

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.
- 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.

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.
- **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.
- **OAG** (www.oag.com) the Official Aviation Guide, is a United Kingdom-based global travel data provider, specializing in data for the commercial aviation industry. It provides regular updates on airline bookings, capacity, etc. via its *Recovery Tracker*.

Summary

- According to Google Destination Insights, online search demand by Canadians for travel in Canada is currently about **135% higher** than it was in November 2020. In contrast, worldwide search demand about trips to Canada is **200% higher** than it was in November last year. And in a ranking of demand for travel to Canadian cities, **Halifax dropped from 8th to 9th place** in early November.
- Statistics Canada says that trips to Canada by residents of other countries were **up 52% in September 2021** over August 2021, but were still down 80% compared with pre-pandemic levels in August of 2019.
- The federal government reports that the **number of active COVID-19 cases in Canada is generally holding steady**, with more than 23,000 cases as of November 25, 2021. Nationally, the **rate of active cases is also steady**, with 60 cases per 100,000 people as of November 25.
- The latest Destination Canada Travel Recovery Assessment says **all provinces and territories remained in the *Inter-provincial* phase** of recovery in early November, with residents in all parts of the country booking trips across provincial and territorial boundaries.

Summary

- Comfort with most travel-related activities is **increasing among Canadians, including those activities at the bottom of the comfort scale**: more than half of Canadians (53%) now say they're comfortable with the idea of flying on an airplane, and close to half (47%) say they're comfortable with travelling to the United States. Nova Scotia sentiment is well behind the national opinion, with only 38% and 29% expressing comfort with each of these respective activities.
- Destination Analysts data shows **increasing confidence about travel among Americans**, with rising numbers ready to welcome visitors to their communities, a growing interest in international travel and decreasing fears around travel safety
- International airline data from OAG shows that global seat capacity is projected to **rise in December to the highest number of scheduled seats of any month in 2021**. Such capacity, however, would still be lower than the pre-pandemic levels seen in December 2019.

Google Destination Insights

As of November 16, 2021

Google Destination Insights: Online *Domestic* Travel Interest in Canada

- The graphs show Google searches by **Canadians** for flights and accommodations for **trips in Canada**. Demand is scored by search volume on an index of 0-100, with 100 being the highest indexed volume over the period measured.

30-day domestic travel demand Oct. 16 to Nov. 16, 2021



12-month domestic travel demand Nov. 16, 2020 to Nov. 16, 2021



Google Destination Insights: Online *International* Travel Interest in Canada

- The graphs show Google searches **worldwide** for flights and accommodation for **trips to Canada**. Demand is scored by search volume on an index of 0-100, with 100 being the highest indexed volume over the period measured.

30-day international demand, Oct. 16 to Nov. 16, 2021



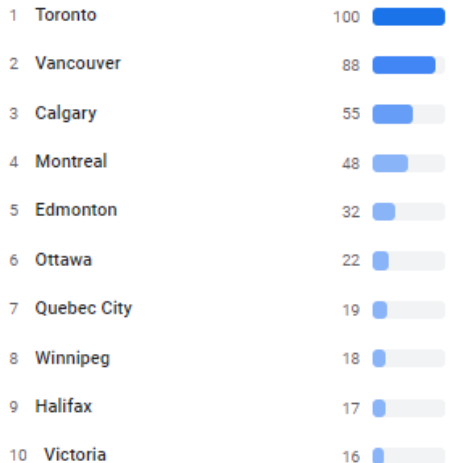
12-month international demand, Nov 16, 2020 to Nov. 16, 2021



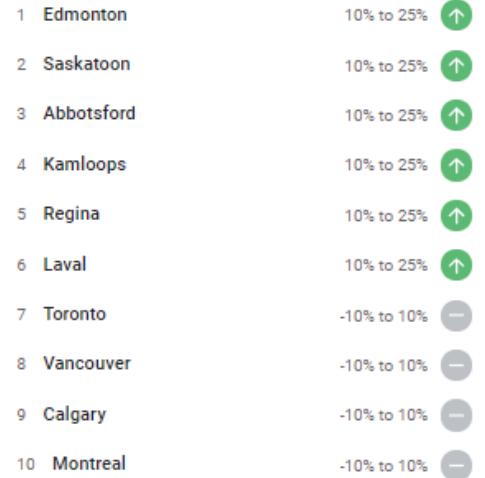
Google Destination Insights: 30-Day Domestic Demand by Destination City

- Cities are scored on an index of 0-100, based on domestic Google search demand by Canadians between **Oct. 16 to Nov. 16, 2021** for flights to and accommodations in Canadian cities. 100 is the highest indexed volume over the period.
- Growth is the *% change* in domestic Google travel search demand in the period **Oct. 16 to Nov. 16, 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, **Oct. 16 to Nov. 16, 2021**. Countries are scored by search volume, on an index of 0-100, with 100 being the highest indexed volume over the period.

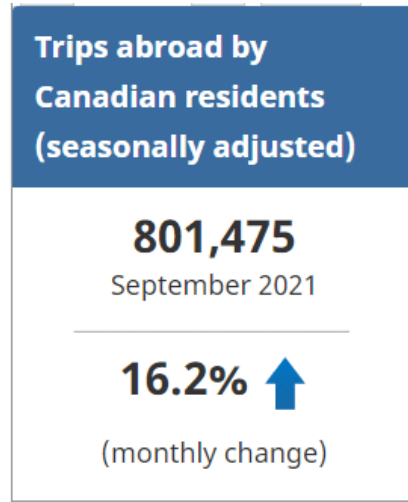
TOP DEMAND BY ORIGIN COUNTRY



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

Released November 22, 2021

Statistics Canada: September Travel Between Canada and Other Countries



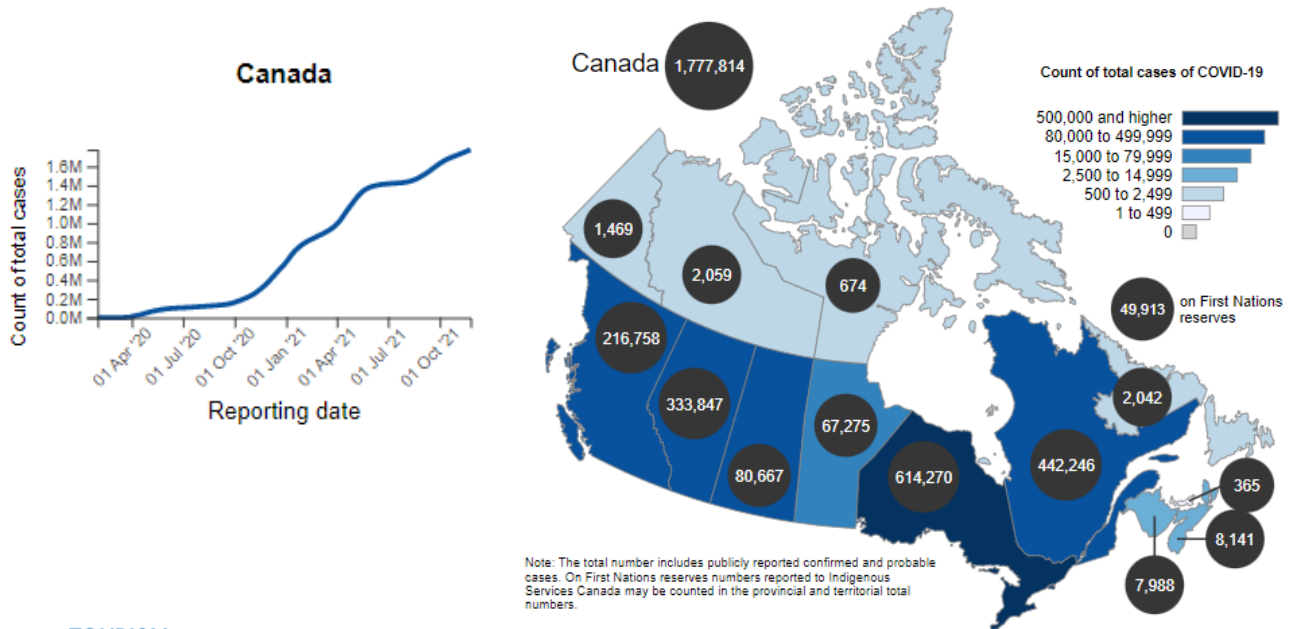
- Trips to Canada by travellers from other countries were **up 52%** in September over the previous month, and were up 458% from September 2020, but were down 80% from pre-pandemic levels in September 2019.
- Trips to other countries by Canadians were **up 16%** in September over the previous month, and were up 138% from September 2020, but were down 83% from pre-pandemic levels in September 2019.

Government of Canada COVID-19 Status

As of November 25, 2021

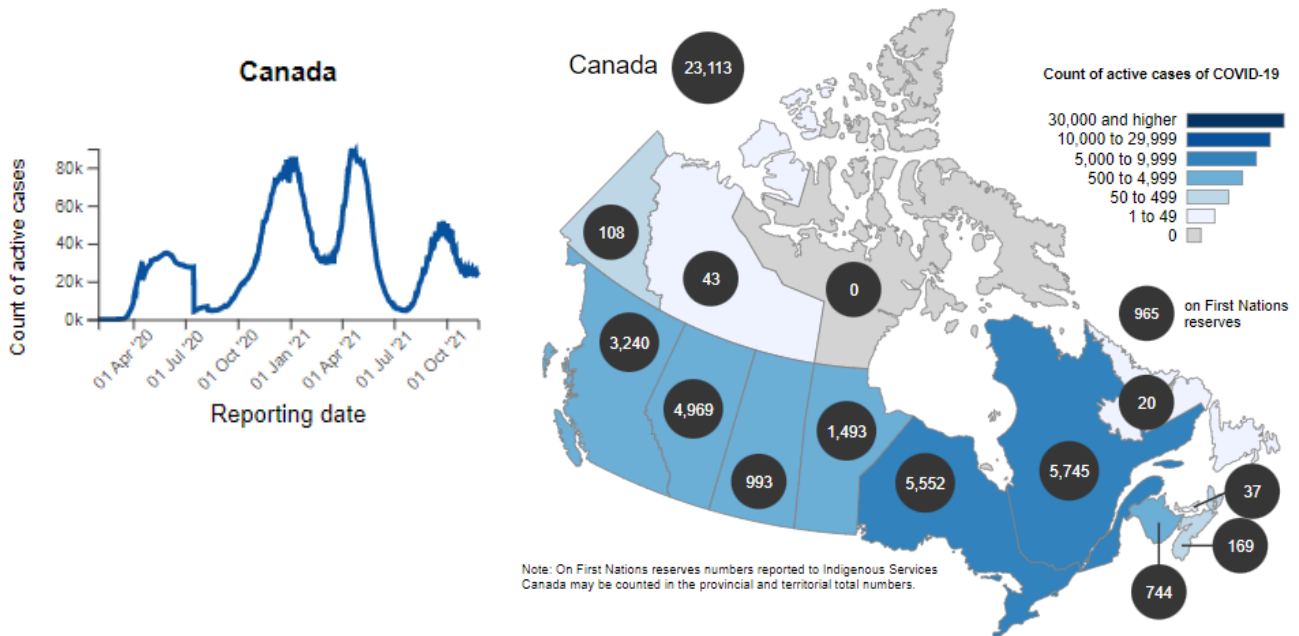
Government of Canada – COVID-19 Count of *Total* Cases

- The count of total cases of COVID-19 in **Canada** was **1,777,814** as of November 25, 2021.



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

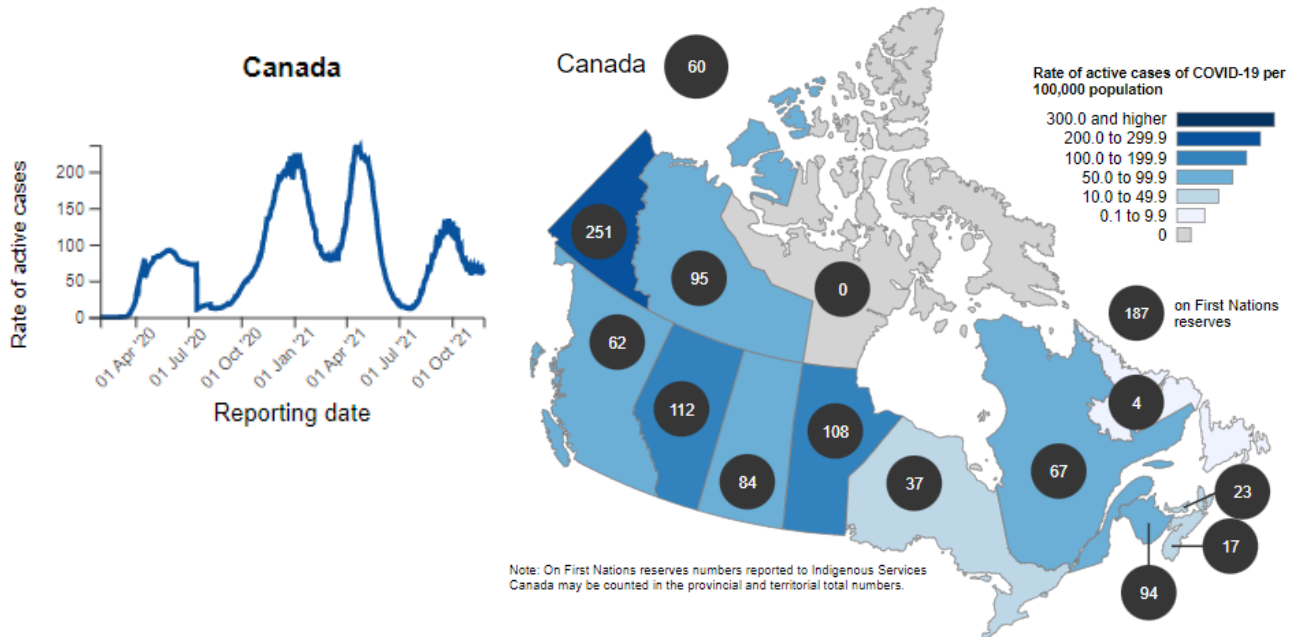
- The count of active cases of COVID-19 in **Canada** was **23,113** as of November 25, 2021.



Government of Canada – COVID-19

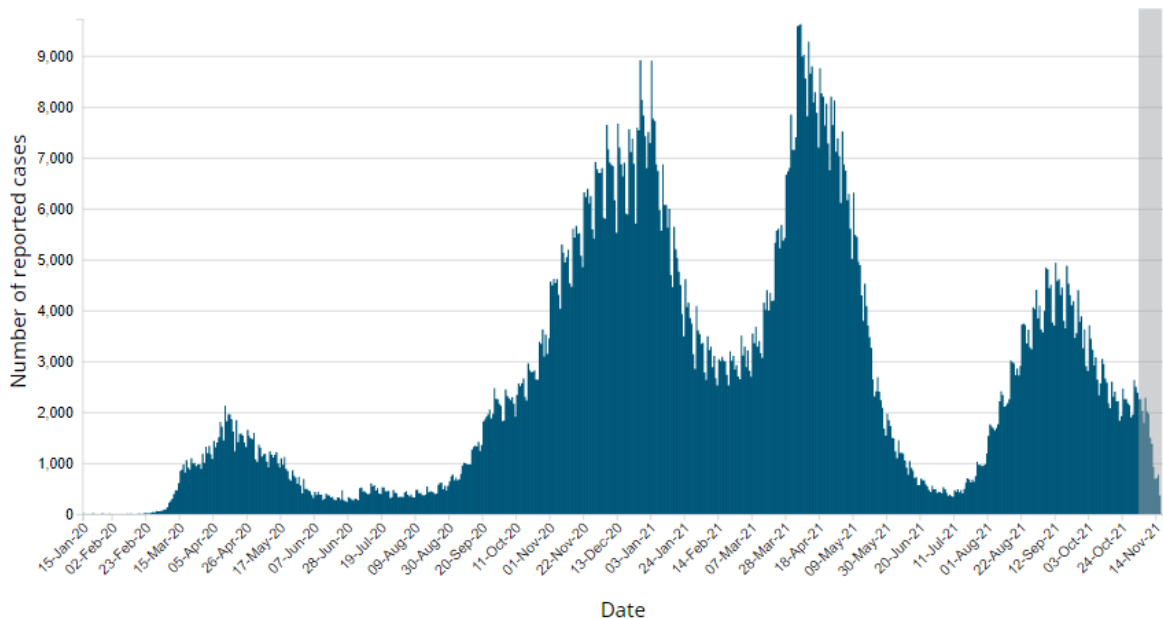
Rate of Active Cases

- The rate of active cases of COVID-19 in **Canada** was **60 per 100,000 population** as of November 25, 2021.



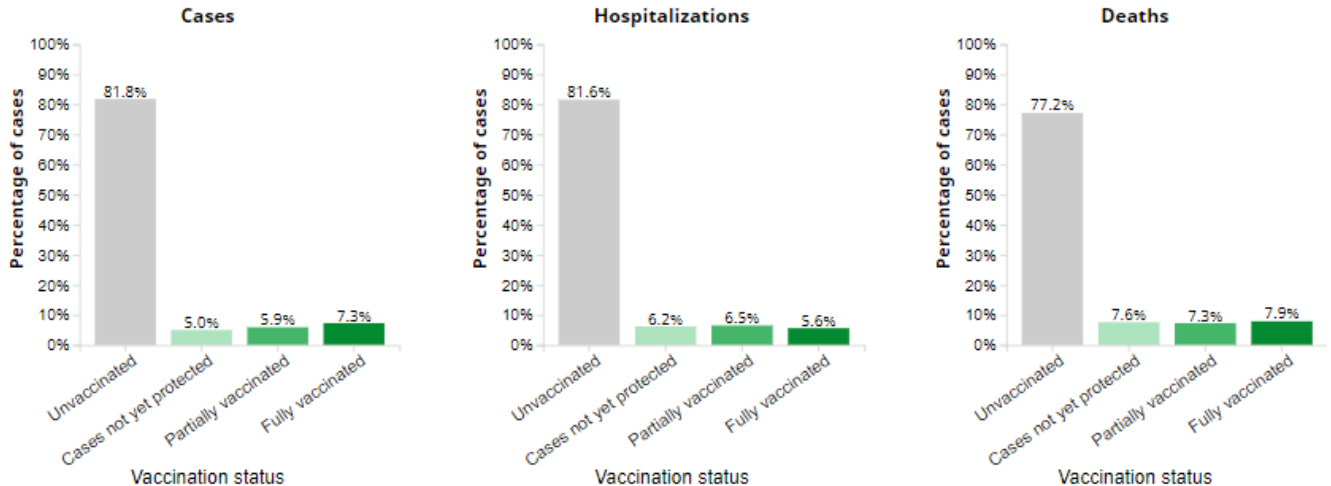
Government of Canada – COVID-19 Cases by *Date* (Epidemic Curve)

- Total COVID-19 cases in Canada (n=1,750,490) by date of illness onset, as of November 19, 2021.

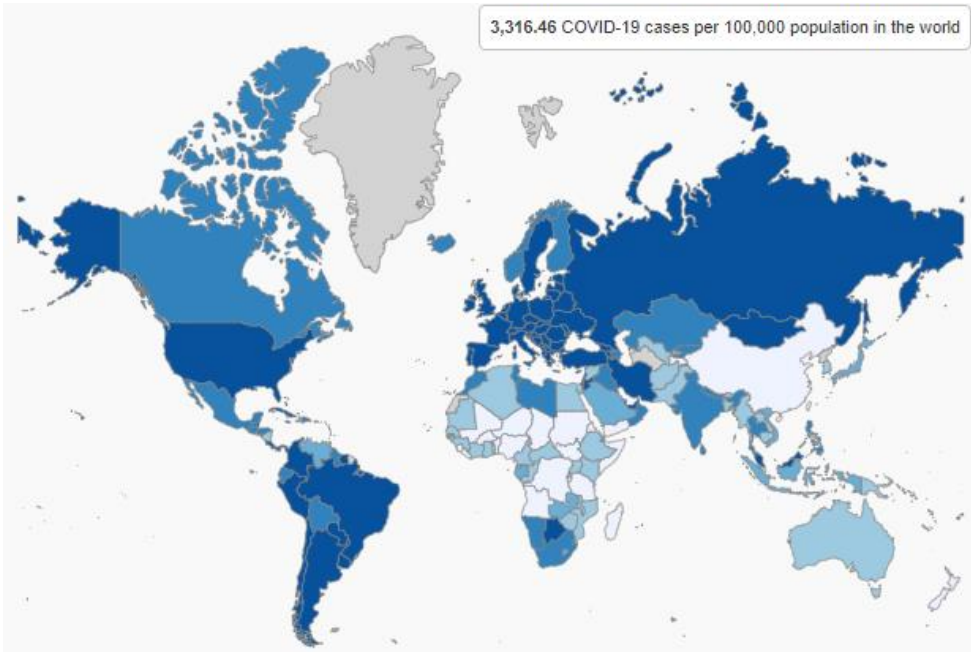


Government of Canada – COVID-19 Cases by *Vaccination Status*

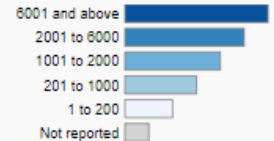
- Total COVID-19 cases in Canada by vaccination status, as of October 30, 2021.



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

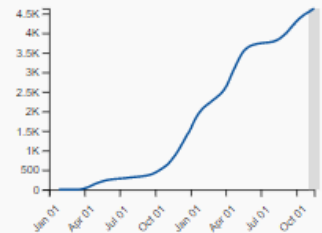


Number of cases per 100,000 population of COVID-19



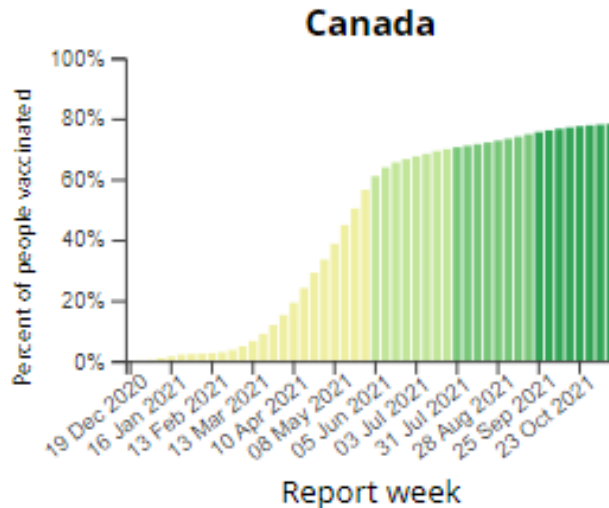
Canada

4,630.25 COVID-19 cases per 100,000 population as of November 16th, 2021.



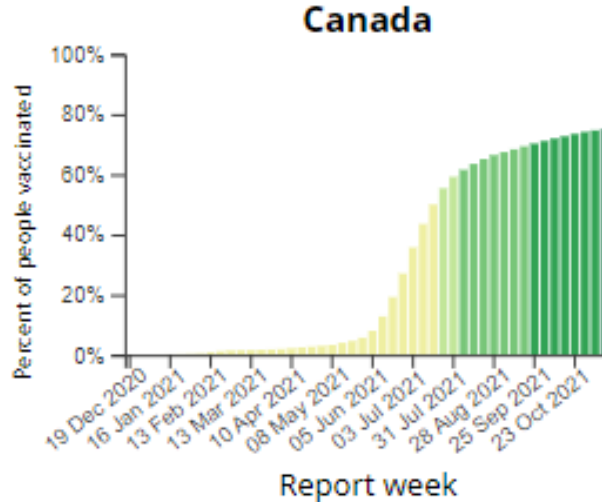
Government of Canada – Percentage With At Least 1 Vaccine Dose

- The cumulative percent of the population who have received **at least one dose** of a COVID-19 vaccine in Canada was **78.2%** as of November 13, 2021.



Government of Canada – Percentage Fully Vaccinated

- The cumulative percent of the population **fully vaccinated** with a COVID-19 vaccine in Canada was **75.04%** as of November 13, 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 dashboard at: <https://novascotia.ca/coronavirus/data/#dashboard>

Destination Canada: Travel Recovery Assessment

Updated to November 9, 2021

Destination Canada Provincial Travel Recovery Assessment

Timeline of overall assessment for each province and territory:

	06-Jul	13-Jul	20-Jul	27-Jul	03-Aug	10-Aug	17-Aug	24-Aug	31-Aug	07-Sep	14-Sep	21-Sep	28-Sep	05-Oct	12-Oct	19-Oct	26-Oct	02-Nov	09-Nov
British Columbia	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV
Alberta	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV
Saskatchewan	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV
Manitoba	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV
Ontario	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV
Quebec	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV
New Brunswick	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV
Nova Scotia	III	III	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV
Prince Edward Island	III	III	III	III	III	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV
Newfoundland & Labrador	III	III	III	III	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV
Yukon	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV
Northwest Territories	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV
Nunavut	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	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 **November 9, 2021**:

- 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 data to week of November 15, 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	86	90	80	86	83	94	96	93
Communities in my province	78	86	75	80	84	86	89	82
Other provinces in Canada	63	78	59	63	66	48	49	47
The United States	30	42	41	34	39	20	18	21
Other countries	33	31	37	31	32	22	18	23
SAMPLE SIZE	201	201	200	609	408	200	122	74

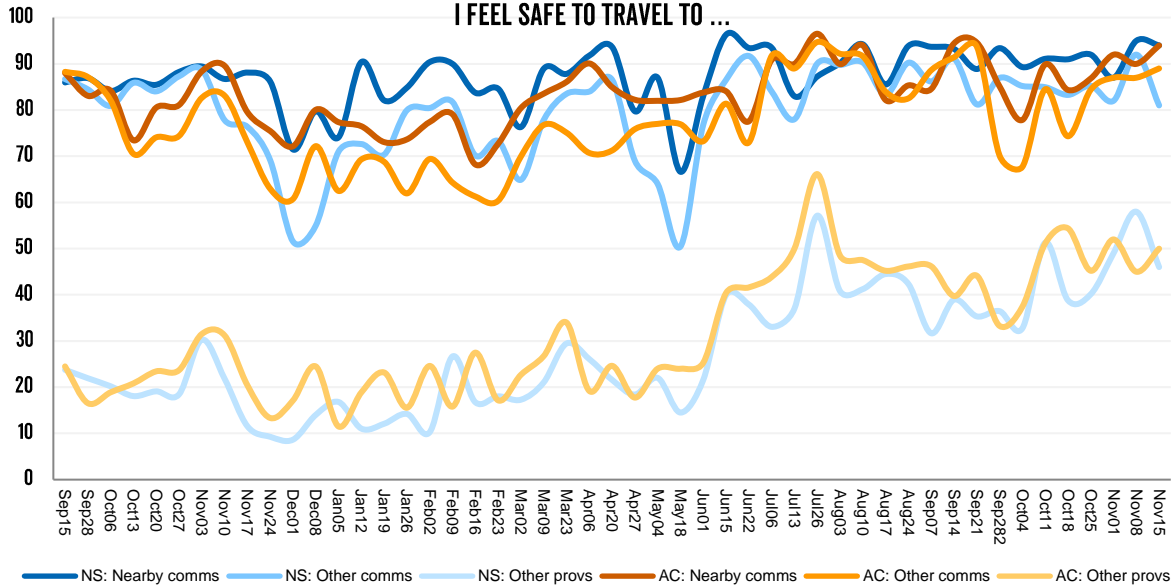
- % Somewhat / Strongly Agree.
- Note: red/green text indicates a significant difference between regions.
- Results from week of November 15, 2021.

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*. And a growing minority feel safe travelling *internationally*.
- A majority of Canadians in all regions, except those in Atlantic Canada (48%), feel safe travelling to other provinces.
- Atlantic Canadians' feelings of safety travelling *within their provinces* are among the highest in the country, while their comfort levels with travel *elsewhere* are 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 narrowing since early 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
Communities near me	75	78	69	74	76	88	89	86
Communities in my province	67	77	67	71	79	82	80	81
Other provinces in Canada	59	68	57	61	72	56	53	55
The United States	34	35	43	33	44	29	22	30
Other countries	34	27	40	32	39	28	16	33
SAMPLE SIZE	201	201	200	609	408	200	122	74

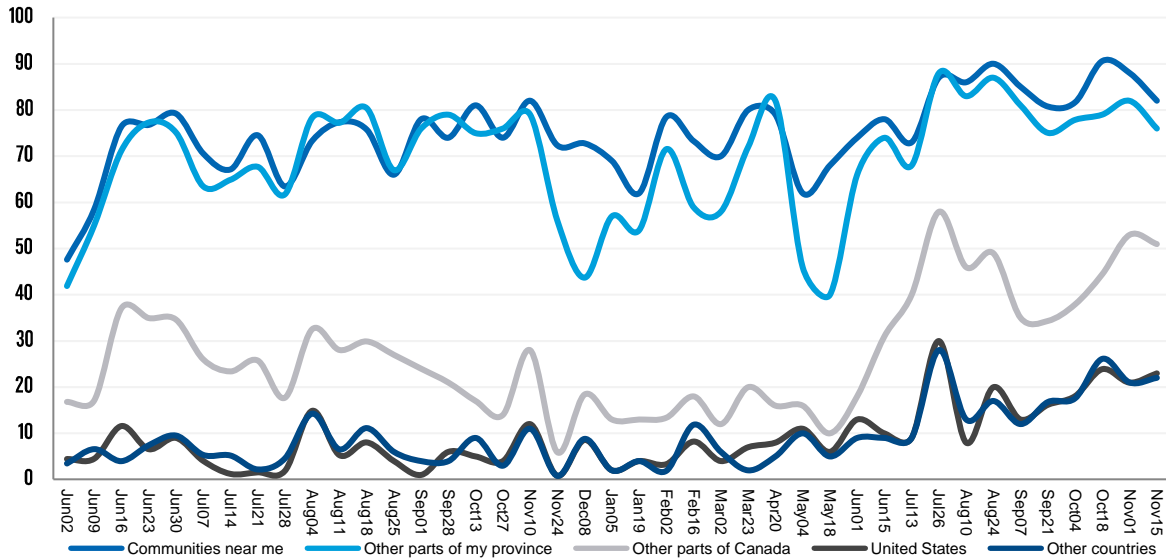
- % Somewhat / Strongly Agree.
- Note: red/green text indicates a significant difference between regions.
- Results from week of November 15, 2021.

Destination Canada Resident Sentiment – Welcoming Visitors

- A large majority of Canadians in all regions are willing to welcome visitors from *within their own province*.
- Roughly 60%-70% of Canadians in most regions are willing to welcome visitors from *other parts of the country*.
- Canadians remain generally negative about welcoming *international* visitors, with Atlantic Canadians among the most negative 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*, while few would welcome *international* visitors. Positive sentiment in welcoming visitors from *other parts of Canada*, which dipped in late summer, has not yet returned to its July highs.

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
Communities near me	+38	+60	+23	+38	+47	+60	+61	+58
Communities in my province	+24	+54	+19	+37	+48	+62	+54	+66
Other provinces in Canada	+6	+47	+3	+27	+35	+22	+15	+26
The United States	-22	+13	-23	-9	+4	-25	-33	-23
Other countries	-16	+11	-22	-10	+2	-30	-39	-25
SAMPLE SIZE	215	205	213	612	418	202	123	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 November 8, 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 from *nearby communities* and *other parts of their own province*. Atlantic Canadians are the most positive in this regard.
- Residents of British Columbia and Saskatchewan/Manitoba are neutral when it comes to having their communities advertised to visitors from *other parts of the country*. Atlantic Canada and Ontario residents are somewhat positive about the idea, while residents of Quebec and Alberta are quite positive.
- There is increasing variability among regions when it comes to having their communities advertised to *international* visitors: residents from Alberta are now positive, Quebec residents are neutral, Ontario residents are just slightly negative, while the idea remains unpopular in British Columbia, Saskatchewan/Manitoba and Atlantic Canada.

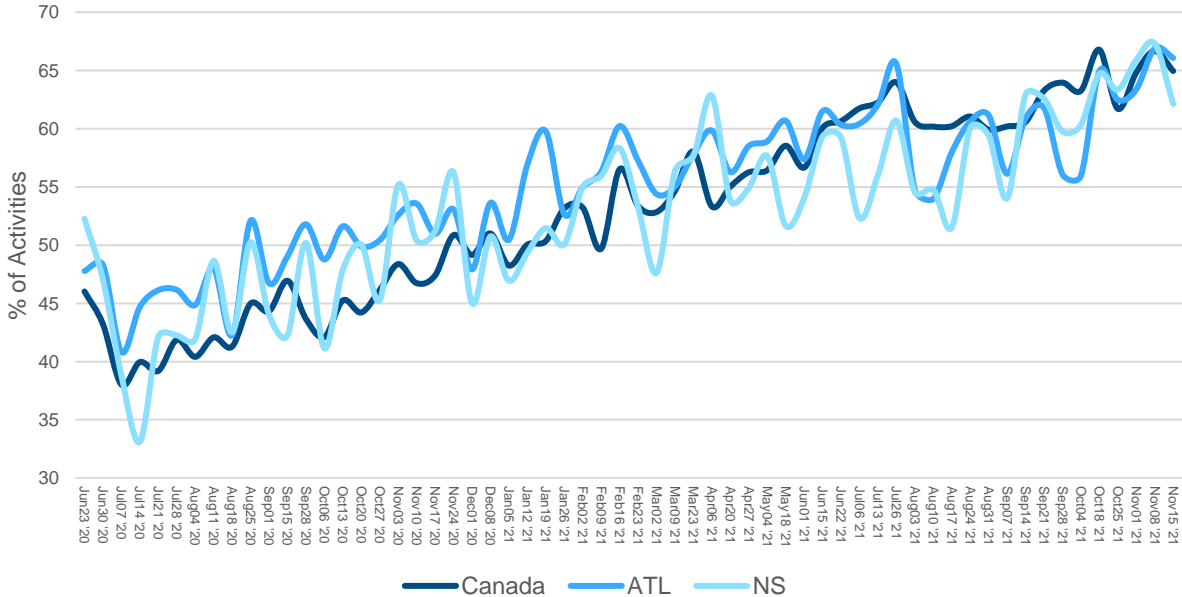
Destination Canada – Comfort With Activities, Most/Least Comfortable

- ‘Once governments lift the protective measures put in place to fight COVID-19, which of the following would you be comfortable doing ...’

Activity	Canada	Atlantic Canada	Nova Scotia
Activities most comfortable with:			
Allowing in-home renovations	85	87	88
Shopping at the mall	85	85	82
Going back to your workplace/office	80	89	78
Dining in restaurants	80	85	79
Activities least comfortable with:			
Flying on an airplane	53	49	38
Going to bars, lounges, night clubs, pubs	49	59	48
Large gatherings such as sporting events, concerts, or festivals	47	48	43
Travelling to the United States	47	36	29
SAMPLE SIZE			
	1819	200	99

- % Comfortable with each activity, among applicable.
- Results from week of November 15, 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

- 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, about half now express comfort with *flying on an airplane*, *going to bars and pubs*, and *attending large public gatherings*. The least popular activity among Canadians is *travelling to the United States*, with a low of 47% saying they are comfortable doing this.
- Atlantic Canadians are less comfortable than other Canadians with *flying on an airplane*. And Atlantic Canadians do not share other Canadians' increasing willingness to *travel to the United States*.

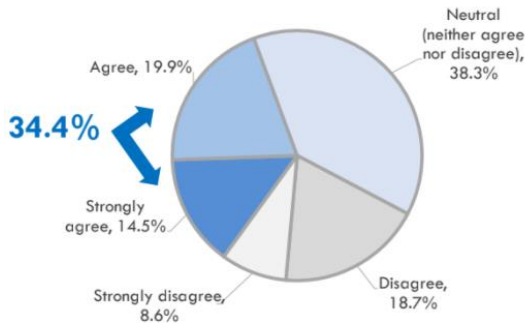
Destination Analysts American Travel Sentiment Tracker

Updated to November 16, 2021

Destination Analysts: Americans More Willing to Welcome Visitors to Communities

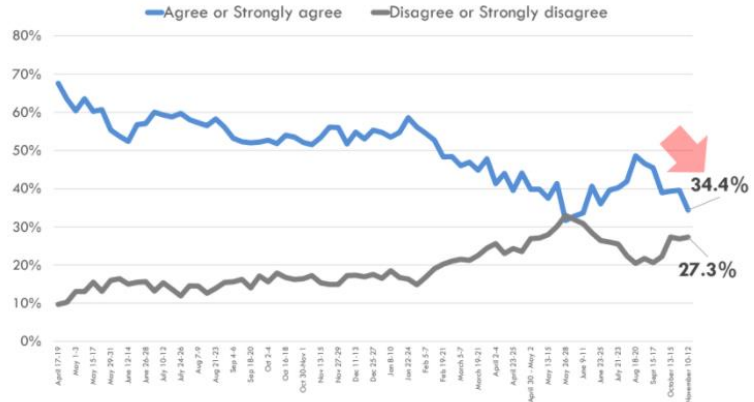
How much do you agree with the following statement?

Statement: I do not want travelers coming to visit my community right now.



(Base: Waves 6-78. All respondents, 1,200+ completed surveys each wave.)

Historical data



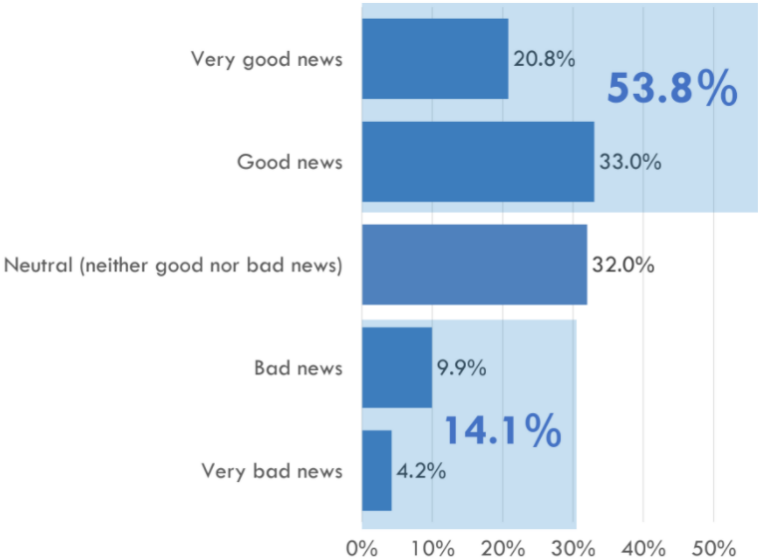
- American resident sentiment *against* welcoming visitors to local communities is improving. Currently, about one-third of Americans surveyed don't want tourists in their communities, down from about one-half in August.

Destination Analysts: Slight Majority Supports Lifting of US Border Restrictions

Question: How do you feel about this change? (Select the one that best completes the sentence)

In my opinion, lifting international travel restrictions at this point in time is _____.

(Base: Wave 78 data. All respondents, 1,208 completed surveys. Data collected November 10-12, 2021)

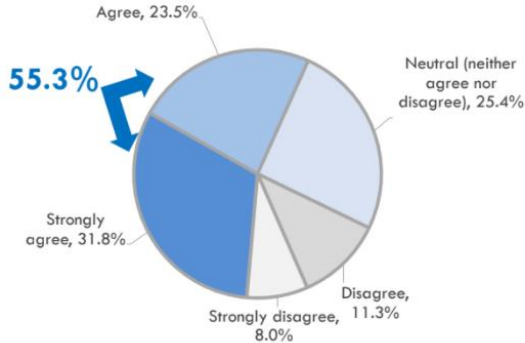


- A slim majority of Americans surveyed supports the recent lifting of US restrictions against international visitors, and also supports the requirement for visitors to show proof of full vaccination.

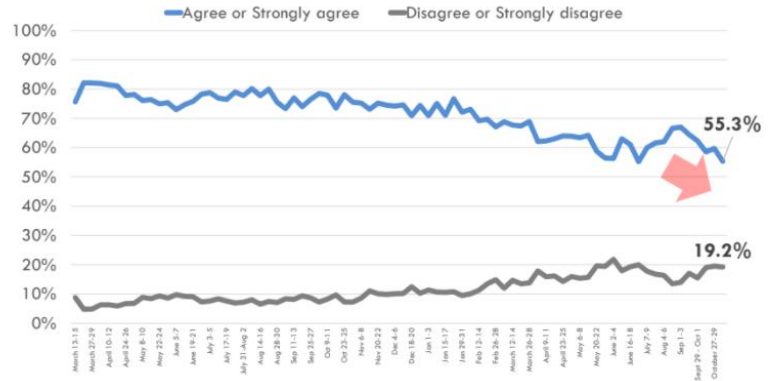
Destination Analysts: Caution Over International Trips Easing Among Americans

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.



Historical data

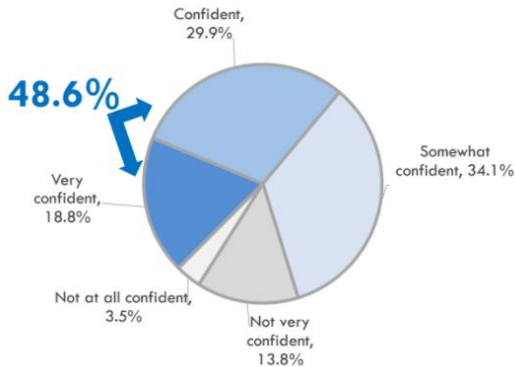


(Base: Waves 1-78 All respondents, 1,200+ completed surveys each wave.)

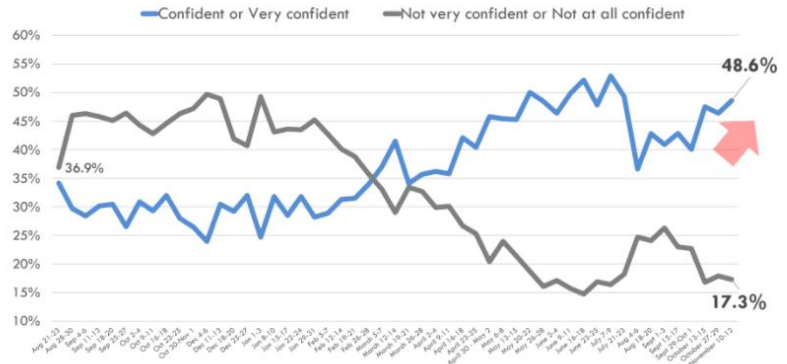
- More than one-half of US travellers say they're unlikely to travel internationally until the pandemic is over, but that number has declined from nearly 70% in late summer.

Destination Analysts: Half of US Travellers Believe They Can Now Travel Safely

Question: How confident are you that you can travel safely in the current environment?



Historical data

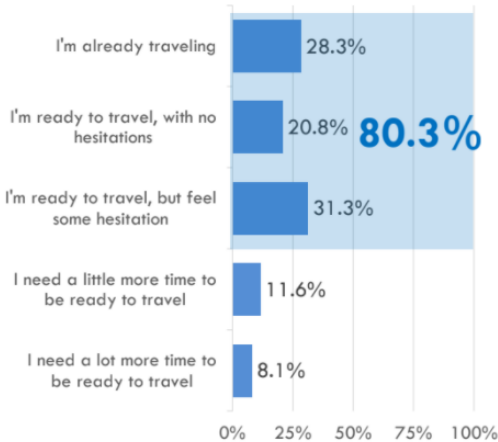


(Base: Wave 24-34 and 39-78 data. All respondents, 1,200+ completed surveys each wave.)

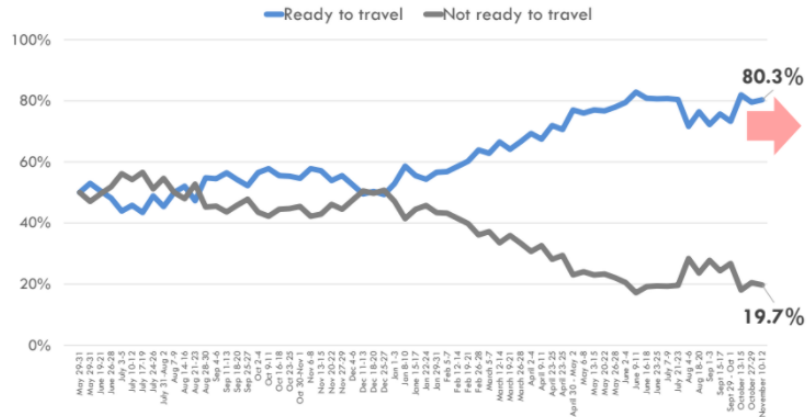
- Almost half of US travellers are confident they can travel safely in the 'current environment,' up from only one-third of travellers who expressed such confidence in August.

Destination Analysts: 80% of US Travellers Ready to Travel Again

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



Historical data



(Base: Waves 12-13 and 15-78. All respondents, 1,200+ completed surveys each wave.)

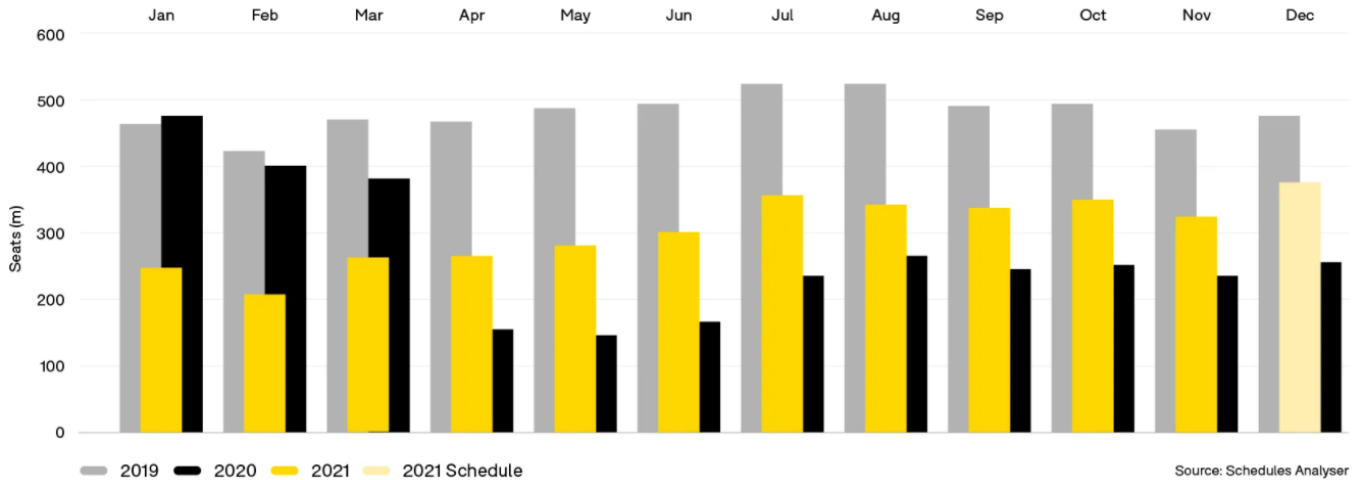
- A large majority of US travellers (80%) say they're already travelling or ready to travel again, a number that has recovered since the dip in travel readiness through the summer.

Official Aviation Guide (OAG) Recovery Tracker

Updated to Week of November 8, 2021

OAG – Global Airline Seat Capacity Projected to Rise in December

Global Scheduled Airline Seat Capacity, Year-Over-Year Comparison



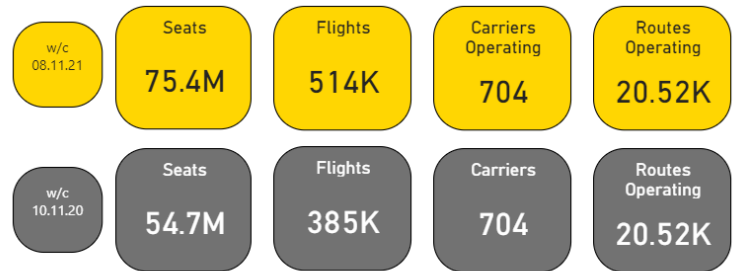
- Airline seat capacity, which has slipped in November, is projected to rise in December to the highest number of scheduled seats of any month in 2021. However, it will remain below the level of December 2019.

OAG – Mid-November Airline Seat Count 40% Higher Than One Year Ago

Global Airline *Frequency* and *Capacity*, Week of November 8, 2021 vs Same Week in 2020

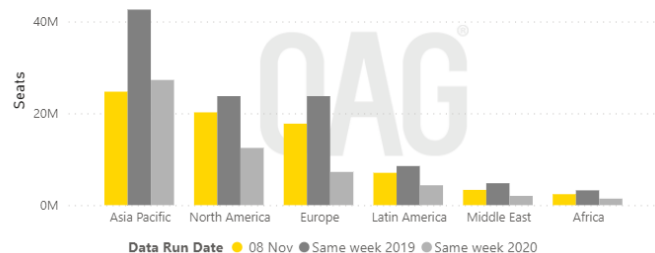
- The number of scheduled airline seats in the second week of November 2021 is up almost 40% from the number of seats on the same week in 2020.

Global Frequency and Capacity for the current week
Week 46 - Week beginning 08 November 2021



Global Airline Seat *Capacity By Region*, Week of November 8, 2021 vs Same Weeks in 2019 and 2020

Seat Capacity by Region - Current Week

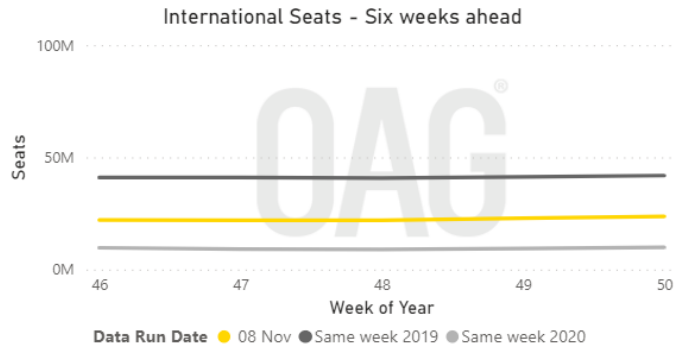
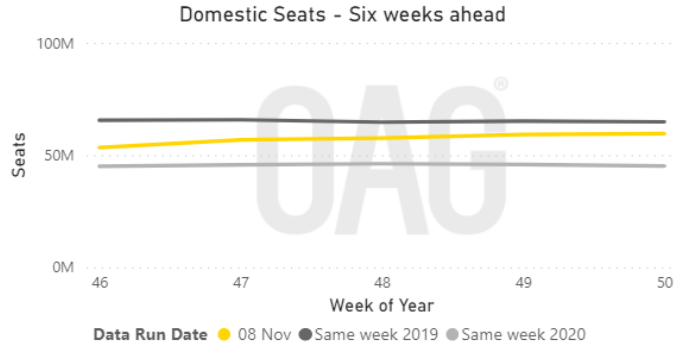


OAG – Growth in Domestic Seat Capacity to Outpace International Growth

Global Airline *Domestic* Seat Capacity, Week of November 8, 2021 (Plus Six Weeks Forward) vs Same Period in Past Two Years →

- While Domestic seat capacity is projected to rise and come close to reaching 2019 levels by mid-December of 2021, International capacity is unlikely to make similar gains.

Global Airline *International* Seat Capacity, Week of November 8, 2021 (Plus Six Weeks Forward) vs Same Period in Past Two Years →



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