

STATE OF TOURISM IN CANADA DURING COVID-19

DASHBOARD REPORT #4

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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.

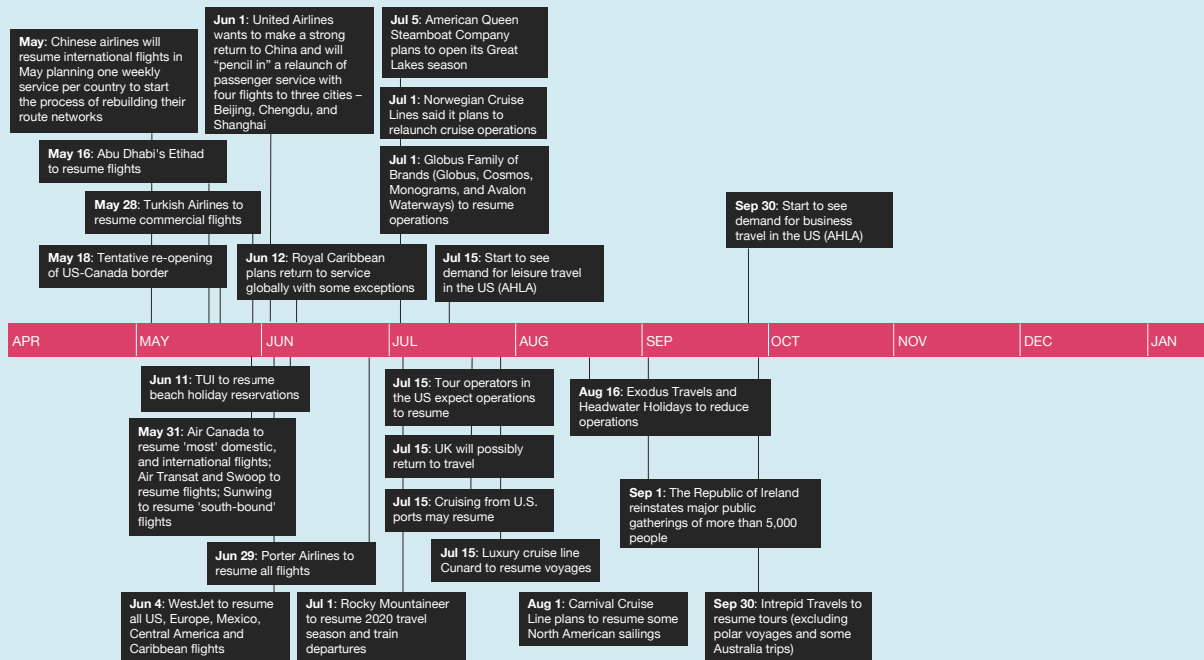
A new 'Case Study' section is included to inform approaches that destinations across the globe are using to open their tourism economies and formulate re-emergence strategies as signs of pre-conditions for tourism began to emerge.

KEY INSIGHTS TWENTY31 INTERPRETATION FROM MULTIPLE SOURCES

- GLOBAL: Destinations, including those that have been hit the hardest, are beginning to ease restrictions following a careful phased approach, beginning with increased movement of residents within their communities and the opening of some non-essential businesses. Other phases anticipated include a further easing of restrictions to additional businesses. We have not verified any destinations that have committed to a date for unencumbered re-opening of borders.
- GLOBAL: Many destinations are keeping an eye on trailblazing provinces, states and countries that are easing restrictions to evaluate approaches taken, the impact of those approaches, and to provide clues to what the 'next normal' looks like within those destinations.

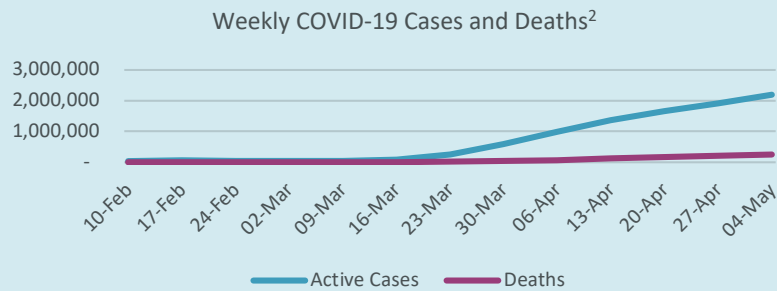
- GLOBAL: Most travel channels have been hit hard, from airlines to cruise, requiring significant government bail-outs to avoid bankruptcy. Rubber tire will be the dominant transportation mode for many travellers once travel restrictions ease. Many destinations are preparing plans for tourism marketing to be executed as soon as triggers to do so allow – primarily announcements by government and health authorities stating it is safe to allow the movement of travellers.
- GLOBAL: The concept of travel 'bubbles' or 'safe corridors' is beginning to gain traction in destinations that have had a low case count, are perceived to be of very low risk, or those that do not have access to neighbouring regions that can supply a travel market such as many small island nations. Currently, bubble travel is being discussed between New Zealand and Australia.
- GLOBAL: Across the world, all signs indicate that cross border travel will be very limited until the September to November timeframe.
- CANADA: For the most part, the situation in Canada has not changed significantly since last week, with the exception of a few provinces easing restrictions on the opening of some non-essential businesses and the movement of residents within their communities.

CURRENT TIMELINE



OVERVIEW

HEALTH IMPACT



- GLOBAL: Confirmed deaths caused by COVID-19 surpassed 250,000 globally, while worldwide cases climbed above 3.6 million – globally, the virus continues to peak
- GLOBAL: The World Health Organization continues to believe the outbreak is a global public health emergency¹
- GLOBAL: A German company working with US pharmaceutical giant Pfizer has begun human trials of a potential vaccine that could supply millions by the end of the year³
- GLOBAL: Australia and New Zealand have reached a formal agreement to establish a trans-Tasman travel 'bubble' as soon as it is safe to allow flights between the two countries⁴
- GLOBAL: On Monday, Italy loosened some of its strictest lockdown provisions. About 4.5 million people were expected to return to factories and construction sites, parks re-opened, and joggers and cyclists can now legally move farther than 600 feet from their homes⁵
- GLOBAL: In the US, commerce has started to resume in pockets of the country, including Georgia and Colorado, even as the virus continues to spread⁶
- CANADA: Ontario, Quebec, Alberta, Manitoba, and Saskatchewan are set to take another step out of lockdown by allowing the resumption of some economic and social activities that have been halted for more than a month⁷
- CANADA: As of May 3, there have been a total of 60,772 confirmed cases and 3,854 reported deaths in Canada⁸
- CANADA: Ottawa-based Spartan Bioscience Inc. is recalling thousands of its newly approved portable units that promised a rapid test for COVID-19 now that Health Canada has suspended the regulatory approval it granted last month⁹
- CANADA: Prime Minister Justin Trudeau said in light of the new restrictions on the rapid test kit, it's now up to the provinces to decide whether they can still ease lockdown restrictions this week or whether they need to reopen their economies more slowly¹⁰

KEY TAKEAWAY: Countries and the provinces / territories across Canada are now looking at ways to restart parts of their economies in a safe way and shift to recovery. There are no formal commitments nor guidance by provincial governments supporting the conditions for tourism to resume yet. Vaccine development and rapid testing technology remains a priority for Canada.

ECONOMIC IMPACT

- GLOBAL: The World Tourism & Travel Council (WTTC) estimates 63 million tourism jobs in Asia are at risk – close to five times the number in Europe and close to eight times the number in North America¹¹
- GLOBAL: According to a recent study by top US and British economists, green projects such as boosting renewable energy or energy efficiency create more jobs, deliver higher short-term returns and lead to increased long-term cost savings relative to traditional stimulus measures¹²
- CANADA: There have been 4,100 non-permanent hotel closures and 250,000 layoffs across the country – 83% of the industry workforce – the Hotel Association of Canada said¹³
- CANADA: More than 7.2 million people have applied for some form of emergency unemployment assistance since the crisis began, Canadian government data shows¹⁴
- CANADA: The plunge in Canadian consumer confidence over the past two of months seems to have come to a halt for now, with sentiment levels stabilizing for a third straight week. The number of Canadians who believe the nation's economy will weaken over the next six months recorded its second weekly decline - to 76.1% from 80.2% two weeks ago¹⁵

KEY TAKEAWAY: Across all sectors, tourism has been hit with major job losses and more cuts are expected as the pandemic continues. Despite the challenges and uncertainty within Canada, consumer confidence has stabilized slightly over the last few weeks.

FOCUS CASE STUDY: PRINCE EDWARD ISLAND – OPENING IN PHASES

- On April 28th, Prince Edward Island (PEI) announced its 'Renew PEI, Together' plan outlining the guiding principles and phased approach to the reopening of businesses, services and public spaces.
- The plan is being implemented in four distinct phases with a progressive lifting of public health measures on individuals, communities and organizations.
- The first phase, which began on May 1, allows no more than five individuals involving people from different households, while maintaining physical distance (e.g., deck and driveway visits, walks) to conduct outdoor recreational activities, as well as the re-opening of select outdoor and construction services. The next phase will begin on May 22 and allows for small indoor gatherings and larger participation of outdoor recreational activities.
- Phase three is tentatively scheduled for June 12 with slightly larger indoor and outdoor gatherings and the reopening of personal services, indoor dining and accommodations to residents (with restrictions). There is no date set for phase four yet, which will include connecting with those from other provinces and countries.

KEY TAKEAWAY: Destinations like PEI, even with a low COVID-19 case count (27 with 24 recovered), are easing restrictions gradually and slowly. Destinations that have had a larger outbreak will look to PEI to evaluate the effectiveness of phasing the easing of restrictions that may serve as pre-conditions for a slow and phased resumption of tourism. They will also look to PEI to assess policies put in place to manage visitation (i.e., social distancing, cleanliness and hygiene, capacity, etc.), within the province, and eventually across provinces and countries.

AVIATION

- GLOBAL: British Airways will cut up to 12,000 jobs as the airline's owner warned COVID-19 recovery will take "several years."¹⁶
- GLOBAL: Ryanair is planning to cut up to 3,000 jobs and operate fewer than 1% of flights through June after warning that passenger demand and pricing will take at least two years to recover¹⁷
- GLOBAL: Middle East state carriers Emirates and Etihad Airways believe it could take three years for air travel demand to return to levels seen just before the COVID-19 pandemic broke out, according to the US-UAE business council¹⁸
- GLOBAL: "The use of face covering inflight is among the measures proposed in an industry roadmap for the restart of flights that we are discussing with industry stakeholders and governments," said an International Air Transport Association (IATA) spokesperson¹⁹
- GLOBAL: The US Transportation Security Administration's count of passengers reached 171,563 on Friday, the highest since Sunday, March 29, when the total was 180,002²⁰
- GLOBAL: United Airlines wants to make a strong return to China in June and will "pencil in" a relaunch of passenger service with four flights to three cities – Beijing, Chengdu, and Shanghai²¹
- CANADA: Air Canada, Sunwing and American Airlines all outlined that about post-pandemic operations are focused on making sure planes are kept clean. Some airlines are changing how often they sanitize their planes and are even considering changes to how air is circulated in passenger cabins²²
- 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 31.²³ Swoop suspended all transborder and international flights until May 31.²⁴ Porter Airlines suspended all flights until June 29²⁵
- CANADA: Air Canada reported that first-quarter revenue fell 16% to CAD\$3.7 billion, the first time in 27 consecutive quarters it has not had revenue growth²⁶

KEY TAKEAWAY: Airlines continue to suffer losses and as a result lay off staff and trim costs. The general consensus is that recovery may take at least 2-3 years and will involve various operational and inflight changes to ensure passenger safety and comfort. It is highly likely routes and frequencies will change.

ACCOMMODATION & EVENTS

- GLOBAL: In a survey of business event planners and suppliers, eight out of 10 planners said designing digital event experiences was a skillset they were seeking to develop and around half of suppliers said the same²⁷
- GLOBAL: Research on the incentive travel industry reveals that third party providers and corporate end user organizations value incentive travel award programs, and that budgets for these hard-earned awards are largely being protected²⁸
- GLOBAL: Venues in Western Australia will have to undergo new online training before they are allowed to reopen. Around 70,000 hospitality workers are expected to complete the hygiene training course, which is being funded by the Western Australia Government²⁹
- GLOBAL: The Thailand Convention and Exhibition Bureau (TCEB) is planning to kick start its business events sector recovery from the second half of the year, with industry leaders cautiously optimistic that the earliest return to business will be in Q4 2020. TCEB's SVP, strategic marketing and business development, Ms. Nichapa Yoswee, believes that Asia will be the first region to recover³⁰
- CANADA: Tourism Toronto says the city will be down 120,000 business visitors from April through June as major events such as the Collision tech conference are cancelled or postponed, depriving the metropolis of an estimated CAD\$250 million in spending³¹
- GLOBAL: Club Med's North America CEO believes that early recovery for resorts will rely to last-minute bookings³²
- GLOBAL: Online travel guide Trip101 reported a recent increase in the average number of nights per booking for vacation rentals in the US, Japan, Canada, and other major countries – from approximately three nights to eight nights³³
- GLOBAL: The Singapore Hotel Association (SHA) has partnered with the hospitality analytics company STR to offer benchmarking tools for Singapore's hotels. The tools will allow hotels to track advancements in their performance and benchmark against competitors³⁴
- GLOBAL: Airbnb has set aside US\$250 million to help hosts. But the money covers about 25% of their cancellation fees, which is a fraction of what they used to make. They are also offering US\$5,000 grants to high-volume hosts that have used the platform for at least a year³⁵
- GLOBAL: "Demand has grown slightly across the country (US) during the last two weeks, which could provide some hope that the levels seen in early April were indeed the bottom—especially with some states now moving to ease social distancing guidance," said Jan Freitag, STR's senior VP of lodging insights. Aggregate data for the Top 25 Markets showed larger declines than the national averages: occupancy (-67.2%), ADR (-48.8%) and RevPAR (-83.2%)³⁶
- CANADA: In Canada, for the week ending April 25, average RevPAR declined 84.4%. Among the provinces and territories, Quebec experienced the largest drop in occupancy (-87.7% to 7.9%), Newfoundland and Labrador matched for the other largest decline in occupancy (-87.7% to 7.1%), and British Columbia posted the steepest drop in ADR (-39.5% to CAD\$105.48)³⁷

KEY TAKEAWAY: Business event professionals and destination marketing organizations have expressed a keen interest in developing new and more strategic ways to generate leads. On the workforce development side, more organizations are indicating a strong desire to offer training on virtual solutions and digital experiences. Hotels are beginning to consider which changes may be required to provide assurance to guests of room cleanliness, 'touchless service', and other aspects of the traveller experience.

CRUISE

- GLOBAL: Royal Caribbean plans return to service globally on June 12 with some exceptions because of port closures, including service in Alaska, Canada and New England (with sailings possibly to resume on July 1, 2020)
- GLOBAL: Norwegian Cruise Lines said it plans to relaunch cruise operations on July 1³⁸
- GLOBAL: Carnival Cruise Line plans to resume some North American sailings starting August. 1. The return to service will take a "phased-in approach," according to the company, focusing on eight ships from three homeports in Texas and Florida³⁹
- GLOBAL & CANADA: Disney Cruise Line extended its operations suspension through June 18 for most sailings; through July 2 for the Disney Magic; and all Vancouver sailings until the end of June. MSC said its global fleet pause would extend until July 10 from May 29⁴⁰
- GLOBAL & CANADA: American Queen Steamboat Company plans to open its Great Lakes season on July 5⁴¹

KEY TAKEAWAY: Key global cruise companies are revealing differing approaches and dates to relaunch their services, thus far scheduled for the summer months – subject to health guidelines, authorities and country policies.

ONLINE TRAVEL AGENCIES (OTAS)

- GLOBAL: Booking Holdings, the parent of Booking.com, Priceline and Kayak, will slash its ad spending on Google from about US\$4 billion in 2019 to US\$1 billion to US\$2 billion this year, according to Mark Mahaney, an analyst at RBC Capital Markets⁴²
- GLOBAL: TripAdvisor CEO Steve Kaufer informed employees Tuesday morning in a town hall meeting that the company is reducing its global workforce by 25%, including 600 US employees as part of a broader restructuring⁴³

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

MAJOR TOUR OPERATORS

- GLOBAL: The German association for tour operators said it had lost over US\$5.21 billion in sales up until the end of April, and the tourism sector would now need urgent government assistance⁴⁴
- GLOBAL: Caribbean resorts are warning they could soon be out of business if they don't receive money owed by tour operators in markets including Canada, the UK, Europe and the US⁴⁵
- GLOBAL: Air Canada Vacations is offering clients booking new packages to the Caribbean, Mexico, Florida, Hawaii, Las Vegas, Europe and Canada a reduced deposit, down from CAD\$250 to CAD\$100 per person. The offer is for travel June 1, 2020-April 30, 2021⁴⁶
- GLOBAL: Travel Edge has invested US\$50 million in a new limited-time signing bonus program for luxury travel advisors. The company says they are looking for travel advisors who want to join "a secure, stable, luxury travel company that believes in the future of travel."⁴⁷
- GLOBAL: Beginning May 15, Collette Tours will begin capping the number of passengers per departure on their larger group tours. Jeff Roy, Executive Vice President of Revenue Management and Pricing for Collette said, "There will be a lot of empty seats on the coaches to allow people to spread out and travel with smaller groups of people...and we're looking to have wellness checks with our customers before they come on tour, and giving our tour managers some strong influence on being able to address any health or sickness issues that could emerge, to protect the entirety of the group."⁴⁸
- GLOBAL: G Adventures is offering a limited time "Book with Confidence" policy for customers with tours departing before Dec. 31, 2020, allowing them to cancel and rebook up to 14 days prior to departure⁴⁹
- GLOBAL: Intrepid Travel has suspended all trips through September. The company also asked customers to take a 110% future travel credit instead of a refund to help support the company and its sustainability mission⁵⁰
- GLOBAL: "Consumer sentiment in situations like these really move through four phases; fear, understanding, action, and recovery. And we can help them feel more at ease obviously by staying informed, protecting [clients'] travel investments, and communicating frequently," said Alison Hickey, President of Kensington Tours⁵¹
- GLOBAL: According to Tui's CEO Fritz Jousen, "The traffic on our booking websites is 90% compared to the previous year, although travel is currently not possible. Bookings for 2021 are also at a favourable level."⁵²

KEY TAKEAWAY: Although tour operators are deep in internal conversations to manage their current cash flow challenges, they are also innovating and keeping customer communication lines open. Many of the major players have announced new pricing policies to encourage early booking and flexible cancellations.

TRAVELLER BEHAVIOURS

- GLOBAL: "A quick and effective restart of travel will only happen if governments around the world agree to a common set of health protocols developed by the private sector, such as those we've outlined," Gloria Guevara, WTTC President & CEO. "These must provide the reassurance travellers and authorities need, using new technology, to offer hassle-free, pre-vaccine 'new normal' travel in the short term."⁵³
- GLOBAL: September now has the highest number of American travellers with tentative trip plans, with increases reported in November and December, as well⁵⁴
- GLOBAL: Amongst American travellers, there has been a 57% increase in people talking about or dreaming of a vacation on social media over the last thirty days and a 130% increase in online conversations about needing or wanting a vacation⁵⁵
- GLOBAL: Skyscanner's research suggests that 85% of Americans believe it will be safe to fly domestically by this fall and 74% think an international flight will be okay⁵⁶
- GLOBAL: China's inbound tourism market will take a long time to recover as the country must work on repairing its brand image, which has been marred due to the negative narrative in international media, as well as its close ties to the virus outbreak, according to GlobalData⁵⁷
- GLOBAL: Sojern reported that while flight searches and bookings remain down, European countries that have announced steps to reduce or ease their lockdowns, are slightly less down when compared to countries that are still in the midst of full lockdown⁵⁸
- GLOBAL: Flight searches and bookings across Asia Pacific continue to increase in China, South Korea, and Vietnam⁵⁹
- GLOBAL: A recent McKinsey & Co survey showed that between 20% and 30% of respondents in China said they will continue to be cautious, either consuming slightly less or, in a few cases, a lot less⁶⁰

KEY TAKEAWAY: As some restrictions continue and others begin lifting, travellers have started searching more and showing some travel desire. Research is showing that, at least in the North American market, car travel will be more attractive in the short-term.

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