

# STATE OF TOURISM IN CANADA DURING COVID-19

DASHBOARD 2.0 – JULY 2020

# STATE OF TOURISM IN CANADA DURING COVID-19 DASHBOARD 2.0

The 'State of Tourism in Canada during COVID-19' Dashboard 2.0, compiled by Twenty31 analysts, provides a monthly 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 – source markets, airlines, accommodations, tourism businesses, tour operators, OTAs, and travellers.

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

---

## ABOUT ELEVATING CANADIAN EXPERIENCES PROJECT

In partnership with provinces, territories, and regional partners, Elevating Canadian Experiences aims to support the development of capacity-building for organizations and small businesses operating in the culinary and shoulder/winter tourism sectors in Canada.

Delivered through the Canadian Experiences Fund, the objective of these workshops is to assist organizations in building awareness and capacity in high potential tourism growth opportunities.

Elevating Canadian Experiences goal is to work with each partnering association to identify key markets for growth, and support the development and execution of these workshops across the country.

For more information visit [elevatingcanadianexperiences.ca](http://elevatingcanadianexperiences.ca)

**LEARN. REBUILD. GROW. | #ELEVATINGCANADA**

---

# KEY INSIGHTS

## TWENTY31 INTERPRETATION OF FINDINGS

- **GLOBAL:** Many global destinations, such as in Europe and East Asia, continue to see a growth in visitors and an expansion of their tourism businesses. Generally, however, tourism numbers, in terms of total visitors and visitor spend, are still a fraction of what they were at the peak of tourism one year ago. As most destinations are entering the height of their summer months, many tourism organizations and travellers alike are postponing the prospect of recovering any semblance of tourism to 2021.
- **GLOBAL:** Initial COVID-19 scenarios envisaged a second wave expected in the fall. Few predicted the surge in the first wave that are currently overwhelming a great number of destinations and source markets, primarily developing economies, but also major economies such as the U.S. Destinations that have planned for recovery using scenario planning approaches will find it easier to react to the unfolding situation.
- **CANADA:** Comparatively, all of Canada's provinces have managed the spread of COVID-19 reasonably well. In some provinces, there have been no cases for several weeks and others fewer than 20 per day. Nevertheless, policymakers are re-opening with caution, especially as Canada's neighbor is experiencing a resurgence in the number of cases.
- **CANADA:** Canada must also contend with a high level of negative consumer sentiment toward tourism. It is understandable that communities are fearful of COVID-19 cases returning. On the other hand, many tourism businesses are eager to salvage what is possible of 2020.



## 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
4. Phases highlighted in the tables indicate the current phase of re-opening based the provincial, state or country re-opening strategy

	PHASE 0: CURRENT STATE - No tourism; Non-essential business closed; Physical distancing
	PHASE 1: PRE-CONDITIONS FOR TOURISM - Limited opening of public spaces; Some emergence of local economy; Intra-provincial/state travel measures in place
	PHASE 2: SOME DOMESTIC TOURISM (BUBBLE) - Intranational border opening; Potential for domestic tourism bubbles
	PHASE 3: OTHER DOMESTIC TOURISM (BUBBLE) - Interprovincial/state tourism
	PHASE 4: SOME INTERNATIONAL TOURISM (BUBBLE) - National border opening; Some potential international tourism bubbles
	PHASE 5: NORMALIZED TOURISM - Domestic tourism; International tourism

## COVID-19 RESTRICTIONS: CANADIAN PROVINCES/TERRITORIES



### Provinces/Territories

Yukon  
 Northwest Territories  
 Nunavut  
 British Columbia  
 Alberta  
 Saskatchewan  
 Manitoba  
 Ontario  
 Quebec  
 Prince Edward Island  
 Nova Scotia  
 New Brunswick  
 Newfoundland and Labrador

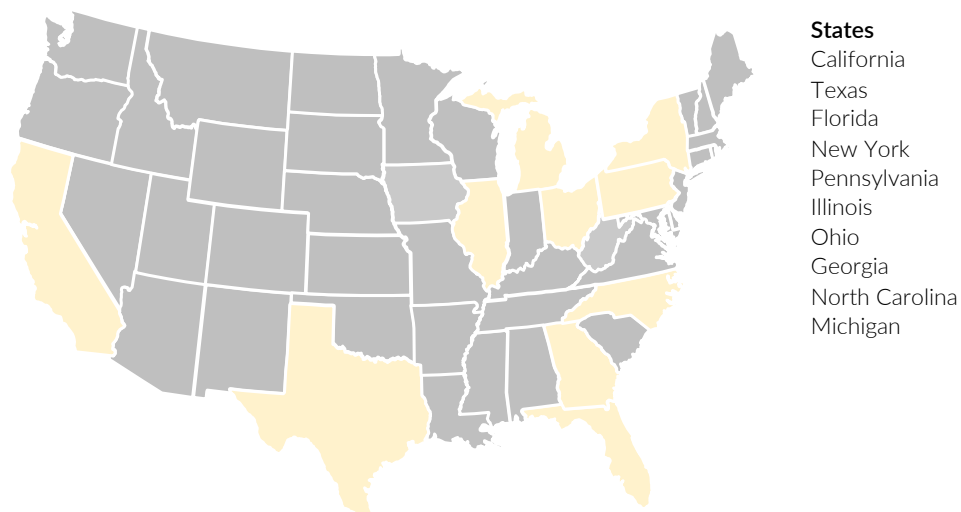
PROVINCE	TWENTY31 PHASE	CURRENT COUNTRY PHASE	COMMENTS
Ontario <sup>1</sup>	Phase 2	<p>STAGE 1 (May 19): Opening businesses that can immediately meet or modify operations to meet public health advice and workplace safety measures.</p> <p>STAGE 2 (June 12): Taking a regional approach to opening more businesses and services, as well as community, recreational and outdoor spaces, while emphasizing public health advice and personal responsibility.</p> <p>STAGE 3: Reopening most remaining workplaces and community spaces, while carefully and gradually lifting restrictions. Public health advice and workplace safety guidance will remain in place and available. Large public gatherings will continue to be restricted.</p>	Ontario currently in its stage 2 of reopening for most parts of Ontario.
Quebec <sup>2</sup>	Phase 2	<p>PRELIMINARY PHASE (April 20): Garages; mining sector; landscaping; housing construction.</p> <p>PHASE 1 (May 4): Retail trade – stores with direct outside access.</p> <p>PHASE 2 (May 11): Civil engineering, infrastructure and commercial construction work; manufacturing - 50 employees + 50% of surplus employees per shift.</p> <p>PHASE 3 (May 20): Individual outdoor sports and leisure activities.</p> <p>PHASE 4 (May 25): Retail trade – stores with direct outside access; manufacturing – 100% of employees; museums and libraries (circulation desks).</p> <p>PHASE 5: Professional and therapeutic health care personal and beauty care services; shopping centres; accommodation, camping establishments and targeted tourist activities.</p> <p>PHASE 6 (June 25): Days camps; outdoor swimming pools; restaurants; shopping centres.</p>	Quebec is in its final stage of de-confinement.
British Columbia <sup>3</sup>	Phase 2	<p>PHASE 1 (May 18): Essential travel only, physical distancing and business closures to help stop the spread of COVID-19.</p> <p>PHASE 2 (June 23): Essential travel only, physical distancing, restart of many businesses including those that were ordered closed.</p> <p>PHASE 3 (June 24): Smart and safe travel within the province, restart of in-person K-12 and post-secondary classes.</p> <p>PHASE 4 (Conditional): International tourism, restart of large gatherings.</p>	British Columbia is currently in its phase 3 of reopening.

<p><b>Alberta<sup>4</sup></b></p>	<p>Phase 2</p>	<p>STAGE 1 (May 14): Some reopening of businesses and services, while protecting Albertans.</p> <p>STAGE 2 (June 12): Further reopening of businesses with continued protections in place. Relaxing some public gathering restrictions.</p> <p>STAGE 3 (TBD): Opening all workplaces and relaxing public gathering restrictions.</p>	<p>Alberta is currently in its stage 2 of reopening.</p>
<p><b>Manitoba<sup>5</sup></b></p>	<p>Phase 2</p>	<p>PHASE 1 (May 4): Priority elective surgeries and diagnostic screening can resume. Also, numerous non-essential businesses, mainly in the retail sector, are allowed to reopen; however, this measure is optional, and a business may choose not to reopen at this time.</p> <p>PHASE 2 (June 1): Restoring of outdoor drive-in events, childcare services, schools and day camps; outdoor recreation facilities and golf; travel to northern parks, campgrounds, cabins, lodges and resorts; bars, beverage rooms, brew pubs, microbreweries and distilleries.</p> <p>PHASE 3 (June 21): Increasing indoor and outdoor group gathering sizes and permitting larger group gatherings; easing self-isolation and northern travel restrictions on travellers entering Manitoba from Western Canada, the Yukon, the Northwest Territories, Nunavut and northwestern Ontario; removing occupancy limits for retail businesses, restaurants, bars, beverage rooms, brew pubs, microbreweries and distilleries; reopening permanent outdoor amusement parks.</p>	<p>Manitoba is currently in its phase 3 of reopening.</p>

Note: Only the top five most populous provinces summarized in the table above.

## 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



STATE	TWENTY31 PHASE	CURRENT COUNTRY PHASE	COMMENTS
California <sup>6</sup>	Phase 3	<p>STAGE 1 (May 8): Stay at home except for essential and permitted activities</p> <p>STAGE 2 (May 25): Limit time outside the home and travel only for permissible activities, such as healthcare, food, outdoor exercise and recreation (individuals and households only)</p> <p>STAGE 3 (June 19): Travel for permissible activities, such as healthcare, food, and local or activities shopping related to open sectors.</p> <p>STAGE 4: Gradually resume remaining activities and travel.</p>	Most of the state is currently in its stage 3 of reopening.
Texas <sup>7</sup>	Phase 3	<p>PHASE 1 (April 27): Certain services and activities are allowed to open with limited occupancy.</p> <p>PHASE 2 (May 18): Restaurants may increase their occupancy to 50% and additional services and activities that remained closed under Phase I may open with restricted occupancy levels and minimum standard health protocols laid out by the Texas Department of State Health Services (DSHS).</p> <p>PHASE 3 (June 3): All businesses in Texas will be able to operate at up to 50% capacity, with very limited exceptions. Business that previously have been able to operate at 100% capacity may continue to do so, and most outdoor areas are not subject to capacity limits.</p>	Texas has paused reopening plans due to deteriorating health crisis.
Florida <sup>8</sup>	Phase 3	<p>PHASE 0: Individuals are urged to avoid all non-essential travel and cruises, including to U.S. states and cities outside of Florida with community spread of COVID-19.</p> <p>PHASE 1 (May 1): Individuals should avoid all non-essential travel and cruises, including to U.S. states and cities outside of Florida with substantial community spread of COVID-19.</p> <p>PHASE 2 (June 5): Individuals may resume non-essential travel.</p> <p>PHASE 3: Employees should resume non-essential travel and adhere to CDC guidelines regarding isolation following travel.</p>	Dates for the next phase of reopening have not been announced.

<b>New York<sup>9</sup></b>	Phase 3	<p>PHASE 1: Allowed construction, manufacturing, and wholesale supply-chain businesses to reopen, as well as many retailers for curbside pickup, in-store pickup, or drop off.</p> <p>PHASE 2: Allowed a greater range of businesses to reopen, including: offices, outdoor dining, places of worship (at 25 percent capacity), and storefront retailers and businesses in the professional-services, finance and insurance, administrative support, and real estate and rental-leasing industries.</p> <p>PHASE 3: Focuses on the hospitality industry, allowing restaurants and other food-service businesses to reopen for dine-in service at 50 percent capacity.</p> <p>PHASE 4: Allows schools, and low-risk arts, entertainment, and recreation businesses to reopen – all with social distancing required – but not movie theaters, shopping malls, or gyms. Gatherings of up to 50 people will also be allowed.</p>	As of June 29, all of New York's 10 regions are in the fourth and final phase of reopening.
<b>Pennsylvania<sup>10</sup></b>	Phase 3	<p>RED PHASE: Stay at home orders in place; large gatherings prohibited; masks are required in businesses; restaurants and bars limited to carry-out and delivery only; only travel for life-sustaining purposes encouraged.</p> <p>YELLOW PHASE (June 25): Stay at home order lifted for aggressive mitigation; large gatherings of more than 25 prohibited; in-person retail allowable, curbside and delivery preferable; restaurants and bars may open outdoor dining.</p> <p>GREEN PHASE: Large gatherings of more than 250 prohibited; restaurants and bars open at 50% occupancy; personal care services (including hair salons and barbershops) open at 50% occupancy and by appointment only; indoor recreation, health and wellness facilities, and personal care services open at 50% occupancy; all entertainment (such as casinos, theaters, and shopping malls) open at 50% occupancy; construction activity may return to full capacity with continued implementation of protocols.</p>	Pennsylvania is currently in its yellow phase of reopening (as of June 5).

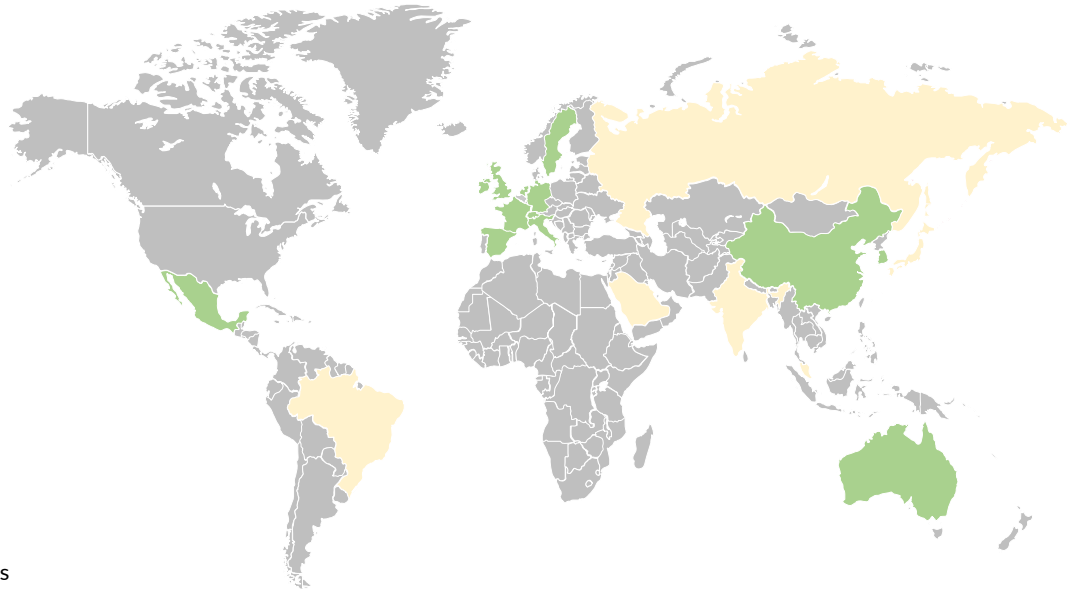
Note: Only the top five Canadian inbound states summarized in the table above.



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

### Countries

China  
 United Kingdom  
 France  
 India  
 Mexico  
 Brazil  
 Australia  
 Japan  
 Germany  
 South Korea  
 Russia  
 Italy  
 Malaysia  
 Netherlands  
 Saudi Arabia  
 Sweden  
 Switzerland  
 Spain  
 United Arab Emirates



COUNTRY	TWENTY31 PHASE	CURRENT COUNTRY PHASE	COMMENTS
China	Phase 4	Undefined	None
United Kingdom <sup>11</sup>	Phase 4	<p>STEP 1 (May 11): Encourages people back to their workplaces if they cannot work from home; 'unlimited exercise'; could rest and sit outside or play sports with members of their household</p> <p>STEP 2 (June 1): Allows people to leave the house for any reason. Up to six people from different households were allowed to meet outside, in both parks and private gardens, provided they observe social distancing rules; closed shops would reopen from 15 June.</p> <p>STEP 3 (July 4): Pubs, restaurants and hairdressers can open with social distancing measures in place. Two households can meet indoors with social distancing in place. Hotels, camping and other accommodation sites can reopen. Other facilities including outdoor gyms, museums and galleries, cinemas, places of worship, community centres and libraries can also reopen.</p>	Currently in step 2. Next step expected by July 4.

<b>France</b> <sup>12</sup>	Phase 4	<p>PHASE 1 (May 11): Small shops and markets can open with restrictions on the amount of people, while bars, restaurants, cafes and large museums will remain closed.</p> <p>PHASE 2 (June 2): Reopening of cafés and restaurants in so-called green zones, where the virus is least actively circulating. Parks and restaurant terraces alone will reopen in Paris, which is considered an orange zone, and restrictions will be lifted on travel beyond the current 100km-radius restriction.</p> <p>PHASE 3 (June 22): All nursery schools, primary schools and junior high schools will be open and attendance will be mandatory.</p>	Currently in its final phase of reopening.
<b>India</b> <sup>13</sup>	Phase 3	<p>PHASE 1 (June 8): Places of worship, malls and restaurants will now be permitted to reopen in most parts of the country.</p> <p>PHASE 2 (July 1): Domestic flights and train operation times to be expanded; Curfew will be enforced from 10 p.m. to 5 a.m.; Shops will now be allowed to have more than five people inside; schools, metro rail, theaters, bars, and gyms will all remain closed and large gatherings will continue to be banned until further notification.</p>	Currently in its phase 1 of reopening. Next step expected by July 1.
<b>Mexico</b> <sup>14</sup>	Phase 4	<p>PHASE 1 (May 13): Economic activity resumes in 269 municipalities with low numbers of COVID-19 cases.</p> <p>PHASE 2 (May 18): Country prepares for national social distancing measures to be lifted on June 1.</p> <p>PHASE 3 (June 1): The government will assess readiness of states to reopen, by using the following color-coded system:</p> <ul style="list-style-type: none"> <li>• Red: Only essential activities, as well as work in the mining, construction, and automotive industries, are allowed.</li> <li>• Orange: Limited nonessential activities may resume. Individuals vulnerable to COVID-19, such as the elderly and those with underlying health conditions, may return to work with strict social distancing measures in place.</li> <li>• Yellow: All essential and nonessential activities may resume. Restaurants, churches, museums, and theatres may reopen but at a reduced level.</li> <li>• Green: All restrictions will be lifted, and schools may reopen, although sanitary measures must be adhered to.</li> </ul>	Currently in its final phase.

Note: Only the top five Canadian inbound markets summarized in the table above.

## OVERVIEW

### HEALTH IMPACT

---

- GLOBAL: Confirmed deaths caused by COVID-19 surpassed 500,000 globally, while worldwide cases climbed above 10.4 million; affecting 213 countries and territories<sup>15</sup>
- GLOBAL: World Health Organization director, Tedros Adhanom Ghebreyesus, warned that 'The pandemic is actually speeding up,' and the world needs to learn to live with the virus without losing hope<sup>16</sup>
- CANADA: As of June 29, there have been a total of 103,918 confirmed cases and 8,566 reported deaths in Canada<sup>17</sup>
- CANADA: Canada plans to extend the sweeping travel ban that bars entry to all travellers who are not Canadian citizens, permanent residents or Americans until at least July 31<sup>18</sup>

**KEY TAKEAWAY: Although COVID-19 is steadily declining in Canada, there are still transmission hot-spots in Ontario and Quebec. Globally, COVID-19 is increasing.**

### ECONOMIC IMPACT

---

- GLOBAL: The International Monetary Fund (IMF) predicts that the global economy will shrink 4.9% this year, significantly worse than the 3% drop it had estimated in April<sup>19</sup>
- GLOBAL: In the week ending June 20, the US travel economy witnessed its eighth-consecutive week of expansion since the start of the pandemic but still registered 55% below last year's levels (a \$13.2 billion loss)<sup>20</sup>
- CANADA: Consumer confidence improved across all regions this month. British Columbia logged the largest monthly increase among provinces (23.1 points), while Ontario posted the smallest uptick (9.3 points)<sup>21</sup>
- CANADA: According to the Organization for Economic Co-operation and Development (OECD) the outlook for Canada is a decline of at least 8% this year, followed by a bounce back of 3.9%. But if and when the second wave comes, the damage to Canada could be as high as 9.4%<sup>22</sup>

**KEY TAKEAWAY: While there are pockets of optimism and increased spending, consumers are mainly buying only the essentials and the effects are being felt differently across sectors, age groups, income etc.**

## FOCUS CASE STUDY 1: UNITED KINGDOM – “WE’RE GOOD TO GO!”

- The “Good to Go” scheme is open to all tourism and hospitality businesses across the UK, who can opt in with a self-assessment online and be granted the certification
- It indicates that businesses are adhering to their respective government and public health guidelines, as well as sector-specific guidance
- The industry standard covers sectors including accommodation, visitor attractions, restaurants and pubs, business conference and events venues and tour and coach operators. It also requires that businesses are signed onto an alert system that will notify them of any changes in guidance
- The “We’re Good to Go” scheme is set to roll out as the sector in England begins to open up on July 4<sup>23</sup>

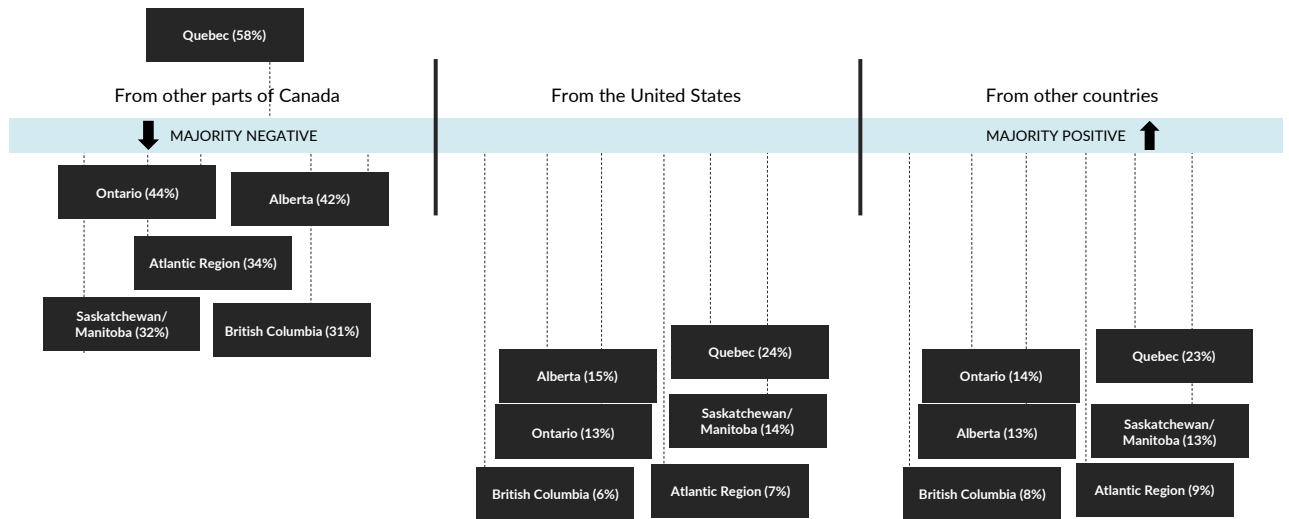
**KEY TAKEAWAY:** Destinations are using similar “We’re Good to Go!” schemes to address potential visitor health and safety concerns and re-build trust. The scheme also aims to reassure residents of the preparedness of the industry to host visitors.

## FOCUS CASE STUDY 2: YUKON, B.C. TRAVEL RESTRICTIONS TO BE LIFTED

- Yukon's government has announced the easing of some border controls and the reopening of parts of the economy starting on July 1
- The territory says that residents of B.C. and Yukon will be allowed to travel back and forth without the need to self-isolate for 14 days, however, B.C. residents entering Yukon must prove they are residents when they arrive at the airport or at the territorial boundary<sup>24</sup>

**KEY TAKEAWAY:** Provinces are identifying opportunities to travel across borders in “travel bubbles”. This can only happen if destinations are confident in their ability to respond to potential COVID-19 cases by having a robust process in place for controlling an outbreak. It is still to be observed how residents will react to tourists arriving through safe corridors as early anecdotes point to unpleasant experiences, but there is a general desire for people to begin travelling again and for businesses to host guests and make-up for some lost revenue.

## CANADIAN RESIDENT SENTIMENT TOWARD TOURISM FROM OTHER PARTS OF CANADA, THE U.S. AND OTHER COUNTRIES<sup>25</sup>



**KEY TAKEAWAY:** With the exception of Quebec attitudes towards visitors from other parts of Canada, resident sentiment across the board, whether towards visitors from other parts of Canada, the US, or other countries is negative. This suggests that residents are not yet ready to welcome visitors. Not only do destinations need to address a decrease in visitors and visitor spend, but added effort needs to be placed in building resident confidence in tourism as a driver of economic development.

## TRAVELLER BEHAVIOURS

- GLOBAL: Across a basket of countries, 26% of consumers feel safe flying right now; 34% feel safe staying in a hotel; and 21% are actively searching for travel deals<sup>26</sup>
- CANADA: Within Canada, 22% of consumers feel safe flying right now; 28% feel safe staying in a hotel; and 15% are actively searching for travel deals<sup>27</sup>

**KEY TAKEAWAY:** Early demand signals show that the across the globe travellers are still very cautious. In the Canadian market, though consumers are starting to feel more financially secure they are still anxious about health and safety. Attending in-person events is viewed as the most anxiety producing activity.

## AVIATION

In this section, we present the latest updates from the top airlines in Canada, the US and from key Canadian global source markets.

AIRLINE	KEY UPDATES
<b>CANADA</b>	
<b>Air Canada</b>	Air Canada is now flying to a select network of domestic, trans-border and international destinations. The airline has refunded more than \$1 billion in refundable tickets since the start of 2020 <sup>28</sup>
<b>West Jet</b>	From July 5 through August 4, WestJet will offer operations to 45 destinations including 39 in Canada, five in the US and one in Mexico <sup>29</sup>
<b>Air Transat</b>	Transat is set to resume both its flights and tour activities starting July 23. Its new flight schedule, running through October 31, will include 22 destinations in Europe, the South, the US and Canada <sup>30</sup>
<b>US</b>	
<b>United</b>	United plans to restore service to more than 150 destinations across the US and Canada this summer, resuming flights to popular business destinations <sup>31</sup>
<b>Southwest</b>	Southwest currently plans to resume flights to Mexico and the Caribbean July 1. The airline is continuing to monitor evolving conditions across 14 international destinations, pending government travel restrictions <sup>32</sup>
<b>Delta</b>	Delta plans to add 1,000 flights system-wide in July, adding increased nonstop connectivity between major air hubs like Atlanta, Detroit, Minneapolis and Salt Lake City and capacity for Florida and the West Coast <sup>33</sup>

<b>American</b>	American Airlines is gearing up for summer by restoring 55% of its domestic schedule and almost 20% of its international schedule in July 2020, as compared with last year <sup>34</sup>
<b>INTERNATIONAL</b>	
<b>Aeromexico</b>	Aeromexico plans to double its domestic capacity in July and quadruple its international capacity. Overall, over 6,000 flights are expected , however has just filed for bankruptcy protection*
<b>Air China</b>	In May, Air China carried 4.07 million passengers across its network, a 53% increase compared to April. This was still about 57% lower year-on-year <sup>36</sup>
<b>Air France-KLM</b>	KLM announced plans to boost its July route network and number of flights by 60% compared to the June schedule <sup>37</sup>
<b>Air India</b>	Air India will operate more flights to North America to bring home stranded citizens <sup>38</sup>
<b>Alitalia</b>	Alitalia will increase number of flights and destinations served in July. During the month, the airline will operate over 1,000 weekly flights reaching 13 new domestic and international airports <sup>39</sup>
<b>British Airways</b>	British Airways will expand domestic and international commercial passenger operations in July; 29 destinations will be serviced from London Heathrow <sup>40</sup>
<b>China Eastern</b>	In May China Eastern carried about 4.17 million passengers, a 56% month-on-month jump. Compared to May 2019, however, this represented a 62% drop in passenger numbers <sup>41</sup>
<b>China Southern</b>	In May, China Southern carried 5.87 million passengers for the month – a 52% month-on-month increase, but a 44% decline compared to 2019 <sup>42</sup>
<b>Emirates</b>	Emirates added flights to 29 destinations as of June 15 <sup>43</sup>
<b>Etihad</b>	Etihad is set to add 15 new cities to its flight schedule from July 16, meaning it will fly to 40 destinations across the globe. The airline will operate inbound and outbound flights to several new destinations across Europe, the Indian subcontinent and the Middle East <sup>44</sup>
<b>Lufthansa</b>	The Lufthansa Group will be serving 90% of their normal short and medium-haul destinations and about 70% of their normal long-haul destinations by the end of October <sup>45</sup>
<b>Japan Airlines</b>	Japan Airlines will fly 53% of its original domestic schedule from July 1-16. This is an increase from 46% in the second half of June <sup>46</sup>
<b>Korean Air</b>	No/insufficient information
<b>Qantas</b>	Qantas is wiping most international flights from its schedule until October with the sole exception will be some flights to New Zealand <sup>47</sup>
<b>Ryanair</b>	As of July 1, Ryanair will operate some 1,000 flights per day <sup>48</sup>

**KEY TAKEAWAY: Capacity has bounced back strongly. Within the sector there is optimism that demand will continue to grow over the summer months.**



## ACCOMMODATION & EVENTS

- GLOBAL: Among member companies of the Global Travel Business Association, 62% expect most (15%) or some (47%) of their employees will be willing to travel within the first six months after restrictions are lifted<sup>50</sup>
- GLOBAL: On June 13, the Chinese hotel market reached new gains at 52.6% occupancy. Improvements were also seen in the US (42.5%) and Middle East (36.8%), however, Europe's performance was much lower (24.1%)<sup>51</sup>
- CANADA: Canadian hotel performance was up slightly for the week ending June 20. In a year-over-year comparison, the industry reported a 66.1% drop in occupancy to 25.6%, a decrease in Average Daily Rate (ADR) to \$110.70 and a 79.3% decrease in Revenue Per Available Room (RevPAR) to \$28.33. British Columbia was the only province to reach a 30% occupancy level<sup>52</sup>

**KEY TAKEAWAY: Although hotel performance is slowly improving, the prevention and containment of new COVID-19 outbreaks will significantly affect progress.**

## CRUISE

- GLOBAL: Major cruise lines agreed to voluntarily extend a suspension of operations out of US ports until September 15<sup>53</sup>

**KEY TAKEAWAY: The US Centers for Disease Control and Prevention declared cruise travel an activity that could exacerbate the spread of COVID-19 globally. In response, the industry has committed to pausing operations once again to err on the side of caution.**

## MAJOR TOUR OPERATORS

- GLOBAL: Icelandic tour operators are wooing back pandemic travellers with free COVID-19 tests as a savvy response to the country's arrival screening program<sup>54</sup>
- CANADA: Air Canada Vacations (ACV) is offering special offers and savings with any Canada flight and hotel package, and tours. Transat Distribution Canada (TDC) has signed a preferred agreement with Canada travel specialist Fresh Tracks Canada<sup>55</sup>

**KEY TAKEAWAY: Keeping the door open for travellers, tour operators continue to offer flexible cancellation and re-booking policies in addition to enhanced health and safety measures.**

## SOURCES

- 1 <https://www.ontario.ca/page/reopening-ontario>
- 2 [https://cdn-contenu.quebec.ca/cdn-contenu/sante/documents/Problemes\\_de\\_sante/covid-19/Plan\\_deconfinement/Deconfinement\\_planning\\_pandemic\\_covid-19.pdf?1590430413](https://cdn-contenu.quebec.ca/cdn-contenu/sante/documents/Problemes_de_sante/covid-19/Plan_deconfinement/Deconfinement_planning_pandemic_covid-19.pdf?1590430413)
- 3 <https://www2.gov.bc.ca/gov/content/safety/emergency-preparedness-response-recovery/covid-19-provincial-support/bc-restart-plan>
- 4 <https://www.alberta.ca/alberta-relaunch-strategy.aspx>
- 5 <https://www.gov.mb.ca/covid19/restoring/future-phases.html>
- 6 <https://covid19.ca.gov/roadmap/#stage-1>
- 7 <https://gov.texas.gov/news/post/governor-abbott-announces-phase-iii-to-open-texas>
- 8 <https://www.flgov.com/wp-content/uploads/covid19/Taskforce%20Report.pdf>
- 9 <https://nymag.com/intelligencer/2020/06/when-will-new-york-reopen-phases-and-full-plan-explained.html>
- 10 <https://www.governor.pa.gov/plan-for-pennsylvania/>
- 11 <https://www.instituteforgovernment.org.uk/explainers/boris-johnson-plan-ease-coronavirus-lockdown>
- 12 <https://www.france24.com/en/20200602-france-lifts-more-covid-19-restrictions-what-you-need-to-know-for-phase-ii>
- 13 <https://covid19data.com/2020/06/29/india-sets-new-guidelines-for-second-phase-of-reopening-as-coronavirus-cases-soar/>
- 14 <https://www.garda.com/crisis24/news-alerts/341951/mexico-authorities-announce-three-phase-plan-to-ease-covid-19-lockdown-may-13-update-10>
- 15 [https://www.worldometers.info/coronavirus/?utm\\_campaign=CSauthorbio?](https://www.worldometers.info/coronavirus/?utm_campaign=CSauthorbio?)
- 16 <https://www.cbc.ca/player/play/1757730371971>
- 17 <https://ipac-canada.org/coronavirus-resources.php>
- 18 <https://www.cbc.ca/news/politics/travel-ban-extended-july-1.5632625>
- 19 <https://www.cbc.ca/news/business/img-downgrades-outlook-global-economy-1.5625010>
- 20 <https://www.ustravel.org/toolkit/covid-19-travel-industry-research>
- 21 <https://www.conferenceboard.ca/e-Library/abstract.aspx?did=10741>
- 22 <https://www.cbc.ca/news/business/oece-outlook-1.5605866>
- 23 <https://skift.com/2020/06/25/uk-tourism-sector-releases-good-to-go-campaign-to-spur-staycations/>
- 24 <https://globalnews.ca/news/7006015/yukon-bc-coronavirus-travel-restrictions/>
- 25 <https://www.destinationcanada.com/sites/default/files/archive/1069-Canadian%20Resident%20Sentiment%20-%20June%2023%2C%202020/Canadian%20Resident%20Sentiment%20-%20June%2023%2C%202020.pdf>
- 26 <https://www2.deloitte.com/uk/en/insights/industry/retail-distribution/consumer-behavior-trends-state-of-the-consumer-tracker.html#>
- 27 <https://www2.deloitte.com/uk/en/insights/industry/retail-distribution/consumer-behavior-trends-state-of-the-consumer-tracker.html#>
- 28 <https://www.travelweek.ca/news/air-canada-westjet-transat-sunwing-and-more-the-latest-updates-amid-the-coronavirus-pandemic/>
- 29 <https://www.travelweek.ca/news/air-canada-westjet-transat-sunwing-and-more-the-latest-updates-amid-the-coronavirus-pandemic/>
- 30 <https://www.travelweek.ca/news/air-canada-westjet-transat-sunwing-and-more-the-latest-updates-amid-the-coronavirus-pandemic/>
- 31 <https://www.foxnews.com/travel/which-us-airlines-are-resuming-service-in-july>
- 32 <https://www.foxnews.com/travel/which-us-airlines-are-resuming-service-in-july>
- 33 <https://www.foxnews.com/travel/which-us-airlines-are-resuming-service-in-july>
- 34 <https://www.foxnews.com/travel/which-us-airlines-are-resuming-service-in-july>
- 35 <https://simpleflying.com/aeromexico-100-million-bailout/>
- 36 <https://airlinegeeks.com/2020/06/30/lufthansa-group-announces-fall-schedule-extension/>
- 37 <https://www.forbes.com/sites/ramseyqubein/2020/06/03/klm-adds-60-more-flights-to-airlines-july-schedule-in-monthly-update/#30984f085bc2>
- 38 <https://timesofindia.indiatimes.com/business/india-business/air-india-to-operate-70-additional-flights-to-us-canada-from-june-11-30-hardeep-puri/articleshow/76140619.cms>
- 39 <https://www.traveldailymedia.com/alitalia-offerings-over-1000-weekly-flights-to-37-destinations-in-july/>
- 40 <https://airlinegeeks.com/2020/06/05/42063/>
- 41 <https://www.flightglobal.com/airlines/chinas-big-three-carriers-see-leap-in-may-passenger-numbers/138844.article>
- 42 <https://www.flightglobal.com/airlines/chinas-big-three-carriers-see-leap-in-may-passenger-numbers/138844.article>
- 43 <https://simpleflying.com/emirates-hong-kong-covid-flight/>

- 44 <https://www.thenational.ae/lifestyle/travel/etihad-to-resume-flights-to-15-destinations-from-mid-july-including-seven-cities-in-india-1.1041552>
- 45 <https://airlinegeeks.com/2020/06/30/lufthansa-group-announces-fall-schedule-extension/>
- 46 <https://simpleflying.com/japan-airlines-july-domestic-increase/>
- 47 <https://simpleflying.com/qantas-international-flight-suspension/>
- 48 <https://simpleflying.com/ryanair-return-changes/>
- 49 <https://simpleflying.com/qatar-airways-daily-canada-flights/>
- 50 COVID-19 Situational Analysis: Business Events, Updated June 15
- 51 <https://str.com/data-insights-blog/covid-19-webinar-summary-5-key-points-europe-hotel-performance-18-june>
- 52 <https://str.com/press-release/str-canada-hotel-results-week-ending-20-june>
- 53 <https://www.cnbc.com/2020/06/19/cruise-lines-voluntarily-suspend-all-trips-out-of-us-ports-until-sept-15-trade-group-says.html>
- 54 <https://www.traveldailynews.com/post/tour-companies-in-iceland-pay-for-tourists-covid-19-test>
- 55 <https://www.travelweek.ca/news/new-timetotravel-map-updates-safe-travel-within-canada-acv-tdc-launch-new-product/>
- \* <https://www.cnbc.com/2020/07/01/aeromexico-becomes-latest-latin-american-airline-to-file-for-bankruptcy.html>