## Recovery Signals Framework (as of April 15, 2020)







#### We are planning on 6 streams of research

**Stream A.** Economic Models assess total revenue, GDP, job losses, tourism businesses impacted, foregone tax revenue(total, by industry sub-segment, by province)

**Stream B.** Current Industry Impacts of COVID-19, as measured by revenue lost (domestic, by source market, by destination, by leisure & by business events)

**Stream C.** Recovery Signals. when, where and how markets will return

**Stream D.** Support to Domestic Marketing.

Stream E. Community Impacts of COVID-19, including willingness to host visitors

**Stream F.** Changes in Consumer / Traveller Perceptions and Behaviours



#### Our core approach to dealing with COVID-19's effects



## We believe in tourism

It is not a matter of "if" we rebound, but how fast



## We believe in Team Canada

How fast we rebound will be determined by how well we work together



#### It is a fluid & fastmoving situation

Flexibility is key moving forward, hence a "WIP"



#### Destination Canada's Caveats and Interpretation Notes

This represent the views of Destination Canada and is based on their analysis and interpretation. It does not represent the views or analysis of partners or of organizations whose data some of the analysis is built on.







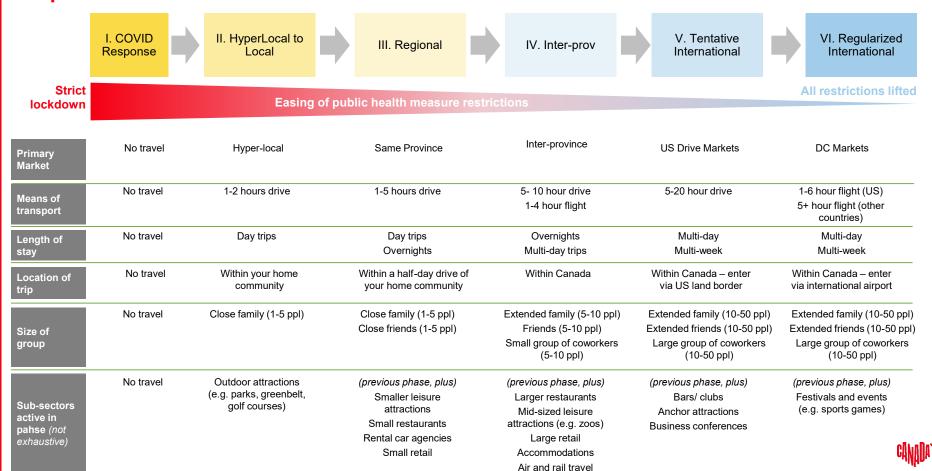
## Potential blueprint for staged recovery of the wider Canadian economy, built from lessons from Asia<sup>1</sup>

		Stages of lockdown				
		Strict lockdown	Partial lift - stage 1	Partial lift - stage 2	Partial lift - stage 3	
General population	Higher risk	Stay at home or at designated location	Stay at home or at designated location	Stay at home or at designated location	Restrictions to transit in specified zones, times, and days	
	Others	Required to stay home in mandatory isolation	Restrictions to transit in specified zones, times, and days	No restrictions but remote work is highly recommended	No restrictions, but remote work is recommended	
Economic sectors	Essential	Government ensures the management of select essential supply chains (e.g. health) in partnership with private sector	Government partially manages essential supply chains in partnership with the private sector	Government begins to prepare the management of key supply chains in partnership with the private sector	All sectors are allowed to operate, and key supply chains operate on a market basis	
	Others	Only those that can operate on an online basis are allowed	Only a few sectors are allowed to operate and they need to comply with specific social distancing and health protocols	Most sectors are allowed to operate but they need to comply with specific social distancing and health protocols	All sectors are allowed to operate	
Transport		Intraregional mobility is limited to exceptional cases, no interregional mobility allowed	High restrictions to intraregional mobility, no interregional mobility allowed	Some restrictions to intraregional mobility, no interregional mobility allowed	No restrictions to intraregional mobility; interregional mobility is allowed but only between regions in Stage 3	
Assembly		Events are limited to household members and caregivers if required in private spaces	Events of up to 10 people are allowed in public and private spaces	Events of up to 50 people are allowed in public and private spaces	Events of up to 200 people are allowed in public and private spaces	

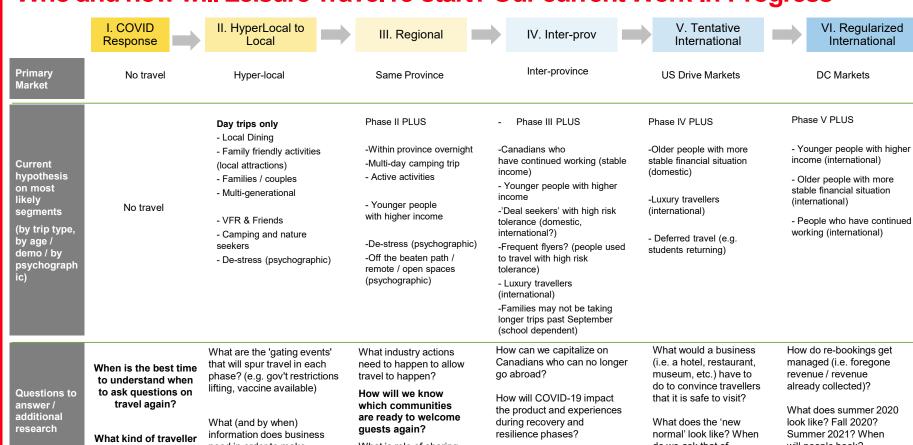
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Release of all lockdown measures

## The distance and length of time that people are willing and able to travel is assumed to shift as the public health restrictions are lifted



#### Who and how will Leisure Travel re-start? Our current Work-In-Progress



is willing to travel without a vaccine? need in order to make

investments to open for the

2020 summer season?

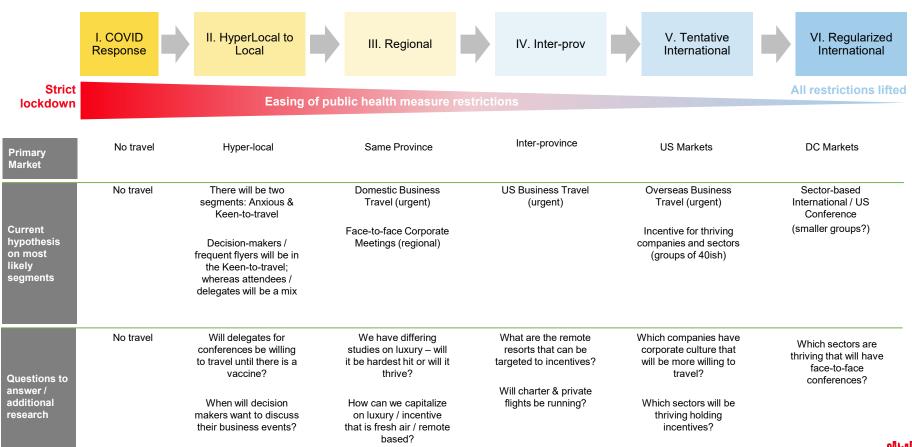
What is role of sharing economy?

Will we see more interest for outdoor activities? Remote regions? Nature and parks?

do we ask that of travellers?

will people book?

#### How could Business Events re-start? Our current Work-In-Progress Hypotheses





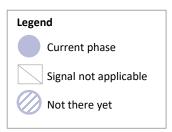
### DC's Recovery Analysis Framework

	What it tells us	Signals on Phase	Comment
Travel Search Index	Any consumer is looking for travel (upper funnel)	II. Hyper-local travel onward	Confidential Google Data
Accommodation Searches on OTA	A traveller is searching for a specific destination (lower funnel)	II. Hyper-local travel onward	Confidential Online Travel Agency (OTA) Data
Rate of Hotel Booking	Travellers are booking travel (lower funnel)	III. Regional Travel onwards	Confidential OTA Data
Rate of Air Bookings	Travellers are comfortable on planes (lower funnel)	IV. Inter-Province travel onwards	Confidential OTA Data & IATA
New COVID Cases	State of outbreak	I. COVID Response to IV. Intra-Province	Public Data
COVID-19 Search Index	Sentiment on outbreak	I. COVID Response	Under Development
Dining / Events Search Index	Any consumer is beginning to be comfortable in social gathering settings	I. COVID Response & II. Hyper-Local	Google Data
Traveller Path to Purchase	Phase of funnel specific targets are in	IV. Intra-Province Travel Onwards	Survey data to be used when we leave Phase I. COVID Resposne
Social Sentiment	TBD	TBD	Under Development



## DC's Recovery Analysis: Canada

			Ph	ase			
Canada (April 15)	COVID Response	   HyperLocal	<b>III</b> Regional	<b>IV</b> Inter-prov	V Tentative Int'l	VI Regularized Int'l	Analysis
Travel Search Index							Still declining
Accommodation Searches on OTA					0		Steep declines earlier in the month. No signs of recovery
Rate of Hotel Booking							National occupancy rate under 10% (STR source). Not applicable at this stage.
Rate of Air Bookings				0			Not applicable at this stage
New COVID Cases							Further analysis by Province / Region may be required
COVID-19 Search Index							Under development
Dining / Events Search Index							Still declining
Traveller Path to Purchase							Not applicable at this stage
Social Sentiment							Under development





## DC's Recovery Analysis: South Korea

**Destination Canada's Assessment of South Korea market:** 

II Domestic Destination Canada assesses that South Korea has left the COVID Response phase, and that domestic travel within South Korea is being considered, planned, and booked; and that trips are being taken. There is insufficient signal to indicate that South Koreans are considering or planning international travel at this point.

		Phase									
	COVID Response	<b>II</b> Domestic	<b>III</b> Tentative Int'l	<b>IV</b> Regularized Int'l							
Travel Search Index		0	0	0							
Accommodation Searches on OTA		•	0	0							
Rate of Hotel Booking		•	0	0							
Rate of Air Travel		•	0	0							



#### Forward Looking Data will provide what season to focus on

Change in net planned travel (air) as of April 23 (US) April 27 (all others), 2020

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	Phase	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	2021 Q1	2021 Q2	2021 Q3	2021 Q4
US	1													
Mexico	1													
UK	1													
France	1													
Germany	1													
India	- 1													
China	1													
South Korea	II													
Japan	- 1													
Australia	1													





# Thank you! Merci!



