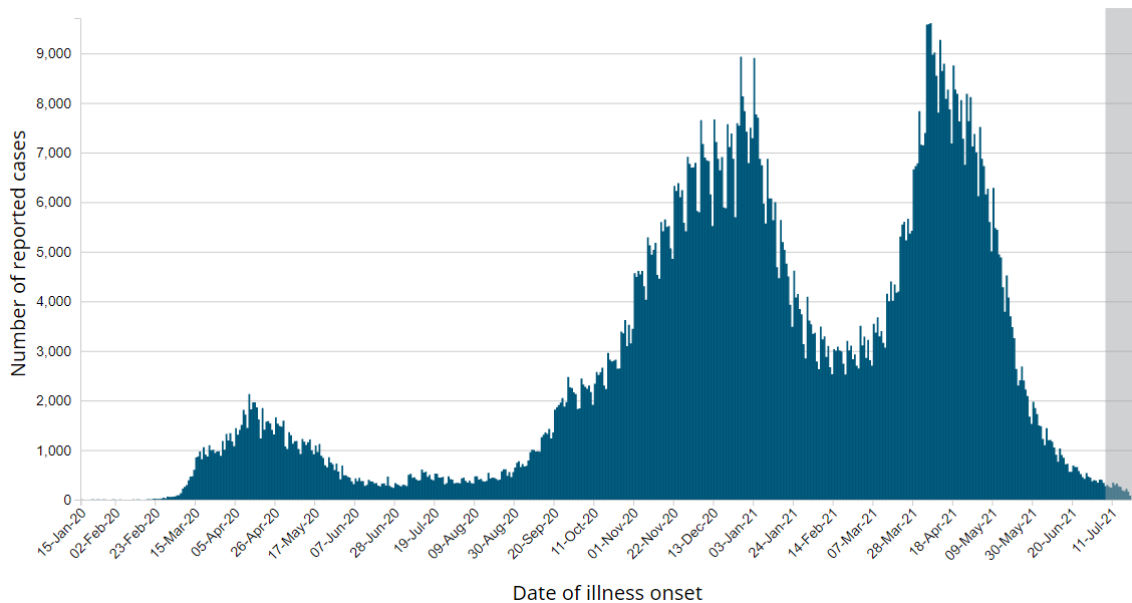
Government of Canada – COVID-19 Rate of Active Cases

- The rate of active cases of COVID-19 in **Canada** was **16 per 100,000 population** as of July 29, 2021.

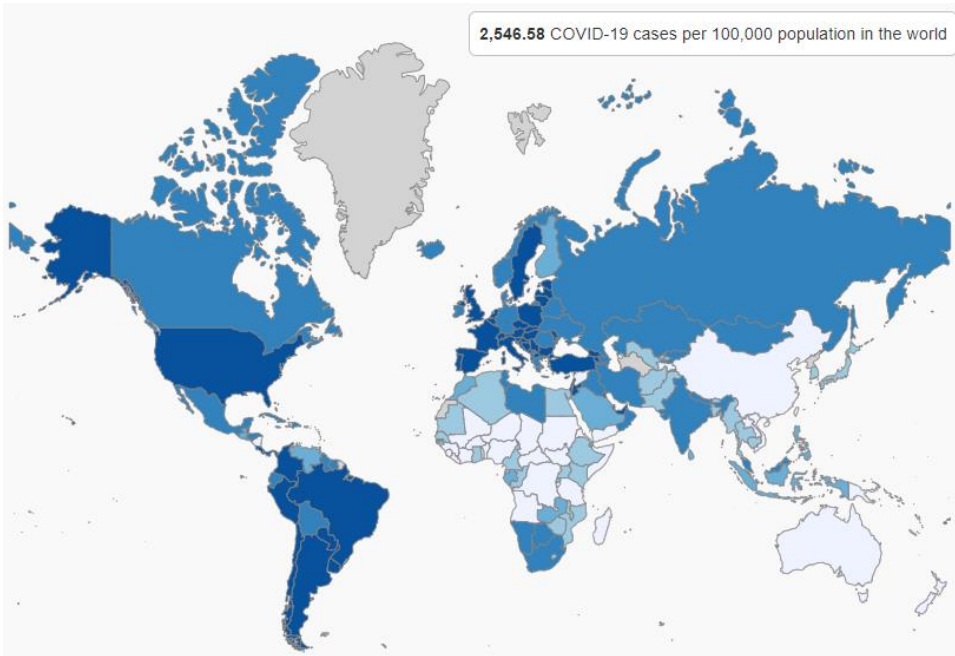


Government of Canada – COVID-19 Cases by *Date*

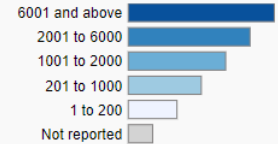
- Total COVID-19 cases in Canada (n=1,423,778) by date of illness onset, as of July 23, 2021.



Government of Canada – COVID-19 World Cases Per 100,000 People

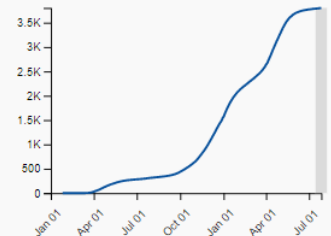


Number of cases per 100,000 population of COVID-19



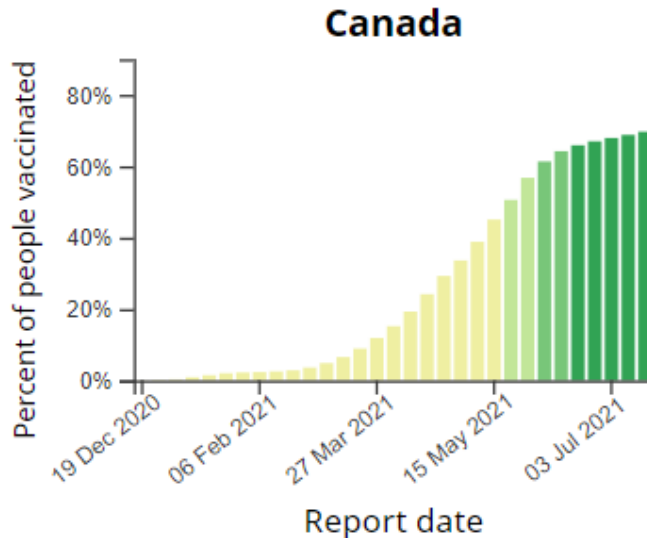
Canada

3,803.18 COVID-19 cases per 100,000 population as of July 27th, 2021.



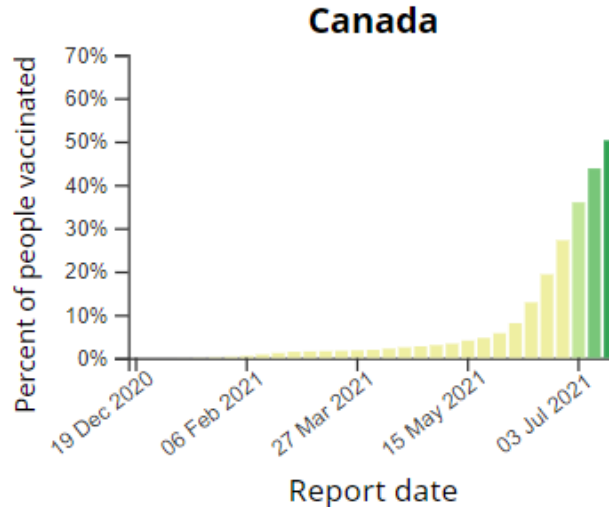
Government of Canada – Percentage With At Least 1 Vaccine Dose

- The cumulative percent of the population who have received **at least one dose** of a COVID-19 vaccine in Canada was **69.7%** as of July 17, 2021.



Government of Canada – Percentage Fully Vaccinated

- The cumulative percent of the population **fully vaccinated** with a COVID-19 vaccine in Canada was **50.2%** as of July 10, 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

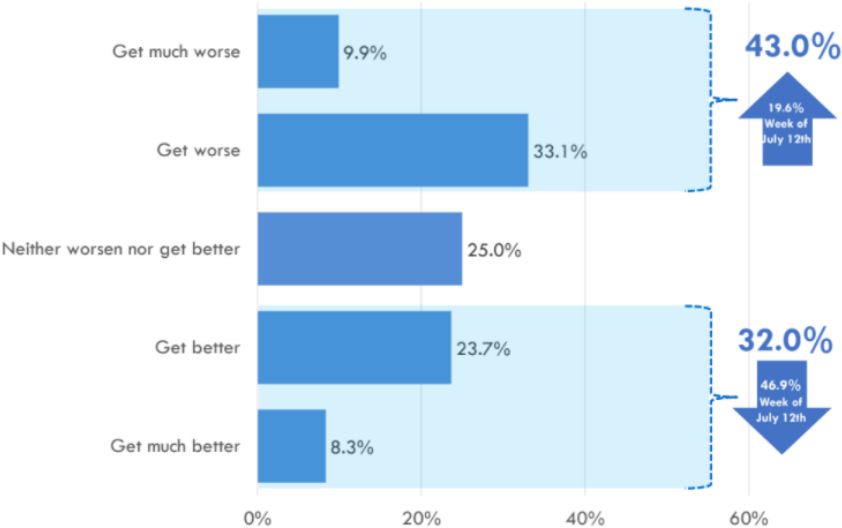
Updated to July 26, 2021

Destination Analysts: Rising US Pessimism About Pandemic

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

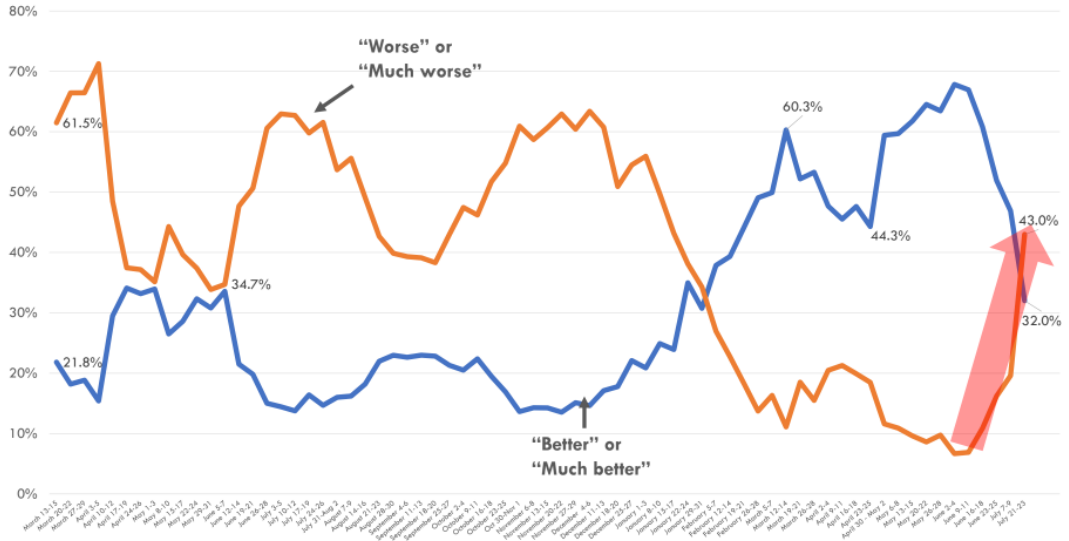


- Destination Analysts: ‘Traveller **sentiment has slipped into decline**, with many metrics declining in the last weeks.’ More than 4 in 10 American travellers expect the pandemic to worsen in the next month – a doubling of such sentiment from mid-July.

Destination Analysts: Rising US Pessimism About Pandemic

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

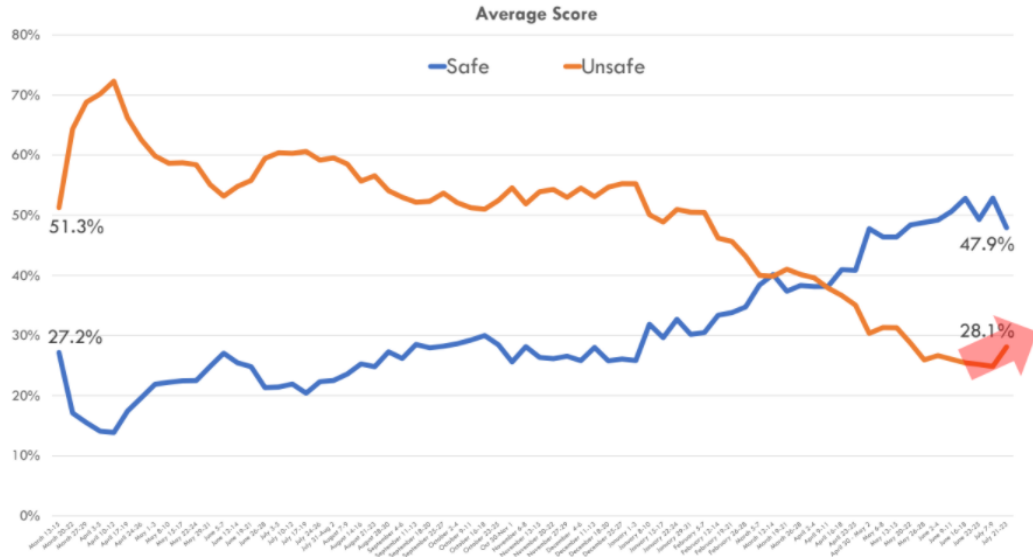
In the next month the coronavirus situation will



- The percentage of American travellers who think the pandemic situation will get worse in the next month (43%) is at its **highest point since January 2021**.

Destination Analysts: Safety Sentiment With Travel Activities Has Stalled

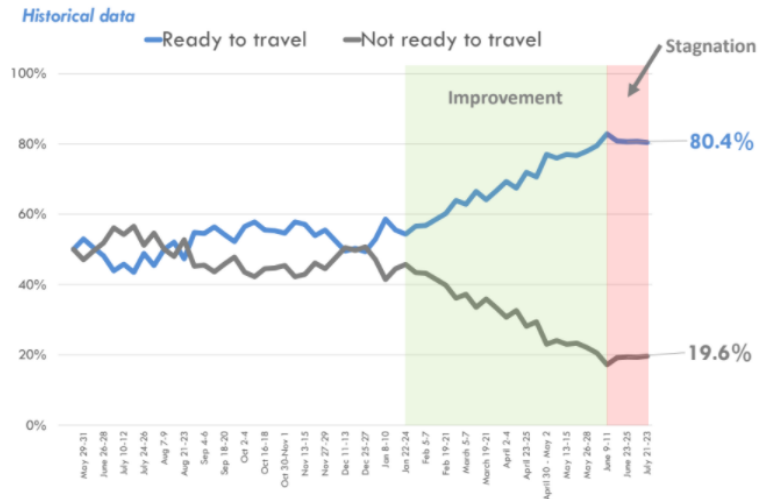
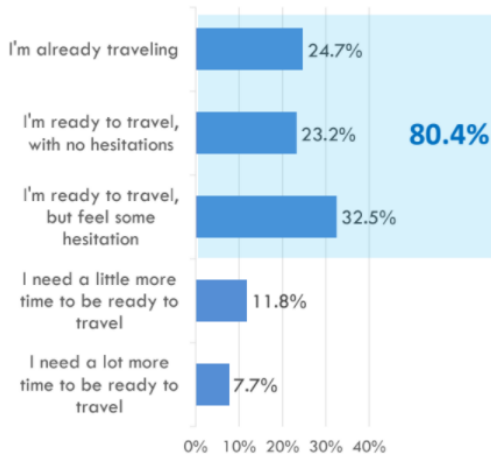
Question: At this moment, how safe would you feel doing each type of travel activity?



- Although one-half of US travellers feel safe participating in various types of travel activities, such sentiment has stalled, and the **share who feel unsafe appears to be on the rise.**

Destination Analysts: Travel State of Mind Sentiment is Stagnating

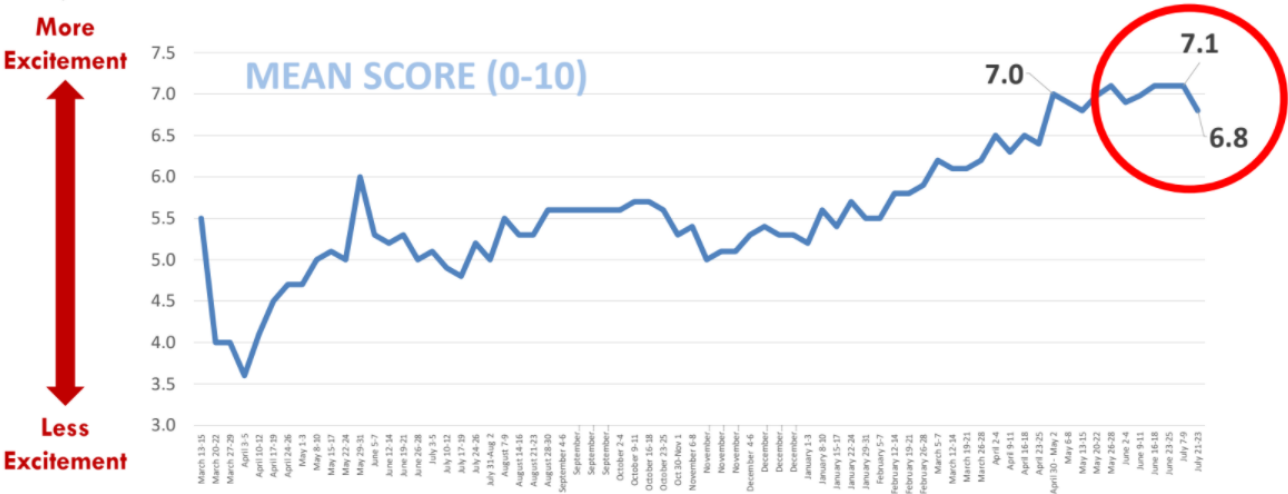
Question: When it comes to getting back out and traveling again, which best describes your current state of mind? (Select one)



- A large majority of US travellers are already travelling or feel ready to travel. The rapid **rise** in travel readiness seen throughout 2021, however, has **stalled**.

Destination Analysts: Excitement to Travel Stalled

Question: Imagine that a good friend (or close family member) asks you to take a weekend getaway with them sometime in the next month. How excited would you be to go? (Assume the getaway is to a place you want to visit)

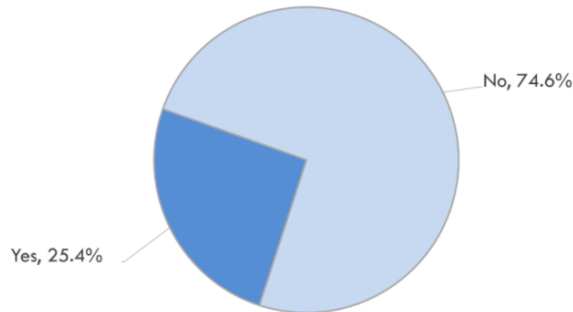


- Destination Analysts: As 'optimism about the coronavirus situation in the US has plummeted ... this **worsening expectation has impacted Americans' excitement to travel** right now.'

Destination Analysts: Fear of Delta Variant Impacting US Travel Plans

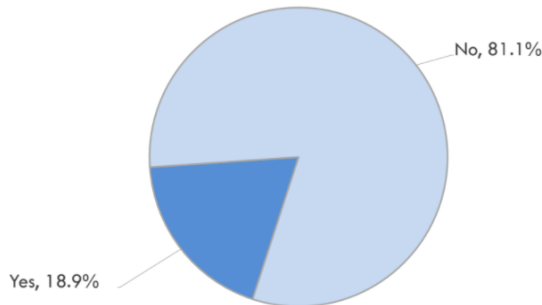
Question: Have you postponed any upcoming trips specifically due to the Delta variant?

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



Question: Have you cancelled any upcoming trips specifically due to the Delta variant?

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



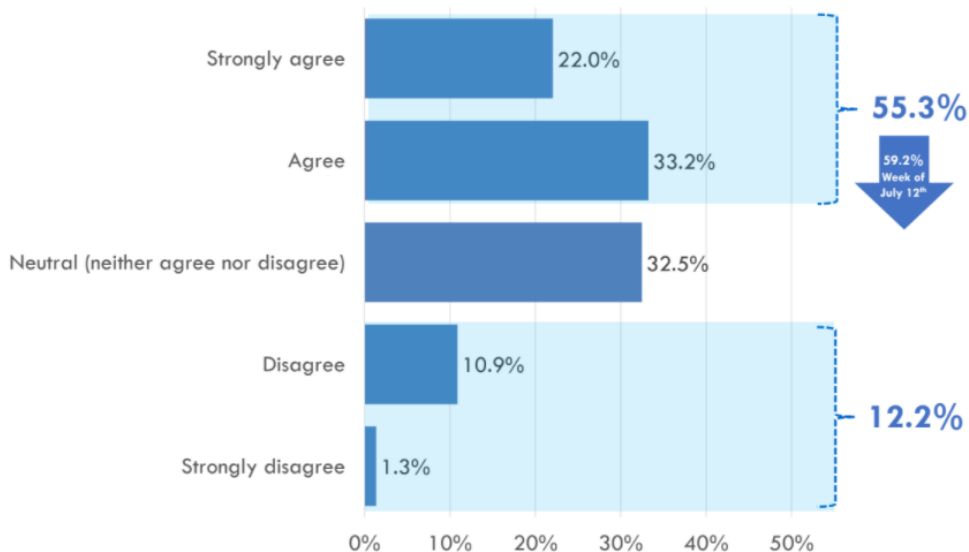
- **One-quarter of US travellers have postponed trips** because of fears of the Delta COVID-19 variant, while 2 in 10 have actually cancelled trips for that reason.

Destination Analysts: US Travellers Agree – Travel Prices Too High

Question: How much do you agree or disagree with the following statements?

Travel prices are generally too high right now.

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



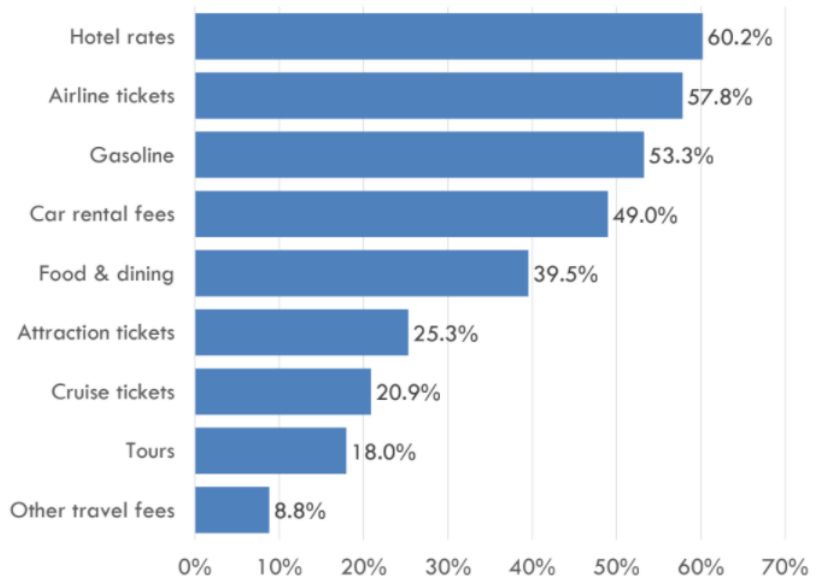
- More than one-half of American travellers say that **travel prices are too high**.

Destination Analysts: US Travellers Agree – Travel Prices Too High

Question: How much do you agree or disagree with the following statements?

Which travel prices do you feel are generally too high right now? (Select all that apply)

(Base: Wave 70 data. Respondents who believe travel prices are too high, 674 completed surveys. Data collected July 21-23, 2021)



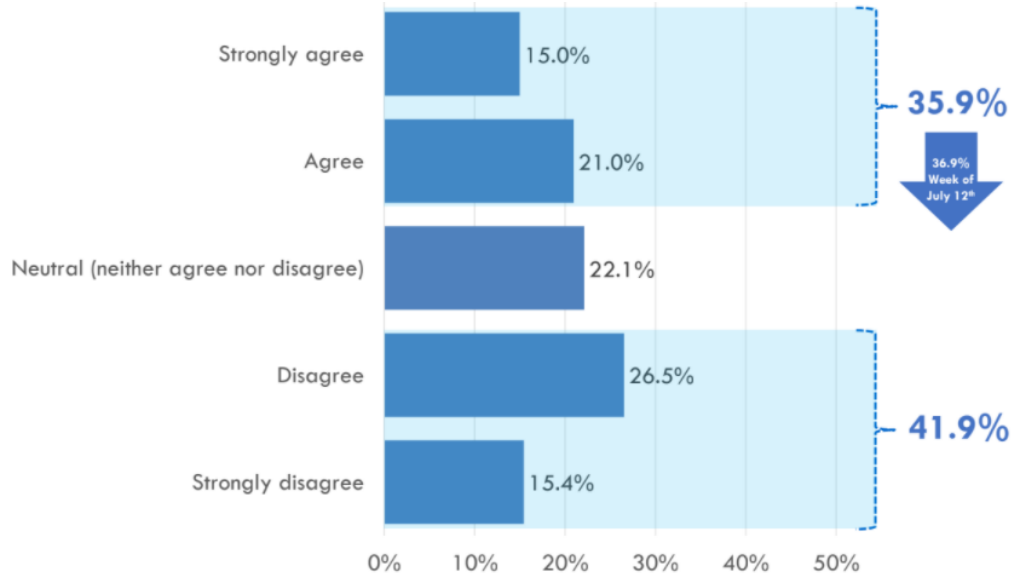
- Six in 10 American travellers say **hotels and airline tickets are too high**. Only a minority say food and dining, and attractions and tours are too expensive.

Destination Analysts: Prices Impacting Decision to Travel

Question: How much do you agree or disagree with the following statements?

High travel prices have kept me from traveling in the past month.

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



- More than one-third of US travellers say **high prices have prevented them from travelling** in the past month.

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