

# STATE OF TOURISM IN CANADA DURING COVID-19

DASHBOARD REPORT #5

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The 'State of Tourism in Canada during COVID-19' dashboard is compiled by Twenty31 analysts to provide a weekly 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 – tour operators, OTAs, airlines, tourism businesses, travellers, and source markets.

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

**The dashboard now includes a new 'Global Easing of Travel Restrictions' section that tracks, in a visual format, announcements made by select national and provincial/state policymakers on the easing of travel restrictions in their jurisdictions.**

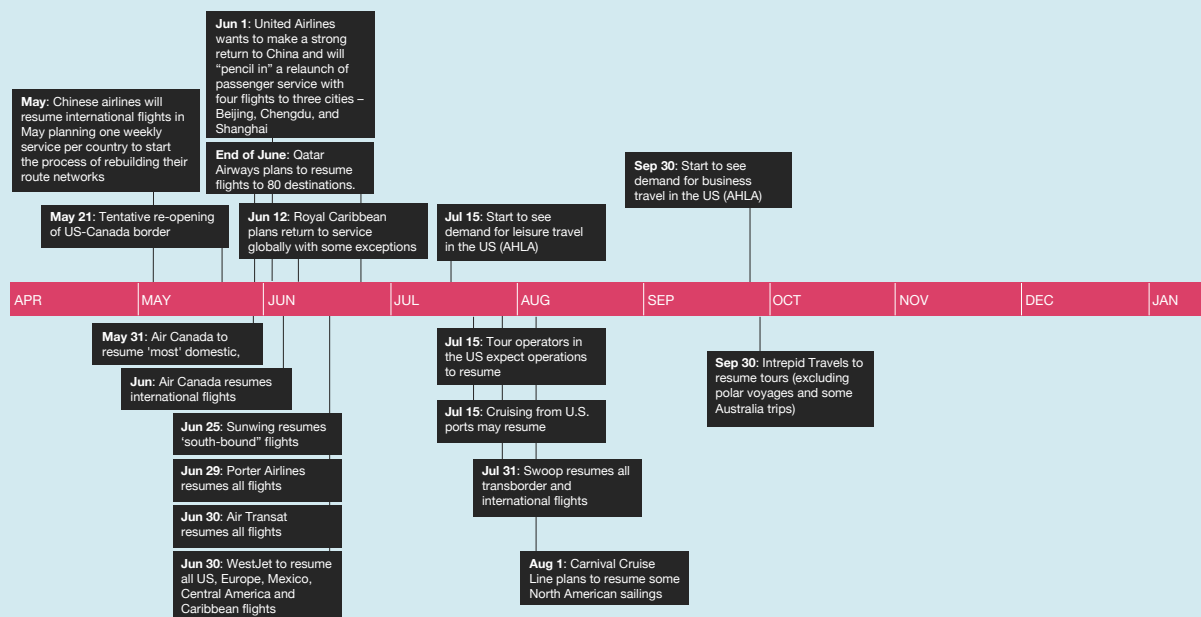
## KEY INSIGHTS TWENTY31 INTERPRETATION FROM MULTIPLE SOURCES

- GLOBAL: Reports of additional destinations transitioning from their current state of no tourism to establishing the pre-conditions of tourism (i.e., limited opening of public spaces, some emergence of local economy and national or intra-provincial/state travel) are beginning to emerge. Only a handful of destinations have taken steps required to move to the next phase of tourism resumption by creating some domestic tourism bubble (i.e., some national border opening and/or state/provincial border opening), such as in China and select other destinations.
- GLOBAL: While global destinations are generally shifting from peak COVID-19 to what can be regarded as the beginning of the pandemic's plateau, there is no common or set standard path to tourism resumption

across destinations – individual destinations are laying out unique plans with little to no coordination across destinations.

- **GLOBAL:** The diverse approaches that governments are taking to balance support for tourism with managing the health impact of the virus is causing confusion among tourism stakeholders including government partners, tourism businesses and consumers. Additional clarity from governments on their policies to establish the pre-conditions of tourism and beyond, within their own destinations would alleviate uncertainty, instill greater resident confidence to travel, and support a faster return to tourism.
- **GLOBAL:** Countries that are reopening to increased travel, such as China and South Korea, are seeing some resurgence in cases, suggesting a rationale to develop more deliberate and gradual reopening policies.
- **CANADA:** Canadian consumer confidence is showing signs of improvement despite worries of a continued global economic slump. Consumer confidence is likely growing due to the cautious announcements, across several Canadian provinces/territories, of concerted containment and lifting of lock-down policies.
- **CANADA:** New post-COVID sentiment among Canadian residents is that rural communities are not yet open to visitors. We are seeing somewhat negative resident sentiment to tourism in cottage country in Ontario, Vancouver Island and rural and indigenous communities across Canada, suggesting an additional barrier to a return to tourism.

## CURRENT TIMELINE



## GLOBAL EASING OF TRAVEL RESTRICTIONS

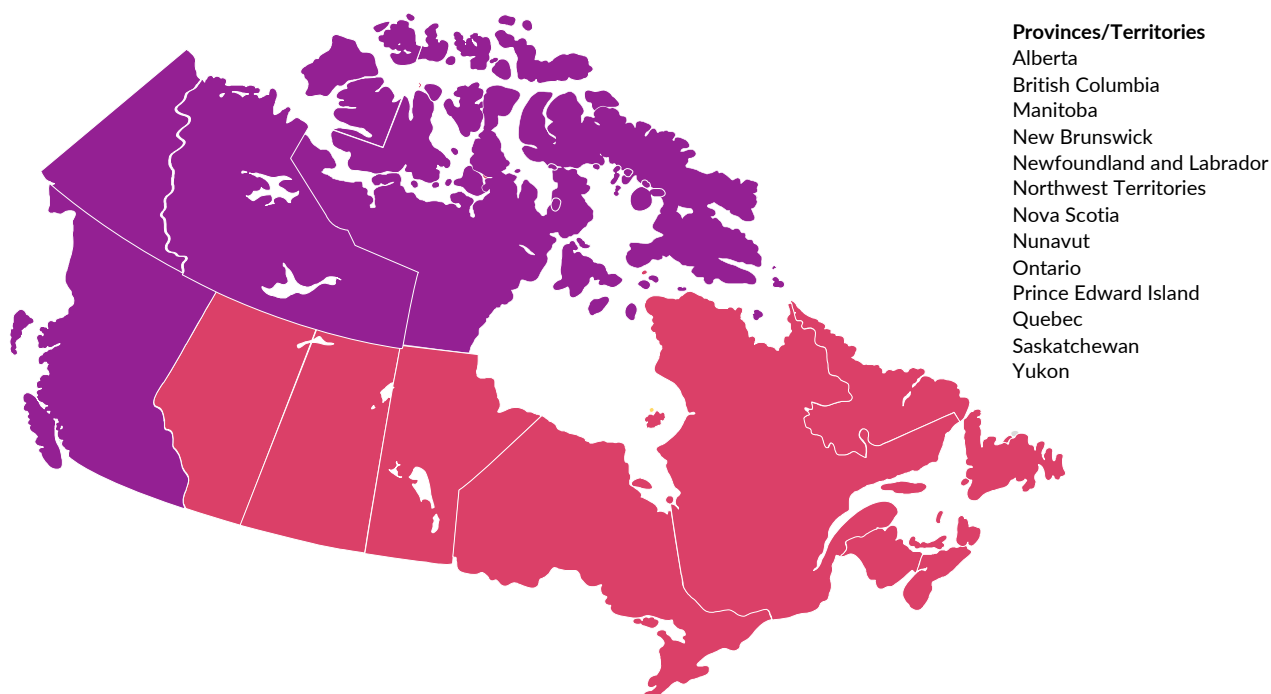
### Notes:

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

Note: The following maps represent the current stage of reopening and recovery measures that have been implemented in each jurisdiction. Over the coming weeks our team of analysts will continue to closely monitor updates from governments across Canada and globally in select markets.

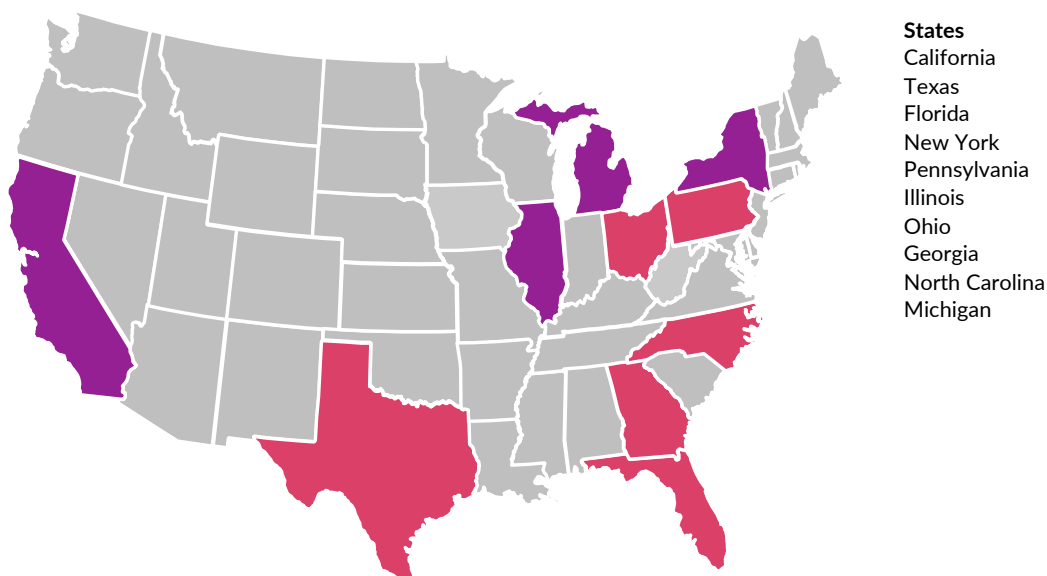
	<b>CURRENT STATE:</b> No tourism; Non-essential business closed; Physical distancing
	<b>PRE-CONDITIONS FOR TOURISM:</b> Limited opening of public spaces; Some emergence of local economy; Intra-provincial/state travel measures in place
	<b>SOME DOMESTIC TOURISM (BUBBLE):</b> Intrnational border opening;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

## COVID-19 RESTRICTIONS: CANADIAN PROVINCES/TERRITORIES



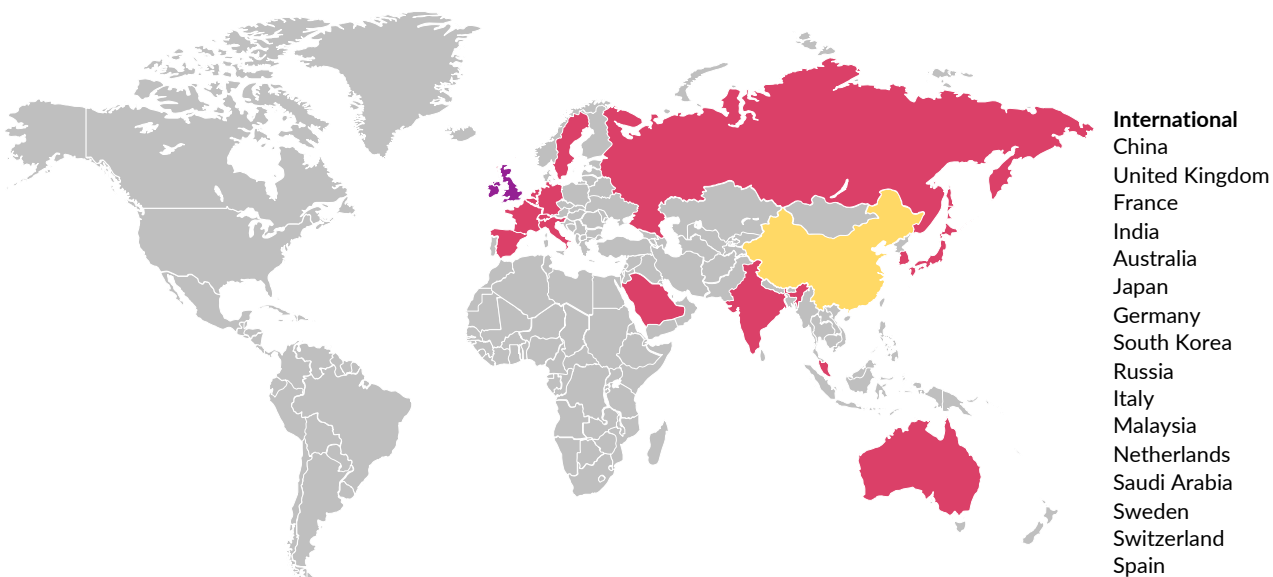
## COVID-19 RESTRICTIONS: TOP 10 MOST POPULATED STATES IN THE US

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



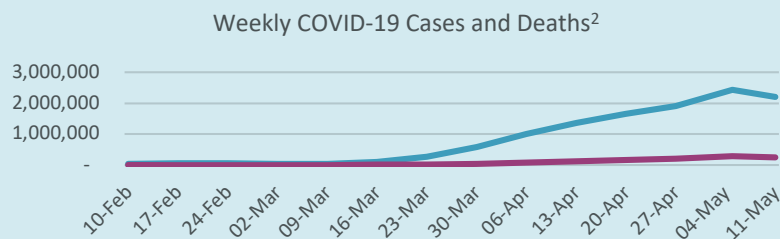
## COVID-19 RESTRICTIONS: CANADA'S TOP SOURCE MARKETS AND TOP GLOBAL OUTBOUND MARKETS (EXCLUDING US)

Note: Data is not readily available for Mexico and Brazil



## OVERVIEW

### HEALTH IMPACT



- GLOBAL: Confirmed deaths caused by COVID-19 surpassed 286,000 globally, while worldwide cases climbed above 4.2 million; globally, the virus seems to have peaked in terms of weekly active cases and deaths
- GLOBAL: The World Health Organization continues to consider the outbreak a significant global public health emergency<sup>1</sup>
- GLOBAL: Renewed outbreaks in South Korea and China show continued risk as more countries seek to reopen. Before the latest cases, the number of new infections had slowed to a trickle, with local transmission appearing to be halted<sup>3</sup>
- GLOBAL: European countries continue to ease lockdown restrictions, including the UK, Switzerland, Spain and France, where people will be able to venture outside without a permit for the first time in weeks<sup>4</sup>
- GLOBAL: Even as cases continue to rise, the US has started to reopen their state economies. Those include places like Alaska and Montana, which have fewer than 700 known cases, and states like Indiana and Georgia, which have more than 20,000. Ohio, New Mexico and Louisiana are among the places expected to partly reopen in the days ahead<sup>5</sup>
- CANADA: BC health officials are adamant the Canada-US border should not reopen to visitors anytime soon as the agreement currently banning non-essential travel is set to expire May 21<sup>6</sup>
- CANADA: Across the country, provinces have begun to slowly lift measures put in place to stem the spread of COVID-19. On Monday, some schools in Quebec opened their doors, while businesses in Ontario were permitted to open for curbside pickup<sup>7</sup>
- CANADA: As of May 10, there have been a total of 68,848 confirmed cases and 4,871 reported deaths in Canada<sup>8</sup>
- CANADA: Prime Minister Justin Trudeau said in a briefing on May 9 that despite promising indicators like a flattening rate of daily cases in many provinces, Canada is “not in the recovery phase yet” and any reopening should be gradual<sup>9</sup>

**Countries and the provinces/territories across Canada have been cautiously announcing and implementing beginning phases of their reopening plans. Governments are closely monitoring the risk of new outbreaks, and expect this data to guide future decisions on travel.**

## ECONOMIC IMPACT

- GLOBAL: The International Monetary Fund said that the global economic outlook has worsened since its latest forecast three weeks ago and the world can expect more waves of financial market turbulence<sup>10</sup>
- GLOBAL: Mark Zandi, the chief economist at Moody's Analytics announced that a second wave of COVID-19 cases would quash hopes for a swift recovery and push the US into a depression<sup>11</sup>
- GLOBAL: International tourism was down 22% in Q1 and could decline by 60-80% over the whole year. This could put 100 to 120 million direct tourism jobs at risk and result in export revenue losses of US\$910 billion and US\$1.2 trillion<sup>12</sup>
- GLOBAL: The US Bureau of Labor Statistics reported that food and drinking establishments, rather than hotels, that were most impacted in April. Restaurants and bars lost 5.5 million jobs in April, or 71% of the total decline in leisure and hospitality employment<sup>13</sup>
- CANADA: Employment dropped sharply from February to April in each of Canada's three largest census metropolitan areas. As a proportion of February employment, Montréal recorded the largest decline (-18.0%), followed by Vancouver (-17.4%) and Toronto (-15.2%)<sup>14</sup>
- CANADA: Within the services sector, employment losses continued in April in several industries, led by wholesale and retail trade (-14.0%) and accommodation and food services (-34.3%)<sup>15</sup>
- CANADA: Consumer confidence is showing signs of improving in Canada after weeks of record lows from business shutdowns and strict social distancing measures. Canadians' views on their personal finances, their perceptions of job security and their expectations for the economy all improved. Housing, however, was a weak spot<sup>16</sup>
- CANADA: A new survey from Restaurants Canada has revealed that most foodservice businesses might not have enough cash flow to successfully reopen their doors to diners. About seven out of 10 restaurants surveyed by the organization said they are either very or extremely worried that their business won't have enough liquidity to pay vendors, rent and other expenses over the next three months<sup>17</sup>

**Despite worries of a continued global economic slump, Canadian consumer confidence showed some signs of improvement. With mounting losses, the businesses landscape – especially in tourism – will look very different upon recovery, as many restaurants and hotels will inevitably close permanently.**

## FOCUS CASE STUDY: GREECE – OPENING FOR SUMMER

- Thanks to fast action and restrictions put in place before a major outbreak, Greece has avoided the major outbreaks of nearby Italy – as of May 6, the country has reported 2,663 cases and 147 deaths
- The first phase of Greece's two-month plan began May 4, "with the opening of some shops and services," according to VisitGreece.gr. More businesses are expected to open on May 11 and 18; next steps will be announced on May 18, with the opening of other businesses, including restaurants and hotels, starting June 1<sup>18</sup>
- From June 1st and for the period of a month, stages 4 to 7 will be implemented. These stages will start lifting one by one the lockdown restrictions and reopen the market in the following order: shopping malls, outdoor restaurants, cafes, summer cinemas, year-round hotels, amusement parks, theme parks, outdoor playgrounds, indoor restaurants, indoor cafes, seasonal hotels and resorts, and indoor sports facilities.
- Previous restrictions will still apply during Greece's gradual return to normalcy and lifting each one will be carefully examined and announced to the public. For the time being all transport links with non-EU countries as well as Spain, Italy, Germany and Holland are still suspended till further notice
- Seasonal hotels and resorts, as well as year-round hotels will remain temporarily closed until June. Until all restrictions are lifted one hotel per regional capital will remain open as well as three hotels in Greece's two largest cities, Athens and Thessaloniki
- The 14-day quarantine is still imposed to any new arrival, until Greece's return to normalcy. The ban on all cruise ships and sailboats docking at Greece's ports still applies. Furthermore, departure and docking of private and professional yachts is prohibited at all ports of the country<sup>19</sup>

**KEY TAKEAWAY:** Greece was able to manage the COVID-19 outbreak through fast action early on in the pandemic. Nevertheless, it is taking deliberate and gradual steps to re-open, describing their approach in a clearly articulated plan communicated through its official Visit Greece website. Furthermore, they also clearly articulate that they are taking decisions one day at a time to monitor new COVID-related events. Due to tourism playing a major role in Greece's economy (employing 20% of Greek workers), it is balancing the needs of its tourism industry with safety.



## AVIATION

- GLOBAL: Travel is expected to resume this summer as Europe's major airline groups plan to add flights at different paces. British Airways owner IAG tentatively plans the largest increase, operating 45% of capacity between July and September, the third quarter. Air France-KLM projects to fly only around 20%<sup>20</sup>
- GLOBAL: The major US airlines are losing \$350 million to \$400 million a day as expenses like payroll, rent and aircraft maintenance far exceed the money they are bringing in. Passenger traffic is down about 94%<sup>21</sup>
- GLOBAL: Southwest plans a year-over-year reduction in flying of 65% this quarter and expects load factors to remain in single digits through May. The company has raised \$5.2 billion in liquidity in the private market and has received \$1.6 billion through the federal Cares Act rescue package. The Treasury Department is slated to give Southwest another \$1.6 billion in grants and low-interest loans in the coming three months<sup>22</sup>
- GLOBAL: Delta Air Lines confirmed last Friday that it is eliminating service to 10 US airports it previously had said were part of planned reductions. The carrier said that all airports are smaller facilities within a two- to three-hour drive of a larger, main airport<sup>23</sup>
- GLOBAL: Qatar Airways has been one of few airlines to continue regular, scheduled flights during the global lockdowns, maintaining services to around 30 destinations. It plans to gradually resume flights to 80 destinations by the end of June<sup>24</sup>
- GLOBAL: Avianca, one of Latin America's largest airlines, filed for bankruptcy. Avianca directly employs 21,000 people throughout Latin America, including more than 14,000 in Colombia, where it serves as the country's national carrier<sup>25</sup>
- CANADA: The federal government said it would create a bridge financing facility for large employers including in the airline and energy sectors. "This support will not be used to resolve insolvencies or restructure firms, nor will it provide financing to companies that otherwise have the capacity to manage through the crisis," the statement said<sup>26</sup>
- CANADA: Air Canada is continuing suspension of 'most' domestic and transborder flights until May 31 and international flights until June<sup>27</sup>; WestJet suspended all US, Europe, Mexico, Central America and Caribbean flights through June 30<sup>28</sup>; Air Transat is continuing suspension of all flights until June 30<sup>29</sup>; Sunwing suspended all 'south-bound' flights until June 25<sup>30</sup>; Swoop suspended all transborder and international flights until July 31<sup>31</sup>; Porter Airlines suspended all flights until June 29<sup>32</sup>

**KEY TAKEAWAY:** Access to financing and grants have been essential for many airlines. In response to government announced economic reopening plans, and the potential for lifted travel restrictions, some airlines have begun planning for the gradual resumption of some flights over the summer months.

## ACCOMMODATION & EVENTS

- GLOBAL: Future of work company Global Workplace Analytics estimates that there will be 25-30% of the workforce working from home on a multiple-days-per-week basis by the end of 2021<sup>33</sup>
- GLOBAL: In iMeet's latest Planner Confidence Index, favourable cancellation and attrition terms remains the top factor that would influence a planner to plan future face-to-face events now<sup>34</sup>
- GLOBAL: The Business Events Council Malaysia has appealed to the Malaysian government to make a clear distinction between business events and mass gatherings, with a view to establishing a restart date for the business events sector<sup>35</sup>
- GLOBAL: Tourism Australia is inviting event planners around the globe to enjoy a slice of Australia with a curated programme of live virtual travel experiences on May 15-17. Managing Director, Phillipa Harrison said the intention is to keep event planners inspired and engaged for when it's safe to send groups to Australia again<sup>36</sup>
- GLOBAL: The Department of Culture and Tourism – Abu Dhabi has announced the launch of the 'Abu Dhabi Specialist Program', an e-learning platform that will educate travel trade industry professionals in 17 markets<sup>37</sup>
- GLOBAL: "Due to the historic drop in travel demand and the expected slow pace of recovery, Hyatt has made the extremely difficult decision to implement layoffs and restructure roles across its global corporate functions, beginning June 1, 2020," Hyatt said in a statement<sup>38</sup>
- GLOBAL: US 90-day Airbnb occupancy rates, the percentage of nights that properties listed on Airbnb are booked over the next 90 days, reached 17.48% on the 8th of May, a gain of 7.04% week-on week. That's compared to a gain of 4.09% the week prior<sup>39</sup>
- GLOBAL: In the US, "Week-to-week comparisons showed a third consecutive increase in room demand, which provides further hope that early-April was the performance bottom," said Jan Freitag, STR's senior VP of lodging insights. TSA checkpoint numbers, up for the second week in a row, aligned with this rise in hotel guest activity, which still remains incredibly low in the big picture<sup>40</sup>
- CANADA: Destination Canada has cancelled international travel trade show participation until 2021<sup>41</sup>
- CANADA: The Canadian Tulip Festival organizers have raised about \$45,000 from corporate sponsors, including prominent names such as CIBC, Hilton and KLM. Instead of outdoor events, the festival is showing a series of music videos, photo exhibitions and articles on its website and social media channels that commemorate the 75th anniversary<sup>42</sup>
- CANADA: The industry association representing B.C. hotels says 30-40% of establishments could go under, if the pandemic goes on<sup>43</sup>
- CANADA: In Canada, for the week ending May 4, average RevPAR declined -75.8%. Among the provinces and territories, Newfoundland and Labrador experienced the largest decline in occupancy (-87.8%), British Columbia posted the steepest drop in ADR (-46.7%) and Quebec reported the largest decrease in RevPAR (-91.4%)<sup>44</sup>

**KEY TAKEAWAY:** The business events sector is navigating the dramatically changed environment by offering training online, developing e-learning platforms and seeking to inspire and engage meeting planners in key markets. Hotels across Canada continue to experience major declines, though in the US small increases have been observed in recent weeks.

## CRUISE

- GLOBAL: Cruise Lines International Association (CLIA) created an online global education course for travel agents, including non-CLIA members. The course will help agents “respond confidently to many of the issues and questions that customers may raise” and covers health and safety regulations, security, environmental protection and corporate social responsibility<sup>45</sup>
- GLOBAL: Interest in cruising continues to remain strong despite the COVID-19 outbreak. In a recent survey by CLIA, 75% of travellers in the UK that had already cruised said they would be ‘very likely or likely’ to take a cruise again in the next two years, a marginal drop from 79% since the autumn 2019 survey<sup>46</sup>
- GLOBAL: Princess Cruises is extending its pause on global ship operations through the end of the 2020 summer season, due to reduced air flight availability, the closure of cruise ports in regions around the world and other factors caused by COVID-19<sup>47</sup>
- GLOBAL: AmaWaterways is opening bookings for its 2022 season six months ahead of schedule because an increased demand in sailings, it said on Monday<sup>48</sup>
- CANADA: The cruise lines scheduled to visit Charlottetown Harbour in July and August have cancelled all their visits. The federal government had previously prohibited cruise ships from visiting Canadian ports until at least July<sup>49</sup>

**KEY TAKEAWAY:** Online education continues to be viewed as a priority for cruise employees and travel agents, as travellers express an interest in and demand for future cruise travel. For now, the sector is mainly responding to reduced flight availability and closure of ports by extending cancellations for this year.

## ONLINE TRAVEL AGENCIES (OTAS)

- GLOBAL: Expedia Group Media Solutions, the global digital advertising organisation of Expedia Group, has announced the addition of HomeAway to its global media portfolio of travel brands. The platform claims to receive close to 16 million monthly unique visitors and 257 million monthly page views<sup>50</sup>
- GLOBAL: Booking Holdings said the number of room nights booked in Q1 dropped 43% from a year earlier, while Wall Street had estimated a drop of 29%, according to data compiled by Bloomberg. Gross travel bookings, which reflect all travel services booked by customers, came in at US\$12.4 billion, a 51-per-cent decrease<sup>51</sup>
- GLOBAL: Tripadvisor reported total revenue of US\$278 million for Q1, a decline of 26% year-on-year, while revenue for hotels, media and platform declined by 33% to US\$169 million. Experiences and dining saw a slight increase in total revenue, up 4% to US\$83 million year-on-year<sup>52</sup>

**KEY TAKEAWAY: OTAs have confirmed that ad spending will be severely reduced in response to revenue declines (current and future).**

## MAJOR TOUR OPERATORS

- GLOBAL: ABTA Chief Executive Mark Tanzer has claimed that, "Tour operators have not received money back from suppliers such as airlines and hotels and are unable to meet a 14-day window for refunding a package holiday, and have therefore been asking customers for more time"<sup>53</sup>
- GLOBAL: With the decision to impose a mandatory 14-day quarantine for almost everyone arriving in the UK by air, travel industry insiders say the government has consigned hundreds of holiday firms to failure – including tour operators who will deal with an increased demand for refunds<sup>54</sup>
- GLOBAL: Following the announcement of the May 11 opening of Shanghai Disneyland, Disney announced the phased reopening of its dining and shopping district Disney Springs in Orlando. One analyst said it might be a signal that the domestic parks could open in July or earlier<sup>55</sup>
- GLOBAL: "Our biggest concern right now is the lack of coordination," said Eduardo Santander, executive director and CEO of the European Travel Commission, which has called for strong public-private collaboration and a coordinated, regional response rather than country-by-country approaches<sup>56</sup>
- GLOBAL: Globus said it envisions a return to Europe and, likely, additional worldwide destinations by September. CEO Scott Nisbet said, "To add some certainty to this situation, we are giving control back to our travelers -- and their advisors -- by being proactive and looking ahead through August."<sup>57</sup>
- CANADA: Air Canada Vacations (ACV) has notified the trade that Air Canada's operating schedule for June 2020, while certainly reduced, includes service to Cancun, Varadero, Cayo Coco, Montego Bay, Barbados, Paris, Athens and Barcelona. "We are only going into those destinations where we will have hotels to sell," says Nino Montagnese, ACV Managing Director<sup>58</sup>

**KEY TAKEAWAY: Tour operators continue to manage customer refund requests and advocate for more favourable refund approaches with hotels and airlines. Coordination between countries, and regionally, may lead to quicker recovery and flexible cancellation and rebooking options for customers – especially in the event of recurring COVID-19 outbreaks.**

## TRAVELLER BEHAVIOURS

- GLOBAL: A survey of travellers aged 60-80 showed that 80% of all respondents are keen to travel again, and of that group 36% say COVID-19 has made no difference at all to their holiday priorities<sup>59</sup>
- GLOBAL: An analysis of flight searches done in South Korea, Japan, France, Italy and Spain during March, reveals that consumers in these nations are still researching travel and that they have a disproportionate interest in long-haul travel in the third and fourth quarters of the year<sup>60</sup>
- GLOBAL: Last week China celebrated its National Labour Day – the first nationwide holiday since the lockdown lifts and the relaxation of domestic travel restrictions. According to the Ministry of Culture and Tourism – from May 1-5 – the country recorded over 10 million travellers, resulting in 115 million trips across the country<sup>61</sup>
- GLOBAL: According to Mastercard, there was 40% jump in contactless payments, including tap-to-pay and mobile pay, during the first quarter of this year<sup>62</sup>
- GLOBAL: For a fifth straight week, Arrivalist data shows that drive market trends around the US moved upward; since the low point on April 3. The increase in drive market activity is, as expected, primarily driven by short trips<sup>63</sup>
- GLOBAL: MMGY Global CEO Clayton Reid believes that a subset of travelers called “resilient travelers”, which is about 16% of the US traveler base, will be massive influencers in terms of tipping what other people’s behaviour should – once airline and other travel suppliers resume service<sup>64</sup>
- GLOBAL: The percent of American travellers who feel they will avoid travel until coronavirus is resolved continues to slowly decline (65%), and the perceived safety of flying on a commercial airline, staying in a hotel, dining in restaurants and visiting attractions continues to improve from lows seen in early April<sup>65</sup>
- GLOBAL: Almost 18% of American travellers recall seeing a travel destination ad within the past month and 56% say the most recent travel ad they saw made them feel happy<sup>66</sup>
- CANADA: A majority (56%) of Canadians say their mental health has been negatively affected by COVID-19, including 10% who say the impact has been very negative, according to a new Ipsos poll conducted on behalf of Sun Life Financial. However, social distancing has caused many Canadians to have a renewed appreciation for spending time outdoors (32%)<sup>67</sup>

- CANADA: 'Foodies' across Canada are anxiously waiting for restaurants to open, but 63% have some new conditions, 76% want surfaces to be cleaned regularly, 71% want there to be enough room to distance themselves from others, while 66% want to see maximum capacity reduced. Only 21% want to see mandatory facemasks<sup>68</sup>
- CANADA: According the Conference Board of Canada, their spring travel intentions survey typically reveals that 75-80% of Canadians are planning a summer trip – this year only 45% are<sup>69</sup>
- CANADA: Half (50%) of Canadians have cancelled or changed their vacation plans in 2020<sup>70</sup>

**KEY TAKEAWAY: Beyond timing, travel brands and marketers will need to stay on top of competitor strategies and assess the best way to shift their market positioning and business mix to appeal to new traveller expectations and priorities. Interest and comfort in future travel continues to slowly improve across markets.**

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