

STATE OF TOURISM IN CANADA DURING COVID-19

DASHBOARD (2.0) – NOVEMBER 2020



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KEY INSIGHTS: TWENTY31

INTERPRETATION OF FINDINGS

GLOBAL

- The COVID virus continues to spread dramatically around the world with many countries and regions re-entering lockdown; Countries and regions are now, unlike the previous wave, better prepared with more information gleaned from previous lockdowns and now taking a more surgical approach to measures.
- Three COVID-19 vaccines have recently been approved for use on humans in many countries, however, production and transportation logistics for the dissemination of the vaccines will be complex. Some countries (primarily those with more developed economies) will likely receive the vaccine before other countries in lesser developed regions, potentially causing an initial imbalance to the return of global travel and tourism. As well, there remains trepidation from many consumers (one study suggests 41% of Americans will take a wait and see approach to getting the vaccine) which may also delay a freer movement of people across borders.
- While Qantas Airlines recently suggested proof of vaccination would be required for international travel on their airline, it is unclear whether this will be a policy of the Australian government or other destinations that may require proof of vaccine for international entry or which may only require proof of Covid-free test. Government policy on pre-conditions to open international borders based on the extent of these requirements will have a significant impact on which source markets will support their recovery the fastest.
- The U.S., UK, EU, Canada and Japan have secured 1.1 billion shots of Pfizer's vaccine, roughly 85% of planned production though 2021; Moderna's first 20 million doses will head to the U.S., which as a contract for 100 million and will be distributed first among the elderly, people with underlying conditions and essential workers; COVAX, a WHO-led initiative will provide subsidized vaccine access for 92 lower- and middle-income countries, particularly Africa, South and Southeast Asia.

CANADA

- Mirroring the global scenario, Canada is also experiencing a strong second wave of COVID cases, resulting in increased province-wide restrictions and an extended border closure to January 21st; some tourism businesses remain open offering winter experiences with strict safety measures in place, whereas other tourism businesses have been forced to pause until 2021 or in worst-case scenarios, close.
- The government is taking targeted action to support Canadian tourism sector businesses that continue to face uncertainty and economic challenges because of the pandemic; the new Canada Emergency Rent Subsidy, new Lockdown Support and the extended Emergency Wage Subsidy are measures designed to help businesses get through the second wave of the virus so they can protect jobs, continue to serve their communities, and be positioned for a strong recovery.
- Canada has contracts to millions of doses of the coronavirus vaccine under contract, with the first six million doses – enough for three million Canadians requiring the two doses each – beginning in January.

IMPACT ON CEF PROGRAM:

With COVID-19 cases continuing to rise, overall confidence about the safety of local and domestic travel has decreased, and most international travel remains at a stand-still. However, promising new vaccines and industry adaptations around safety and communication are positioning 2021 for possible recovery. Until then, many tourism sector businesses will need significant government financial support to survive the second wave. Ultimately, the distribution of effective vaccines, acceptance of evidence of vaccinations or recent COVID-19-free tests upon arrival and open borders without requirement of 14-day quarantine is seen as the best enabler of tourism industry recovery.



KEY TAKEAWAY SNAPSHOT

01 HEALTH IMPACT

Canada's borders will be closed until at least January 21, 2021. Vaccines, along with promising new strategies that involve testing visitors for COVID-19 prior to departure or upon arrival on flights and international border crossings are anticipated to have a positive influence on border re-openings and may significantly limit mandated traveller quarantine periods. To reduce the spread of COVID-19, Canadian airports can look to Rome's Fiumicino Airport, the first airport in the world to earn "the COVID-19 5-Star Airport Rating" from Skytrax, an international airport industry ratings body. Although Skytrax is best known for its annual rankings of the world's best airports, the global pandemic prompted the organization to come up with a designation for airport hygiene.

02 ECONOMIC IMPACT

Tourism plays a significant role as one of the world's most important economic sectors, providing livelihoods to hundreds of millions of people while boosting economies and enabling countries to thrive. It is imperative that international governments work together to harmonize global policy, lift restrictions and rebuild the tourism sector for it to regain its position as a provider of decent jobs, stable incomes and for the protection of cultural and natural heritage. In the meantime, tourism businesses need to take advantage of all government support available to survive the second wave and prepare for 2021.

03 FOCUS CASE STUDY 1 – LAPLAND, FINLAND

Now, more than ever, effective collaboration is essential. Developing innovative experiences that support the needs of tour operators, governments and public health is a necessary – and promising – adaptation to the new normal of 2020. New working relationships with public health authorities can be forged to build strong foundations that will protect and support the tourism sector in the immediate and longer-term future as the pandemic continues to unfold.

04 FOCUS CASE STUDY 2 – ANANTARA VELI RESORT, MALDIVES

Traditional destination marketing models are being replaced by creative offerings that capitalize on travel restrictions. Visionary destinations have the opportunity to emerge as industry-leaders targeting new types of travellers and shaping the future of tourism. Early adaptors can differentiate themselves by creating unlimited, remote working and ultimate social distancing packages with little to no market competition.

05 CANADIAN RESIDENT SENTIMENT TOWARD TOURISM

Despite rising COVID cases, most Canadians still feel reasonably safe to travel close to home and within their own provinces with the exception of those in BC and Ontario. Local travel remains the strongest opportunity for the Canadian tourism industry. Canada's internal travel restrictions are likely contributing factors to perceptions of safety abroad. As community-based tourism model, targeting local and some close domestic visitors will support the highest levels of traveller confidence, local tour operators can focus on generating business through the "staycation model" and increase revenues by offering products and experiences tailored to each season.

06 TRAVELLER BEHAVIOURS

Younger populations are the demographic most likely to engage in near-future, longer-term travel, and therefore may be a key audience to focus on in 2021. As Canadians are not travelling internationally, building back confidence in inter-provincial travel will continue to be paramount in the coming months. Provinces can monitor the success of the ArriveCAN program and potentially develop similar inter-provincial programs to increase positive sentiment towards domestic travel.

07 AVIATION

As countries around the world work to overcome the COVID-19 pandemic and restart their economies and tourism, they all face the challenge of how to reopen their borders and allow international travel to resume while protecting their populations' health. The current patchwork of policies and ever-changing border entry and health screening requirements has made international travel more complex, leaving airlines and border agencies uncertain about the validity of test results and passengers unsure of what is being asked of them. Emerging programs like the World Economic Forum's (WEF) CommonPass Program or China's QR code-based global travel system represent the opportunity to develop and launch standard global models to enable people to securely document and present their COVID-19 status (either as test results or an eventual vaccination status) to facilitate international travel and border crossing while keeping their health information private. Recognizing that countries will make sovereign decisions on border entry and health screening requirements, including whether or not to require tests or what type of test to require, these programs can serve as a neutral platform which creates the interoperability needed for the various 'travel bubbles' to connect and for countries to trust one another's data by leveraging global standards.

08 ACCOMMODATION & EVENTS

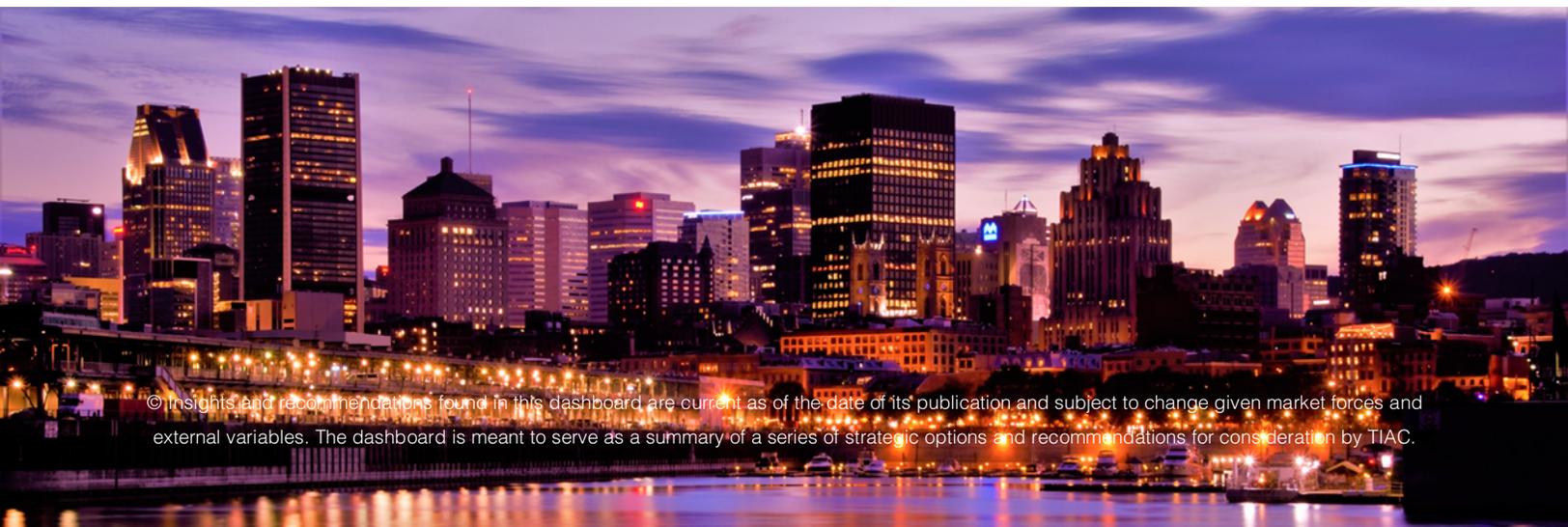
Uncertainty remains in all markets. However, the opportunity for destinations to connect with planners remains, as researching new destinations and being up to date on safety and restrictions is important to all planners in all markets. Partnerships between destinations and organizations have room to grow. Venue business models can be adapted as the ratio of rooms to meeting space is no longer feasible, and hybrid packages offering technology and production elements inspire new ways to host events.

09 CRUISE

In anticipation of the cruise ban being lifted, most cruise lines, such as Carnival Cruise Line, Norwegian Cruise Line, Royal Caribbean, MSC Cruises, Disney Cruise Line, Bahamas Paradise Cruise, and Virgin Voyage had already been working diligently to meet the new protocols set in place. Although cruising was shut down in the United States, some European cruise lines still continued to sail. The success of AIDA, Costa, Hurtigruten, Hapag-Lloyd Cruises, MSC, and TUI ships which all followed the guidance of the European Union's Healthy Gateways panel have proved that cruising can be done safely and can be seen as thought leaders in the post-COVID cruise industry.

10 MAJOR TOUR OPERATORS

Most Tour Operators plan to resume operations in 2021 - alongside COVID-19 – even if that means lower numbers or lower margins which is an encouraging sign for the resumption of business. Tour Operators are well-positioned to market professional services that help keep travellers safe and provide advocacy to help navigate COVID-related problems and challenges.



OVERVIEW

HEALTH IMPACT

KEY TAKEAWAY

Canada's borders will be closed until at least January 21, 2021. Vaccines, along with promising new strategies that involve testing visitors for COVID-19 prior to departure or upon arrival on flights and international border crossings are anticipated to have a positive influence on border re-openings and may significantly limit mandated traveller quarantine periods. To reduce the spread of COVID-19, Canadian airports can look to Rome's Fiumicino Airport, the first airport in the world to earn "the COVID-19 5-Star Airport Rating" from Skytrax, an international airport industry ratings body. Although Skytrax is best known for its annual rankings of the world's best airports, the global pandemic prompted the organization to come up with a designation for airport hygiene.

GLOBAL

- Confirmed deaths with COVID-19 surpassed 1.46 million globally, while worldwide cases climbed above 60.7 million with over 42 million recoveries¹
- In his opening remarks at the G20 Leaders Summit, World Health Organization Director-General, Tedros Adhanom Ghebreyesus, advised that to prevent future outbreaks and their impact on lives, livelihoods and economies, an immediate investment in \$US4.5 billion for vaccines is required, and G20 countries must ensure vaccines are allocated fairly as global public goods²

CANADA

- As of November 24, there have been a total of 337,555 confirmed cases and 11,521 reported deaths in Canada³
- Canadian borders remain closed to tourism; only essential travel, extended family members, international students, and few other exceptions are allowed to enter Canada with Canada-U.S. border restrictions specifically expected to remain in place until at least December 21⁴

ECONOMIC IMPACT

KEY TAKEAWAY

Tourism plays a significant role as one of the world's most important economic sectors, providing livelihoods to hundreds of millions of people while boosting economies and enabling countries to thrive. It is imperative that international governments work together to harmonize global policy, lift restrictions and rebuild the tourism sector for it to regain its position as a provider of decent jobs, stable incomes and for the protection of cultural and natural heritage. In the meantime, tourism businesses need to take advantage of all government support available to survive the second wave and prepare for 2021.

GLOBAL

- The COVID-19 crisis has highlighted the global importance of the travel and tourism industry economically, as well as its interconnectedness with other industries; border restrictions, lockdowns and social distancing have impacted everyone in the industry, from small tour operators to multinational hotel chains and major airlines⁵
- According to the latest World Travel & Tourism Council, COVID-19 will impact, in a baseline scenario, an estimated 121.1 million jobs, and more than \$3.4 trillion in GDP could be lost in 2020; the longer-term damage to the livelihoods of those in the industry remains to be seen⁶

CANADA

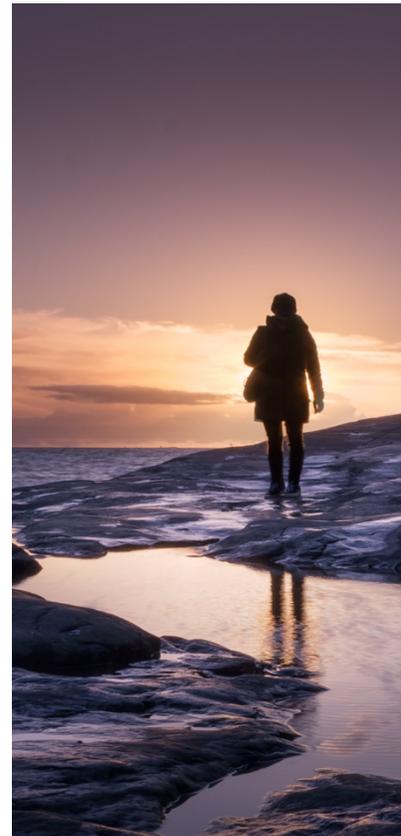
- As forecasted by the International Monetary Fund and the Organisation for Economic Co-operation and Development, the Canadian economy could shrink by 8% to 9.4% in 2020⁷
- Travel restrictions alone could lead to a decline in GDP growth in 2020, ranging from 1.2 to 1.7 percentage points; amid these latest forecasts, the travel restrictions could account for about 14% to 20% of the overall forecasted decline in GDP, much larger than the tourism industry's share of GDP, which underscores the disproportionately adverse impact the pandemic has had on tourism⁸

FOCUS CASE STUDY 1: COLLABORATION & INNOVATION HELPS LAPLAND SAVE CHRISTMAS FROM COVID⁹

KEY TAKEAWAY

Now, more than ever, effective collaboration is essential. Developing innovative experiences that support the needs of tour operators, governments and public health is a necessary – and promising – adaptation to the new normal of 2020. New working relationships with public health authorities can be forged to build strong foundations that will protect and support the tourism sector in the immediate and longer-term future as the pandemic continues to unfold.

- The Finnish government has been working very closely with tourism representatives from Lapland to strike the fine balance between controlling the spread of COVID and allowing their vital tourism industry to operate safely
- Despite a Europe-wide second wave of coronavirus cases that is prompting new lockdowns, Finland will allow 72-hour visits in the country without the need to quarantine
- Tourists from EU and Europe's 26-country Schengen visa area will be permitted to arrive provided they take a COVID test 72 hours before departure and have proof that it's negative
- Lapland's large network of tourism providers and destinations have also collaborated with the hospital district to create a COVID-safe travel model that includes keeping Santa behind acrylic glass and elves donning PPE
- Although 72 hours is a short stay for Lapland, operators have been tweaking schedules, cramming in sled rides, husky experiences and the chance to see the Northern Lights before getting travellers back to the airport in time for a swift departure in a collaborate effort to save Christmas and their tourism economy after a brutal year which saw visitor numbers plummet from record highs in 2019



FOCUS CASE STUDY 2: RESORT OFFERS \$30K 'ALL YOU CAN STAY' PACKAGE IN WORLD'S FIRST COUNTRY TO OFFER A TRAVEL LOYALTY PROGRAM¹⁰

KEY TAKEAWAY

Traditional destination marketing models are being replaced by creative offerings that capitalize on travel restrictions. Visionary destinations have the opportunity to emerge as industry-leaders targeting new types of travellers and shaping the future of tourism. Early adaptors can differentiate themselves by creating unlimited, remote working and ultimate social distancing packages with little to no market competition.

- Move over, all-you-can-eat buffet: the all-you-can-stay resort package has entered the market
- A new offer from the adults-only Anantara Veli in Maldives will allow travellers to use the resort as a personal vacation home with unlimited use over 2021
- Unlimited vacation packages, remote working and ultimate social distancing packages are some highlights of what is set to become the first-of-its-kind countrywide loyalty program
- Though specifics for how the program will work on a practical level have not yet been revealed, there are Gold, Silver and Bronze levels, which will correspond to the amount of money spent in-country and will come with rewards and perks for frequent visitors
- Maldives, which is heavily dependent on international tourism for its economy, was relatively early to open up its borders amidst the global coronavirus crisis

CANADIAN RESIDENT SENTIMENT TOWARD TOURISM WITHIN CANADA AND TOWARDS THE U.S. AND OTHER COUNTRIES¹¹

KEY TAKEAWAY

Despite rising COVID cases, most Canadians still feel reasonably safe to travel close to home and within their own provinces with the exception of those in BC and Ontario. Local travel remains the strongest opportunity for the Canadian tourism industry. Canada's internal travel restrictions are likely contributing factors to perceptions of safety abroad.

As community-based tourism model, targeting local and some close domestic visitors will support the highest levels of traveller confidence, local tour operators can focus on generating business through the “staycation model” and increase revenues by offering products and experiences tailored to each season.

In this section, we cover Canadian resident sentiment towards travelling within Canada to other communities and provinces, as well as to the U.S. and other countries. A pink box indicates majority negative sentiment; a green box indicates majority positive sentiment.

	AB	Atl. Reg.	BC	ON	QC	SK & MB
I feel safe to travel to communities near me	76%	80%	65%	69%	70%	61%
I feel safe to travel to communities in my province	67%	66%	47%	48%	61%	53%
I feel safe to travel to other provinces in Canada	51%	12%	29%	53%	46%	39%
I feel safe to travel to the United States	17%	12%	7%	10%	18%	12%
I feel safe to travel internationally	18%	5%	10%	11%	21%	11%

Majority positive sentiment
 Majority negative sentiment
 Neutral

TRAVELLER BEHAVIOURS

KEY TAKEAWAY

Younger populations are the demographic most likely to engage in near-future, longer-term travel, and therefore may be a key audience to focus on in 2021. As Canadians are not travelling internationally, building back confidence in inter-provincial travel will continue to be paramount in the coming months. Provinces can monitor the success of the ArriveCAN program and potentially develop similar inter-provincial programs to increase positive sentiment towards domestic travel.

GLOBAL

- In a study conducted by travel portal eDreams Odigeo with 10,000 people from the United Kingdom, United States, Spain, Germany, France, Italy, Portugal and Sweden were interviewed, 35.2% of all respondents said that they do not feel safe travelling at this time¹²
- People aged 35 and over are most likely to avoid vacation plans (35.6%) whereas 53.9% of 18-24-year-old and 48.9% of 25-34-year-olds have full confidence in the effectiveness of the general safety measures and hygiene regulations and are open to planning travel in the longer-term; generally, the hope for long (vs. short) vacations is increasing, but respondents are still cautious when it comes to planning their vacation and prefer short trips (28%) and last-minute bookings (41.8%)¹³

CANADA

- As of November 21, 2020, air travellers whose final destination is Canada have been submitting their COVID-19 information through ArriveCAN before they board their flight; ArriveCAN creates a secure and user-friendly way to help travellers comply with border and health measures and is available as a mobile app or by signing in online¹⁴
- Thus, Canadian travellers (and those conducting essential travel to Canada) are becoming accustomed to sharing travel and contact information, quarantine plans (unless exempted under conditions set out in the Mandatory Isolation Order), and COVID-19 symptom self-assessments; travellers who do not submit the required information digitally before boarding their flight could be subject to enforcement action, which can range from verbal warnings to \$1,000 fines¹⁵

AVIATION

KEY TAKEAWAY

As countries around the world work to overcome the COVID-19 pandemic and restart their economies and tourism, they all face the challenge of how to reopen their borders and allow international travel to resume while protecting their populations' health. The current patchwork of policies and ever-changing border entry and health screening requirements has made international travel more complex, leaving airlines and border agencies uncertain about the validity of test results and passengers unsure of what is being asked of them. Emerging programs like the World Economic Forum's (WEF) CommonPass Program or China's QR code-based global travel system represent the opportunity to develop and launch standard global models to enable people to securely document and present their COVID-19 status (either as test results or an eventual vaccination status) to facilitate international travel and border crossing while keeping their health information private. Recognizing that countries will make sovereign decisions on border entry and health screening requirements, including whether or not to require tests or what type of test to require, these programs can serve as a neutral platform which creates the interoperability needed for the various 'travel bubbles' to connect and for countries to trust one another's data by leveraging global standards.

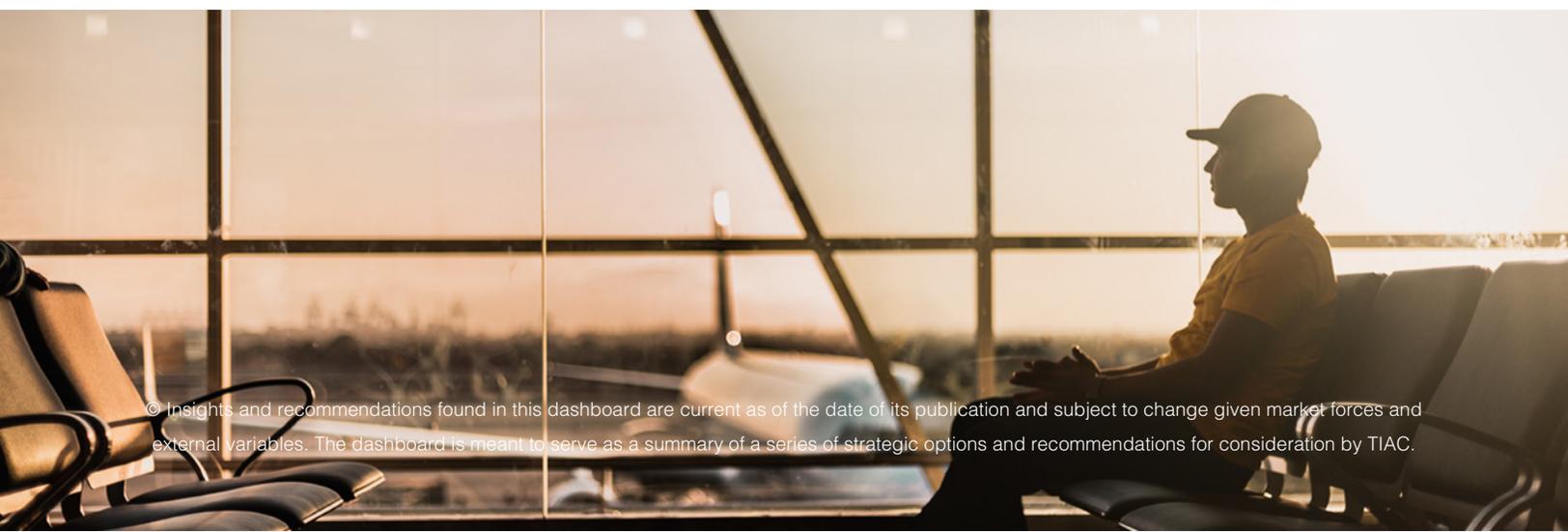
In this section, we present the latest updates from the top airlines in Canada, the U.S., and key Canadian global source markets.

Airline	Key Updates
CANADA	
Air Canada	In partnership with Shoppers Drug Mart, Air Canada is now offering pre-flight rapid COVID-19 tests in Ontario, Alberta and British Columbia. ¹⁶
WestJet	WestJet has launched a rapid COVID-19 test at YVR airport. The initiative, dubbed the WestJet-YVR COVID-19 Testing Study, is a collaboration between UBC researchers and Providence Health Care. Sponsored by WestJet and Vancouver Airport Authority, the study is investigating a form of rapid coronavirus testing with the goal of finding safe, efficient methods to use at the YVR Airport. ¹⁷
Air Transat	Air Transat is now offering a brand-new collection of hotels called Out of Office Collection. Designed for travellers who would like to soak up the joys of the South while working, the collection features a range of benefits tailored to the needs of telecommuters and includes more than 30 carefully selected hotels in some of the most popular South destinations for Canadian travellers, namely Cuba, Jamaica, Mexico and the Dominican Republic. ¹⁸

Airline	Key Updates
U.S.	
United	United Airlines has commenced charter flights to send doses of Pfizer and BioNTech's COVID-19 vaccine candidates to prepare for distribution. ¹⁹
Southwest	Southwest reports most travellers are still opting not to fly, and more trips are being cancelled as cases surge in the US. ²⁰
Delta	A surge in Thanksgiving demand taxed Delta's pandemic-era workforce, signalling positive air travel pick up and the need to reconsider current employment pools of qualified pilots. ²¹
American	After furloughing 8,000 flight attendants in October, American Airlines is now facing a shortage. Amid the global pandemic and economic downturn, the airline has struggled to stay afloat without federal aid that ran out on Oct. 1, 2020, however travel demand is increasing and staffing issues are expected to persist throughout the holiday season. ²²
INTERNATIONAL	
Aeromexico	Aeromexico and Delta Air Lines are planning to operate more than 4,300 flights between Mexico and the United States in December. If they manage to do it, the two airlines would have recovered 95% of their 2019 capacity in the transborder market. ²³
Air China	China's air travel industry continues to rebound as pent-up demand during the "golden week" holiday and so-called fly-at-will promotions boosted traffic. The number of air passengers reached 50.32 million in October, bringing it back to 88.3 per cent of the level a year earlier, according to CAAC News, a media outlet run by the Civil Aviation Administration of China. That was an increase from 47.94 million passengers in September. Analysts believe many people grabbed the opportunity to travel during the festive period after months of being stuck at home under coronavirus lockdown – a concept dubbed "revenge travel". ²⁴
Air France-KLM	Air France and KLM have issued updated information for Canadians looking to travel to France and the Netherlands now that non-essential travel to the two countries from Canada is no longer allowed. The new European Union rules, and the steps taken by each of the countries involved, are restricting travel possibilities to France and the Netherlands for all Canadians, who are no longer permitted to enter these countries for non-essential reasons. ²⁵
Air India	Air India announces first direct flight between Bengaluru and San Francisco This would be the first non-stop flight between Bengaluru and the US, connecting the world's two tech hubs – the original Silicon Valley and the Silicon Valley of India. ²⁶

Airline	Key Updates
Alitalia	Delta and Alitalia have launched 'quarantine free' flights from the U.S. to Italy. This is the first open travel corridor between the two continents since COVID rules were introduced. Delta passengers travelling on select flights from Atlanta to Rome will not have to self-isolate if they test negative for COVID-19 three times. ²⁷
British Airways	The London-based airline is selling luxury travel items from its planes, to help would-be passengers recreate their own first-class experience at home amid a strange time for the airline industry – and particularly for UK-bound flights, as the country undergoes its second lockdown during the pandemic. ²⁸
China Eastern	China Eastern has gradually filed planned international operations, scheduled until the end of December. Various travel restrictions and CAAC's latest policies continue to impact the airline's operation, which may lead to additional last-minute changes, including additional routes/frequencies restoration. ²⁹
China Southern	China Southern returned to profitability in Q3 on the back of a strong domestic market. The airline saw a \$164 million (CNY1.1bn) profit, while revenue dropped by nearly 40%. Domestic flights have returned to 2019 levels in China, greatly boosting airline revenues. The numbers come just days after the airline once again became the biggest in the world. ³⁰
Emirates	Emirates reports having processed refunds worth AED 6.3 billion (\$1.7 billion) since April, during aviation's worst-ever year. The amount is split between a staggering 1.7 million refunds, meaning that the average refund amount is roughly \$1,000. ³¹
Etihad	After a slower than expected demand in air travel following a second wave of the deadly COVID-19 medical emergency, Etihad Airways has decided to ground its Airbus A380 fleet indefinitely. Simultaneously, as the superjumbos announcement on Wednesday, the Abu Dhabi-based airline also warned cabin crew in an internal memo that there would be layoffs soon. ³²
Lufthansa	German flag carrier Lufthansa is set to operate its first-ever 100% carbon neutral cargo flight on Sunday. The flight will be performed by a Boeing 777F aircraft and will travel to Shanghai and back from the airline's main Frankfurt hub. ³³
Japan Airlines	A Japanese government advisor has suggested that ANA and Japan Airlines should consider merging as the crisis continues. With both carriers needing government aid in the coming months, it might make sense for them to merge. ³⁴
Korean Air	Korean Air has announced that it is set to spend 1.8 trillion won, or \$1.62 billion, on acquiring rival carrier Asiana Airlines. The deal, if approved, will see the South Korean flag carrier become the largest shareholder of Asiana and the world's 15th largest airline by distance flown. This will likely come as some relief for Asiana, which has been looking for a buyer to relieve it from its growing debt. ³⁵

Airline	Key Updates
Qantas	Qantas CEO Alan Joyce announced passengers on future Qantas international services will need to be vaccinated against COVID-19. Previously, Alan Joyce has said he doesn't expect Qantas to resume any significant long-haul international flying before a vaccine comes to market. Now, he's suggesting a no job, no fly rule on future Qantas international flights. ³⁶
Ryanair	Ryanair CEO Michael O'Leary believes his airline will emerge from COVID as the lowest cost carrier in Europe. He says that easyJet will no longer be a low-cost at all, and that close competitor Wizz Air will emerge as the second cheapest, but that the gap between Wizz and Ryanair will materially widen as a result of COVID-19 and the way Ryanair has managed their way through the crisis. ³⁷
Qatar	Qatar Airways announced that it had confirmed a codeshare agreement with Air Canada. The terms are applicable for travel between Doha and Toronto and will begin on December 15, 2020. The agreement shows its commitment to serving Canadian traveller and aspirations to boost Canada's global connectivity to assist with the recovery of tourism and business. ³⁸



ACCOMMODATION & EVENTS

KEY TAKEAWAY

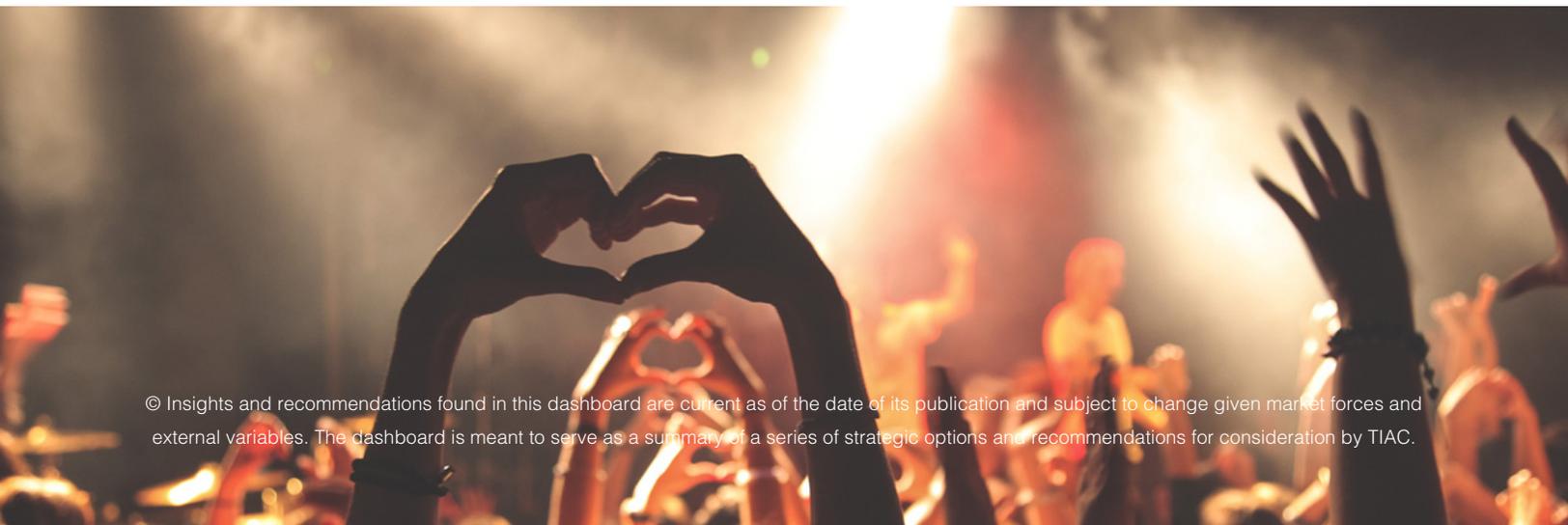
Uncertainty remains in all markets. However, the opportunity for destinations to connect with planners remains, as researching new destinations and being up to date on safety and restrictions is important to all planners in all markets. Partnerships between destinations and organizations have room to grow. Venue business models can be adapted as the ratio of rooms to meeting space is no longer feasible, and hybrid packages offering technology and production elements inspire new ways to host events.

GLOBAL

- A November poll conducted of Global Business Travel Association (GBTA) members, non-members worldwide, corporate travel managers and travel suppliers indicated that 58% of respondents support exempting business trips from mandatory quarantines ³⁹
- With positive vaccine news, many global travel managers expect to allow business travel and in-person meetings at some point next year ⁴⁰

CANADA

- Events that are still in the process of being rescheduled are now being moved to 2021; a large percentage of business events (43%) being moved to later dates (Q1-Q3 2022) ⁴¹
- As previously scheduled events are being rebooked, there is a shift towards researching new destinations for future events and sourcing RFPs; this is a signal that Canada needs to continue marketing efforts to stay top of mind ⁴²



CRUISE

KEY TAKEAWAY

In anticipation of the cruise ban being lifted, most cruise lines, such as Carnival Cruise Line, Norwegian Cruise Line, Royal Caribbean, MSC Cruises, Disney Cruise Line, Bahamas Paradise Cruise, and Virgin Voyage had already been working diligently to meet the new protocols set in place. Although cruising was shut down in the United States, some European cruise lines still continued to sail. The success of AIDA, Costa, Hurtigruten, Hapag-Lloyd Cruises, MSC, and TUI ships which all followed the guidance of the European Union's Healthy Gateways panel have proved that cruising can be done safely and can be seen as thought leaders in the post-COVID cruise industry.

GLOBAL

- The U.S. Centers for Disease Control and Prevention (CDC) has lifted a seven-month ban on cruising in U.S. waters; the federal agency outlined a broad plan for the phased resumption of cruise ship operations with a focus on a gradual approach that acknowledges COVID-19 is still spreading around the world, the risk of contracting the virus due to the population density on ships, and concerns that disembarking passengers and crew may place others at risk when they return home ⁴³
- Norwegian Cruise Line has launched its new global brand campaign "Break Free" which encourages travellers to look beyond the confines of 2020 and towards a future when they can reconnect with the people and places they have missed most; the campaign will run across print, digital, radio and television, marking Norwegian's return to the mass media marketplace since March ⁴⁴

CANADA

- Cruise the Great Lakes, a coalition of states, Canadian provinces, cruise lines, ports, and convention/visitor bureaus, has agreed to a pledge that outlines the safety precautions cruise lines will take to keep passengers safe from COVID-19 in 2021 ⁴⁵



MAJOR TOUR OPERATORS

KEY TAKEAWAY

Most Tour Operators plan to resume operations in 2021 – alongside COVID-19 – even if that means lower numbers or lower margins which is an encouraging sign for the resumption of business. Tour Operators are well-positioned to market professional services that help keep travellers safe and provide advocacy to help navigate COVID-related problems and challenges.

GLOBAL

- The United States Tour Operators Association (USTOA) released new findings from a survey of its Tour Operator Active Members about post-COVID 19 plans for recovery and resumption of business; according to the survey, which was conducted in late October with an 88% response rate of USTOA Active Members, two thirds (69%) of respondents say they are confident or highly confident that guest bookings will increase in 2021 and 9 out of 10 members expressed their company's outlook for resumption of business in 2021 as optimistic or cautiously optimistic ⁴⁶
- Christmas ski holidays are in jeopardy as the UK's biggest ski tour operator has cancelled all snow sports holidays to France this December following the news that many French resorts may not be able to open amid coronavirus restrictions ⁴⁷

CANADA

- ACTA held its very first Virtual Travel Summit in November, organized in partnership with several partner sponsors including Air Canada and Manulife; the two-day bilingual virtual summit allowed attendees to update on important critical topics as the travel industry undergoes transformation due to the COVID-19 crisis ⁴⁸
- An emerging travel trend is private group tours, an ideal option for families and friends looking to stay within their social bubble; though certainly not a new offering, private group bookings are booming among Canadian travellers ⁴⁹

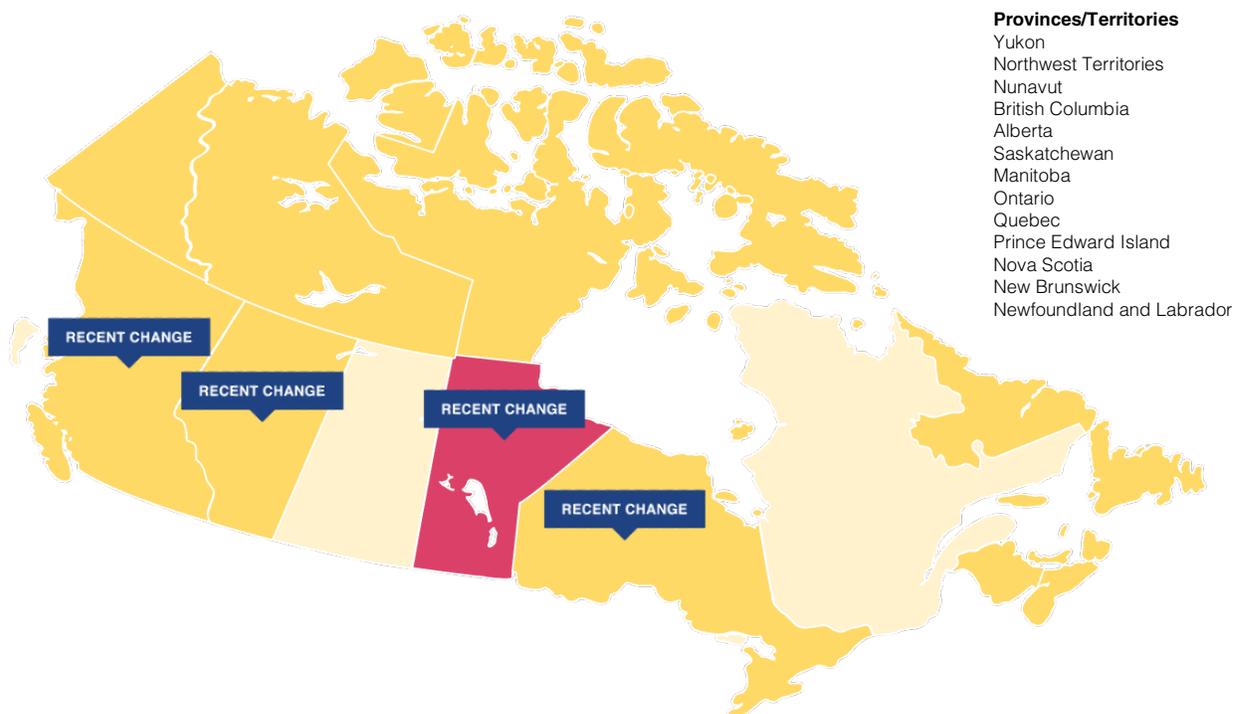
GLOBAL EASING OF TRAVEL RESTRICTIONS (HEAT MAPS)

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 daily.
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 on the provincial, state or country re-opening strategy.



COVID-19 RESTRICTIONS: CANADIAN PROVINCES/TERRITORIES



The top five most populous provinces are summarized in the table below.

Province	T31 Phase	Current Country Phase	Comments
Ontario ⁵⁰	Phase 2	<p>On November 3, 2020, the Government of Ontario released the new <i>COVID-19 Response Framework</i> (“New Framework”), which replaces the previous <i>Framework for Reopening Our Province</i> (“Old Framework”). The New Framework introduces a five-level, colour-coded scheme with clearly defined criteria for each stage. The New Framework took effect in most regions on November 7, 2020 and was fully in force across the province as of November 16, 2020. From least to most restrictive, the framework levels (with descriptions and associated colours) are:</p> <ol style="list-style-type: none"> 1. Prevent (Standard Measures) [GREEN] 2. Protect (Strengthened Measures) [YELLOW] 3. Restrict (Intermediate Measures) [ORANGE] 4. Control (Stringent Measures) [RED] 5. Lockdown (Maximum Measures) [GREY] 	As of November 20, Toronto and Peel Region are under “lockdown”, with the balance of the province under “Control, Restrict and Protect.” Small areas of northern and southern Ontario are in “Prevent.”
Quebec ⁵¹	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;</p>	Quebec is in its final stage of deconfinement yet has extended red-zone restrictions (non-essential activities prohibited) in Montreal, Quebec City and Chaudière-Appalaches until January 2021.

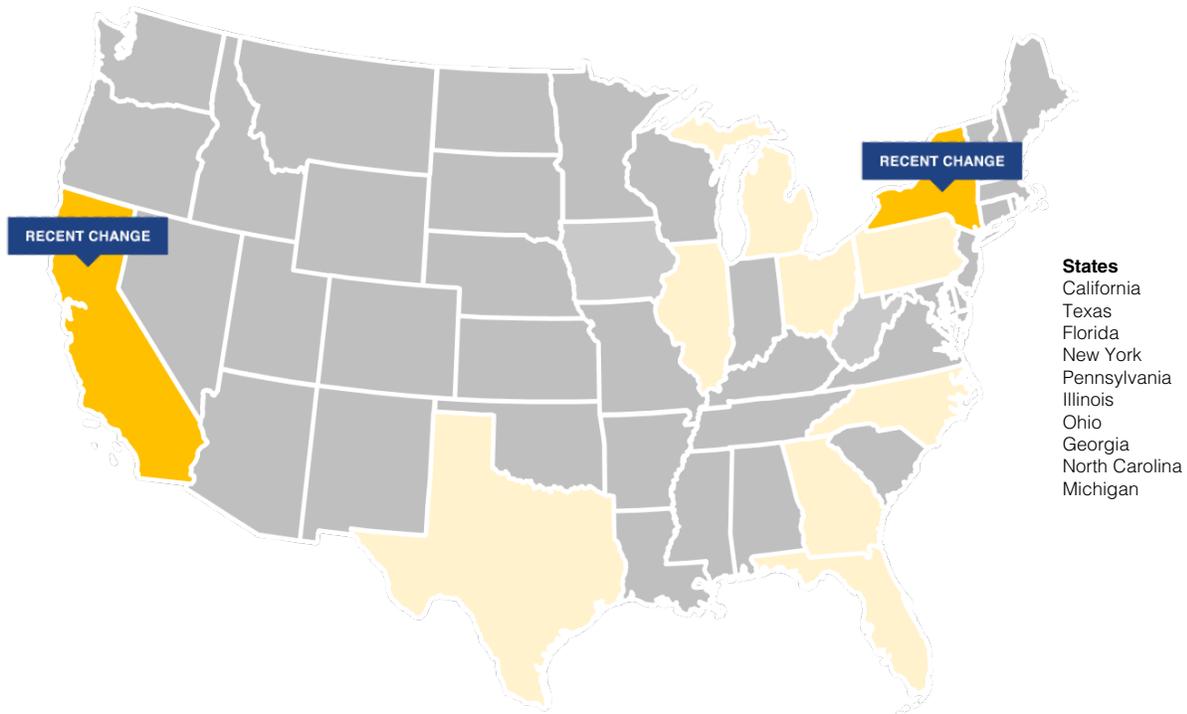
Province	T31 Phase	Current Country Phase	Comments
		shopping centres; accommodation, camping establishments, and targeted tourist activities. PHASE 6 (June 25): Days camps; outdoor swimming pools; restaurants; shopping centres. Tourism businesses and establishments and festival and event promoters are authorized to resume their activities subject to compliance guidelines	
British Columbia ⁵²	Phase 2	PHASE 1 (May 18): Essential travel only, physical distancing and business closures to help stop the spread of COVID-19 PHASE 2 (June 23): Essential travel only, physical distancing, a restart of many businesses including those that were ordered closed PHASE 3 (June 24): Smart and safe travel within the province, restart of in-person K-12 and post-secondary classes PHASE 4 (Conditional on vaccine): International tourism, a restart of large gatherings including concerts and conferences	The phased approach to BC's Restart Plan is on pause due to province-wide restrictions that have suspended all events, social gatherings, social interactions and non-essential travel until December 7.
Alberta ⁵³	Phase 2	STAGE 1 (May 14): Some reopening of businesses and services, while protecting Albertans. STAGE 2 (June 12): Further reopening of businesses with continued protections in place. Relaxing some public gathering restrictions. STAGE 3 (TBD): Opening all workplaces and relaxing public gathering restrictions.	Alberta is currently in a modified Stage 2 of reopening with Stage 1 restrictions implemented until December 18.
Manitoba ⁵⁴	Phase 1	PHASE 1 (May 4): Priority elective surgeries and diagnostic screening can resume. Numerous non-essential businesses, mainly in retail, are allowed to reopen; however, this measure is optional, and a business may choose not to reopen at this time. 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,	Manitoba is currently in a Phase 4 of reopening yet has implemented temporary CRITICAL response level restrictions province-wide. Travel to and from northern Manitoba is restricted and non-essential travel is discouraged. Gatherings are prohibited and critical

Province	T31 Phase	Current Country Phase	Comments
		<p>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>	retailers may only sell essential items.

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.



The top five Canadian inbound states are summarized in the table below.

State	T31 Phase	Current Country Phase	Comments
California ⁵⁵	Phase 2	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.	The majority of California remains in the “widespread” or purple risk status (meaning most non-essential indoor businesses will remain closed) with new restrictions stopping non-essential activities between 10pm and 5am. Persons arriving in California from other states or countries,

State	T31 Phase	Current Country Phase	Comments
			including returning California residents, must practice 14-day quarantine. Californians are encouraged to stay home or in their region and avoid non-essential travel to other states or countries.
Texas ⁵⁶	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 remains in a modified Phase 3 with many counties operating at 75% capacity, bars re-opening and no current travel restrictions or mandatory quarantine requirements for travellers entering the State. Face coverings are mandated and restrictions on outdoor gatherings over 10 have been imposed.
Florida ⁵⁷	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>	Florida remains in Phase 3 with no travel restrictions in place and businesses, including restaurants and bars, operating at full capacity with limited social distancing protocols.

State	T31 Phase	Current Country Phase	Comments
		PHASE 3 (September 25): Individuals should resume non-essential travel and adhere to CDC guidelines regarding isolation following travel.	
New York ⁵⁸	Phase 2	<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 remain in Phase 4, however new restrictions have been brought back including closure of in-person learning at NYC public schools and significant limits on gatherings and indoor dining. Incoming travellers now need to take a mandatory COVID-19 test or quarantine for 14 days. Travellers from states that are contiguous with New York are exempt from the travel advisory.
Pennsylvania ⁵⁹	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. Visitors traveling from states with "high amounts of COVID-19 cases" are asked to quarantine for 14 days. Travellers over the age of 11 entering Pennsylvania, as well as Pennsylvanians who are returning home from outside the State are required to produce a negative COVID-19 test or place themselves in quarantine for 14 days.

COVID-19 RESTRICTIONS: TOP GLOBAL OUTBOUND MARKETS (EXCLUDING THE U.S. AND CANADA)



The top five Canadian inbound markets are summarized in the table below.

Country	T31 Phase	Current Country Phase	Comments
China	Phase 4	Undefined	Domestic travel within China is being considered, planned, and booked. Notably, Chinese tour operators are mandated to pause selling tours for international destinations.
United Kingdom⁶⁰	Phase 2	<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,</p>	<p>The UK is in the NEXT CHAPTER Phase with new measures. A nationwide lockdown in England has been imposed until, with tighter rules expected into January.</p> <p>Some regions of Scotland have moved into the highest level of lockdown,</p>

Country	T31 Phase	Current Country Phase	Comments
		<p>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> <p>England has developed a travel corridor list to identify where people can travel to England and not self-isolate.</p>	<p>and Wales is coming out of a ‘firebreak’ lockdown across the country.</p> <p>The four UK governments have agreed to ease some restrictions over the Christmas period, including lifting of domestic travel restrictions from December 22 – 28.</p>
France ⁶¹	Phase 2	<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>	<p>Although in Phase 3 of recovery, France remains in a national confinement until December. People travelling to France require a negative result of a test carried out in the 72 hours before departure.</p>
India ⁶²	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</p>	<p>India remains in its Phase 4 of reopening with new laws on mask wearing, night curfews in worst-hit districts and restrictions on gatherings. India has</p>

Country	T31 Phase	Current Country Phase	Comments
		<p>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>	<p>increased its air travel bubble arrangements with 22 countries. While travel restrictions to India have been relaxed, the country's borders are still closed to tourists however foreign officials with business visas are now allowed to enter.</p>
Mexico ⁶³	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> <p>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.</p> <p>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.</p> <p>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.</p> <p>Green: All restrictions will be lifted, and schools may reopen, although sanitary measures must be adhered to.</p>	<p>Currently in its final Phase 3 of reopening. The majority of states are in the orange or yellow code, with most vacation destinations open. The land border is closed for non-essential travel, however people can fly to Mexico without restrictions.</p>

ABOUT

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 the timing of program and recovery activities and messages supporting the Canada Experiences Fund (CEF) and other programs to aid in the recovery of Canada's tourism economy.

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