State of the Hospitality & Tourism Industry

The webinar will begin shortly
Ingrid Jarrett - President & CEO, BCHA
What you told us: your advocacy priorities

1. Extending the wage subsidy
2. Property tax relief
3. Securing liquidity
4. Insurance renewal and premiums
5. BC Hydro relief
6. Short term rental position

CERB was #1 Labour issue, and is now transitioning to EI
BCHA Topics

• BC State of Accommodation Industry
• HAC Priorities
• Temporary Layoff Provisions
• Insurance Update
• Liquidity
• CEW Update
• Property Tax Submission
• BC Hydro
• Check In Canada Strategy
TIABC

Walt Judas – CEO, TIABC
TIABC Advocacy Priorities

- Liquidity
- Regional Relief & Recovery Fund (RRRF)
- Canada Emergency Wage Subsidy (CEWS)
- Taxes, fees, levies
- Temporary layoff extensions
- Wholesale pricing for the hospitality sector
- Assistance for community destination marketing organizations
TIABC Topics

• Borders
• Meetings & Events Re-start
• Recovery Funding
• RRRF
• Key Messages and Actions
Canada – State of the Accommodation Industry

• March: 31.5%
• April: 14.7%
• May: 19%
• June: 24.7%
• July: 31.8%
• Occupancy as of August 26 – 42.9%

STR Occupancy Forecast:

2021 Q1: 30%

2022 Q1 projected at 50% and will be plateaued for all of Q1.
BC - State of the Accommodation Industry - August Pulse Survey

Confirming our focus and your priorities:

• Number of employees still laid off across BC: 30,858 (seasonal positions included)

• Average expected occupancy for 2020 32%

• 40% of businesses recalled their team. 58% have not and will not be recalling in 2020.

• Downtown Vancouver has lowest occupancy.

• Resort destinations are recording strong summer numbers.

• 25% of B.C. accommodators have used the Temporary layoff extension tool

• Almost half cited a recall date into 2021
Regional BC

Many accommodators across the province are still operating with minimal staffing levels and occupancy. Vancouver and the surrounding area is still seeing stunted occupancy levels with the Caribou Chilcotin Coast region sitting at the lowest expected occupancy for the remainder of the year. Parts of Vancouver Island and Interior of BC having better levels due to resort destination demand. The following stats are the current forecast to year end Aug-Dec inclusive.

- Downtown Vancouver – Average Expected Occupancy - **25%**
- Vancouver Island – Average Expected Occupancy - **37%**
- Vancouver Coast and Mountains (Whistler) – Average Expected Occupancy - **25%**
- Thompson Nicola / Okanagan – Average Expected Occupancy - **41%**
- Northern BC – Average Expected Occupancy - **36%**
- Kootenay Rockies – Average Expected Occupancy - **34%**
- Cariboo Chilcotin Coast – Average Expected Occupancy - **17%**
## State of the Industry

### DOMESTIC OVERNIGHT VISITORS – YEAR OVER YEAR VARIATION

#### B.C. REGIONS

<table>
<thead>
<tr>
<th>Week No.</th>
<th>Date (Week Ending)</th>
<th>BC (%)</th>
<th>Thompson Okanagan</th>
<th>Cariboo Chilcotin Coast</th>
<th>East Kootenay Rockies</th>
<th>Northern BC</th>
<th>Vancouver Island</th>
<th>Vancouver Coast and Mountains</th>
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<tbody>
<tr>
<td>Week 1 - February 3 - 9</td>
<td>06-Feb</td>
<td>-27.4%</td>
<td>-10.8%</td>
<td>-12.0%</td>
<td>-1.0%</td>
<td>-3.0%</td>
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<td>Week 2 - February 10 - 16</td>
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<td>7.7%</td>
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<td>6.3%</td>
<td>23.5%</td>
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<tr>
<td>Week 3 - February 17 - 23</td>
<td>23-Feb</td>
<td>-4.9%</td>
<td>3.0%</td>
<td>24.0%</td>
<td>-11.0%</td>
<td>26.0%</td>
<td>-17.6%</td>
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<tr>
<td>Week 4 - February 24 - March 1</td>
<td>01-Mar</td>
<td>-3.8%</td>
<td>-2.5%</td>
<td>0.0%</td>
<td>-9.6%</td>
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<td>-12.2%</td>
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<td>Week 5 - March 2 - 8</td>
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<td>-9.9%</td>
<td>5.6%</td>
<td>5.7%</td>
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<td>-28.3%</td>
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<td>Week 8 - March 23 - 29</td>
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<tr>
<td>Week 9 - March 30 - April 5</td>
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<td>Week 10 - April 6 - 12</td>
<td>12-Apr</td>
<td>-99.6%</td>
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<td>Week 11 - April 13 - 19</td>
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<td>Week 14 - May 4 - May 10</td>
<td>10-May</td>
<td>-89.9%</td>
<td>-88.8%</td>
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<td>-3.3%</td>
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<td>-60.4%</td>
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<tr>
<td>Week 15 - May 11 - May 17</td>
<td>17-May</td>
<td>-95.1%</td>
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<td>Week 16 - May 18 - May 24</td>
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<td>-29.6%</td>
<td>-50.3%</td>
<td>-85.6%</td>
<td>-62.3%</td>
<td>-63.8%</td>
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<tr>
<td>Week 17 - May 25 - May 31</td>
<td>31-May</td>
<td>-83.3%</td>
<td>-50.3%</td>
<td>-33.4%</td>
<td>-45.8%</td>
<td>-85.4%</td>
<td>-55.0%</td>
<td>-56.8%</td>
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<tr>
<td>Week 18 - June 1 - June 7</td>
<td>07-Jun</td>
<td>-87.1%</td>
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<td>-23.6%</td>
<td>-39.7%</td>
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<tr>
<td>Week 19 - June 8 - 14</td>
<td>14-Jun</td>
<td>-52.9%</td>
<td>-46.7%</td>
<td>-16.0%</td>
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<td>-51.8%</td>
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<td>Week 21 - June 22 - 28</td>
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<td>-56.8%</td>
<td>-54.3%</td>
<td>-60.7%</td>
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<td>-59.2%</td>
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<tr>
<td>Week 22 - June 29 - July 5</td>
<td>05-Jul</td>
<td>-93.5%</td>
<td>-34.0%</td>
<td>-22.5%</td>
<td>-41.2%</td>
<td>-39.7%</td>
<td>-45.5%</td>
<td>-46.0%</td>
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<tr>
<td>Week 23 - July 6 - 12</td>
<td>12-Jul</td>
<td>-85.6%</td>
<td>-40.3%</td>
<td>-23.8%</td>
<td>-37.5%</td>
<td>-46.3%</td>
<td>-49.9%</td>
<td>-52.1%</td>
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<tr>
<td>Week 24 - July 13 - 19</td>
<td>19-Jul</td>
<td>-83.1%</td>
<td>-62.2%</td>
<td>-23.8%</td>
<td>-48.5%</td>
<td>-84.0%</td>
<td>-69.0%</td>
<td>-53.3%</td>
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<tr>
<td>Week 25 - July 20 - 26</td>
<td>26-Jul</td>
<td>-92.7%</td>
<td>-52.8%</td>
<td>-17.0%</td>
<td>-42.3%</td>
<td>-34.9%</td>
<td>-44.6%</td>
<td>-50.7%</td>
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<tr>
<td>Week 26 - July 27 - August 2</td>
<td>02-Aug</td>
<td>-31.5%</td>
<td>-26.8%</td>
<td>-30.6%</td>
<td>-32.5%</td>
<td>-26.2%</td>
<td>-32.3%</td>
<td>-32.7%</td>
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<tr>
<td>Week 27 - August 3 - August 9</td>
<td>09-Aug</td>
<td>-25.2%</td>
<td>-25.5%</td>
<td>-1.7%</td>
<td>-26.6%</td>
<td>-27.2%</td>
<td>-18.4%</td>
<td>-24.5%</td>
</tr>
<tr>
<td>Week 28 - August 10 - August 16</td>
<td>16-Aug</td>
<td>-24.9%</td>
<td>-27.1%</td>
<td>-24.2%</td>
<td>-18.7%</td>
<td>-24.8%</td>
<td>-23.5%</td>
<td>-20.5%</td>
</tr>
<tr>
<td>Week 29 - August 17 - August 23</td>
<td>23-Aug</td>
<td>-27.1%</td>
<td>-25.0%</td>
<td>-3.2%</td>
<td>-23.6%</td>
<td>-24.9%</td>
<td>-30.4%</td>
<td>-33.4%</td>
</tr>
</tbody>
</table>
State of the Industry

REVENUE LOSSES
• Major attractions – 70-90%
• Tour bus operators – 95-100%
• Cruise – 100%
• Meetings & Events sector – 90%
• Guide outfitters – 85%
• Wilderness tour operators – 85%
• Whale watching – 60-90%
Recovery Funding

That the Province of BC provide an initial investment of $680 million (short/medium term) and additional stimulus funding (med./long-term) to help mitigate the impacts of C-19 on the visitor economy.
Recovery Funding

1. Working Capital Recovery Grant = $475 million to address liquidity

2. Support for Adaptation Costs = $190 million

3. Support for BC-focused Supply Chains = $15 million
Recovery Funding - Status

- Government is working through submissions
- Tourism recognized as one of the hardest hit
- Multi-sector and stakeholder approach
HAC Priorities

• 1. Protect Employment
• 2. Provide adequate and accessible liquidity program for Hotels
• 3. Support Industry-Led Health and Safety Programs
• 4. Reduce Use of Risky Short-Term Rentals
• 5. Stimulate Canada’s Hotel Sector
HAC 5-Point Plan

1. Protect Employment

Employees are the backbone of this service industry. As hotels often serve as an entry point for new Canadians, many hotel workers will face limited retraining options due to critical language skill barriers. Our work force is heavily representative of women and young Canadians. These jobs are important and they need to be protected.

Amend the CEWS legislation to apply the Safe Harbour principle to periods 7, 8, and 9 for businesses with a sustained revenue decline.
HAC 5-Point Plan

2. Provide Accessible Liquidity and Financial Supports for Hotels

The Government’s loan programs are largely inaccessible to hotels, and do not address the pressing need to cover fixed costs.

RECOMMENDED GOVERNMENT ACTION

Implement an immediate hotel liquidity and support program with the following terms:

- Streamlined access with a 100% loan guarantee
- Loan of up to 20% of annual revenues
- Include component equivalent to the commercial-rent-assistance program to cover three months of fixed mortgage payments
- Low interest and fees with repayment terms comparable to international programs
- No personal guarantees

Canada experienced record-setting nation-wide tourism before COVID-19

In past crisis, the hotel sector has recovered quickly.

A quicker recovery will be possible with targeted government supports. Absent these measures, the industry could take more than 18 months to return to 2019 levels.
HAC 5-Point Plan


Investments in health and safety standards have come at great cost to the hotel industry in the face of a crippling losses in revenue.
HAC 5-Point Plan

4. Reduce Use of Risky Short-Term Rentals

Unregulated short-term rental platform companies, like Airbnb, are not required to meet provincial health and safety regulations. They are also linked to housing shortages, community crime and nuisance. These risky providers should not be afforded tax preferences that give them an unfair advantage over Canadian employers who charge and remit all appropriate taxes and follow all health safety regulations.

**RECOMMENDED GOVERNMENT ACTION**

1. Require short-term rental platform companies to pay corporate income tax and collect and remit HST/GST on their services.

2. Have the platform companies charge and remit HST/GST on behalf of hosts from dollar one of revenue.

An investment into the hotel sector and its recovery is support for a professional accommodation provider that plays by the rules, unlike the short-term rental industry.

- **SHORT-TERM RENTALS ARE RISKY BUSINESS**
  - Does not pay taxes
  - Does not follow regional health & safety standards
  - Difficult to contact/trace
  - Eliminates long-term housing

Airbnb removed 31,000 homes from Canada’s housing market in 2018.

- Nearly $100 million in lost tax revenue (if the consumer tax rates were applied to Airbnb).
5. Stimulate Canada’s Hotel Sector

As other countries have done, Canada should invest in a series of stimulus measures to encourage Canadians, and eventually, international visitors to experience Canada again.

**Recommended Government Action**

1. Create federal tax incentives or credits to encourage domestic travel.

2. Once mass gathering bans are lifted, incentivize group gatherings and meetings business.
Regional Relief and Recovery Fund Update

• Allocation for Western Canada covered four provinces
• Program was over-subscribed
• Many businesses were either rejected or did not hear back
• Consideration being given to a second intake
• Focus on a BC solution for the tourism and hospitality industry
Temporary Layoff Provisions

• Extended to Aug 30 (significant effort to get this extended)
• Temporary layoff Portal application 25% of hotels applied
• Collective Bargaining, negotiations – owners and unions must visit this language in collective agreements to ensure recall language supports both parties in recovery
• Employers will rehire their teams as soon as there is business to do so.
Border Re-opening - Walt
Border Re-opening

- Slow and controlled re-opening
- Rural or remote areas of BC
- Guests and staff within same bubble – no community contact
- Tests before, during and after
- Monitored by federal and provincial health officials
- Dialogue and endorsement of Indigenous communities
Border Re-opening

• Criteria for re-opening
  • Vaccine
  • Rapid testing
  • Percentage threshold of COVID-19 transmissions
  • Based on pandemic scenario in other ‘bubble’ countries

• Next steps – Re-submit proposal to feds and province
Future Borders Coalition

• A group of bi-national organizations with a vested interest in advancing the efficiency, safety and security of the Canada–U.S. border

• The implementation of a phased approach coordinated by a Joint Task Force is more likely to ensure an orderly, safe and gradual easing of restrictions.
Future Borders Coalition

Principle #1 – A bi-national and coordinated approach should be adopted with the aim to develop mutually accepted risk-mitigating measures and health protocols
Future Borders Coalition

Principle #2 – Both governments should adopt a layered risk-based approach when reviewing entry requirements and travel restrictions
Future Borders Coalition

Principle #3 - A phased approach for easing border restrictions should be informed by science-based criteria and communicated based on easily understood requirements
Future Borders Coalition

Principle #4 – The economic impact of border closures should be carefully assessed by both governments and inform the path towards the easing of border restrictions
Future Borders Coalition

The Common Pass Project

Countries set entry requirements based on nationality, point of origin, type of testing (e.g. PCR) and timeframe (e.g. 72/96 hours).
Future Borders Coalition
North-West Regional Tourism Rebound
PNWER Tourism Rebound

• When both governments agree that it is safe to do so, Canada and the U.S. must present a strong, safe, and well-coordinated border reopening message
PNWER Tourism Rebound

• Develop a tourism restart plan that presents consistent and unified safety protocols and best practices that can be agreed upon and used by both countries.

• Convene bilateral round tables, prior to the border reopening, with specific tourism and travel sectors such as air, ferry, and cruise to troubleshoot operating protocols.

• Collaborate on marketing opportunities between Canada and the U.S. to spur recovery, expand markets, and compete globally.
PNWER Tourism Rebound

• Stimulate the “rubber tire market” as soon as it is deemed safe to do so
• Foster collaboration to ensure clear and consistent communication is issued to tourism operators as well as the public concerning health and safety protocols
• Ensure government at all levels is aligned and supportive of the safe resumption of travel and tourism and are willing to play a key role in encouraging the public to participate in PNWER’s tourism economy
PNWER Tourism Rebound

• Travel between our respective countries is paramount to the success of the visitor economy. As residents, tourism businesses and communities, we look forward to again welcoming American visitors once it is deemed safe to do so.

Walt Judas
Tourism Industry Association of BC
PNWER Tourism Rebound

• For Tourism to survive and thrive, we need to get back to "Normal" as soon as possible. The "New Normal" does not work in our industry and as companies fail over the next few months, it will take years to replace their spot in the BC economy. We must do all we can to support the sector now to have it here in 2021 and beyond.

John Wilson
Wilson's Group of Companies
PNWER Tourism Rebound

• We need a thoughtful plan to gradually open the international borders. We can do this safely. Restarting the tourism sector is critical to economic recovery.

Guide Outfitters Association of BC
PNWER Tourism Rebound

www.pnwer.org
Insurance Update

• Hardening of the Insurance market
• Increased claims due to fire, flood, water damage, age of buildings
• Anticipate rate increases
• Self funded insurance program has served our industry well, continuing to source underwriters for renewal date of Dec 1.
• Opportunity to grow participants in program
• Beverage program predominately successful with August renewal
• Class Action suits are not helping with renewals/rate negotiations
Liquidity

• CEWS – the single largest liquidity relief measure
• Interest free, or low interest loans with extended repayment terms, backed by government
• Tax relief – business tax, property tax, BC Hydro relief
• Open the meeting market +50 people
CEWS Update

• Most beneficial relief measure to date from the federal govt. for our industry.

• Advocacy position is that our industry needs to stay at 75% wage subsidy, as long as 30% year over year revenue drop, calculated month by month.

• Needs to extend to spring 2021.
Meetings where we all got together, conferences, those are not going to happen this year anywhere in the world.

Until these things happen, BC will not be hosting rock concerts, conventions or any large gatherings beyond 50 people.
Meetings & Events Re-start

• Implement a rolling evaluation plan to assess and/or adjust restrictions on gatherings and events every 30 days.

• Utilize space configuration measures or models in conjunction with accompanying distance protocols.
Meetings & Events Re-start

• ORDER OF THE PROVINCIAL HEALTH OFFICER GATHERINGS & EVENTS
  • Large gatherings promote the transmission of COVID-19
  • Doesn’t apply to workers at a worksite, retail establishment, campground, etc.
  • Applies to meetings or conferences held in hotels; weddings, funerals, festivals, sporting events, etc.
Meetings & Events Re-start

Under Section 43 of the Public Health Act, an order may be reconsidered if:

1. Have additional relevant information that was not reasonably available when the order was issued
2. Have a proposal that was not presented to the PHO when the order was issued but could be suitable
3. Could be suitable as the basis of a written agreement
Meetings & Events Re-start

SAFE START GUIDELINES

• Controlled environment
• Low risk – attended by invited, pre-registered and qualified guests
• Demographics – same company, industry; contact tracing
• Design and space can be customized
Meetings & Events Re-start

Under Phase 4, large gatherings such as conventions, live audience professional sports, concerts and international tourism can occur if one of three conditions are met:

1. Wide vaccination
2. Community immunity
3. Broad successful treatments
Meetings & Events Re-start

- Work group to meet with the Province this week to seek guidance on how to provide a submission that meets the criteria under section 43 to compel the PHO to review the current order on gatherings and events
- More than 50 not likely to happen soon
- BCHIA has developed guidelines on current operations
Property Tax Submission -

• **Provide forgiveness of 2020 property taxes for the hotel industry**: This would provide immediate relief for the industry and allow the economic landscape to stabilize for the 2021 tax year. This forgiveness would be available to businesses who have seen a 30% drop in their revenues. Property tax assessments need to be based on 2020/2021 revenues moving forward.

or

• **Allow deferral of 2020 and 2021 property taxes to be repaid in installment payments through 2022/23**: This option would collect 50% of 2020 property tax, and 100% of 2021 property taxes with repayment plan of full payment in installments through 2022/2023. This will ease the fiscal burden, while preventing the creation of large one-time payments for the tourism and hospitality industry at a time when no or low revenue is coming in. It is important that these are interest free deferrals. All properties with a 30% year over year revenue loss 2020 vs 2019 should be eligible. Property tax assessments need to be based on 2020/2021 revenues moving forward.
• Thus far, there has been no specific relief measures for the hotel industry, and many relief measures deem the hotel sector ineligible, such as BC Hydro relief. We believe a 30% drop in revenue year over year, 2020 vs 2019 is a solid measurement for providing relief to the businesses that need it the most. Hotels are currently assuming additional debt to pay fixed costs and some have even had to write personal guarantees in order to cover financing obligations. In order to alleviate this hardship, relief measures should be at low or no interest, allow repayment over time, and be backed by government.

• Manitoba has announced support for the business community by deferring business taxes and property taxes until November 30, 2020.
Check in Canada Strategy

• Recovery Submission to the Federal Govt to blanket Canada from Destination Canada, PDMO’s, CDMO’s and all properties

• Check in Canada portal to website, add Tourism businesses and restaurants, attractions in phase 2

• Direct all of our campaigns to check in canada to a single access digital platform and hopefully reduce intermediary costs
Recovery Funding

B.C. tourism sector seeks $680m stimulus package from province

By Darren Kloster, Times Colonist | July 21, 2020, 12:46pm

The Tourism Industry Deserves More Time

August 12, 2020
Dear Tourism Partners,

As you are aware, the COVID-19 pandemic is having a profound effect on tourism operators and businesses. Many of them have reached out to my office to express their fear that there has not been enough done by the Government to support the industry in this difficult time.

The Liberal Government needs to be taking a proactive approach to consulting with the tourism industry and to understanding the profound impact the pandemic has had on them. They also need to take meaningful industry specific action.

This week, the Standing Committee on Industry met with tourism stakeholders on needed solutions in the industry as a response to the COVID-19 pandemic. This meeting was a result of my Conservative colleagues forcing a meeting on this important topic. You can watch the full meeting here. You can also watch my full line of questioning here.

Unfortunately, when the Conservative Members on the committee asked for further meetings at the committee, the Government Members would not agree to any.

This is where you come in. You have an opportunity to let the committee know that more meetings are absolutely required to find proactive solutions for the industry during this difficult period. Send an email to the Committee Clerk, Michael MacPherson to request to appear at Committee, and copy me at blake.richards@parl.gc.ca.

Please know that Conservatives will continue to stand up and fight for this important Canadian industry and ensure that your voices are heard and will continue to ensure that the federal government provides the critical support and solutions that our industry requires.

Sincerely,
Blake Richards, MP Benfèi-Airdrie
Official Opposition Shadow Cabinet Minister for Tourism and Western Economic Diversification, Market Access and Development
Recovery Funding – Key Messages

State of the Industry

• Struggling
• Desperate
• Operators trying to avoid bankruptcy
• Uptick in certain areas in July and August does not tell the real story
Recovery Funding – Key Messages

Industry Needs

- Securing liquidity
  - Working capital grants (i.e. cash)
  - Low or no interest loans
- Extending the wage subsidy
- Property tax relief
- Insurance renewal and premiums
- BC Hydro relief
- Short term rental position

- Regional Relief & Recovery Fund (RRRF)
- Canada Emergency Wage Subsidy (CEWS)
- Taxes, fees, levies
- Temporary layoff extensions
- Wholesale pricing for the hospitality sector
- Assistance for community destination marketing organizations
Recovery Funding – Key Messages

Recovery

• Encourage travel from other parts of Canada
• Plan for and set targets to open borders
• Multi-year investments in stimulus and marketing funds
• Get people back to work
Importance for Recovery

Talk to MLA’s (Cabinet Ministers), MPs, bureaucrats, local Mayors and Councillors – talk about the reality of your businesses, the lack of demand, your fiscal circumstance and the need to support our industry.
Q&A

Open Forum – Please submit questions via the chat function
Thank you

If you have any follow up questions or inquiries, please contact:
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