

STATE OF TOURISM IN CANADA DURING COVID-19

DASHBOARD 2.0 – OCTOBER 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: The travel and tourism industry continues to be one of the hardest hit. According to the UNWTO, between January and June, export revenue losses from international tourism were US\$460 billion. To make it through the rest of the pandemic, businesses will likely be reliant on government support and new methods of reopening and safety.
- GLOBAL: Traveller perceptions of safety will help determine confidence in travel and the speed at which recovery happens within countries, regions, and internationally. At the current state, Europeans are most optimistic about international travel. The majority of Canadians still feel safest about travelling closer to home or within their province.
- CANADA: Outdoor destinations and experiences still rank high for travellers. With the right combination of protocols and offerings, Canadian tourism businesses may be able to capture more of this demand over the winter months.
- CANADA: Although Canada has claimed international recognition for its virus management approach, the current restrictions on international travel are devastating to Canada's tourism economy.



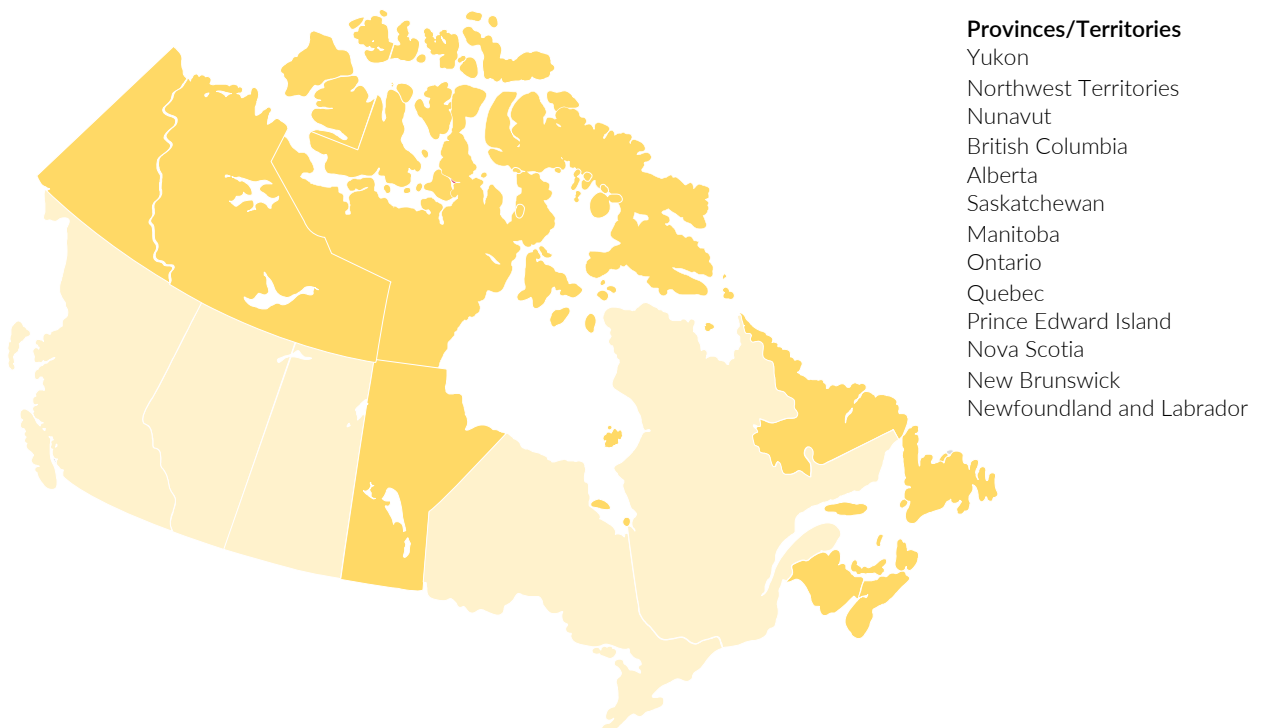
GLOBAL EASING OF TRAVEL RESTRICTIONS (HEAT MAPS)

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



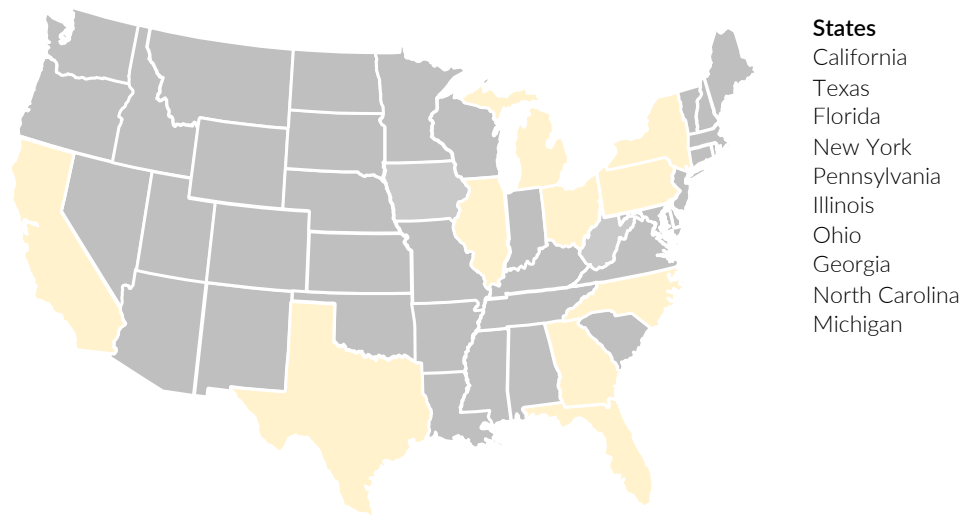
PROVINCE	TWENTY31 PHASE	CURRENT COUNTRY PHASE	COMMENTS
Ontario ¹	Phase 3	<p>STAGE 1 (May 19): Opening businesses that can immediately meet or modify operations to meet public health advice and workplace safety measures.</p> <p>STAGE 2 (June 12): Taking a regional approach to opening more businesses and services, community, recreational and outdoor spaces, while emphasizing public health advice and personal responsibility.</p> <p>STAGE 3 (revised September 25): Reopening most businesses and public spaces except for high-risk places and activities where crowds congregate, and social distancing is difficult. Public gatherings are now restricted to 10 indoors and 25 outdoors. Bars, restaurants, and nightclubs, and other food establishments must prohibit the sale and consumption of alcohol by 11 pm and close by midnight.</p>	Ontario is currently in its Stage 3 of reopening.
Quebec ²	Phase 3	<p>VIGILANCE (GREEN). Basic measures: Activities maintained in compliance with provincial health rules.</p> <p>EARLY WARNING (YELLOW). Strengthened basic measures: Activities maintained in compliance with health rules, but with added enforcement, such as increased fines. Required when there's an increase in transmission.</p> <p>MODERATE ALERT (ORANGE). Intermediate measures: New measures that target specific sectors and activities where the risk of transmission is deemed higher.</p> <p>MAXIMUM ALERT (RED). Maximum measures: Includes targeted additional and more restrictive measures that could extend to prohibiting non-essential activities while avoiding province-wide confinement.</p>	Quebec unveiled a new colour-coded regional alert system to manage risk. Yellow regions include Quebec City, Eastern Townships, Outaouais, and Laval. Other regions, including Montreal, are in green.
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. Bars, pubs, restaurants, nightclubs, and stand-alone banquet halls have been ordered to stop selling liquor every night at 10 pm and to close by 11 pm.</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. Occupancy limits have been removed for retail/food and drink establishments.</p>	Manitoba is currently in phase 4 of reopening.
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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 remains in the “widespread” or purple risk status, meaning most non-essential indoor businesses will stay 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 (revised September 17): Most businesses in Texas will be able to operate at up to 75% capacity, but bars are closed. Mandatory face coverings.</p>	Texas is in Phase 3.

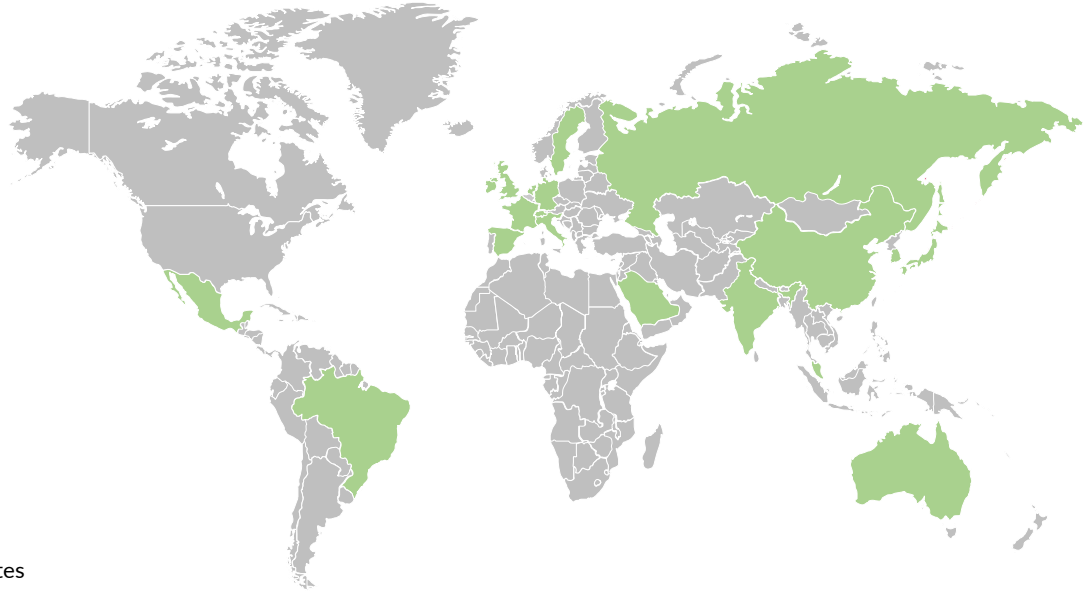
Florida⁸	Phase 3	<p>PHASE 0: Individuals are urged to avoid all non-essential travel and cruises, including to U.S. states and cities outside of Florida with community spread of COVID-19.</p> <p>PHASE 1 (May 1): Individuals should avoid all non-essential travel and cruises, including U.S. states and 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 (September 25): Employees should resume non-essential travel and adhere to CDC guidelines regarding isolation following travel. Bars, pubs, and nightclubs, and restaurants will have no restrictions.</p>	Florida is in Phase 3
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>	All regions of New York are in Phase 4 of reopening, with continued restrictions on bars and restaurants
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 September 15): Indoor gatherings of more than 25 prohibited; Outdoor gatherings of more than 250 prohibited; Masks are required; Restaurants and bars open at 50% capacity for indoor dining upon certification; 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' (revised September 24): Government guidance no longer encouraged people to work from home, and employers were given more discretion about whether to re-open their workplaces. Hospitality businesses, such as pubs and restaurants, must provide table service only, and close by 10 pm.</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</p> <p>PHASE 2 (June 2): Reopening of cafés and restaurants in so-called green zones, where the virus is least actively circulating.</p> <p>PHASE 3 (revised September 24): 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. The closure of all bars and restaurants were announced in Marseille, and shorter opening hours for Paris and other cities.</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.</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.</p> <p>PHASE 3 (July 29): Gyms and yoga centres are allowed to function, the night curfew order is revoked</p> <p>PHASE 4 (revised September 21): Resumption of metro rail services. Gatherings of up to 100 people will be permitted at sports, entertainment, cultural, religious, and political events outside of hot-spot areas, with mandatory face-mask wearing and social distancing measures</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 1 million globally, while worldwide cases climbed above 33.7 million¹⁵
- GLOBAL: The World Health Organization launched an initiative called “Verified” to fight virus misinformation. They will work with media partners, individuals, influencers, and social media platforms to spread content that promotes science, offers solutions, and inspires solidarity. This initiative is viewed as especially critical for building public confidence in the safety and efficacy of future COVID-19 vaccines¹⁶
- CANADA: As of September 23, there have been a total of 147,753 confirmed cases and 9,243 reported deaths in Canada¹⁷
- CANADA: Trudeau has warned Canada is “on the brink of a fall that could be much worse than the spring,” when the country went into a nationwide lockdown¹⁸

KEY TAKEAWAY: Global COVID-19 cases are rising once again and there is fear that a second wave could thrust tourism businesses back into lockdown.

ECONOMIC IMPACT

- GLOBAL: According to UNWTO, the massive drop in international travel demand over the period January-June 2020 translates into a loss of 440 million international arrivals and about US\$460 billion in export revenues from international tourism¹⁹
- GLOBAL: In the US for the week ending September 12, travel spending tallied just US\$12.7 billion, reflecting a 43% drop below last year’s levels (a US\$9.4 billion loss)²⁰
- CANADA: As dining rooms and patios continued to re-open in early summer, sales at full-service restaurants increased by more than one-third in July (+36.2%) compared with June. Likewise, with many bars, pubs, and some nightclubs re-opening in July, sales reported by drinking places also rose substantially (+40.8%). However, when compared with July 2019, unadjusted sales across the entire sector were down by one-quarter (-24.5%)²¹
- CANADA: As tourism activities remained in the doldrums, prices for air transportation (down 16%) and traveller accommodations (down 25%) further dropped in August²²

KEY TAKEAWAY: Although summer re-openings resulted in some positive gains for Canadian restaurants, bars, pubs, and some nightclubs, the travel and tourism industry as a whole is suffering. The UNWTO has confirmed massive losses in travellers and revenue since January.

FOCUS CASE STUDY 1: FRANCE'S NUANCED APPROACH²³

- There are currently no restrictions for travel to metropolitan France from Europe plus several other countries including Australia, Canada, Georgia, Japan, New Zealand, Rwanda, South Korea, Thailand, Tunisia, and Uruguay.
- Travellers from other countries are encouraged to have a negative PCR test before they arrive in France. Those without are presented with info upon arrival for carrying out two-week quarantine at a location of their choice, or in special accommodation.
- Since August, Charles de Gaulle airport in Paris has been trialing COVID-19 swab tests on arrival, taking passenger information and contact details. These tests were recently made mandatory for 16 'red list' countries with high levels of infection. If a test comes back positive, all passengers on the flight in question are then contacted by regional health authorities and asked to take a second test, as well as provided with details for a period of mandatory quarantine.

KEY TAKEAWAY: Based on international best practice, destinations like Canada ought to consider adopting proven practices from other jurisdictions to re-start international travel responsibly and safely. Some best practices include: not treating all arriving passengers the same, testing on arrival, encouraging travellers to check their disease status before they travel, leveraging technology to improve contact tracing, and mitigating the potential costs of visitors falling ill with COVID-19 through health insurance coverage for all those arriving in Canada.

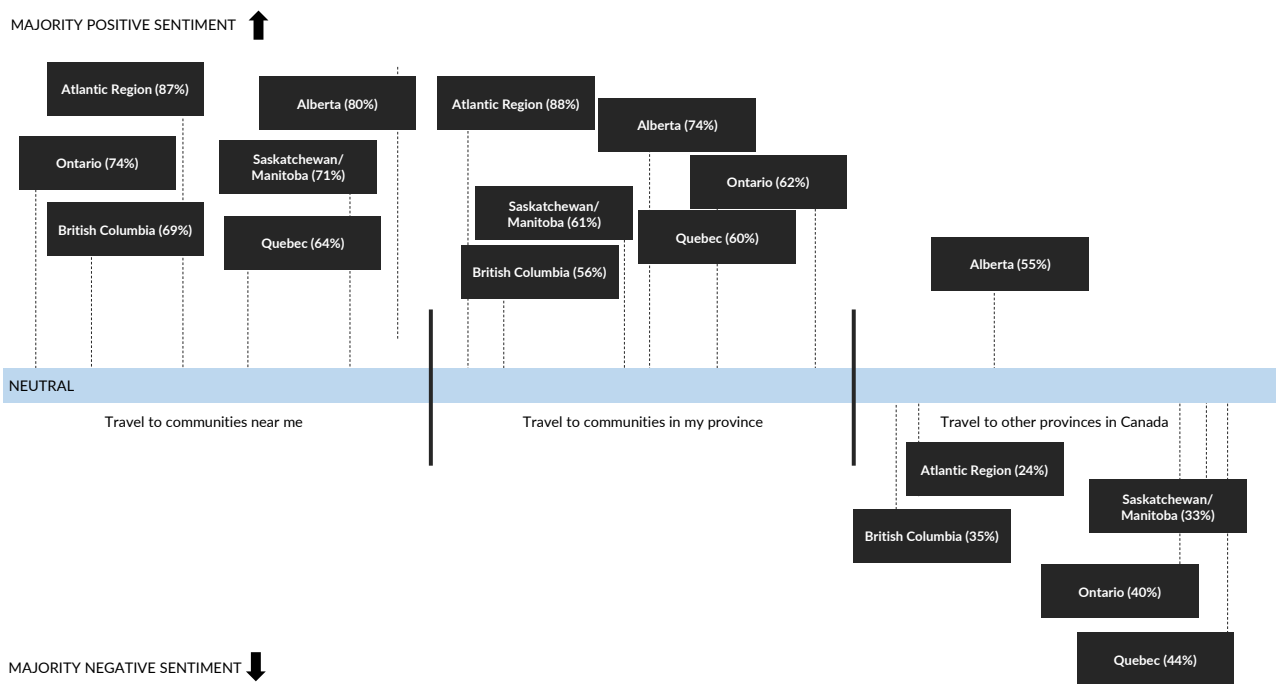
FOCUS CASE STUDY 2: HELSINKI DOGS SNIFFING OUT COVID-19?²⁴

- Helsinki's international airport, located in Vantaa, is taking a seemingly unconventional approach to detecting COVID-19. Authorities are employing trained 'COVID-19 sniffing dogs' to check travellers after they collect their luggage.
- The approach is low in cost compared to laboratory-based testing methods and according to preliminary studies, it is said to have nearly 100% accuracy in detecting the virus before symptoms even appear.
- The program will be piloted for four months, and if results are positive, it may be used in other places such as hospitals, care homes, and sporting and cultural events.

KEY TAKEAWAY: Countries around the world are searching high and low for new methods to detect COVID-19, and in countries such as Finland, dog sniffing can now be added to the list. For the travel and tourism industry, faster, cheaper, and more effective testing approaches can help to rebuild consumer confidence and perceptions of travel safety. Authorities are willing to pioneer new ways to support recovery.

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: Resident sentiment has significantly shifted from a month ago. There has been a positive move in sentiment towards travel to nearby communities and within the province. Aside from residents in Alberta, Canadian travellers mostly feel comfortable staying with their province.

TRAVELLER BEHAVIOURS

- **GLOBAL:** 24% of Europeans believe it is safe to travel internationally now, compared to 21% of travellers in the Americas and just 10% in Asia-Pacific. Search patterns for domestic, regional, and international flights reflect this sentiment and point towards a multispeed recovery, tied to the global economy and driven by low-cost carriers ²⁶
- **CANADA:** According to a survey of travel advisors in the US and Canada, the most popular destination inquiries shows travelers are seeking out sunshine and the great outdoors for domestic trips. The most inquired about US destinations are Alaska, Florida, California, Hawaii, Las Vegas, and Colorado, while the top Canadian destinations are Vancouver, British Columbia, and the Canadian Rockies ²⁷

KEY TAKEAWAY: Currently, European travellers are the most confident about international travel, and low-cost carriers may play a significant role in their route back to travel. As expected, and a positive for Canada, outdoor destinations remain bright spots and top of mind for potential travellers.

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 just launched an unlimited travel pass for Canadian residents. The pass is being sold in one, two or three-month increments, with pricing starting at \$2,260 per month ²⁸
West Jet	WestJet's low-cost subsidiary Swoop announced it is restarting operations on October 25 at Toronto Pearson and Kelowna international airports and is advertising non-stop service to places such as Cancun, Montego Bay, Orlando, Tampa Bay, and Las Vegas ²⁹
Air Transat	Air Transat has announced an ambitious winter flight schedule to 40 southern holiday destinations. ³⁰ Eligible customers who book a round trip flight from Canada to an international Air Transat destination or a Transat package to Mexico, Central or South America, or the Caribbean will now be eligible for COVID-19 insurance ³¹
US	
United	United Airlines will continue to gradually add capacity in the coming months, as it plans to resume service on nearly 50 domestic and 23 international routes. The air carrier said it expects to fly 40% of its full schedule in October ³²
Southwest	Southwest is sticking with capacity cuts of about 40%-45% from a year ago ³³
Delta	Delta Air Lines has joined other airlines by adding five new routes to western US cities that are 'outdoor destinations'. Systemwide, Delta will fly just 43% of what it flew during the month a year ago ³⁴

American	American Airlines has cut 83,000 domestic flights from its October schedule during the last two weeks, even as it holds on to hope that another round of federal stimulus grants could save jobs and service to some cities ³⁵
INTERNATIONAL	
Aeromexico	The month of October will see Aeroméxico operate about 30% more international flights compared to September. With this increase in its operations, the carrier will be operating to 28 destinations in the United States, Canada, Central and South America, the Caribbean, Europe, and Asia ³⁶
Air China	China's aviation authority is allowing the restart of direct flights to Beijing from eight nations ³⁷
Air France-KLM	Air France-KLM plans to operate at only about 55% of capacity during November ³⁸
Air India	Air India is planning to start a new initiative for those who want to travel but have nowhere to go. Under the 'flights to nowhere' program, Air India will take the travellers for a picturesque journey in the sky ³⁹
Alitalia	Alitalia has begun a trial program of in-airport pre-flight COVID-19 testing for select flights between Rome Fiumicino and Milan Linate. Passengers will be required to take a free rapid antigen test at the airport or show a negative molecular or antigenic test result from within 72 hours before boarding ⁴⁰
British Airways	The airline is running at 25% to 30% of its normal flight schedule ⁴¹
China Eastern	China Eastern carried 8.5 million domestic passengers in August – 2.5% higher than January's 8.3 million. Month on month, it is an 18.2% increase, although the figure is about 15% lower year on year ⁴²
China Southern	China Southern carried 10.3 million domestic passengers in August, which was 8% higher than in January. The figure represents a 14.3% increase month on month but was about 16% lower than last year's numbers ⁴³
Emirates	Emirates continues its operations gradually, prioritizing the safety of its passengers, crew, and the communities it serves worldwide, with five newly added destinations expanding its global network to 92 destinations ⁴⁴
Etihad	The airline now operates flights to a total of 58 international destinations ⁴⁵
Lufthansa	Lufthansa anticipates a significant increase in its passengers' leisure travel appetite during the summer of 2021 and is introducing fifteen new international routes from Frankfurt to Europe, Asia, and Africa ⁴⁶
Japan Airlines	Japan Airlines Co. is testing self-service kiosks that let passengers complete check-in without touching a computer screen as a safeguard against the coronavirus ⁴⁷
Korean Air	No/insufficient information
Qantas	Qantas' seven-hour sightseeing "flight to nowhere" which departs and lands right back at Sydney Domestic Airport sold out in 10 minutes ⁴⁸
Ryanair	Ryanair has cut its annual passenger target to 50 million, a reduction of 10 million, as Europe's biggest carrier expects the winter travel market to be a "write-off" ⁴⁹
Qatar	Qatar is operating flights to more than 28 destinations in Asia-Pacific, 31 in Europe, 12 in the Middle East, and nine in North America ⁵⁰

KEY TAKEAWAY: Pressure on airlines is building and risk is high. Despite this, airlines continue to schedule thousands of flights even as many of them will be canceled due to weak demand.

ACCOMMODATION & EVENTS

- GLOBAL: Among member companies of the Global Travel Business Association, 45% expect in-person events to resume in the first half of 2021⁵¹
- GLOBAL: Even though August produced the industry's lowest year-over-year demand decline since March, hotel revenue was stagnant in the US⁵²
- CANADA: The week ending September 19 showed slightly lower performance from prior weeks for Canada's hotel industry. In a year-over-year comparison, the industry reported a 52.8% drop in occupancy to 37%, a decrease in ADR to \$121.94, and a 68% decrease in RevPAR to \$45.17. British Columbia was the only province to surpass a 40% occupancy level⁵³

KEY TAKEAWAY: Hotel performance gains have slightly leveled off with the end of summer. Corporate and business travel is expected to remain at a standstill for the rest of 2020.

CRUISE

- GLOBAL: Cruise Lines International Association (CLIA) announced the adoption of mandatory core elements for a health protocol to be implemented as part of a phased-in, highly controlled resumption of operations⁵⁴

KEY TAKEAWAY: CLIA's mandatory guidelines provide minimum requirements and protocols to ensure consistency across the sector and ultimately improve consumer confidence. Cruise operators are provided with the flexibility to tailor the guidelines based on their ship and enhance elements as they see fit.

MAJOR TOUR OPERATORS

- GLOBAL: Intrepid has found that a quarter of the top 25 itineraries booked by its customers globally over the past three months have been family-themed tours, compared to just 12% during the same period last year, indicating a desire for families to go abroad in 2021 after months spent distancing⁵⁵
- GLOBAL: For travelers itching for a mini-adventure, G Adventures is offering new one-day journeys. US travelers can enjoy the One Day in Boston: Sunrise to Sunset local experience and in Canada, a similar one-day experience is being offered in Toronto⁵⁶

KEY TAKEAWAY: From family tours to mini-adventures, major tour operators are continuously revamping their offerings to meet the changing needs and desires of different traveller audiences.

SOURCES

- 1 <https://www.ontario.ca/page/reopening-ontario>
- 2 <https://www.cbc.ca/news/canada/montreal/quebec-covid-alert-system-1.5715490>
- 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/phase-four.html>
- 6 <https://projects.sfchronicle.com/2020/coronavirus-map/california-reopening/>
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- 9 <https://forward.ny.gov/phase-four-industries>
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- 11 <https://www.cnn.com/2020/09/22/boris-johnson-halts-the-uks-reopening-as-coronavirus-cases-surge.html>
- 12 <https://www.dw.com/en/coronavirus-digest-france-imposes-restrictions-after-record-cases/a-55046847>
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- 14 <https://mexiconewsdaily.com/news/coronavirus/most-states-could-turn-green-by-october/>
- 15 https://www.worldometers.info/coronavirus/?utm_campaign=CSauthorbio
- 16 <https://www.who.int/news-room/detail/23-09-2020-covid-19-pandemic-countries-urged-to-take-stronger-action-to-stop-spread-of-harmful-information>
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