

STATE OF TOURISM IN CANADA DURING COVID-19

DASHBOARD 2.0 – AUGUST 2020

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The 'State of Tourism in Canada during COVID-19' Dashboard 2.0, compiled by Twenty31 analysts, provides a monthly snapshot of recent global, regional and domestic tourism health and economic updates, and insights on the impact of COVID-19 on the travel and tourism industry's path to recovery. Insights are derived from a review of myriad global and Canadian media sources, associations, consultancies, and expert opinion from the tourism industry and government. We analyze the current state and future potential of key drivers of tourism recovery, including the most important tourism channels – source markets, airlines, accommodations, tourism businesses, tour operators, OTAs, and travellers.

This dashboard serves two objectives. 1) First, to identify activities and messages for Canada's tourism industry, and, 2) in particular, to inform timing of program and recovery activities and messages supporting the Canada Experiences Fund (CEF) and other programs to aid recovery of Canada's tourism economy.

ABOUT ELEVATING CANADIAN EXPERIENCES PROJECT

In partnership with provinces, territories, and regional partners, Elevating Canadian Experiences aims to support the development of capacity-building for organizations and small businesses operating in the culinary and shoulder/winter tourism sectors in Canada.

Delivered through the Canadian Experiences Fund, the objective of these workshops is to assist organizations in building awareness and capacity in high potential tourism growth opportunities.

Elevating Canadian Experiences goal is to work with each partnering association to identify key markets for growth, and support the development and execution of these workshops across the country.

For more information visit elevatingcanadianexperiences.ca

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KEY INSIGHTS

TWENTY31 INTERPRETATION OF FINDINGS

- GLOBAL: Recovery prospects have weakened as losses mount and recovery timelines are pushed out. The US travel industry is not expected to recover until 2024 and global airlines are generally in agreement. Looking forward we should expect more changes as visitor demand patterns evolve.
- GLOBAL: With the summer season in full swing European destinations have already faced challenges with managing visitors from multiple countries across the continent. In just weeks since reopening, multiple quarantines have been imposed and countries have discouraged visitation to particular regions and cities based on rising virus cases.
- CANADA: Almost all provinces/territories across Canada have now either formed a travel bubble or removed restrictions discouraging travel between provinces. Even as domestic tourism restarts, destinations and operators will need to recognize that health and safety is still top of mind for Canadian consumers and potential travellers.
- CANADA: Canada has been praised globally for its balanced approach in managing the spread of COVID-19 in comparison to other countries. This is promising for Canadian destinations as travellers are more likely to visit destinations that prioritize health and safety and are managing the virus well. On the other hand, resident sentiment towards visitors from outside Canada remains very low across the country.



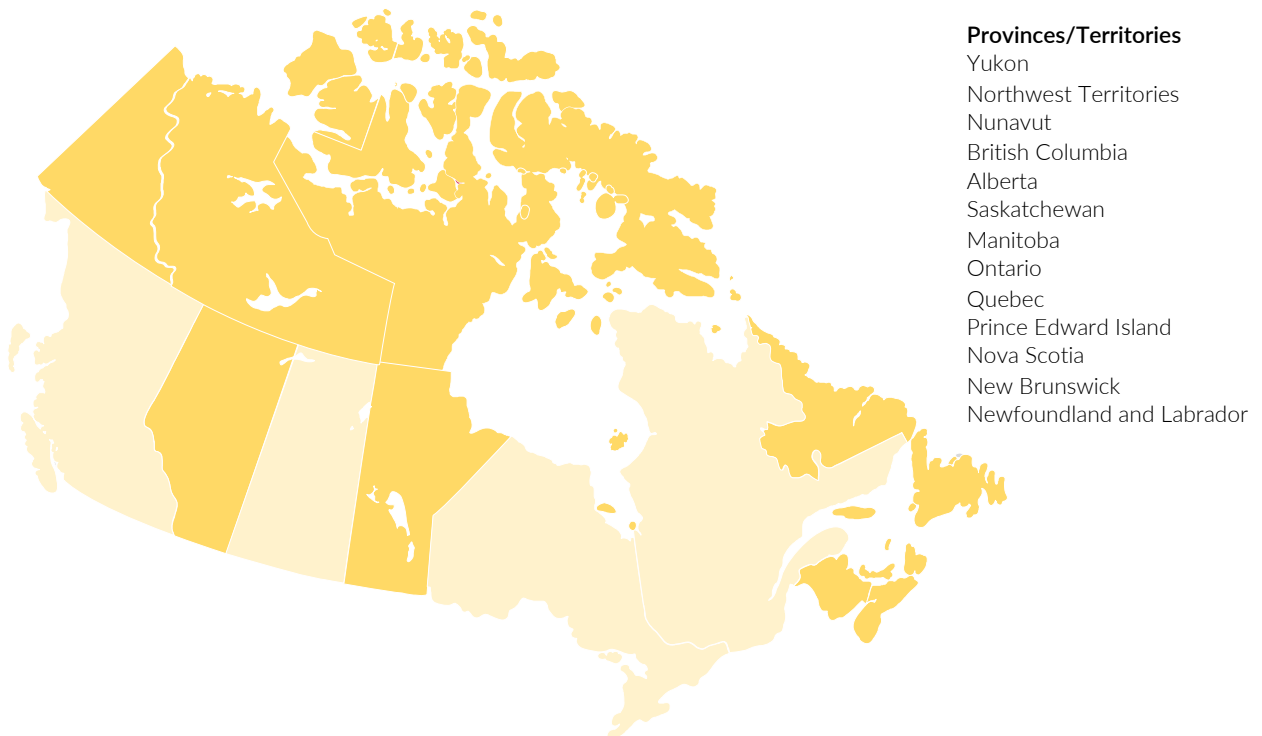
GLOBAL EASING OF TRAVEL RESTRICTIONS (HEAT MAPS)

Notes:

1. Highlighted destinations in the US and overseas are based on a selection of the largest outbound travel markets with available COVID-19 response data
2. The data presented is based on publicly available information and subject to change on a daily basis
3. The legend categories are based on a common framework developed from a synthesis of various leading jurisdictional data points
4. Phases highlighted in the tables indicate the current phase of re-opening based the provincial, state or country re-opening strategy

	PHASE 0: CURRENT STATE - No tourism; Non-essential business closed; Physical distancing
	PHASE 1: PRE-CONDITIONS FOR TOURISM - Limited opening of public spaces; Some emergence of local economy; Intra-provincial/state travel measures in place
	PHASE 2: SOME DOMESTIC TOURISM (BUBBLE) - Intranational border opening; Potential for domestic tourism bubbles
	PHASE 3: OTHER DOMESTIC TOURISM (BUBBLE) - Interprovincial/state tourism
	PHASE 4: SOME INTERNATIONAL TOURISM (BUBBLE) - National border opening; Some potential international tourism bubbles
	PHASE 5: NORMALIZED TOURISM - Domestic tourism; International tourism

COVID-19 RESTRICTIONS: CANADIAN PROVINCES/TERRITORIES



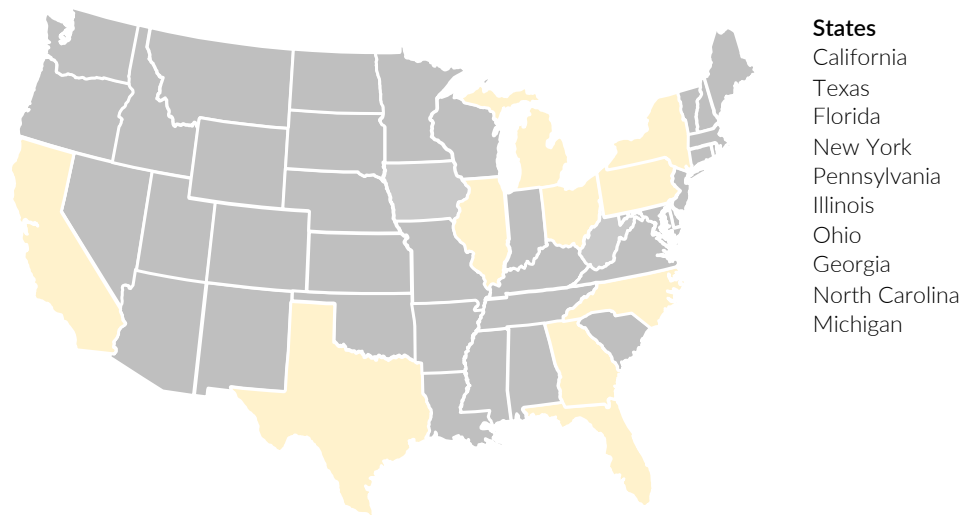
PROVINCE	TWENTY31 PHASE	CURRENT COUNTRY PHASE	COMMENTS
Ontario ¹	Phase 3	<p>STAGE 1 (May 19): Opening businesses that can immediately meet or modify operations to meet public health advice and workplace safety measures.</p> <p>STAGE 2 (June 12): Taking a regional approach to opening more businesses and services, as well as community, recreational and outdoor spaces, while emphasizing public health advice and personal responsibility.</p> <p>STAGE 3 (July 17): Reopening most remaining workplaces and community spaces, while carefully and gradually lifting restrictions. Public health advice and workplace safety guidance will remain in place and available. Large public gatherings will continue to be restricted.</p>	Ontario currently in its stage 3 of reopening with the exception of Windsor-Essex which may open according to reports by late July or early August.
Quebec ²	Phase 3	<p>PRELIMINARY PHASE (April 20): Garages; mining sector; landscaping; housing construction.</p> <p>PHASE 1 (May 4): Retail trade – stores with direct outside access.</p> <p>PHASE 2 (May 11): Civil engineering, infrastructure and commercial construction work; manufacturing - 50 employees + 50% of surplus employees per shift.</p> <p>PHASE 3 (May 20): Individual outdoor sports and leisure activities.</p> <p>PHASE 4 (May 25): Retail trade – stores with direct outside access; manufacturing – 100% of employees; museums and libraries (circulation desks).</p> <p>PHASE 5: Professional and therapeutic health care personal and beauty care services; shopping centres; accommodation, camping establishments and targeted tourist activities.</p> <p>PHASE 6 (June 25): Days camps; outdoor swimming pools; restaurants; shopping centres.</p>	Quebec is in its final stage of de-confinement.
British Columbia ³	Phase 3	<p>PHASE 1 (May 18): Essential travel only, physical distancing and business closures to help stop the spread of COVID-19.</p> <p>PHASE 2 (June 23): Essential travel only, physical distancing, restart of many businesses including those that were ordered closed.</p> <p>PHASE 3 (June 24): Smart and safe travel within the province, restart of in-person K-12 and post-secondary classes.</p> <p>PHASE 4 (Conditional on vaccine): International tourism, restart of large gatherings including concerts and conferences.</p>	British Columbia is currently in its phase 3 of reopening.

Alberta ⁴	Phase 2	<p>STAGE 1 (May 14): Some reopening of businesses and services, while protecting Albertans.</p> <p>STAGE 2 (June 12): Further reopening of businesses with continued protections in place. Relaxing some public gathering restrictions.</p> <p>STAGE 3 (TBD): Opening all workplaces and relaxing public gathering restrictions.</p>	Alberta is currently in its stage 2 of reopening.
Manitoba ⁵	Phase 2	<p>PHASE 1 (May 4): Priority elective surgeries and diagnostic screening can resume. Also, numerous non-essential businesses, mainly in the retail sector, are allowed to reopen; however, this measure is optional, and a business may choose not to reopen at this time.</p> <p>PHASE 2 (June 1): Restoring of outdoor drive-in events, childcare services, schools and day camps; outdoor recreation facilities and golf; travel to northern parks, campgrounds, cabins, lodges and resorts; bars, beverage rooms, brew pubs, microbreweries and distilleries.</p> <p>PHASE 3 (June 21): Increasing indoor and outdoor group gathering sizes and permitting larger group gatherings; easing self-isolation and northern travel restrictions on travellers entering Manitoba from Western Canada, the Yukon, the Northwest Territories, Nunavut and northwestern Ontario; removing occupancy limits for retail businesses, restaurants, bars, beverage rooms, brew pubs, microbreweries and distilleries; reopening permanent outdoor amusement parks.</p> <p>PHASE 4 (July 25): Phase 3 public health guidance continues to be in effect, including 14-day self-isolation requirements for those traveling into Manitoba from eastern and southern Ontario, Quebec and Atlantic Canada.</p>	Manitoba is currently in its phase 4 of reopening.

Note: Only the top five most populous provinces summarized in the table above.

COVID-19 RESTRICTIONS: TOP 10 MOST POPULATED STATES IN THE US

Note: States highlighted in grey indicate that they are not monitored for this dashboard



STATE	TWENTY31 PHASE	CURRENT COUNTRY PHASE	COMMENTS
California ⁶	Phase 3	<p>STAGE 1 (May 8): Stay at home except for essential and permitted activities</p> <p>STAGE 2 (May 25): Limit time outside the home and travel only for permissible activities, such as healthcare, food, outdoor exercise and recreation (individuals and households only)</p> <p>STAGE 3 (June 19): Travel for permissible activities, such as healthcare, food, and local or activities shopping related to open sectors.</p> <p>STAGE 4: Gradually resume remaining activities and travel.</p>	Most of the state is currently in its stage 3 of reopening but is at risk of reverting to Phase 2.
Texas ⁷	Phase 3	<p>PHASE 1 (April 27): Certain services and activities are allowed to open with limited occupancy.</p> <p>PHASE 2 (May 18): Restaurants may increase their occupancy to 50% and additional services and activities that remained closed under Phase I may open with restricted occupancy levels and minimum standard health protocols laid out by the Texas Department of State Health Services (DSHS).</p> <p>PHASE 3 (June 3): All businesses in Texas will be able to operate at up to 50% capacity, with very limited exceptions. Business that previously have been able to operate at 100% capacity may continue to do so, and most outdoor areas are not subject to capacity limits. Mandatory face coverings.</p>	Texas is currently in its phase 3 of reopening but is at risk of reverting to Phase 2.

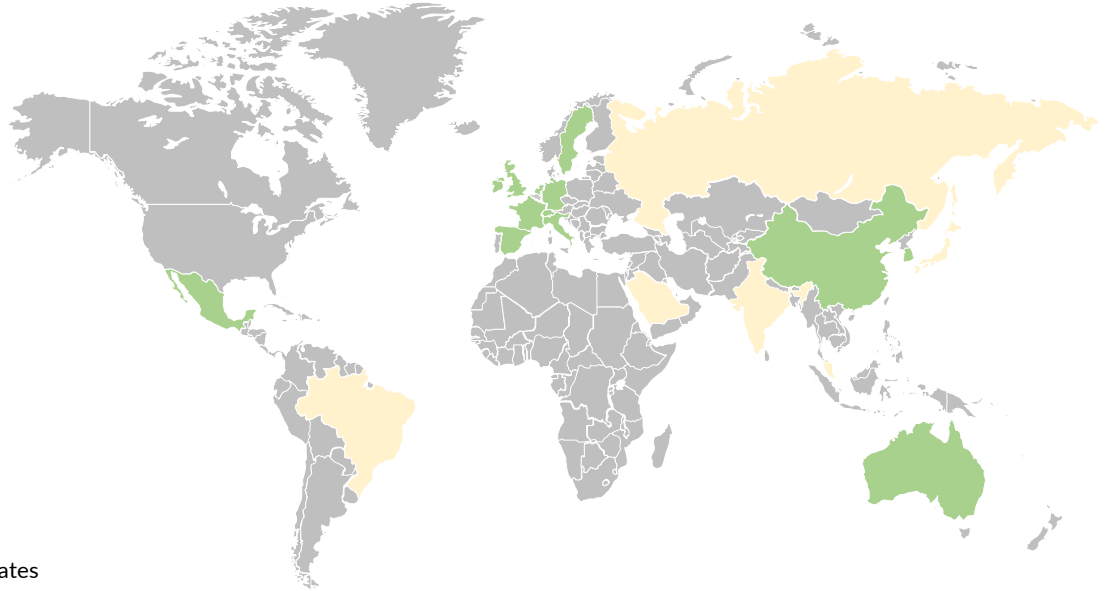
Florida⁸	Phase 3	<p>PHASE 0: Individuals are urged to avoid all non-essential travel and cruises, including to U.S. states and cities outside of Florida with community spread of COVID-19.</p> <p>PHASE 1 (May 1): Individuals should avoid all non-essential travel and cruises, including to U.S. states and cities outside of Florida with substantial community spread of COVID-19.</p> <p>PHASE 2 (June 5): Individuals may resume non-essential travel.</p> <p>PHASE 3: Employees should resume non-essential travel and adhere to CDC guidelines regarding isolation following travel.</p>	Florida is currently in phase 2 but is at risk of reverting to Phase 1.
New York⁹	Phase 3	<p>PHASE 1: Allowed construction, manufacturing, and wholesale supply-chain businesses to reopen, as well as many retailers for curbside pickup, in-store pickup, or drop off.</p> <p>PHASE 2: Allowed a greater range of businesses to reopen, including: offices, outdoor dining, places of worship (at 25 percent capacity), and storefront retailers and businesses in the professional-services, finance and insurance, administrative support, and real estate and rental-leasing industries.</p> <p>PHASE 3: Focuses on the hospitality industry, allowing restaurants and other food-service businesses to reopen for dine-in service at 50 percent capacity.</p> <p>PHASE 4: Allows schools, and low-risk arts, entertainment, and recreation businesses to reopen – all with social distancing required – but not movie theaters, shopping malls, or gyms. Gatherings of up to 50 people will also be allowed.</p>	Most of New York is in the fourth phase of reopening.
Pennsylvania¹⁰	Phase 3	<p>RED PHASE: Stay at home orders in place; large gatherings prohibited; masks are required in businesses; restaurants and bars limited to carry-out and delivery only; only travel for life-sustaining purposes encouraged.</p> <p>YELLOW PHASE (June 25): Stay at home order lifted for aggressive mitigation; large gatherings of more than 25 prohibited; in-person retail allowable, curbside and delivery preferable; restaurants and bars may open outdoor dining.</p> <p>GREEN PHASE (JULY 3): Large gatherings of more than 250 prohibited; restaurants and bars open at 50% occupancy; personal care services (including hair salons and barbershops) open at 50% occupancy and by appointment only; indoor recreation, health and wellness facilities, and personal care services open at 50% occupancy; all entertainment (such as casinos, theaters, and shopping malls) open at 50% occupancy; construction activity may return to full capacity with continued implementation of protocols.</p>	Pennsylvania is currently in its green phase of reopening.

Note: Only the top five Canadian inbound states summarized in the table above.

COVID-19 RESTRICTIONS: TOP GLOBAL OUTBOUND MARKETS (EXCLUDING US AND CANADA)

Countries

China
United Kingdom
France
India
Mexico
Brazil
Australia
Japan
Germany
South Korea
Russia
Italy
Malaysia
Netherlands
Saudi Arabia
Sweden
Switzerland
Spain
United Arab Emirates



COUNTRY	TWENTY31 PHASE	CURRENT COUNTRY PHASE	COMMENTS
China	Phase 4	Undefined	None
United Kingdom ¹¹	Phase 4	<p>STEP 1 (May 11): Encourages people back to their workplaces if they cannot work from home; 'unlimited exercise'; could rest and sit outside or play sports with members of their household</p> <p>STEP 2 (June 1): Allows people to leave the house for any reason. Up to six people from different households were allowed to meet outside, in both parks and private gardens, provided they observe social distancing rules; closed shops would reopen from 15 June.</p> <p>STEP 3 (July 4): Pubs, restaurants and hairdressers can open with social distancing measures in place. Two households can meet indoors with social distancing in place. Hotels, camping and other accommodation sites can reopen. Other facilities including outdoor gyms, museums and galleries, cinemas, places of worship, community centres and libraries can also reopen.</p>	Currently in step 3.

France ¹²	Phase 4	<p>PHASE 1 (May 11): Small shops and markets can open with restrictions on the amount of people, while bars, restaurants, cafes and large museums will remain closed.</p> <p>PHASE 2 (June 2): Reopening of cafés and restaurants in so-called green zones, where the virus is least actively circulating. Parks and restaurant terraces alone will reopen in Paris, which is considered an orange zone, and restrictions will be lifted on travel beyond the current 100km-radius restriction.</p> <p>PHASE 3 (June 22): All nursery schools, primary schools and junior high schools will be open and attendance will be mandatory.</p>	Currently in its final phase of reopening.
India ¹³	Phase 3	<p>PHASE 1 (June 8): Places of worship, malls and restaurants will now be permitted to reopen in most parts of the country.</p> <p>PHASE 2 (July 1): Domestic flights and train operation times to be expanded; Curfew will be enforced from 10 p.m. to 5 a.m.; Shops will now be allowed to have more than five people inside; schools, metro rail, theaters, bars, and gyms will all remain closed and large gatherings will continue to be banned until further notification.</p>	Currently in its phase 2 of reopening.
Mexico ¹⁴	Phase 4	<p>PHASE 1 (May 13): Economic activity resumes in 269 municipalities with low numbers of COVID-19 cases.</p> <p>PHASE 2 (May 18): Country prepares for national social distancing measures to be lifted on June 1.</p> <p>PHASE 3 (June 1): The government will assess readiness of states to reopen, by using the following color-coded system:</p> <ul style="list-style-type: none"> • Red: Only essential activities, as well as work in the mining, construction, and automotive industries, are allowed. • Orange: Limited nonessential activities may resume. Individuals vulnerable to COVID-19, such as the elderly and those with underlying health conditions, may return to work with strict social distancing measures in place. • Yellow: All essential and nonessential activities may resume. Restaurants, churches, museums, and theatres may reopen but at a reduced level. • Green: All restrictions will be lifted, and schools may reopen, although sanitary measures must be adhered to. 	Currently in its final green phase, however, due to an increase in cases in Mexico City some areas have been placed under red.

Note: Only the top five Canadian inbound markets summarized in the table above.

OVERVIEW

HEALTH IMPACT

- GLOBAL: Confirmed deaths caused by COVID-19 surpassed 650,000 globally, while worldwide cases climbed above 16.4 million¹⁵
- GLOBAL: World Health Organization director, Tedros Adhanom Ghebreyesus, reiterated that only with strict adherence to health measures, from wearing masks to avoiding crowds, would the world manage to COVID-19¹⁶
- CANADA: As of June 29, there have been a total of 112,672 confirmed cases and 8,874 reported deaths in Canada¹⁷
- CANADA: To keep Canadians safe, the Canada-US border will remain closed until at least August 21 with more extensions possible. Essential travel will continue to be allowed, and includes trade shipments, essential workers and approved temporary foreign workers¹⁸

KEY TAKEAWAY: Canada has been praised globally for taking a relatively balanced approach to tackling the virus; the curve has flattened and the economy has slowly restarted across the country.

ECONOMIC IMPACT

- GLOBAL: The latest forecast prepared for the U.S. Travel Association by Tourism Economics estimates \$505 billion in losses for the US travel industry for a total of \$81 billion in lost federal, state and local taxes by the end of 2020. The travel industry is not expected to recover until 2024¹⁹
- GLOBAL: The pandemic cost \$320 billion to the global tourism industry in lost revenue between January and May²⁰
- CANADA: Based on the Bloomberg Nanos Canadian Confidence Index, views that the economy will be stronger in the next six months jumped 3 percentage points to 23%. This is in line with recent indicators like retail spending, employment and inflation that suggests the economy is rebounding in the summer months. Confidence is lowest among Canadians 40 to 49 and highest among those aged 60 and over²¹
- CANADA: Canada's economy added 953,000 jobs in June amid the easing of more COVID-19 restrictions that allowed a growing number of Canadians to return back to work. Job gains include 488,000 full-time and 465,000 part-time positions, and 1.4 million Canadians are still working limited hours compared to February²²

KEY TAKEAWAY: New virus spikes and outbreaks have pulled traveller confidence downward in recent weeks. In a positive sign, Canada's economy added more jobs in June and Canadians have expressed more optimism about the economy rebounding in the next six months.

FOCUS CASE STUDY 1: SPAIN – NOT SO FAST!

- After months of strict lockdown Spain has been desperate to revive tourism and quickly rebuild struggling businesses
- The Spanish government announced a \$6.7 billion (CAD) plan to help the tourism industry. This included an initiative called the Tourism Sector Promotion Plan, which provides airlines with incentives to travel to Spain in an effort to attract the greatest number of international visitors²³
- Since June many of Europe's internal borders opened. As a solid source market, Britons in particular have been eager to spend their holidays in the country – in 2019 more than 18 million visited²⁴
- Following an upswing in COVID-19 cases in Spain's northeast, the UK abruptly announced a mandatory 14-day quarantine on travellers arriving back in the country. This is despite overall cases in Spain being lower than those in the UK

KEY TAKEAWAY: Spain's unfortunate loss of potential UK travellers highlights the ongoing challenges of regional travel bubbles and continent-wide planning. Destinations, businesses and travellers now have to consider the reality of reopening in an unstable environment where abrupt bans and quarantines can throw the best-laid plans into a state of chaos.

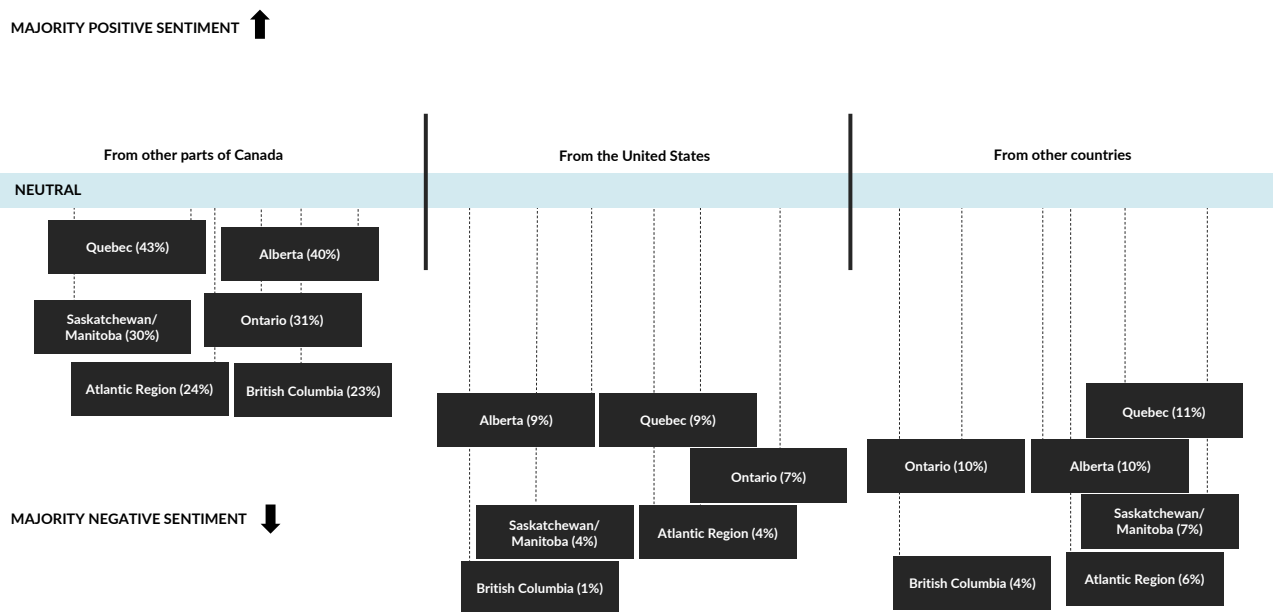
FOCUS CASE STUDY 2: SINGAPORE EYES MORE GREEN LANES²⁵

- Building on the success of a Singapore-China and Malaysia travel bubble/green lane for essential business travel the country is now exploring “reciprocal arrangements” with priority cities in South Korea, Australia, New Zealand, and countries in Europe
- Protocols are being re-examined to minimize duplications and reduce traveller inconvenience. For example, instead of undergoing two COVID-19 tests travellers flying between two countries in the arrangement can submit one mutually recognized test and mandatory 14-day quarantine on both ends could be removed. Singapore hopes to move toward an end-to-end suite of service from planning to after travellers have left the country

KEY TAKEAWAY: Reciprocal agreements have proven to be successful for Singapore, as they have progressed faster and easier than discussions and arrangements at the regional level. The country’s focus on the international business traveller is helping to reboot their economy and increase trade between key countries. This approach may prove to be an effective strategy for stable growth when compared to a priority focus on the international leisure market.

CANADIAN RESIDENT SENTIMENT TOWARD TOURISM FROM OTHER PARTS OF CANADA, THE U.S. AND OTHER COUNTRIES²⁶

In this section, we cover Canadian resident sentiment towards travellers from other provinces, the US and other countries. The graph is not to scale – it is indicative of the relative positioning of Canadian provinces vis-à-vis other provinces. Anything above the pink line indicates positive sentiment; anything below is negative.



KEY TAKEAWAY: Resident confidence in opening up communities to visitors remains subdued, down significantly from previous weeks in BC and Alberta. To build confidence, destinations and operators will need to build trust and strengthen community relationships. Locals need to be engaged and informed of the actions being taken to protect the health of their communities.

TRAVELLER BEHAVIOURS

- GLOBAL: The economic impact of COVID-19 remains modest with only 21% of US travellers citing the economy as influencing their travel plans over the next six months; this is a figure that has barely moved during the crisis to date²⁷
- CANADA: Within Canada, 18% of consumers feel safe flying right now; 28% feel safe staying in a hotel; and 15% are actively searching for travel deals²⁸

KEY TAKEAWAY: Health and safety is top of mind for potential travellers. To build travel demand, addressing consumers' emotional state and fears needs to be the priority for destinations and operators.

AVIATION

In this section, we present the latest updates from the top airlines in Canada, the US and from key Canadian global source markets.

AIRLINE	KEY UPDATES
CANADA	
Air Canada	Air Canada is now flying to a select network of domestic, transborder and international destinations. The airline announced it is discontinuing service to 30 domestic routes and closing eight stations at airports across the country ²⁹
West Jet	From July 15 through September 4, WestJet will offer operations to 48 destinations including 39 in Canada, five in the US, two in Europe, one in the Caribbean, one in Mexico ³⁰
Air Transat	Transat has resumed flights on select routes, effective July 23. The new flight schedule, running through October 31, includes destinations in Europe, the South, the US and Canada. Credits are now fully transferable, with no expiry date ³¹
US	
United	United Airlines is adding nearly 25,000 domestic and international flights in August as travel demand slowly starts to pick up, though the number of flights is down 40% from where it was last year ³²
Southwest	Southwest plans to fly about 70% to 80% of what it flew last year by the end of September. The airline will continue serving all of the US cities on its route map ³³
Delta	Delta Air Lines is postponing the resumption of 170 routes originally scheduled for August. The majority are now scheduled to restart in October ³⁴
American	American expects summer 2021 long-haul international capacity to be down 25% versus 2019. The airline will also discontinue several routes that were once popular leisure destinations but are expected to exhibit decreased demand ³⁵

INTERNATIONAL	
Aeromexico	Mexico's flagship airline filed for bankruptcy protection in the US ³⁶
Air China	No/insufficient information
Air France-KLM	Air France-KLM is increasing operations out of the Canadian market in July and August. This includes added flights as well as resuming service between Toronto and Paris for Air France, and flying out of Montreal, Vancouver and Calgary for KLM, for a total of 28 flights a week. This is about 37% of the 75 weekly flights originally scheduled for summer 2020 ³⁷
Air India	Air India has opened bookings for international flights to the US starting July 22 to bring home citizens. The state-run airline has announced 180 flights ³⁸
Alitalia	Alitalia said that it would be adding over 1,600 flights in August. Compared to July, this makes an increase of 24% more flights and double June. It will operate planes on 75 routes to 52 airports, of which 20 are in Italy and 32 abroad ³⁹
British Airways	British Airways has announced a raft of route resumptions for July, across its domestic, short-haul and long-haul networks. In the Americas and the Caribbean the carrier will resume flights to Barbados, Bermuda, Dallas, Kingston, Miami, Seattle and Toronto, joining existing services to San Francisco, Boston, Chicago, LA, New York JFK and Washington ⁴⁰
China Eastern	China Eastern launched a discount package that allows passengers to enjoy unlimited weekend flights in China through to the end of the year. The average passenger load factor on flights from Shanghai, to more than 10 destinations, rose by nearly 20% since launch ⁴¹
China Southern	China Southern's June passenger capacity was down 20.15% for domestic routes, 93.75% for regional routes and 93.75% for international routes compared to June 2019 ⁴²
Emirates	Emirates plans to restore services to a further six destinations from July 15 to August 15, bringing the network to 58 cities ⁴³
Etihad	Etihad Airways is beginning the process of resuming flights to 58 worldwide destinations from its Abu Dhabi hub. Subject to the lifting of international travel restrictions—the carrier is scheduled to resume service to destinations in North America, Europe, the Middle East, Asia and Australia ⁴⁴
Lufthansa	Swiss International Air Lines, which is part of the German-owned Lufthansa Group, resumed direct flights between Montreal and Zurich ⁴⁵
Japan Airlines	Japan Airlines is eyeing operating a full domestic schedule as early as October. The carrier announced that travel demand has recovered by approximately 30% since domestic travel restrictions were lifted ⁴⁶
Korean Air	Korean Air has begun resuming flights on some air routes to China to meet demand from students and business travellers ⁴⁷
Qantas	Qantas has removed the inventory for nearly all of its international flights until March 2021 ⁴⁸
Ryanair	Ryanair hopes to resume 70% of its normal schedule in September ⁴⁹
Qatar	Qatar plans to expand its network to over 430 weekly flights to more than 65 destinations by mid-July ⁵⁰

KEY TAKEAWAY: Although capacity has inched forward, with so little visibility into demand patterns many of the restored services, as announced by the airlines, will likely be pushed out further.

ACCOMMODATION & EVENTS

- GLOBAL: In a poll conducted by Global Travel Business Association travel buyers believe domestic business trips will return first, four in ten (44%) expect domestic travel to resume in the next 2-3 months and one in three expects domestic travel to resume in the next 6-8 months (34%)⁵¹
- GLOBAL: In Europe the absolute occupancy, Average Daily Rate (ADR) and Revenue Per Available Room (RevPAR) levels were up from May levels, but were the lowest for any June on record⁵²
- CANADA: Canadian hotel performance was up slightly for the week ending July 18. In a year-over-year comparison, the industry reported a 57.1% drop in occupancy to 33.3%, a decrease in ADR to \$122.94 and a 70.7% decrease in RevPAR to \$40.92. British Columbia and Manitoba reached above a 40% occupancy level⁵³

KEY TAKEAWAY: Hotel supply is fluctuating as properties reopen across markets. Within Canada, hotel performance is slowly improving and rising steadily.

CRUISE

- GLOBAL: A German cruise ship has set sail for the first time since the industry was shut down. Occupancy was limited to 60% so passengers could keep their distance from one another, but even that level was not reached⁵⁴

KEY TAKEAWAY: Cruise ship companies in Europe are beginning to test the waters with shorter and more controlled trips.

MAJOR TOUR OPERATORS

- GLOBAL: G Adventures has suspended tours departing up to and including September 30, 2020, as well as the October 21, 2020 departure of its G Expedition ship. This comes with the exception of 21 departures which are operating in Europe for travel that is possible between certain countries⁵⁵
- GLOBAL: Intrepid Travel is offering up a 10-step guide that other travel companies can use to go carbon neutral and beyond. It says it wants to encourage the industry to rebuild more sustainably amid the pandemic as part of its #RebuildResponsibly advocacy work⁵⁶

KEY TAKEAWAY: Major tour operators, such as Intrepid Travel, are looking beyond the pandemic and are encouraging travel companies to join efforts to build more sustainable tourism for the future.

SOURCES

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- 2 https://cdn-contenu.quebec.ca/cdn-contenu/sante/documents/Problemes_de_sante/covid-19/Plan_deconfinement/Deconfinement_planning_pandemic_covid-19.pdf?1590430413
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