

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.
- The **European Travel Commission (ETC)** (www.etc-corporate.org) is a non-profit tourism destination marketing organization for European countries.

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

- Since January Halifax has climbed from 10th place and **now ranks 8th as a destination city** – behind Quebec City, and ahead of Victoria – in a ranking of online search demand in February for travel to Canadian cities, according to Google Destination Insights.
- Statistics Canada’s preliminary counts of international travel in January show that arrivals into Canada by air and road were up in January 2022 over the same month in 2021, but remain **substantially down from the pre-pandemic months** of January 2020 and 2019.
- Statistics Canada’s Tourism Activity Tracker shows the country’s **combined tourism activity was 32% lower in November than the corresponding pre-pandemic month in 2019**. Nova Scotia’s combined tourism output was 36% below the province’s performance in November 2019. In both cases, the values are a slight improvement over the relative performances in October.

Summary

- The most recent Destination Canada Travel Recovery Assessment says 10 provinces and territories are in the ***Inter-provincial (IV) phase*** of recovery, while Newfoundland and Labrador and Nunavut have each regressed to the ***Hyper-Local (II) phase***, and PEI has moved back to the ***Intra-provincial (III) phase***.
- Destination Canada's Resident Sentiment survey shows that **Canadians' attitudes toward travel** – including the perceived safety of travel, welcoming attitudes toward visitors, and comfort with leisure activities – **are rebounding sharply in February** from the declines in sentiment seen during the COVID-19 Omicron wave of recent months.
- The federal government reports that the **number of active COVID-19 cases in Canada decreased** from 299,000 in late January to 120,000 in late February, and the **rate of active cases fell** from 781 to 335 per 100,000 population over the same period.

Summary

- Destination Analysts reports that both **confidence about the direction of the pandemic and excitement to travel are surging among US travellers** in the wake of the COVID-19 Omicron wave. However, US traveller interest in international trips, at least in the short term, remains weak.
- A snapshot of European travel plans in the first six months of 2022 shows that a majority of the residents in Europe's largest countries intend to travel in the coming months, but that **only 7%-18% of residents intend to travel outside Europe itself**, according to the European Travel Commission.
- The Official Aviation Guide (OAG) says that global airline seat capacity is currently **24% below the pre-pandemic level of the same period in 2019**, and is forecast to rise over the next three months.

Google Destination Insights

As of February 14, 2022

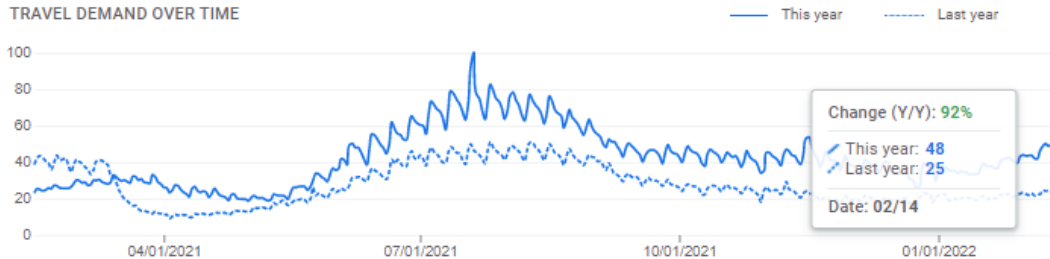
Google Destination Insights: Online *Domestic* Travel Interest in Canada

- 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 Jan. 14, 2022 to Feb. 14, 2022



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



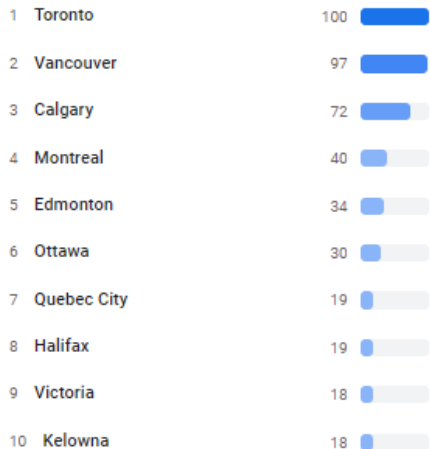
12-month international demand, Feb. 14, 2021 to Feb. 14, 2022



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 **Jan. 14, 2022 to Feb. 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 **Jan. 14, 2022 to Feb. 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, **Jan. 14, 2022 to Feb. 14, 2022**. Countries are scored by search volume, on an index of 0-100, with 100 being the highest indexed volume over the period.

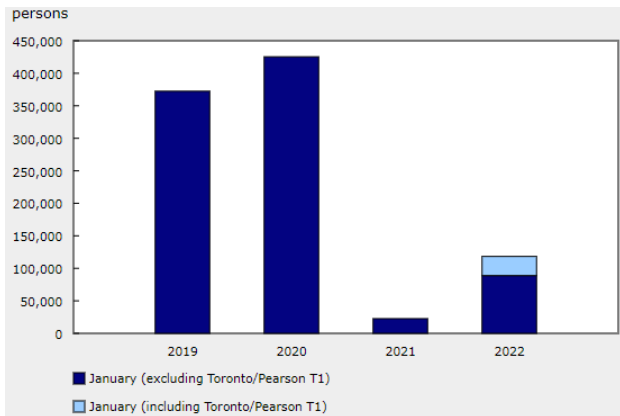


Statistics Canada: International Arrivals – Preliminary Counts, January 2022

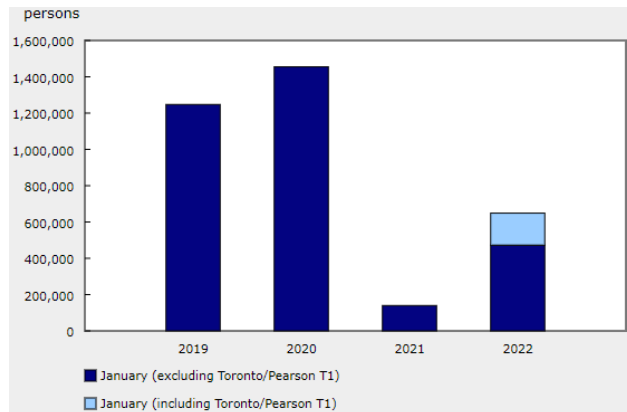
Released February 11, 2022

Statistics Canada: International *Air* Arrivals in January

Non-resident



Canadians



- **Non-residents** arriving at Canadian airports:

January 2019 – 372,000
 January 2021 – 23,000
 January 2022 – 89,000

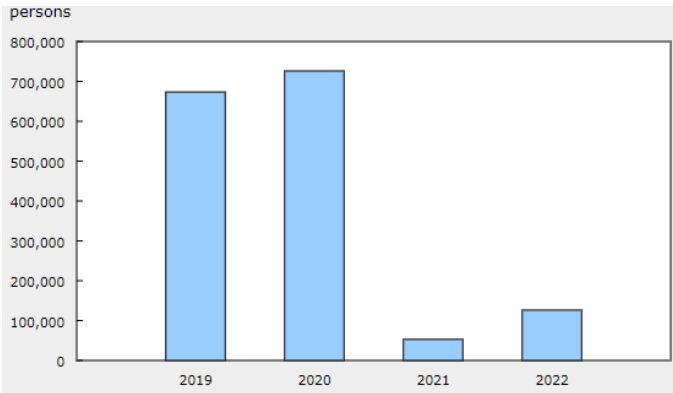
- **Canadians** arriving at Canadian airports:

January 2019 – 1.2 million
 January 2021 – 140,000
 January 2022 – 473,000

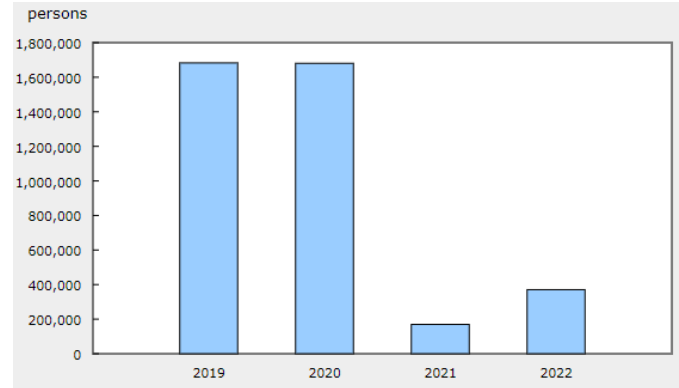
- **Air arrivals were up in January 2022** over January 2021, but remained down substantially from the same pre-pandemic months in 2020 and 2019.

Statistics Canada: International *Road* Arrivals in January

US residents



Canadians



- **US residents** arriving in Canada by road:

January 2019 – 673,000

January 2021 – 53,000

January 2022– 126,000

- **Canadians** arriving in Canada by road:

January 2019 – 1.7 million

January 2021 – 170,000

January 2022– 371,000

- **Road arrivals were up in January 2022** over January 2021, but remained down substantially from the same pre-pandemic months in 2020 and 2019.

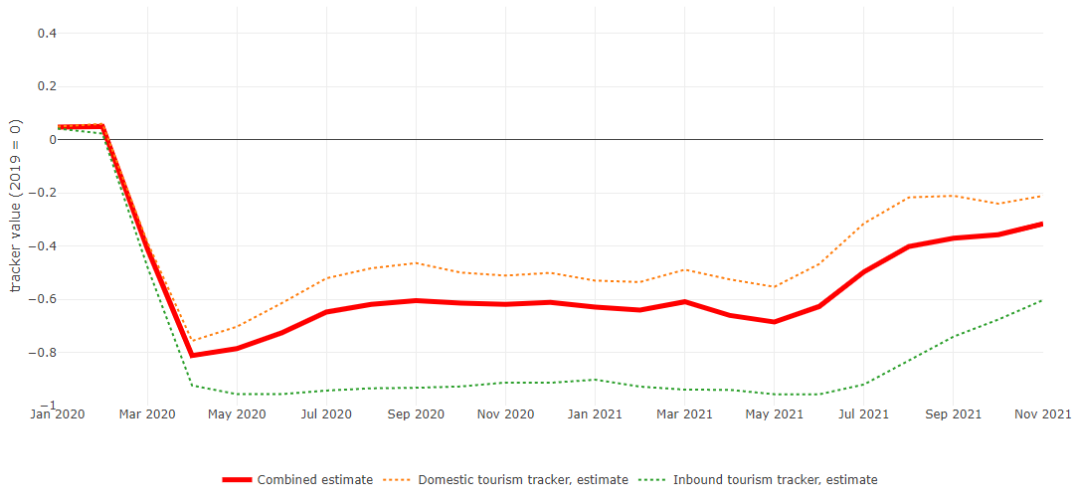
Statistics Canada: Canadian Tourism Activity Index

Updated to November 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.

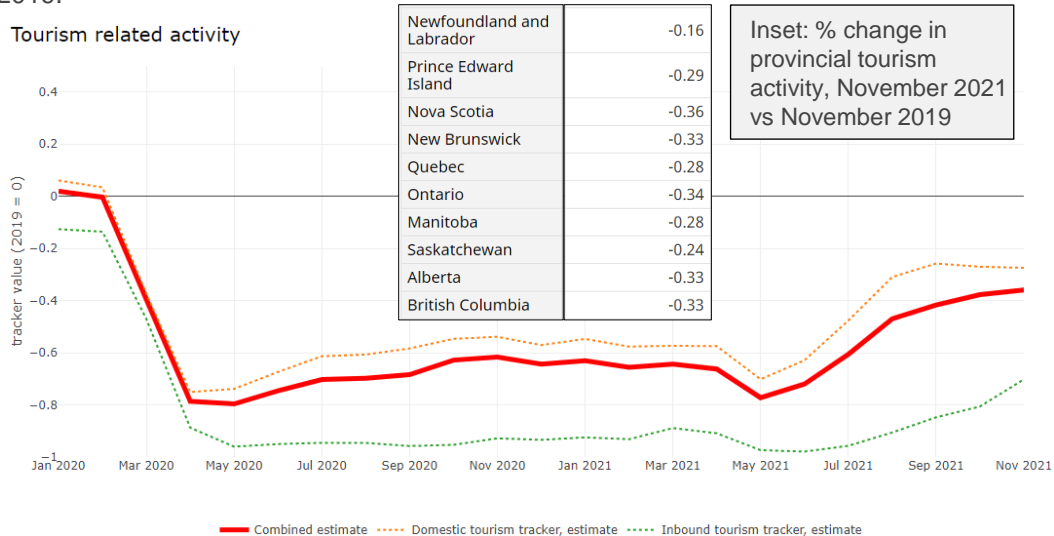
Tourism related activity



- In **November 2021**, combined tourism activity in **Canada** was **32% below** the level in November 2019, which is a small improvement from the index level in October 2021 (-36%). This was mostly 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 **November 2021**, combined tourism activity in **Nova Scotia** was **36% below** the level in November 2019, a slight improvement from October 2021 (-38%). Nova Scotia's November decline is greater than the national decline (-32%), and is the highest decline in November among all the provinces (see inset).

Destination Canada: Travel Recovery Assessment

Updated to February 1, 2022

Destination Canada Provincial Travel Recovery Assessment

Timeline of overall assessment for each province and territory:

	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	11-Jan	18-Jan	25-Jan	01-Feb
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	V	V	V	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	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	V	V	V	V	IV	III	III	III	III
Newfoundland & Labrador	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	II	II	II	II
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	II	II	II

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 **February 1, 2022**:

- Ten provinces and territories, including Nova Scotia, are in the **Inter-provincial (IV)** phase of recovery.
- In January, Prince Edward Island regressed from phase **IV** into the **Intra-provincial (III)** phase.
- In January, Newfoundland and Labrador and Nunavut regressed from phase **IV** into **the Hyper-Local (II)** phase.

Destination Canada: Resident Sentiment Survey

Updated data to week of February 15, 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	89	88	79	81	82	92	93	91
Communities in my province	81	83	77	76	81	87	87	86
Other provinces in Canada	58	70	64	63	73	55	47	59
The United States	32	48	42	34	46	29	18	36
Other countries	32	35	36	30	39	24	16	28
SAMPLE SIZE	210	204	203	607	413	201	132	69

- % Somewhat / Strongly Agree.
- Note: red/green text indicates a significant difference between regions.
- Results from week of February 15, 2022.

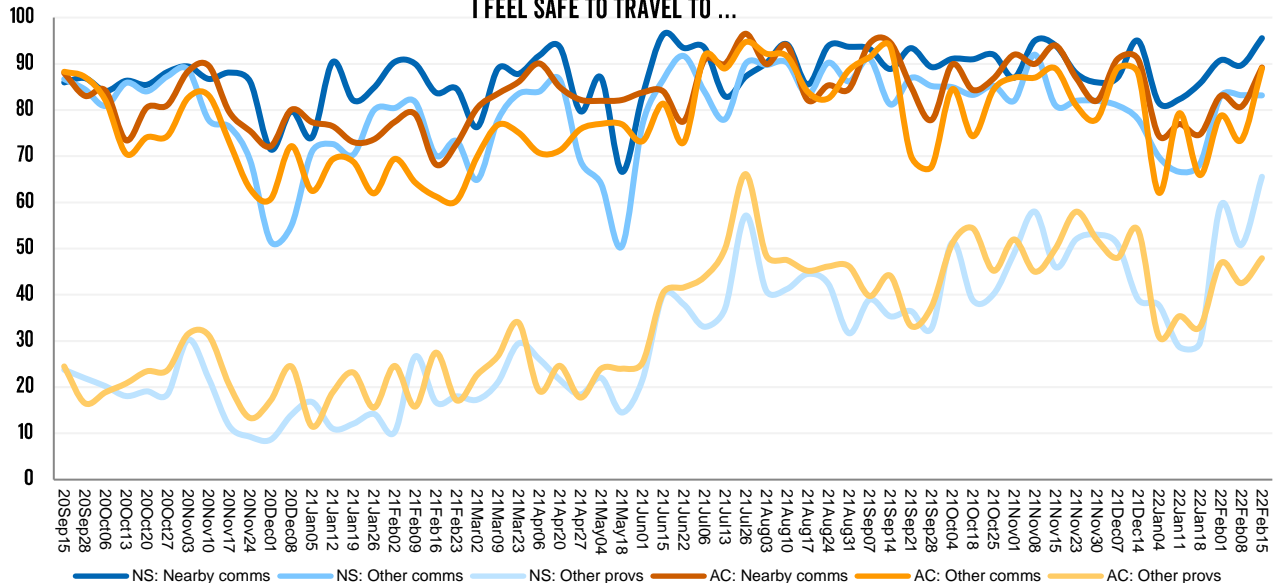
Destination Canada Resident Sentiment – Safety of Travel

- A large majority of Canadians report feeling safe travelling *to nearby communities and elsewhere in their own provinces*.
- A substantial minority in most regions feel safe travelling *internationally*.
- After the steep declines through December and January, comfort with travel, particularly *domestically*, has rebounded substantially across all regions of the country.
- More than half of Canadians in all regions – and 63% of Ontarians – would feel safe travelling to *other provinces*.
- Atlantic Canadians' feelings of safety travelling *within their own province* has rebounded and is again the highest in the country. However, their comfort level with travel *elsewhere in the country* (55% feel safe going to other provinces), or *internationally*, has remained significantly behind the sentiment in most other regions.

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

ATLANTIC CANADIANS (EXCLUDING NS) VS NOVA SCOTIANS

I FEEL SAFE TO TRAVEL TO ...



- Among both Nova Scotians and Atlantic Canadians, feelings of safety for travel have rebounded after declining through the COVID-19 Omicron wave. In particular, a solid majority of Nova Scotians now expresses comfort with travel to other provinces.

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	71	77	77	70	74	69	82	64
Communities in my province	71	76	72	63	76	67	71	66
Other provinces in Canada	54	71	67	54	66	46	38	51
The United States	27	49	46	33	42	22	17	26
Other countries	26	43	39	31	37	24	17	28
SAMPLE SIZE	206	211	200	606	419	204	134	69

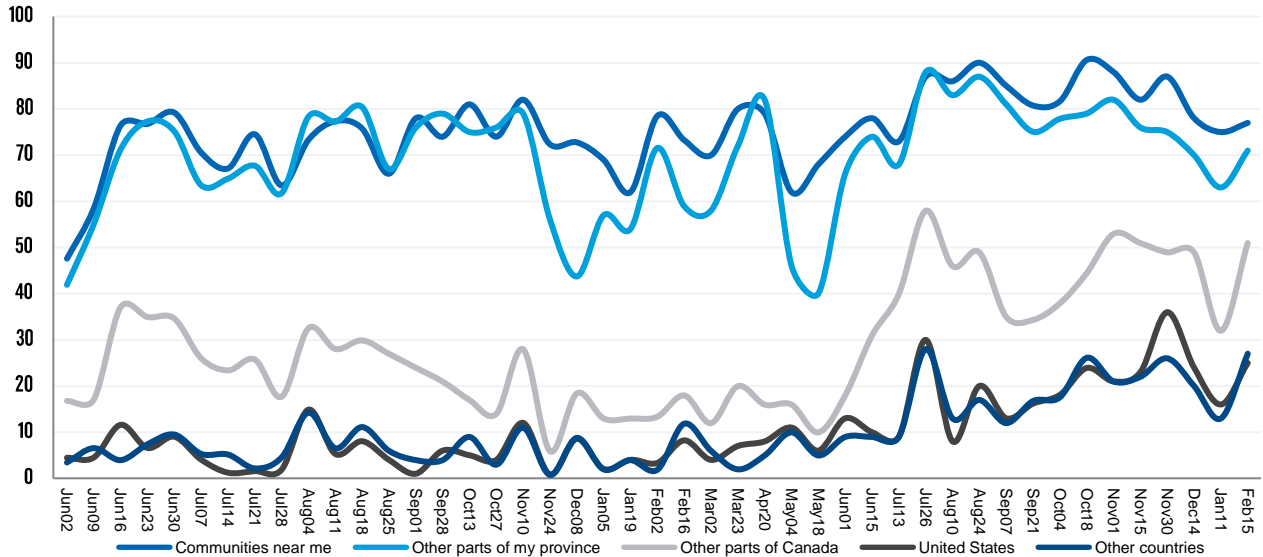
- % Somewhat / Strongly Agree.
- Note: red/green text indicates a significant difference between regions.
- Results from week of February 8, 2021.

Destination Canada Resident Sentiment – Welcoming Visitors

- A majority of Canadians in all regions are willing to welcome visitors from *within their own province*.
- After the significant declines in welcoming sentiment across all regions through December and January, a general rebound is apparent in most regions.
- About half of residents in Atlantic Canada, Ontario, and British Columbia are willing to welcome visitors from *other parts of the country*, while about two-thirds of those in the remaining regions would be willing to do so. Welcoming sentiment in Atlantic Canada is actually the weakest in the country, with only 46% wanting visitors from other provinces.
- Canadians remain generally negative about welcoming *international* visitors, though there are substantial regional differences. Atlantic Canadians are the most negative, with only about one-quarter willing to welcome these visitors, while Alberta residents are the most positive, with nearly half willing to do so.

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 has generally rebounded following the 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	+49	+51	+44	+45	+57	+55	+60	+54
Communities in my province	+43	+49	+44	+41	+56	+48	+50	+47
Other provinces in Canada	+27	+38	+39	+33	+46	+23	+15	+27
The United States	-5	+12	+6	0	+19	-22	-26	-19
Other countries	-2	+3	+11	-1	+21	-30	-35	-29
SAMPLE SIZE	210	204	203	607	413	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 February 15, 2022.

Destination Canada Resident Sentiment – Promoting Home Community to Visitors

- After the substantial declines in sentiment among Atlantic Canadians in December and January, attitudes have begun to rebound, particularly with respect to having their communities promoted *domestically*.
- 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*.
- In addition, residents in all regions are now solidly positive when it comes to having their communities advertised to visitors from *other parts of the country* – although it should be noted that Atlantic Canadians express the weakest sentiment of all the regions, with a net-positive score of +23.
- Atlantic Canada is the only region still entirely negative with respect to having their communities advertised to *international* visitors, while residents in the remaining regions are now neutral or slightly positive about the idea.

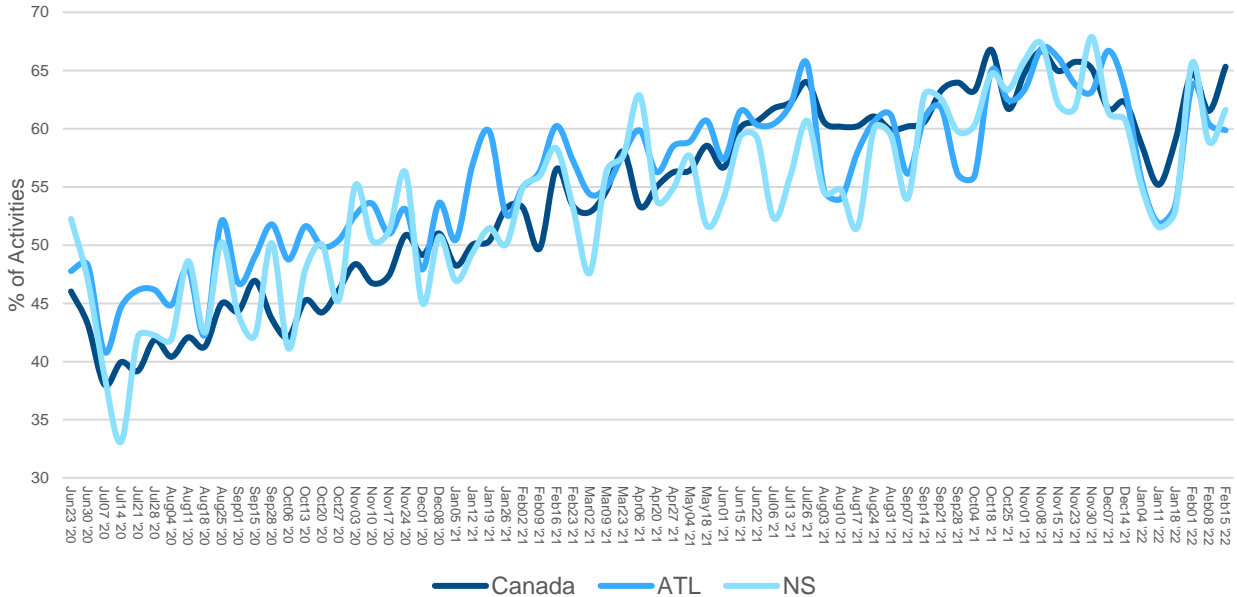
Destination Canada – Comfort With Activities, Most/Least Comfortable

- ‘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	84	82	91
Shopping at the mall	82	72	82
Going back to your workplace/office	78	81	90
Dining in restaurants	77	72	76
Activities least comfortable with:			
Flying on an airplane	55	47	48
Travelling to the United States	51	40	37
Going to bars, lounges, night clubs, pubs	49	47	51
Large gatherings such as sporting events, concerts, or festivals	48	39	43
SAMPLE SIZE	1838	201	94

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

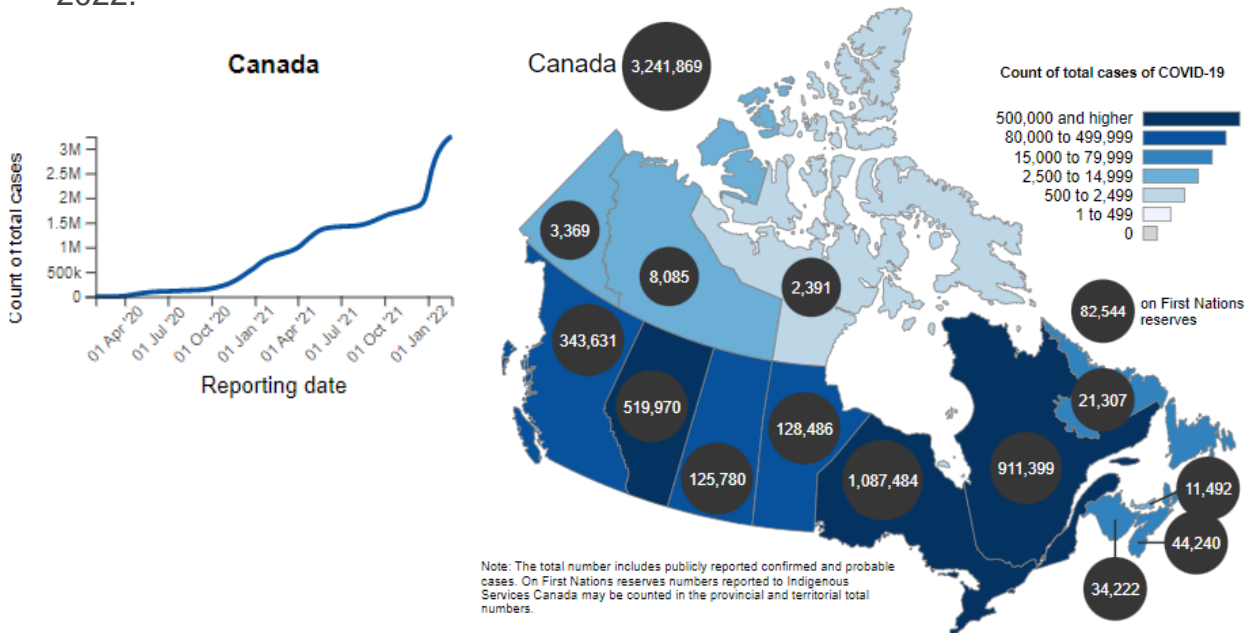
- The overall percentage of activities that Canadians are comfortable with appears to be rebounding following the decline seen in December and January.
- Among those activities Canadians are least comfortable with, about half express comfort with *flying on an airplane, travelling to the United States, and going to bars and pubs*. The least popular activity among Canadians is *attending large public gatherings*, with only 48% saying they are comfortable doing this.
- Atlantic Canadians continue to lag behind other Canadians in their willingness to take part in many activities, particularly *shopping at a mall, going to the gym, using public transit, flying on an airplane, travelling to the United States, and attending large public gatherings*.

Government of Canada COVID-19 Status

As of February 20, 2022

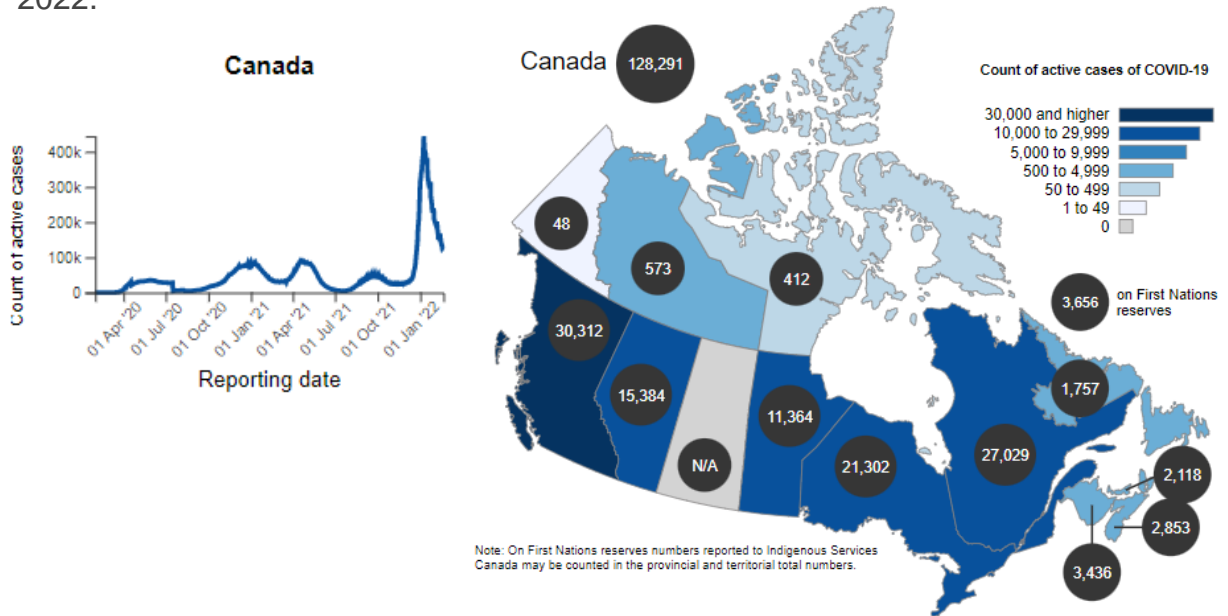
Government of Canada – COVID-19 Count of *Total* Cases

- The count of total cases of COVID-19 in **Canada** was **3,241,869** as of February 20, 2022.



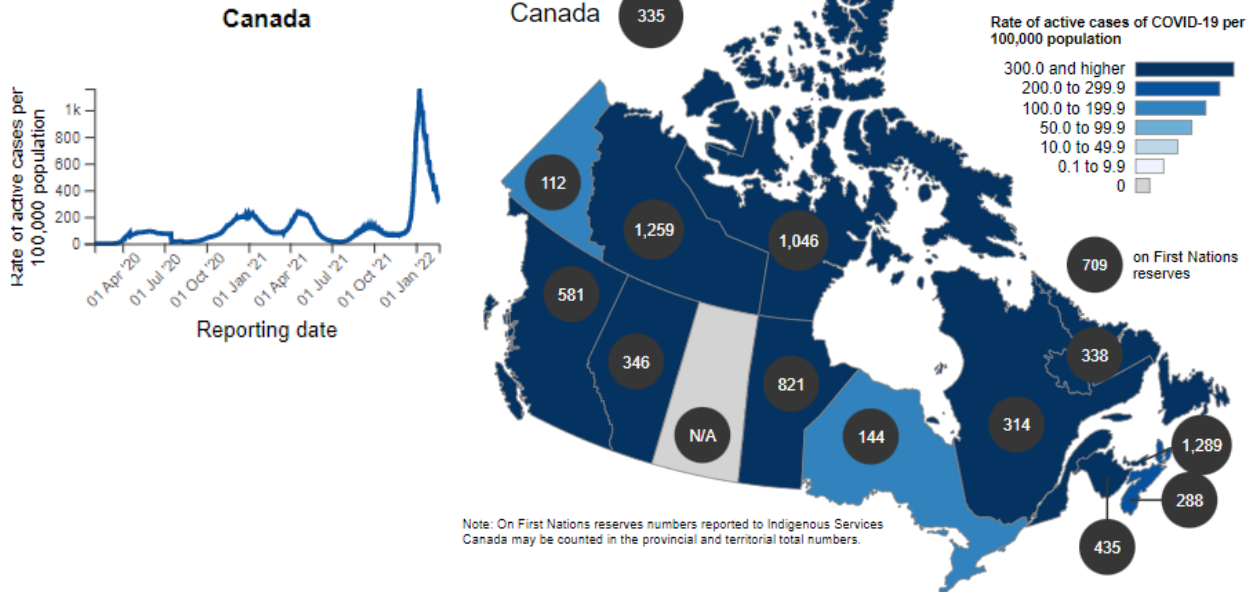
Government of Canada – COVID-19 Count of *Active* Cases

- The count of active cases of COVID-19 in **Canada** was **128,291** as of February 20, 2022.



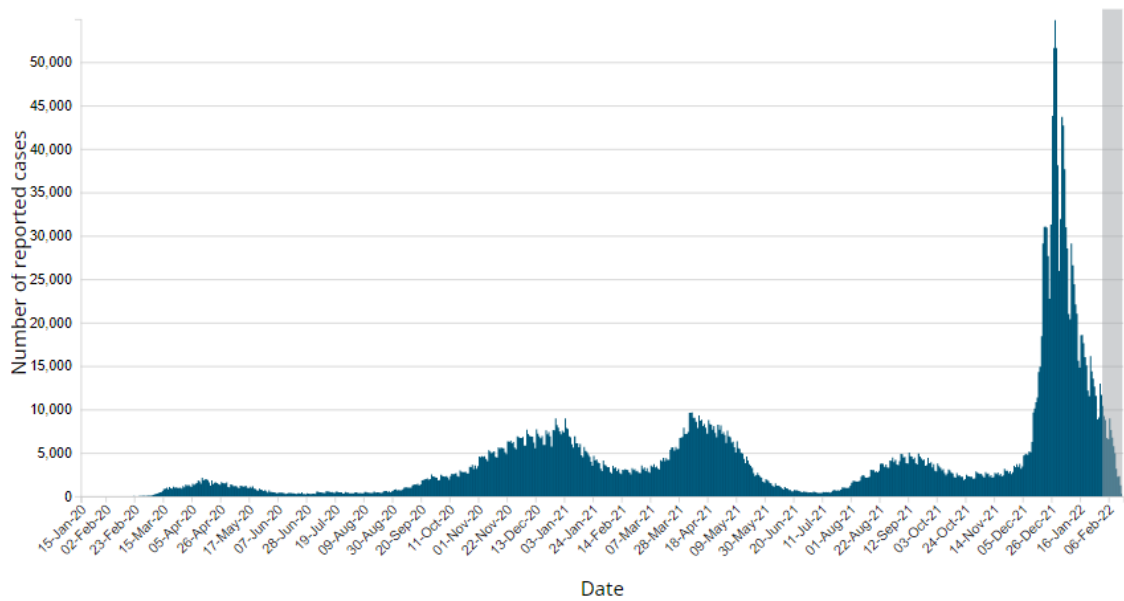
Government of Canada – COVID-19 Rate of Active Cases

- The rate of active cases of COVID-19 in **Canada** was **335 per 100,000 population** as of February 20, 2022.



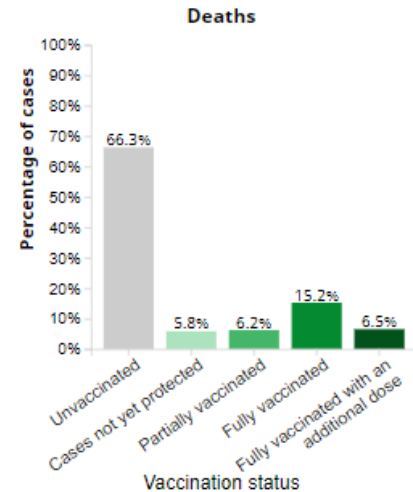
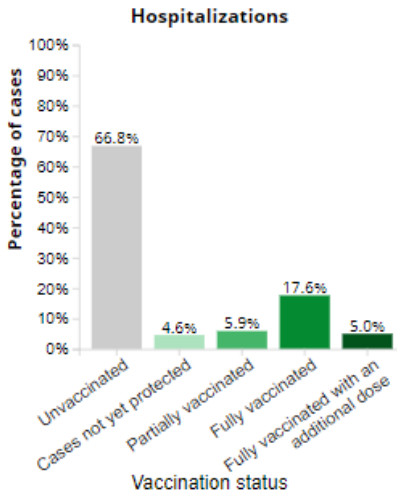
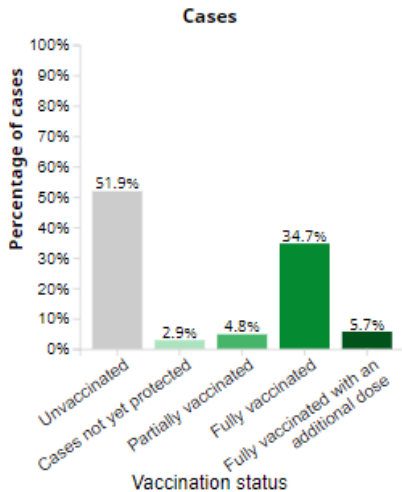
Government of Canada – COVID-19 Cases by *Date* (Epidemic Curve)

- Total COVID-19 cases in Canada (n=3,142,776) by date of illness onset, as of February 18, 2022.



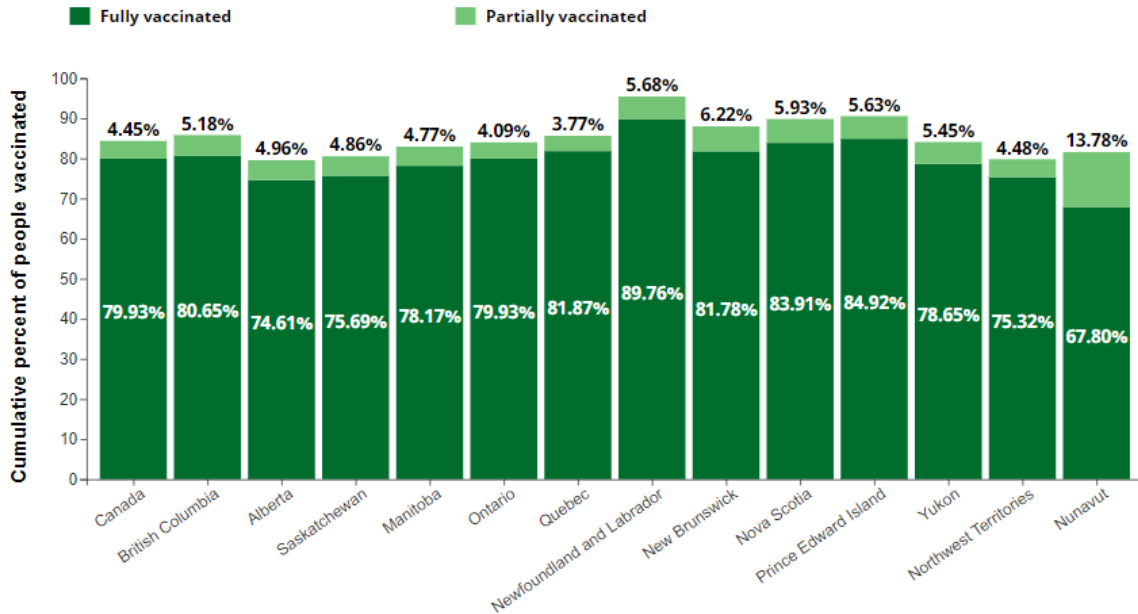
Government of Canada – COVID-19 Cases by *Vaccination Status*

- Percentage of COVID-19 cases in Canada by vaccination status, as of January 30, 2022.



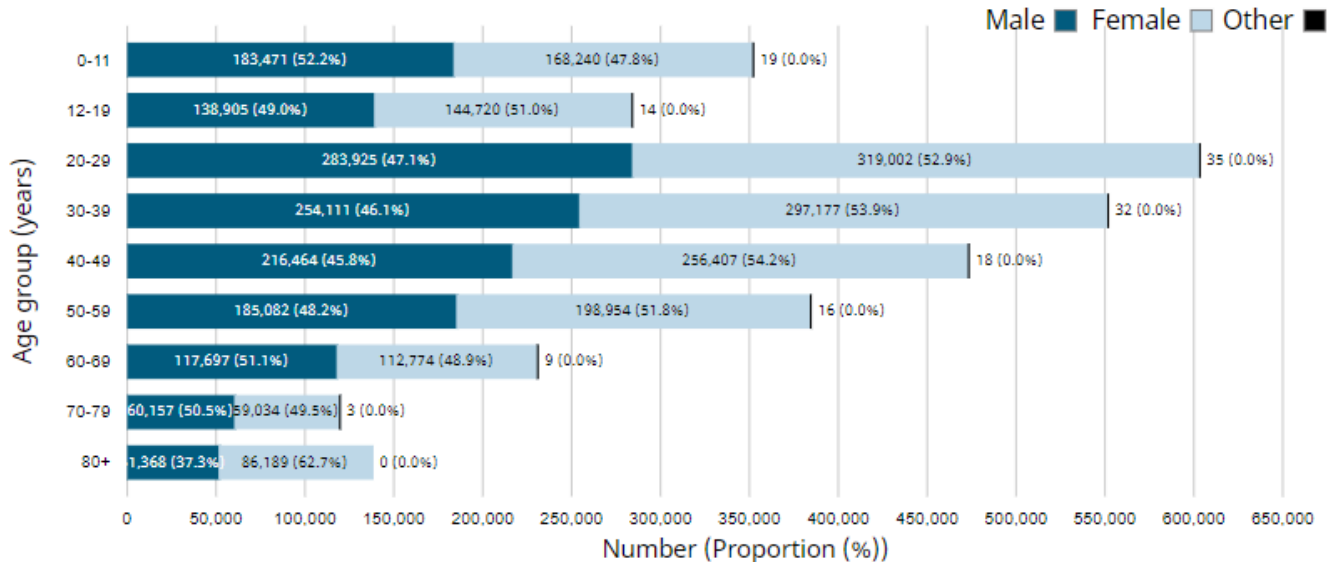
Government of Canada – Percentage Fully Vaccinated

- The cumulative percent of the population **fully vaccinated** with a COVID-19 vaccine in Canada was **79.93%** as of February 13, 2022.



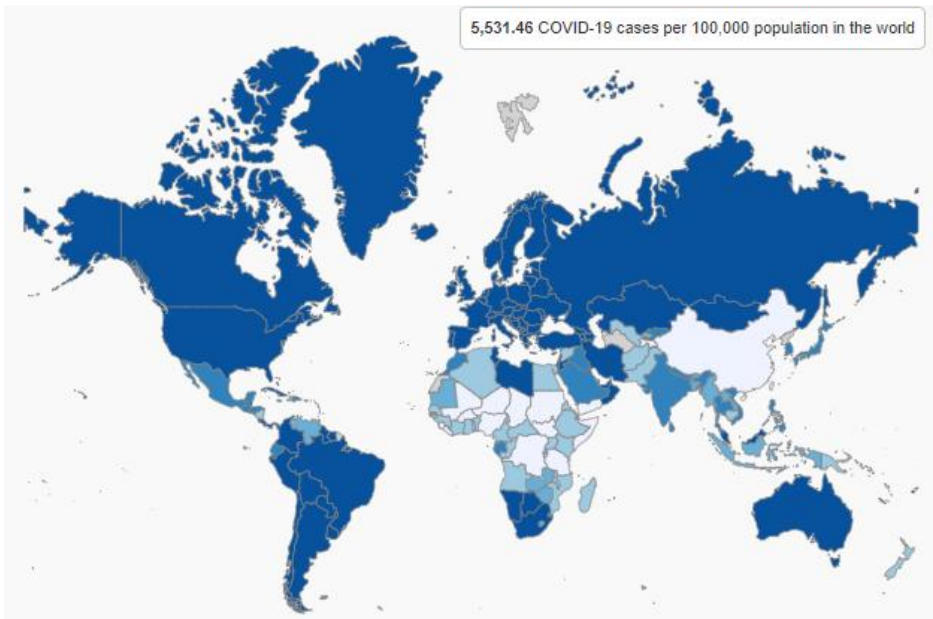
Government of Canada – COVID-19 Cases by Age & Gender Distribution

- Total COVID-19 cases in Canada by age group and gender, as of February 13, 2022.

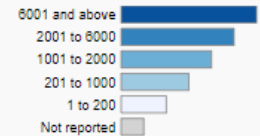


Government of Canada – COVID-19 World Cases, by Country

- Number of COVID-19 cases per 100,000 people, by country, on February 20, 2022.

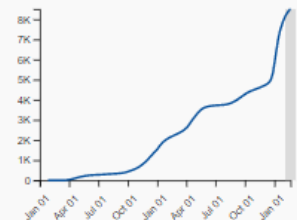


Number of cases per 100,000 population of COVID-19



Canada

8,507.49 COVID-19 cases per 100,000 population as of February 20th, 2022.



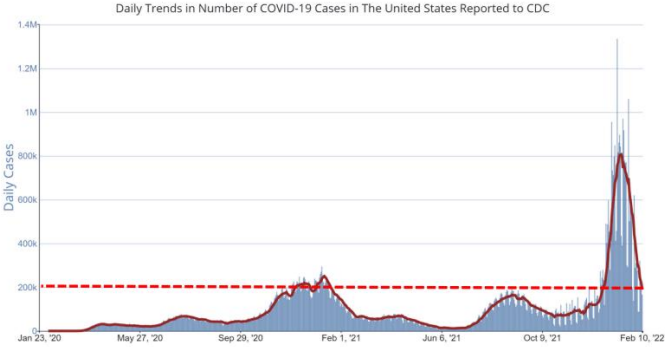
Nova Scotia COVID-19 Cases

- 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 February 15, 2022

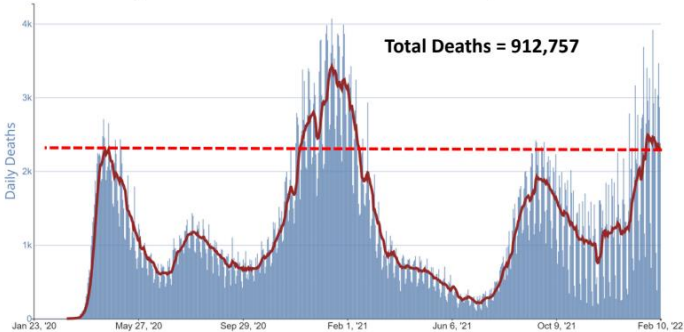
Destination Analysts: Current State of the Pandemic in the United States



- February 10, 2022: The number of new COVID-19 cases in the US is falling.

- February 10, 2022: The daily number of COVID-19 related deaths in the US is falling.

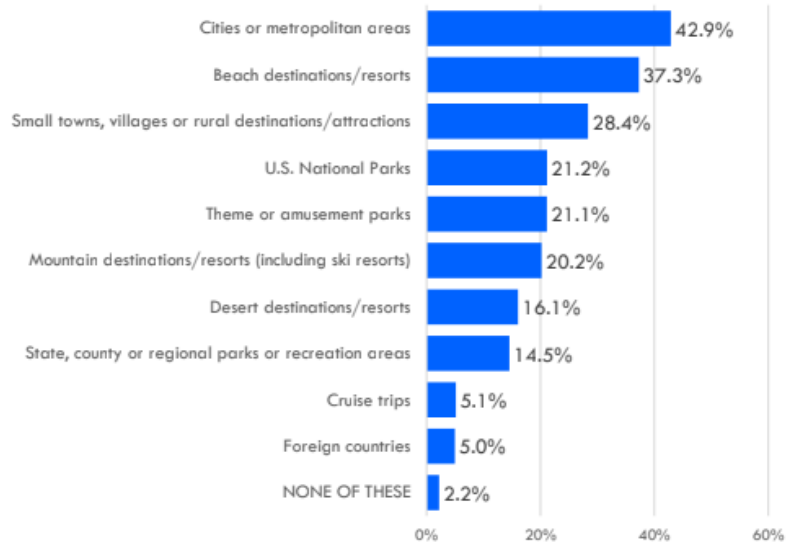
Daily Trends in Number of COVID-19 Deaths in The United States Reported to CDC



Destination Analysts: US Spring Break Travellers Avoiding Foreign Countries

Question: Which of these destination types will you be likely to visit on your Spring Break trip? (Select all that apply)

(Base: Wave 84 data. Respondents who plan to travel for Spring Break 2022, 166 completed surveys. Data collected February 9-11, 2022)



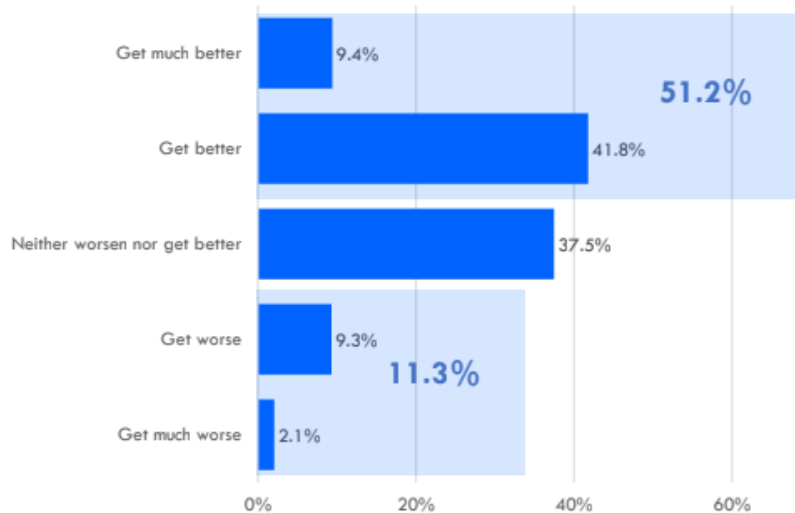
- Among US travellers planning Spring Break trips, the most popular destinations are cities and beach/resort locations. The least popular are cruises and foreign countries.

Destination Analysts: US Travellers More Optimistic On Pandemic Outlook

Question: In the NEXT MONTH, how (if at all) do you expect the severity of the coronavirus situation in the United States to change? (Select one)

In the next month the coronavirus situation will

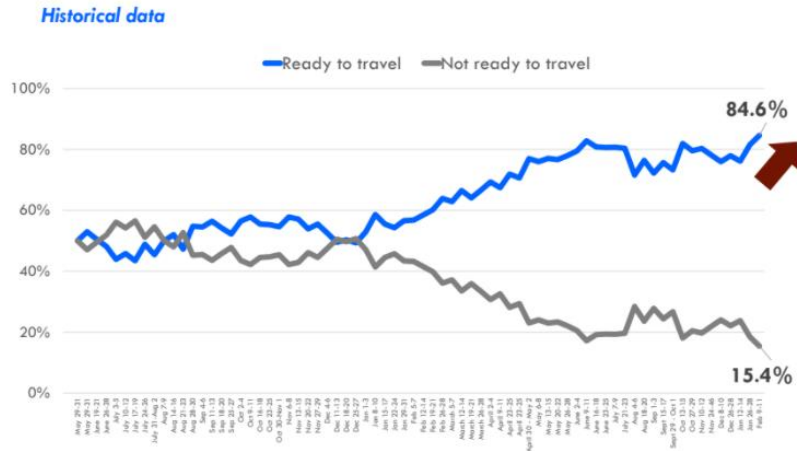
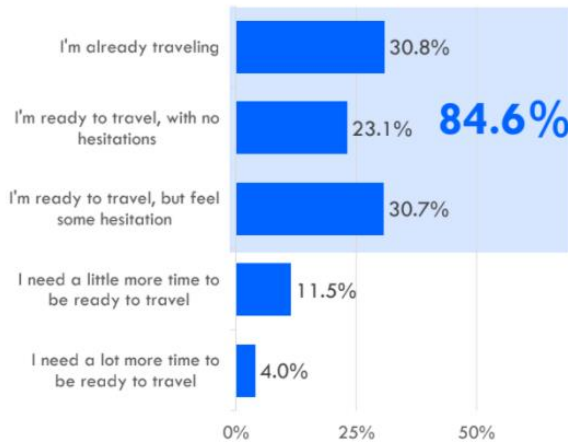
(Base: Wave 84 data. All respondents, 1,208 completed surveys. Data collected February 9-11, 2022)



- One-half (51%) of US travellers expect the COVID-19 situation to improve over the next month – up from only 20% at Christmas who expected the situation to improve. Four in 10 expect the situation to remain the same, and only one in 10 expect it to worsen.

Destination Analysts: Rising Number of Americans in Travel-Ready State of Mind

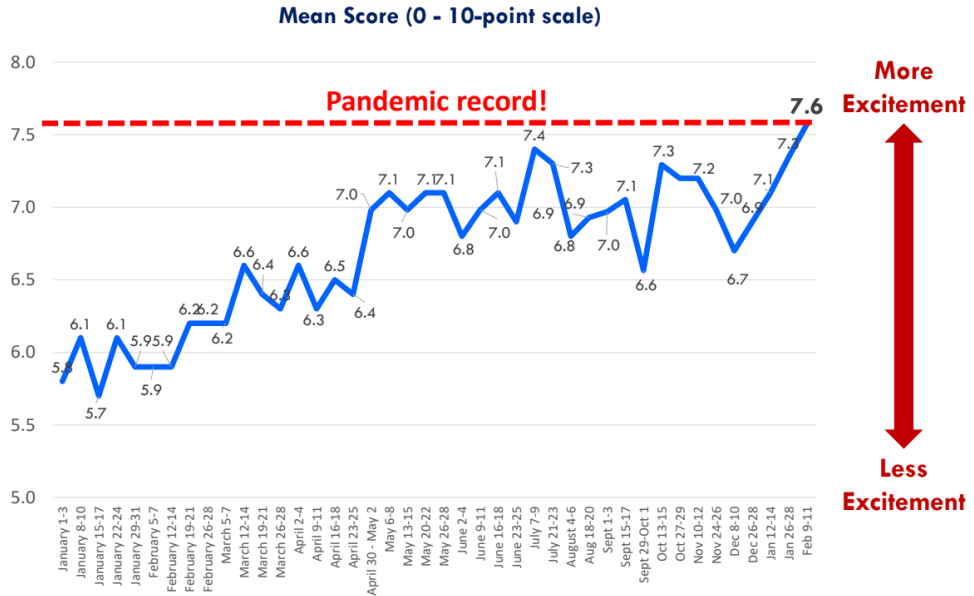
Question: When it comes to getting back out and traveling again, which best describes your current state of mind? (Select one)



- The vast majority of US travellers say they're either already taking trips (31%) or are ready to travel again (54%). The number of people expressing interest in travel is on the rise again after several months of decline, following the arrival of the COVID-19 Omicron variant.

Destination Analysts: Excitement About Leisure Travel At Record High

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)



- Excitement about leisure travel in the next 12 months has reached its highest point since the question was first asked a year ago. On a scale of 0 (least excited) to 10 (most excited), the mean score for American travellers hit a record 7.6 points in mid-February.

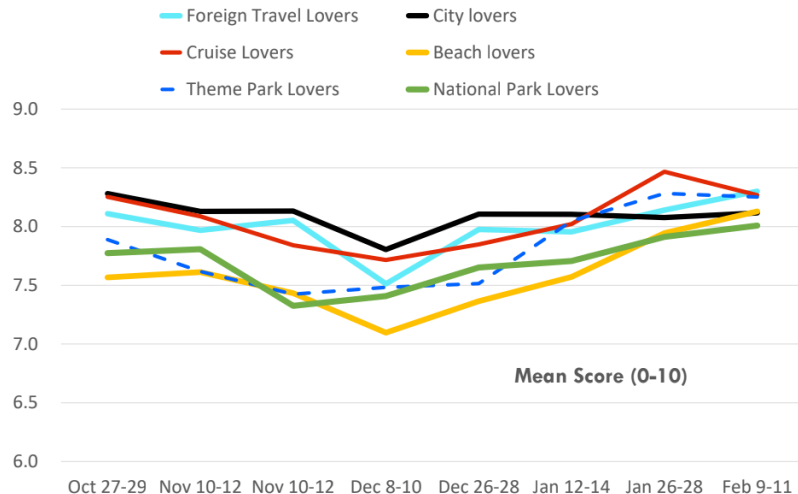
Destination Analysts: Excitement Rising For Some Traveller Types, But Not All

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)

More
Excitement



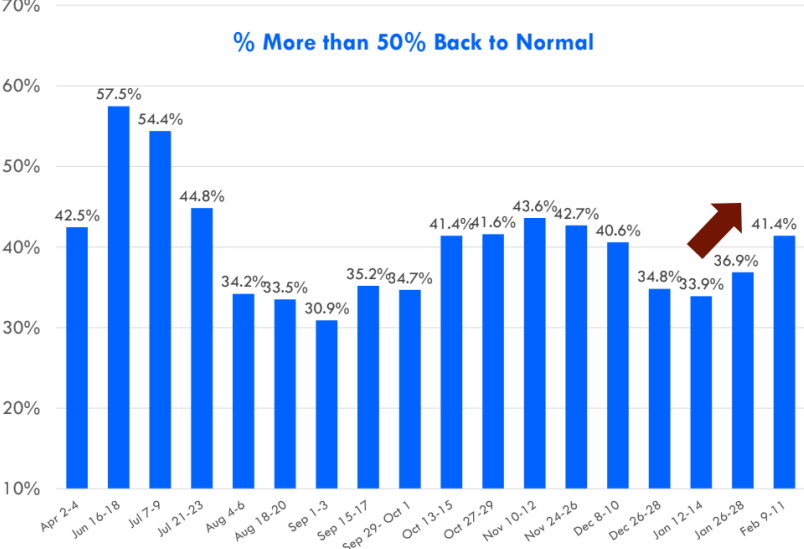
Less
Excitement



- Excitement about leisure travel is climbing for some US traveller groups including those who love beaches, national parks, and visiting foreign countries. It is static or declining, however, among those who love cruises and going to theme parks.

Destination Analysts: Strong Minority Say US is More Than 50% Back to 'Normal'

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

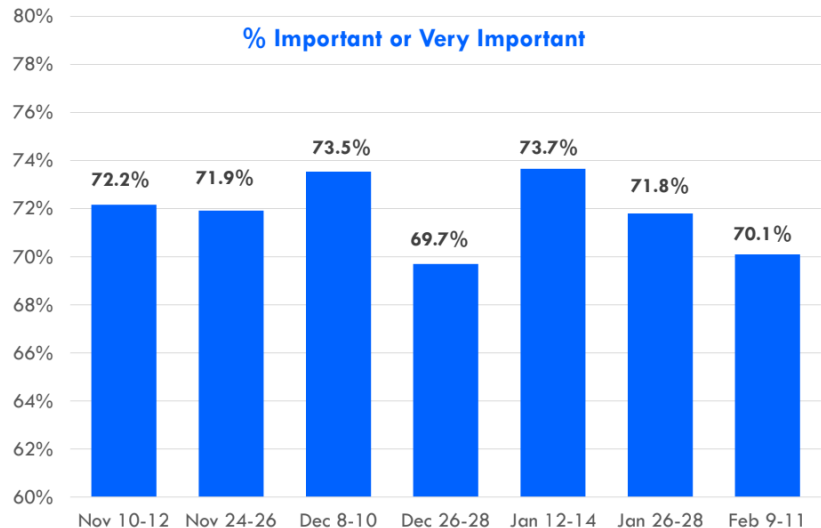


- Four in 10 American travellers believe the US is more than half-way back to being normal in terms of the resumption of leisure activities. While there has been steady improvement in this perception since mid-January, the number is still well below what it was in the summer, before the arrival of the COVID-19 Omicron variant.

Destination Analysts: Most US Travellers Want Ongoing Pandemic 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 84 data. All respondents, 1,208 completed surveys. Data collected February 9-11, 2022)



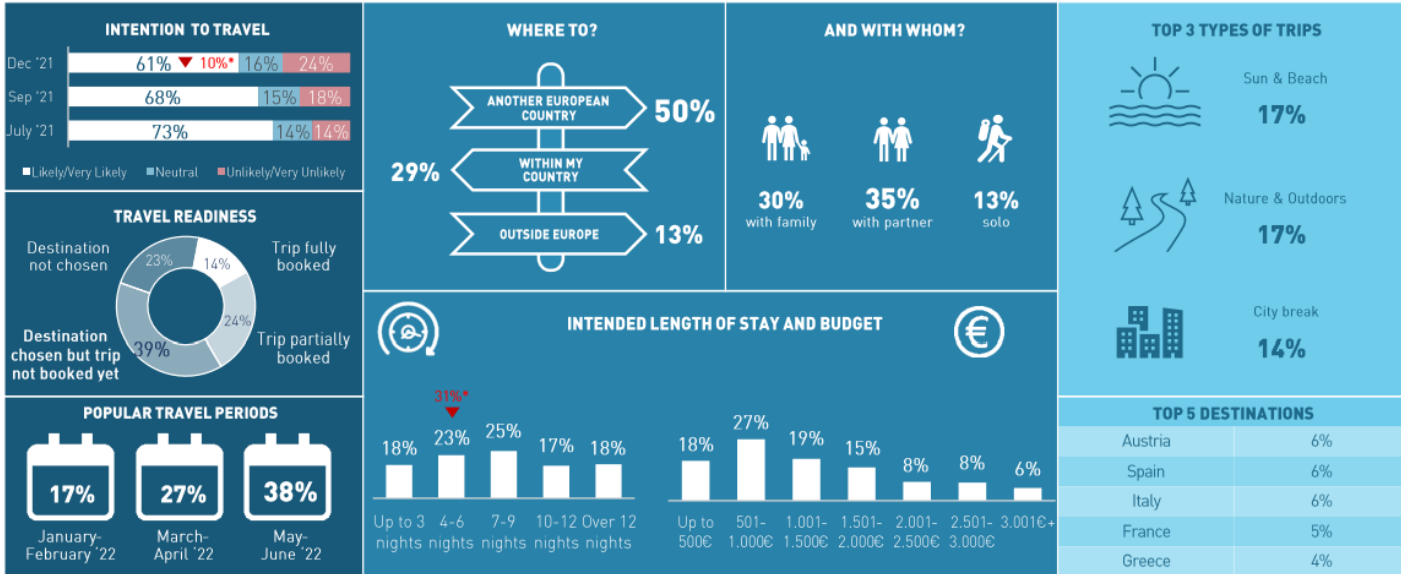
- A substantial majority of US travellers (seven in 10) say it is important for destinations to continue implementing COVID-19 safety protocols and practices.

European Travel Commission Survey

Snapshot of early-2022 Travel Plans for Select
Countries (Germany, Britain, France, Italy)

Published February 2, 2022

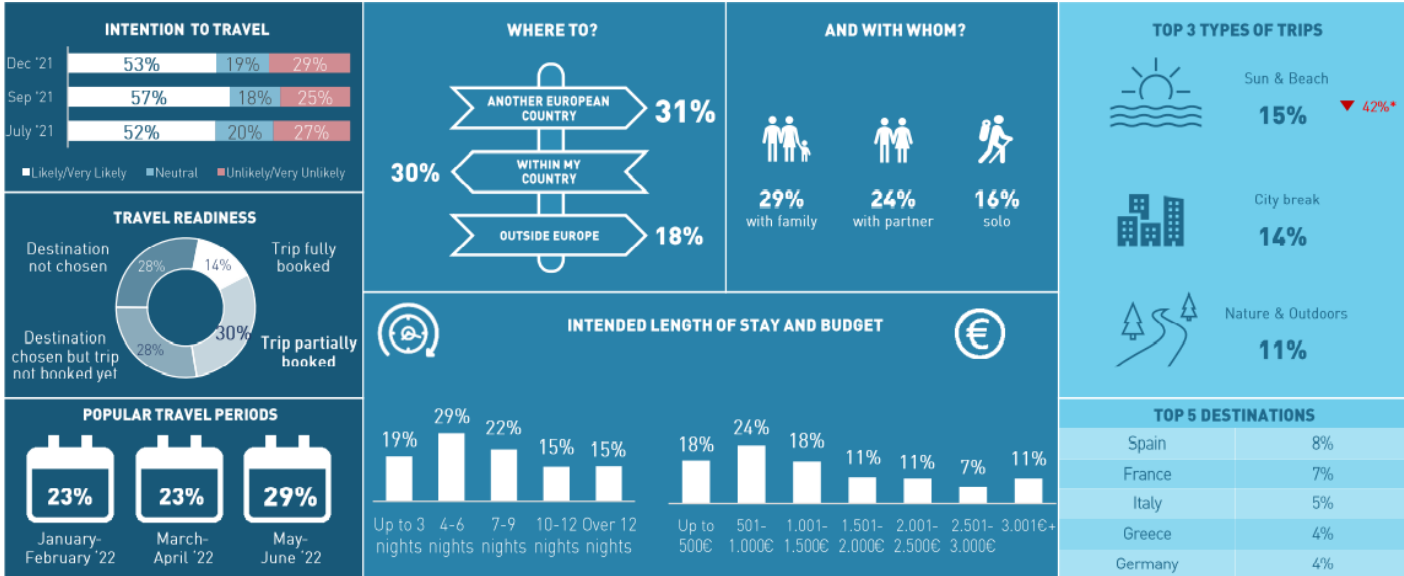
European Travel Commission: *German* Travel Intentions, January-June 2022



- Six in 10 Germans are likely to travel in the first six months of 2022, with **13% of those intending to travel to international destinations outside Europe.**

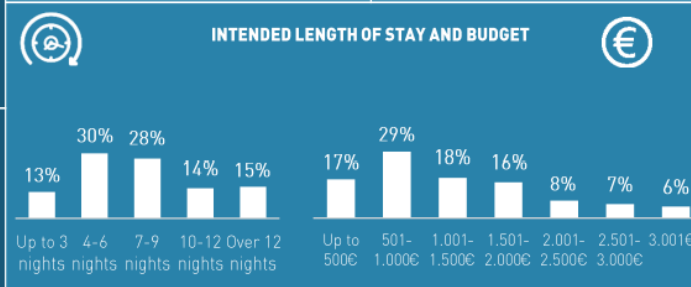
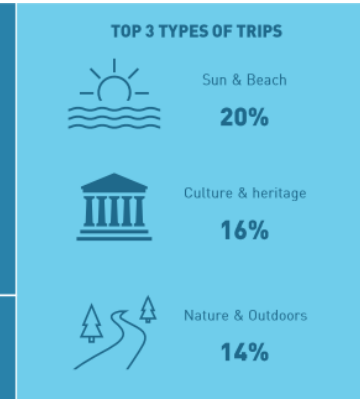
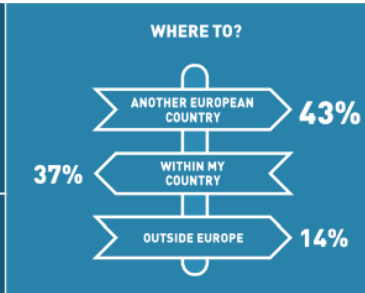
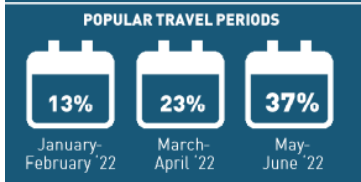
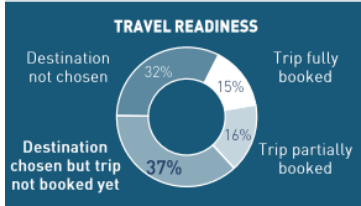
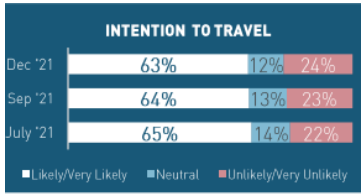


European Travel Commission: *British* Travel Intentions, January-June 2022



- At least five in 10 British residents are likely to travel in the first six months of 2022, with **18% of those intending to travel to international destinations outside Europe.**

European Travel Commission: *French* Travel Intentions, January-June 2022

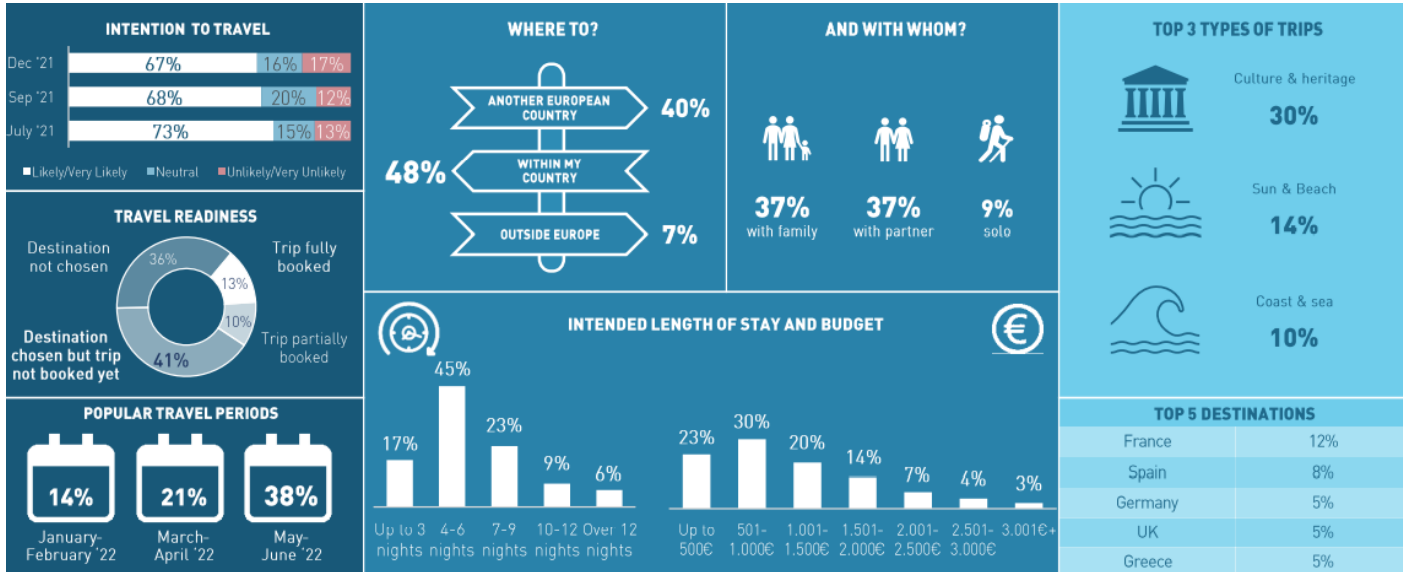


TOP 5 DESTINATIONS

Spain	10%
Italy	10%
Portugal	7%
Greece	6%
Croatia	4%

- Six in 10 French residents are likely to travel in the first six months of 2022, with **14%** of those intending to travel to international destinations outside Europe.

European Travel Commission: *Italian* Travel Intentions, January-June 2022



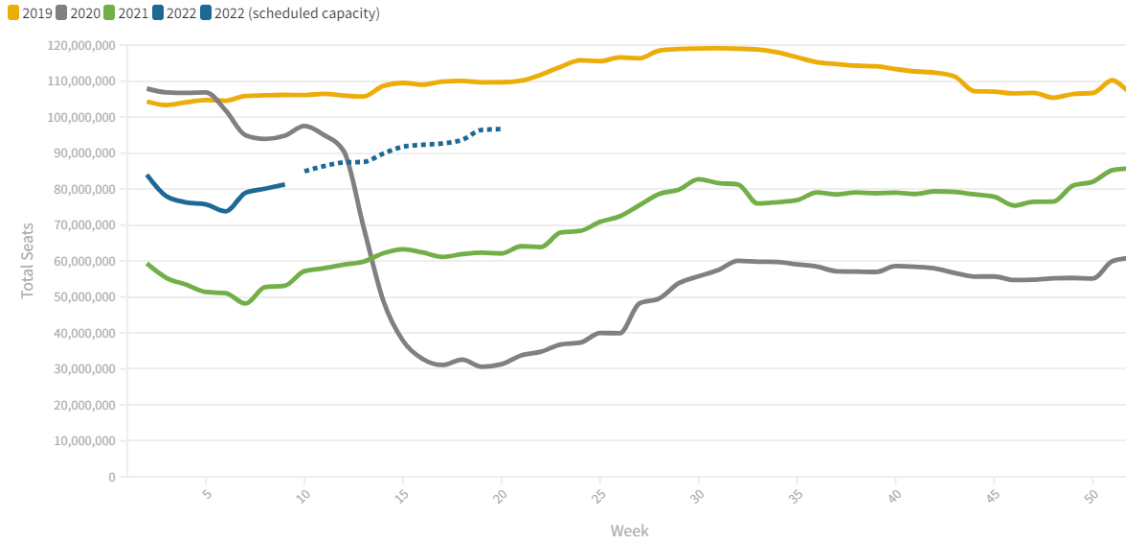
- Almost seven in 10 Italians are likely to travel in the first six months of 2022, with **7% of those intending to travel to international destinations outside Europe.**

OAG Official Aviation Guide Recovery Tracker

Updated to Week of February 21, 2022

OAG – Global Airline Seat Capacity Now 24% Below February 2019 Level

Global Scheduled Airline Seat Capacity, Domestic and International, Year-Over-Year Comparison. Updated to Week of February 21, 2022



- As of February 21, global weekly airline capacity is 24% below what it was the same week in 2019. Capacity is forecast to grow over the next three months.

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

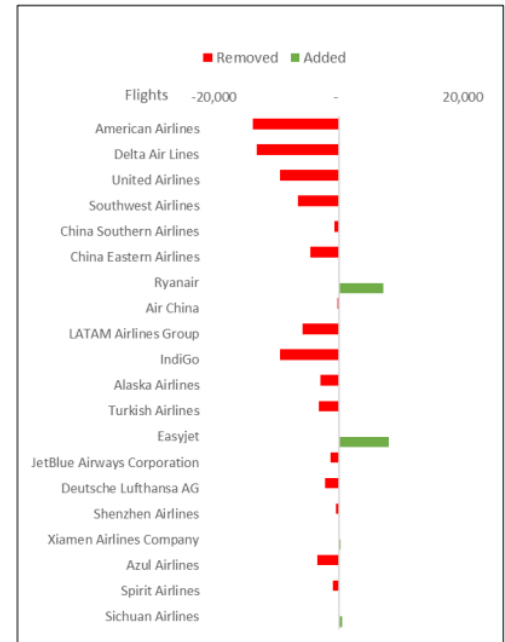
Seat Capacity Change by Region, and Globally

Region	Seats In Feb-22	Change v Feb-19	% Change	Change v Jan-22	% Change
Africa : Central/Western Africa	2,534,180	5.5%		-4.3%	
Africa : Eastern Africa	2,279,579	-19.6%		-10.4%	
Africa : North Africa	3,077,523	-22.2%		7.8%	
Africa : Southern Africa	1,906,283	-40.3%		0.8%	
Asia : Central Asia	1,165,897	-17.4%		-9.2%	
Asia : North East Asia	78,031,385	-19.9%		-5.5%	
Asia : South Asia	15,588,057	-21.5%		-15.2%	
Asia : South East Asia	21,442,884	-46.7%		-2.4%	
Europe : Eastern/Central Europe	11,193,374	-22.4%		-16.1%	
Europe : Western Europe	52,371,332	-34.4%		-3.8%	
Latin America : Caribbean	3,191,983	-20.6%		-11.9%	
Latin America : Central America	9,008,768	-1.2%		-14.0%	
Latin America : Lower South America	11,412,095	-26.8%		-17.8%	
Latin America : Upper South America	6,234,045	-5.9%		-11.1%	
Middle East	14,611,115	-25.5%		-8.8%	
North America	80,058,588	-11.3%		-8.5%	
Southwest Pacific	5,824,589	-48.6%		-21.9%	
Global	319,931,677	-24.2%		-8.1%	

- Global seat capacity is down 24% in February compared with February 2019, and down only 8% over the previous month (January 2022).
- In North America, capacity is down 11% compared with February 2019, and down 9% since January 2022.

Seat Capacity Change by Major Airline

Flights in February 2022 v January 2022



TOURISM
NOVA SCOTIA 