

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 February and mid March, **Halifax climbed from eight to seventh place as a destination city** – behind Ottawa and ahead of Quebec City– in a ranking of domestic online search demand for travel to Canadian cities, according to Google Destination Insights.
- Statistics Canada’s preliminary counts of international travel show that arrivals into Canada by air and road were up in February 2022 over the same month in 2021, but remained **substantially down from the pre-pandemic months** of February 2020 and 2019.
- Statistics Canada’s Tourism Activity Tracker shows the country’s **combined tourism activity was 29% lower in December than the corresponding pre-pandemic month in 2019**. Nova Scotia’s combined tourism output was 34% below the province’s output in December 2019. In both cases, the values are a small improvement over the relative performances in November.

Summary

- The most recent Destination Canada Travel Recovery Assessment says nine provinces and territories remain in the ***Inter-provincial (IV) phase*** of recovery, while Nova Scotia, PEI, Nunavut and NWT have progressed into the ***Tentative International (V) phase*** – the largest number of jurisdictions to reach phase V since the pandemic started.
- Destination Canada’s Resident Sentiment survey shows that **Canadians’ comfort with travel, particularly domestic travel, continues to rebound** from the declines in sentiment seen during the recent COVID-19 Omicron wave. More than half of Canadians in all regions, including seven in 10 Ontarians, now feel safe travelling to other parts of the country.
- The federal government reports that the **number of active COVID-19 cases in Canada decreased** slightly from 120,000 in late February to 115,000 in late March, and the **rate of active cases fell** from 335 to 302 per 100,000 population over the same period.

Summary

- According to Destination Analysts, **three in 10 American travellers intend to travel outside the United States** in the next 12 months, and **Canada is the second-most 'wanted' international destination** (mentioned by 11% of respondents). The most 'wanted' foreign destination is Italy (mentioned by 14%).
- The Official Aviation Guide (OAG) says **global airline seat capacity remains stalled** at about **23% below the capacity level of the same pre-pandemic period in 2019**. Despite the lack of current growth, seat capacity is forecast to rise over the next three months.

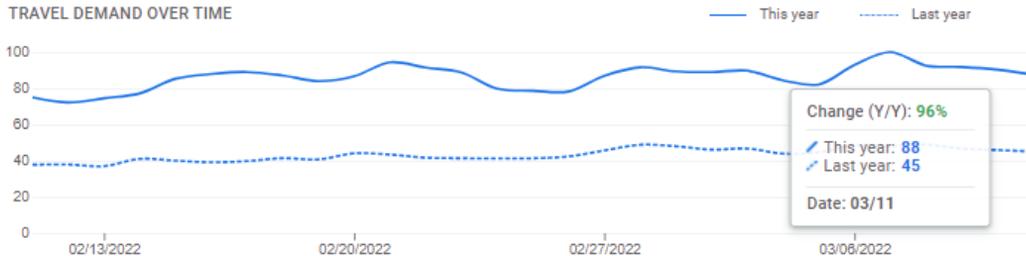
Google Destination Insights

As of March 11, 2022

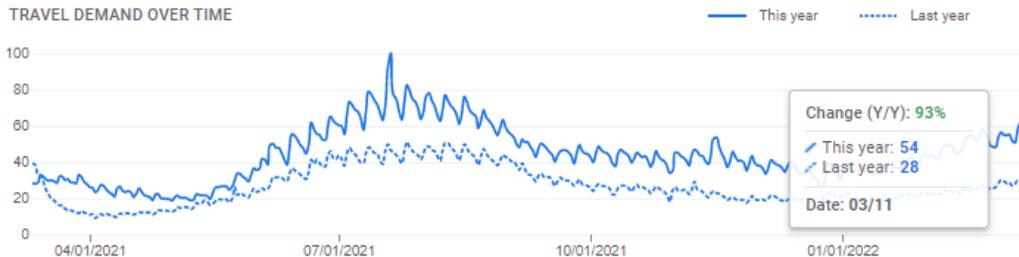
Google Destination Insights: Online *Domestic* Travel Interest in Canada

- 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 Feb. 11, 2022 to Mar. 11, 2022



12-month domestic travel demand Mar. 11, 2021 to Mar. 11, 2022



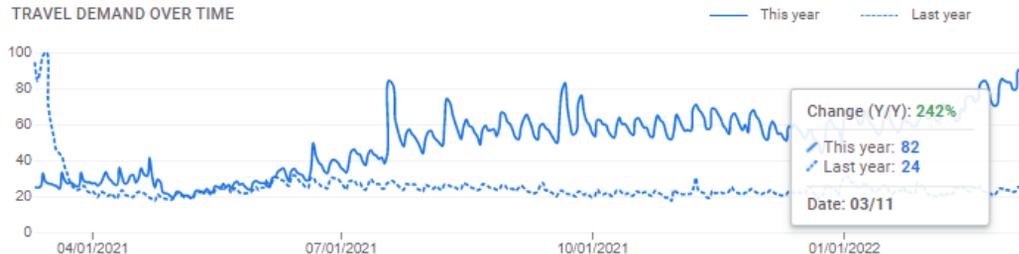
Google Destination Insights: Online *International* Travel Interest in Canada

- 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, Feb. 11, 2022 to Mar. 11, 2022



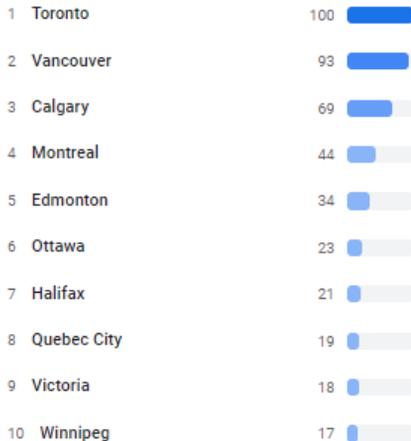
12-month international demand, Mar. 11, 2021 to Mar. 11, 2022



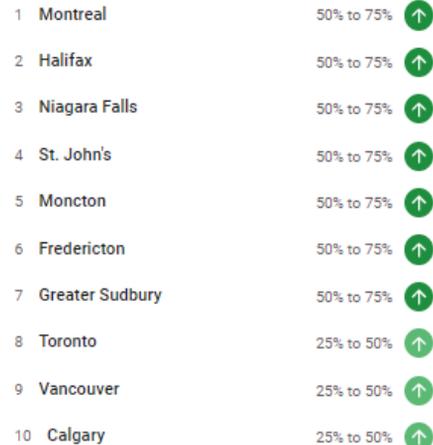
Google Destination Insights: 30-Day Domestic Demand by Destination City

- Cities are scored on an index of 0-100, based on domestic Google search demand by Canadians between **Feb. 11, 2022 to Mar. 11, 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 **Feb. 11, 2022 to Mar. 11, 2022** compared to the previous 30-day period.

TOP DEMAND BY DESTINATION CITY

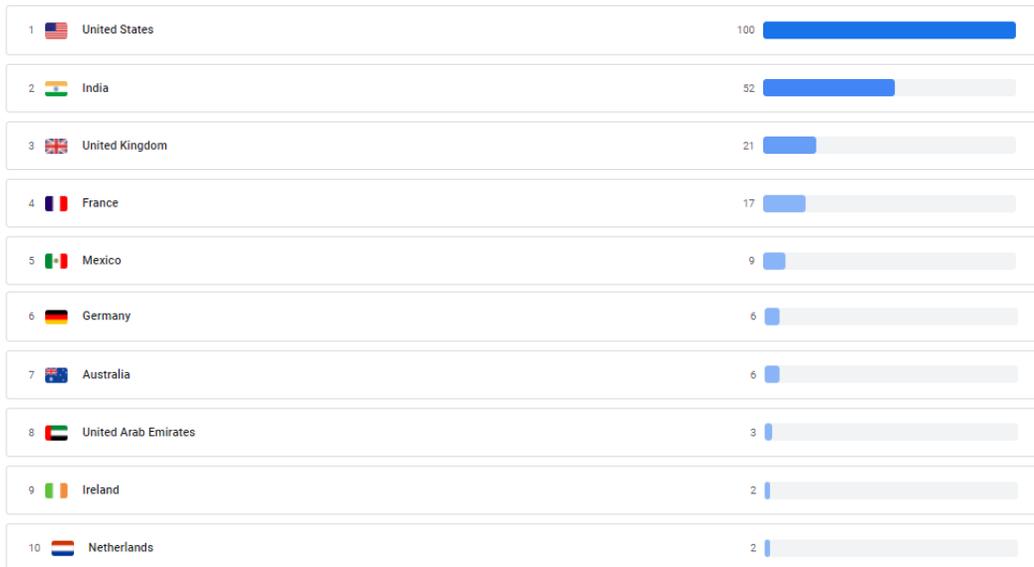


TOP GROWTH BY DESTINATION CITY



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

- Top sources of worldwide online search demand for international travel to Canada, **Feb. 11, 2022 to Mar. 11, 2022**. Countries are scored by search volume, on an index of 0-100, with 100 being the highest indexed volume over the period.

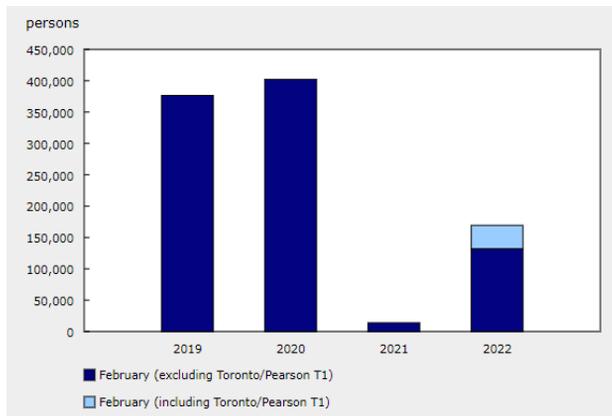


Statistics Canada: International Arrivals – Preliminary Counts, February 2022

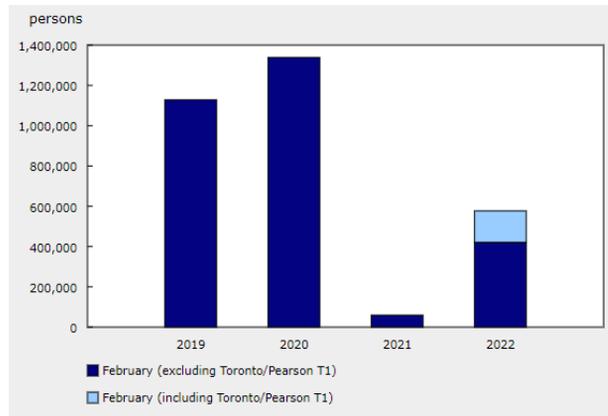
Released March 11, 2022

Statistics Canada: International *Air* Arrivals in February

Non-resident



Canadians



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

February 2019 – 377,000
 February 2020 – 402,000
 February 2021 – 14,000
 February 2022 – 169,000

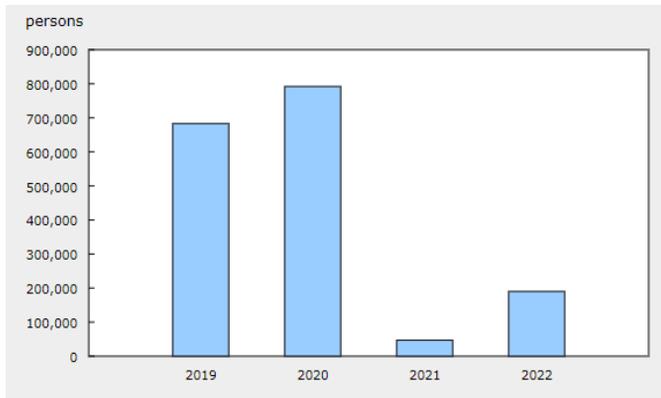
- **Canadians** arriving at Canadian airports:

February 2019 – 1.1 million
 February 2020 – 1.3 million
 February 2021 – 59,000
 February 2022 – 577,000

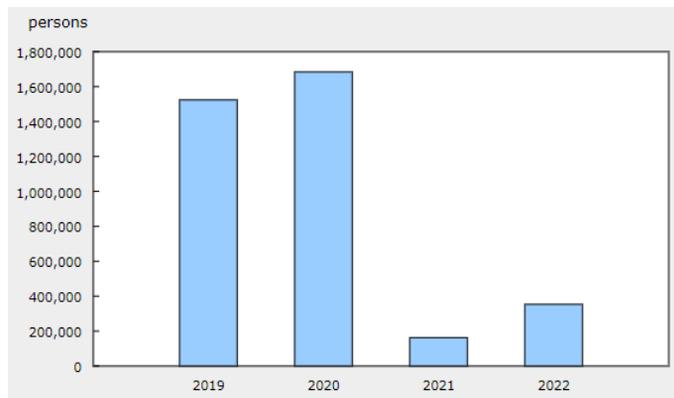
- **Air arrivals were up substantially in February 2022** over February 2021, but remained down from the same pre-pandemic months in 2019 and 2020.

Statistics Canada: International *Road* Arrivals in February

US residents



Canadians



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

February 2019 – 683,000

February 2020 – 792,000

February 2021 – 47,000

February 2022– 190,000

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

February 2019 – 1.5 million

February 2020 – 1.7 million

February 2021 – 162,000

February 2022– 353,000

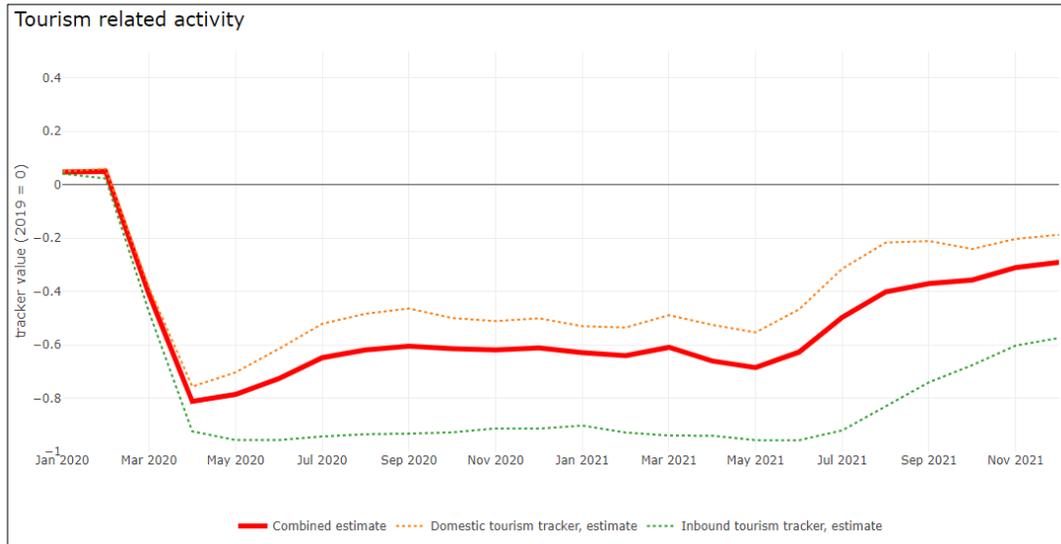
- **Road arrivals were up in February 2022** over February 2021, but remained down substantially from the same pre-pandemic months in 2019 and 2020.

Statistics Canada: Canadian Tourism Activity Index

Updated to December 2021

Statistics Canada: Tourism Activity Index – Canada

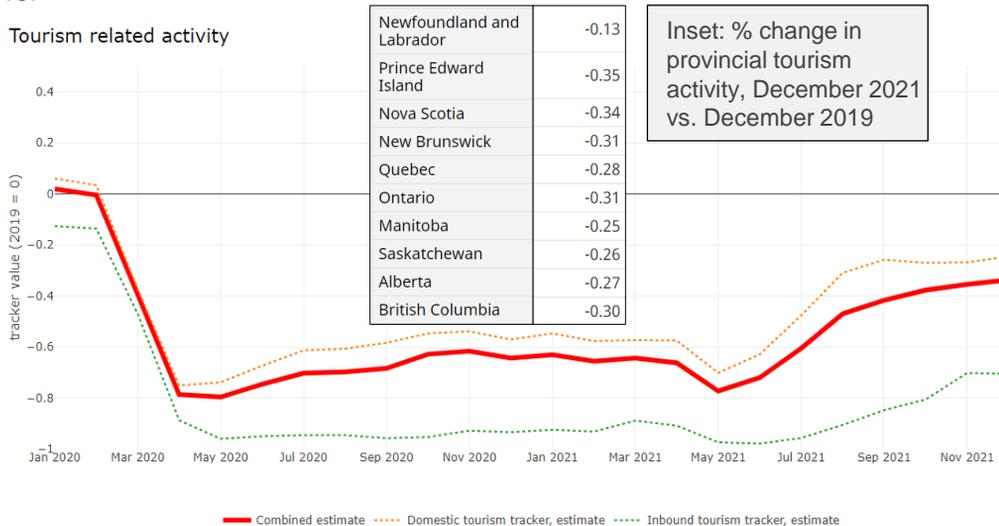
- The index shows the relative performance of aggregated tourism activity in Canada (i.e., arrivals, departures, spending etc.) over time. The base period – with an index measure of '0' – is 2019.



- In **December 2021**, combined tourism activity in **Canada** was **29% below** the level in December 2019, which is a small improvement from the index level in November 2021 (-31%). This was the seventh consecutive month of improvement since May and the highest level of activity since March, 2020.

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 **December 2021**, combined tourism activity in **Nova Scotia** was **34% below** the level in December 2019, a marginal improvement from November 2021 (-35%). Nova Scotia’s December decline is greater than the national decline (-29%), and is the second-highest decline in December among all the provinces after PEI (see inset), largely a result of slowing *inbound* tourism in December.

Destination Canada: Travel Recovery Assessment

Updated to March 1, 2022

Destination Canada Provincial Travel Recovery Assessment

Timeline of overall assessment for each province and territory:

	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	08-Feb	15-Feb	22-Feb	01-Mar	
British Columbia	IV	IV																		
Alberta	IV	IV																		
Saskatchewan	IV	IV																		
Manitoba	IV	IV																		
Ontario	IV	IV																		
Quebec	IV	V	V	IV	IV															
New Brunswick	IV	IV																		
Nova Scotia	IV	V	V	V	V															
Prince Edward Island	IV	IV	IV	IV	IV	IV	V	V	V	V	IV	III	V							
Newfoundland & Labrador	IV	II	IV																	
Yukon	IV	IV																		
Northwest Territories	IV	V																		
Nunavut	IV	II	V																	

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 **March 1, 2022**:

- Nine provinces and territories are in the **Inter-provincial (IV)** phase of recovery.
- In mid-February, Nova Scotia progressed from phase **IV** into the **Tentative International (V)** phase. PEI, Northwest Territories and Nunavut also progressed into phase **V** in March.
- Newfoundland and Labrador jumped from the **Hyper Local (II)** phase into phase **IV** in March.

Destination Canada: Resident Sentiment Survey

Updated data to week of March 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	83	90	82	84	78	80	95	71
Communities in my province	78	87	81	81	81	81	91	75
Other provinces in Canada	61	80	71	71	69	58	69	53
The United States	34	51	46	42	44	28	25	30
Other countries	34	47	46	37	36	20	22	20
SAMPLE SIZE	200	200	200	601	414	200	123	75

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

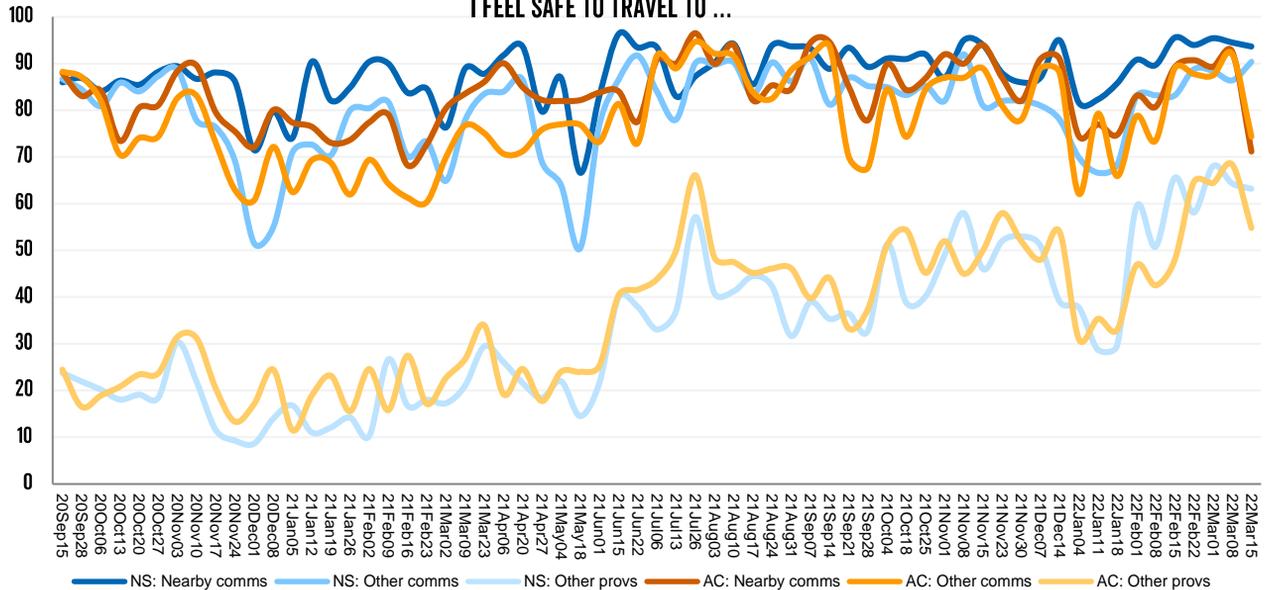
Destination Canada Resident Sentiment – Safety of Travel

- A large majority of Canadians report feeling safe travelling *to nearby communities and elsewhere in their own provinces*. And a substantial minority in most regions feel safe travelling *internationally*.
- After the steep declines through December and January in the midst of the COVID-19 Omicron wave, comfort with travel, particularly *domestically*, has rebounded substantially across all regions.
- More than half of Canadians in all regions – including seven in 10 Ontarians – would feel safe travelling to *other provinces*.
- Atlantic Canadians' feelings of safety travelling *within their own province* are at similar levels with those of residents in other regions. However, their comfort level with travel *elsewhere in the country, or internationally*, remains significantly behind the sentiment in most other regions.
 - Although the four Atlantic provinces generally have had similar opinions over the course of the resident sentiment survey, New Brunswick residents' feelings of safety are significantly lower than other Atlantic provinces for the week of March 15th, contributing to lower sentiment overall for the region.

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 Nova Scotians, feelings of safety for travelling in general have remained relatively high through mid-March. The Atlantic Canadian average has declined due to the influence of lower safety ratings among New Brunswick residents.

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	85	78	74	78	81	90	94	88
Communities in my province	78	77	72	76	83	87	88	88
Other provinces in Canada	64	71	66	70	78	72	60	79
The United States	38	50	50	49	59	38	38	39
Other countries	37	47	47	43	56	35	35	36
SAMPLE SIZE	237	218	206	624	442	206	136	69

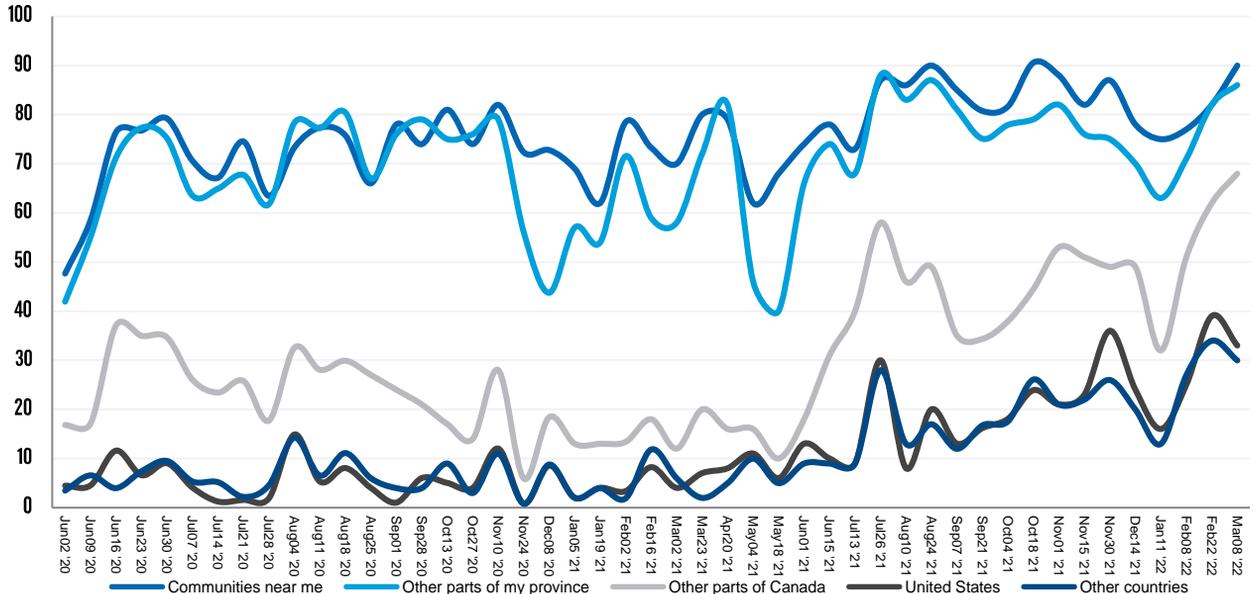
- % Somewhat / Strongly Agree.
- Note: red/green text indicates a significant difference between regions.
- Results from week of March 8, 2021.

Destination Canada Resident Sentiment – Welcoming Visitors

- A majority of Canadians in all regions are willing to welcome visitors from *within their own province*, and increasingly from *other parts of the country*.
- About half of Canadians in most regions are willing to welcome *international* visitors, with residents of Atlantic Canada and British Columbia somewhat less willing.

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. Nova Scotians are also increasingly ready to welcome visitors from the rest of the country. Only about one-third would welcome international visitors.

Destination Canada Resident Sentiment – Promoting Home Community to Visitors

- ‘How would you feel if you saw an advertisement today promoting your community to each of the following regions as a place for visitors to come when it is safe?’

	REGION OF RESIDENCE						ATLANTIC CANADA	
	BC	AB	SK / MB	ON	QC	ATL	Rural	Urban
Communities near me	+36	+56	+57	+43	+51	+51	+67	+43
Communities in my province	+38	+55	+54	+42	+51	+53	+64	+46
Other provinces in Canada	+18	+49	+48	+36	+43	+35	+29	+34
The United States	-15	+15	+20	+2	+19	-2	-17	+8
Other countries	-15	+17	+19	+4	+21	-15	-20	-10
SAMPLE SIZE	200	200	200	601	414	200	123	75

- 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 March 15, 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 those 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*.
- Residents of Atlantic Canada, British Columbia, and Ontario are neutral or slightly negative about having their communities advertised to *international* visitors, while residents in the remaining regions are increasingly positive about the idea.

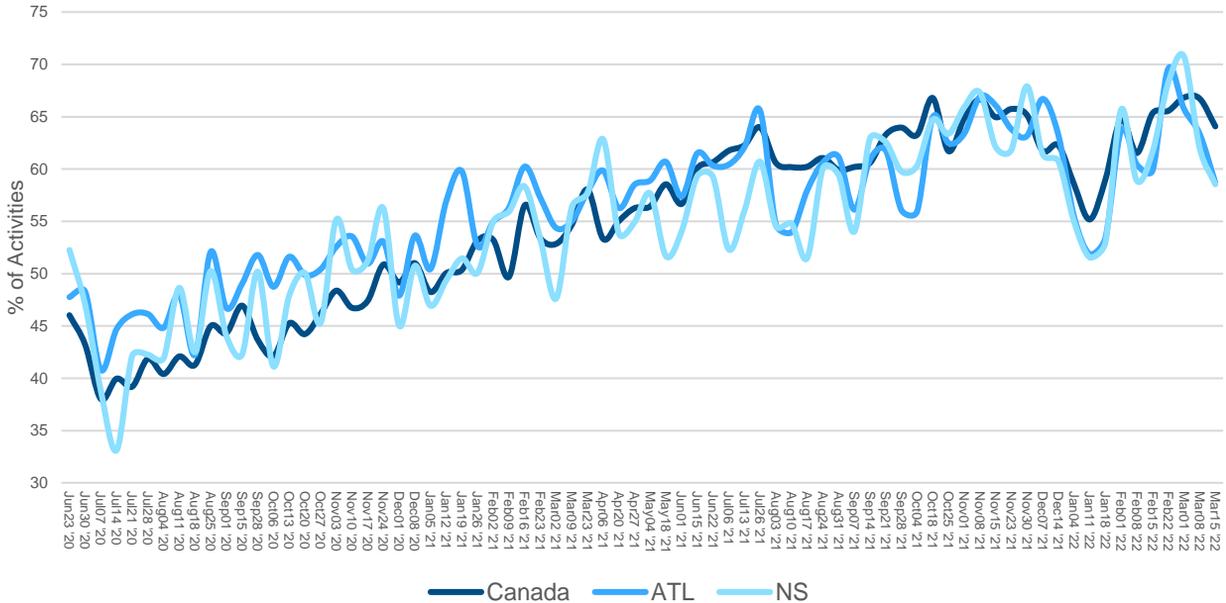
Destination Canada – Comfort With Activities, Most/Least Comfortable

- ‘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	85	84	88
Shopping at the mall	80	79	87
Going back to your workplace/office	78	80	78
Dining in restaurants	77	76	78
Activities least comfortable with:			
Flying on an airplane	53	39	36
Travelling to the United States	50	33	33
Large gatherings such as sporting events, concerts, or festivals	49	41	42
Going to bars, lounges, night clubs, pubs	46	47	44
SAMPLE SIZE	1815	200	102

- % Comfortable with each activity, among applicable.
- Results from week of March 15, 2022.

Destination Canada – Comfort With Activities (% Overall)



Destination Canada – Comfort With Activities

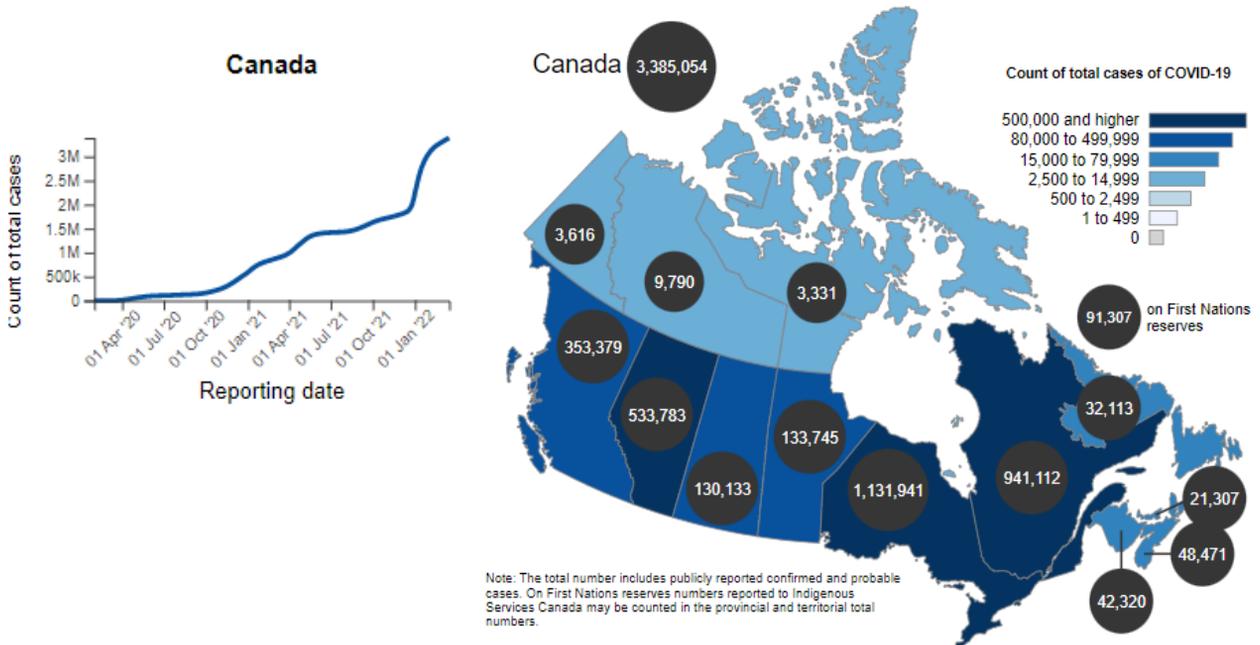
- The overall percentage of activities that Canadians are comfortable with has regained most of the decline seen in December and January.
- Among those activities Canadians are least comfortable with, about half express comfort with *flying on an airplane, travelling to the United States, and attending large public gatherings*. The least popular activity among Canadians is *going to bars and pubs*, with only 46% saying they are comfortable doing this.
- Atlantic Canadian sentiment continues to lag behind that of other Canadians in terms of their willingness to *fly on an airplane, or travel to the United States*.

Government of Canada COVID-19 Status

As of March 17, 2022

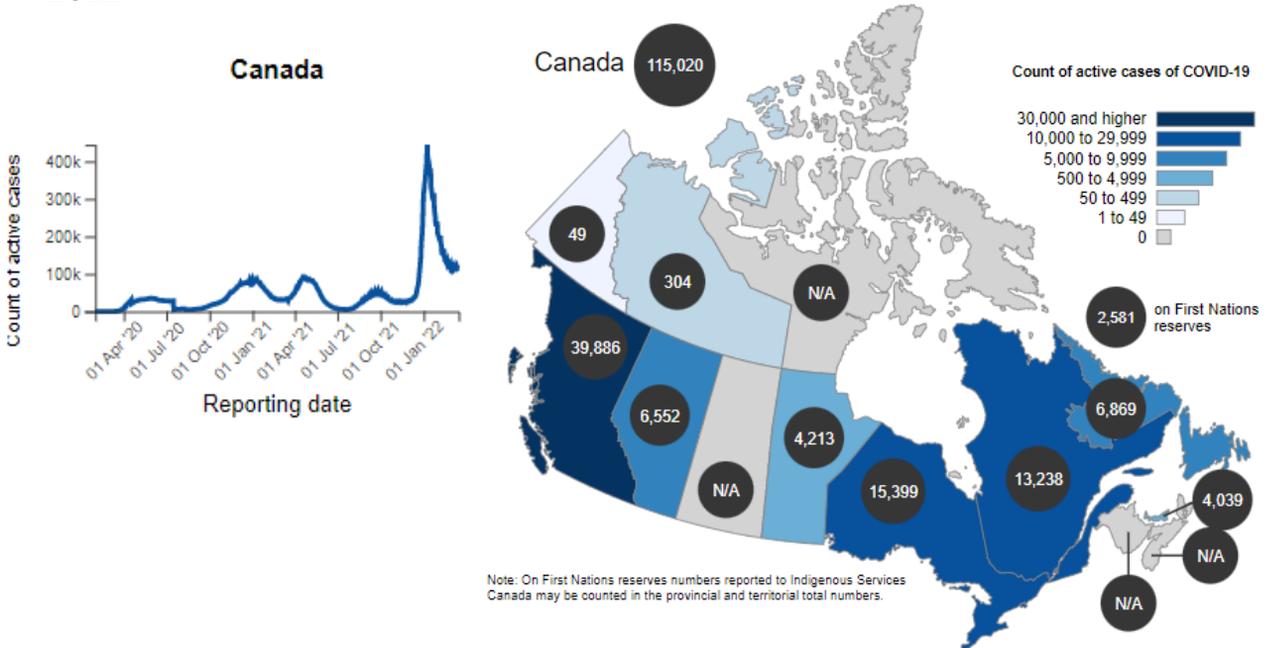
Government of Canada – COVID-19 Count of *Total* Cases

- The count of total cases of COVID-19 in **Canada** was **3,385,054** as of March 17, 2022.



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

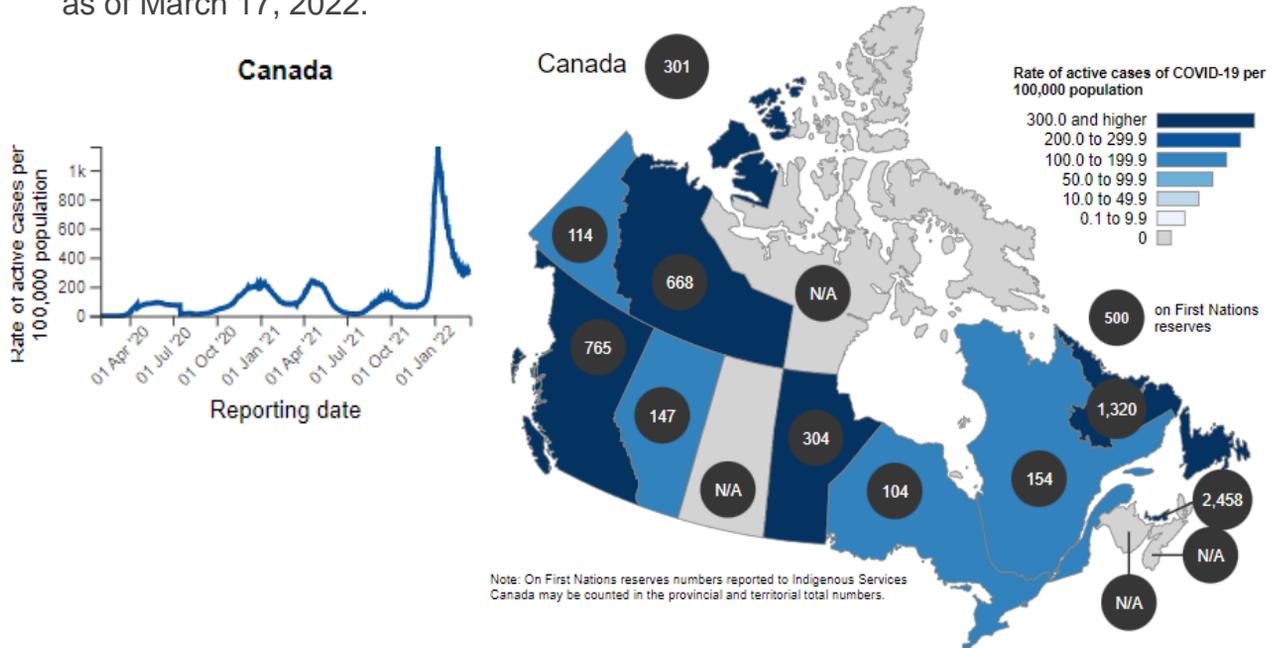
- The count of active cases of COVID-19 in **Canada** was **115,020** as of March 17, 2022.



Government of Canada – COVID-19

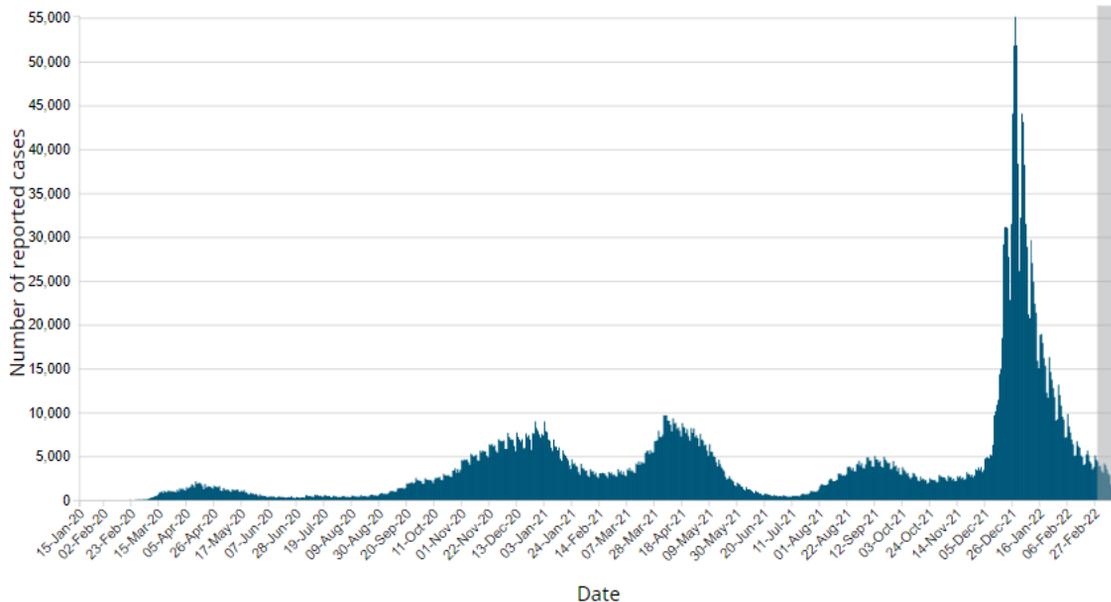
Rate of Active Cases

- The rate of active cases of COVID-19 in **Canada** was **301 per 100,000 population** as of March 17, 2022.



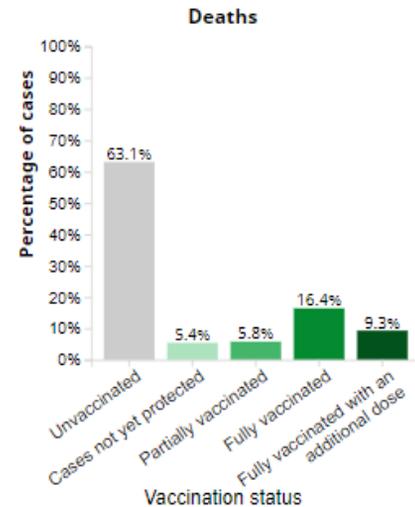
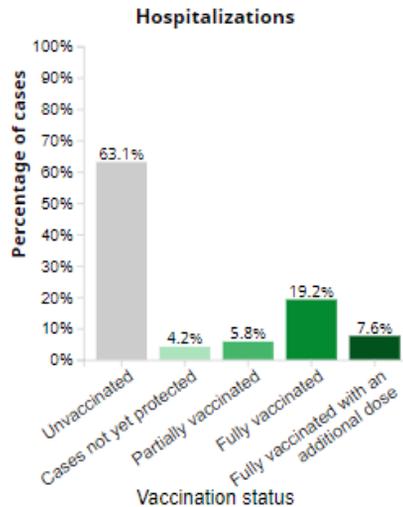
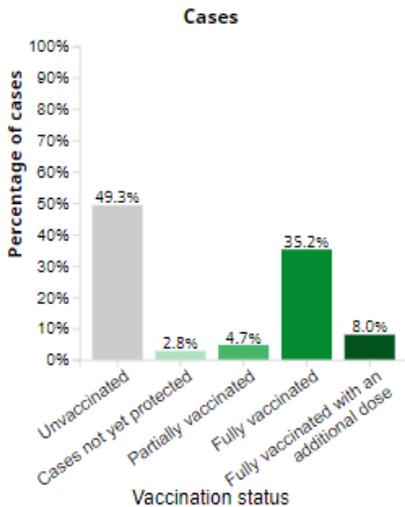
Government of Canada – COVID-19 Cases by *Date* (Epidemic Curve)

- Total COVID-19 cases in Canada (n=3,284,725) by date of illness onset, as of March 18, 2022.



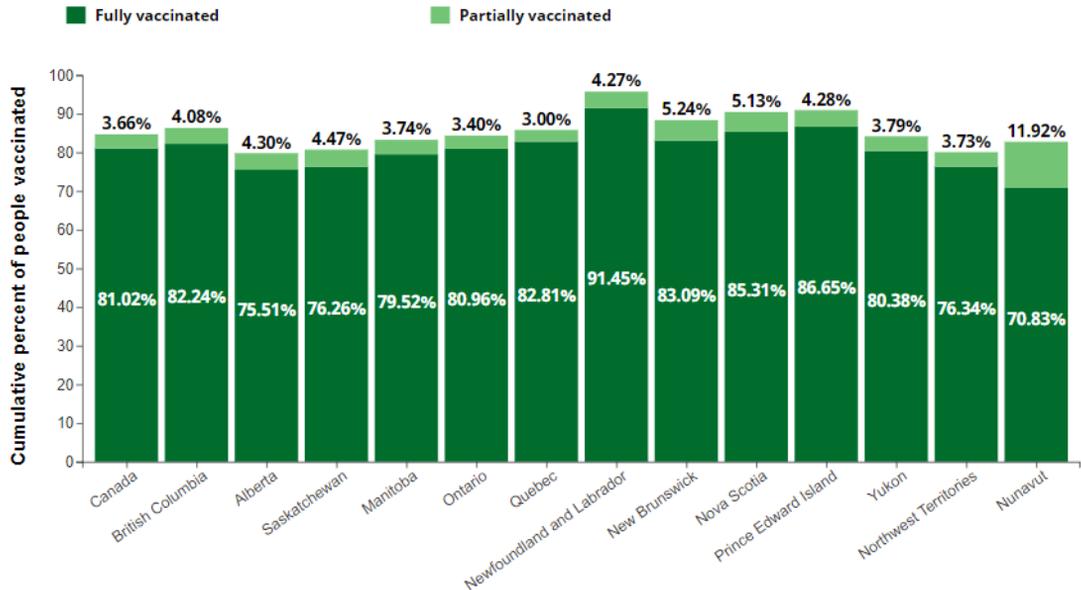
Government of Canada – COVID-19 Cases by *Vaccination Status*

- Percentage of COVID-19 cases in Canada by vaccination status, as of February 27, 2022.



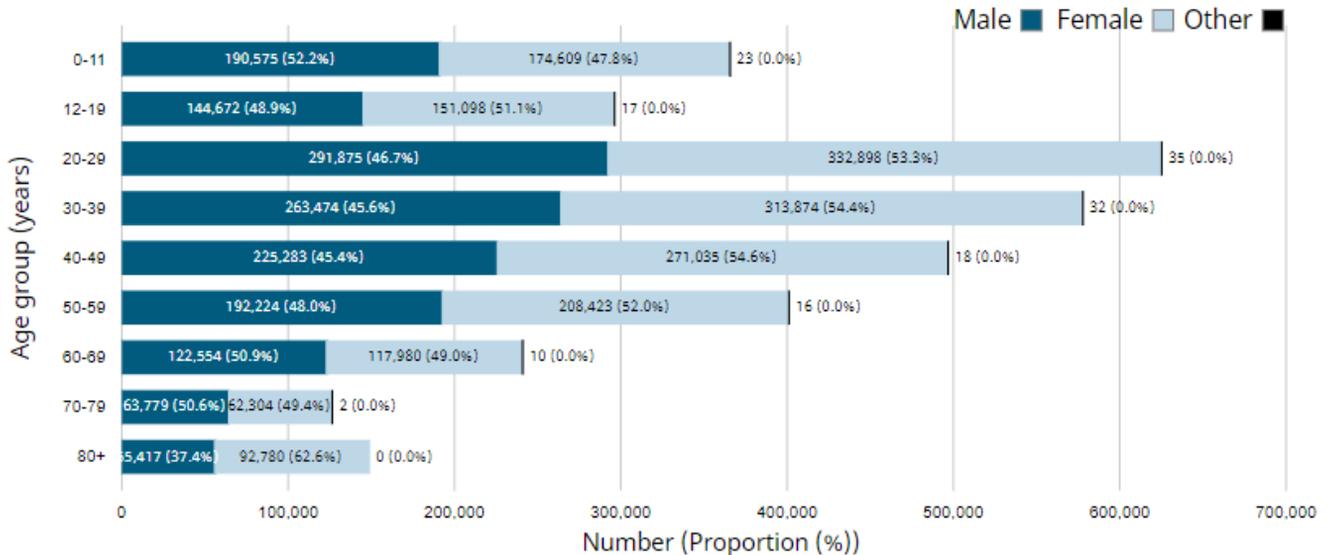
Government of Canada – Percentage Fully Vaccinated

- The cumulative percent of the population **fully vaccinated** with a COVID-19 vaccine in Canada was **81.02%** as of March 13, 2022.



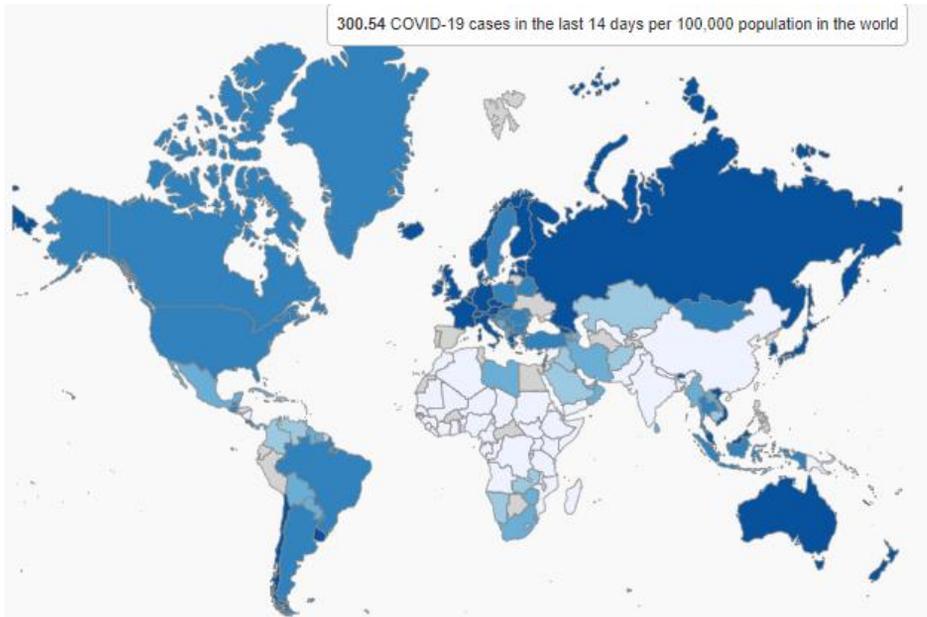
Government of Canada – COVID-19 Cases by Age & Gender Distribution

- Total COVID-19 cases in Canada by age group and gender, as of March 18, 2022.

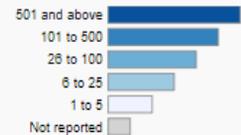


Government of Canada – COVID-19 World Cases, by Country

- Number of COVID-19 cases in the last 14 days per 100,000 people, by country, on March 16, 2022.

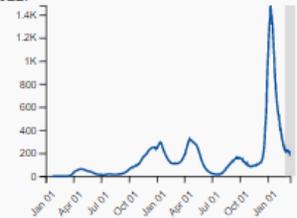


Number of cases in the last 14 days per 100,000 population of COVID-19



Canada

206.84 COVID-19 cases in the last 14 days per 100,000 population as of March 16th, 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 March 1, 2022

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

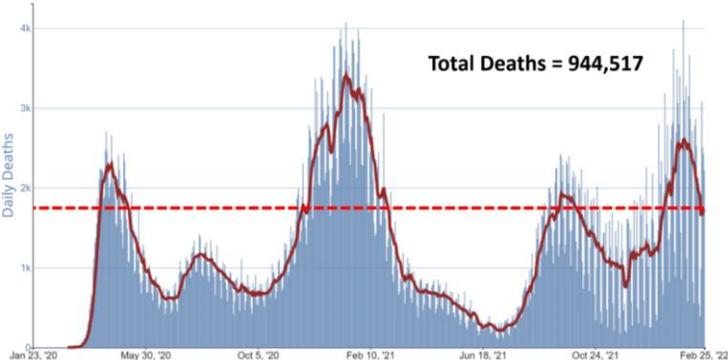
Daily Trends in Number of COVID-19 Cases in The United States Reported to CDC



- February 25, 2022: The number of new COVID-19 cases in the US is falling.

- February 25, 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

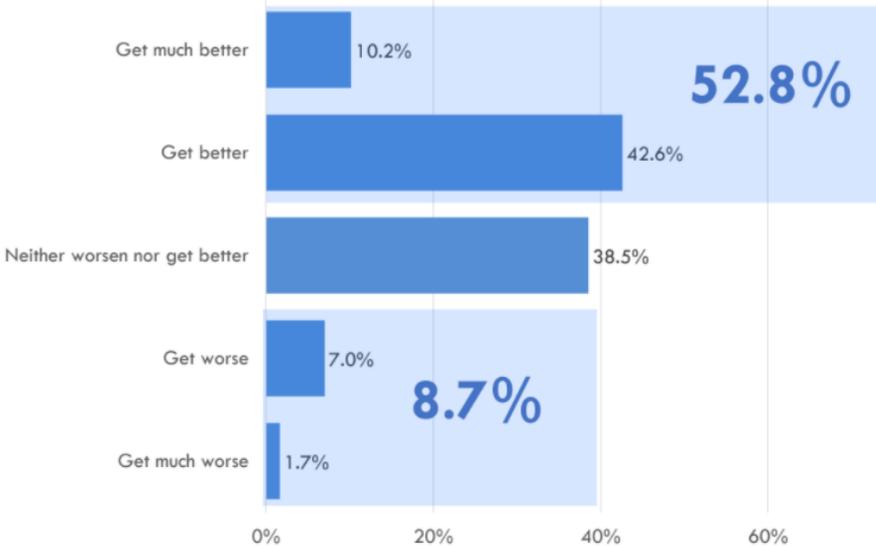


Destination Analysts: Half of US Travellers Expect Pandemic Situation to Improve

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 85 data. All respondents, 1,262 completed surveys. Data collected February 23-25, 2022)



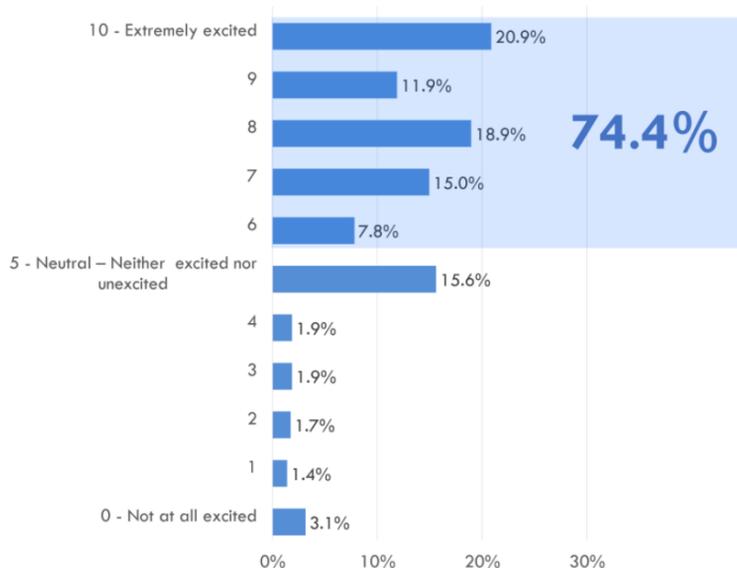
- About one-half of US travellers expect the COVID-19 situation to get better over the next month – the highest such level since last June. Four in 10 expect no change in the pandemic.

Destination Analysts: Strong Majority of American Travellers Excited to Travel Now

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)

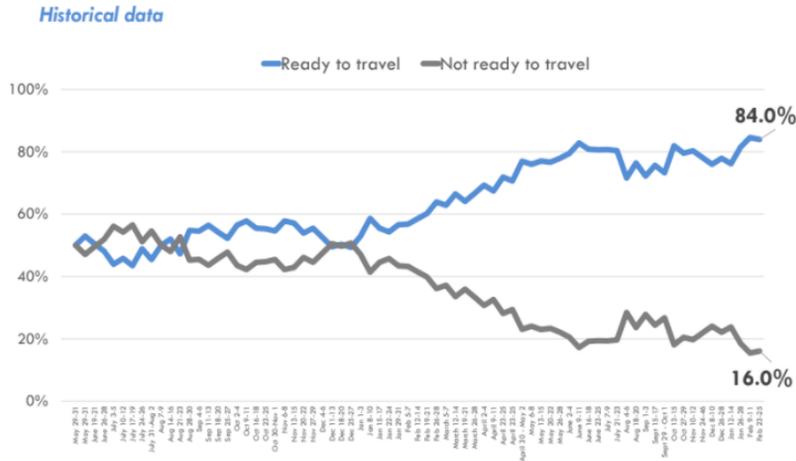
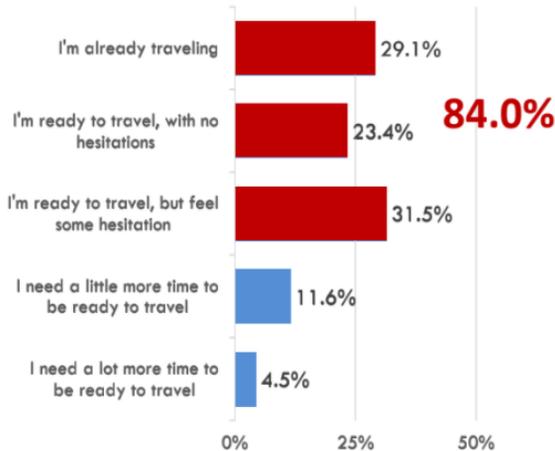
(Base: Wave 85 data. All respondents, 1,262 completed surveys. Data collected February 23-25, 2022)



- Three-quarters of US travellers say they're excited by the idea of taking a leisure trip within the next month – again, the highest such levels since June 2021.

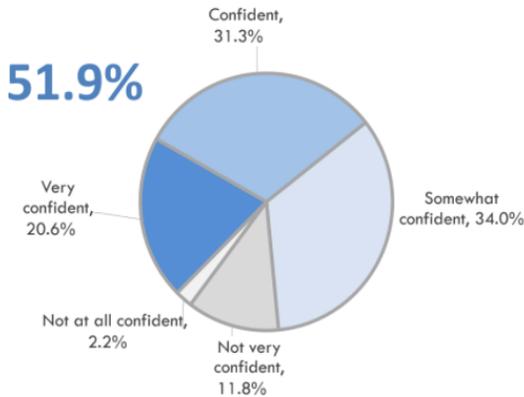
Destination Analysts: Large Majority Ready to Get Back Out And Travel Again

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



Destination Analysts: Confidence in Ability to Travel Safely Approaching Record High

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



(Base: Wave 85 data. All respondents, 1,262 completed surveys. Data collected February 23-25, 2022)

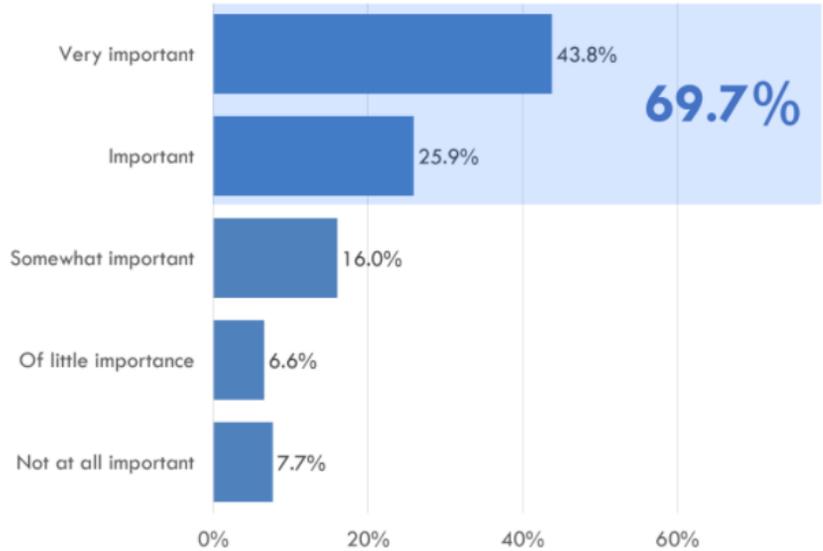


- A slim majority of US travellers (52%) believe they can travel safely today. This is approaching the record high number expressing confidence in the safety of travel last June.

Destination Analysts: Most Want Ongoing COVID-19 Safety Practices at Destinations

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)

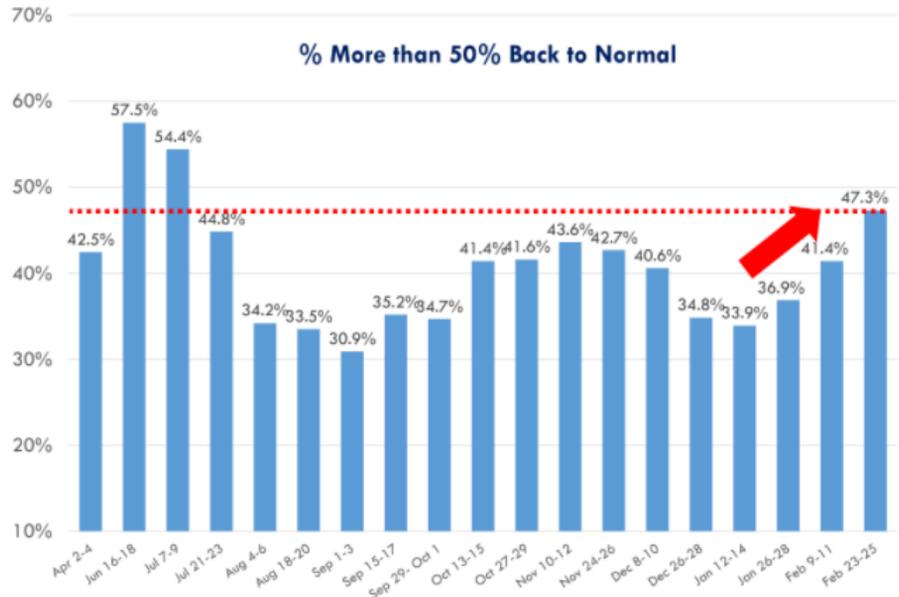
(Base: Wave 85 data. All respondents, 1,262 completed surveys. Data collected February 23-25, 2022)



- Seven in 10 US travellers believe it is 'important' or 'very important' that destinations maintain COVID-19 safety practices.

Destination Analysts: Growing Sense of 'Normalcy' Around Leisure Activities

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

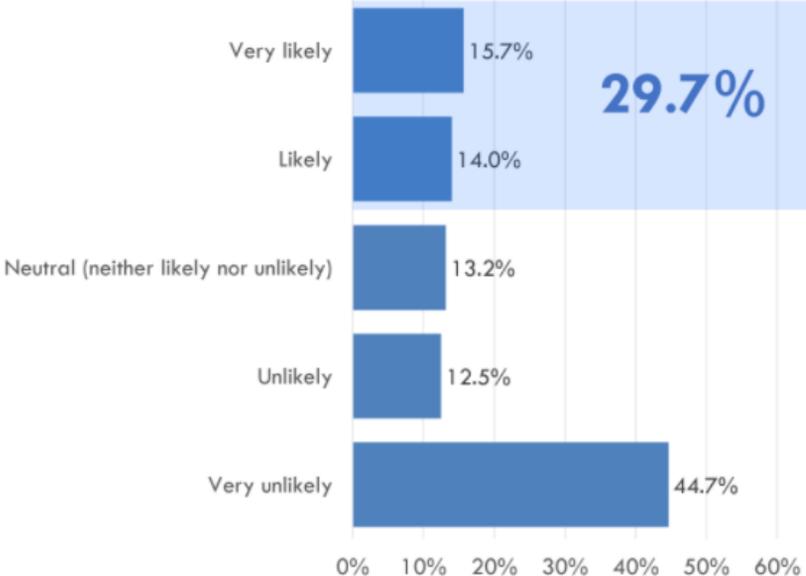


- An increasing percentage of American travellers – now more than 47% – say the US is more than halfway back to 'normal' in terms of the resumption of leisure activities such as travel.

Destination Analysts: Strong Minority Expresses Interest in International Travel

Question: How likely are you to travel outside the United States for leisure in the NEXT TWELVE (12) MONTHS?

(Base: Wave 85 data. All respondents, 1,262 completed surveys. Data collected February 23-25, 2022)



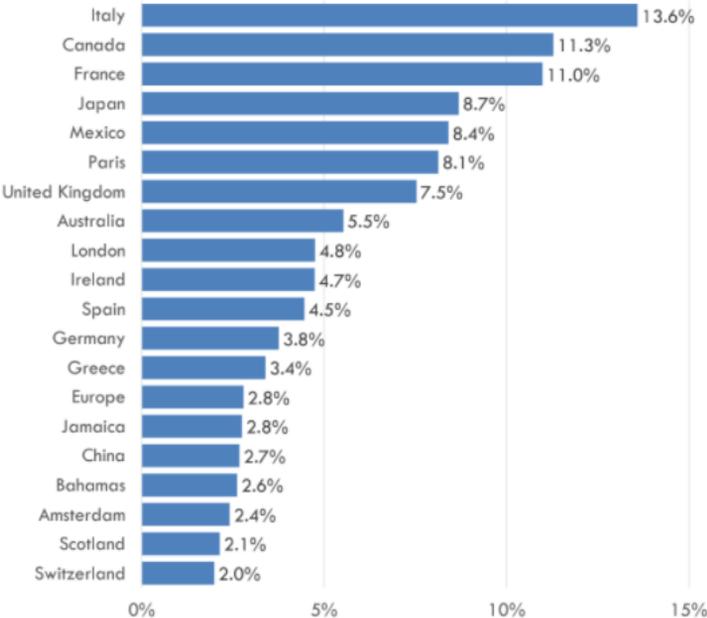
- Three in 10 US travellers say they are likely to take an international leisure trip in the next 12 months. Almost six in 10 say they are unlikely to do so.

Destination Analysts: Canada Second Most Mentioned Foreign Destination

Question: Which foreign destinations do you most want to visit in the NEXT TWELVE (12) MONTHS? (Write in up to five)

(Please only include destinations outside the United States)

(Base: Wave 85 data. All respondents, 517 completed surveys. Data collected February 23-25, 2022)



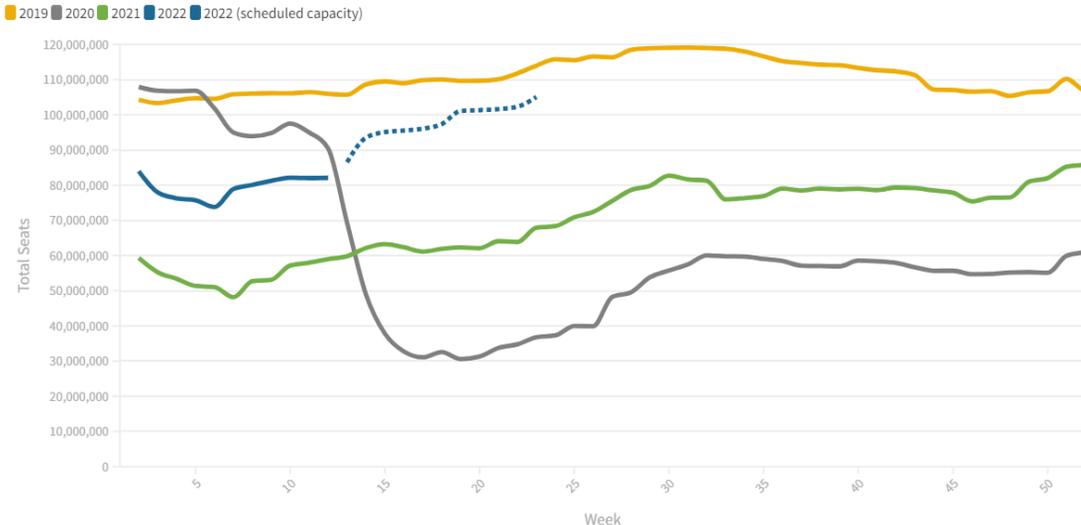
- After Italy, Canada is the next most 'wanted' international destination for US travellers in the coming year, mentioned by more than 11% of survey respondents.

OAG Official Aviation Guide Recovery Tracker

Updated to Week of March 14, 2022

OAG – Combined Global Airline Seat Capacity 23% Below 2019 Level

Global Scheduled Airline Seat Capacity, Combined Domestic and International, Year-Over-Year Comparison. Updated to Week of March 14, 2022

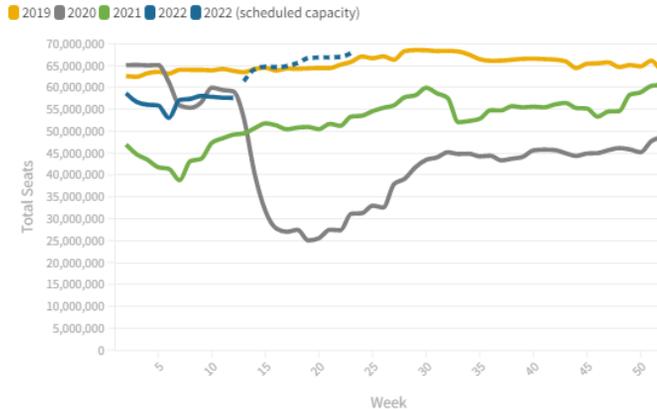


- As of mid-March, global weekly airline seat capacity remains stalled at 23% below what it was the same week in 2019. Despite the lack of current growth, capacity is forecast to increase over the next three months.

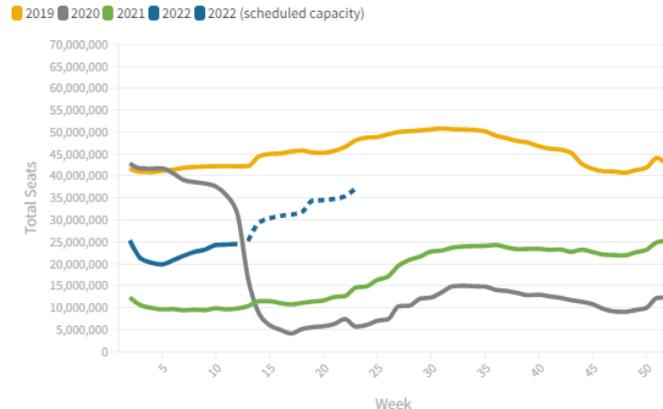
OAG – Domestic Seat Capacity Only 10% Below 2019 Level

Global Scheduled Airline Seat Capacity, Domestic and International, Year-Over-Year Comparison. Updated to Week of March 14, 2022

DOMESTIC SEATS



INTERNATIONAL SEATS



- Globally, as of mid-March, domestic capacity is 10% below what it was the same week in 2019.

- As of mid-March, international capacity is 42% below what it was the same week in 2019.

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