

COVID-19

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# 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

- **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](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. 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.

# 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

- Since the end of July, **domestic, Google search demand by Canadians** for flights and accommodations within Canada – although higher than last year – has been trending downwards. The trendline for International search demand for travel to Canada is stable.
- According to Statistics Canada, **trips to Canada by international travellers were down in June** over the previous month, while trips by Canadians to other countries were up. All such travel was down heavily from pre-pandemic levels in June 2019.
- The latest Destination Canada Travel Recovery Assessment says **all provinces and territories are now in the inter-provincial phase** of recovery, with residents in all parts of the country booking trips across provincial and territorial boundaries.

- Canadians in most regions are positive about their **communities being advertised as travel destinations to visitors from other parts of the country**, according to Destination Canada's latest Resident Sentiment survey. The exceptions are residents of British Columbia and Atlantic Canada, who are less enthusiastic about the idea than those in other regions.
- The federal government reports that the **number of active COVID-19 cases in Canada has doubled since mid-August**, with more than 33,000 cases as of September 2. Nationally, the **rate of active cases on** September 2 stood at 88 cases per 100,000 people, up from 45 per 100,000 two weeks earlier.
- Destination Analysts reports that amid increasing concern about the COVID-19 Delta variant, a majority of American travellers remain excited about the prospect of leisure travel. Even so, **two-thirds say they are unlikely to travel outside the United States until the pandemic has been resolved**.

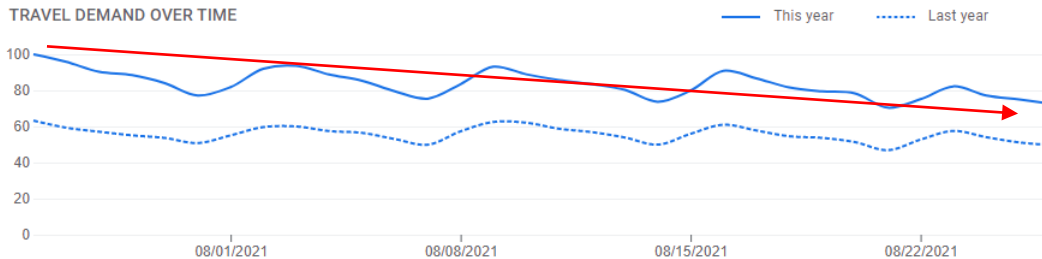
# Google Destination Insights

As of August 26, 2021

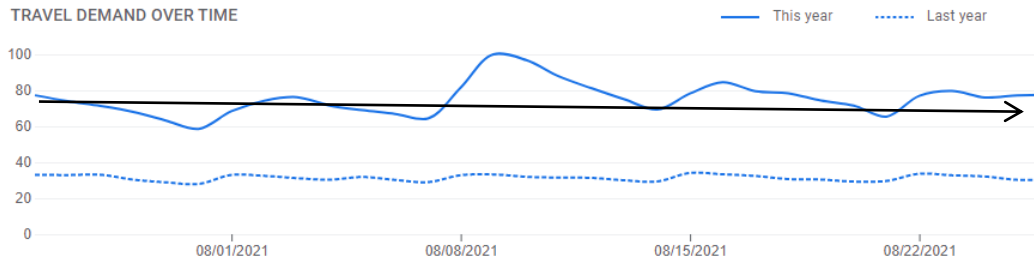


# Google Destination Insights: 30-Day Demand for Canada as a Destination

**Domestic** travel demand (Google searches by Canadians for flights and accommodation) for trips within Canada. **July 26 – August 26, 2021.** Demand is scored by search volume on an index of 0-100.



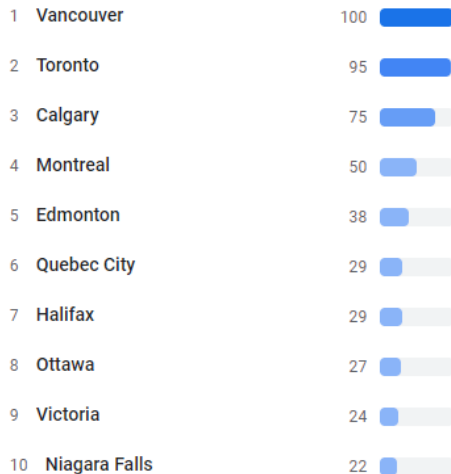
**International** travel demand (Google searches worldwide for flights and accommodation) for trips to Canada. **July 26 – August 26, 2021.** Demand is scored by search volume on an index of 0-100.



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

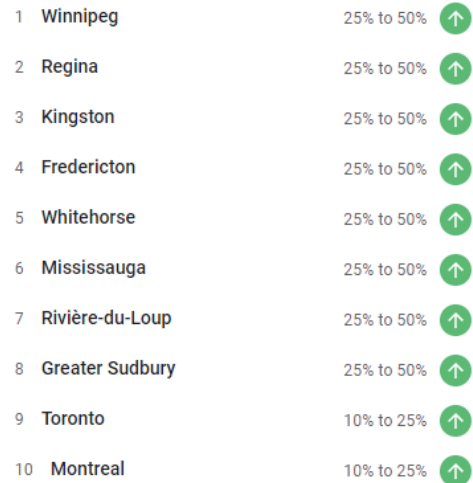
Cities are scored on an index of 0-100, based on domestic Google search demand by Canadians between **July 26 – August 26, 2021** for flights to and accommodations in Canadian cities.

TOP DEMAND BY DESTINATION CITY



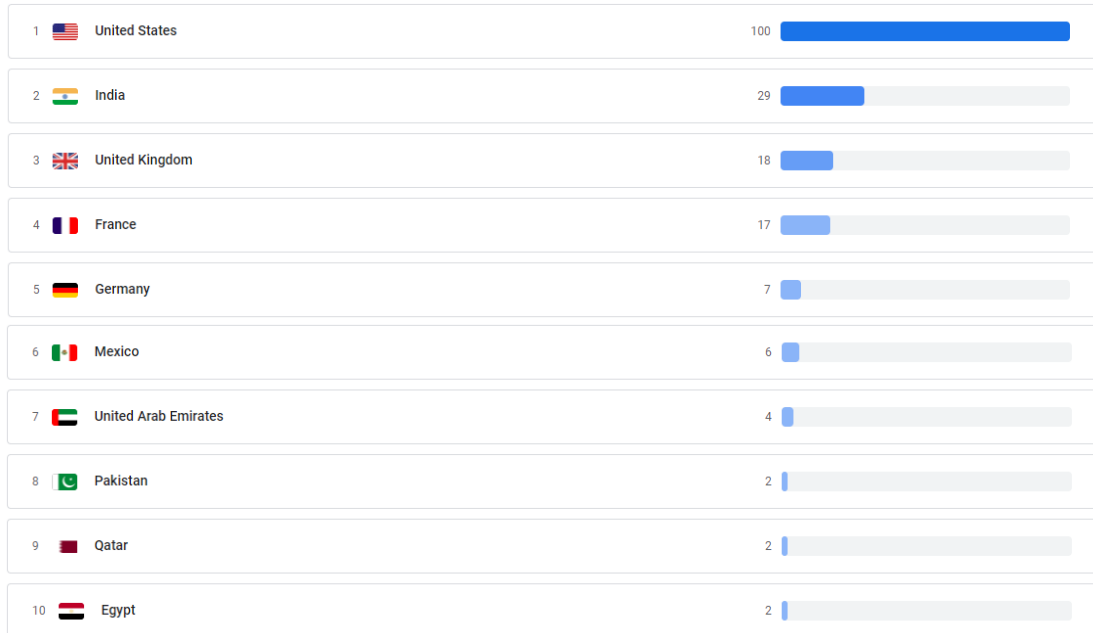
Growth is the *% change* in domestic Google travel search demand in the period **July 26 – August 26, 2021** compared to the previous 30-day period.

TOP GROWTH BY DESTINATION CITY



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

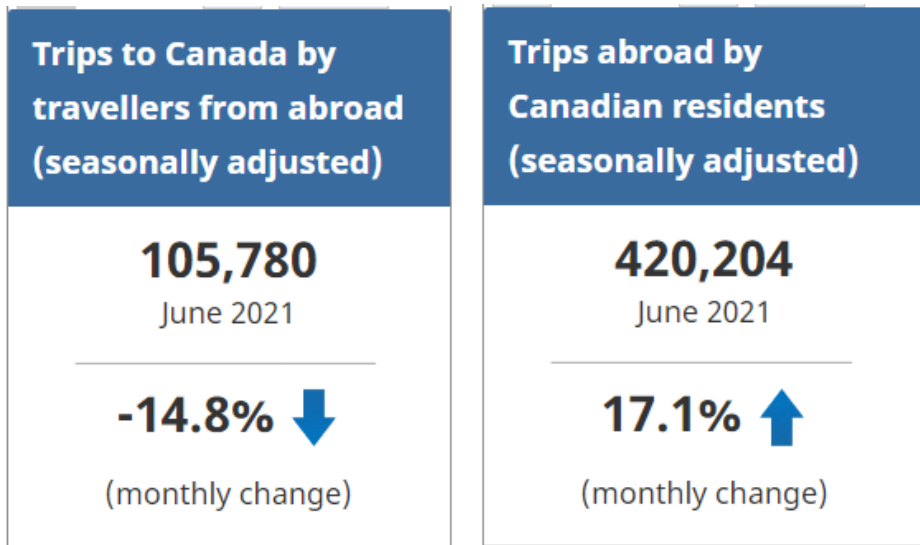
Top sources of worldwide search demand for international travel to Canada. Search period: **July 26 – August 26, 2021**. Countries are scored by search volume, on an index of 0-100.



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

Released August 20, 2021

# Statistics Canada: Travel Between Canada and Other Countries



- Trips to Canada by travellers from other countries were **down almost 15%** in June from the previous month, and down 96% from pre-pandemic levels in June 2019.
- Trips to other countries by Canadians were **up 17%** in June from the previous month, but down 91% from pre-pandemic levels in June 2019.

# Destination Canada: Travel Recovery Assessment

Updated to August 17, 2021

# Destination Canada Provincial Travel Recovery Assessment

Timeline of overall assessment for each province and territory:

	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	27-Jul	03-Aug	10-Aug	17-Aug
British Columbia	III	II	II	II	II	II	II	II	II	III	III	IV	IV	IV	IV	IV	IV	IV	IV
Alberta	IV	IV	II	II	II	II	II	II	II	II	IV	IV	IV	IV	IV	IV	IV	IV	IV
Saskatchewan	II	II	II	II	II	II	II	II	II	II	II	IV	IV	IV	IV	IV	IV	IV	IV
Manitoba	II	II	II	II	II	II	II	II	II	II	II	II	IV	IV	IV	IV	IV	IV	IV
Ontario	II	II	II	II	II	II	II	II	II	II	III	IV	IV	IV	IV	IV	IV	IV	IV
Quebec	IV	IV	II	II	II	II	II	III	III	III	III	IV	IV	IV	IV	IV	IV	IV	IV
New Brunswick	III	III	III	III	III	III	III	III	III	III	III	III	IV	IV	IV	IV	IV	IV	IV
Nova Scotia	III	III	III	III	III	II	II	II	II	II	III	III	III	III	IV	IV	IV	IV	IV
Prince Edward Island	III	III	III	III	III	III	III	III	III	III	III	III	III	III	III	III	III	IV	IV
Newfoundland & Labrador	III	III	III	III	III	III	III	III	III	III	III	III	III	III	III	III	III	IV	IV
Yukon	II	II	II	II	II	II	II	II	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV
Northwest Territories	III	III	III	III	III	III	III	III	III	III	III	III	IV	IV	IV	IV	IV	IV	IV
Nunavut	III	III	III	III	II	II	II	III	III	III	IV	IV	IV	IV	IV	IV	IV	IV	IV

Legend:

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

<b>I</b> COVID-19 Response	<b>II</b> Hyper Local	<b>III</b> Intra-prov	<b>IV</b> Inter-prov	<b>V</b> Tentative Int'l	<b>VI</b> 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 **August 17**:

- Prince Edward Island and Newfoundland and Labrador have progressed from the **Intra-provincial (III)** phase into the **Inter-provincial (IV)** phase of recovery.
- All provinces and territories are now in the **Inter-provincial (IV)** phase.



# Destination Canada: Resident Sentiment Survey

Updated to August 24, 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	83	88	87	87	82	88	96	91
Communities in my province	74	86	80	80	80	85	89	89
Other provinces in Canada	50	69	59	64	65	44	39	50
The United States	22	39	31	27	31	14	11	17
Other countries	19	27	25	25	30	14	9	18
<b>SAMPLE SIZE</b>	<b>208</b>	<b>200</b>	<b>200</b>	<b>610</b>	<b>409</b>	<b>200</b>	<b>130</b>	<b>69</b>

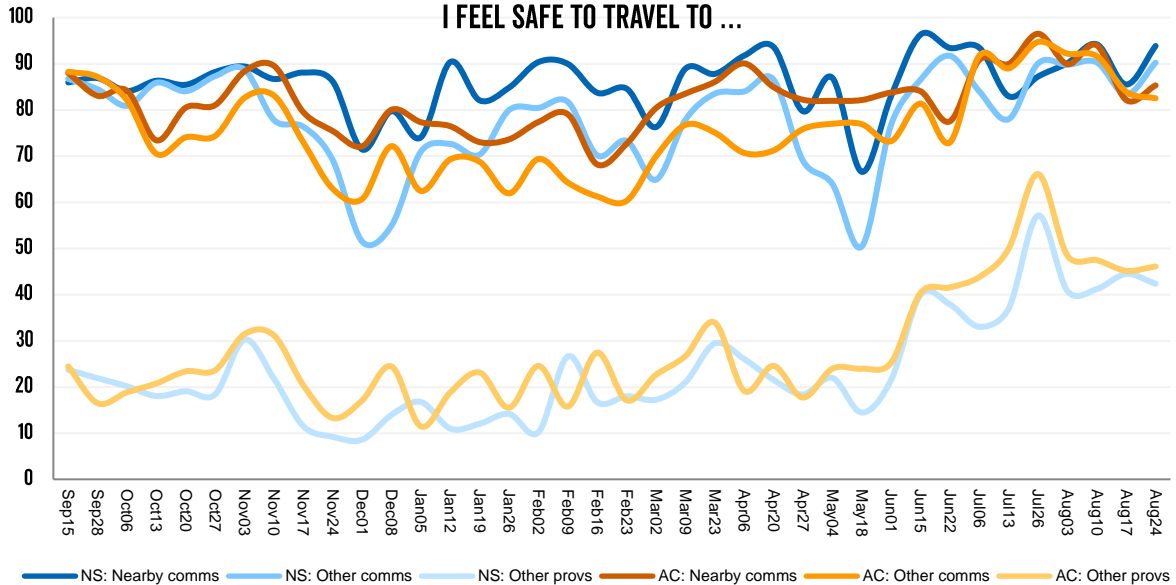
- % Somewhat / Strongly Agree
- Note: red/green text indicates a significant difference between regions.
- Results from week of August 24 2021.

# 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, only a minority feel safe travelling *internationally*.
- About 60% of Canadians in most regions, including Ontario, 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 provinces remain very high, while their comfort level with *international travel* is the lowest in the country.

# 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						ATLANTIC CANADA	
	BC	AB	SK / MB	ON	QC	ATL	Rural	Urban
Other communities near me	73	77	75	71	74	83	93	83
Other parts of my province	63	75	69	67	76	83	89	85
Other parts of Canada	41	67	57	59	63	47	43	51
The United States	18	38	30	26	31	20	13	25
Other countries	18	32	27	24	28	17	11	21
<b>SAMPLE SIZE</b>	<b>208</b>	<b>200</b>	<b>200</b>	<b>610</b>	<b>409</b>	<b>200</b>	<b>130</b>	<b>69</b>

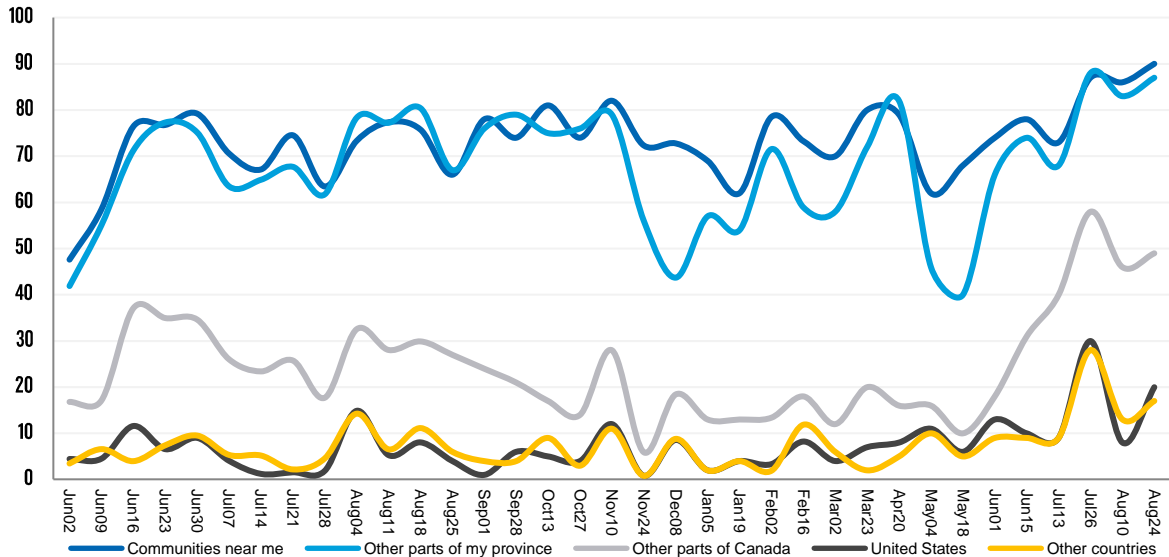
- % Somewhat / Strongly Agree
- Note: red/green text indicates a significant difference between regions.
- Results from week of August 24 2021.

# Destination Canada Resident Sentiment – Welcoming Visitors

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

# 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 – 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	+37	+43	+37	+27	+42	+53	+45	+57
Other parts of my province	+18	+40	+33	+22	+40	+52	+48	+53
Other parts of Canada	-1	+29	+18	+14	+28	+9	-4	+14
The United States	-37	-13	-22	-39	-20	-39	-50	-35
Other countries	-39	-15	-23	-38	-20	-43	-53	-38
SAMPLE SIZE	200	200	200	606	409	200	121	78

- 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 17, 2021.



# Destination Canada Resident Sentiment – Promoting Home Community to Visitors

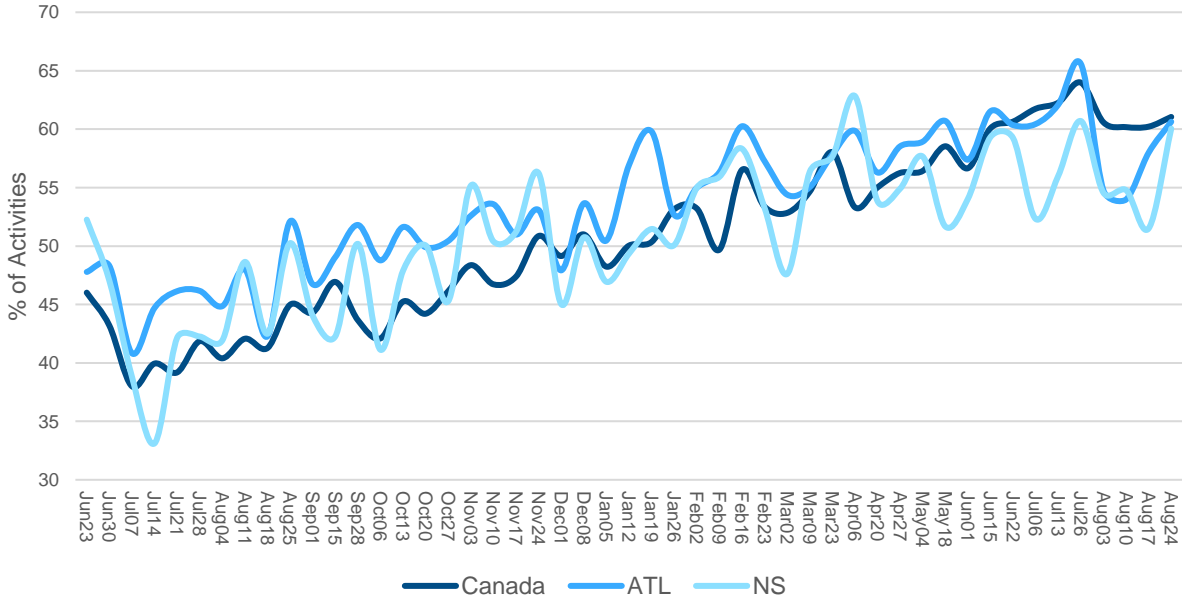
- Canadians in all regions are positive about their communities being promoted as places to visit to people living in *nearby communities* and *other parts of their own province*. Atlantic Canadians are the most positive in this regard.
- All regions are neutral or positive about having their communities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

# Destination Canada – Comfort With Activities, Most/Least Comfortable

Activity	Canada	Atlantic Canada	Nova Scotia
<b>Activities most comfortable with:</b>			
Allowing in-home renovations	86	87	86
Shopping at the mall	80	81	79
Going back to your workplace/office	79	89	86
Dining in restaurants	76	76	73
<b>Activities least comfortable with:</b>			
Flying on an airplane	<b>48</b>	<b>39</b>	<b>33</b>
Large gatherings such as sporting events, concerts, festivals	44	50	49
Going to bars, lounges, night clubs, pubs	45	47	48
Travelling to the United States	<b>40</b>	<b>22</b>	<b>21</b>
<b>SAMPLE SIZE</b>	<b>1827</b>	<b>200</b>	<b>99</b>

- % Comfortable with each activity, among applicable
- Results from week of August 24, 2021.

# 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

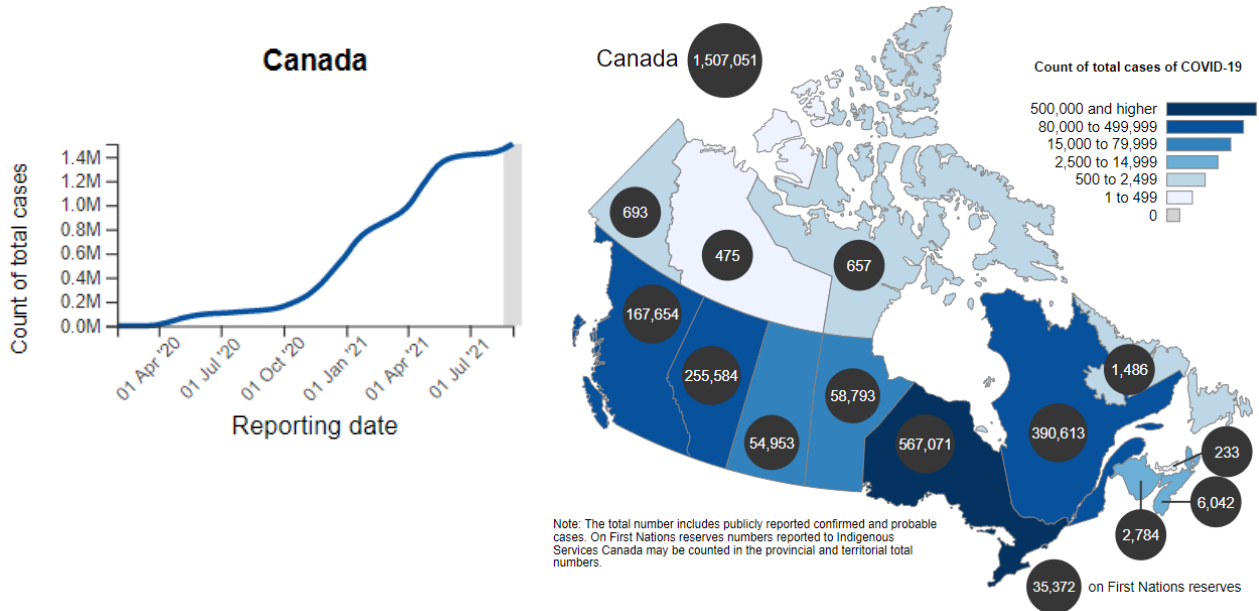
- Respondents were asked: *Once the governments lift the protective measures put in place to fight COVID-19, which of the following would you be comfortable doing...*
- The overall percentage of activities that Canadians are comfortable with has been gradually increasing over the course of 2021.
- Among those activities Canadians are least comfortable with, a large minority – at least four 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 *fly on an airplane, or travel to the US.*

# Government of Canada COVID-19 Status

As of September 2, 2021

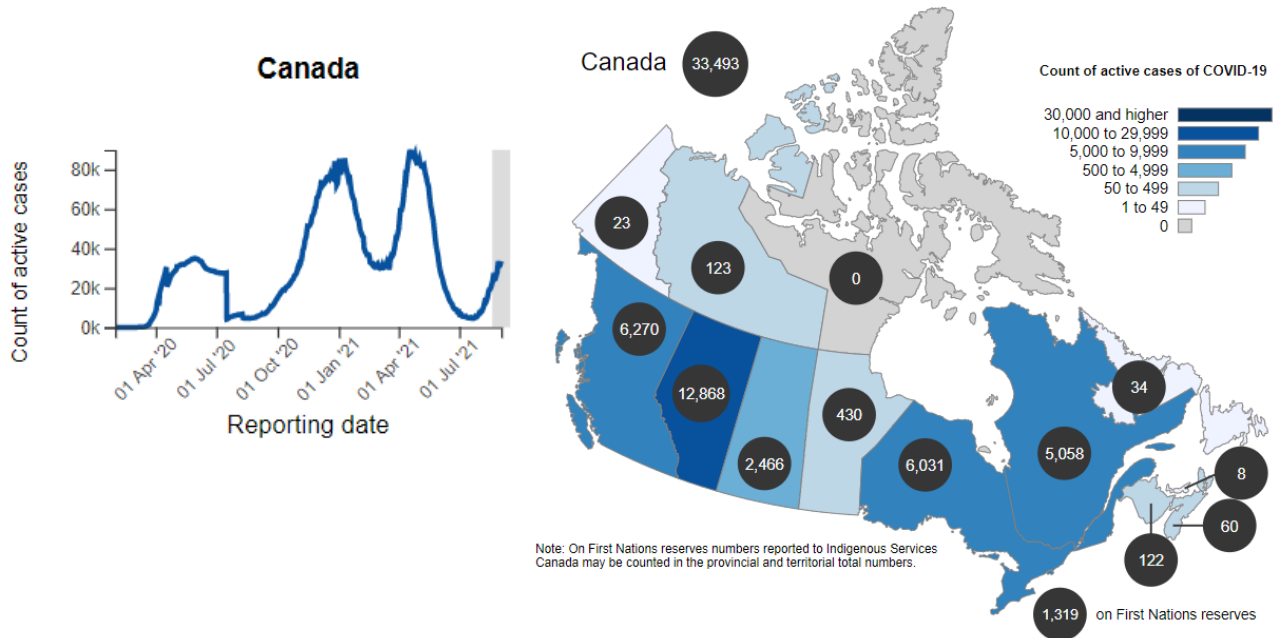
# Government of Canada – COVID-19 Count of *Total* Cases

- The count of total cases of COVID-19 in **Canada** was **1,507,051** as of September 2, 2021



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

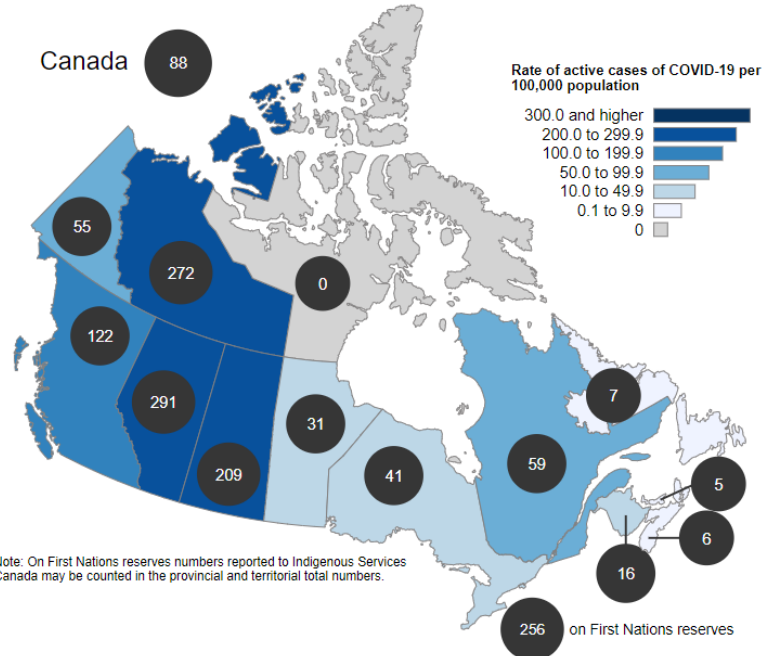
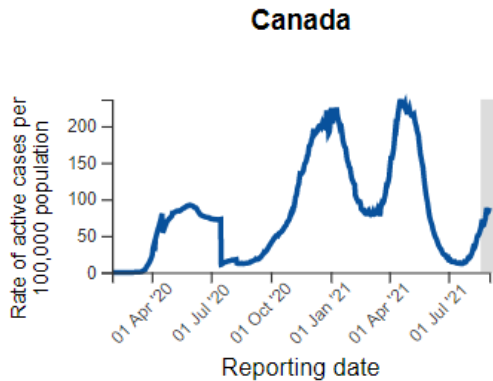
- The count of active cases of COVID-19 in **Canada** was **33,493** as of September 2, 2021



# Government of Canada – COVID-19

## Rate of Active Cases

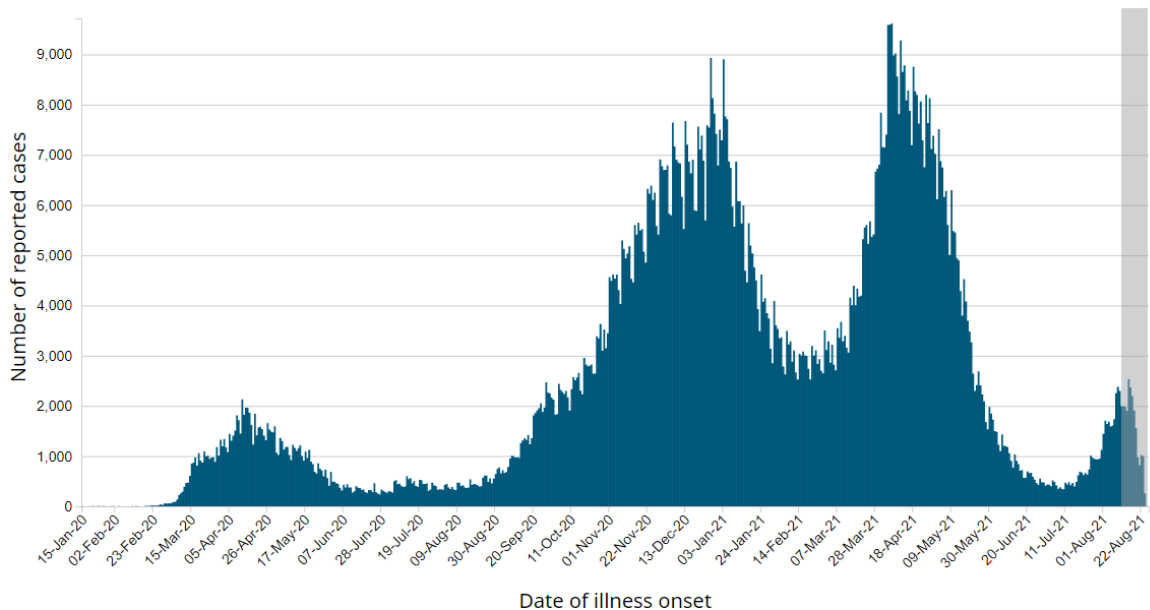
- The rate of active cases of COVID-19 in **Canada** was **88 per 100,000 population** as of September 2, 2021



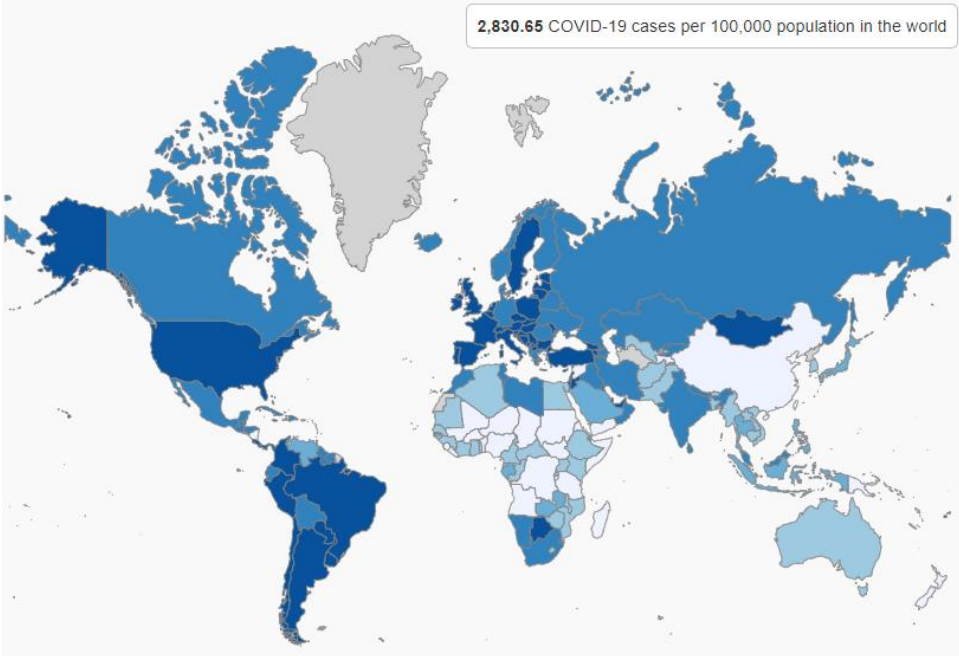


# Government of Canada – COVID-19 Cases by *Date* (Epidemic Curve)

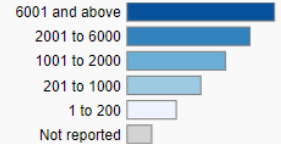
Total COVID-19 cases in Canada (n=1,478,028) by date of illness onset, as of August 27, 2021.



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

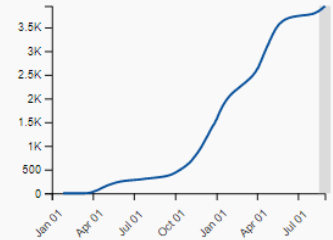


Number of cases per 100,000 population of COVID-19



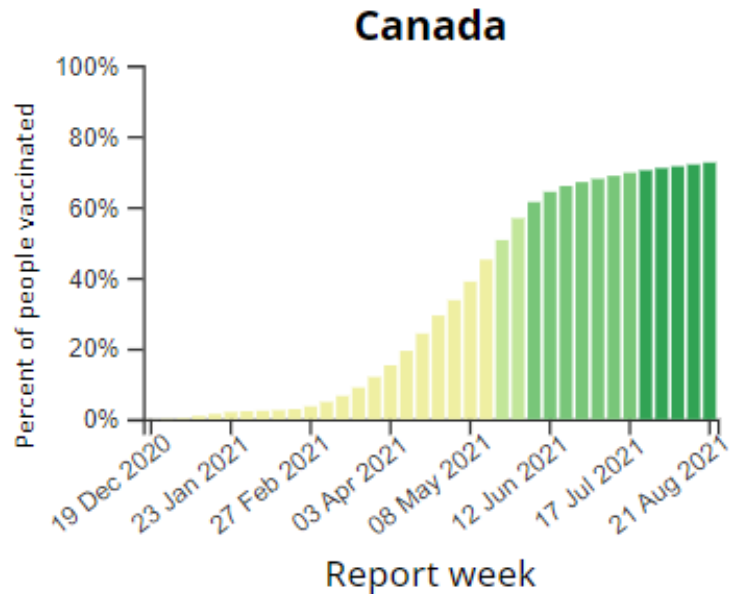
## Canada

3,951.25 COVID-19 cases per 100,000 population as of August 30th, 2021.



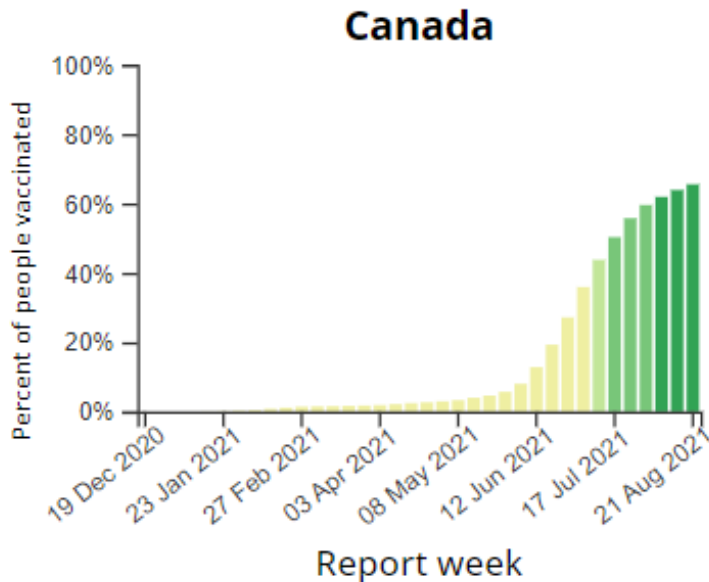
# Government of Canada – Percentage With At Least 1 Vaccine Dose

The cumulative percent of the population who have received **at least one dose** of a COVID-19 vaccine in Canada was **72.50%** as of August 21, 2021.



# Government of Canada – Percentage Fully Vaccinated

The cumulative percent of the population **fully vaccinated** with a COVID-19 vaccine in Canada was **65.49%** as of August 21, 2021.



# Nova Scotia COVID-19 Cases

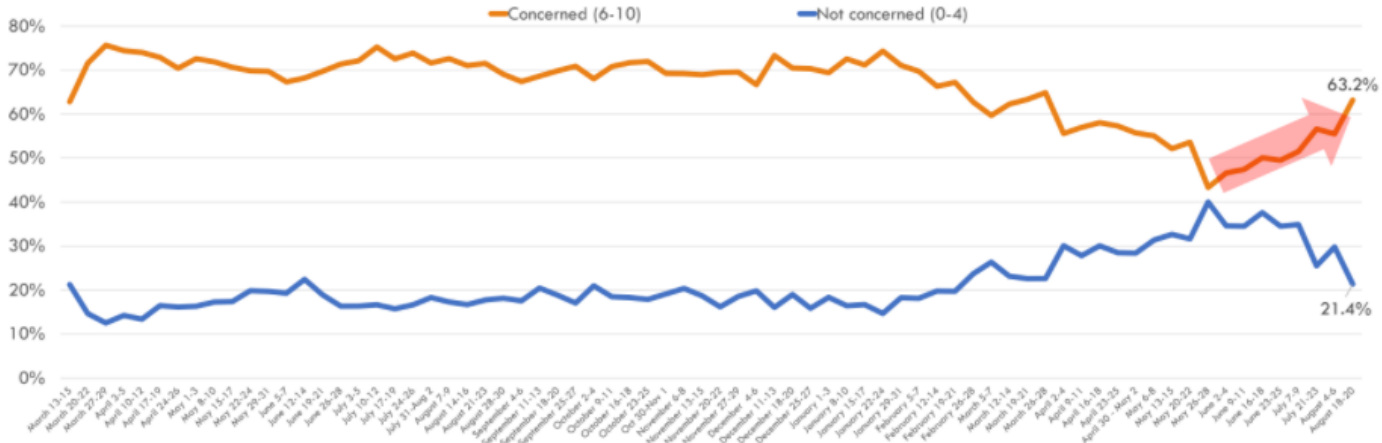
- The Province of Nova Scotia provides daily updates of new cases of COVID-19, total active cases of COVID-19, and cumulative cases of COVID-19, as well as doses of COVID-19 administered within the province.
- See the Province of Nova Scotia's COVID-19 data dash board at: <https://novascotia.ca/coronavirus/data/#dashboard>

# Destination Analysts American Travel Sentiment Tracker

Updated to August 24, 2021

# Destination Analysts: US Travellers Increasingly Fearful Of Getting COVID-19

**Question:** Thinking about the current coronavirus situation, in general, HOW CONCERNED ARE YOU PERSONALLY about contracting the virus? (Please answer using the scale below)



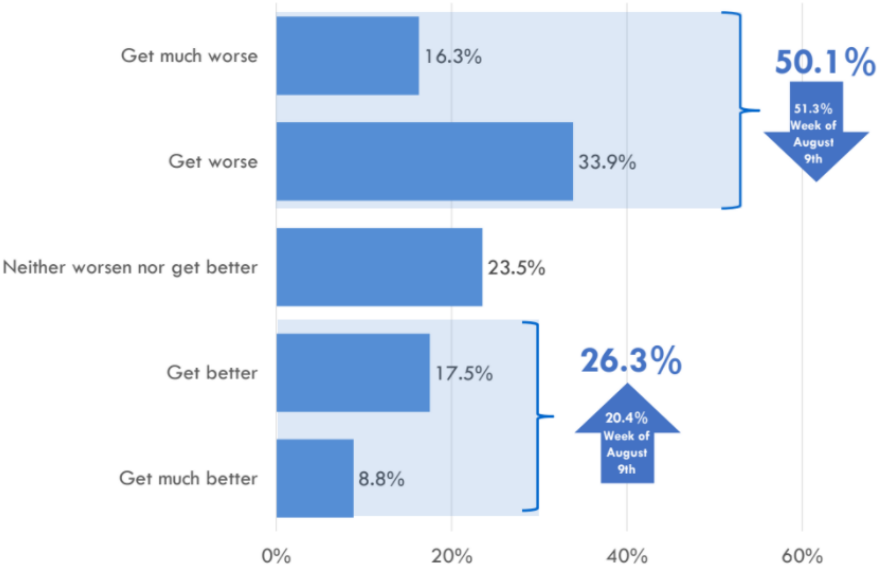
- A majority of US travellers are worried about contracting COVID-19, and such fear continues to rise, with the percentage of those concerned reaching its highest point since late March.

# Destination Analysts: Half of 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? (Select one)

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

*(Base: Wave 72 data. All respondents, 1,212 completed surveys. Data collected August 18-20, 2021)*



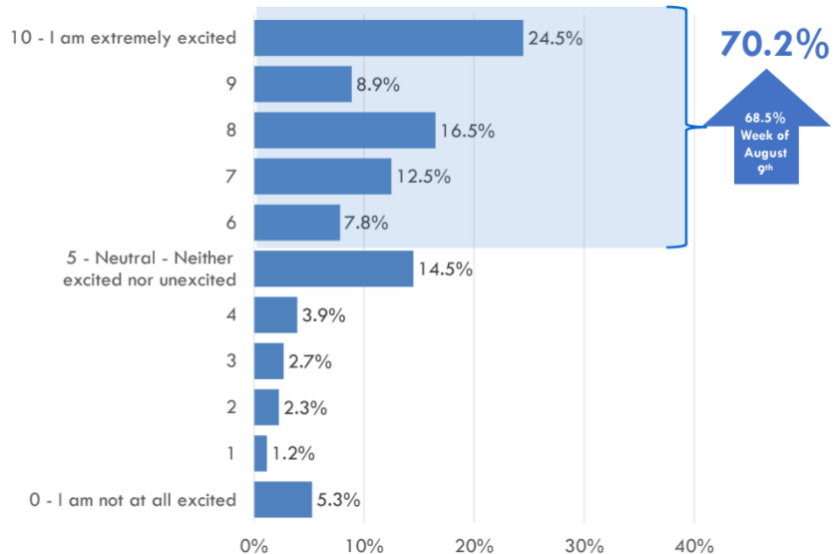
- Half of American travellers expect the pandemic to worsen in the United States over the next month.



# Destination Analysts: Most US Tourists Still ‘Excited’ About Leisure Travel

**Question:** Which best describes how excited you are about **LEISURE TRAVEL** in the **NEXT TWELVE (12) MONTHS?** (Please answer using the 11-point scale below)

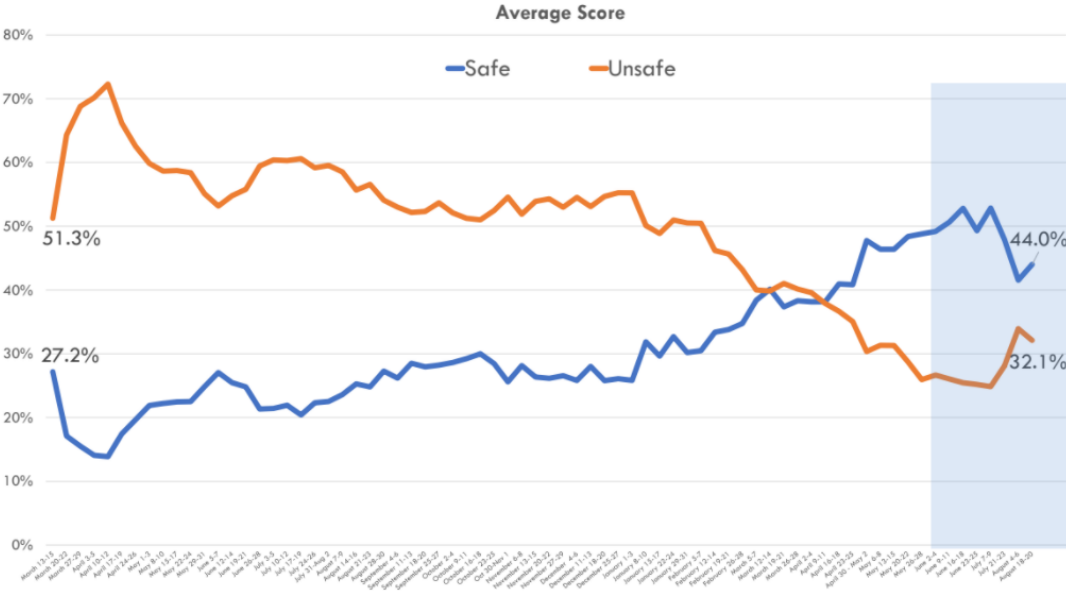
*(Base: Wave 72 data. All respondents, 1,212 completed surveys. Data collected August 18-20, 2021)*



- Despite pandemic concerns, seven in 10 American travellers say they’re excited – including one-quarter who say they’re ‘extremely excited’ – about taking a leisure trip over the next 12 months.

# Destination Analysts: US Travellers Have Mixed Feelings About Safety of Activities

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

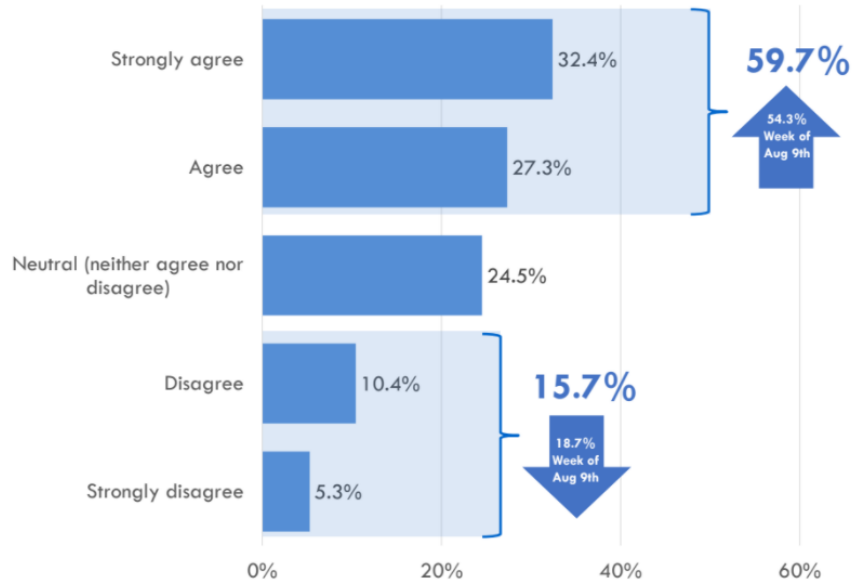


- American travellers express mixed feelings about the safety of participating in various activities while travelling. More than four in 10 feel 'safe' overall, while one-third feel 'unsafe'.

# Destination Analysts: US Travellers Less Interested in Travel Due to Delta Variant

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

*(Base: Wave 72 data. All respondents, 1,212 completed surveys. Data collected August 18-20, 2021)*

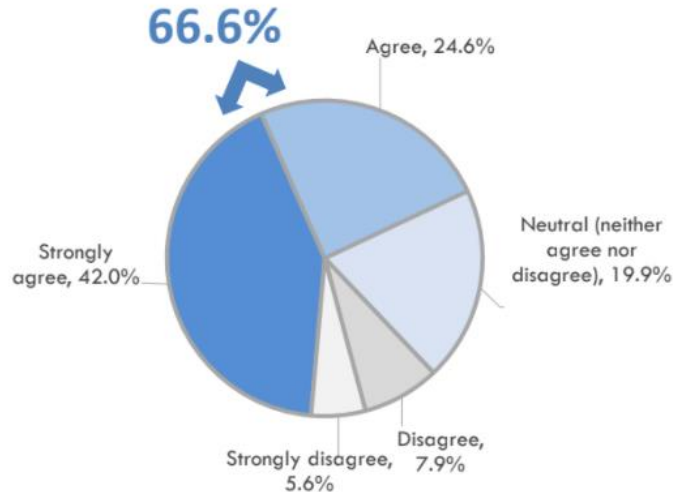


- News and awareness of the COVID-19 Delta variant is increasingly dampening interest in travel among potential US travellers.

# Destination Analysts: Most US Travellers Won't Travel Outside US During Pandemic

**How much do you agree with the following statement?**

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



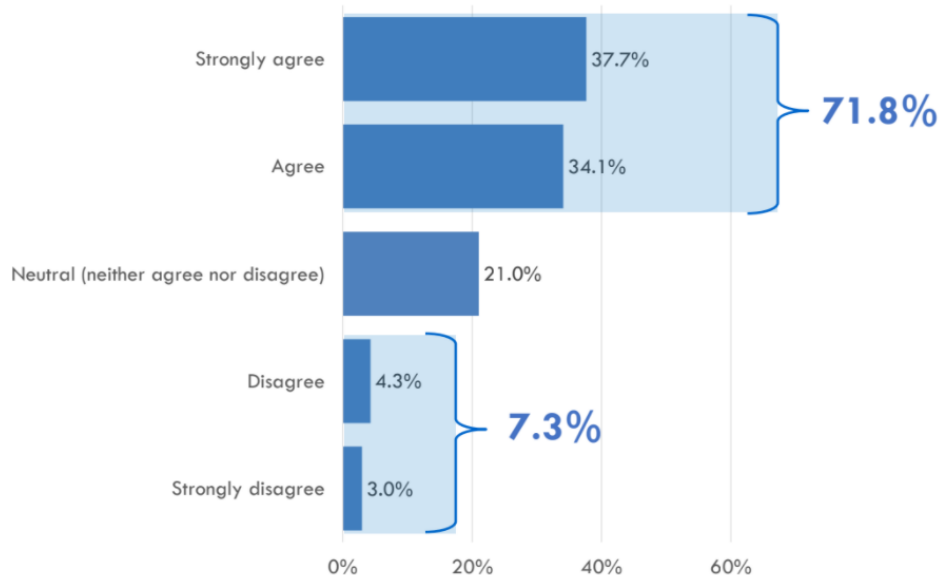
- Two-thirds of American travellers say they're unlikely to travel outside the United States until the COVID-19 pandemic is over.

# Destination Analysts: A Welcoming Image Is Critical in Attracting US Visitors

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

**If I thought a destination was NOT WELCOMING to people like myself, I would be unlikely to visit.**

*(Base: Wave 69-72 data. All respondents, 4,830 completed surveys. Data collected August 18-20, 2021)*



- Seven in 10 American travellers aren't interested in visiting a destination that they consider unwelcoming to visitors such as themselves.

