### 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: <a href="mailto:tourismresearch@novascotia.ca">tourismresearch@novascotia.ca</a>



### Source Notes and Methodology

- Google is a US-based online search engine. Its Destination Insights (<u>Destination Insights with Google</u>) 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 (<a href="www.statcan.gc.ca">www.statcan.gc.ca</a>) 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 (<u>COVID-19 daily epidemiology update Canada.ca</u>) is updated from sources including the Public Health Agency of Canada and provincial and territorial partners.



### Source Notes and Methodology

- Destination Canada (<u>www.destinationcanada.com/</u>) 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 thirdparty 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** (<u>www.destinationanalysts.com</u>) 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 (<u>www.oag.com</u>) 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 late November and late December, Halifax remained in 10<sup>th</sup> place in a ranking of online search demand for travel to Canadian cities, according to Google Destination Insights.
- Statistics Canada says international travel between Canada and other countries – although up dramatically in October 2021 over the same month in 2020 – remains down significantly from pre-pandemic levels in October 2019.
- The most recent Destination Canada Travel Recovery Assessment says that at
  the end of November, while 11 provinces and territories remained in the *Inter-*provincial phase (IV) of recovery, Quebec became the second province, along
  with PEI, to advance to the *Tentative International* phase (V) of recovery –
  with international leisure travel being taken by less risk-averse residents.
- In mid-December, a small majority of Canadians continued to express confidence in being able to travel safely to other parts of the country, according to Destination Canada's Resident Sentiment survey. Safety sentiment ranged from a high of 71% among Albertans, to 60% among Ontario residents, to a low of 48% among Atlantic Canadians.



### Summary

- The federal government reports that the *number* of active COVID-19 cases in Canada jumped seven-fold in less than three weeks, from 33,000 on December 10 to almost 234,000 on December 30. Nationally, the *rate* of active cases rose from 86 per 100,000 people on December 10 to 611 per 100,000 on December 30.
- Destination Analysts' latest survey of American travellers shows increasing
  pessimism following the arrival of the COVID-19 Omicron variant, including a
  growing sense that the pandemic will be a long-term problem, and a high
  demand for ongoing safety protocols at travel destinations.
- The Official Aviation Guide (OAG) projects that airline seat capacity in major aviation markets will **increase substantially** in the first three months of 2022 and show significant gains compared with the same months in 2021.



### Google Destination Insights

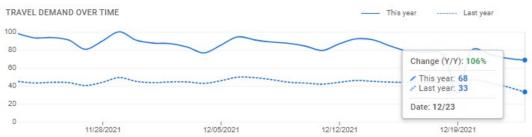
As of December 23, 2021



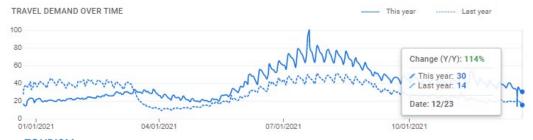
### Google Destination Insights: Online Domestic Travel Interest in Canada

 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 Nov. 23 to Dec. 23, 2021



### 12-month domestic travel demand Dec. 23, 2020 to Dec. 23, 2021

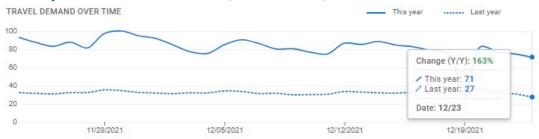




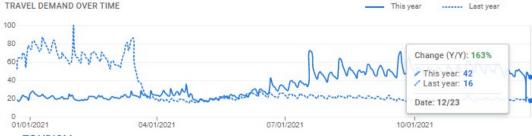
### Google Destination Insights: Online International Travel Interest in Canada

 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.





### 12-month international demand, Dec. 23, 2020 to Dec. 23, 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 Nov. 23 to Dec. 23, 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 **Nov. 23 to Dec. 23, 2021** compared to the previous 30-day period.

### TOP DEMAND BY DESTINATION CITY

1 Toronto	100
2 Vancouver	85
3 Calgary	59
4 Montreal	44
5 Edmonton	34
6 Ottawa	21
7 Quebec City	20
8 Kelowna	19
9 Winnipeg	18
10 Halifax	14

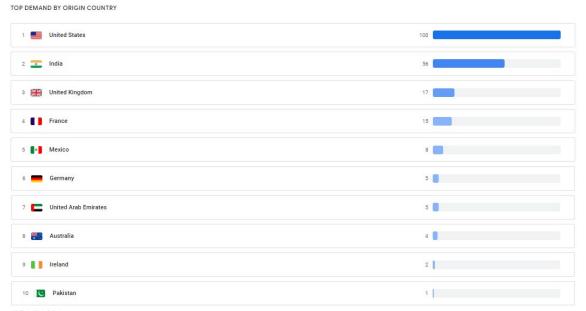
### TOP GROWTH BY DESTINATION CITY

1 The Blue Mountains	25% to 50%
2 Estérel	25% to 50%
3 Calgary	-10% to 10%
4 Kelowna	-10% to 10%
5 Saskatoon	-10% to 10%
6 Kamloops	-10% to 10%
7 Banff	-10% to 10%
8 Whistler	-10% to 10%
9 Hamilton	-10% to 10%
10 Prince George	-10% to 10%



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

 Top sources of worldwide online search demand for international travel to Canada, Nov. 23, 2021 to Dec. 23, 2021. 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 – October 2021

Released December 22, 2021



### Statistics Canada: Travel Between Canada and Other Countries

Trips to Canada by travellers from abroad (seasonally adjusted)

652,810
October 2021

22.2% 
(monthly change)

Trips abroad by
Canadian residents
(seasonally adjusted)

889,193
October 2021

12.0% 
(monthly change)

- Trips to Canada by travellers from other countries were up 22% in October over the previous month, and were up 440% from October 2020, but were down 76% from pre-pandemic levels in October 2019.
- Trips to other countries by Canadians were up 12% in October over the previous month, and were up 150% from October 2020, but were down 81% from pre-pandemic levels in October 2019.



# Destination Canada: Travel Recovery Assessment

Updated to December 7, 2021

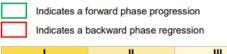


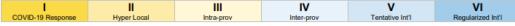
# Destination Canada Provincial Travel Recovery Assessment

### Timeline of overall assessment for each province and territory:

	03-Aug	g 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-De
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	٧	V
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	III	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	٧	٧	V	٧
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:







### **Definitions:**

COVID-19 Response	<b>  </b> Hyper Local	III Intra-prov	IV Inter-prov	V Tentative Int'l	<b>VI</b> Regularized Int'l
Movement is restricted and travel is either not possible, desirable or encouraged.	areas is possible but fring	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 **December 7, 2021**:

- Eleven provinces and territories remain in the Inter-provincial (IV) phase of recovery.
- The week of November 30, Quebec became the second province to progress to the **Tentative International (V)** phase of recovery, joining Prince Edward Island in this phase.



### Destination Canada: Resident Sentiment Survey

Updated data to week of December 14, 2021



# Destination Canada Resident Sentiment – Safety of Travel

'I feel safe to travel to...'

		RE	ATLANTIC CANADA					
	ВС	AB	SK / MB	ON	QC	ATL	Rural	Urban
Communities near me	89	89	77	81	81	92	89	93
Communities in my province	73	82	70	75	79	84	82	84
Other provinces in Canada	53	71	65	60	58	48	41	50
The United States	27	43	36	26	30	25	15	28
Other countries	19	32	29	22	26	20	13	21
SAMPLE SIZE	201	204	201	611	417	200	121	77

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



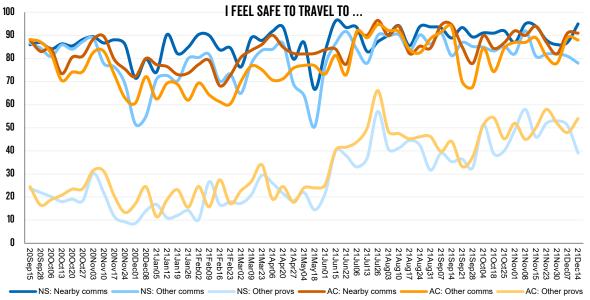
### Destination Canada Resident Sentiment – Safety of Travel

- 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.
- About half or more than half of Canadians in all regions would feel safe travelling to other provinces. Six in 10 residents of both Ontario and Quebec feel safe travelling to other parts of the country.
- Atlantic Canadians' feelings of safety travelling within their provinces are the highest in the
  country, while their comfort level with travel elsewhere is among 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 (represented by the upper lines) and travel to other provinces (represented by the lower
lines) narrowed throughout the summer, but has generally plateaued since October.



# Destination Canada Resident Sentiment – Welcoming Visitors

'I would welcome visitors travelling to my community from ...'

		RE	ATLANTIC CANADA					
	ВС	AB	SK / MB	ON	QC	ATL	Rural	Urban
Communities near me	65	79	67	69	76	82	89	77
Communities in my province	58	76	63	66	76	77	84	74
Other provinces in Canada	47	69	57	56	60	50	49	53
The United States	27	43	38	26	31	28	24	32
Other countries	18	36	28	21	27	23	22	26
SAMPLE SIZE	201	204	201	611	417	200	121	77

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



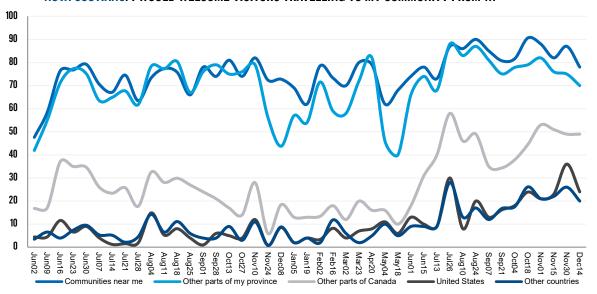
### Destination Canada Resident Sentiment – Welcoming Visitors

- A majority of Canadians in all regions are willing to welcome visitors from within their own province.
- More than half of Canadians from most regions are willing to welcome visitors from other
  parts of the country. The exceptions are British Columbia and Atlantic Canada, where only
  50% or fewer residents would welcome visitors from other provinces.
- Canadians remain generally negative about welcoming international visitors.



# 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 a gradually
increasing minority would welcome international visitors. Positive sentiment in welcoming visitors from
other parts of Canada, which dipped in late summer, has not quite 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?'

		RE	ATLANTIC CANADA					
	ВС	AB	SK / MB	ON	QC	ATL	Rural	Urban
Communities near me	+36	+44	+34	+30	+51	+56	+53	+59
Communities in my province	+30	+46	+24	+26	+44	+53	+46	+59
Other provinces in Canada	+4	+37	+9	+13	+32	+23	+7	+33
The United States	-30	-7	-19	-18	+2	-26	-49	-15
Other countries	-35	-17	-21	-28	-2	-30	-52	-15
SAMPLE SIZE	209	206	201	620	412	201	117	84

- Net level of happiness is the total of Very happy/Happy responses, less the total of Very unhappy/Unhappy responses.
- Note: Green text indicates a net positive response, red text a net negative response, black text a neutral response.
- Results from week of December 7, 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, 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 are only slightly negative or neutral, while the idea remains unpopular in the remaining regions.



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

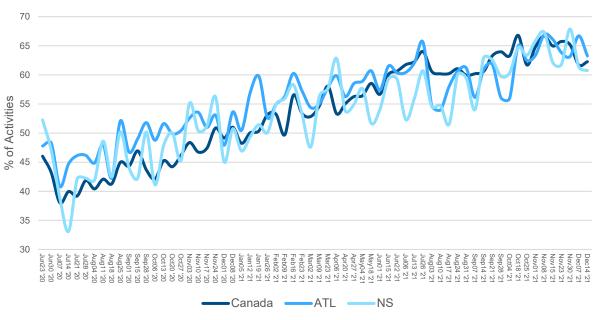
 'Once governments lift the protective measures put in place to fight COVID-19, which of the following would you be comfortable doing ...'

Activity	Canada	Atlantic Canada	Nova Scotia
Activities most comfortable with:			
Allowing in-home renovations	83	86	88
Shopping at the mall	82	85	84
Going back to your workplace/office	79	89	84
Dining in restaurants	78	84	87
Activities least comfortable with:			
Flying on an airplane	47	40	27
Going to bars, lounges, night clubs, pubs	46	41	48
Large gatherings such as sporting events, concerts, or festivals	45	43	43
Travelling to the United States	41	28	24
SAMPLE SIZE	1834	200	104

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

- The overall <u>percentage of activities</u> that Canadians are comfortable with had gradually increased over the course of 2021, but appears to have stabilized since October above the 60% mark.
- Among those activities Canadians are <u>least comfortable</u> with, just under half now 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 41% saying they are comfortable doing this.
- Atlantic Canadians continue to lag behind other Canadians' increasing willingness to travel to the United States.



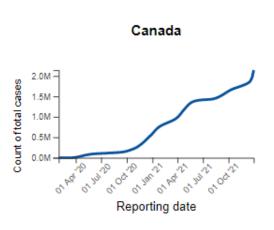
# Government of Canada COVID-19 Status

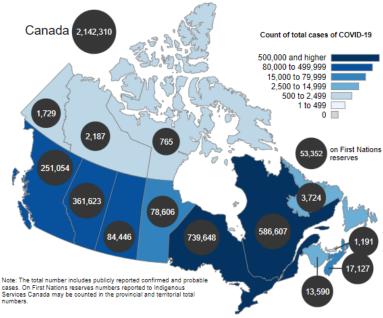
As of December 30, 2021



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

 The count of total cases of COVID-19 in Canada was 2,142,310 as of December 30, 2021.

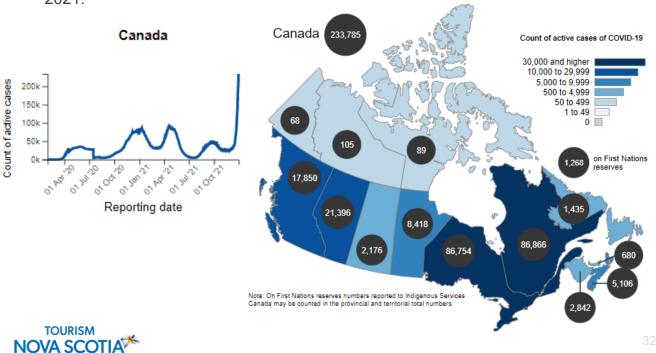






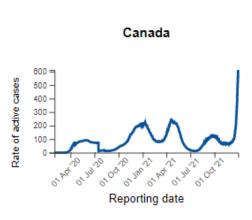
### Government of Canada – COVID-19 Count of *Active* Cases

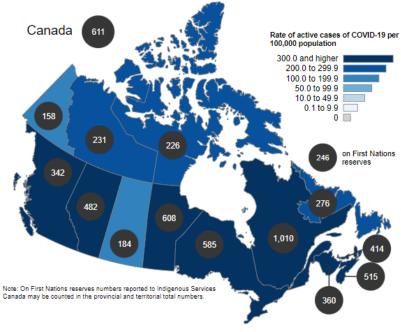
 The count of active cases of COVID-19 in Canada was 233,785 as of December 30, 2021.



### Government of Canada – COVID-19 Rate of Active Cases

• The rate of active cases of COVID-19 in **Canada** was **611 per 100,000 population** as of December 30, 2021.

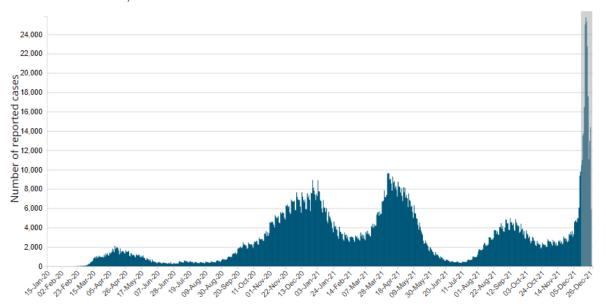






# Government of Canada – COVID-19 Cases by *Date* (Epidemic Curve)

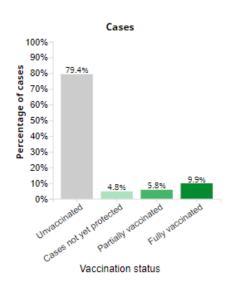
 Total COVID-19 cases in Canada (n=2,098,779) by date of illness onset, as of December 30, 2021.

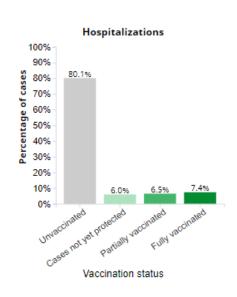


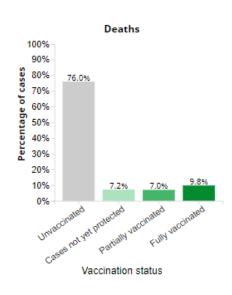


# Government of Canada – COVID-19 Cases by *Vaccination Status*

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



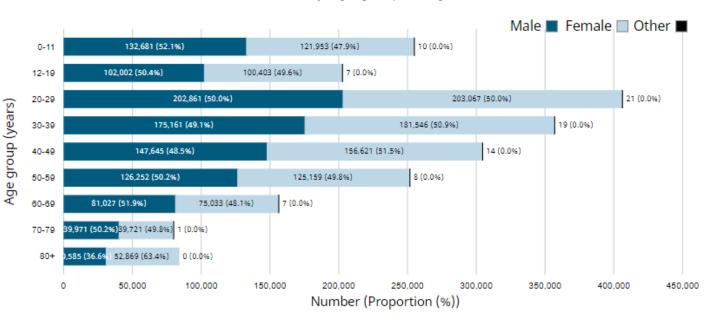






# Government of Canada – COVID-19 Cases by *Age & Gender Distribution*

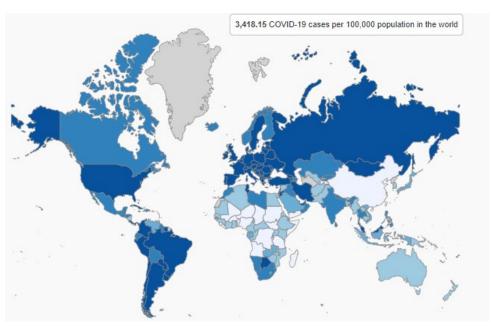
• Total COVID-19 cases in Canada by age group and gender, as of December 30, 2021.





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

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

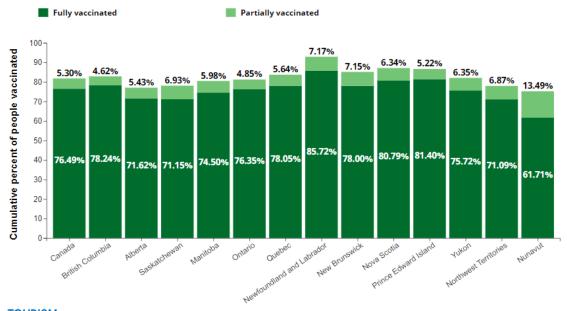






### Government of Canada – Percentage Fully Vaccinated

 The cumulative percent of the population fully vaccinated with a COVID-19 vaccine in Canada was 76.49% as of December 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 cumulate 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

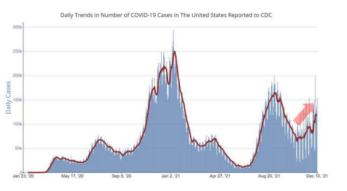
Findings as of December 14, 2021



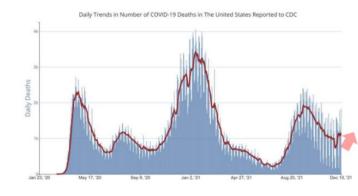
#### Destination Analysts: Current State of the Pandemic in the United States

#### Number of COVID-19 Cases in the USA

#### Number of COVID-19 Deaths in the USA



 December 10: The number of new COVID-19 cases in the US is rising.



 December 10: The number of COVID-19 related deaths in the US is rising.



#### Destination Analysts: US Travellers More Pessimistic About Return to 'Normal'

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



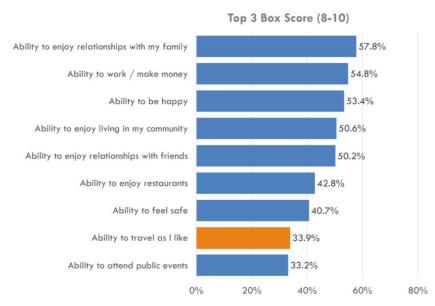
 The number of American travellers who say the US is half-way back to 'normal' in terms of resuming leisure activities is declining and was less than 41% in early December.



#### Destination Analysts: One-Third of US Travellers Say They Can Travel 'Normally'

Question: Now let's talk about how close (or far from) your life is to normal (i.e., being totally unaffected by the COVID-19 situation). For each, tell us about your life using the scale where 1 equals "Still very far from normal" and 10 equals "Already completely normal."

(Base: Wave 80 data. All respondents, 1,201 completed surveys. Data collected December 8-10, 2021)



 Only one-third of American travellers say they are able to travel as they would like to. In addition, only a minority also say that they feel safe, can enjoy restaurants, and are able to attend public events.



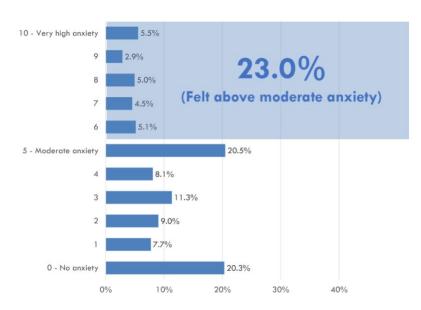
### Destination Analysts: Travellers Report Various Levels of COVID-19 Trip Anxiety

Question: While traveling on your most recent overnight trip, HOW

MUCH ANXIETY did you generally

feel about the COVID-19 situation?

(Base: Wave 80 data. Respondents who took an overnight trip in the past three months, 579 completed surveys. Data collected December 8-10, 2021)



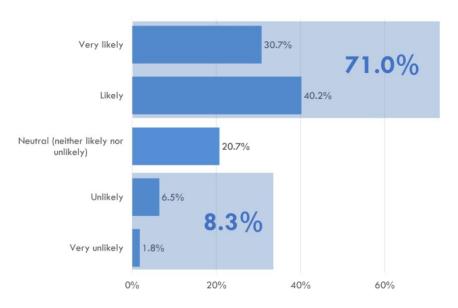
 About one-quarter of American travellers say they experienced high levels of COVID-19related anxiety on their most recent overnight trip. One in five felt moderate anxiety, and another one in five felt no anxiety at all.



#### Destination Analysts: Large Majority of US Travellers See Pandemic as Long-Term

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 80 data. All respondents, 1,201 completed surveys. Data collected December 8-10, 2021)



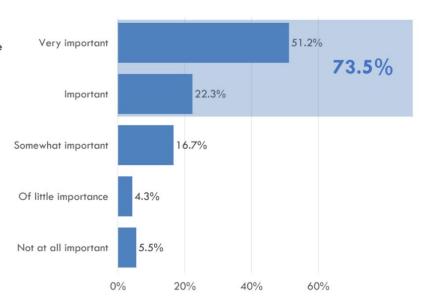
 Seven in 10 American travellers say it's likely that COVID-19 will affect their country for the next several years.



### Destination Analysts: Most US Travellers Want Ongoing COVID-19 Safety Protocols

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 80 data. All respondents, 1,201 completed surveys. Data collected December 8-10, 2021)

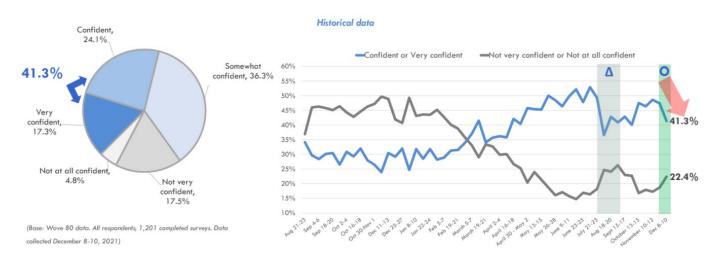


 Three-quarters of American travellers believe the destinations they visit should continue implementing careful COVID-19 safety practices. One-half of travellers say this is 'very important'.



### Destination Analysts: Omicron Triggers Drop in Confidence For Travelling Safely

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



 Only four in 10 American travellers are confident they can travel safely in the current environment – a decline (down from nearly 5 in 10) since the arrival of the Omicron variant in November



#### Destination Analysts: 'Excitement to Travel' Sentiment Falls With Omicron Variant

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)



 Although American sentiment about leisure travel over the next year remains positive, excitement to travel has fallen from 7.2 points (out of 10) in early November to 6.7 points in early December, largely as a result of the COVID-19 Omicron variant.



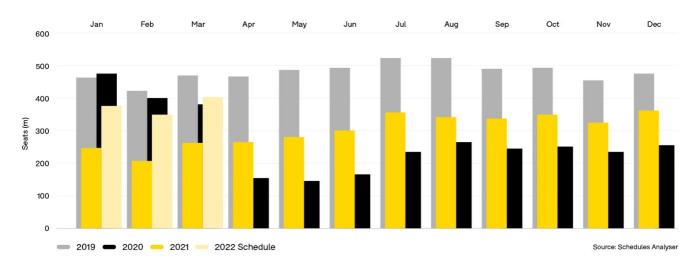
# OAG Official Aviation Guide Recovery Tracker

Updated to Week of December 21, 2021



## OAG – Global Airline Seat Capacity Likely To Show Strong Recovery in Early 2022

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



 Airline seat capacity, which rose slightly from November to December 2021, is projected to increase substantially in the first three months of 2022 and show significant gains compared with the same period in 2021.



### OAG – Airline Seat Capacity in Major Markets, Year-Over-Year Comparison

#### Year-Over-Year Comparison by month

Region	vs. Dec-19	vs. Dec-20	vs. Nov-21
Global	-24.3%	39.8%	9.7%
Australia	-40.7%	29.8%	76.5%
Brazil	-15.1%	38.0%	14.0%
China	-11.2%	-7.3%	12.5%
France	-22.8%	131.7%	7.2%
Germany	-39.8%	203.5%	-2.1%
India	-11.6%	40.2%	8.4%
Japan	-37.0%	10.0%	13.6%
Mexico	-0.6%	39.1%	11.8%
Singapore	-73.5%	119.9%	32.8%
South Africa	-40.7%	7.1%	6.0%
South Korea	-51.0%	2.3%	5.1%
Spain	-15.9%	156.2%	8.9%
UAE	-26.9%	98.2%	14.4%
United Kingdom	-34.2%	169.1%	13.7%
USA	-11.8%	55.2%	2.5%

#### Year-Over-Year Comparison by week

Region	23/12/2019	21/12/2020	13/12/2021
Global	-23.2%	34.6%	0.9%
Australia	-25.9%	39.9%	18.2%
Brazil	-13.8%	33.5%	-3.7%
China	-13.9%	-9.1%	0.8%
France	-18.9%	74.2%	-2.6%
Germany	-28.9%	178.0%	0.1%
India	-12.1%	33.7%	-0.3%
Japan	-38.6%	6.7%	3.9%
Mexico	-0.9%	33.7%	2.4%
Singapore	-72.9%	125.1%	2.7%
South Africa	-40.6%	7.6%	-3.0%
South Korea	-52.7%	-1.7%	-1.2%
Spain	-13.9%	138.3%	3.6%
UAE	-25.8%	90.5%	1.5%
United Kingdom	-30.5%	113.3%	-7.5%
USA	-10.3%	45.8%	0.1%

 Seat capacity remained higher the third week of December 2021 than the same week in 2020, although a slowdown was evident across major airline markets from the previous week of December 2021 (see blue box).



