

# STATE OF TOURISM IN CANADA DURING COVID-19

DASHBOARD REPORT #7

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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.

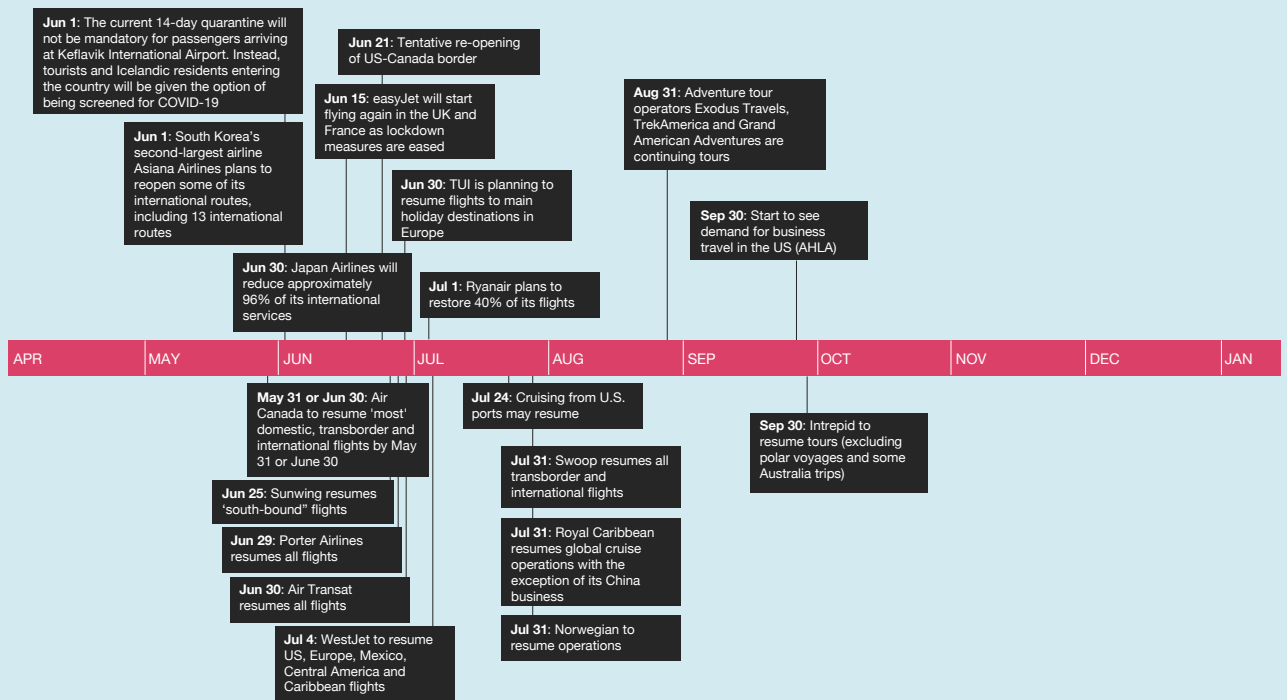
**The dashboard now includes a new 'Global Easing of Travel Restrictions' section that tracks, in a visual format, announcements made by select national and provincial/state policymakers on the easing of travel restrictions in their jurisdictions.**

## KEY INSIGHTS TWENTY31 INTERPRETATION FROM MULTIPLE SOURCES

- GLOBAL: Globally and across tourism sectors, destinations and operators are gradually returning to tourism. In the US alone, the tourism industry generated over USD\$3 billion last week, the highest level since early April. Accommodation providers are beginning to see an uptick in bookings, some conference centers and events facilities are also opening doors, not to mention the slow resumption of flights and border openings across the world. With that said, there are still some major destinations like Brazil and Russia that are in the midst of peak COVID-19.
- GLOBAL: When reviewed at a high level, there seems to be a critical mass of tourism business resumption, whether airlines, accommodation providers, tour operators in the end of June timeframe.

- **GLOBAL:** The cruise industry, specifically, is generally expecting to see a return to business at the end of the summer season. And, for 2021, some cruise operators are in a better position than they have been in the last six years.
- **GLOBAL AND CANADA:** Some destinations like New Zealand and Prince Edward Island are mounting local campaigns to promote their destinations to the primary travel and tourism consumer group: domestic tourism.
- **CANADA:** In Canada, indicators of tourism return, such as hotel occupancy, continue to demonstrate declining trends as provincial governments enforce and, in some cases, extend lockdown measures.
- **CANADA:** Another aspect of a return to tourism that has crept up in early discussions across Canada suggests that domestic residents of a destination are less inclined to welcome visitors from elsewhere, especially from areas that have been more acutely impacted.

## CURRENT TIMELINE









## GLOBAL EASING OF TRAVEL RESTRICTIONS (HEAT MAPS)

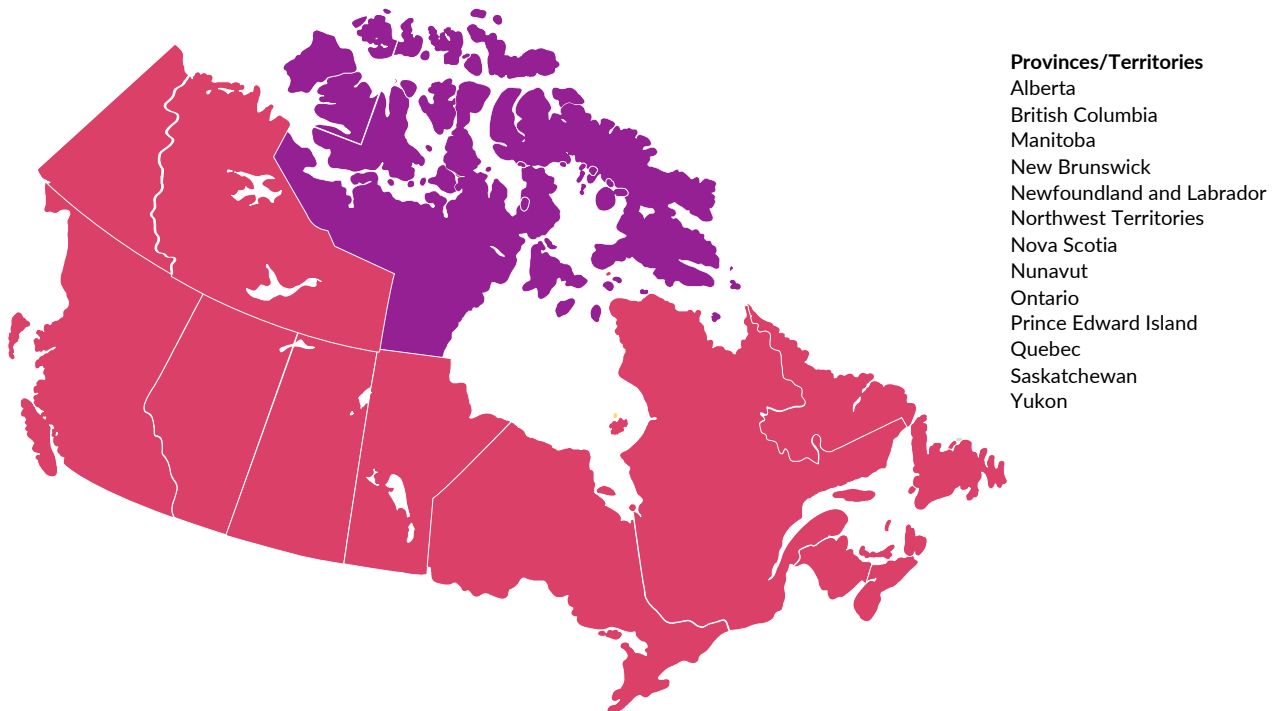
### Notes:

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

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.

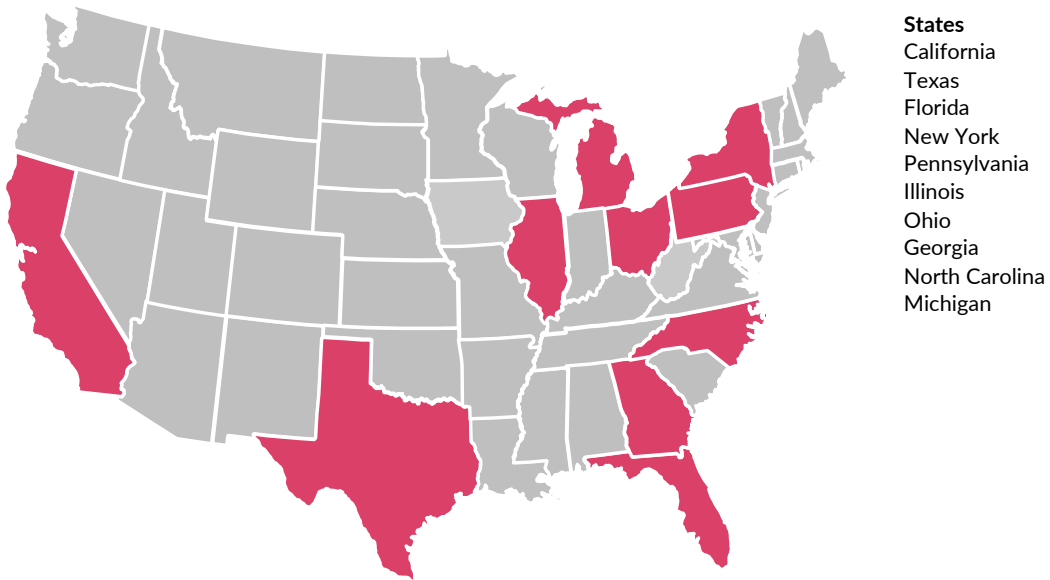
	<b>CURRENT STATE:</b> No tourism; Non-essential business closed; Physical distancing
	<b>PRE-CONDITIONS FOR TOURISM:</b> Limited opening of public spaces; Some emergence of local economy; Intra-provincial/state travel measures in place
	<b>SOME DOMESTIC TOURISM (BUBBLE):</b> Intraterritorial border opening;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

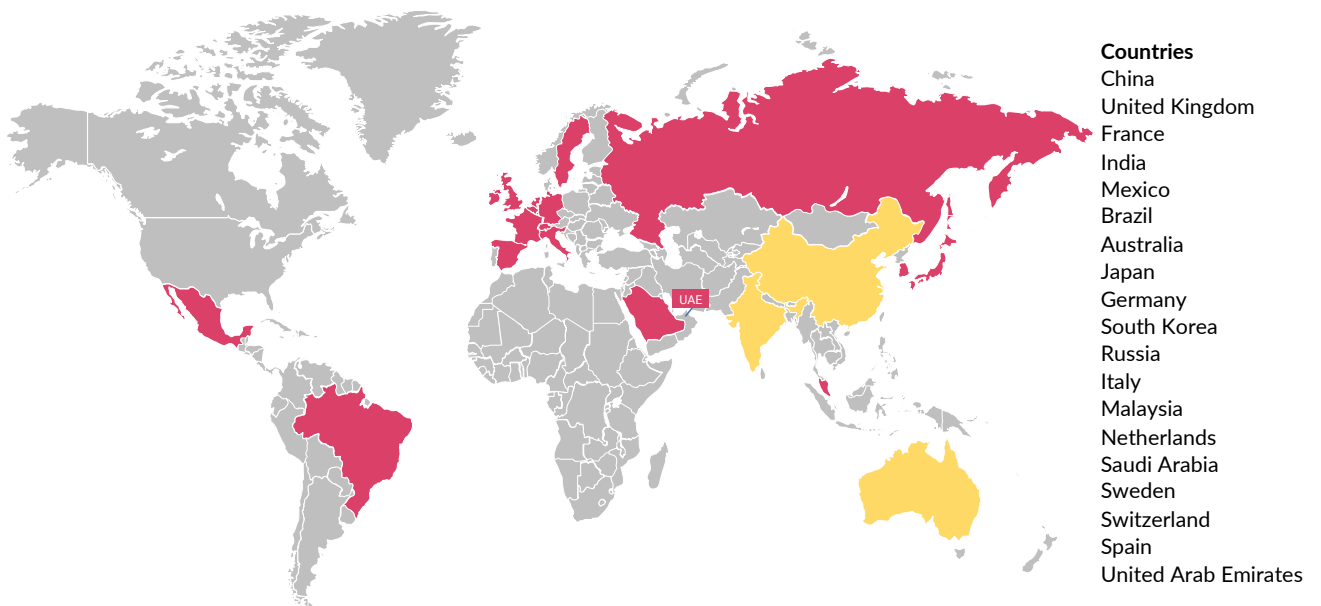


## COVID-19 RESTRICTIONS: TOP 10 MOST POPULATED STATES IN THE US

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

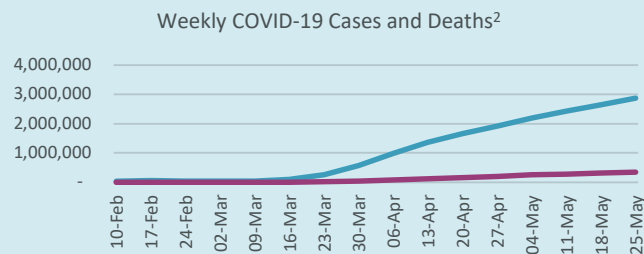


## COVID-19 RESTRICTIONS: CANADA'S TOP SOURCE MARKETS AND TOP GLOBAL OUTBOUND MARKETS (EXCLUDING US)



## OVERVIEW

### HEALTH IMPACT



- GLOBAL: Confirmed deaths caused by COVID-19 surpassed 347,000 globally, while worldwide cases climbed above 5.5 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
- GLOBAL: According to an EU-backed study, fifty days of strict lockdowns followed by 30 days where measures are eased could be an effective strategy for reducing COVID-19 deaths while ensuring some level of economic protection
- GLOBAL: All 50 U.S. states have started to reopen their economies in some capacity. But the number of businesses that are back open varies widely from state to state and even county to county
- GLOBAL: Greece's long-awaited tourist season will begin on June 15 with the opening of seasonal hotels and the arrival of the first foreign visitors. Tourism Minister Harry Theoharis said a list of countries from which visitors will be able to arrive in Greece will be announced before the end of May. The selection will be based on "epidemiological criteria"
- GLOBAL: The three Baltic states - Lithuania, Latvia and Estonia - have become the first countries in Europe to allow free movement again, but only with each other
- GLOBAL: Spanish Prime Minister, Pedro Sánchez, announced over the weekend that Spain will reopen to overseas tourists, beginning July 1
- GLOBAL: Tourism New Zealand is leading work to "reimagine" domestic tourism. However, it says it is not stopping marketing in key markets overseas
- GLOBAL: The World Health Organization said that countries in Europe and North America should "continue to put in place the public health and social measures, the surveillance measures, the testing measures and a comprehensive strategy to ensure that we continue on a downwards trajectory and we don't have an immediate second peak."
- CANADA: A recent uptick in positive cases and large group gatherings means Ontario will maintain some COVID-19 restrictions longer than initially planned. The province had been considering allowing groups of more

than five people to gather in the near future, but those plans have temporarily been put aside

- CANADA: As of May 25, there have been 84,699 confirmed cases and 6,424 reported deaths in Canada
- CANADA: Prime Minister Justin Trudeau said the federal government is talking to the provinces about bringing in 10 days of paid sick leave for workers

**KEY TAKEAWAY: Discussions on travel ‘bubbles’ have been taking place in Asia and Europe; however, some countries are moving ahead to reopen tourism using other approaches. Public health officials continue to warn that testing and comprehensive strategies are needed to prevent a second peak.**

## ECONOMIC IMPACT

- GLOBAL: Chinese workers returned to work in April but many no longer had jobs. Widespread cancellations of international orders and delayed payments have led to liquidity problems and mass closures of businesses reliant on global demand
- GLOBAL: In the US, national weekly travel spending rose slightly to US\$3 billion last week (its highest level since the week ending April 4) as the benefits of easing lockdown measures take hold
- GLOBAL: Deutsche Bank Wealth Management warned that a “hoped-for” rebound in the second half of 2020 won’t be strong enough to undo the damage absorbed in the first, at least among the advanced economies of the United States, Europe and Japan
- CANADA: The Canadian Federation of Independent Business surveyed its members in Ontario over the May long weekend and found that 51% of respondents would not be able to pay their June rent without more help
- CANADA: Storefront closures had a substantial impact on retailers in March, as sales plunged 10% to \$47.1 billion, the largest monthly decline on record. In contrast, sales at food and beverage stores rose by 22.8% in March. The online sales of Canadian retailers also strengthened, as many businesses opened or expanded their online platforms. Before adjusting for seasonality, retail e-commerce in March was up 40% on a year-over-year basis
- CANADA: The government of Newfoundland and Labrador is launching a \$25-million program to support the province’s tourism sector. Small and medium-sized tourism operators can apply for one-time funding contributions of \$5,000 or \$10,000, depending on their gross sales

**KEY TAKEAWAY: The impact of COVID-19 on sales and revenues in Q1 shows that the economy will not bounce back as quickly as many hope. Support programs are still being announced globally to help sustain businesses and prevent travel distribution collapse.**

## FOCUS CASE STUDY: NEW ZEALAND – “DO SOMETHING ‘NEW’ NEW ZEALAND”

- On May 22, Tourism New Zealand took a big step in its new job of promoting its country to Kiwis with the release of a video featuring some well-known faces.
- Instead of selling this country overseas to tourists who can't come here, for now, the Government agency is pulling on the heartstrings with sports celebrities, broadcasters and ordinary Kiwis reeling off their bucket-list destinations in a video intended for domestic audiences.
- Tourism New Zealand - which has a budget of about \$112 million a year - is leading work to “reimagine” domestic tourism. It says it is not stopping marketing of this country in key markets overseas though, as it would be too difficult to re-ignite interest in New Zealand if promotion stopped altogether.
- A survey released by Tourism NZ earlier this month showed that the sector had made significant changes to its operations to try and keep its business alive since the Covid-19 outbreak. Three-quarters of the 1619 businesses which responded to the survey said they had changed their operations to adapt and 88 per cent of businesses think they can pivot their product to the domestic market.

**KEY TAKEAWAY:** Several weeks ago, this dashboard examined New Zealand as one of the first destinations to establish tourism “bubbles” together with Australia. In this week’s dashboard, all eyes are again on New Zealand tourism practices, as one of the first destinations to contain COVID-19 and resume tourism, to understand possible paths for the resumption of tourism. Two key takeaways include the in-depth research that New Zealand conducted to assess local business sentiment and ability to cater to the domestic traveller. Secondly, it includes the focus on getting New Zealanders to visit the island while ensuring to stay in the minds of people in major source markets by investing there as well, albeit at lower rates than in previous years.



## AVIATION

- GLOBAL: Japan Airlines will reduce approximately 96% of its international services until June 30
- GLOBAL: Domestic flights resumed across India on Monday, with flexibility for state-based rules
- GLOBAL: South Korea's second-largest airline Asiana Airlines plans to reopen some of its international routes from June 1, including 13 international routes
- GLOBAL: Ryanair plans to restore 40% of its flights from July 1; Easyjet will start flying again from June 15 in the UK and France as lockdown measures are eased; Travel giant TUI is planning to resume flights to main holiday destinations in Europe by the end of June
- GLOBAL: Philippines carrier Cebu Pacific said it will likely start "contactless flights" next month, where passengers will have no physical contact with crew and airline staff. Passengers will have to stow their own bags in overhead cabins, dispose of their own trash and cannot change seats during the flight
- GLOBAL: Delta Air Lines said it plans to add 100 flights in June so planes are no more than 60% full
- GLOBAL: Lufthansa will receive up to US\$9.8 billion in loans for stabilization
- CANADA: Air Canada's goodwill policy, starting June 1, will offer customers the choice of a travel voucher with no expiry date that is fully transferable or to convert their booking into Aeroplan Miles and get an additional 65% bonus miles
- CANADA: Air Canada is continuing suspension of 'most' domestic, transborder and international flights until May 31 or June 30 ; WestJet suspended all US, Europe, Mexico, Central America and Caribbean flights through July 4 ; Air Transat is continuing suspension of all flights until June 30 ; Sunwing suspended all 'south-bound' flights until June 25 ; Swoop suspended all transborder and international flights until July 31 ; Porter Airlines suspended all flights until June 29
- The job cuts will be effective June 7 and could affect between 20,000 and 22,800 employees<sup>28</sup>
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**KEY TAKEAWAY: Although airline confidence is building gradually, quarantines and border openings will need to be continually navigated before flight capacity and network connections increase. Based on the last week's announcements June appears to be the key rebuild/restart month.**

## ACCOMMODATION & EVENTS

- GLOBAL: NYC & Company, the city's official DMO, has launched a Virtual NYC Site Tours page for meeting planners. It keeps track of 75 event venues and hotels
- GLOBAL: The Harpa Concert Hall and Conference Center in Reykjavik, Iceland has reopened, becoming one of the first conference centres in Europe to do so. Starting June 15, the current 14-day quarantine will not be mandatory for passengers arriving at Keflavik International Airport. Instead, tourists and Icelandic residents entering the country will be given the option of being screened for COVID-19
- GLOBAL: From June 1, hospitality venues in New South Wales, Australia will be allowed to open their doors to up to 50 guests
- GLOBAL: Four Seasons Hotels and Resorts is collaborating with Johns Hopkins Medicine International to validate its new global health-and-safety program, 'Lead with Care,' and provide ongoing, real-time guidance
- GLOBAL: "The trend of 'less bad' data continued with occupancy and ADR on a slow climb driven by a fifth consecutive week-to-week increase in demand," said Jan Freitag, STR's senior VP of lodging insights. "Last week's data showed demand of more than 10 million room nights sold for the first time since the end of March, and this past week, the industry inched close to 11 million."
- CANADA: The American Hotel & Lodging Association (AHLA) announced that hospitality leaders across North America have endorsed "Safe Stay", AHLA's enhanced industry-wide cleaning guidelines
- tCANADA: In Canada, for the week ending May 18, average RevPAR declined 83.2%. Among the provinces and territories, Newfoundland and Labrador experienced the largest decline in occupancy (-83.6%) and Quebec posted the steepest drop in ADR (-46.3%). Montreal had the steepest decline in ADR (-51.9%)

**KEY TAKEAWAY: Hotel activity across Canada continues to decline as restrictions on travel and large group gatherings mostly stay intact. Internationally, some countries have started opening conference centres and hospitality venues in an effort to safely bring back business events.**

## CRUISE

- GLOBAL: “We are in a better position for 2021 right now, than we have been for the last six years. People are booking in advance and they do want to sail next year,” Ellen Bettridge, president and CEO of Uniworld, told Travel Market Report
- GLOBAL: Norwegian Cruise Line announced that it would extend its suspension in operations another month, through July 2020. All guests booked on sailings in July will automatically receive a future cruise credit worth 125% of the fare paid
- GLOBAL: Norwegian Cruise Line will keep its Peace of Mind policy in place through at least November 30. The policy allows guests to cancel up to 48-hours before departure and receive either a full refund or a future cruise credit to be used on any new sailing through December 31
- GLOBAL: Royal Caribbean executives confirmed that the company will extend its temporary suspension of global cruise operations through July 31, with the exception of its China business
- GLOBAL: American Cruise Lines teamed with Vikand Solutions to forge a comprehensive healthcare plan to begin safely sailing in June. The initial three itineraries involve Tennessee, Mississippi and Louisiana; Oregon and Washington; and Alaska
- GLOBAL: Small-ship cruise operator Windstar Cruises revealed plans to resume operations in September with the Wind Spirit in Tahiti, and gradually return other ships to service through July 2021

**KEY TAKEAWAY: The cruise industry appears to be readying for a gradual July and August rebuild/restart. Indicators show that cruise demand has largely remained steady, due to trip rebooking and continuing reputation management activities.**

## ONLINE TRAVEL AGENCIES (OTAS)

- GLOBAL: The French government is planning to create a state-run travel booking website in an attempt to rival popular US platforms such as Airbnb and Booking.com. Emmanuel Macron’s government hopes to attract more foreign visitors without American tech companies acting as online agents
- GLOBAL: Klook, a world-leading travel activities and services booking platform, announced the launch of a new home-based experiences initiative, Klook Home. The initiative will be starting with local experiences (home-based experiences; weekend things-to-do within the city; and domestic travel experiences), followed by offerings based on intra-regional travel corridors

**KEY TAKEAWAY: The OTA market is expected to evolve as government and the tourism industry, such as in France, see an opportunity to shift the competitive landscape and regain control of bookings and revenue.**

## MAJOR TOUR OPERATORS

- GLOBAL: A survey of guided travel tour companies shows that 17% foresee a return to domestic travel business in June, and 26% think it will come in July; 9% said August, and 30% anticipate a September restart
- GLOBAL: Collette has announced a new health and wellness initiative, coined the 'Travelling well experience'
- GLOBAL: Adventure operators Intrepid and G Adventures have said they are also seeing high demand for Latin America, particularly Peru and the Galapagos
- GLOBAL: Shearings has collapsed into administration, with 2,460 immediate job losses and thousands of holiday cancellations
- GLOBAL: UK coach tourism operators have said 40,000 jobs will be put at risk because of the coronavirus lockdown unless their business is reclassified as part of the leisure industry

**KEY TAKEAWAY: As the major tour operators take a destination-by-destination approach to resume activities, small operators are in an ideal position to quickly respond to changing local conditions and serve pent up travel demand. Continued collaboration with DMOs will be critical to ensure available itineraries and experiences are promoted.**

## TRAVELLER BEHAVIOURS

- GLOBAL: Destinations inspiring travel dreams for people across the world include Bali, Andalusia, London, Florida and Paris, suggesting that cultural hotspots and beach escapism are at the forefront of travel imaginations, alongside the stimulation of the big city
- GLOBAL: In a recent poll, more than 40% of UK travellers revealed that they would be willing to travel abroad despite the need to self-isolate when they return
- GLOBAL: Taking public transportation, traveling onboard the airplane, visiting indoor attractions in their trip destination, and traveling in taxis/Ubers/Lyfts are most agreed upon as the least safe aspects of a potential trip
- GLOBAL: Nearly 40% of Millennial travelers report they will make travel at least a somewhat high priority in their lifestyle – double the number of Baby Boomers who said the same – and plan to spend \$3,000 on leisure travel in the next three months
- GLOBAL: Research from Arrivalist shows that trips between 160-400 km are up 55% from just four weekends ago, while trips over 400+ km are up 74%

- GLOBAL: Three-quarters of Americans who plan to travel this year will research how the destination they visit and its businesses are managing the coronavirus situation – demonstrating the need for destination-level information on safety
- GLOBAL: Most “eager travelers” (+60%), those who travel the most in general, with an average of 3-4 leisure trips and 2-3 business trips in the past year, agree that hotels and airlines have implemented enough new cleaning procedures to protect them against the virus and have already done enough to reassure them that they will be safe
- CANADA: Four-in-ten Canadians (42%) would be comfortable going on a road trip within two months of the protective measures being lifted, with this number growing to 66% within six months
- CANADA: 90% of Canadian think organized sport or group physical activities will be important for recovery post-pandemic, 38% think they will be very important
- CANADA: Nearly one-in-five Canadians (18%) say they have adopted at least one new online behaviour for the first time since the crisis. Among these new consumers, more than seven in ten (71%) intend to continue at least one of these behaviours in the future

**KEY TAKEAWAY:** The current data points are showing that despite fears about COVID-19, travellers are optimistic about future trips. However, transportation modes will likely be modified, and most travellers will research destination-level information on how COVID-19 is being handled.

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