

# STATE OF TOURISM IN CANADA DURING COVID-19

DASHBOARD REPORT #8

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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.

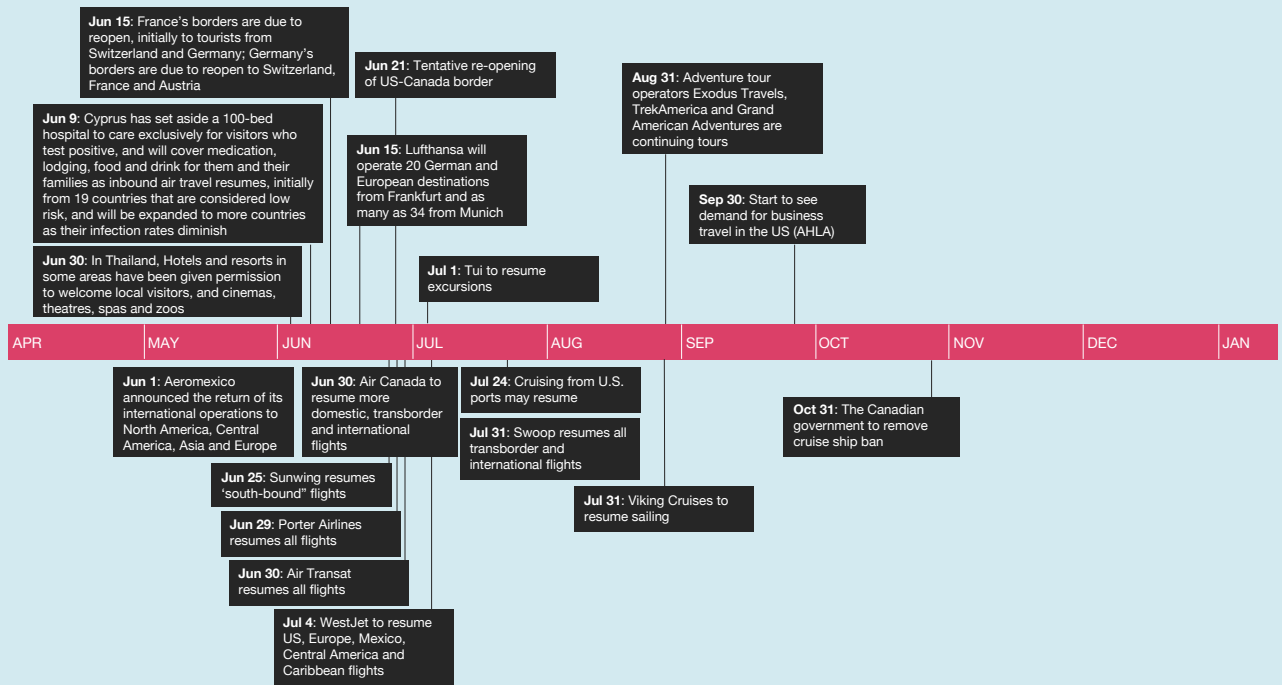
**The dashboard now includes a new 'Global Easing of Travel Restrictions' section that tracks, in a visual format, announcements made by select national and provincial/state policymakers on the easing of travel restrictions in their jurisdictions.**

## KEY INSIGHTS TWENTY31 INTERPRETATION FROM MULTIPLE SOURCES

- GLOBAL: The resumption of tourism continues gradually with countries like China, South Korea and others transitioning to a phase allowing for international travel in safe corridors, or "bubbles". However, for many destinations that have or that will begin to open their borders to such tourism bubbles, restrictions such as 14-day quarantine periods will be enforced.
- GLOBAL: Some destinations like Cyprus are creating plans to return to tourism in a cautious manner in order to avoid allowing infected persons to enter the destination, but also to accommodate for possible tourism infections while visiting. This suggests that rather than wait until the pandemic is over, countries that are especially dependent on tourism as a driver of the economy, will have to develop innovative ways of living with COVID-19 in the near-term.

- **GLOBAL:** Indicators from aviation to accommodation have been trending in a positive direction over the last few weeks though the general consensus is that it will take several years before tourism returns to 2019 levels. It is critical for destinations to follow these recent movements in order to properly plan tourism to their destinations – e.g., there are several instances where airlines will no longer be flying to specific destinations due to the pandemic, which in turn may lead to operators pulling back from operating in those destinations, and so forth, causing a ripple effect potentially exacerbating the impact of the pandemic on local economies.
- **CANADA:** The Canadian federal government announced funding to support the recovery of communities across the country. Destination Canada and Provincial and Territorial Marketing Organizations will play a key role in investing these funds. Those destinations that have prepared a strategic action plan (including a marketing plan) for post-COVID-19 recovery will be best positioned to see a return to tourism more rapidly.
- **CANADA:** Some places in Canada are instituting policies like the ‘double-bubble’ in which two families can meet with each other. Some destinations are already developing products and itineraries that would allow these joint families to travel together to experience a destination’s offerings.

## 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.

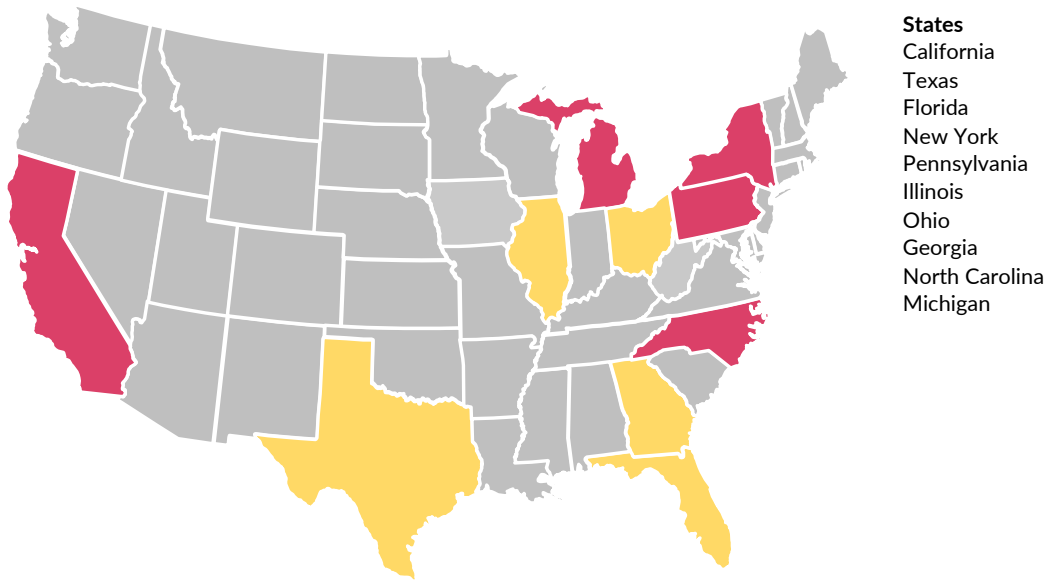
	<b>CURRENT STATE:</b> No tourism; Non-essential business closed; Physical distancing
	<b>PRE-CONDITIONS FOR TOURISM:</b> Limited opening of public spaces; Some emergence of local economy; Intra-provincial/state travel measures in place
	<b>SOME DOMESTIC TOURISM (BUBBLE):</b> Intraterritorial border opening;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

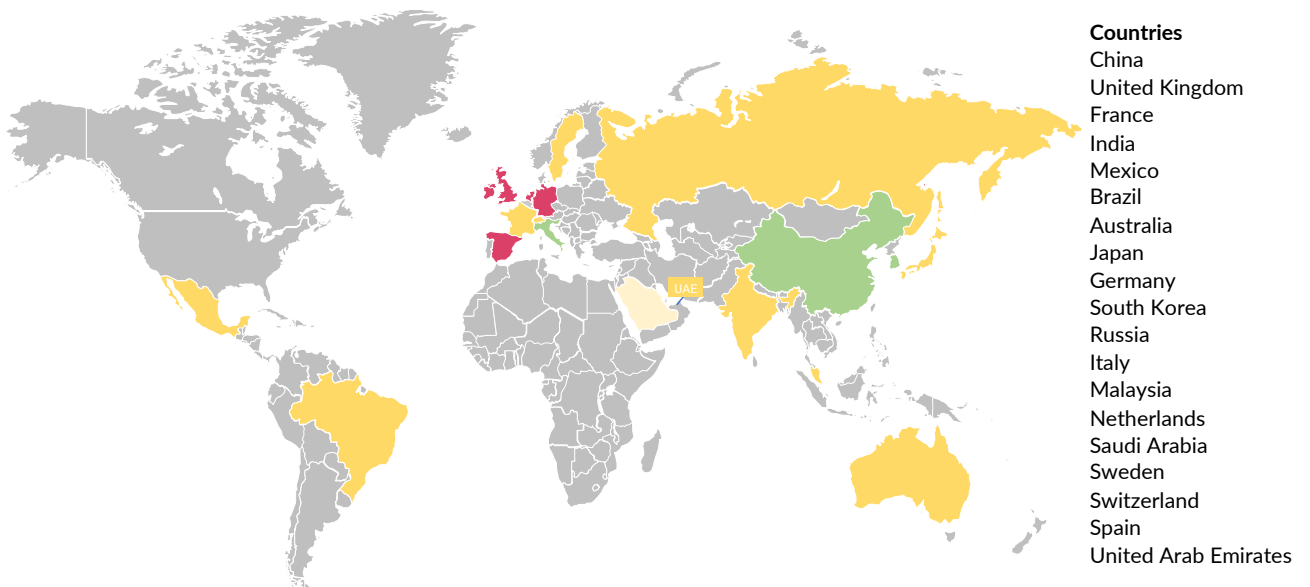


## COVID-19 RESTRICTIONS: TOP 10 MOST POPULATED STATES IN THE US

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

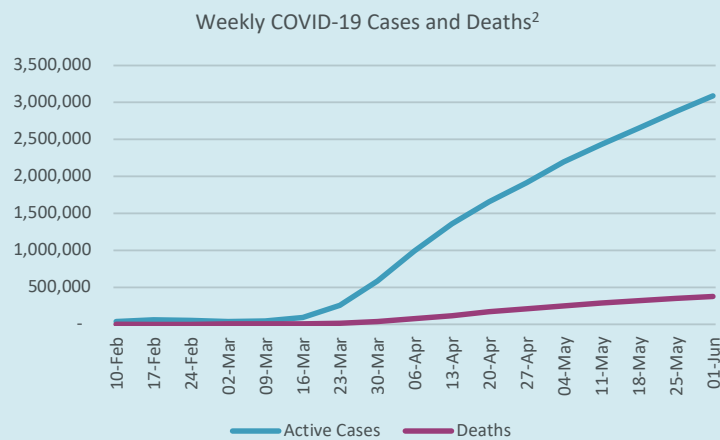


## COVID-19 RESTRICTIONS: CANADA'S TOP SOURCE MARKETS AND TOP GLOBAL OUTBOUND MARKETS (EXCLUDING US)



## OVERVIEW

### HEALTH IMPACT



- GLOBAL: Confirmed deaths caused by COVID-19 surpassed 370,000 globally, while worldwide cases climbed above 6.3 million; affecting 213 countries and territories
- GLOBAL: The World Health Organization continues to consider the outbreak a significant global public health emergency<sup>1</sup>
- GLOBAL: Though the number of new deaths has been curving downward, the virus continues to circulate widely within the US<sup>3</sup>
- GLOBAL: France's borders are due to reopen, initially to tourists from Switzerland and Germany, from June 15; Germany's borders are due to reopen to Switzerland, France and Austria from June 15<sup>4</sup>
- GLOBAL: The UK Foreign Office is currently advising against all but essential international travel for an indefinite period<sup>5</sup>
- GLOBAL: Cyprus has set aside a 100-bed hospital to care exclusively for visitors who test positive, and will cover medication, lodging, food and drink for them and their families. Inbound air travel resumes on June 9, initially from 19 countries that are considered low risk, and will be expanded to more countries as their infection rates diminish<sup>6</sup>
- GLOBAL: Hotels and resorts in some areas have been given permission to welcome local visitors, and cinemas, theatres, spas and zoos on June 1, under strict conditions, according to a statement from the Tourism Authority of Thailand<sup>7</sup>
- GLOBAL: According to the UNWTO, 100% of all destinations worldwide continue to have some form of COVID-19-related travel restrictions in place. All regions have more than 65% of their destinations completely closed to tourism: Africa (74%), Americas (86%), Asia and the Pacific (67%), Europe (74%) and the Middle East (69%)<sup>8</sup>

- CANADA: In Canada, the epidemic is highly regional, with the vast majority of COVID-19 cases concentrated in parts of Ontario and Quebec<sup>9</sup>. BC health officials are warning that COVID-19 is still circulating in the community as another 24 cases of the virus have been recorded over the last two days<sup>10</sup>
- CANADA: As of May 29, there have been a total of 88,856 confirmed cases and 6,918 reported deaths in Canada<sup>11</sup>

**KEY TAKEAWAY: Even as COVID-19 cases rise globally, governments are taking action to recover tourism by planning to promote domestic tourism, open national borders to bubble tourism, and allow tourism businesses to reopen their doors.**

## ECONOMIC IMPACT

- GLOBAL: In the US, national weekly travel spending grew by 13% to US\$3.4 billion last week (its highest level since March), aided by Memorial Day Weekend as well as the continued easing of lockdown measures<sup>12</sup>
- GLOBAL: Researchers estimate that 42% of pandemic-induced layoffs will result in a permanent job loss<sup>13</sup>
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- GLOBAL: Advertising investment is set to fall 8.1% – US\$49.6 billion – worldwide this year<sup>15</sup>
- CANADA: Over the next 18 months, Destination Canada will invest \$30 million with Provincial and Territorial Marketing Organizations to support the recovery of communities<sup>16</sup>
- CANADA: The Tourism Industry Association of Ontario will receive \$30 million in FedDev Ontario Regional Relief and Recovery Fund funding to provide financial relief to DMOs across southern Ontario that have experienced significant revenue shortfalls<sup>17</sup>
- CANADA: Output in accommodation and food services industries fell by 36.9% in March, the largest decline on record. From February to April, employment declined by half (50%) while hours worked decreased by almost two-thirds (63.8%)<sup>18</sup>
- CANADA: Landlords in BC who are eligible for emergency federal rent relief and choose not to apply will not be able to evict businesses that aren't able to pay rent<sup>19</sup>

**KEY TAKEAWAY: The federal government announced funding to support the recovery of communities across Canada. Destination Canada and the Provincial and Territorial Marketing Organizations will play a key role in investing these funds.**

## FOCUS CASE STUDY: CYPRUS – PAY AND THEY’LL COME

- Cyprus says it will ease restrictions on international air travel on June 9. But the island has been returning to normal business activities for the past month. It has restarted its hospitality economy on June 1 – one day after having achieved full containment of the coronavirus.
- The first visitors will be required to pass coronavirus tests in their home nations within 72 hours of their trip. But that and other restrictions will be dropped for those from certain countries, depending on their “epidemiological status.”
- Cyprus will conduct an ‘epidemic risk assessment’ of countries on a weekly basis, using criteria that ranges from testing capacity to the rates of new cases and deaths. The first iteration of that list categorizes 13 countries as “low risk,” from Malta, Israel and Greece to Germany, Norway and Slovakia.
- If tourists are diagnosed during their visit, they can use special facilities that are being reserved for them: “a COVID-19 hospital with 100 beds will be made available exclusively for travelers who test positive,” the plan states, adding that capacity can be expanded at very short notice.
- The plan also includes a range of details about how the country’s restaurants and beaches will work to reduce the chance of infection, from requiring more than 12 feet between beach umbrellas to disinfecting salt and pepper mills.<sup>20</sup>

**KEY TAKEAWAY:** Some destinations are creating detailed tourism resumption plans that seem to consider that COVID-19, at least in the near future, will be a fact of life that travellers need to live with. While trying to ensure infected visitors do not arrive in the destination in the first place is a priority, some destinations are taking initiatives to accommodate for a potential spike in COVID-19 cases among their guests, such as the preparation of a specific COVID-19 hospital with 100 beds. Avoiding COVID-19 cases is the ultimate objective, but destinations where tourism makes up a major portion of their GDP, devising strategies that consider life with the virus may balance the decision governments need to make between physical health and economic health. Destinations whose GDP is not as reliant on tourism should examine some of these innovative approaches as well.



## AVIATION

- GLOBAL: Global capacity has bounced into June with 5.7 million seats added week on week, some 267,000 additional flights are scheduled to operate this week representing a near 16% increase on last week through a combination of the returning carriers and some capacity growth<sup>21</sup>
- GLOBAL: From June 15, Lufthansa will operate 20 German and European destinations from Frankfurt and as many as 34 from Munich<sup>22</sup>
- GLOBAL: Air China is planning to operate 24 international routes between June 1 and July 1<sup>23</sup>
- GLOBAL: Aeromexico announced the return of its international operations to North America, Central America, Asia and Europe. Flights to Houston, New York and Los Angeles are to continue operations, and flights to Chicago, Montreal, Toronto and Vancouver would resume on June 1<sup>24</sup>
- GLOBAL: The US Transportation Security Administration recorded 352,947 passengers passing through its checkpoints. The TSA last handled more passengers in a day on March 22<sup>25</sup>
- GLOBAL: Southwest Airlines posted its flight schedule running from October 31 through January 4, 2021. The airline intends to lure more leisure and business travelers through its key hubs using additional flights and new routes during the fall and winter holidays<sup>26</sup>
- GLOBAL: American Airlines will end service to Oakland, California, on June 3 becoming the first U.S. carrier to say it would permanently exit a city because of the pandemic<sup>27</sup>
- GLOBAL: United Airlines will resume flying a quarter of its schedule in July as the carrier builds back its route map<sup>28</sup>
- CANADA: Air Canada has restarted US flights to New York LaGuardia, Washington Dulles, Chicago O'Hare, Los Angeles, San Francisco and Boston<sup>29</sup>
- CANADA: Air Canada is tentatively planning to resume more domestic, transborder and international flights by June 30<sup>30</sup>; WestJet suspended all US, Europe, Mexico, Central America and Caribbean flights through July 4<sup>31</sup>; Air Transat is continuing suspension of all flights until June 30<sup>32</sup>; Sunwing suspended all 'south-bound' flights until June 25<sup>33</sup>; Swoop suspended all transborder and international flights until July 31<sup>34</sup>; Porter Airlines suspended all flights until June 29<sup>35</sup>

**KEY TAKEAWAY: Airlines are slowing increasing capacity, however, a very cautious outlook is still needed. Traveller confidence will quickly need to match these increases to maintain recovery.**

## ACCOMMODATION & EVENTS

- GLOBAL: The Hong Kong Tourism Board (HKTB) will introduce a multi-pronged recovery plan for the MICE industry. It includes a MICE business matching platform, which will enable event organizers to meet with MICE trade partners<sup>36</sup>
- GLOBAL: In a Global DMC Partners survey of meetings and events industry planners, compared to last year, 20% more planners are reporting a decrease in their meeting budgets for the remainder of this year and 17% are reporting a cutback in their incentive budgets. These decreases are most apparent amongst planners outside of the US<sup>37</sup>
- GLOBAL: A bubble was opened for business travellers moving between 10 Chinese regions and South Korea. The conditions are that they must test negative for COVID-19 prior to departure and upon arrival<sup>38</sup>
- GLOBAL: US Airbnb occupancy rates, the percentage of nights properties listed on Airbnb are booked over the next 90 days, are now up 17.1 % in the last 30 days. While this still constitutes a year-on-year drop of 36.4%, the latest data marks the fifth-straight week both the average increased and the year-over-year decline decreased<sup>39</sup>
- GLOBAL: Four of the Top 25 US Markets saw occupancy levels above 40%: New York (44.9%), Tampa/St. Petersburg, Florida (41.5%), Norfolk/Virginia Beach, Virginia (40.5%), and Phoenix, Arizona (40.1%)<sup>40</sup>
- CANADA: In Canada, for the week ending May 25, average RevPAR declined 82.7%. Among the provinces and territories, British Columbia (22.8%) and Saskatchewan (20.2%) were the only two provinces with occupancy of at least 20.0%. Vancouver was the only major market above that mark. The lowest occupancy among provinces was reported in Newfoundland and Labrador (9.6%)<sup>41</sup>

**KEY TAKEAWAY: As travel bubbles form and domestic travel restrictions loosen the hotel and rental sectors is seeing some occupancy rates improve.**

## CRUISE

- GLOBAL: Viking Cruises announced that it will not sail any of its cruises through the end of August. Guests on impacted sailings are being offered a 125% future cruise credit or a full refund of all monies paid <sup>42</sup>
- GLOBAL: Carnival has partnered with Infrared Cameras Inc. to add thermal camera systems for passenger and crew member temperature screenings<sup>43</sup>
- CANADA: The Canadian government extended the ban on cruise ships with more than 100 passengers through October 31<sup>44</sup>
- CANADA: Hornblower subsidiary Victory Cruise Lines (VCL) has announced that it will cancel all planned itineraries for the remainder of the 2020 season. VCL, is one of the leading cruise operators on the Great Lakes<sup>45</sup>

**KEY TAKEAWAY: With an extended cruise ship ban, the Canadian cruise season is largely shut down for 2020. This is expected to have a severe impact on cruise dependent destinations. However, small boats for excursions will be permitted, subject to local regulations.**

## ONLINE TRAVEL AGENCIES (OTAS)

- GLOBAL: Expedia Group is committing US\$275 million to help partners rebound from the impact of COVID-19 and fuel industry-wide recovery efforts<sup>46</sup>
- GLOBAL: Airbnb has launched Online Experiences in an effort to help both hosts and guests connect, experience virtual travel and earn income. They have partnered with local organizations to offer these new experiences free of charge<sup>47</sup>

**KEY TAKEAWAY: Recovery efforts and shifts in products and services continue to be rolled out by the major OTAs.**

## MAJOR TOUR OPERATORS

- GLOBAL: Hays Travel is placing suppliers that still owe it money for cancelled holidays, as a result of COVID-19, on stop-sell from this week<sup>48</sup>
- GLOBAL: Abercrombie & Kent added six adventures across the American West and Alaska as well as two Great American Road Trips with private guides and vetted accommodations for space and privacy. Globus and Intrepid have said they will unveil US domestic products in the coming weeks<sup>49</sup>
- GLOBAL: To support the Australian travel trade, The Travel Concierge Sri Lanka is offering all agents the ability to book future holidays without the need to pay a deposit<sup>50</sup>
- GLOBAL: Tui cancelled all excursions until July 1<sup>51</sup>
- GLOBAL: Air Canada Vacations has notified the trade that Air Canada's operating schedule for June 2020 includes service to Cancun, Varadero, Cayo Coco, Montego Bay, Barbados, Paris, Athens and Barcelona<sup>52</sup>

**KEY TAKEAWAY: Tour operators are reacting to airline capacity announcements. Tour operators that typically focus on the needs of international markets are now adapting their offerings for domestic audiences.**

## TRAVELLER BEHAVIOURS

- GLOBAL: One in five Americans are already traveling or ready to travel with no hesitations. These Americans have fewer concerns surrounding the virus, and are more likely to prioritize having new experiences in their lives<sup>53</sup>
- GLOBAL: Americans view road trips, staying at a beach resort, and visiting national and other parks are among the highest rated relaxing travel experiences<sup>54</sup>
- GLOBAL: In the US the Memorial Day Weekend was the most dramatic increase in weekend-over-weekend road trips in 2020, bringing road trip activity to within 70-80% of normal summertime volumes for many destinations throughout the country<sup>55</sup>
- GLOBAL: According to ForwardKeys, domestic air travel in China has now reached more than 50% of what it was at the equivalent moment in 2019, based on issued air tickets. The lead time between ticketing and travel shortened dramatically; 72% of flight tickets were issued within 4 days of the travel date, compared with 51% at the equivalent point in 2019<sup>56</sup>
- GLOBAL: In a survey of Chinese travellers, COTRI China Outbound Tourism Research Institute found that the majority of travellers aged 34 or younger had voted for "a different form of tourism, more respectful of the visited communities and of nature", as well as "avoiding mass tourism destinations and large cities" and "not wishing to visit certain countries and regions that are at risk from a health point of view"<sup>57</sup>

- GLOBAL: According to Sojern, European travel intent to the UK remains well below that of the European countries who are opening their borders without any self-isolation rules<sup>58</sup>
- GLOBAL: 72% of GCC travellers will travel for leisure, with a change in scenery being their first priority and 80% will travel for a duration of one week or more<sup>59</sup>
- CANADA: Canadians under 44 are more likely to be planning or thinking about taking a summer vacation (49%) than older Canadians (40%). Those in BC (52%) and Alberta (54%) are more likely to be planning or thinking about taking a summer vacation than those in Ontario (43%) or Quebec (36%)<sup>60</sup>
- CANADA: 86% of Canadians are concerned about a second wave of COVID-19 in the fall<sup>61</sup>

**KEY TAKEAWAY: Travel intentions and overall confidence is growing, especially where travel restrictions are loosening. Within Canada, those under 44 are more likely to be planning or thinking about taking a summer vacation.**

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