

# STATE OF TOURISM IN CANADA DURING COVID-19

DASHBOARD REPORT #6

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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.

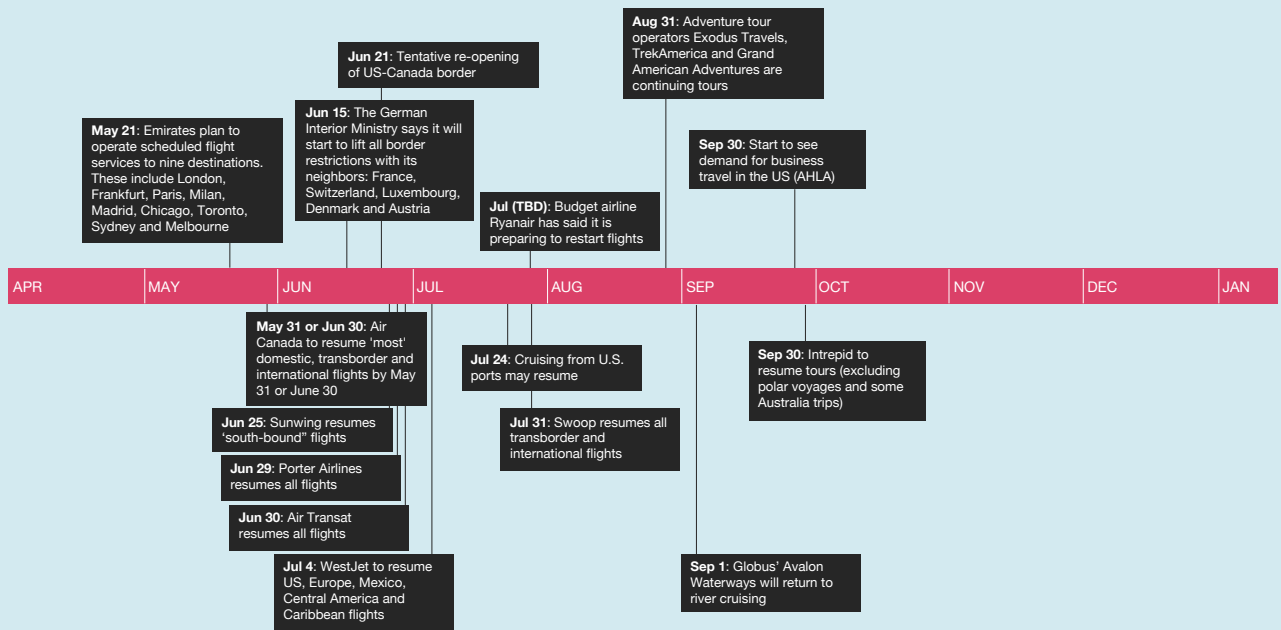
**The dashboard now includes a new 'Global Easing of Travel Restrictions' section that tracks, in a visual format, announcements made by select national and provincial/state policymakers on the easing of travel restrictions in their jurisdictions.**

## KEY INSIGHTS TWENTY31 INTERPRETATION FROM MULTIPLE SOURCES

- GLOBAL: COVID-19 cases and deaths have plateaued triggering a general easing of restrictions. Some destinations are more cautious than others with good reason – countries that were early to emerge from the peak, such as China and South Korea, are seeing a resurgence of cases. This time around, however, they are better prepared. Nevertheless, the spectre of a second wave continues to cause concern, especially among destinations that have managed the pandemic more conservatively
- GLOBAL: As the pre-conditions for tourism begin to emerge, such as the opening of non-essential businesses, operators that also cater to tourists are developing innovative ways of complying with the newly imposed COVID-19 regulations starting with local residents – from cafés overtaking entire city squares to the creation of pop-up dinner-and-a-movie theaters from your car in restaurant parking spaces

- **GLOBAL:** Destinations are beginning to anxiously promote their plans to resume tourism with many dates for opening cross-border crossings, while announced, still set as 'tentative'. This is due to policymakers desiring to monitor the status of the virus with visitors from destinations they may be welcoming
- **GLOBALLY:** As part of the phased approach destinations are implementing, we have now heard of several blocs or bubbles being created and progressing from mere bilateral agreements (e.g., New Zealand and Australia) to multilateral ones (e.g., Germany, France, Switzerland, Luxembourg, Denmark and Austria by June 15)
- **GLOBALLY:** While businesses and other tourism organizations are eager to return to normalized operations, several polls indicate that certain vulnerable traveller demographics, such as the elderly, will wait at least 60 days after travel restrictions have been lifted before travelling again – aka., the COVID-19 lag
- **CANADA:** Many Canadian provinces continue to be cautious in their path to tourism resumption despite low and decreasing number of active cases and deaths. In some instances, though not all, a major concern comes from the need to balance healthcare capacity with economic renewal
- **CANADA:** The psychological toll of COVID-19 on the traveller's psyche is not yet well-understood. Early polls suggest Canadian travellers will experience a lag between when authorities enable travel, to when they will feel comfortable travelling again. A recent survey, for example, indicated that it will take 6 months for Canadians to feel comfortable attending a live event again, such as a concert or festival

## CURRENT TIMELINE



## GLOBAL EASING OF TRAVEL RESTRICTIONS

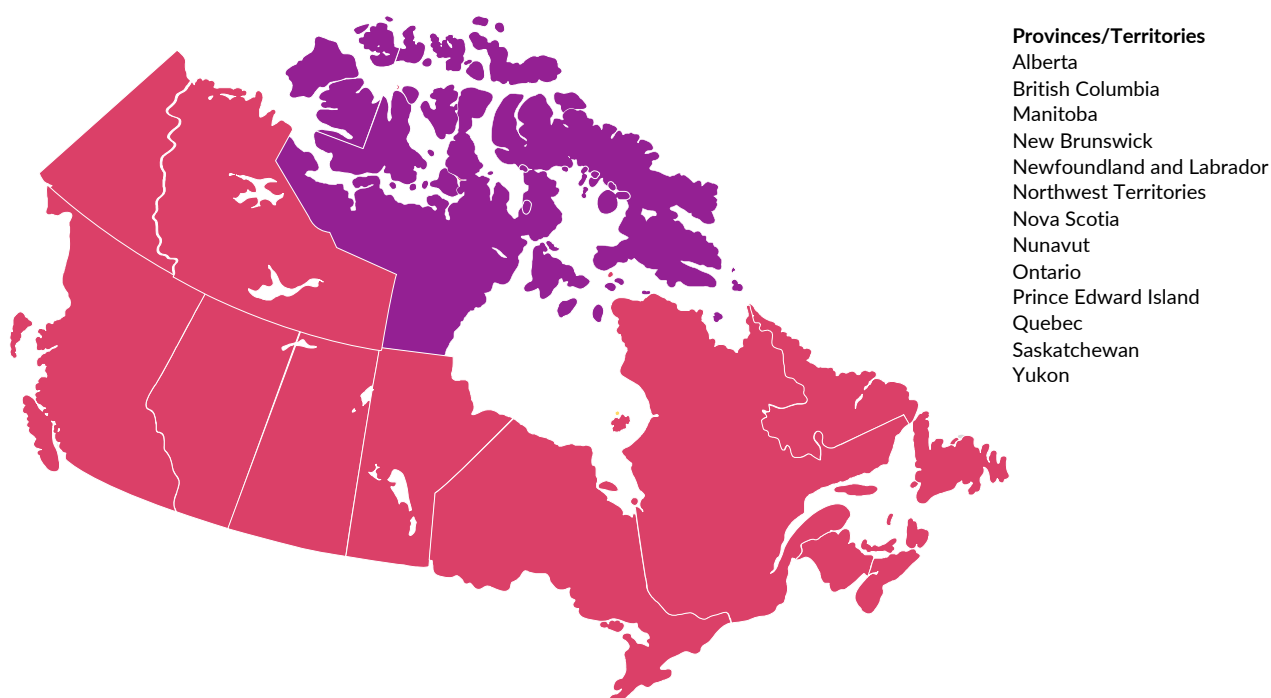
### Notes:

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.

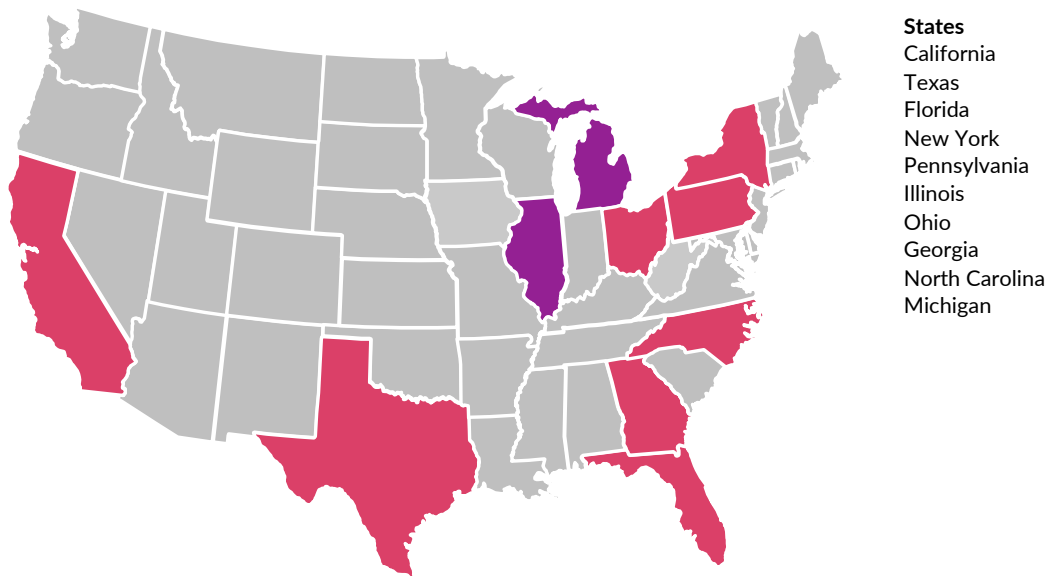
	<b>CURRENT STATE:</b> No tourism; Non-essential business closed; Physical distancing
	<b>PRE-CONDITIONS FOR TOURISM:</b> Limited opening of public spaces; Some emergence of local economy; Intra-provincial/state travel measures in place
	<b>SOME DOMESTIC TOURISM (BUBBLE):</b> Intrnational border opening; 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



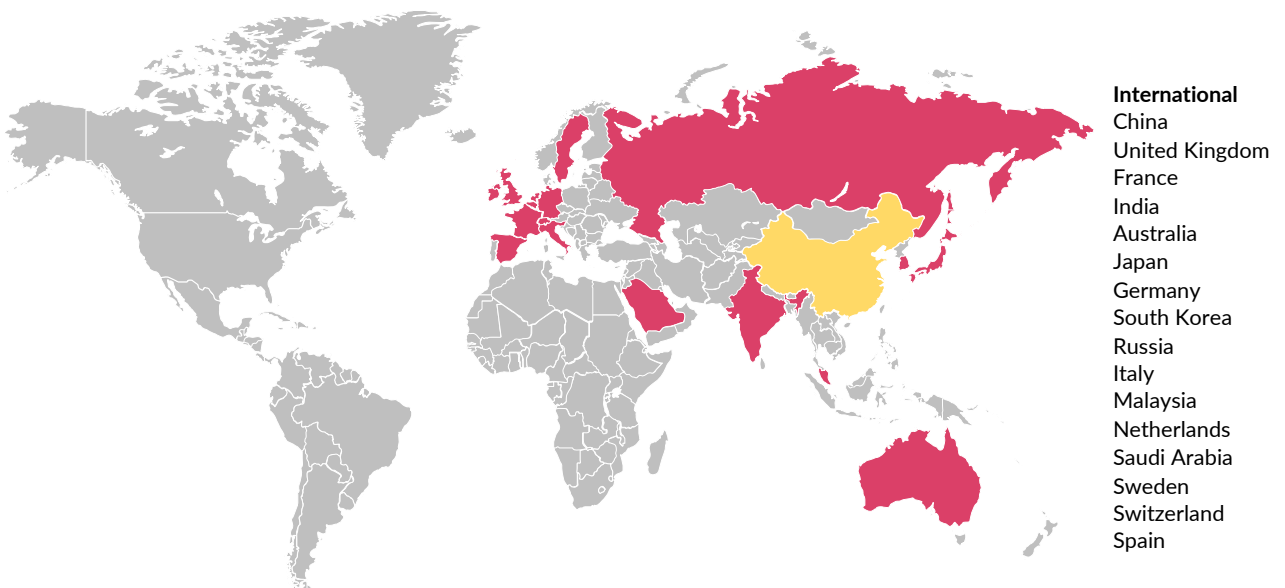
## COVID-19 RESTRICTIONS: TOP 10 MOST POPULATED STATES IN THE US

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



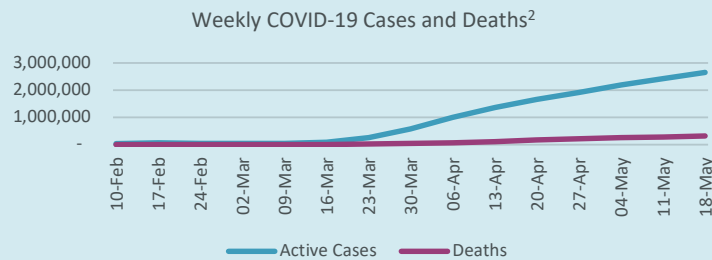
## COVID-19 RESTRICTIONS: CANADA'S TOP SOURCE MARKETS AND TOP GLOBAL OUTBOUND MARKETS (EXCLUDING US)

Note: Data is not readily available for Mexico and Brazil



## OVERVIEW

### HEALTH IMPACT



- GLOBAL: Confirmed deaths caused by COVID-19 surpassed 318,000 globally, while worldwide cases climbed above 4.8 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: UNWTO Secretary General provided an encouraging message, “As the ultimate person-to-person sector, and one that promotes solidarity and friendship, tourism will play a key role in spreading trust more widely, with benefits travelling far beyond tourism itself. Only this way can we drive our economies back towards growth and start rebuilding our societies.”<sup>3</sup>
- GLOBAL: Even as US states begin to reopen, officials have warned that the virus is likely to remain a persistent threat. In Minnesota, cases have more than doubled since the start of May. New cases and deaths remain high in Los Angeles and Chicago<sup>4</sup>
- GLOBAL: The European Commission unveiled its plan to help citizens travel during the summer. The overarching advice is that EU countries with similar rates of coronavirus infections and comparably strong healthcare systems should begin lifting border measures between each other. Tourists from outside Europe cannot enter until at least June 15<sup>5</sup>
- GLOBAL: Italy reopened beaches on Monday with strict rules on social distancing and other preventative measures, such as temperature testing, the use of hand sanitizer and masks<sup>6</sup>
- GLOBAL: India extended its lockdown for another two weeks. Flights, trains, educational institutions, metro services, restaurants, bars, cinemas and shopping complexes will remain closed. However, restaurants can operate takeout, while sports complexes can host events without spectators<sup>7</sup>
- GLOBAL: Australia’s Prime Minister said, “As borders fall internally with eased restrictions – arriving in phases two and three – the domestic tourism market would open to potentially billions of dollars in business.”<sup>8</sup>
- CANADA: The number of COVID-19 cases in Canada has increased over this holiday weekend, but there appear to be some positive signs. The number of new daily cases has averaged less than 1,200 for the past week, a rate not seen since early April<sup>9</sup>

- CANADA: As of May 17, there have been a total of 76,204 confirmed cases and 5,702 reported deaths in Canada<sup>10</sup>
- CANADA: Prime Minister Justin Trudeau announced in a briefing on May 16, that Health Canada approved a vaccine trial at Dalhousie University<sup>11</sup>
- CANADA: By mutual agreement, the Canada-US border will remain closed to nonessential travel until at least June 21<sup>12</sup>

**KEY TAKEAWAY: Optimism is building as more countries and provinces / territories / states begin reopening their economies and resuming life in a 'new normal'. The risk of new outbreaks continues to be top of mind for governments and public health officials as they attempt to get their economies going again.**

## ECONOMIC IMPACT

- GLOBAL: The coronavirus is wreaking havoc on the global economy with an estimated cost of up to US \$8.8T. Japan has fallen into recession for the first time since 2015, shrinking at an annual pace of 3.4% in the first three months of 2020<sup>13</sup>
- GLOBAL: In an interview with Reuters, IMF Managing Director, Kristalina Georgieva said they are likely to revise downward the forecast for a 3% contraction in global GDP in 2020, with only a partial recovery expected next year instead of the 5.8% rebound initially expected<sup>14</sup>
- CANADA: Canada's six biggest banks survived a severe stress test by the Bank of Canada. Governor Stephen Poloz believes that the recession will be 'brutal', but probably relatively short, in part because there appears to be 'little reason to worry about a financial meltdown'<sup>15</sup>
- CANADA: The federal wage subsidy for employees in businesses hit hard by COVID-19 will last at least until the end of August. The subsidy was set to expire in the first week of June, only a few weeks after the first payments rolled out<sup>16</sup>
- CANADA: According to the Tourism Industry Association of Ontario (TIAO) spending in 2020 could drop by half, and more than 35% of operators, including restaurants, hotels, and attractions, may go out of business<sup>17</sup>

**KEY TAKEAWAY: Although poor economic results continue to be reported globally, the IMF believes its global GDP forecasts for the remainder of 2020 and 2021 are more reliable now. This stability, while a downgrade, is providing politicians and businesses with a clearer picture of potential economic growth in the mid- to long-term.**

## FOCUS CASE STUDY: GERMANY – PUSHING MULTILATERAL TRAVEL ARRANGEMENTS

- The German Interior Ministry says it will start to lift all border restrictions with its neighbours: France, Switzerland, Luxembourg, Denmark and Austria, from June 15. The borders will relax in a varying timetable over a month starting from May 15.
- Bilateral agreements will make summer holidays abroad possible, Germany's tourism commissioner Thomas Bareiss said last week. Hotels, restaurants, bars and museums are due to open soon, following on from department stores and many other businesses that re-opened on May 1
- For now, full tourism is still restricted, but bilateral even trilateral travel arrangements between neighbors are set to open up Germany to some European travellers by mid-June or earlier. Until then, a compulsory 14-day self-isolation applies to all travellers arriving from abroad, including Germans and permanent residents. European transit passengers, as well as seasonal and health workers and others who are exempt from EU travel restrictions, dodge quarantine<sup>18</sup>

**KEY TAKEAWAY:** As Germany, a country that has managed the COVID-19 crisis through strict measures and oversight, emerges from the pandemic, it is following a clear set of guidelines to set the preconditions to tourism by this summer. Cautiously, it is beginning to look at bilateral and multilateral agreements, starting with its neighbors to administer a return to a semblance of tourism on June 15 (tentatively). German leadership continues to make it clear that the easing of restrictions depends on how infection rates pan out in Germany, and the health outlook in each country.

## AVIATION

- GLOBAL: John Laughter, Delta's senior vice president of flight operations said in a note to pilots, "Based on current capacity expectations for this fall, we will be overstaffed by more than 7,000 pilots. I recognize that is an alarming number so it's important to know that our intent is to align staffing for what we need over the long term. By the third quarter 2021, we will have between 2,500 and 3,500 pilots more than needed to fly the schedule<sup>19</sup>
- GLOBAL: Lufthansa plans to resume flights to destinations including Los Angeles, Toronto and Mumbai next month as it begins to restore some grounded capacity<sup>20</sup>
- GLOBAL: Emirates has announced its plan to operate scheduled flight services from May 21 to nine destinations. These include London, Frankfurt, Paris, Milan, Madrid, Chicago, Toronto, Sydney and Melbourne<sup>21</sup>



- GLOBAL: Finnair said it would add more flights and routes beginning in July. Commercial Officer Ole Orver said in a statement, "Our intention is to operate approximately 30% of our normal amount of flights in July, and we will also start long-haul flights to our key Asian destinations. We will then add routes and frequencies month-by-month as demand recovers."<sup>22</sup>
- GLOBAL: Budget airline Ryanair has said it is preparing to restart flights in July, pending an easing in lockdowns<sup>23</sup>
- GLOBAL: Norwegian Air appears primed to receive a lifeline from the Norwegian government after completing a share sale and winning backing from bondholders for a refinancing<sup>24</sup>
- GLOBAL: To keep consumer relationships alive and conversations flowing, airlines have taken creative new approaches to loyalty and reward programs. For example, Air Canada now allows consumers to earn elite flyer status by spending on co-branded credit cards, buying on the airline's shopping portal and donating miles to charity. Similarly, American Airlines lets passengers earn status for life if they spend enough on a co-branded credit card<sup>25</sup>
- GLOBAL: According to Henry Harteveldt, airline analyst at Atmosphere Research Group, "fear and trust will be the two emotions at the forefront of people's minds when planning a trip, and if a person doesn't feel an airline adequately respects their health, they will find an airline that does."<sup>26</sup>
- CANADA: The National Airlines Council of Canada, which represents Air Canada, WestJet, Jazz and Transat, has stated that it supports the Canadian Transportation Agency's guidance that travel vouchers are acceptable given the financial and operational crisis the pandemic caused<sup>27</sup>
- CANADA: Air Canada has reduced its workforce by up to 60% to save cash amid the COVID-19 pandemic. The job cuts will be effective June 7 and could affect between 20,000 and 22,800 employees<sup>28</sup>
- CANADA: Air Canada is continuing suspension of 'most' domestic, transborder and international flights until May 31 or June 30<sup>29</sup>; WestJet suspended all US, Europe, Mexico, Central America and Caribbean flights through July 4<sup>30</sup>; Air Transat is continuing suspension of all flights until June 30<sup>31</sup>; Sunwing suspended all 'south-bound' flights until June 25<sup>32</sup>; Swoop suspended all transborder and international flights until July 31<sup>33</sup>; Porter Airlines suspended all flights until June 29<sup>34</sup>

**KEY TAKEAWAY:** The airline sector has announced further cuts, job losses and extended service suspensions. Despite the continued pause, some airlines are selecting and announcing destinations to gradually increase their capacity. To stay relevant with customers, creative new approaches to loyalty and reward programs are being implemented.

## ACCOMMODATION & EVENTS

- GLOBAL: Seventy-eight percent of corporate travellers globally believe coronavirus-related travel restrictions have had a negative impact on business growth<sup>35</sup>
- GLOBAL: VisitBritain has announced that its flagship annual meetings, incentives, conferences and exhibitions event, MeetGB, will this year be run as a virtual educational event<sup>36</sup>
- GLOBAL: German states have been given the authority to allow trade shows and exhibitions to reopen, ahead of other mass gatherings, under a number of strict requirements including limiting the number of participants and approved health and safety measures<sup>37</sup>
- GLOBAL: The New Zealand Government has confirmed ticketed large events, including domestic business events and conferences can now go ahead with a 100-person limit. The events must adhere to a one-metre distancing requirement and use contact tracing<sup>38</sup>
- GLOBAL: According to a survey of pharmaceutical and biomedical company representatives, corporate clients have shown an increased interest in new virtual platforms, but companies are still convinced that in-presence, face-to-face events offer a greater value<sup>39</sup>
- GLOBAL: Chip Rogers, the president and CEO of the American Hotel and Lodging Association, says occupancy rates across the country have plummeted between 25-30%. Typically, occupancy rates hover around 62-67%<sup>40</sup>
- GLOBAL: The latest US hotel forecast from STR and Tourism Economics projects a 57.5% decline in RevPAR in 2020, then a 48.0% increase in the metric in 2021. "Performance levels are dismal from every angle, but at the very least, weekly data through May 9 indicates that the industry has already hit bottom and begun a steady ascent," said Amanda Hite, STR president<sup>41</sup>
- CANADA: The City of Toronto announced it is cancelling the permits for major events and festivals in July and August based on public health advice<sup>42</sup>
- CANADA: Bookings from essential services such as railway and road construction, mining projects, pipelines and plant maintenance have helped some of Canalta Hotels' properties weather the COVID-19 crisis<sup>43</sup>
- CANADA: Days Inn Canada started using 3M Clean-Trace Luminometers, which illuminate surfaces and highlight areas that need sanitizing<sup>44</sup>
- CANADA: In Canada, for the week ending May 11, average RevPAR declined 83.7%. Among the provinces and territories, Newfoundland and Labrador experienced the largest decline in occupancy (-86.0%), British Columbia posted the steepest drop in ADR (-44.4%) and Quebec reported the largest decrease in RevPAR (-88.4%). Toronto recorded the largest decrease in RevPAR (-91.1%)<sup>45</sup>

**KEY TAKEAWAY: The business events sector is starting to re-emerge in destinations that are ahead of the curve with COVID-19 case management and prevention. A major win, in some cases, has been the classification of business events and trade shows as distinct from mass gatherings for social purposes.**

## CRUISE

- GLOBAL: Carnival Corporation CEO Arnold Donald said that it is “encouraging to note that the majority of guests affected by our schedule changes want to sail with us at a later date, with fewer than 38% requesting refunds to date. We plan to stagger fleet re-entry to optimise demand and operating performance<sup>46</sup>
- GLOBAL: Globus’ Avalon Waterways on Wednesday is looking at September 1 for a return to river cruising. The company unveiled its safety plan, called the Avalon Assurance program, featuring seven major categories and protocols that span across guest experience touch-points<sup>47</sup>
- GLOBAL: Royal Caribbean gave hints about some practical onboard changes it is considering. CEO Michael Bayley said that the cruise line will not have buffets when it initially returns to sailing<sup>48</sup>
- GLOBAL: Norwegian Cruise Line Holdings said the company’s level of bookings for 2021 were within “historical ranges,” meaning the years between 2017 and 2020, while acknowledging that the volume was not as robust as under normal circumstances<sup>49</sup>
- GLOBAL: Cruise Lines International Association unveiled ‘Cruise Champion’, a new course that takes travel agent members deeper into the workings of the global cruise sector and offers them the knowledge to become ambassadors for the industry<sup>50</sup>

**KEY TAKEAWAY: Although cruising was front and centre for weeks in COVID-19 coverage, which caused reputation damage, the sector has pivoted and is proving that consumer demand is still healthy. The sector continues to band together by offering training to travel agents in an effort to boost the profile of cruising and improve knowledge of the industry.**

## ONLINE TRAVEL AGENCIES (OTAS)

- GLOBAL: Asian online travel giant Agoda is laying off 1,500 workers in 30 countries. Senior leadership team members will also take a temporary salary reduction effective June 1<sup>51</sup>
- GLOBAL: InterContinental Hotels Group (IHG) has launched its inaugural flagship store on Chinese OTA platform Ctrip. IHG Greater China CEO Jolyon Bulley said that the partnership “came as early signs of lodging demand return in China. We are looking forward to better leveraging the integrated resources of both sides, providing more IHG Rewards Club members with a richer range of benefits.”<sup>52</sup>
- GLOBAL: After posting a US\$57 million profit in Q1 of 2019, Sabre swung to a US\$212.7 million loss in the first three months of this year. Reductions were due to declines in air, hotel and other travel bookings driven, along with a \$46 million charge in connection with the termination of its takeover deal with Farelogix<sup>53</sup>
- CANADA: Airline ticket broker Hopper secured another US\$70 million in funding<sup>54</sup>
- CANADA: FlightHub is seeking protection from its creditors. Travel restrictions have caused revenues to plummet by more than 90% in just two months, and the company lost \$8 million in the first quarter of 2020<sup>55</sup>

**KEY TAKEAWAY:** The earnings reports of OTAs suggest that recovery is not expected to rebound for some time. Partnerships between OTAs and suppliers may prove to be a savvy way to integrate resources and create relevancy.

## MAJOR TOUR OPERATORS

- GLOBAL: Adventure tour operators Exodus Travels, TrekAmerica and Grand American Adventures are extending the suspension of all tours until August 31<sup>56</sup>
- GLOBAL: The Travel Corporation has announced a series of enhanced COVID-19 related protocols and hygiene standards. The new standards will cover offerings from brands including Trafalgar, Luxury Gold, Insight Vacations, Contiki and Costsaver once domestic and international travel resumes<sup>57</sup>
- GLOBAL: TUI Switzerland, Hotelplan, and Kuoni announced extended trip cancellation deadlines to June 14 due to non-essential travel restrictions in many countries<sup>58</sup>
- GLOBAL: The director of the Croatian National Tourist Board, Kristjan Stanicic, said that “The National Tourist Board and its German representative office are constantly and proactively communicating with the German market and partners about the possibility of cooperation and arrivals of German tourists in Croatia this summer.” Croatia is being mentioned in various German media outlets as a possible destination for this summer, primarily due to limited travel restrictions and close proximity for driving<sup>59</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: It will take the majority of Americans at least 60 days after “experts sound the all clear” on COVID-19 before they feel comfortable resuming travel, a survey released last week concluded<sup>60</sup>
- GLOBAL: At least six in 10 Americans support measures relating to hygiene including thorough cleaning after each flight rather than just overnight (82%), adding sanitizing guidelines to pre-flight demonstrations (76%), and requiring all passengers’ bags to go through one or more disinfection processes (61%)<sup>61</sup>
- GLOBAL: In a survey of UK travellers, two-thirds of respondents would prefer to stay in a vacation rental or holiday home as opposed to a traditional hotel<sup>62</sup>
- GLOBAL: While the extent of this reopening will depend on airline availability and frequency, it is looking like some travellers are already looking at the potential of a Greek holiday. In particular, travel intent seems to be highest from within Europe as well as the Middle East<sup>63</sup>
- GLOBAL: According to Sojern data, Mainland China outbound travel started declining in December and has since reached a plateau. Trends show that domestic travel took a sharp drop in mid-January when China imposed a lockdown, but has continued to improve since mid-March, showing positive upticks<sup>64</sup>
- GLOBAL: Meredith Travel Marketing’s Social Listening Report (May 7-14) analyzed the discussion and trends in social media conversations. The conversation around COVID-19 is down by 8% in the last week versus the previous week (April 30-May 7) – and down 75% from the mid-March peak<sup>65</sup>
- GLOBAL: Travellers in the Northeastern US are much more likely to say they are going to take a staycation this summer (62.6% compared to average of 54.1%) and avoid international travel (80.0%)<sup>66</sup>
- GLOBAL: Approximately one-third of US travellers remain committed to postponing, rather than cancelling scheduled travel for the months ahead. Activities with the longest booking windows, such as vacation rental homes and cruises are still the most likely to remain unchanged<sup>67</sup>
- GLOBAL: For those American travellers under shelter-in-place orders, 59.1% feel that travelling together when COVID-19 is over would be good for their family<sup>68</sup>
- CANADA: At the end of April, Abacus Data conducted a national public opinion survey commissioned by Music Canada. Among Canadian live music lovers, 49% say it will take six months or more (or they may never) to feel comfortable going to a concert in a large venue; 48% feel the same way about going to a music festival; 68% say it will take six months or more or they may never feel comfortable again going to a concert in the US<sup>69</sup>
- CANADA: 57% of Canadians are stressed about leaving their house and being in public. Americans (64%) are more stressed about this than Canadians<sup>70</sup>

**KEY TAKEAWAY: Canadians and Americans are still experiencing a high degree of stress and worry about venturing outside of their own homes for regular tasks and errands. Vacation rental homes and staycations are viewed as more attractive for potential travel this year.**

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