

STATE OF TOURISM IN CANADA DURING COVID-19

DASHBOARD REPORT #3

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Twenty31's 'State of Tourism in Canada during COVID-19' dashboard is compiled by Twenty31 analysts to provide a weekly snapshot of recent key 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 multiple global and Canadian media sources, associations, think tanks, and expert opinion from the tourism industry and government. Insights are based on the current state and future potential of key drivers of tourism recovery including the most important tourism channels – tour operators, airlines, travellers, source markets and tourism business operators.

This document purpose is twofold. First to help determine key messages to Canada's tourism industry and in particular to help determine timing of program and recovery messages supporting the Canada Experiences Fund (CEF) and other programs in aid of recovery of Canada's tourism industry.

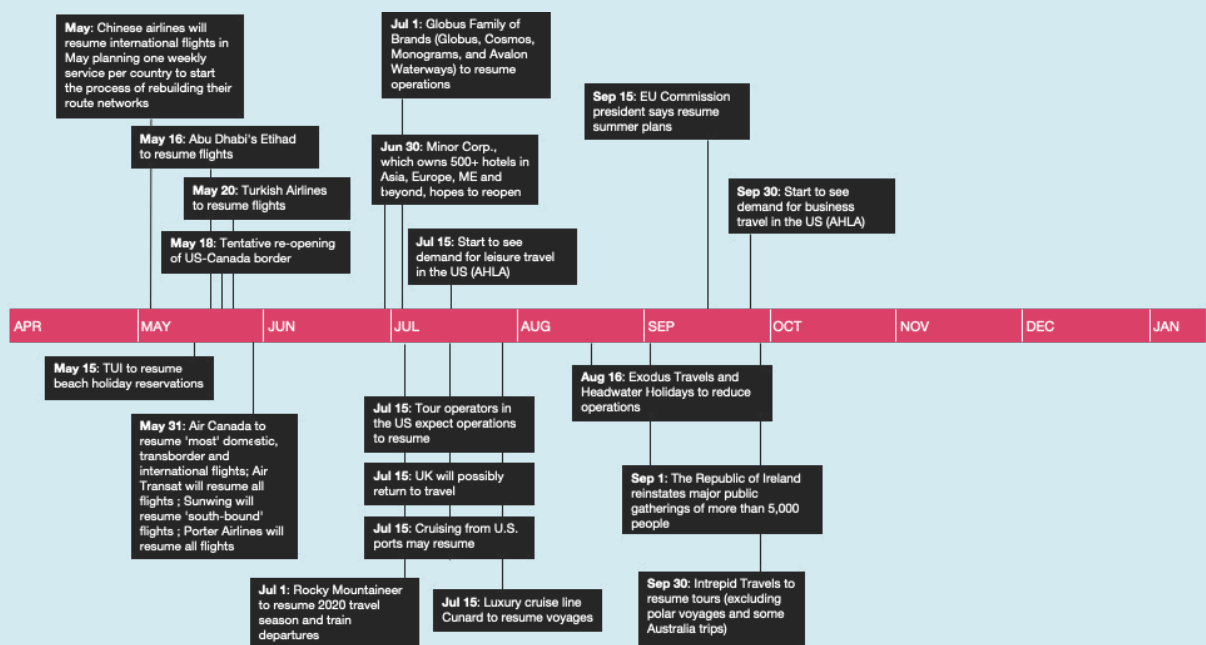
As signs of a return to the pre-conditions for tourism begin to emerge, this dashboard now includes an additional 'Case Study' section to inform readers of approaches that are being used by specific destinations across the globe to first begin to open their economies and then formulate their tourism re-emergence strategies.

KEY INSIGHTS TWENTY31 INTERPRETATION FROM MULTIPLE SOURCES

- GLOBAL: Initial glimmers of hope for the potential return of tourism to some destinations around the world are beginning to emerge. Lockdowns are being lifted in every continent, as a phased approach for return to business support a foundation for the return to tourism, including in some of the hardest hit countries like Italy.
- GLOBAL: It is becoming clear that the return to tourism will be a slow and gradual process characterized by a 'stage-gate' approach, determined by policymakers within each destination. For example, in New Zealand and Hong Kong, authorities have unveiled a phased evidence-based approach to tourism beginning with domestic travel.

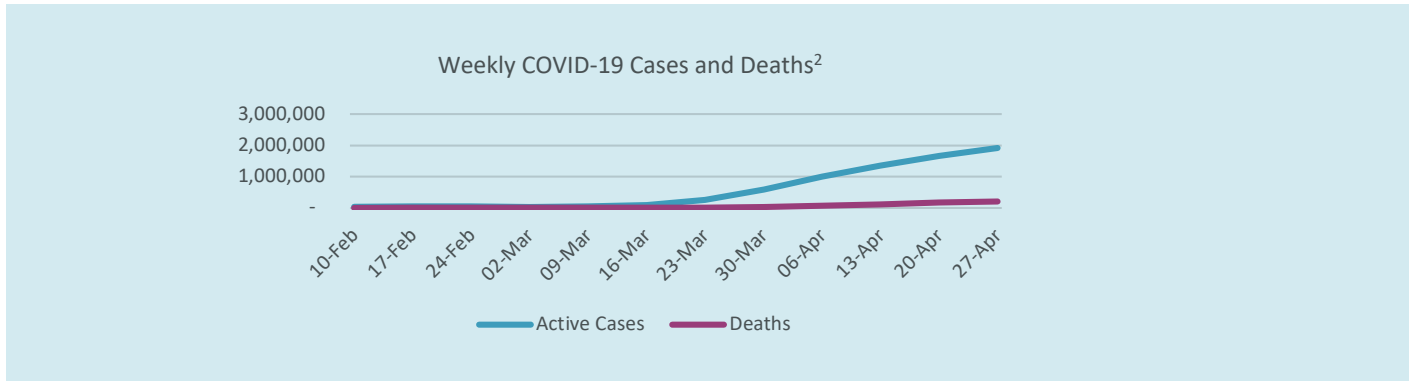
- GLOBAL: The easing of travel restrictions is creating opportunities for policymakers to support the idea of travel 'bubbles' between two or more destinations that have demonstrated low recent COVID-19 case incidents and a perceived lower risk to facilitate travel between destinations.
- GLOBAL: Events, accommodation providers, other tourism organizations and their associations are subscribing to new processes to regulate their sectors to assure visitors of their ability to host visitors post-COVID-19 peak.
- GLOBAL: Though travel bookings are relatively non-existent as demonstrated by a near cessation of activity by OTAs, there is indication that some traveller segments, beginning with the younger generation eager to get back to travel as soon as possible, have demonstrated an interest in engaging in almost every type of travel-related activity over the next six months.
- CANADA: In Canada, Prince Edward Island, New Brunswick and Saskatchewan, where net new cases have leveled off have announced plans to gradually reopen their non-essential businesses, providing pre-conditions for the potential to engage in some type of tourism this summer.
- CANADA: Indicators continue to point to an easing of travel restrictions gradually starting with intra-provincial travel (around mid / end of June / beginning of July), followed by regional travel—possibly within 'bubbles' between two provinces (July), followed by inter-provincial travel (mid-July to August), and then eventually international short-haul (late-August) and long-haul travel (into the fall) in some provinces.

CURRENT TIMELINE



OVERVIEW

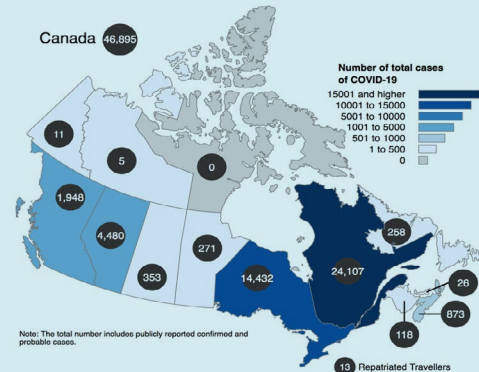
HEALTH IMPACT



- GLOBAL: Confirmed deaths caused by COVID-19 surpassed 190,000 globally, while worldwide cases climbed above 2.8 million – globally, the virus continues to peak
- GLOBAL: The World Health Organization continues to assess the global threat level as very high¹
- GLOBAL: Asia currently counts 478,667 cases, with the highest reporting cases in Turkey (112,261), Iran (91,472), China (83,938), India (29,435) and Saudi Arabia (18,811)³
- GLOBAL: The latest data from the UNWTO shows 100% of destinations now have restrictions in place. Of these, 83% have had COVID-19-related restrictions in place for four or more weeks and, as of April 20th, so far, no destination has lifted them⁴
- GLOBAL: Arnaud Bernaert, Head of Health and Healthcare, World Economic Forum, said: “For those European countries where governments have started to ease restrictions, a controlled transition can be achieved with a number of measures. First, there should be clear evidence that COVID-19 has transitioned to a controlled phase. Sufficient health and medical capacity needs to be in place in case of rebound and health resources for treating non-COVID patients must be taken into consideration.”⁵
- GLOBAL: New Zealand and Australian leaders are considering expanding Jacinda Arden’s “bubble” framework, currently in New Zealand, to something much larger: a travel bubble between the two countries⁶
- GLOBAL: Although deaths and cases are still rising globally, restrictions in some of the hardest-hit countries (Italy, Spain, France) are being lifted as new infections fall⁷
- GLOBAL: The Greek Minister of Tourism said that the country will prepare to welcome foreign tourists for a three-month season this year, between July and September. If the situation develops positively, then the “shoulder season” months of October and November might see an increased number of tourists in the country⁸
- CANADA: As of April 27, there have been a total of 45,791 confirmed cases and 2,489 reported deaths in Canada⁹

- CANADA: Ontario outlined a three-phase plan for reopening the economy which will be monitored by public health officials for two to four weeks. First it will open select workplaces and allow small gatherings, followed by allowing more workplaces and outdoor spaces¹⁰
- CANADA: Prince Edward Island, New Brunswick and Saskatchewan, where cases have ceased or slowed, have announced plans to gradually reopen, and other smaller-population provinces are expected to follow shortly.¹¹ New Brunswick seasonal campgrounds could open in two-to-four weeks as long as things stay on the right track¹²
- CANADA: Quebec is expected to announce a plan in phases — opening up strategic areas such as manufacturing and construction¹³
- CANADA: Health Canada officials said Canada's epidemic growth is slowing, with new cases doubling every 16 days, compared with a doubling every three days early in the pandemic¹⁴
- CANADA: "The measures we've taken so far are working. In many parts of the country, the curve has flattened," PM Justin Trudeau said at his daily briefing on Tuesday. "(But) if we lift measures too quickly, we might lose the progress we've made."¹⁵

KEY TAKEAWAY: Using an evidence-based approach, many countries and the provinces / territories across Canada, are beginning to cautiously lift physical distancing rules and lockdowns via multi-phased recovery plans. Additionally, in some jurisdictions leaders are engaging in strategic discussions to safely restart tourism. We will be monitoring these countries' return to tourism closely.



ECONOMIC IMPACT

- GLOBAL: The latest World Travel & Tourism Council (WTTC) analysis shows a sharp escalation in the economic loss to the world economy, up to US\$2.7 trillion of GDP, from US\$2.1 trillion just a month ago¹⁶
- GLOBAL: The approach in Asia so far – to encourage loan rollovers through regulatory forbearance and guarantees and provide cheap lending to banks – will help but may not be enough to save small and mid-sized firms, given banks' capacity and reluctance to take on this risk¹⁷
- GLOBAL: With the bulk of Convention and Visitor Bureaus funded by local hotel and tourism taxes, destination marketing organizations (DMOs) have seen funding virtually dry up, forcing deep budget cuts and layoffs¹⁸

- CANADA: “Overall, due to the lasting damage of the disruption, we think GDP will remain below its late-2019 level until early 2022. We do not see GDP returning to its pre-2020 trend path within the next few years,” said Stephen Brown, senior Canada economist at Capital Economics¹⁹
- CANADA: The primary sources of revenue for municipalities are at significant risk. Municipalities are facing severely reduced revenues from user levies as some fees are waived for safety reasons (public transit), facilities that generate fees are closed (recreational facilities), and activities that generate revenues may be temporarily halted during the pandemic (building permits and development charges)²⁰
- CANADA: A record high share of Canadians say their personal finances have worsened over the past year, rising last week to 42.3%, up from 38.2% a week earlier ²¹

KEY TAKEAWAY: Revised economic impact calculations show a more challenging road to recovery than previously thought. With limited funds available, municipalities, DMOs and small and medium-sized firms are forced to make difficult choices about their future – operations, programs and services.

FOCUS CASE STUDY: NEW ZEALAND - THE EMERGENCY OF THE TOURISM ‘BUBBLE’

- New Zealand and Australia have announced with the gradual lifting of lockdown restrictions, their two countries could resume bi-lateral travel, thereby creating a ‘bubble’
- While both countries are currently limiting international travel to only “critical” trips, the ‘bubble’ idea would be one of the first steps introduced once travel restrictions are eased
- With 2.6 million flying to and from their respective countries in 2019, this development will be welcome news for the travel and tourism industry

KEY TAKEAWAY: The ‘bubble’ concept could likely be applied to any jurisdiction in the world provided the pre conditions for containment and tourism exist. Intra-provincial and inter-provincial travel (i.e., within and between one than one province) is likely to restart in Canada via this ‘bubble’ approach.

AVIATION

- GLOBAL: Emirates is preparing to process 150,000 refund requests per month, compared to 35,000 per month previously. It aims to clear its backlog by early August, and will be using money from its cash reserves ²²
- GLOBAL: The airline industry and wider economy will suffer immeasurable damage if ministers press ahead with plans to quarantine travellers for 14 days after they arrive at British airports, airline bosses have warned ²³
- GLOBAL: Abu Dhabi's Etihad extends suspension of scheduled flights to at least May 16 ²⁴
- GLOBAL: Chinese airlines will resume international flights in May planning one weekly service per country to start the process of rebuilding their route networks ²⁵
- GLOBAL: Virgin Australia has confirmed it has entered voluntary administration - making it Australia's first big corporate casualty of the coronavirus pandemic. Before the shutdown, Virgin Australia had flown about 130 aircraft to 41 destinations ²⁶
- GLOBAL: When travel starts to return, Delta Air Lines CEO Ed Bastian predicts Delta will be a different airline. "Safety will not be limited to flight safety, but [will expand] to personal safety," Bastian said. "People will pay a premium on service excellence like never before." ²⁷
- GLOBAL: The International Air Transport Association (IATA) said that global airline passenger revenues could drop by US \$314 billion this year, a 55% decline compared to last year. IATA's Regional Vice President, Asia Pacific, Conrad Clifford said, "After the COVID-19 pandemic is contained, governments will need airlines to support the economic recovery, connect manufacturing hubs and support tourism. That's why they need to act now – and urgently – before it is too late." ²⁸
- GLOBAL: Airlines in Asia Pacific will see the largest revenue drop of US \$113 billion this year compared to last year. They are also expected to register a 50% fall in passenger demand this year compared to 2019 ²⁹
- GLOBAL: Analysts at Citigroup, predict that any European airline with a low-cost base and healthy balance sheet will head straight into a summer price war once travel restrictions ease and passengers start to book their holidays³⁰
- CANADA: Air Canada is continuing suspension of 'most' domestic, transborder and international flights until May 31 and international flights until June; WestJet suspended all US, Europe, Mexico, Central America and Caribbean flights through June 4; Air Transat is continuing suspension of all flights until May 31; Sunwing suspended all 'south-bound' flights until May 31.³¹ Swoop suspended all transborder and international flights until May 31.³² Porter Airlines suspended all flights until June 29³³
- CANADA: Porter Airlines President and CEO, Michael Deluce said in a news release, "While there are many promising signs about how COVID-19 is being contained, it is also clear that border restrictions, government-imposed stay-at-home orders and bans on non-essential travel will remain in place for many regions through much of May and into June."³⁴
- CANADA: WestJet has introduced seat distancing by leaving the middle seat empty during flights. The airline notes that "moving forward, from now until May 4, 2020, the middle seat on our Boeing 737s and 787 aircraft and every other seat on our Bombardier Q400 will be unavailable to book."³⁵

KEY TAKEAWAY: Airlines continue to be severely impacted by suppressed demand but are viewed as critical for global economy recovery. Recognizing this role, airlines have been busy encouraging customer loyalty, determining services and practices to enhance the visitor experience while in transit, and at the same time urging governments to consider the impact of restrictions on arrivals (self-isolation, quarantines) moving forward.

ACCOMMODATION & EVENTS

- GLOBAL: 38% of UK business events professionals stated September 2020 as the primary month when they expect to see both enquiries and bookings begin to increase, though some believe this will happen sooner, with 12% indicating July as the beginning of the recovery period³⁶
- GLOBAL: The US Travel Association announced the cancellation of its 2020 edition of IPW, the leading international inbound travel trade show, and rescheduled to 2021³⁷
- GLOBAL: New figures from the Business Events Council of Australia (BECA) show that the Australian economy is set to lose US \$22.6 billion in direct expenditure over the next 12 months due to 96% of business events scheduled for 2020 being cancelled or postponed. In response, BECA announced that it is working with the government on a Business Events Response & Recovery Framework³⁸
- GLOBAL: The Republic of Ireland has outlined a ban on major public gatherings of more than 5,000 people until September 1. It means no major festival, concerts, or sporting events will be able to go ahead in the country this summer³⁹
- GLOBAL: Betting on automation and artificial intelligence (AI), hotels have launched a slew of features to reduce operating costs. Self check-in kiosks, mobile check-in, chatbots, direct booking applications, contactless payments, as well as digital in-room dining services are becoming the new norm. Singapore Tourism Board and the Singapore Hotel Association recently launched the facial recognition E-Visitor Authentication System (EVA), which enables participating hotels to verify guests and clear the way for a faster and smoother check-in experience⁴⁰
- GLOBAL: Marriott has created a Global Cleanliness Council, staffed by senior leaders as well as food science and infectious disease experts. The goal is to develop “the next level of global hospitality cleanliness standards, norms and behaviours that are designed to minimize risk and enhance safety for consumers and Marriott associates alike,” according to a press release⁴¹
- GLOBAL: Data from Airbnb shows the number of domestic bookings in China for the first half of April were up more than 200% compared with the same period in March⁴²
- GLOBAL: Europe hotel performance is forecasted to see recovery in 2021, including double-digit increases in RevPAR (+41%)⁴³

- GLOBAL: The Asia Pacific hotel industry reported all-time lows in the three key performance metrics during March 2020. RevPAR declined 66.7% and occupancy was just 28.3%⁴⁴
- CANADA: In Canada, for the week ending April 18, average RevPAR declined 84.8%. Among the provinces and territories, Quebec experienced the largest drop in occupancy (-90.0% to 6.2%), which resulted in the steepest decrease in RevPAR (-92.9% to CAD6.47) and British Columbia posted the largest decline in ADR (-39.9% to CAD104.67)⁴⁵

KEY TAKEAWAY: Due to bans on large gatherings, the leisure and business events sector and hotels are expecting to be negatively impacted until at least September 2020. In the meantime, partnerships and collaborations – such as between government, tourism authorities and business associations – are developing to create new systems and processes to ease health fears and logistical challenges.

CRUISE

- GLOBAL: The parent company of Norwegian Cruise Line, Oceania Cruises and Regent Seven Seas Cruises said that as of March 31, it had \$1.8 billion in advanced ticket sales, which included approximately \$850 million for previously announced cancellations through June 30, and about \$350 million for cruises scheduled for the remainder of 2020⁴⁶
- GLOBAL: Should the global cruise suspension stretch 90 days, the worldwide impact would be an economic loss of \$32 billion, 222,000 jobs and \$11 billion in wages⁴⁷
- GLOBAL: Infrared fever screening, doctor's certificate of fitness for those over 70, greatly enhanced cabin/public room sanitizing, and twice-daily temperature checks for crew are among the actions Genting Cruise Lines plans before beginning service in the 'near future.'⁴⁸
- GLOBAL: According to investment analysts at UBS, cruise bookings for 2021 actually increased 9% in March versus the same period last year. Though forward cruise bookings to the Mediterranean are still underperforming, those to Asia Pacific and Alaska are up more than usual, with the Caribbean also performing well⁴⁹
- GLOBAL & CANADA: Luxury cruise line Cunard, announced today that it will be extending the pause to voyages until July 31⁵⁰

KEY TAKEAWAY: Analysts are seeing a small glimmer of hope for cruising, as bookings for 2021 increase versus the same period last year – signalling optimism and confidence in the sector.

ONLINE TRAVEL AGENCIES (OTAs)

- GLOBAL: Barr Diller, Chairman of Expedia Group confirms that business has transitioned from \$250 million in sales per day to nearly no revenue, although he said the company has the cash to make it through the pandemic⁵¹

KEY TAKEAWAY: Although OTAs are currently in a holding state due to travel restrictions, when tourism resumes there may be a unique role for these players to quickly curate products based on altered traveller priorities such as cleanliness, nearby medical facilities, number of rooms etc.

MAJOR TOUR OPERATORS

- GLOBAL: Tour operators expect a significant decline in revenue during 2020, as more than half are forecasting a drop of at least 50% year over year. However, they are upbeat about business in 2021⁵²
- GLOBAL: Intrepid Travel has suspended all tours globally (excluding polar voyages and some Australia trips) until at least September 30, 2020⁵³
- GLOBAL: Globus Family of Brands is suspending all operations until July 1. That includes brands Globus, one of the world's largest tour operators, Cosmos, Monograms, and Avalon Waterways⁵⁴
- GLOBAL: Insight Vacations has released its 2021 Preview Collection and is offering the itineraries now with 2020 prices to give travellers peace of mind when booking further out⁵⁵
- CANADA: Rocky Mountaineer has extended the delay of its 2020 travel season and suspend all train departures until July 1. The season was scheduled to start on April 13⁵⁶
- GLOBAL: Shannon Stowell, CEO of the Adventure Travel Trade Association (ATTA) believes that adventure travel may be different in the future, "Smaller groups will be in demand and possibly groups who all know each other versus with strangers. Seating arrangements for distance, assurance of medical facilities near the trip, clarity around hygiene, and possibly confirming that people aren't sick when they show up."⁵⁷
- CANADA: According to the Indigenous Tourism Association of Canada (ITAC), 90% of businesses across the country could be affected. A stimulus package worth \$306.8 million has been created to help prevent a collapse of the Indigenous tourism industry⁵⁸
- CANADA & GLOBAL: Several food tour companies, including the Culinary Adventure Co. in Toronto, Unexpected Atlanta and Milwaukee Food Tours, are offering "food tours in a box," which contain meals and snacks from participating restaurants and are delivered to clients' homes⁵⁹

KEY TAKEAWAY: With continued cancellations and suspended operations, tour operators are bracing for a challenging year ahead. Many operators have shifted into planning mode and are looking at ways to adjust their business models and practices in the short-term, as well as in the medium and long-term to support financial sustainability and protect against future shocks.

TRAVELLER BEHAVIOURS

- GLOBAL: Major attractions in Europe – with ample marketing dollars and brand awareness – saw a steep decline in searches as soon as shelter-in-place guidelines were announced⁶⁰
- GLOBAL: Early indications reveal that younger US adults will be the first to travel again as evidenced by their intent to engage in almost every type of travel-related activity during the next six months⁶¹
- GLOBAL: For upcoming leisure vacations, pushing trips into the future was the most preferred course of action for all traveller age groups in the UK⁶²
- GLOBAL: French travellers exhibit optimism that they will be able to take upcoming trips at a later date as more people choose to postpone over cancel, ranging from 34% of 55+ to 40% of 18-34-year-olds⁶³
- GLOBAL: Hong Kong Tourism Board unveiled a three-phase plan to reinvigorate tourism. The plan builds on insights, including: - Domestic travel will be the major preference shortly after the pandemic. - Regional competition will be fiercer than ever, as the tourism authorities and travel trade of various destinations gear up for intensive promotions. - Green tourism and the outdoors will be favoured, while short-haul travel will be preferred due to financial and holiday leave constraints⁶⁴
- GLOBAL: A majority of people in 12 out of 14 major countries say they are going to be nervous about leaving their homes if businesses are allowed to reopen and travel resumes. This sentiment is highest in India (78%), Japan (77%), China (72%), the UK and Mexico (71%) and Brazil and Canada (68%)⁶⁵
- GLOBAL: Women are more likely to say they expect to change the types of travel destinations they choose to visit post-COVID-19⁶⁶
- GLOBAL: As American travellers prioritize staying safe from infection over the coming six months, most want businesses like restaurants, malls, theme parks and sports venues to provide hand sanitizer and disinfectant wipes, as well as clearly explain their cleaning / sanitizing procedures⁶⁷
- CANADA: Canadians show greater interest for live sports and outdoor events than Americans, who show far greater reticence when it comes to attending events based on the sheer number of attendees⁶⁸

KEY TAKEAWAY: Travellers are still expressing concern and nervousness about their own health and safety and that of others. However, they are beginning to envision future travel with new priorities and service expectations in mind.

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