

COVID-19 Impact and Recovery Report: Domestic Travel

Updated: June 2, 2020

This document provides a snapshot of the domestic recovery situation in Canada. It has the following sections:

- 1. Recovery Signals:** The comprehensive approach to understanding when inter-provincial/territorial travel is recovering based on data and analysis in partnership with Google, a major online travel agency, International Air Transport Association (IATA) and more. Destination Canada uses this information to estimate the stage of recovery in each province and territory.
- 2. Methodological Notes:** An explanation of the methodologies in the different sections and relevant sources.

1. RECOVERY SIGNALS

In response to COVID-19, Destination Canada has established a framework and analytical approach to identify signals from consumer and industry behaviour to understand when, where and at what pace travel and tourism will resume. Destination Canada collaborated with partners in destination marketing, media, technology and travel to identify these indicators and signals. The framework has identified multiple phases of recovery, which aligns with user sentiment and intent to travel. For smaller provinces and territories, it is cautioned that lower availability of data can impact the reliability of signals. Given these limitations, Destination Canada has provided an assessment for all provinces and territories to the best of its ability. The summary of the methodology and terms can be found in Section 2. Methodological Notes.

Summary of current phase for each province and territory:

	Destination Canada's Overall Assessment of Each Market	Notes
British Columbia	II Hyper Local	Increases in intra-provincial travel search and a declining number of weekly cases, combined with low levels of intra-provincial accommodation searches and bookings that are increasing at a steady pace, indicate that British Columbia is in the Hyper Local phase.
Alberta	II Hyper Local	Increases in intra-provincial travel search and a declining number of weekly cases, combined with low levels of intra-provincial accommodation searches and bookings that are increasing at a steady pace, indicate that Alberta is in the Hyper Local phase.
Saskatchewan	II Hyper Local	Increases in intra-provincial travel search and a declining number of weekly cases, combined with low levels of intra-provincial accommodation searches and bookings that are increasing at a steady pace, indicate that Saskatchewan is in the Hyper Local phase.
Manitoba	II Hyper Local	Increases in intra-provincial travel search and a low number of weekly cases, combined with low levels of intra-provincial accommodation searches that are fluctuating and bookings that are increasing at a steady pace, indicate that Manitoba is in the Hyper Local phase.
Ontario	I COVID-19 Response	Moderate to low increases in intra-provincial travel search and a relatively high number of weekly cases, combined with intra-provincial accommodation searches that are plateaued at a very low level and bookings that are increasing at a slow pace, indicates that Ontario is in the COVID-19 Response phase.
Quebec	I COVID-19 Response	While it remains at low levels, a sharp increase has been observed for intra-provincial travel search in the current week. A relatively high number of weekly cases, combined with low levels of intra-provincial accommodation searches and bookings, indicates that Quebec is in the COVID-19 Response phase.
New Brunswick	II Hyper Local	Increases in intra-provincial travel search and a low number of weekly cases, combined with low levels of intra-provincial accommodation searches and bookings that are increasing at a steady pace, indicate that New Brunswick is in the Hyper Local phase.
Nova Scotia	I COVID-19 Response	Although Nova Scotia has a low number of weekly cases, intra-provincial travel search remains at low but steadily increasing levels. Intra-provincial accommodation searches and bookings are also plateaued at very low levels. This indicates that Nova Scotia is in the COVID-19 Response phase.
Prince Edward Island	II Hyper Local	Increases in intra-provincial travel search and a low number of weekly cases, combined with low levels of intra-provincial accommodation searches and bookings, indicate that Prince Edward Island is in the Hyper Local phase.
Newfoundland & Labrador	II Hyper Local	Increases in intra-provincial travel search and a low number of weekly cases, combined with low levels of intra-provincial accommodation searches and bookings, indicate that Newfoundland & Labrador is in the Hyper Local phase.
Yukon	II Hyper Local	Increases in intra-territorial travel search and a low number of weekly cases, combined with low levels of intra-territorial accommodation searches and bookings that are fluctuating, indicate that Yukon is in the Hyper Local phase.
Northwest Territories	III Regional	Although fluctuating, both intra-territorial travel search and intra-territorial accommodation bookings remain strong compared to other jurisdictions. These signals, combined with a low number of weekly cases, indicate that the Northwest Territories is in the Regional phase.
Nunavut	I COVID-19 Response	Although Nunavut has recorded no confirmed COVID-19 cases, there have been only moderate to low increases in intra-territorial travel search. Intra-territorial accommodation searches are also fluctuating. This indicates that Nunavut is in the COVID-19 Response phase.

British Columbia	II Hyper Local	Increases in intra-provincial travel search and a declining number of weekly cases, combined with low levels of intra-provincial accommodation searches and bookings that are increasing at a steady pace, indicate that British Columbia is in the Hyper Local phase.
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British Columbia Assessment Summary:

	Phase						Analysis
	I COVID-19 Response	II Hyper Local	III Regional	IV Inter-prov	V Tentative Int'l	VI Regularized Int'l	
Travel Search Index	○	●	○	○	○	○	YOY intra-provincial travel searches have been steadily increasing since the week ending April 12, 2020, with a sharp increase the week ending May 31, 2020.
Accommodation Searches on OTA	●	○	○	○	○	○	YOY intra-provincial accommodation searches are at low levels but have been steadily increasing since the week ending April 19, 2020.
Rate of Hotel Booking	●	○	○	○	○	○	YOY intra-provincial accommodation bookings are at low levels but have been steadily increasing since the week ending April 5, 2020.
Rate of Air Travel	/	/	/	○	○	○	Not applicable at this stage.
New COVID Cases	○	●	○	/	/	/	The number of weekly new cases in British Columbia for the week ending May 31, 2020 was 56. This is the lowest number of cases since the week ending March 15.

Legend: Current phase ● Not there yet ○ Signal not applicable □

Alberta	II Hyper Local	Increases in intra-provincial travel search and a declining number of weekly cases, combined with low levels of intra-provincial accommodation searches and bookings that are increasing at a steady pace, indicate that Alberta is in the Hyper Local phase.
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Alberta Assessment Summary:

	Phase						Analysis
	I COVID-19 Response	II Hyper Local	III Regional	IV Inter-prov	V Tentative Int'l	VI Regularized Int'l	
Travel Search Index	○	●	○	○	○	○	YOY intra-provincial travel searches have been steadily increasing since the week ending April 12, 2020.
Accommodation Searches on OTA	●	○	○	○	○	○	YOY intra-provincial accommodation searches are at low levels but have been steadily increasing since the week ending April 19, 2020.
Rate of Hotel Booking	●	○	○	○	○	○	YOY intra-provincial accommodation bookings are at low levels. Bookings had been steadily increasing since the week ending April 12, 2020, but declined slightly during the week ending May 31, 2020, perhaps given a decline after the May long weekend.
Rate of Air Travel	/	/	/	○	○	○	Not applicable at this stage.
New COVID Cases	○	●	○	/	/	/	The number of weekly new cases in Alberta for the week ending May 31, 2020 was 150. This is the lowest number of cases since the week ending March 15.

Legend: Current phase ● Not there yet ○ Signal not applicable □

Saskatchewan	II Hyper Local	Increases in intra-provincial travel search and a declining number of weekly cases, combined with low levels of intra-provincial accommodation searches and bookings that are increasing at a steady pace, indicate that Saskatchewan is in the Hyper Local phase.
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Saskatchewan Assessment Summary:

	Phase						Analysis
	I COVID-19 Response	II Hyper Local	III Regional	IV Inter-prov	V Tentative Int'l	VI Regularized Int'l	
Travel Search Index	○	●	○	○	○	○	YOY intra-provincial travel searches have been steadily increasing since the week ending April 12, 2020.
Accommodation Searches on OTA	●	○	○	○	○	○	YOY intra-provincial accommodation searches are at low levels but have been steadily increasing since the week ending April 12, 2020
Rate of Hotel Booking	●	○	○	○	○	○	YOY intra-provincial accommodation bookings are at low levels. Bookings had been steadily increasing since the week ending April 12, 2020, but declined during the week ending May 31, 2020, perhaps given a decline after the May long weekend.
Rate of Air Travel	/	/	/	○	○	○	Not applicable at this stage.
New COVID Cases	○	●	○	/	/	/	The number of weekly new cases in Saskatchewan for the week ending May 31, 2020 was 14. The peak occurred the week ending May 10, with 115 new cases.

Legend: Current phase ● Not there yet ○ Signal not applicable □

Manitoba	II Hyper Local	Increases in intra-provincial travel search and a low number of weekly cases, combined with low levels of intra-provincial accommodation searches that are fluctuating and bookings that are increasing at a steady pace, indicate that Manitoba is in the Hyper Local phase.
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Manitoba Assessment Summary:

	Phase						Analysis
	I COVID-19 Response	II Hyper Local	III Regional	IV Inter-prov	V Tentative Int'l	VI Regularized Int'l	
Travel Search Index	○	●	○	○	○	○	YOY intra-provincial travel searches have been steadily increasing since the week ending April 12, 2020. Travel searches for the week ending May 31, 2020 have nearly recovered to 2019 levels.
Accommodation Searches on OTA	●	○	○	○	○	○	YOY intra-provincial accommodation searches are at low levels. Searches had been steadily increasing since the week ending April 12, 2020, but have been fluctuating over the past 3 weeks.
Rate of Hotel Booking	●	○	○	○	○	○	YOY intra-provincial accommodation bookings are at low levels. Bookings had been steadily increasing since the week ending April 12, 2020, but declined during the week ending May 31, 2020, perhaps given a decline after the May long weekend.
Rate of Air Travel	/	/	/	○	○	○	Not applicable at this stage.
New COVID Cases	○	●	○	/	/	/	The number of weekly new cases in Manitoba for the week ending May 31, 2020 was 3. Manitoba has had 5 weeks in a row with less than 10 new cases.

Legend: Current phase ● Not there yet ○ Signal not applicable □

Ontario	I COVID-19 Response	Moderate to low increases in intra-provincial travel search and a relatively high number of weekly cases, combined with intra-provincial accommodation searches that are plateaued at a very low level and bookings that are increasing at a slow pace, indicates that Ontario is in the COVID-19 Response phase.
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Ontario Assessment Summary:

	Phase						Analysis
	I COVID-19 Response	II Hyper Local	III Regional	IV Inter-prov	V Tentative Int'l	VI Regularized Int'l	
Travel Search Index	●	○	○	○	○	○	YOY intra-provincial travel searches are at very low levels but have been steadily increasing since the week ending April 12, 2020.
Accommodation Searches on OTA	●	○	○	○	○	○	YOY intra-provincial accommodation searches are at very low levels and have plateaued since the week ending April 5, 2020.
Rate of Hotel Booking	●	○	○	○	○	○	YOY intra-provincial accommodation bookings are at very low levels. Bookings had been steadily increasing since the week ending April 12, 2020, but declined during the week ending May 31, 2020, perhaps given a decline after the May long weekend.
Rate of Air Travel	/	/	/	○	○	○	Not applicable at this stage.
New COVID Cases	●	○	○	/	/	/	The number of weekly new cases in Ontario for the week ending May 31, 2020 was 2,359. This represents a decrease in the number of new cases compared to the week ending May 24.

Legend: Current phase ● Not there yet ○ Signal not applicable □

Quebec	I COVID-19 Response	While it remains at low levels, a sharp increase has been observed for intra-provincial travel search in the current week. A relatively high number of weekly cases, combined with low levels of intra-provincial accommodation searches and bookings, indicates that Quebec is in the COVID-19 Response phase.
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Quebec Assessment Summary:

	Phase						Analysis
	I COVID-19 Response	II Hyper Local	III Regional	IV Inter-prov	V Tentative Int'l	VI Regularized Int'l	
Travel Search Index	●	○	○	○	○	○	YOY intra-provincial travel searches are at low levels but have been steadily increasing since the week ending April 12, 2020, with a sharp increase the week ending May 31, 2020.
Accommodation Searches on OTA	●	○	○	○	○	○	YOY intra-provincial accommodation searches are at low levels but have started to increase steadily since the week ending May 17.
Rate of Hotel Booking	●	○	○	○	○	○	YOY intra-provincial accommodation bookings are at very low levels but have been steadily increasing since the week ending April 12, 2020.
Rate of Air Travel	/	/	/	○	○	○	Not applicable at this stage.
New COVID Cases	●	○	○	/	/	/	The number of weekly new cases in Quebec for the week ending May 31, 2020 was 3,648. This is the fourth week in a row of a declining number of new cases.

Legend: Current phase ● Not there yet ○ Signal not applicable □

New Brunswick	II Hyper Local	Increases in intra-provincial travel search and a low number of weekly cases, combined with low levels of intra-provincial accommodation searches and bookings that are increasing at a steady pace, indicate that New Brunswick is in the Hyper Local phase.
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New Brunswick Assessment Summary:

	Phase						Analysis
	I COVID-19 Response	II Hyper Local	III Regional	IV Inter-prov	V Tentative Int'l	VI Regularized Int'l	
Travel Search Index	○	●	○	○	○	○	YOY intra-provincial travel searches have been steadily increasing since the week ending April 12, 2020.
Accommodation Searches on OTA	●	○	○	○	○	○	YOY intra-provincial accommodation searches are at low levels but have been steadily increasing since the week ending April 12, 2020.
Rate of Hotel Booking	●	○	○	○	○	○	YOY intra-provincial accommodation bookings are at low levels. Bookings had been steadily increasing since the week ending April 12, 2020, but declined during the week ending May 31, 2020, perhaps given a decline after the May long weekend.
Rate of Air Travel	/	/	/	○	○	○	Not applicable at this stage.
New COVID Cases	○	●	○	/	/	/	The number of weekly new cases in New Brunswick for the week ending May 31, 2020 was 11. Before this week, New Brunswick had marked 6 weeks in a row with less than 10 new cases.

Legend: Current phase ● Not there yet ○ Signal not applicable □

Nova Scotia	I COVID-19 Response	Although Nova Scotia has a low number of weekly cases, intra-provincial travel search remains at low but steadily increasing levels. Intra-provincial accommodation searches and bookings are also plateaued at very low levels. This indicates that Nova Scotia is in the COVID-19 Response phase.
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Nova Scotia Assessment Summary:

	Phase						Analysis
	I COVID-19 Response	II Hyper Local	III Regional	IV Inter-prov	V Tentative Int'l	VI Regularized Int'l	
Travel Search Index	●	○	○	○	○	○	YOY intra-provincial travel searches are at low levels but have been steadily increasing since the week ending April 12, 2020.
Accommodation Searches on OTA	●	○	○	○	○	○	YOY intra-provincial accommodation searches are at low levels and have plateaued since the week ending March 29, 2020.
Rate of Hotel Booking	●	○	○	○	○	○	YOY intra-provincial accommodation bookings are at very low levels but have plateaued since the week ending April 5, 2020.
Rate of Air Travel	/	/	/	○	○	○	Not applicable at this stage.
New COVID Cases	○	●	○	/	/	/	The number of weekly new cases in Nova Scotia for the week ending May 31, 2020 was 6. This is the lowest number of weekly new cases since the start of the pandemic in Nova Scotia.

Legend: Current phase ● Not there yet ○ Signal not applicable □

Prince Edward Island	II Hyper Local	Increases in intra-provincial travel search and a low number of weekly cases, combined with low levels of intra-provincial accommodation searches and bookings, indicate that Prince Edward Island is in the Hyper Local phase.
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Prince Edward Island Assessment Summary:

	Phase						Analysis
	I COVID-19 Response	II Hyper Local	III Regional	IV Inter-prov	V Tentative Int'l	VI Regularized Int'l	
Travel Search Index							YOY intra-provincial travel searches have been steadily increasing since the week ending April 12, 2020. Travel searches for the week ending May 31, 2020 have nearly recovered to 2019 levels.
Accommodation Searches on OTA							YOY intra-provincial accommodation searches are at low levels, plateauing since the week ending April 12, 2020.
Rate of Hotel Booking							YOY intra-provincial accommodation bookings are at very low levels, fluctuating since the week ending April 26, 2020.
Rate of Air Travel							Not applicable at this stage.
New COVID Cases							The number of weekly new cases in Prince Edward Island for the week ending May 31, 2020 was zero. Prince Edward Island has had 4 weeks in a row with no new cases.

Legend: Current phase Not there yet Signal not applicable

Newfoundland & Labrador	II Hyper Local	Increases in intra-provincial travel search and a low number of weekly cases, combined with low levels of intra-provincial accommodation searches and bookings, indicate that Newfoundland & Labrador is in the Hyper Local phase.
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Newfoundland & Labrador Assessment Summary:

	Phase						Analysis
	I COVID-19 Response	II Hyper Local	III Regional	IV Inter-prov	V Tentative Int'l	VI Regularized Int'l	
Travel Search Index	○	●	○	○	○	○	YOY intra-provincial travel searches have been steadily increasing since the week ending April 12, 2020, with a sharp increase the week ending May 31, 2020.
Accommodation Searches on OTA	●	○	○	○	○	○	YOY intra-provincial accommodation searches are at low levels but have been steadily increasing since the week ending April 12, 2020.
Rate of Hotel Booking	●	○	○	○	○	○	YOY intra-provincial accommodation bookings are at very low levels and had plateaued since the week ending April 12, 2020, before increasing slightly the week ending May 24 and remaining steady for the week ending May 31.
Rate of Air Travel	/	/	/	○	○	○	Not applicable at this stage.
New COVID Cases	○	●	○	/	/	/	The number of weekly new cases in Newfoundland & Labrador for the week ending May 31 was 1. Newfoundland & Labrador has had 6 weeks in a row with less than 10 new cases.

Legend: Current phase ● Not there yet ○ Signal not applicable □

Yukon	II Hyper Local	Increases in intra-territorial travel search and a low number of weekly cases, combined with low levels of intra-territorial accommodation searches and bookings that are fluctuating, indicate that Yukon is in the Hyper Local phase.
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Yukon Assessment Summary:

	Phase						Analysis
	I COVID-19 Response	II Hyper Local	III Regional	IV Inter-prov	V Tentative Int'l	VI Regularized Int'l	
Travel Search Index							YOY intra-territorial travel searches have been steadily increasing since the week ending May 10, 2020.
Accommodation Searches on OTA							YOY intra-territorial accommodation searches are at low levels, fluctuating since the week ending March 22, 2020.
Rate of Hotel Booking							YOY intra-territorial accommodation bookings are at very low levels, remaining at similar levels since the week ending March 29. There were several increases in April that were not sustained.
Rate of Air Travel							Not applicable at this stage.
New COVID Cases							The number of weekly new cases in Yukon for the week ending May 31, 2020 was zero. Yukon has had no new cases since the week ending May 3.

Legend: Current phase Not there yet Signal not applicable

Northwest Territories	III Regional	Although fluctuating, both intra-territorial travel search and intra-territorial accommodation bookings remain strong compared to other jurisdictions. These signals, combined with a low number of weekly cases, indicate that the Northwest Territories is in the Regional phase.
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Northwest Territories Assessment Summary:

	Phase						Analysis
	I COVID-19 Response	II Hyper Local	III Regional	IV Inter-prov	V Tentative Int'l	VI Regularized Int'l	
Travel Search Index	○	○	●	○	○	○	YOY intra-territorial travel searches sharply increased the week ending May 10, 2020 and have plateaued in the following weeks.
Accommodation Searches on OTA	○	●	○	○	○	○	YOY intra-territorial accommodation searches have fluctuated since the week of April 19, 2020.
Rate of Hotel Booking	○	○	●	○	○	○	YOY intra-territorial accommodation bookings sharply increased the week ending May 10, 2020, but declined during the week ending May 31, 2020, perhaps given a decline after the May long weekend.
Rate of Air Travel	/	/	/	○	○	○	Not applicable at this stage.
New COVID Cases	○	●	○	/	/	/	The number of weekly new cases in Yukon for the week ending May 31 was zero. Northwest Territories has had no new cases since the week ending April 19.

Legend: Current phase ● Not there yet ○ Signal not applicable □

Nunavut	I COVID-19 Response	Although Nunavut has recorded no confirmed COVID-19 cases, there have been only moderate to low increases in intra-territorial travel search. Intra-territorial accommodation searches are also fluctuating. This indicates that Nunavut is in the COVID-19 Response phase.
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Nunavut Assessment Summary:

	Phase						Analysis
	I COVID-19 Response	II Hyper Local	III Regional	IV Inter-prov	V Tentative Int'l	VI Regularized Int'l	
Travel Search Index	●	○	○	○	○	○	YOY intra-territorial travel searches are at very low levels, fluctuating since the week ending April 12, 2020.
Accommodation Searches on OTA	●	○	○	○	○	○	YOY intra-territorial accommodation searches have been fluctuating since the week ending May 10, 2020.
Rate of Hotel Booking	●	○	○	○	○	○	Data not available.
Rate of Air Travel	/	/	/	○	○	○	Not applicable at this stage.
New COVID Cases	○	●	○	/	/	/	Nunavut has not confirmed any cases to date.

Legend: Current phase ● Not there yet ○ Signal not applicable □

2. METHODOLOGICAL NOTES

I. Recovery Signals: The Recovery Measures are listed in their order of importance in understanding travel behaviour, with the primary measures in black and supporting measures in dark gray. A brief description of each measure is provided below.

Destination Canada has developed a framework to understand the phases of recovery of the travel market. These phases are:

- I. **COVID-19 Response:** Governments are responding with measures such as shelter in place and quarantines. Movement is restricted and travel is either not possible, desirable or encouraged.
- II. **Hyper Local Travel:** Some restrictions have been lifted and movement within local areas is possible. Governments will likely recommend that places ensure physical distancing while supporting local economies.
- III. **Regional Travel:** Travel by vehicle within a province/territory is possible and not discouraged.
- IV. **Inter-Provincial Travel:** Travel by multiple means (air, car, trains, etc.) within the country, across provincial/territorial boundaries.
- V. **Tentative International Travel:** Some international travel, such as family related or urgent business. There may be some leisure travel from less risk averse travellers seek to capitalize on reduced prices or increases availability. Airlines may not have restored international routes beyond major hubs.
- VI. **Regularized International Travel:** Regular international travel. Some business meetings and events are re-introduced, leisure travel is closer to pre-COVID-19 levels.

A filled-in dot signifies that Destination Canada assesses we are in that phase of travel. An empty dot means we have not yet reached that indicator, and the crossed off box would signify that the measure does not apply for that phase of recovery. Some measures are currently being developed and will be updated as further progress is made.

II. Description of the Measures

- **Travel Intent Search Index:** Google search engine queries for travel-related keywords in 2020 compared to 2019 searches, broken down by week (i.e. week of April 19, 2020 vs week of April 19, 2019). Available for each market's intra-provincial/territorial and inter-provincial/territorial travel search terms.
- **Rate of Accommodation Searches:** Weekly searches in 2020 for accommodation on a major online travel agency (OTA) against a rate of 2019 weekly searches, broken down by week. Available for each market's intra-provincial/territorial and inter-provincial/territorial accommodation searches. This is provided as a rate rather than a volume of searches.
- **Rate of Accommodation Bookings:** Accommodation bookings in 2020 on a major OTA against a rate of 2019 bookings, broken down by week. Available for each market's intra-provincial/territorial and inter-provincial/territorial accommodation bookings. This is provided as a rate rather than a volume of bookings.
- **Rate of Air Travel:** The volume of forward-looking 2020 air bookings by month to other provinces/territories versus 2019 air bookings, broken down by week. By comparing against the 2019 average of when travel was booked for and when it was booked, this establishes the amount of impact against each month of travel.
- **Weekly New COVID-19 Confirmed Cases:** The weekly total of new confirmed COVID-19 cases, as provided by the Government of Canada Health Infobase. Number of cases in the market and within other regions of Canada will likely be a determining factor for both governments allowing phased return of travel, as well as consumer confidence in traveling to a market.