

STATE OF TOURISM IN CANADA DURING COVID-19

DASHBOARD 2.0 – SEPTEMBER 2020

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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

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KEY INSIGHTS

TWENTY31 INTERPRETATION OF FINDINGS

- **GLOBAL:** While many travel and tourism industry players are in various stages of recovery from the effects of the pandemic over the past few months, most businesses are performing well below 2019 levels and don't expect to get back to those levels until 2023 or 2024. Additionally, many players are bracing for a possible second wave of the virus in the fall that would deal another blow to an industry. Authorities may need to continue restrictions and border controls within and between countries.
- **GLOBAL:** Despite a gloomy outlook for the fall and winter seasons, there are some bright spots with travel and tourism organizations finding creative and innovative ways to repurpose their business, using the lull in tourism activity to revamp and renovate, and generally re-imagine what a sustainable or "regenerative" future for tourism may entail.
- **CANADA:** with Canada recognized globally as a leader in managing the spread of COVID-19, federal and local governments along with travel and tourism industry stakeholders the tourism industry are working to strike a balance between protection from the virus and the need to support the livelihoods of so many that are dependent on tourism. Many tour operators remain closed and hotels are still experiencing below 50% occupancy.
- **CANADA:** To recapture momentum, Canada will need to reassess travel restrictions and protocols to ensure that recovery is not overly cautious but aligned with evidence, risks and new technology and tools that can help prevent and manage outbreaks.



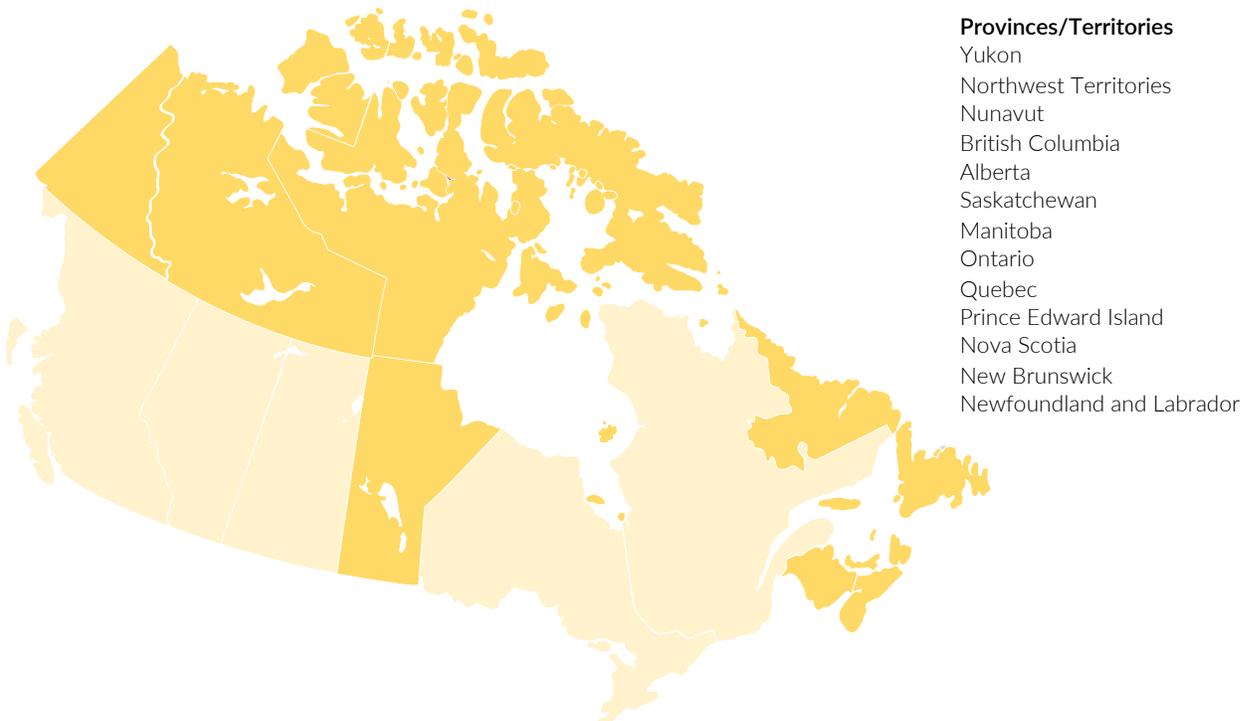
GLOBAL EASING OF TRAVEL RESTRICTIONS (HEAT MAPS)

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 - 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



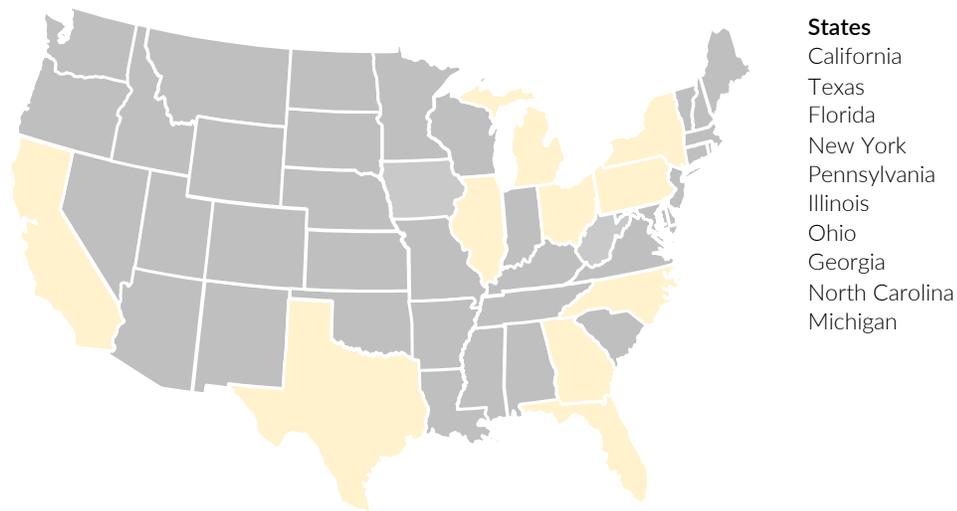
PROVINCE	TWENTY31 PHASE	CURRENT COUNTRY PHASE	COMMENTS
Ontario ¹	Phase 3	<p>STAGE 1 (May 19): Opening businesses that can immediately meet or modify operations to meet public health advice and workplace safety measures.</p> <p>STAGE 2 (June 12): Taking a regional approach to opening more businesses and services, community, recreational and outdoor spaces, while emphasizing public health advice and personal responsibility.</p> <p>STAGE 3 (July 17): Reopening most businesses and public spaces except for high-risk places and activities where crowds congregate, and social distancing is difficult. Public gatherings will continue to be restricted to 50 indoors and 100 outdoors.</p>	Ontario is currently in its Stage 3 of reopening.
Quebec ²	Phase 3	<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. Tourism businesses and establishments and festival and event promoters are authorized to resume their activities subject to compliance guidelines</p>	Quebec is in its final stage of deconfinement.
British Columbia ³	Phase 3	<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, a 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 on vaccine): International tourism, a restart of large gatherings including concerts and conferences</p>	British Columbia is currently in its phase 3 of reopening.

Alberta ⁴	Phase 3	<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>	Alberta is currently in stage 2 of reopening.
Manitoba ⁵	Phase 2	<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, brewpubs, 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, brewpubs, microbreweries, and distilleries; reopening permanent outdoor amusement parks.</p> <p>PHASE 4 (July 25): Phase 3 public health guidance continues to be in effect, including 14-day self-isolation requirements for those traveling into Manitoba from eastern and southern Ontario, Quebec, and Atlantic Canada.</p>	Manitoba is currently in phase 4 of reopening.

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 ⁶	Phase 3	California unveiled a new “Blueprint for a Safer Economy” that replaces the state’s coronavirus watch list and the previous Stage 1-4 approach to reopening. It assigns one of four color-coded risk levels to each county, ranging from “minimal” (yellow) to “widespread” (purple), determining which businesses can and cannot open.	A majority of the state falls into the “widespread” or purple risk status, meaning most non-essential indoor businesses will remain closed.
Texas ⁷	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. Many travel-related activities are open in some capacity including hotels, restaurants, and state parks but bars are closed. Mandatory face coverings.</p>	Texas is currently in its Phase 3.

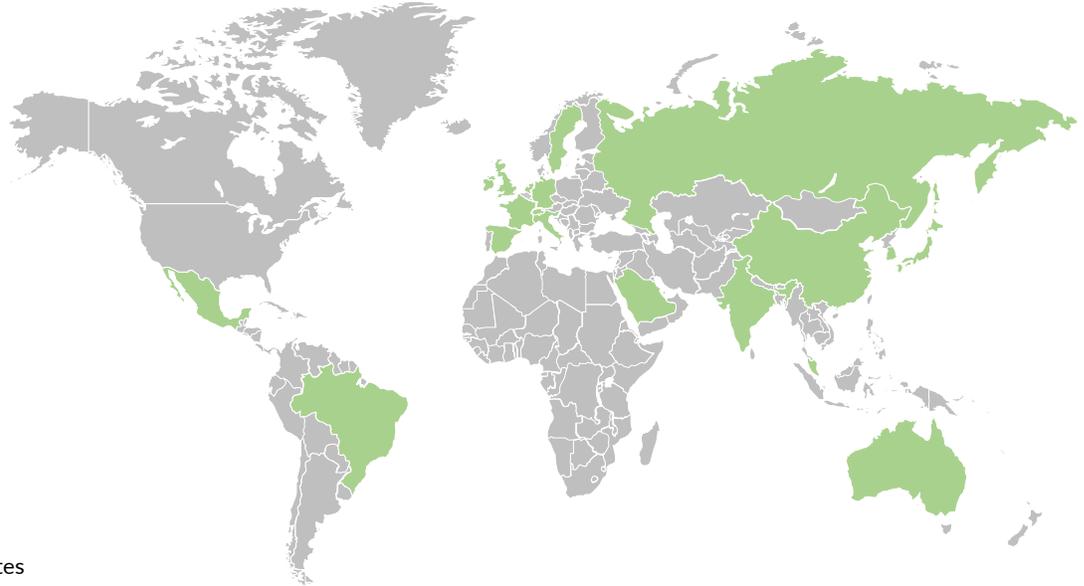
Florida⁸	Phase 3	<p>PHASE 0: Individuals are urged to avoid all non-essential travel and cruises, including to U.S. states and cities outside of Florida with community spread of COVID-19.</p> <p>PHASE 1 (May 1): Individuals should avoid all non-essential travel and cruises, including U.S. states and cities outside of Florida with substantial community spread of COVID-19.</p> <p>PHASE 2 (June 5): Individuals may resume non-essential travel. Travellers from areas with substantial community spread of the virus, including the New York, New Jersey, and Connecticut tri-state area, are required to quarantine for 14 days or the duration of their visit if shorter.</p> <p>PHASE 3: Employees should resume non-essential travel and adhere to CDC guidelines regarding isolation following travel.</p>	Florida is in Phase 2, with exceptions for three high-risk counties.
New York⁹	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% 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% capacity.</p> <p>PHASE 4: Allows schools, and low-risk arts, entertainment, recreation, shopping malls, and gyms to reopen — all with social distancing required. Gatherings of up to 50 people will also be allowed.</p>	Most of New York is in the fourth phase of reopening.
Pennsylvania¹⁰	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 (revised August 27): Indoor gatherings of more than 25 prohibited; Outdoor gatherings of more than 250 prohibited; Masks are required; Restaurants and bars open at 25% capacity for indoor dining; Indoor recreation and health and wellness facilities (such as gyms and spas) open at 50% occupancy; All entertainment (such as casinos, theaters, and shopping malls) open at 50% occupancy.</p>	Pennsylvania is currently in its green phase of reopening.

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 ¹¹	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> <p>'NEXT CHAPTER': As of August 1, government guidance no longer encouraged people to work from home, and employers were given more discretion about whether to re-open their workplaces.</p>	Currently in its 'next chapter' plan to rebuild.

France ¹²	Phase 4	<p>PHASE 1 (May 11): Small shops and markets can open with restrictions on the number 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. Face masks are mandatory across Paris and several surrounding areas</p>	Currently in its final phase of reopening.
India ¹³	Phase 4	<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> <p>PHASE 3 (July 29): Gyms and yoga centres are allowed to function, the night curfew order is revoked</p> <p>PHASE 4 (September 1): Resumption of metro rail services</p>	Currently in its phase 4 of reopening.
Mexico ¹⁴	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 the readiness of states to reopen, by using the following color-coded system:</p> <ul style="list-style-type: none"> • Red: Only essential economic activities will be allowed, and people will also be allowed to go out for a walk around their homes during the day • Orange: In addition to essential economic activities, companies in non-essential economic activities will be allowed to work with 30% of the staff for their operation, always taking into account the maximum care measures for people with a greater risk of presenting a serious illness • Yellow: All work activities are allowed, taking care of people with the highest risk of presenting a serious picture of COVID-19. Open public space opens regularly, and closed public spaces can be opened with reduced capacity • Green: All restrictions will be lifted, and schools may reopen, although sanitary measures must be adhered to 	Currently in its final phase 3. The majority of states are in the orange or yellow code.

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

OVERVIEW

HEALTH IMPACT

- GLOBAL: Confirmed deaths caused by COVID-19 surpassed 840,000 globally, while worldwide cases climbed above 25.4 million¹⁵
- GLOBAL: World Health Organization director, Tedros Adhanom Ghebreyesus, made clear that much of the virus resurgence, as societies open up, is occurring in clusters of cases related to gatherings of people, including at stadiums, nightclubs, places of worship, and crowds. He encouraged countries and community to hold event safely, with a risk-based approach that takes the measures necessary to keep people safe¹⁶
- CANADA: As of August 27, there have been a total of 126,848 confirmed cases and 9,102 reported deaths in Canada¹⁷
- CANADA: Canada extended international travel restrictions and mandatory 14-day quarantines until September 30¹⁸

KEY TAKEAWAY: Canada's borders will remain closed for at least another month; however, some tourism stakeholders are now questioning whether restrictive approaches are still necessary and appropriate or whether testing on arrival or other technology based solutions can help to speed up border openings.

ECONOMIC IMPACT

- GLOBAL: In "COVID-19 and Transforming Tourism," the UNWTO forecasts international tourist numbers will decline by between 58% and 78% from 2019 to 2020. This translates into a drop in visitor spending from \$1.5 trillion in 2019 to between \$310 and \$570 billion in 2020¹⁹
- GLOBAL: The International Air Transportation Association is forecasting the worst financial performance in the history of commercial aviation, predicting a global loss of \$84 billion²⁰
- CANADA: The Bloomberg Nanos Canadian Confidence Index indicated a pick-up in sentiment in three of the four subcomponents of the index last week: personal finances, job security, and real estate. About 29% of respondents said their finances have worsened over the past year, versus 42% at the height of the pandemic and just shy of the 27% recorded in the weeks before shutdowns took place²¹
- CANADA: Real gross domestic product (GDP) fell 11.5% in the second quarter, following a 2.1% decline in the first quarter. The impacts of shutdowns of non-essential businesses, restrictions of travel and tourism, and border closures were exacerbated by sharp quarterly declines in major trading partners' economies, such as the United States (-9.1%), the United Kingdom (-20.4%), France (-13.8%), Italy (-12.4%) and Japan (-7.8%)²²

KEY TAKEAWAY: Canadian's are starting to feel more confident about their finances. The UNWTO expects major drops in global visitor spending by the end of 2020.

FOCUS CASE STUDY 1: HAS THE BUBBLE BURST?²³

- As the idea of the travel bubble garnered attention, destinations around the world entered into partnerships and alliances to ensure access for international markets and help rebuild their economies
- Virus outbreaks, quarantine restrictions and borders shutting on short notice have all proven to be a challenge for travellers and the many countries involved in these arrangements
- Tourism dependent Thailand has kept their borders closed, instead focussing on crushing COVID-19 within the country. They are now preparing for international tourism by launching a program called "Safe and Sealed", which focuses on long-stays visitors that would be designated to certain areas in the country and are willing to undergo two COVID-19 tests

KEY TAKEAWAY: As we have learned since June when international borders first started opening in Europe, there is no silver bullet for managing the virus, coordinating approaches, and communicating travel guidelines for travellers. Travel bubbles have proven to be a challenge for governments and public health officials and can be confusing for potential travellers. New approaches will continue to pop up but ensuring travellers minimize their own risk and that of others is paramount.

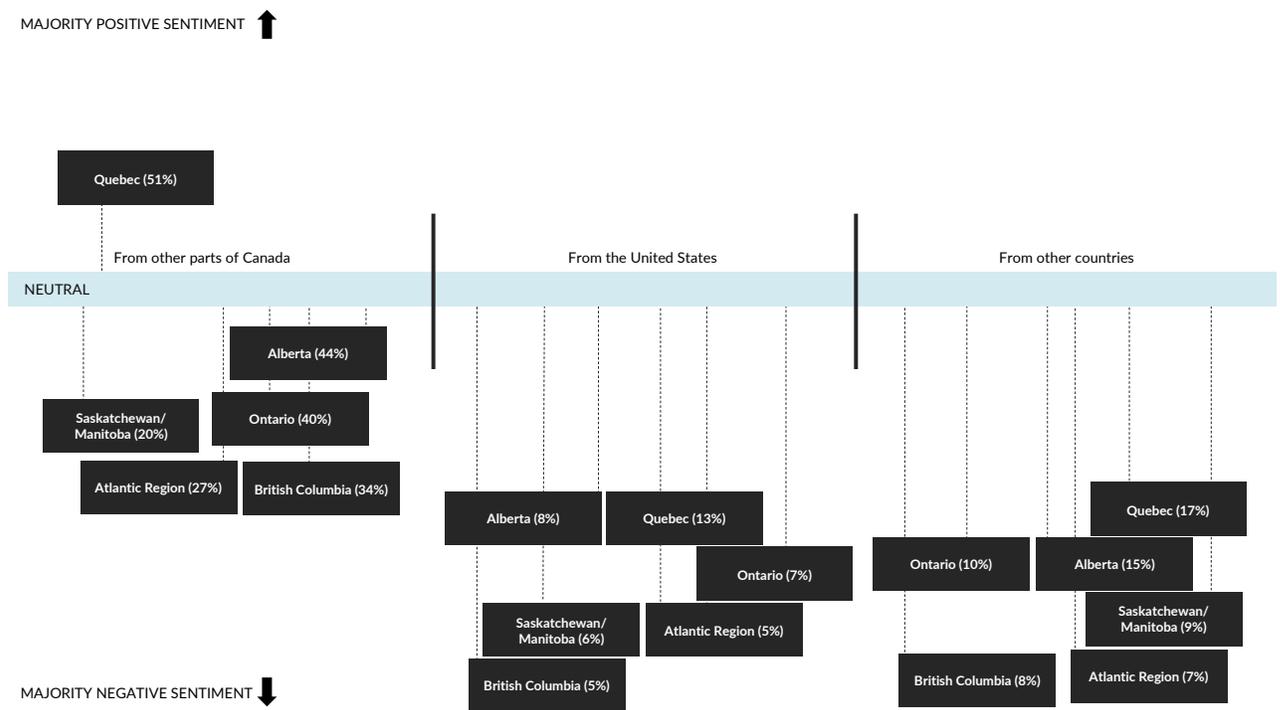
FOCUS CASE STUDY 2: REGENERATIVE TRAVEL THE NEW BUZZ?²⁴

- Before the COVID-19 pandemic began, sustainable tourism was gaining momentum as destinations looked for ways to deal with and prevent the negative impacts of tourism such as overcrowding, environmental damage and tourism leakage
- Today, more tourism industry leaders have joined together to make sustainable tourism to a whole new level in what some are calling 'regenerative tourism'. Regenerative tourism is built around the concept of 'leaving a place better than you found it'
- Regenerative tourism relies on the local community to decide what makes a place better. Operators and travellers play a key role by giving back more than they take and making more conscious spending decisions that benefit locals first

KEY TAKEAWAY: The pandemic has thrust both the positives and negatives of tourism into the spotlight. Regenerative tourism has the potential to create new forums and processes for involving local communities in planning and development in more meaningful and ongoing ways. Many tourism stakeholders are hopeful that the measurement of tourism success can also be redefined with the input of locals, which will help to build stronger relationships over the long-term.

CANADIAN RESIDENT SENTIMENT TOWARD TOURISM FROM OTHER PARTS OF CANADA, THE U.S. AND OTHER COUNTRIES²⁵

In this section, we cover Canadian resident sentiment towards travellers from other provinces, the US and other countries. The graph is not to scale – it is indicative of the relative positioning of Canadian provinces vis-à-vis other provinces. Anything above the pink line indicates positive sentiment; anything below is negative.



KEY TAKEAWAY: Except for Saskatchewan/Manitoba, resident confidence in opening up communities to visitors from other parts of Canada has slightly improved since the end of July. It will be important for destinations and businesses to navigate their new community responsibilities and accountabilities. The way residents feel will continue to be an important consideration as plans and next steps are made.

TRAVELLER BEHAVIOURS

- GLOBAL: A recent G Adventures panel survey looking at travel trends post-pandemic has indicated that 32% of travellers across the UK and Ireland intend to take their next trip with multiple friends and/or family members²⁶
- CANADA: Within Canada, 18% of consumers feel safe flying right now; 33% feel safe staying in a hotel, and 14% are actively searching for travel deals²⁷

KEY TAKEAWAY: More Canadians are reporting that they feel safe staying in a hotel, indicating that the introduction of health and safety protocols and communications combined with decreasing virus transmission levels has helped to boost confidence but these numbers remain low and when compared to other countries, Canadian traveller confidence is among the lowest of all countries studied (Deloitte) seriously impeding the potential to recover tourism even from the domestic market.

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
CANADA	
Air Canada	Air Canada is now flying to a select network of domestic, transborder, and international destinations. The airline was scheduled to fly to 91 destinations within Canada and around the world over the summer ²⁸
West Jet	From July 15 through September 4, WestJet will offer operations to 48 destinations including 39 in Canada, five in the US, two in Europe, one in the Caribbean, one in Mexico. ²⁹ A zero-tolerance mask policy, requiring all guests over the age of two to wear a mask or possibly face a one-year travel ban was introduced September 1 ³⁰
Air Transat	Air Transat, Canada's largest leisure carrier, has officially released its plans to reinstate more flights for the winter season. The new schedule will consist of over 40 destinations from its main hub in Montreal and Toronto and Quebec City ³¹
US	
United	United Airlines has implemented a sophisticated algorithm that will cancel flights within seven days of departure when load factors fall below a certain threshold ³²
Southwest	Southwest has seen an uptick in bookings for August travel after a plateau in July, but it does not anticipate the increased bookings to continue into the fall. After flying roughly 73% of what it flew a year ago in August, the airline forecasts flying around just 60% in September and as little as half in October ³³
Delta	Delta Air Lines plans to add more trans-Atlantic and trans-Pacific flights to top business and leisure destinations for the winter 2020-2021 and summer 2021 seasons ³⁴

American	American Airlines will slash its flying capacity by 55% in October and operate at 45% of its October schedule compared to last year. They are adding more than 20 seasonal routes for customers seeking to travel to warmer climates as fall comes, including Miami, Phoenix, and Mexico ³⁵
INTERNATIONAL	
Aeromexico	After filing for bankruptcy protection in the US, the airline secured \$1 billion in debtor-in-possession financing ³⁶
Air China	No/insufficient information
Air France-KLM	Air France-KLM plans to operate at 45% of its 2019 capacity (in available seat kilometers) in Q3 2020 and 65% in Q4 2020. In 2021 a maximum of 80% is planned, and AF-KL does not expect pre-crisis levels of global demand for "several years" ³⁷
Air India	In total, 145 flights will operate between September 1st and October 24th from India to the US, as part of India's repatriation operation ³⁸
Alitalia	Alitalia will operate more flights to foreign destinations in September and October when the medium and long-haul international sector will grow by 7% in September and 29% in October, compared to August ³⁹
British Airways	British Airways has launched its annual September Sale with deals to over 150 destinations across its global network ⁴⁰
China Eastern	China Eastern Airlines Group and China State Railway Group have introduced a new train-plane ticketing product on their applications. This joint venture creates a one-stop experience for passengers, booking train, and plane tickets simultaneously ⁴¹
China Southern	China Southern launched a Fly Happily promotion which allows customers to fly to any destination across the country, before January 6, for \$529 ⁴²
Emirates	Emirates has added more destinations in Africa and Asia. It is eyeing serving 100% of its pre-crisis network by next summer ⁴³
Etihad	By September, the airline aims to increase our worldwide flights to half their pre-COVID-19 capacity ⁴⁴
Lufthansa	Under the bilateral agreement between the governments of India and Germany, Lufthansa has announced that it will recommence services from Frankfurt to Mumbai, Delhi, and Bengaluru from August 13 ⁴⁵
Japan Airlines	Japan Airlines will increase its flights to Singapore and restart flights to Sydney in September. The airline says flights to Sydney will operate with a maximum of 30 passengers per flight only due to quarantine restrictions in Australia ⁴⁶
Korean Air	Korean Air will connect customers on Delta's current flights from Atlanta, Detroit, and Seattle to over 70 destinations throughout Asia ⁴⁷
Qantas	Qantas believes its international flights will be grounded until at least mid-2021 and it will take years for the activity to return to what it was before ⁴⁸
Ryanair	Ryanair is canceling almost one in five flights scheduled for September and October owing to a drop in bookings ⁴⁹
Qatar	Qatar plans to expand its network to expand its global network to more than 85 destinations ⁵⁰

KEY TAKEAWAY: As summer travel concludes, airlines have a clearer picture of their profitability. Capacity levels will continue to be adjusted and will impact how fast or slow recovery may be.

ACCOMMODATION & EVENTS

- GLOBAL: The corporate travel sector faces “bleak” autumn and winter with most businesses not looking to restart travel until the end of the year⁵¹
- GLOBAL: Full recovery in US hotel demand and room revenue remains unlikely until 2023 and 2024, respectively, according to the slightly downgraded STR and Tourism Economics⁵²
- CANADA: Canadian hotel performance has shown improvement for the week ending August 22. In a year-over-year comparison, the industry reported a 46.4% drop in occupancy to 42.9%, a decrease in ADR to \$130.37, and a 61% decrease in RevPAR to \$55.97. British Columbia and Manitoba reached above a 40% occupancy level⁵³

KEY TAKEAWAY: With corporate and group travel still restricted in many destinations, the hotel sector’s recovery is relying mainly on leisure travel demand.

CRUISE

- Costa Cruises has become the first cruise line to earn the Biosafety Trust Certification from RINA, the testing, inspection, certification, and ship classification company. When the cruise line restarts operations from September 6 out of Trieste, Italy all embarking guests will undergo an antigen COVID-19 swab test⁵⁴

KEY TAKEAWAY: With cruises now operating in Europe, COVID-19 protocols are being tested and indicating their effectiveness, as well as global case studies for learning.

MAJOR TOUR OPERATORS

- GLOBAL: In a recent United States Tour Operators Association (USTOA) survey of active members, more than a third (38%) have seen an increase in bookings in the last 60 days and eight out of ten (79%) of these members reported that bookings were for the third quarter of 2021
- GLOBAL: Monograms announced plans to expand its all-in-one vacation packages to new seasons and cities in 2021. The company is promoting hand-selected accommodations and customizable sightseeing—in the “off-season” with savings of up to 40%⁵⁶

KEY TAKEAWAY: Tour bookings from the US are increasing and the majority of trips are being planned for the summer 2021. Tour operators are focussed on exploring new products and experiences and building demand by promoting travel outside of the summer months.

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
- 3 <https://www2.gov.bc.ca/gov/content/safety/emergency-preparedness-response-recovery/covid-19-provincial-support/bc-restart-plan>
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