

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 Index* 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

- Between mid December and mid January, **Halifax remained in 10th place**, behind Quebec City and Kelowna, BC, in a ranking of online search demand for travel to Canadian cities, according to Google Destination Insights.
- Statistics Canada's **final counts of November travel between Canada and other countries** show dramatic increases in the number of trips by international and Canadian travellers compared with the same month in 2020. However, the volumes remain down compared with (pre-pandemic) November 2019. A similar dynamic is evident with Statistics Canada's **preliminary counts of international travel in December**.
- Statistics Canada's **Tourism Activity Tracker** shows that the country's combined tourism activity was 36% lower in October than the corresponding pre-pandemic month in 2019. Nova Scotia's combined tourism output was 38% below the province's performance in October 2019. In both cases, the values are a slight improvement over the relative performances in September.

Summary

- The most recent Destination Canada Travel Recovery Assessment says that Quebec and Prince Edward Island, after progressing into the *Tentative International (V)* phase of recovery in November, both **moved back into the Interprovincial (IV) phase** in January – joining all other provinces and territories there – likely a result of the Omicron variant adversely impacting travel sentiment.
- Destination Canada’s latest survey of resident sentiment shows an **overall decline in attitudes toward travel** – including about the safety of travel, and sentiment toward visitors – across the country in December and January. The decline is particularly acute in Atlantic Canada, compared with other regions.
- The federal government reports that the **number of active COVID-19 cases in Canada increased** from 234,000 at the end of December to 299,000 by January 20, and the **rate of active cases rose** from 611 to 781 per 100,000 population. Despite these increases, the volume of new daily cases being reported appears to have turned a corner in January and is now falling.

Summary

- Destination Analysts reports that a minority of American travellers (three in 10) say the **challenge and hassle of finding COVID-19 tests** has stopped them from travelling in the past month. About half of travellers (five in 10), say this difficulty has not prevented them from taking trips.
- The Official Aviation Guide (OAG) projects that airline seat capacity, having declined in early January, is **expected to increase over the next three months**, particularly on international routes.

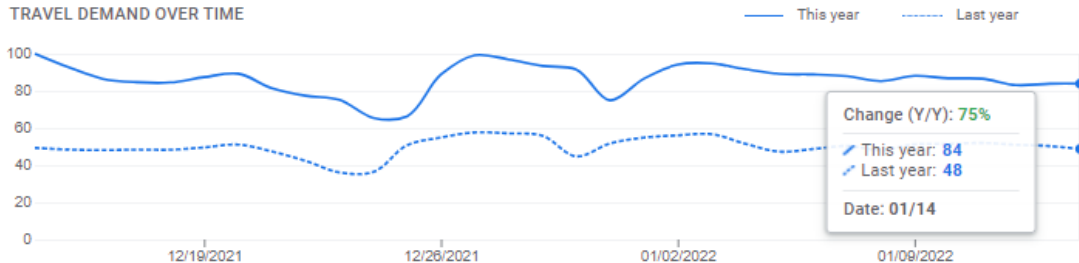
Google Destination Insights

As of January 14, 2022

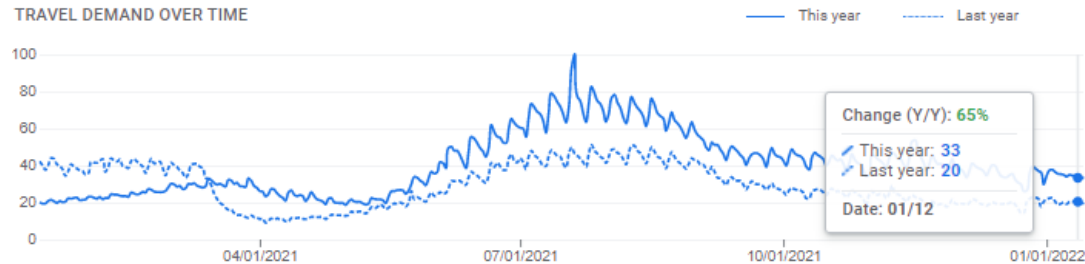
Google Destination Insights: Online *Domestic* Travel Interest in Canada

- 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 Dec. 14 2021 to Jan. 14 2022



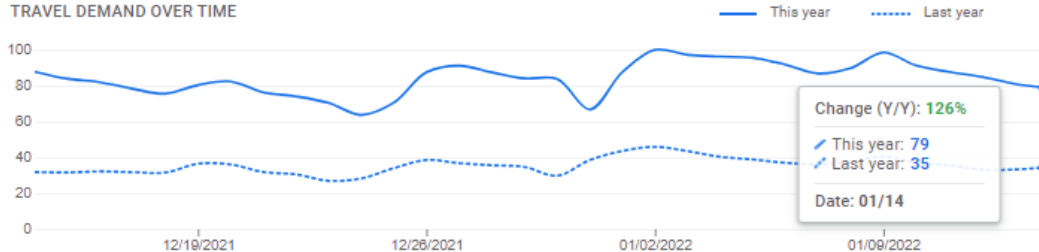
12-month domestic travel demand Jan. 14 2021 to Jan. 14 2022



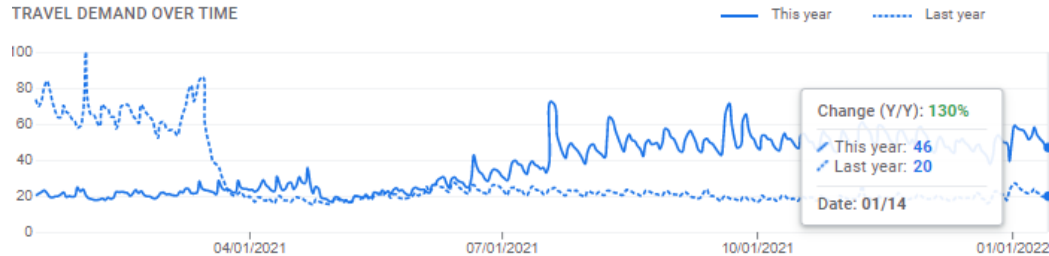
Google Destination Insights: Online *International* Travel Interest in Canada

- The graphs show Google searches **worldwide** (excluding by Canadians) 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, Dec. 14 2021 to Jan. 14 2022



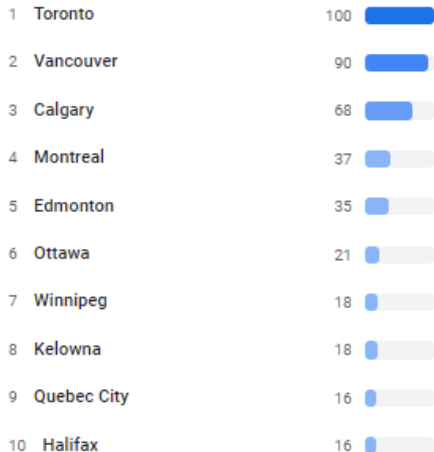
12-month international demand, Jan. 14 2021 to Jan. 14 2022



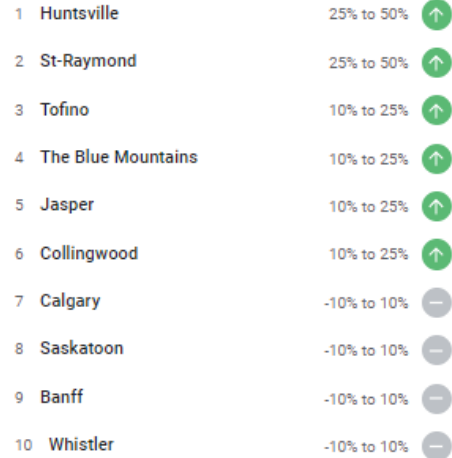
Google Destination Insights: 30-Day Domestic Demand by Destination City

- Cities are scored on an index of 0-100, based on domestic Google search demand by Canadians between **Dec. 14, 2021 to Jan. 14, 2022** 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 **Dec. 14, 2021 to Jan. 14, 2022** compared to the previous 30-day period.

TOP DEMAND BY DESTINATION CITY

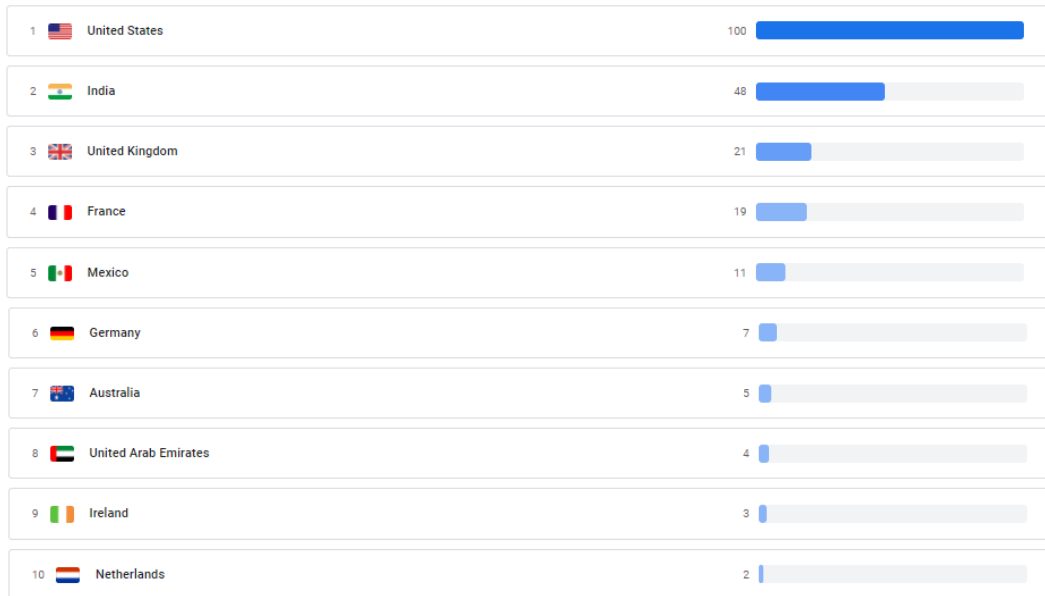


TOP GROWTH BY DESTINATION CITY



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

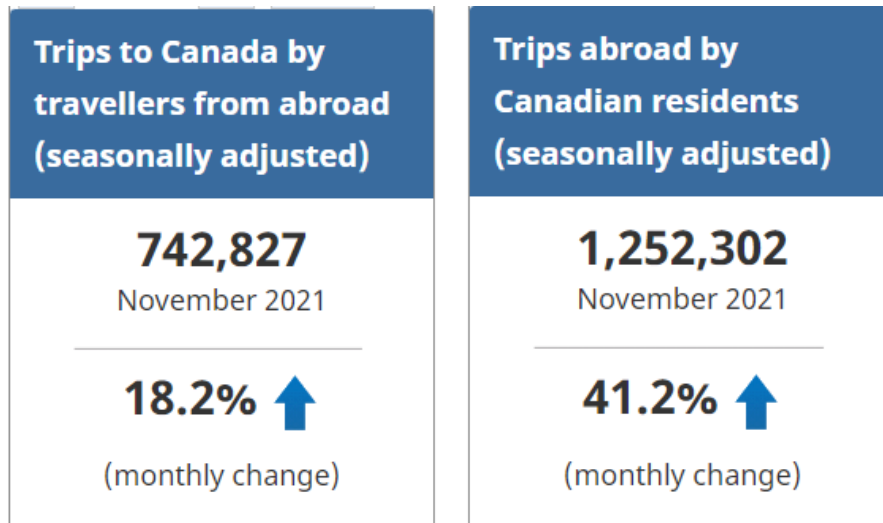
- Top sources of worldwide online search demand for international travel to Canada, **Dec. 14, 2021 to Jan. 14, 2022**. Countries are scored by search volume, on an index of 0-100, with 100 being the highest indexed volume over the period.



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

Released January 21, 2022

Statistics Canada: Travel Between Canada and Other Countries in November



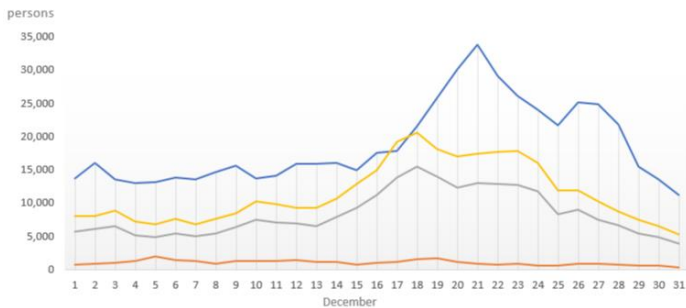
- Trips to Canada by travellers from other countries were **up 18%** in November over the previous month, and were up 390% from November 2020, but were down 72% from pre-pandemic levels in November 2019.
- Trips to other countries by Canadians were **up 41%** in November over the previous month, and were up 255% from November 2020, but were down 73% from pre-pandemic levels in November 2019.

Statistics Canada: International Arrivals – Preliminary Counts, December 2021

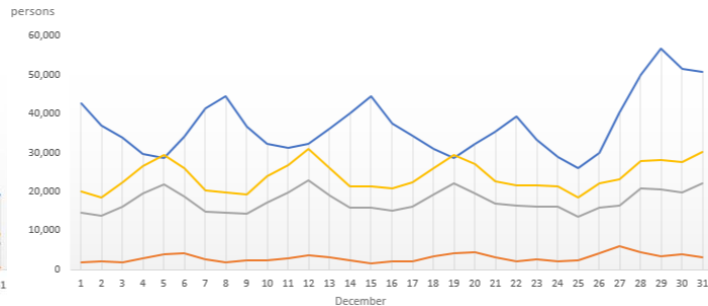
Released January 12, 2022

Statistics Canada: International Air Arrivals in December

Non-resident



Canadians

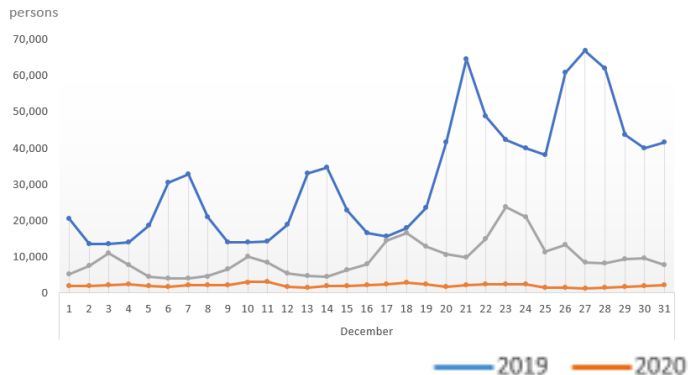


— 2019
 — 2020
 — 2021 (excluding Toronto/Pearson Terminal 1)
 — 2021 (including Toronto/Pearson Terminal 1)

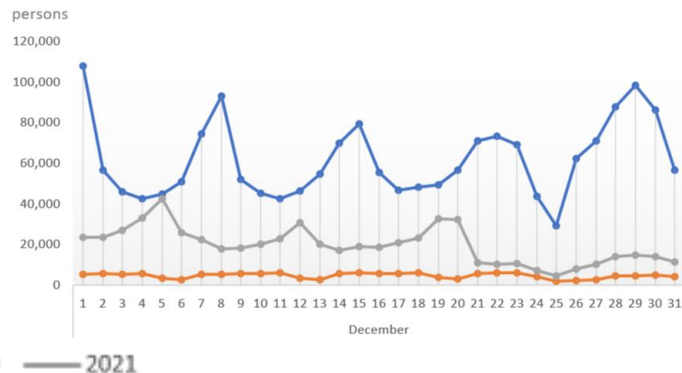
- Non-residents** arriving at Canadian airports:
 - December 2021 – 352,900
 - December 2020 – 32,500
 - December 2019 – 577,800
- Canadians** arriving at Canadian airports:
 - December 2021 – 742,400
 - December 2020 – 93,800
 - December 2019 – 1.2 million
- Air arrivals were up dramatically in December 2021** over December 2020, but remained down from the same month in 2019.

Statistics Canada: International Road Arrivals in December

US residents



Canadians



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

December 2021 – 291,600
 December 2020 – 61,000
 December 2019 – 977,200

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

December 2021 – 609,900
 December 2020 – 146,000
 December 2019 – 1.9 million

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

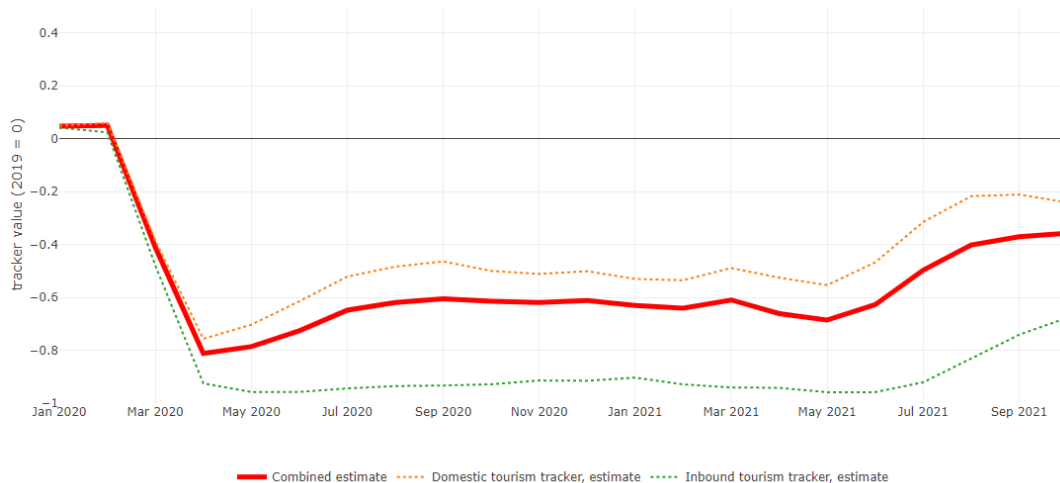
Statistics Canada: Canadian Tourism Activity Index

Updated to October 2021

Statistics Canada: Tourism Activity Index – Canada

- The index shows the relative performance of aggregated tourism activity in Canada (ie. arrivals, departures, spending etc.) over time. The base period – with an index measure of '0' – is 2019.

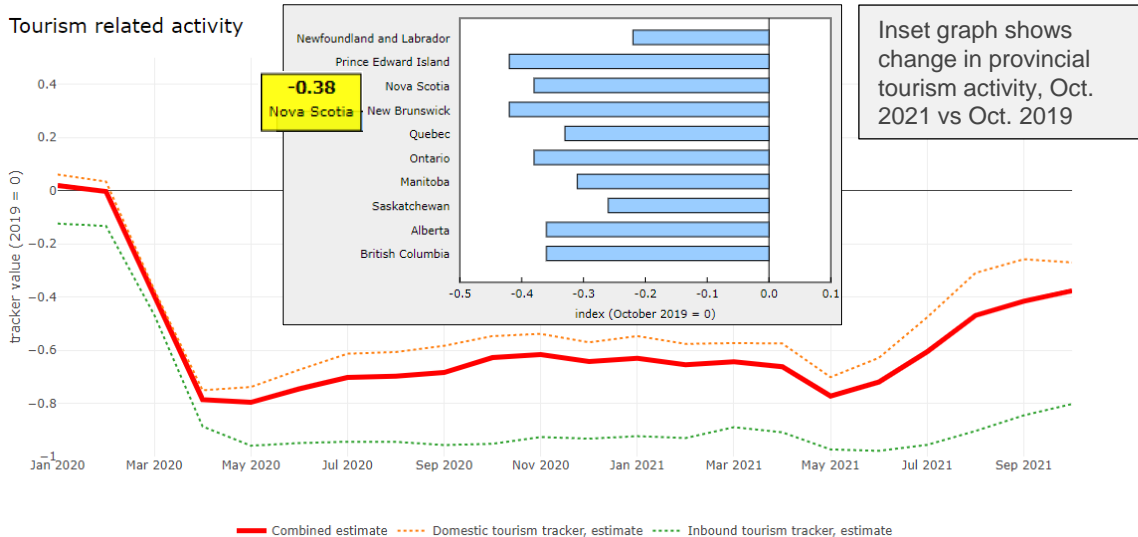
Tourism related activity



- In **October 2021**, combined tourism activity in **Canada** was **35.8% below** the level in October 2019, which is a small improvement from the index level in September 2021 (-37%). This was due to increased inbound (international) tourist visits into Canada during the fall.

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 **October 2021**, combined tourism activity in **Nova Scotia** was **38% below** the level in October 2019, an improvement from September 2021 (-42%). Nova Scotia's October decline is slightly greater than the national decline (-35.8%), and on par with Ontario's performance (also -38%). (See inset).

Destination Canada: Travel Recovery Assessment

Updated to January 4, 2022

Destination Canada Provincial Travel Recovery Assessment

Timeline of overall assessment for each province and territory:

	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	16-Nov	23-Nov	30-Nov	07-Dec	04-Jan
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	V	V	IV
New Brunswick	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV
Nova Scotia	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV
Prince Edward Island	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	V	V	V	V	IV
Newfoundland & Labrador	IV	IV	IV	IV	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 **January 4, 2021**:

- All provinces and territories are in the **Inter-provincial (IV)** phase of recovery.
- After briefly progressing into the **Tentative International (V)** phase of recovery in November, Quebec and Prince Edward Island have moved back into the **Inter-provincial (IV)** phase, due to the impact of the COVID-19 Omicron variant on travel sentiment in those provinces.

Destination Canada: Resident Sentiment Survey

Updated data to week of January 18, 2022

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	76	84	75	79	74	79	78	79
Communities in my province	64	80	70	69	75	67	64	68
Other provinces in Canada	47	64	54	52	59	32	24	36
The United States	18	38	31	24	33	13	7	15
Other countries	17	34	28	22	30	11	9	13
SAMPLE SIZE	208	205	200	604	415	201	132	69

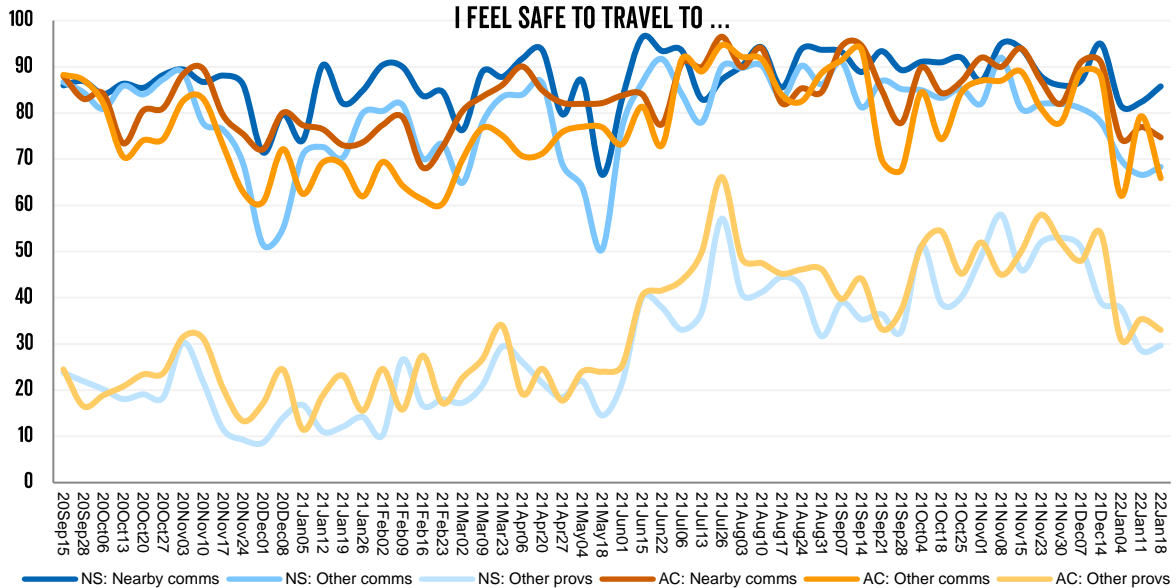
- % Somewhat / Strongly Agree.
- Note: red/green text indicates a significant difference between regions.
- Results from week of January 18, 2022.

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 minority in most regions feel safe travelling *internationally*.
- About half, or more than half, of Canadians in all regions outside Atlantic Canada would feel safe travelling to *other provinces*.
- Only one-third of Atlantic Canadians would feel safe travelling to *other provinces*.
- Atlantic Canadians' feelings of safety travelling *to nearby communities* are similar to the sentiment in other regions. However, their comfort level with travel *anywhere else*, particularly outside their own province, has fallen well behind the sentiment in most other regions.
- At the same time, comfort with travelling outside one's *own province* has dropped generally, across all regions, through December and January.

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

ATLANTIC CANADIANS (EXCLUDING NS) VS NOVA SCOTIANS



- Among both Nova Scotians and Atlantic Canadians, feelings of safety for travelling in general have decreased through December 2021 and January 2022.

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	64	77	60	60	63	74	78	72
Communities in my province	59	74	57	56	62	67	67	67
Other provinces in Canada	40	67	45	46	52	33	31	34
The United States	24	46	27	22	28	20	20	20
Other countries	19	40	22	20	25	16	15	17
SAMPLE SIZE	212	202	200	616	418	202	126	75

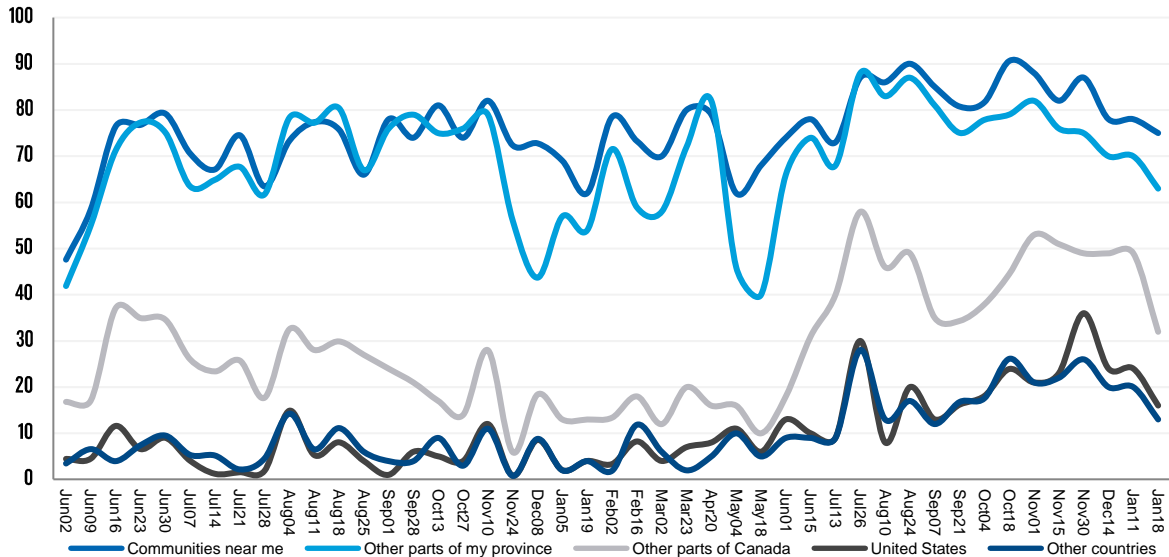
- % Somewhat / Strongly Agree.
- Note: red/green text indicates a significant difference between regions.
- Results from week of January 11, 2021.

Destination Canada Resident Sentiment – Welcoming Visitors

- A majority of Canadians in all regions are willing to welcome visitors from *within their own province*, with residents of Alberta and Atlantic Canada more likely to do so than those from other regions.
- Outside of Alberta and Quebec, only a minority of Canadians are willing to welcome visitors from *other parts of the country*, with Atlantic Canadians the least willing in this regard.
- Canadians remain generally negative about welcoming *international* visitors. Atlantic Canadians are the most negative, and Alberta residents the most positive, about such visitors.
- There has been a general decline in welcoming sentiment across all regions, through December and early January.

Destination Canada Resident Sentiment – Welcoming Visitors, Among Nova Scotians

NOVA SCOTIANS: I WOULD WELCOME VISITORS TRAVELLING TO MY COMMUNITY FROM ...



- Nova Scotians' welcoming sentiment for visitors from all areas was fairly flat through much of the autumn. There has been a significant downturn in December and January, particularly regarding visitors from outside the province.

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	+31	+36	+32	+33	+50	+41	+37	+44
Communities in my province	+19	+40	+22	+28	+48	+29	+24	+33
Other provinces in Canada	+2	+30	+7	+18	+40	+1	-18	+12
The United States	-29	+5	-14	-20	+4	-37	-53	-26
Other countries	-26	+1	-19	-18	+3	-37	-50	-29
SAMPLE SIZE	208	205	200	604	415	201	132	69

- 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 January 18, 2022.

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*.
- Residents of Atlantic Canada, British Columbia, and Saskatchewan / Manitoba are neutral when it comes to having their communities advertised to visitors from *other parts of the country*, while those from all other regions are positive about the idea.
- There is increasing variability among regions when it comes to having their communities advertised to *international* visitors: residents from Alberta and Quebec residents are neutral or slightly positive, while the idea remains unpopular in the remaining regions.
- Sentiment among Atlantic Canadians for having their communities promoted has declined substantially for all visitor markets through December and January.

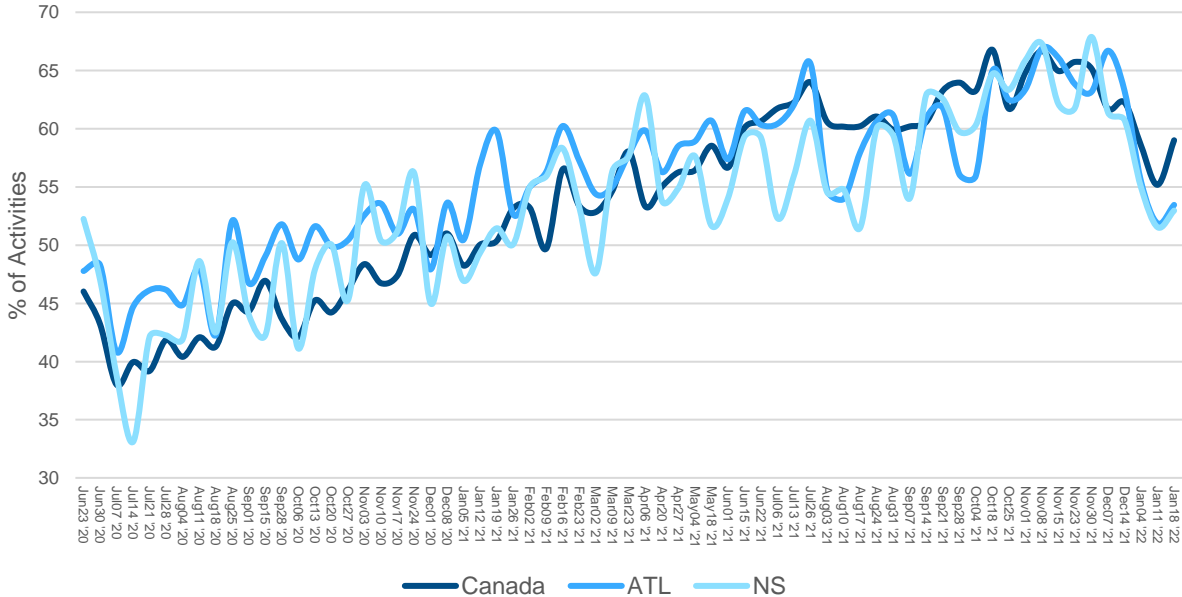
Destination Canada – Comfort With Activities, Most/Least Comfortable

- ‘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	80	79	86
Shopping at the mall	79	73	72
Going back to your workplace/office	77	81	71
Dining in restaurants	73	71	76
Activities least comfortable with:			
Flying on an airplane	43	29	24
Going to bars, lounges, night clubs, pubs	43	44	40
Large gatherings such as sporting events, concerts, or festivals	40	38	34
Travelling to the United States	39	24	16
SAMPLE SIZE	1833	201	90

- % Comfortable with each activity, among applicable.
- Results from week of January 18, 2022.

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

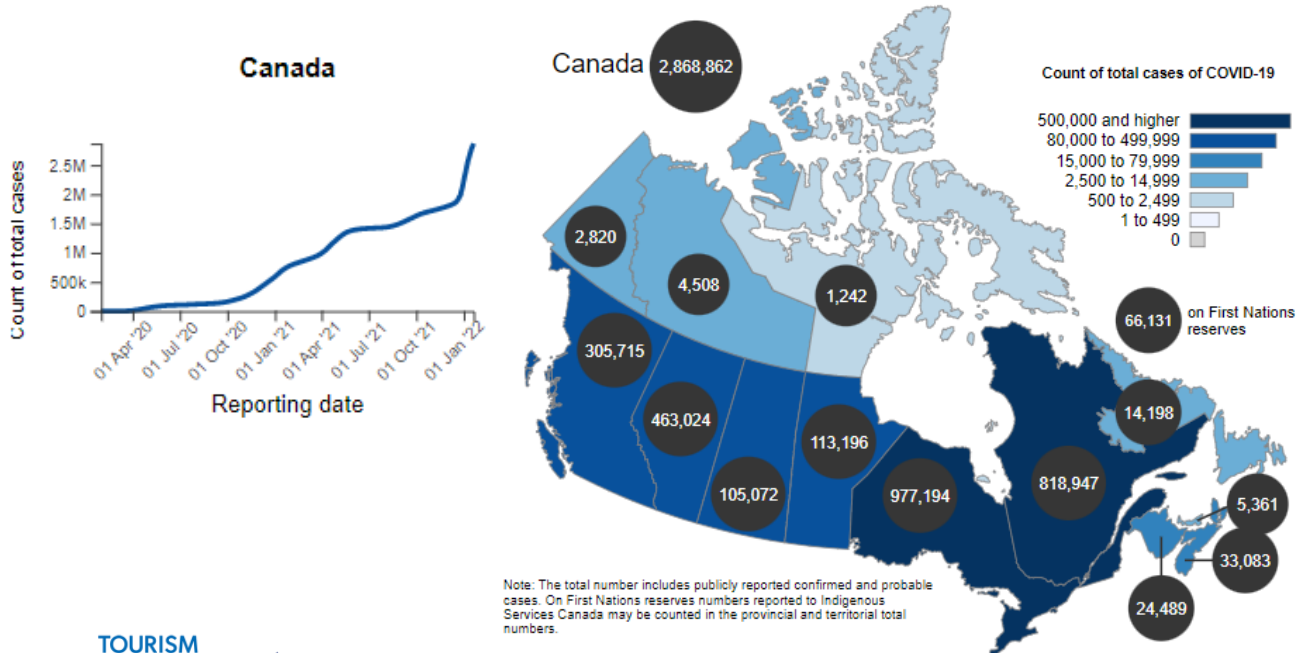
- While the overall percentage of activities that Canadians are comfortable with has gradually increased over the course of 2021, there has been a substantial decrease in December 2021 through January 2022.
- Among those activities Canadians are least comfortable with, about four in 10 express comfort with *going to bars and pubs*, *flying on an airplane*, and *attending large public gatherings*. The least popular activity among Canadians is *travelling to the United States*, with a low of 39% saying they are comfortable doing this.
- Atlantic Canadians continue to lag behind other Canadians' willingness to *travel to the United States*, or to *fly on an airplane*.

Government of Canada COVID-19 Status

As of January 21, 2022

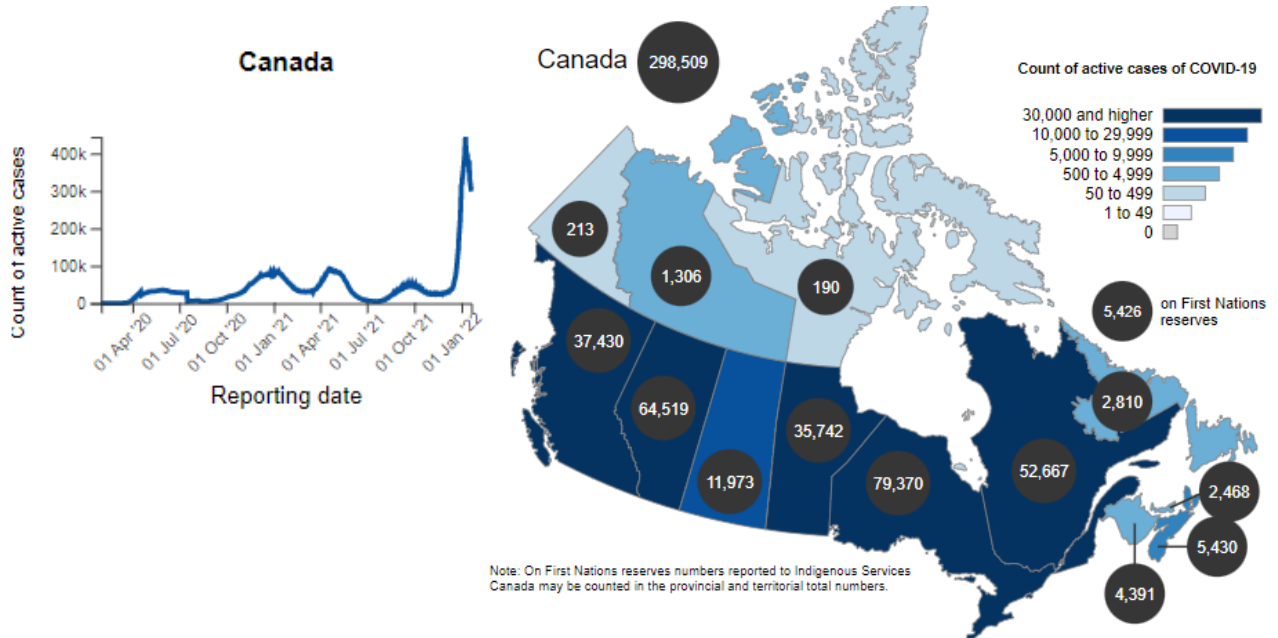
Government of Canada – COVID-19 Count of *Total* Cases

- The count of total cases of COVID-19 in **Canada** was **2,868,862** as of January 20, 2022.



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

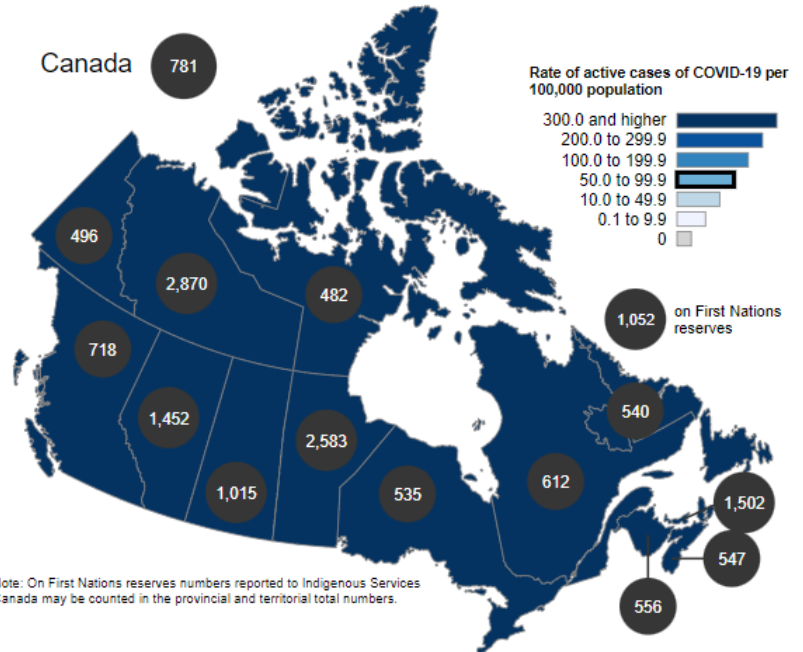
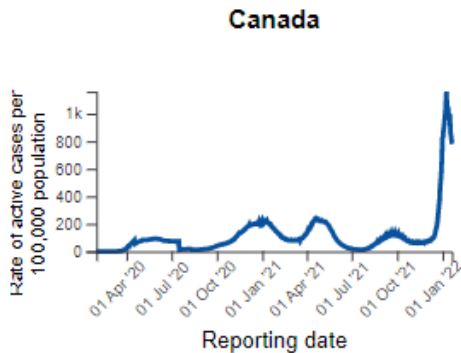
- The count of active cases of COVID-19 in **Canada** was **298,509** as of January 20, 2022.



Government of Canada – COVID-19

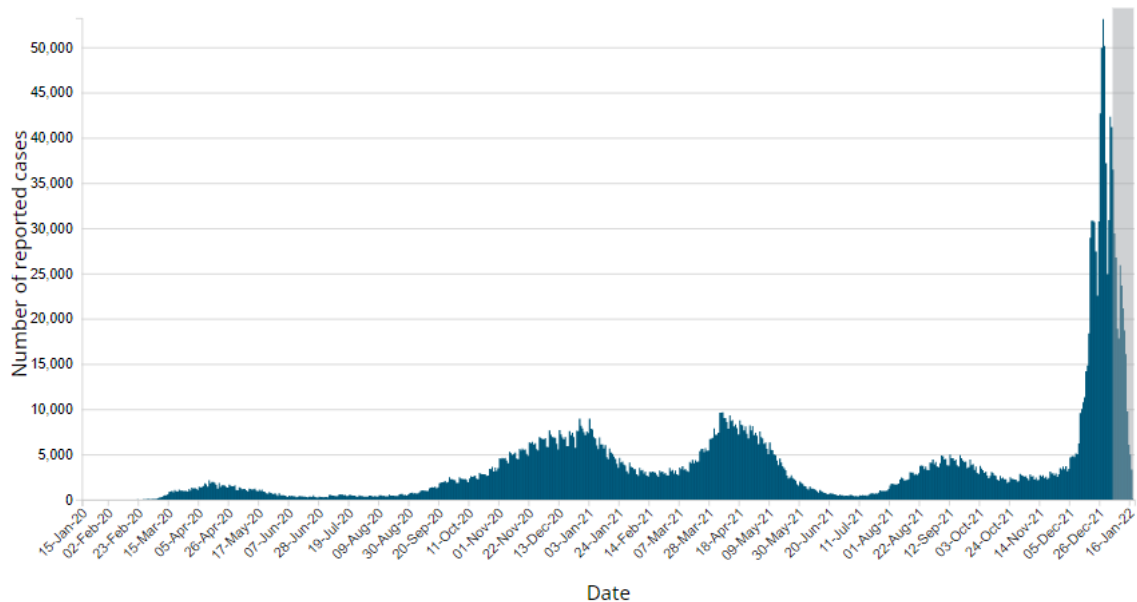
Rate of Active Cases

- The rate of active cases of COVID-19 in **Canada** was **781 per 100,000 population** as of January 20, 2022.



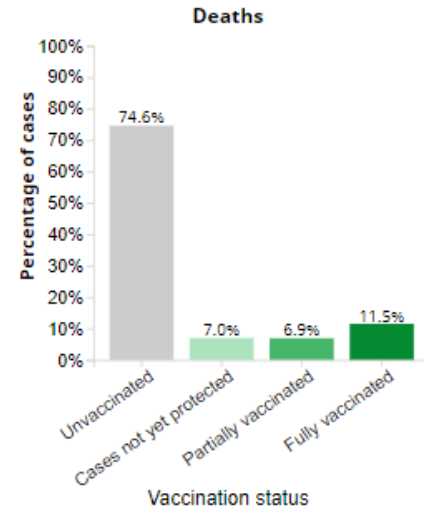
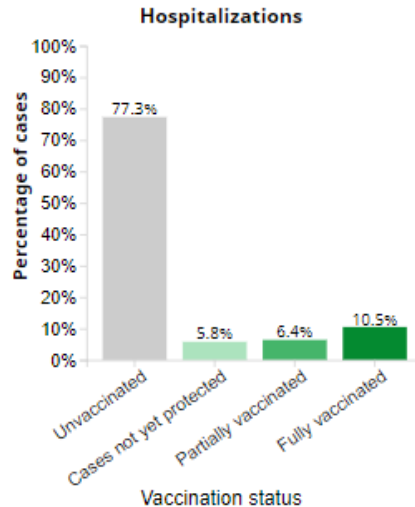
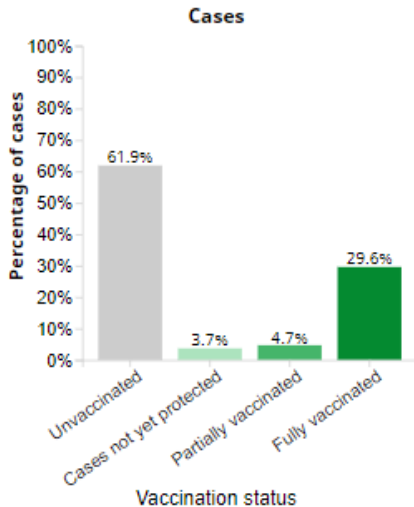
Government of Canada – COVID-19 Cases by *Date* (Epidemic Curve)

- Total COVID-19 cases in Canada (n=2,784,304) by date of illness onset, as of January 21, 2022.



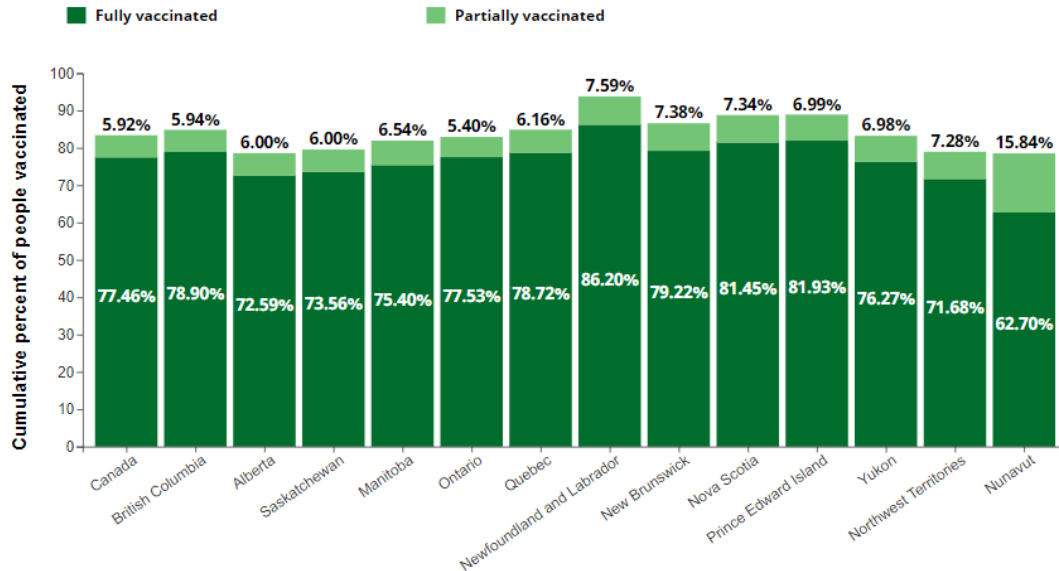
Government of Canada – COVID-19 Cases by *Vaccination Status*

- Percentage of COVID-19 cases in Canada by vaccination status, as of January 1, 2022.



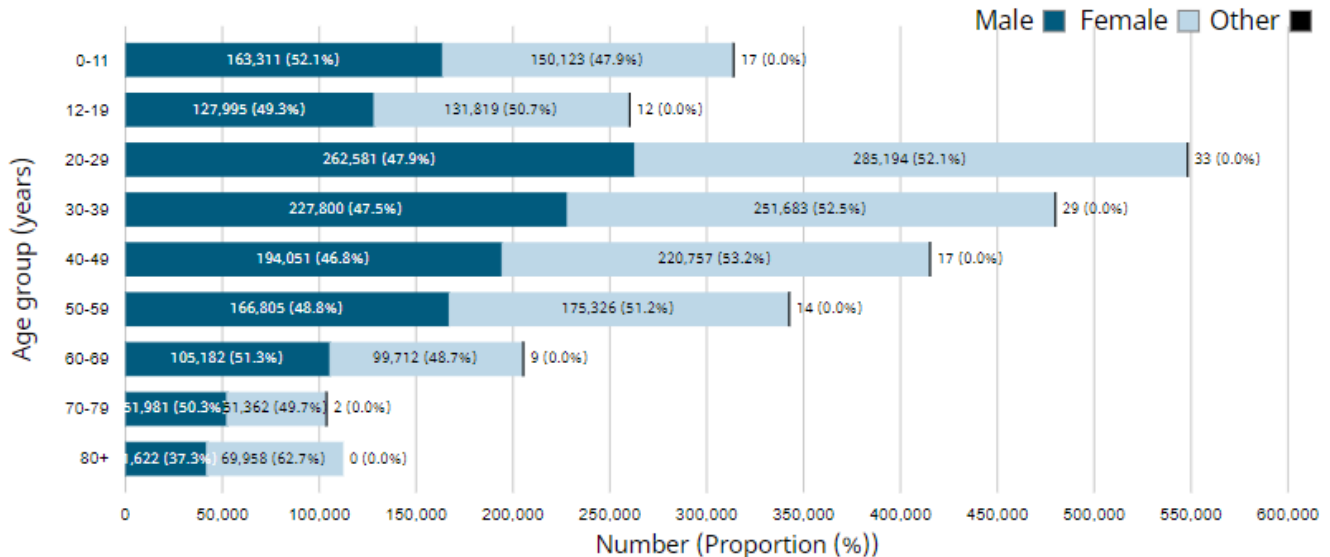
Government of Canada – Percentage Fully Vaccinated

- The cumulative percent of the population **fully vaccinated** with a COVID-19 vaccine in Canada was **77.46%** as of January 15, 2022.



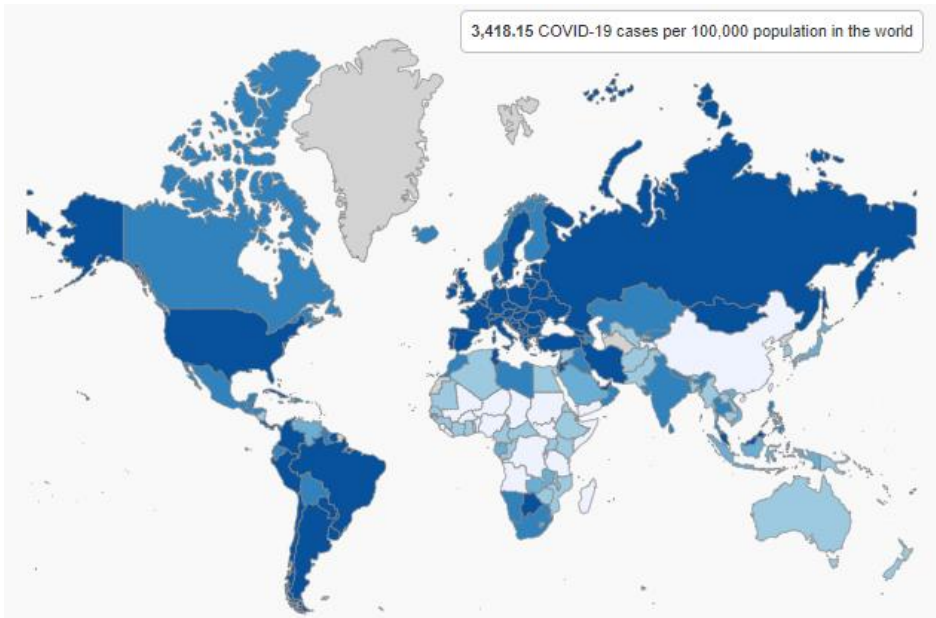
Government of Canada – COVID-19 Cases by Age & Gender Distribution

- Total COVID-19 cases in Canada by age group and gender, as of January 21, 2022.

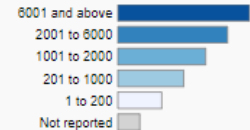


Government of Canada – COVID-19 World Cases, by Country

- Number of COVID-19 cases per 100,000 people, by country, on November 29, 2021.

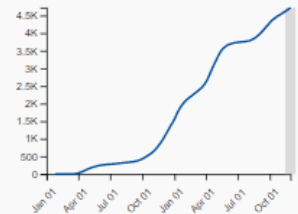


Number of cases per 100,000 population of COVID-19



Canada

4,724.49 COVID-19 cases per 100,000 population as of November 29th, 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 Analysts American Travel Sentiment Tracker

Findings as of January 18, 2022

Destination Analysts: Current State of the Pandemic in the United States

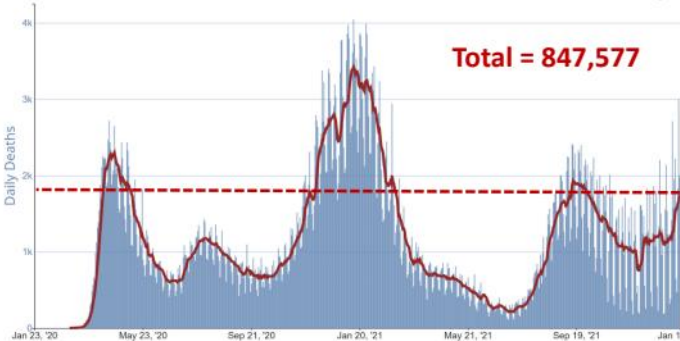
Number of COVID-19 Cases in the USA (Daily)



- January 13, 2022: The number of new COVID-19 cases in the US is rising.

- January 13, 2022: The number of COVID-19 related deaths in the US is rising.

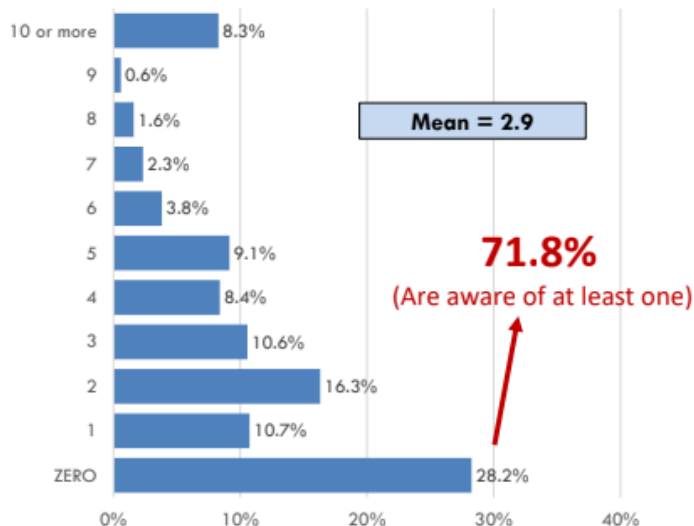
Number of COVID-19 Deaths in the USA (Daily)



Destination Analysts: Large Majority Know Someone Who Recently Got COVID-19

Question: In your circle of friends, coworkers and relatives, how many people are you aware of who have contracted COVID-19 IN THE PAST MONTH? (Select one)

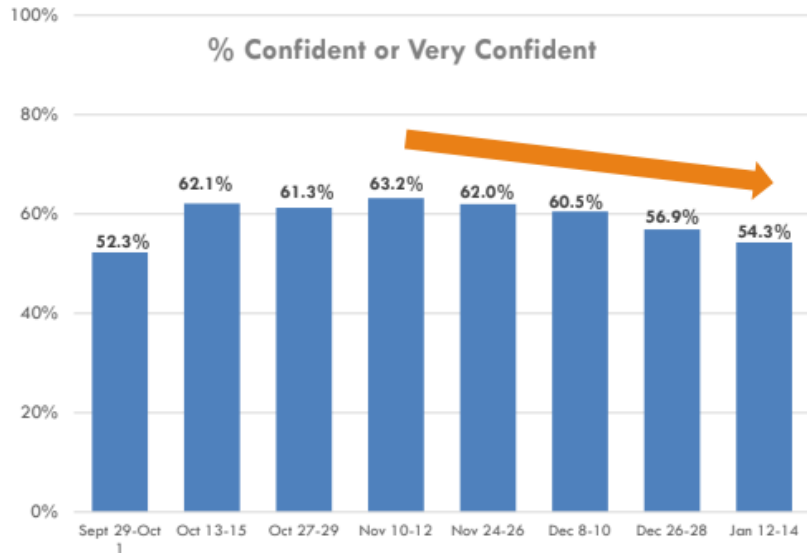
(Base: Wave 82 data. All respondents, 1,202 completed surveys. Data collected January 12-14, 2022)



- More than seven in 10 US travellers say they know at least one person among their acquaintances who has contracted COVID-19 in the past month.

Destination Analysts: Confidence Wanes in Protection Offered by COVID-19 Vaccines

Question: How confident do you feel in the protection against COVID-19 your vaccination is providing you? (Select one)

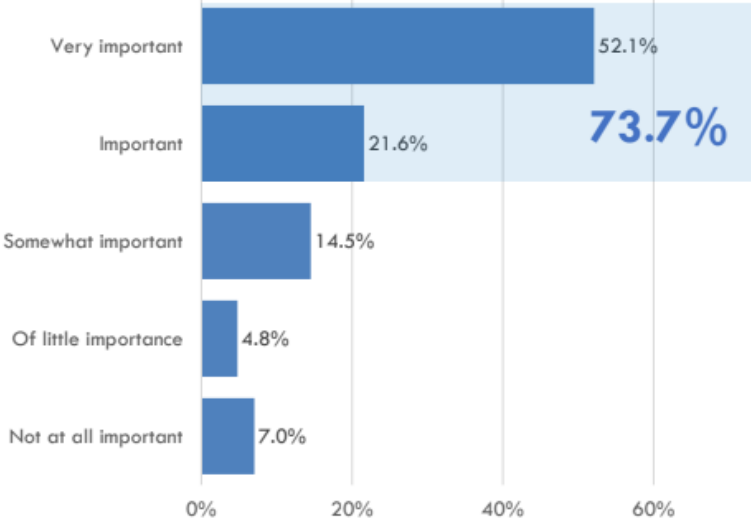


- Only about half of US travellers express confidence in the protection afforded by their COVID-19 vaccinations – down from more than six in 10 expressing confidence before the arrival of the Omicron variant in the fall.

Destination Analysts: US Travellers Want Destinations to Maintain Safety Practices

Question: How important is it to you that the destinations you visit are continuing to maintain careful COVID-19 safety protocols and practices? (Select one)

(Base: Wave 82 data. All respondents, 1,202 completed surveys. Data collected January 12-14, 2022)

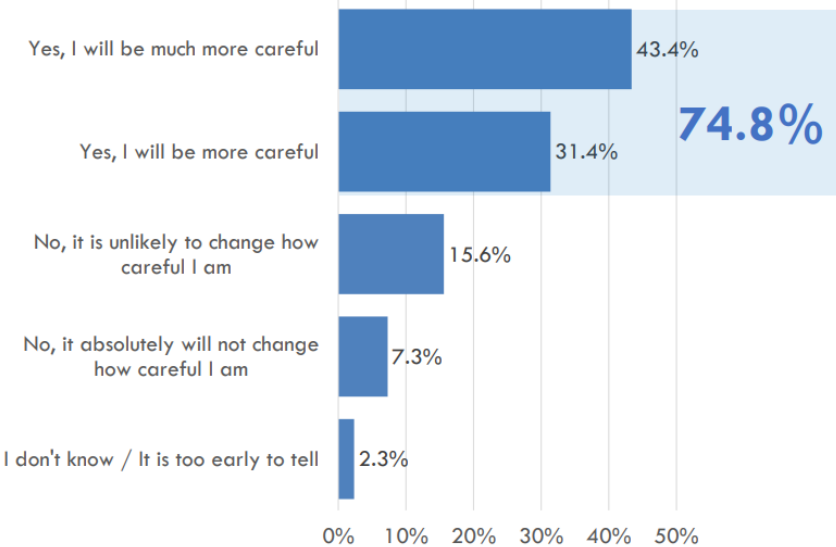


- Three-quarters of US travellers consider it important for COVID-19 safety practices to be maintained at the places they visit. More than half say this is ‘very important.’

Destination Analysts: Most Travellers Vow More COVID Vigilance On Upcoming Trips

Question: Due to the "Omicron variant" will you be MORE CAREFUL about COVID-19 safety in your upcoming trips? (select the one that best describes you)

(Base: Wave 82 data. All respondents, 1,202 completed surveys. Data collected January 12-14, 2022)

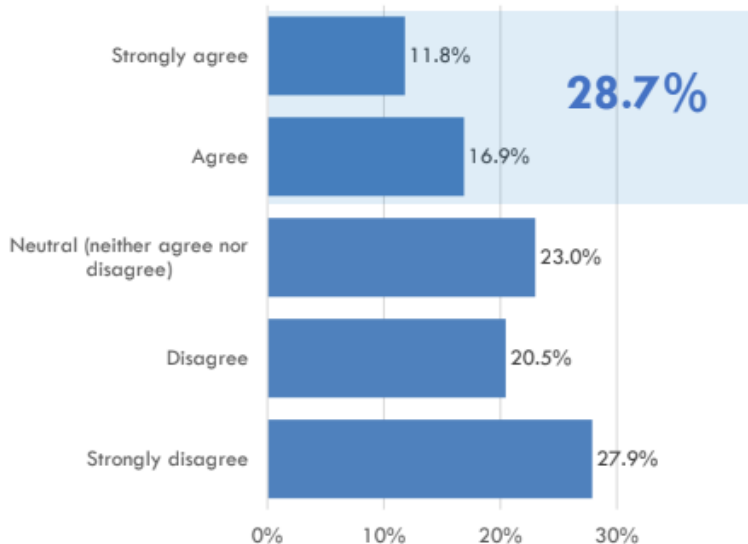


- Three-quarters of US travellers say they will be more careful about COVID-19 safety during their upcoming trips because of concerns about the Omicron variant. This includes four in 10 who say they will be 'much more careful.'

Destination Analysts: Challenge of Finding COVID-19 Tests Preventing Some Travel

Question: IN THE PAST MONTH, challenges in getting COVID-19 tests (hassles, lack of test kit availability, etc.) have stopped me from traveling. (Select one)

(Base: Wave 82 data. All respondents, 1,202 completed surveys. Data collected January 12-14, 2022)



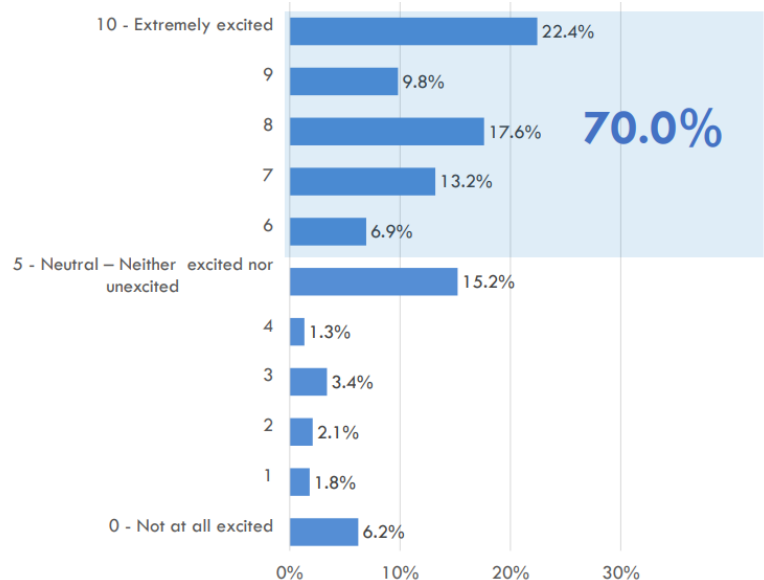
- Three in 10 US travellers say the difficulty of getting COVID-19 tests have stopped them from taking trips in the past month. Five in 10 say such challenges have not stopped them from travelling.

Destination Analysts: Large Majority Still Excited About Travel in the Next Month

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)

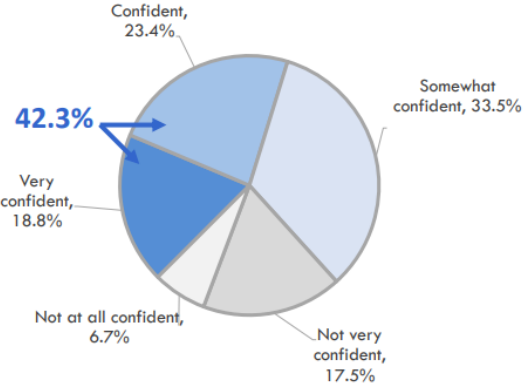
(Base: Wave 82 data. All respondents, 1,202 completed surveys. Data collected January 12-14, 2022)



- Amid the COVID-19 Omicron outbreak, seven in 10 US travellers still say they're excited about the possibility of travel in the next month.

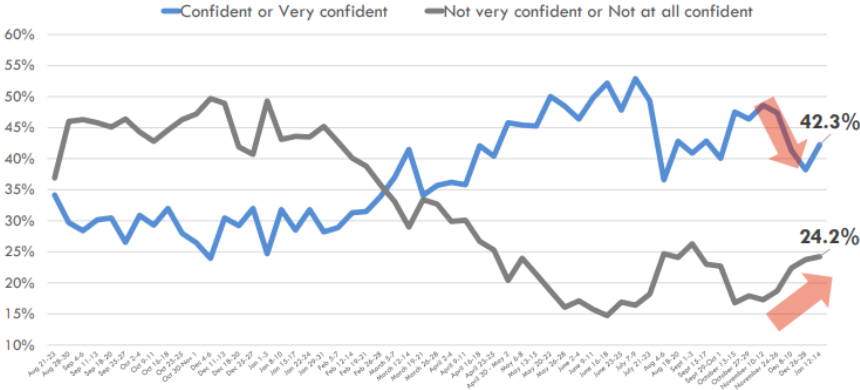
Destination Analysts: Most Still Have Some Confidence They Can Travel Safely

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



(Base: Wave 82 data. All respondents, 1,202 completed surveys. Data collected January 12-14, 2022)

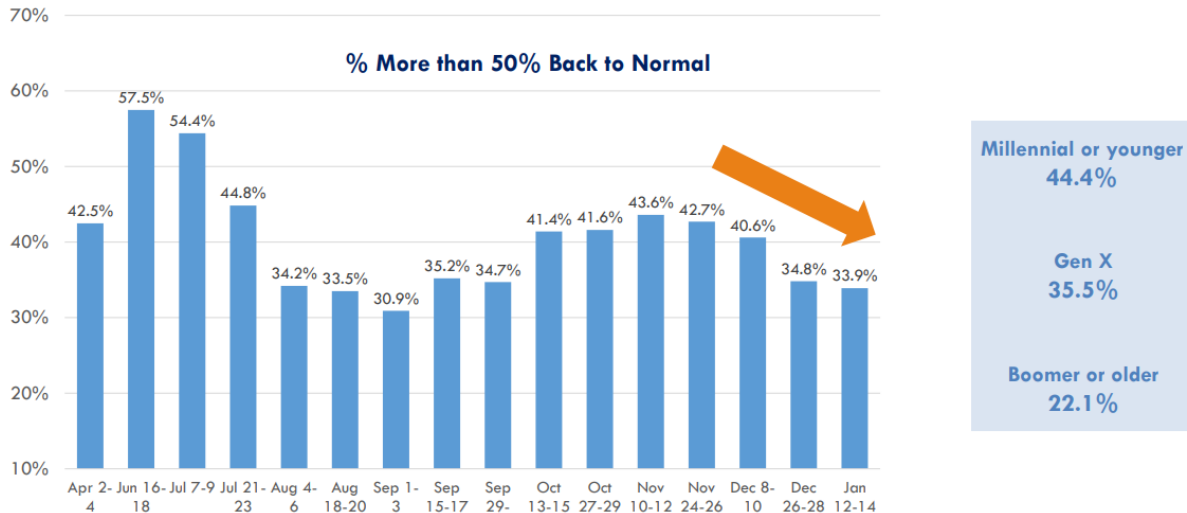
Historical data



- Four in 10 US travellers are confident that they can travel safely in the current pandemic environment. One-third are 'somewhat' confident, while one-quarter are not confident. Lack of confidence has been rising since October.

Destination Analysts: Sentiment Declining About a Return to Normal For Travel

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



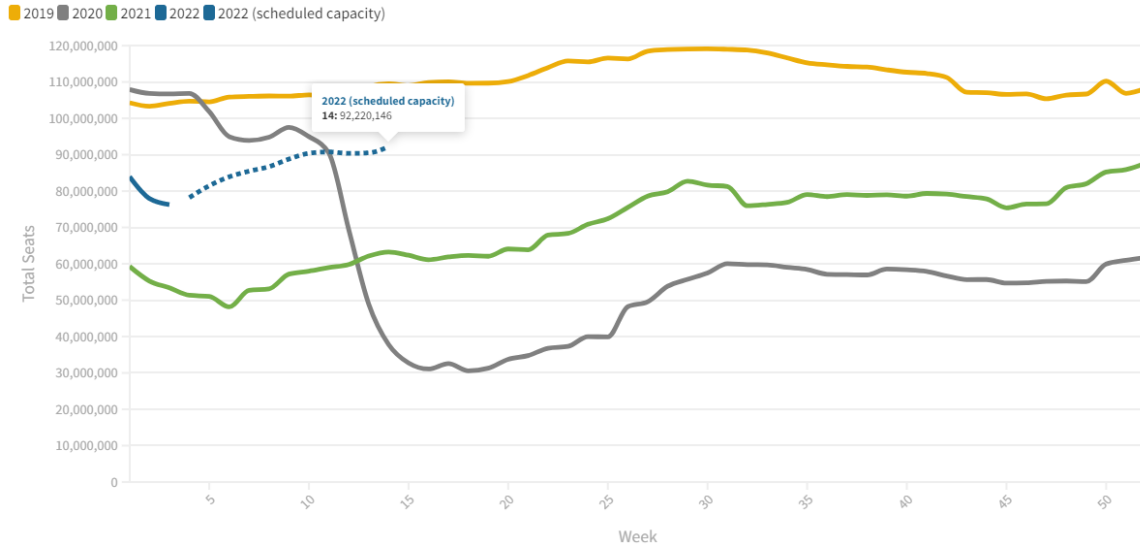
- One-third of US travellers say their country is more than 50% back to ‘normal’ in terms of resuming travel and leisure activities – down from more than four in 10 who said this in November.

OAG Official Aviation Guide Recovery Tracker

Updated to Week of January 17, 2022

OAG – Global Airline Seat Capacity Expected to Pick Up Steam in 2022

Global Scheduled Airline Seat Capacity, Domestic and International, Year-Over-Year Comparison. Updated to Week of January 17, 2022



- Global airline seat capacity, while dropping in January, is expected to increase over the next three months, especially on international routes.

OAG – Airline Seat Capacity Falls in Some Regions in January, Rises in Others

Seat Capacity Change by Region, and Globally

Region	Seats in Jan-22	Change v Jan-19	% Change	Change v Dec-21	% Change
Africa : Central/Western Africa	2,652,277	-3.9%		-2.1%	
Africa : Eastern Africa	2,612,938	-21.5%		-0.2%	
Africa : North Africa	2,961,451	-33.2%		-8.8%	
Africa : Southern Africa	1,939,422	-44.3%		-5.9%	
Asia : Central Asia	1,300,939	-16.8%		-4.5%	
Asia : North East Asia	87,627,770	-16.0%		10.4%	
Asia : South Asia	19,556,709	-12.4%		-2.0%	
Asia : South East Asia	22,524,072	-48.9%		15.9%	
Europe : Eastern/Central Europe	13,446,352	-18.0%		-6.7%	
Europe : Western Europe	54,966,450	-35.8%		-15.0%	
Latin America : Caribbean	3,632,493	-18.3%		0.6%	
Latin America : Central America	10,646,756	3.8%		0.0%	
Latin America : Lower South America	14,410,126	-20.1%		6.4%	
Latin America : Upper South America	7,129,113	-5.4%		1.4%	
Middle East	14,422,418	-26.5%		0.7%	
North America	88,070,033	-11.1%		-2.4%	
Southwest Pacific	7,884,471	-37.7%		9.4%	
Global	355,783,790	-22.7%		-0.2%	

- Global seat capacity is down 23% in January compared with January 2019, but down only 0.2% over the previous month (December 2021).
- In North America, capacity is down 11% compared with January 2019, and down 2.4% since the previous month.

Seat Capacity Change by Major Airline

