

COVID-19

Recovery Signals Digest

A Roundup of
Travel Recovery Insights

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Introduction

The Recovery Signals Digest is a regular 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.
- **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.

Source Notes and Methodology

- The **Government of Canada's** COVID-19 data ([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

- For the second consecutive four-week period, **India ranks as the second highest source of international Google search demand** for travel to Canada, according to Google Destination Insights. After the United States, India exceeds all countries including the UK, France and Australia for online search demand about flights to and accommodations in Canada.
- New data from Statistics Canada shows that **travel between Canada and other countries** was up about 25% in July from the previous month but was still sharply down from pre-pandemic levels in July 2019.
- The latest Destination Canada Travel Recovery Assessment says **all provinces and territories were in the *Inter-provincial* phase** of recovery as of the end of August, with residents in all parts of the country booking trips across provincial and territorial boundaries.

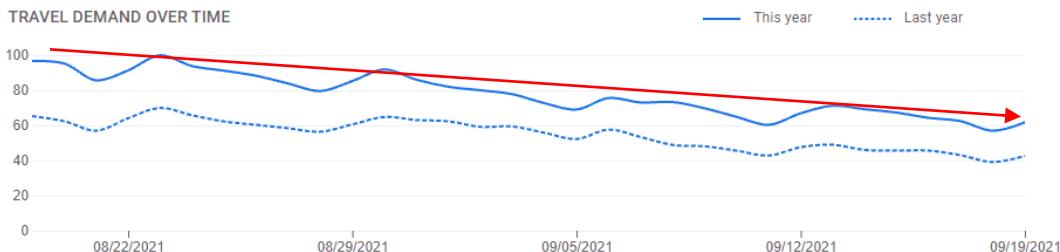
- Canadians are aligned into two distinct groups when it comes to the perceived **safety of travelling to other provinces**. According to Destination Canada's Resident Sentiment survey, a majority of residents in Alberta, Ontario and Quebec feel safe travelling to other parts of the country, while in British Columbia, the Prairies and Atlantic Canada only a minority of residents feel safe travelling outside their own provinces.
- The federal government reports that the **number of active COVID-19 cases in Canada continues to rise**, with more than 45,000 cases as of September 24. Nationally, the **rate of active cases on** September 24 stood at 119 cases per 100,000 people, up from 88 per 100,000 three weeks earlier.
- Destination Analysts reports tentative signs of **optimism among US travellers about a 'return to normal' in terms of leisure activities**. Although only a minority of travellers believe the US is more than half-way back to normal when it comes to dining and travel, that minority grew for the first time in several months, up to 35% in mid-September from a low of 31% two weeks earlier.

Google Destination Insights

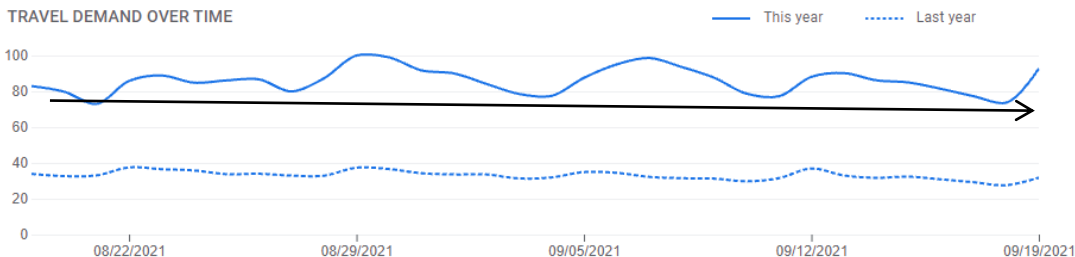
As of September 19, 2021

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. **Aug. 19 to Sep. 19, 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. **Aug. 19 to Sep. 19, 2021.** Demand is scored by search volume on an index of 0-100.



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

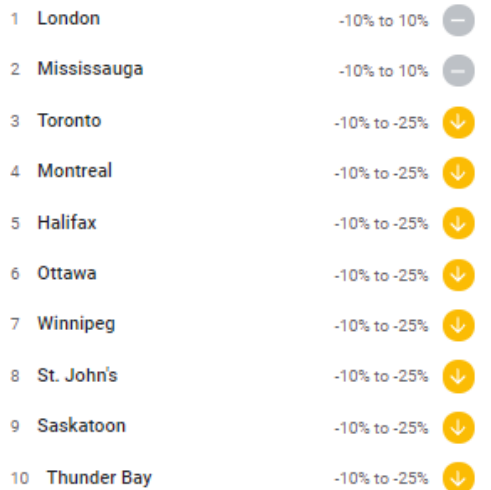
Cities are scored on an index of 0-100, based on domestic Google search demand by Canadians between **Aug. 19 to Sep. 19, 2021** for flights to, and accommodations in Canadian cities.

TOP DEMAND BY DESTINATION CITY



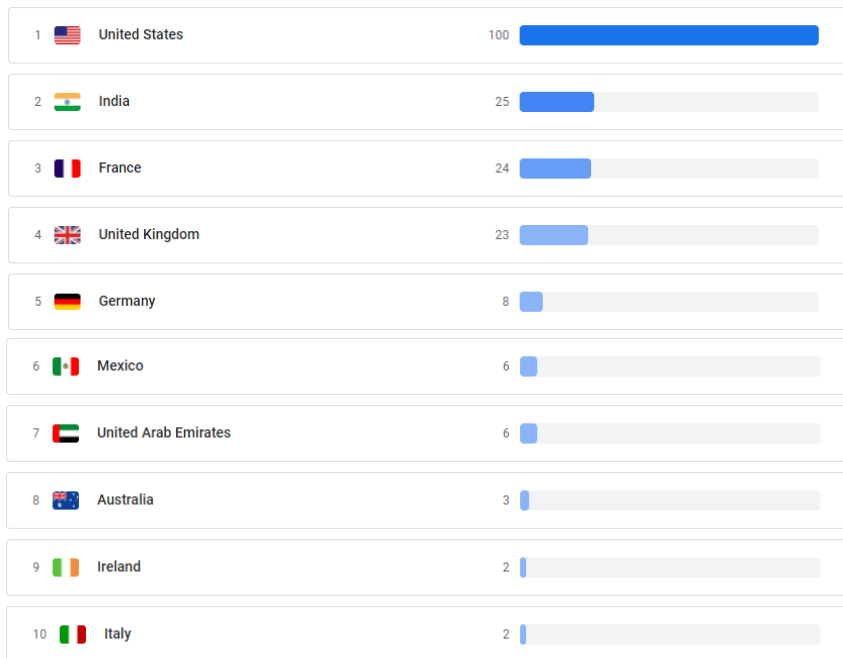
Growth is the % *change* in domestic Google travel search demand in the period **Aug. 19 to Sep. 19, 2021** compared to the previous 30-day period.

TOP GROWTH BY DESTINATION CITY



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

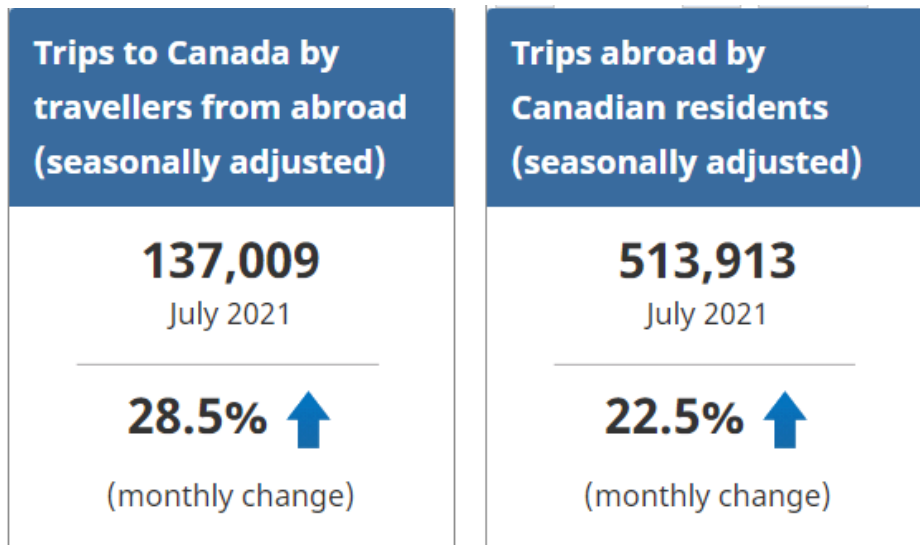
Top sources of worldwide search demand for international travel to Canada. Search period: **Aug. 19 to Sep. 19, 2021**. Countries are scored by search volume, on an index of 0-100.



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

Released September 22, 2021

Statistics Canada: Travel Between Canada and Other Countries



- Trips to Canada by travellers from other countries were **up 29%** in July from the previous month, and down 94% from pre-pandemic levels in July 2019.
- Trips to other countries by Canadians were **up 23%** in July from the previous month, but down 90% from pre-pandemic levels in July 2019.

Destination Canada: Travel Recovery Assessment

Updated to August 31, 2021

Destination Canada Provincial Travel Recovery Assessment

Timeline of overall assessment for each province and territory:

	25-May	1-Jun	8-Jun	15-Jun	22-Jun	29-Jun	6-Jul	13-Jul	20-Jul	27-Jul	3-Aug	10-Aug	17-Aug	24-Aug	31-Aug
British Columbia	II	II	II	III	III	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV
Alberta	II	II	II	II	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV
Saskatchewan	II	II	II	II	II	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV
Manitoba	II	II	II	II	II	II	IV	IV	IV	IV	IV	IV	IV	IV	IV
Ontario	II	II	II	II	III	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV
Quebec	II	III	III	III	III	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV
New Brunswick	III	III	III	III	III	III	IV	IV	IV	IV	IV	IV	IV	IV	IV
Nova Scotia	II	II	II	II	III	III	III	III	IV	IV	IV	IV	IV	IV	IV
Prince Edward Island	III	III	III	III	III	III	III	III	III	III	III	IV	IV	IV	IV
Newfoundland & Labrador	III	III	III	III	III	III	III	III	III	III	IV	IV	IV	IV	IV
Yukon	II	II	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV
Northwest Territories	III	III	III	III	III	III	IV	IV	IV	IV	IV	IV	IV	IV	IV
Nunavut	II	III	III	III	IV	IV	IV	IV	IV	IV	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 **August 31**:

- All provinces and territories remain in the **Inter-provincial (IV)** phase of recovery.
- There has been no change to the assessment since August 10.

Destination Canada: Resident Sentiment Survey

Updated week of September 14, 2021

Destination Canada Resident Sentiment – Safety of Travel

- 'I feel safe to travel to...'

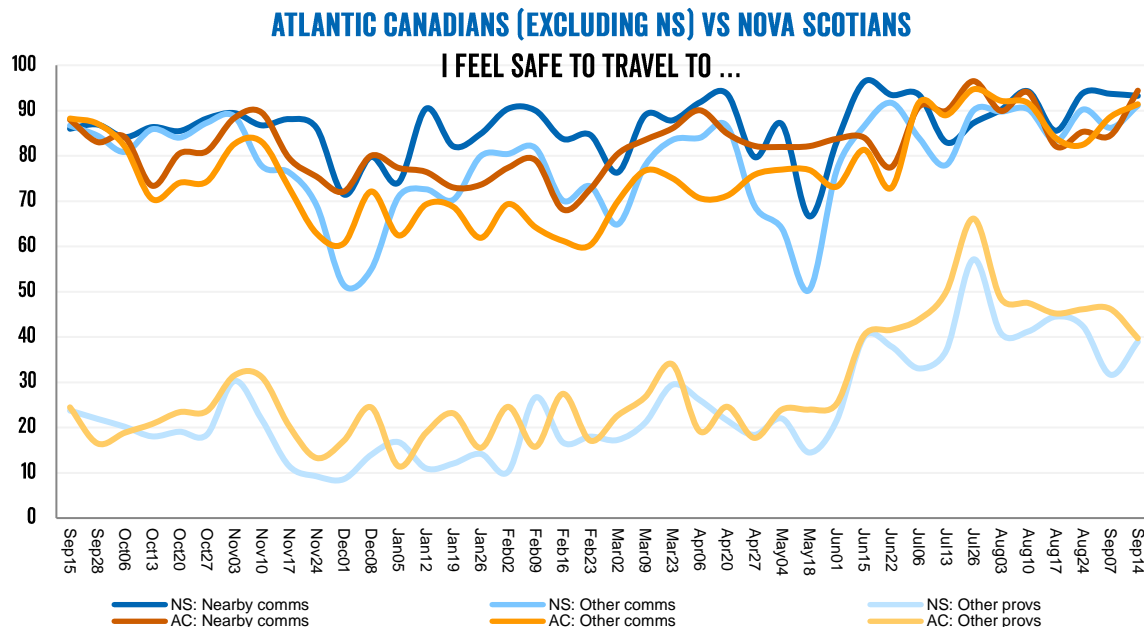
	REGION OF RESIDENCE						ATLANTIC CANADA	
	BC	AB	SK / MB	ON	QC	ATL	Rural	Urban
Communities near me	77	83	74	83	77	93	98	91
Communities in my province	58	79	69	77	78	90	89	91
Other provinces in Canada	35	66	42	57	62	39	43	37
The United States	16	37	24	22	29	7	9	6
Other countries	16	33	22	22	30	10	7	12
SAMPLE SIZE	208	206	204	611	420	200	116	84

- % Somewhat / Strongly Agree
- Note: red/green text indicates a significant difference between regions.
- Results from week of September 14 2021.

Destination Canada Resident Sentiment – Safety of Travel

- A majority of Canadians report feeling safe travelling *to nearby communities* and *elsewhere in their own provinces*. Meanwhile, only a minority feel safe travelling *internationally*.
- With respect to travelling to *other provinces*, there are two distinct regional groupings: about 60% of residents in Alberta, Quebec, and Ontario would feel safe travelling to other provinces. Meanwhile, roughly 40% of residents of British Columbia, Saskatchewan/Manitoba and Atlantic Canada, would feel similarly safe.
- Atlantic Canadians' feelings of safety travelling *within their provinces* remain the highest in the country, 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



- For both Nova Scotians and Atlantic Canadians, the gap in safety sentiment between travel within one's home province and travel to other provinces is widening again, after narrowing through much of 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	74	78	66	70	69	80	82	79
Other parts of my province	60	72	63	66	69	79	82	78
Other parts of Canada	46	68	48	54	53	46	46	47
The United States	22	34	30	27	25	14	11	14
Other countries	19	28	25	22	25	12	9	15
SAMPLE SIZE	201	202	202	604	411	201	120	81

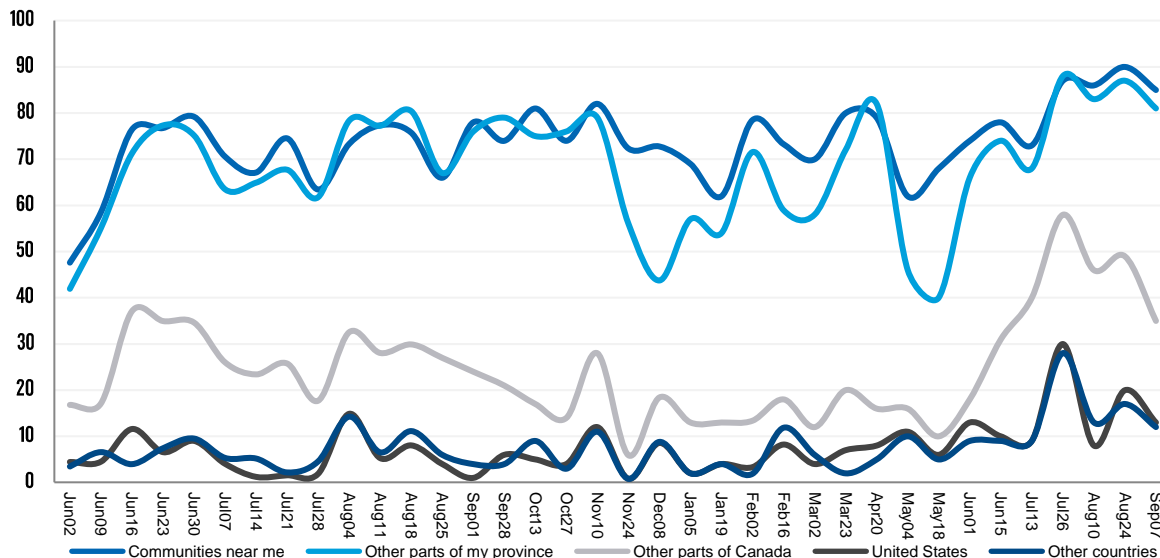
- % Somewhat / Strongly Agree
- Note: red/green text indicates a significant difference between regions.
- Results from week of September 7 2021.

Destination Canada Resident Sentiment – Welcoming Visitors

- Canadians remain generally negative about welcoming *international* visitors, with Atlantic Canadians the most negative in this regard.
- About half of Canadians from most regions are willing to welcome visitors from *other parts of the country*, with Alberta residents the most positive.
- A majority of Canadians in all regions are willing to welcome visitors from *within their own provinces*, with Atlantic Canadians the most positive in this regard.

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 welcoming sentiment extends to other Canadian visitors, 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	+23	+42	+29	+31	+40	+69	+67	+72
Other parts of my province	+7	+38	+17	+27	+40	+62	+52	+67
Other parts of Canada	-14	+31	-5	+14	+23	+17	+7	+23
The United States	-46	-10	-25	-29	-12	-35	-50	-29
Other countries	-40	-14	-32	-27	-11	-44	-51	-41
SAMPLE SIZE	208	206	204	611	420	200	116	84

- 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 September 14 2021.

Destination Canada Resident Sentiment – Promoting Home Community to Visitors

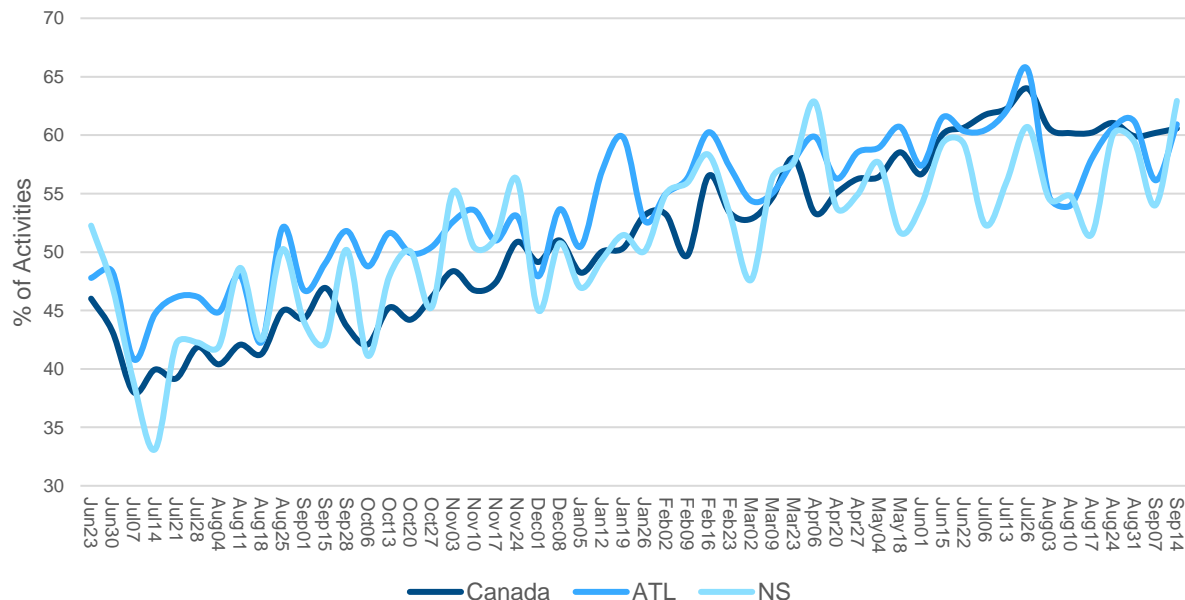
- Canadians in all regions are positive about their communities being promoted as places to visit to those in *nearby communities* and *other parts of their own province*. Atlantic Canadians are the most positive in this regard.
- There is once again increasing variability among regions with respect to having their communities advertised to *other parts of the country*: British Columbia residents are negative, Saskatchewan and Manitoba residents are neutral, while residents of all other regions (including Atlantic Canada) are positive about the idea.
- Canadians in all regions remain negative about their communities being promoted as travel destinations to *international* visitors, with residents of Alberta and Quebec being the least negative about the prospect of such advertising.

Destination Canada – Comfort With Activities, Most/Least Comfortable

Activity	Canada	Atlantic Canada	Nova Scotia
Activities most comfortable with:			
Allowing in-home renovations	81	84	85
Shopping at the mall	79	82	84
Going back to your workplace/office	78	84	88
Dining in restaurants	77	83	83
Activities least comfortable with:			
Going to bars, lounges, night clubs, pubs	45	54	63
Large gatherings such as sporting events, concerts, or festivals	44	44	48
Flying on an airplane	43	31	28
Travelling to the United States	35	17	20
SAMPLE SIZE			
	1849	200	90

- % Comfortable with each activity, among applicable
- Results from week of September 14 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 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 – at least 4 in 10 – now express comfort with *flying on an airplane, attending large public gatherings, going to bars and pubs*, and 35% would be comfortable *travelling to the United States*.
- Atlantic Canadians do not share other Canadians' increasing willingness to *fly on an airplane, or travel to the US*, but they are somewhat more comfortable than other Canadians with *going to bars*.

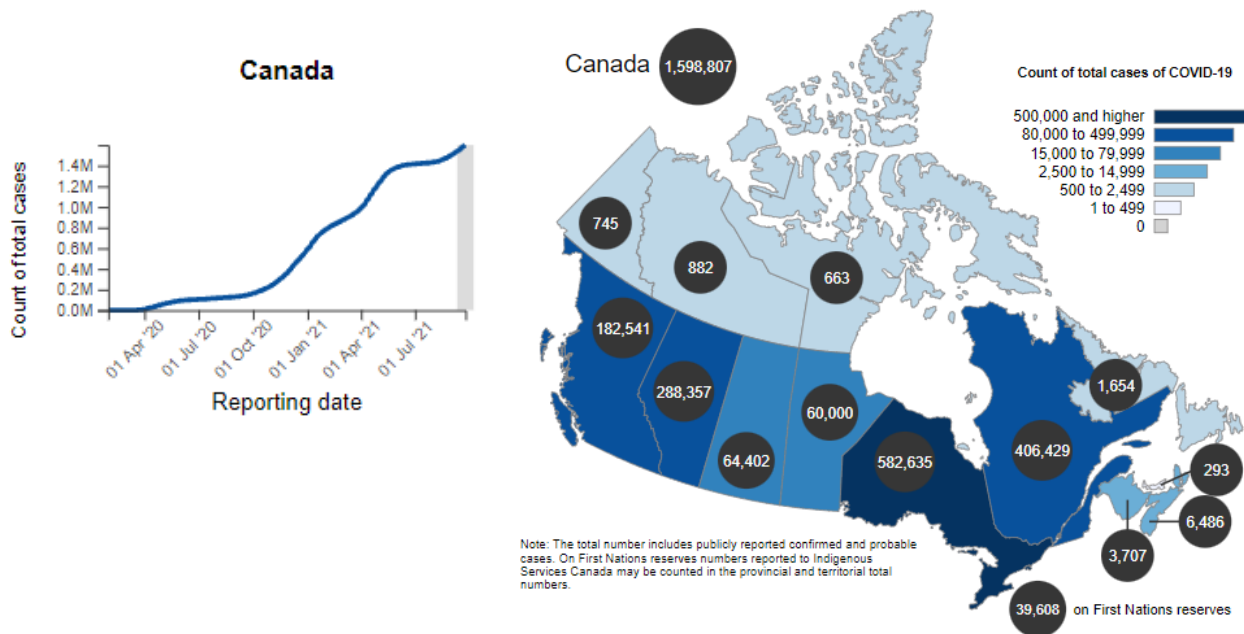
Government of Canada COVID-19 Status

As of September 24, 2021

Government of Canada – COVID-19

Count of *Total* Cases

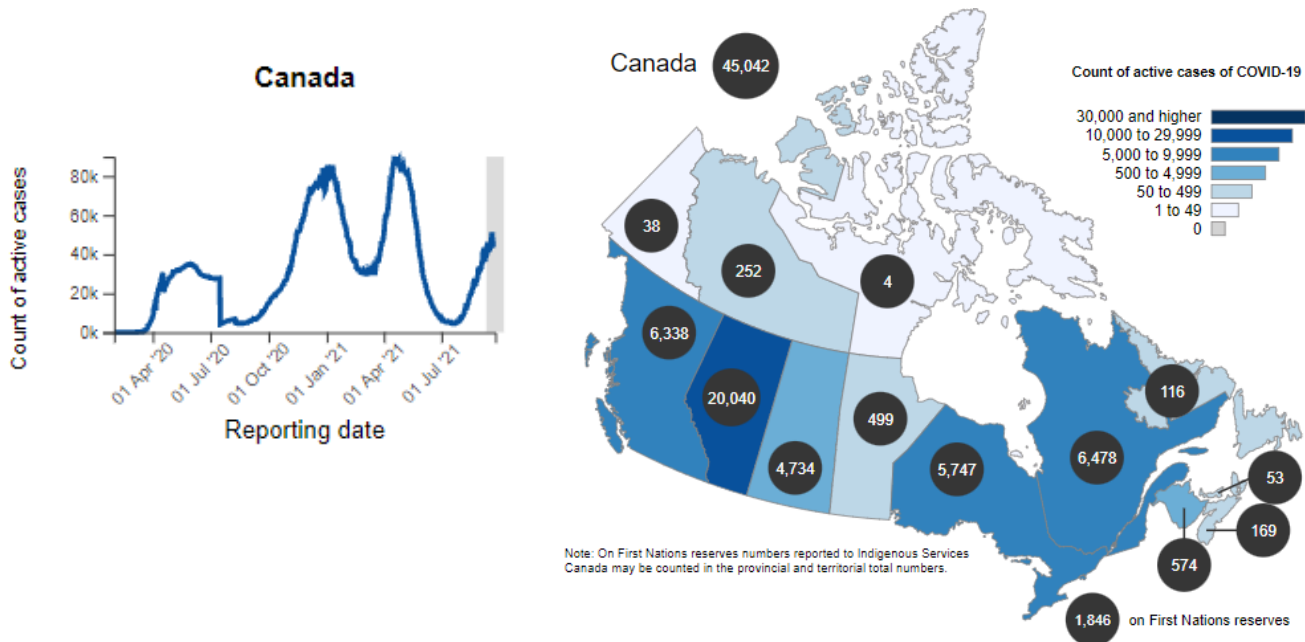
The count of total cases of COVID-19 in **Canada** was **1,598,807** as of September 24, 2021.



Government of Canada – COVID-19

Count of *Active* Cases

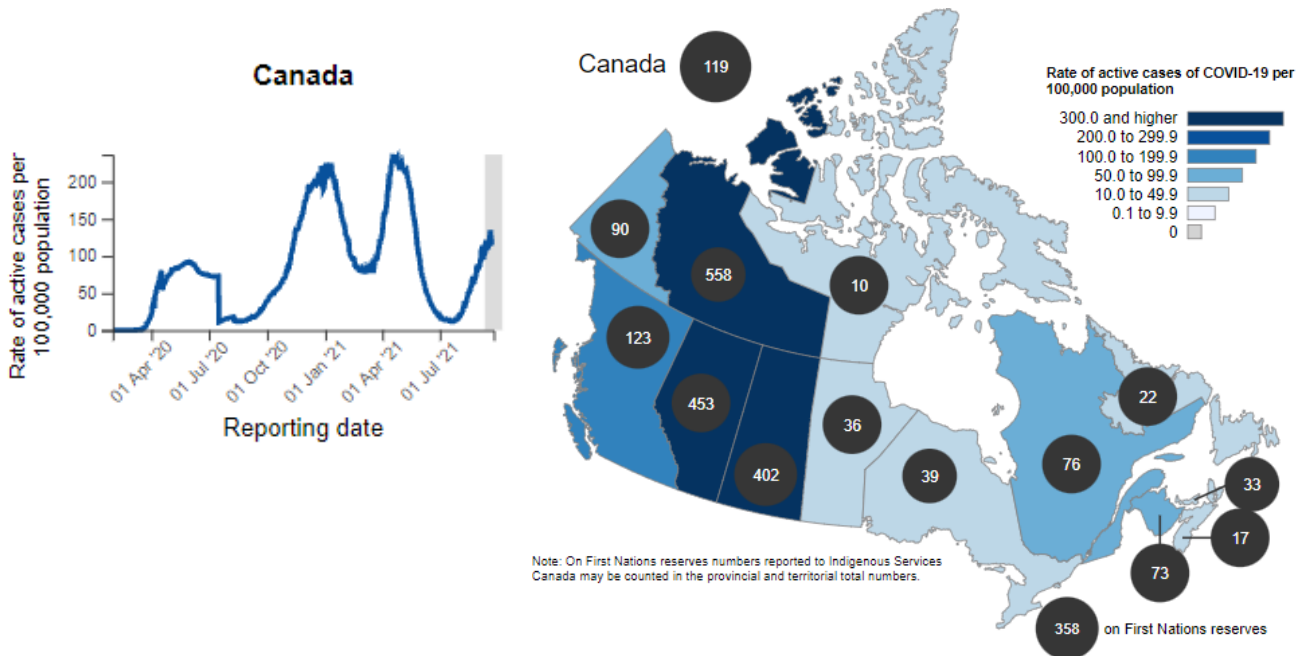
The count of active cases of COVID-19 in **Canada** was **45,042** as of September 24, 2021.



Government of Canada – COVID-19

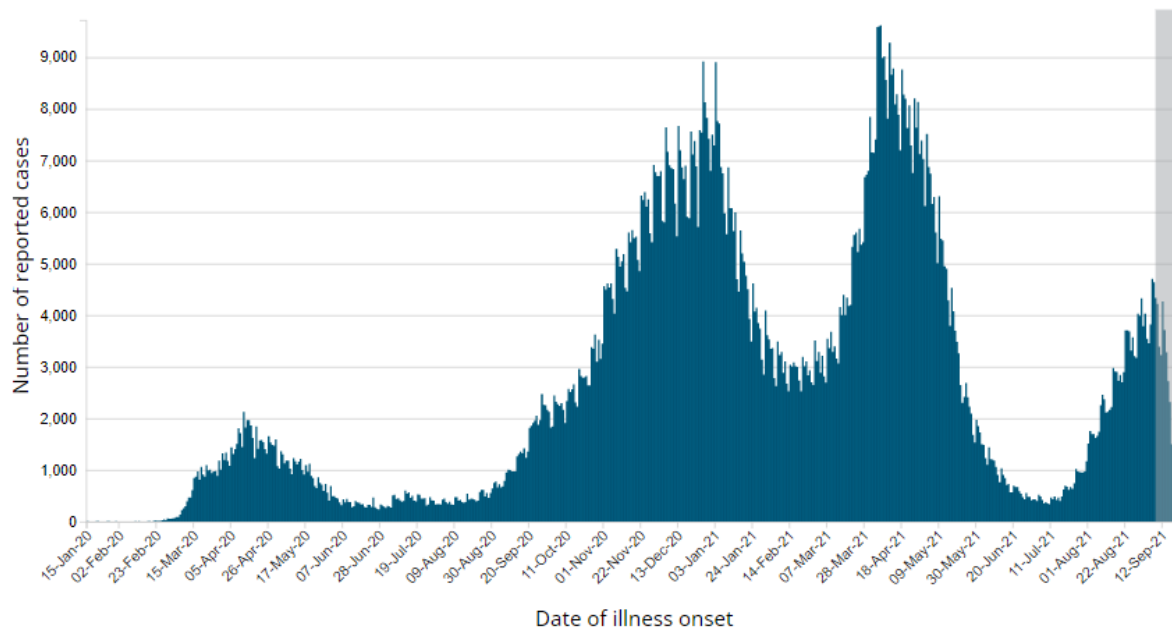
Rate of Active Cases

The rate of active cases of COVID-19 in **Canada** was **119 per 100,000 population** as of September 24, 2021.



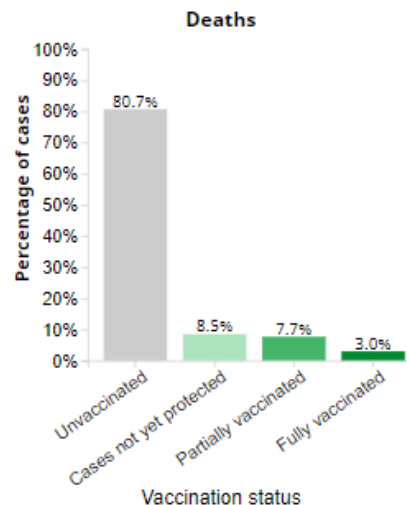
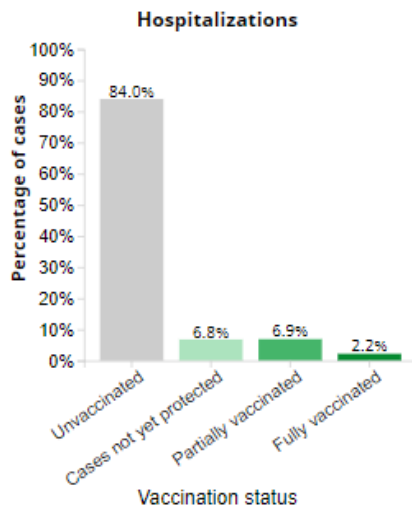
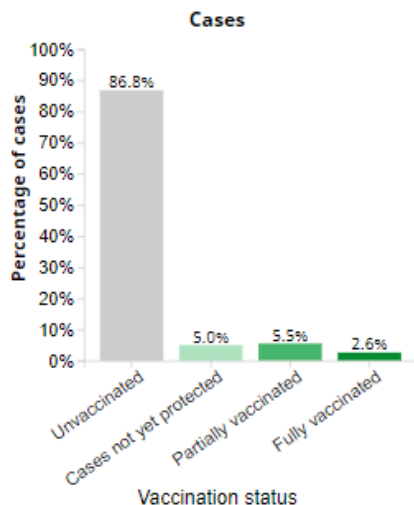
Government of Canada – COVID-19 Cases by *Date* (Epidemic Curve)

Total COVID-19 cases in Canada (n=1,586,272) by date of illness onset, as of September 24, 2021.



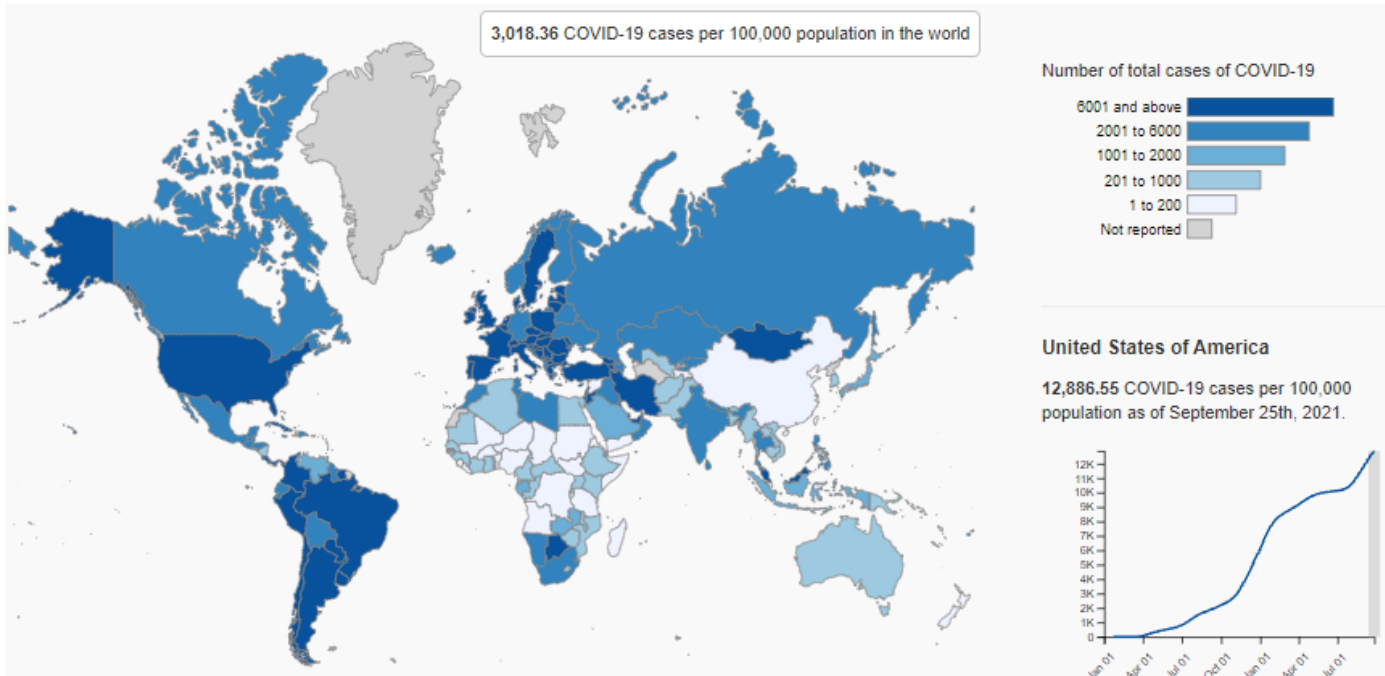
Government of Canada – COVID-19 Cases by *Vaccination Status*

Total COVID-19 cases in Canada by vaccination status, as of September 4, 2021.



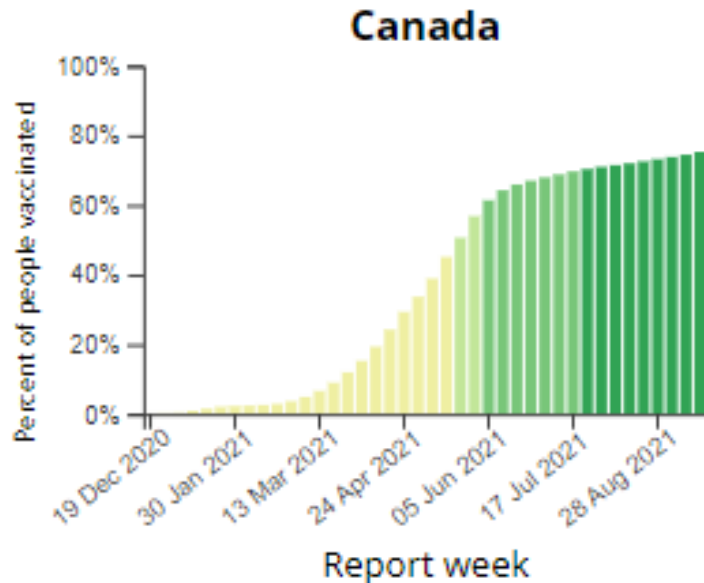
Government of Canada – COVID-19

World Cases Per 100,000 People



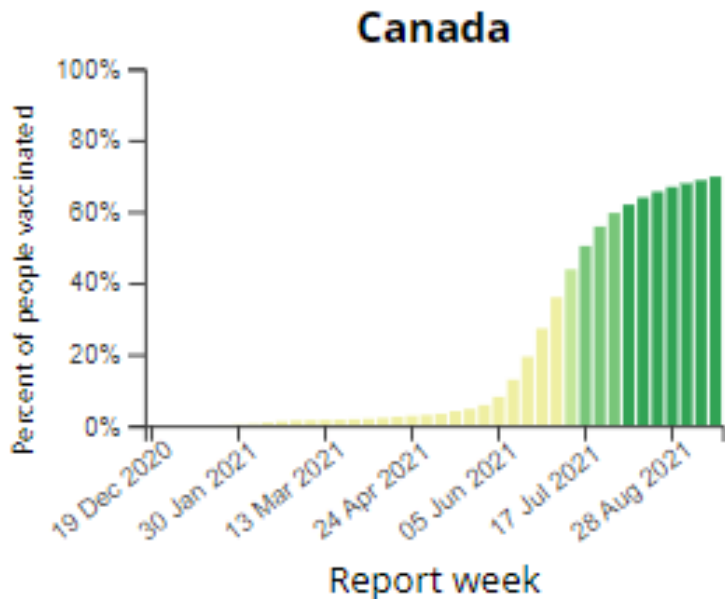
Government of Canada – Percentage With At Least 1 Vaccine Dose

The cumulative percent of the population who have received **at least one dose** of a COVID-19 vaccine in Canada was **75.25%** as of September 18, 2021.



Government of Canada – Percentage Fully Vaccinated

The cumulative percent of the population **fully vaccinated** with a COVID-19 vaccine in Canada was **69.71%** as of September 18, 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>.

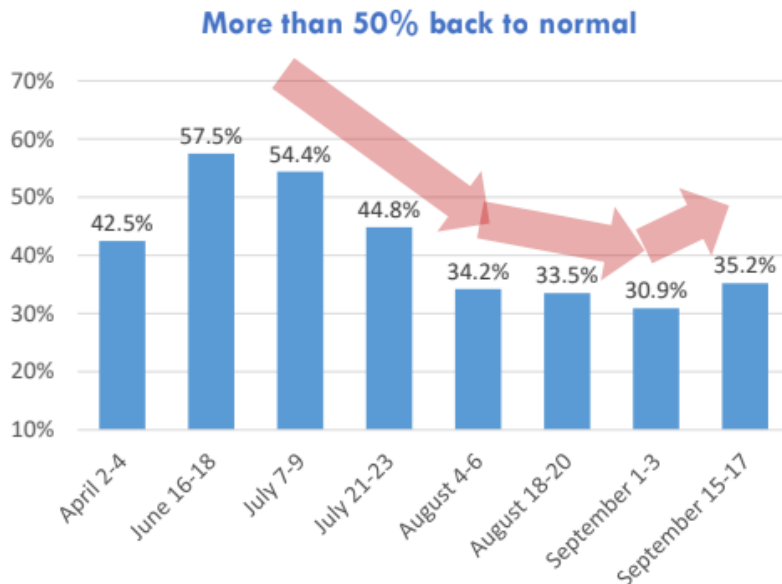
Destination Analysts American Travel Sentiment Tracker

Updated to September 21, 2021

Destination Analysts: Signs of Optimism in US About 'Return to Normal'

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)



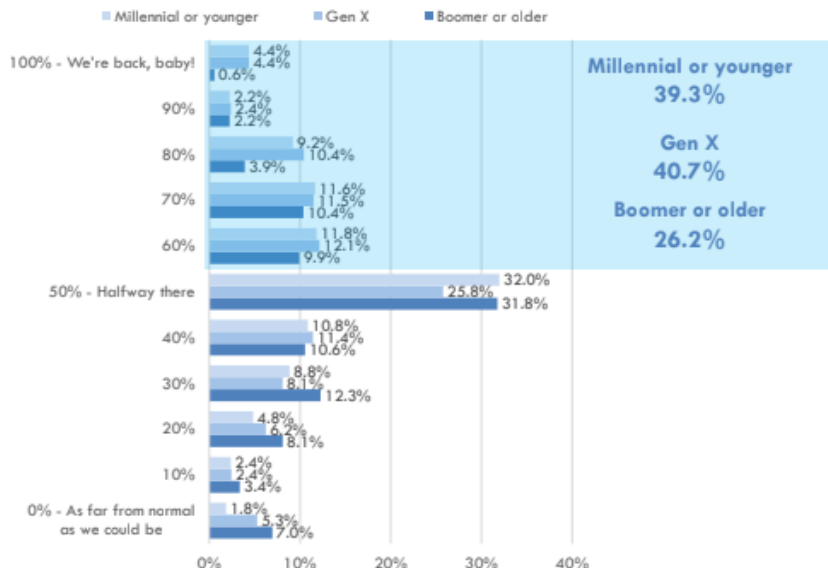
- The number of US travellers who say their country is more than half-way back to 'normal' – in terms of resuming leisure activities such as travel and dining – has declined considerably since June. However, a renewed uptick in optimism appears evident since mid-September.

Destination Analysts: Less Confidence About 'Return to Normal' Among Older Adults

Question: Overall, how close to

**"normal" is the U.S. in terms of
resuming leisure activities (dining
out, travel, etc.)?**

(Base: Wave 74 data. All respondents,
1,209 completed surveys. Data collected
September 15-17, 2021)

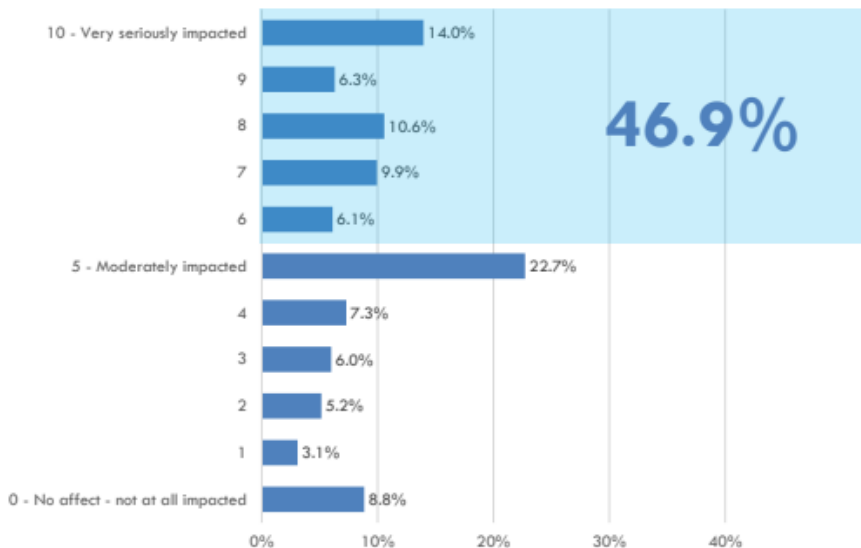


- Among US travellers, Millennials and Gen Xers (younger and middle-aged adults) are more confident that the US is close to returning to 'normal' in terms of leisure activities. Baby Boomers or older and retired adults are less confident about this.

Destination Analysts: Pandemic Still Impacting US Traveller Experiences

Question: How much is the COVID-19 issue impacting your ability to have meaningful travel experiences? (Select one)

(Base: Wave 74 data. All respondents, 1,209 completed surveys. Data collected September 15-17, 2021)

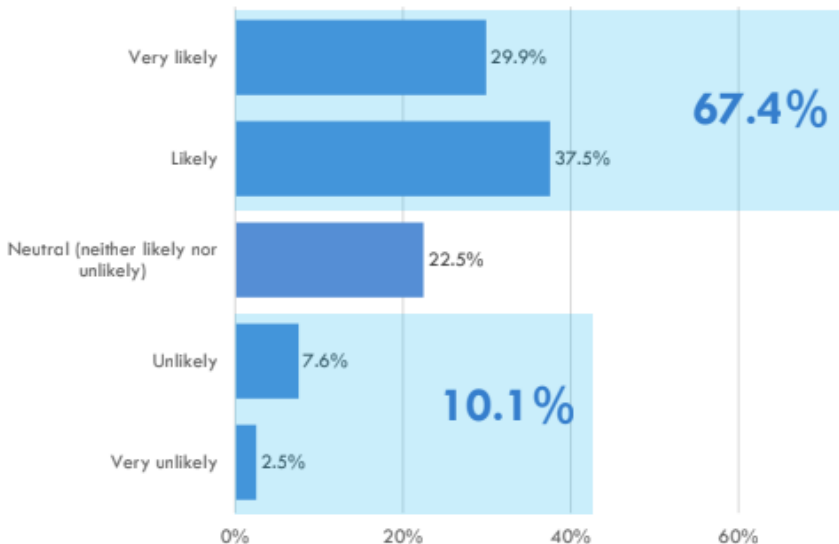


- Almost half of US travellers say the pandemic continues to significantly affect their ability to experience meaningful travel.

Destination Analysts: US Travellers See COVID-19 as Long-term Problem

Question: In your opinion, how likely is it that the COVID-19 issue will be with us for the longer-term (i.e., at least the next several years)? (Select one)

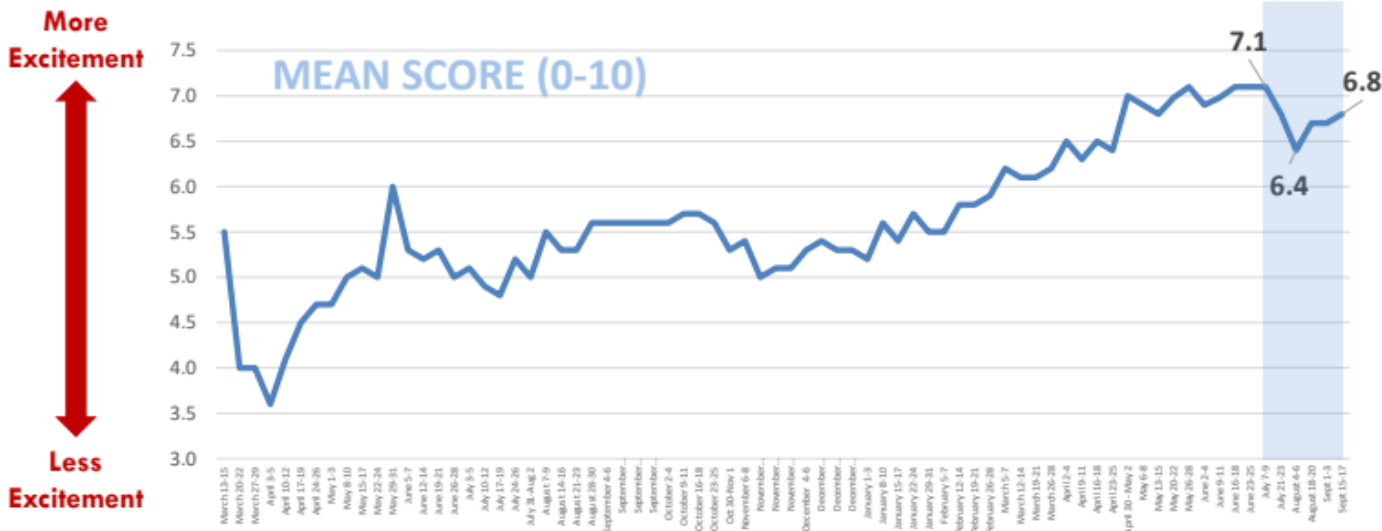
(Base: Wave 74 data. All respondents, 1,209 completed surveys. Data collected September 15-17, 2021)



- Two-thirds of US travellers believe COVID-19 is not going away soon and will remain an issue for several years.

Destination Analysts: Excitement to Travel Sentiment Recovering Since Late August

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)

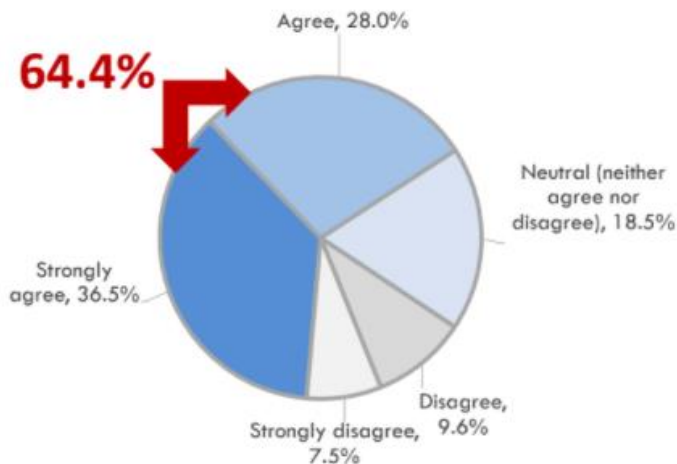


- Among US travellers, excitement to travel has been rising since late August, but remains down from its earlier mid-summer high.

Destination Analysts: Majority of US Travellers Reluctant to Travel Internationally

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.



- Almost two-thirds of US travellers say they are unlikely to travel outside the United States until the pandemic is resolved. This number has remained generally steady since the spring of 2021.

(Base: Waves 1-74. All respondents, 1,200+ completed surveys each wave.)

