

STATE OF TOURISM IN CANADA DURING COVID-19

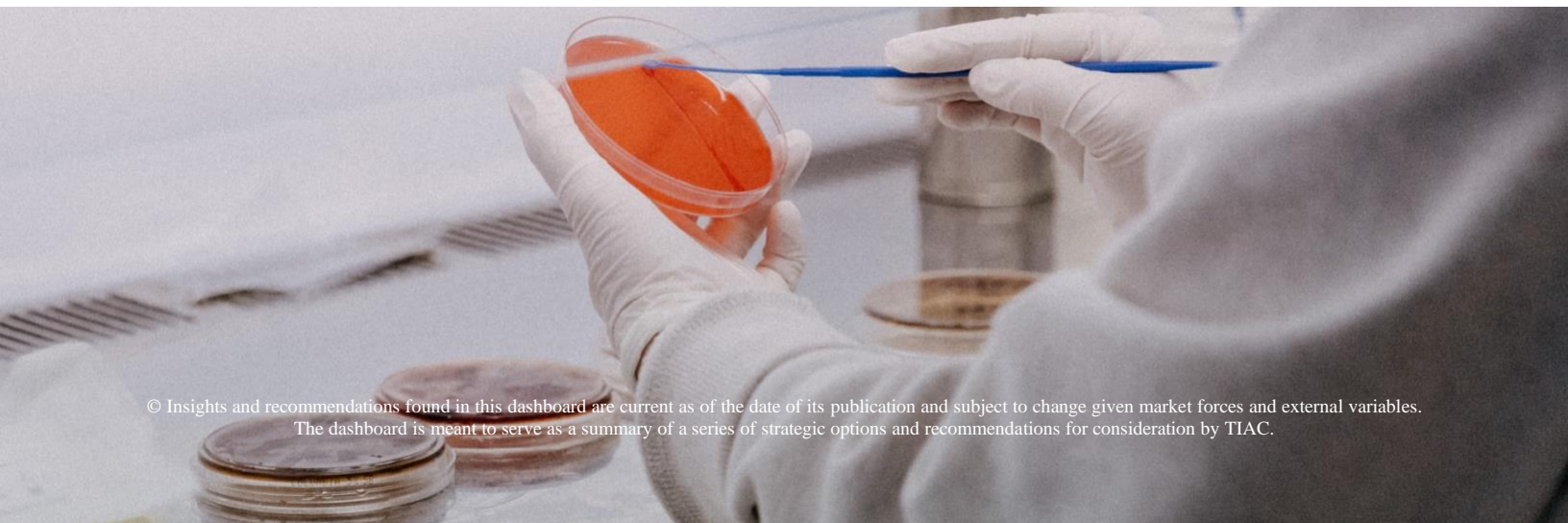
DASHBOARD (2.0) – DEC/JAN 2020

KEY INSIGHTS: TWENTY31

INTERPRETATION OF FINDINGS

GLOBAL

- With some countries experiencing a third wave of the coronavirus, and a new strain of the virus identified and quickly spreading, many governments are issuing new lockdown measures and travel restrictions.
- These travel and border restrictions, including quarantines, are continuing to cause economic challenge and have brought the international tourism industry to a virtual standstill; there is an urgent need to learn to live with the virus with reasonable protective measures and find alternative solutions to enable international travel to resume thus safeguarding the immense economic and social contribution that the tourism industry supports to the global economy.
- The World Health Organization (WHO) has acknowledged that travel bans cannot continue indefinitely; the challenge therefore becomes a practical one related to reopening borders safely in a way which minimizes the risk of international spread.
- In addition to the rollout of vaccines worldwide, more COVID-19 testing at airports could potentially help make travel less restrictive and bring more peace of mind to travellers if pilot programs and studies help prove the measure works.
- The International Air Transport Association (IATA), the trade group for the world's airlines, has argued for governments to implement rapid COVID-19 testing for all international travellers prior to departure, and for a global testing standard so that tests and results are accepted by other jurisdictions along with a more systematic and harmonized approach to contact tracing.
- A number of airports and airlines around the world already offer some kind of airport COVID-19 test; in some cases, testing is mandatory, in other cases a test option is available for a fee.
- Using pilot programs as a launching point, governments can safely reopen borders without quarantine by moving towards consistent implementation of COVID-19 testing procedures.



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CANADA

- Mirroring the global scenario, Canada is responding to record COVID case levels, resulting in a province-wide lockdown in Ontario, stricter measures implemented in Alberta, BC, Manitoba and Quebec, and a border closure still in place until January 21 at a minimum.
- Flights from the UK have been suspended due to the new coronavirus strain, and announcements have been made with respect to newly mandated COVID-19 testing at Canadian borders, a strategy that has been piloted in Calgary, Vancouver and Toronto airports over the past two months with great success.
- Health Canada's approval and initial rollout of the Pfizer's COVID-19 vaccine across the country is seen as a critical milestone for tourism sector recovery.

IMPACT ON CEF PROGRAM:

With COVID-19 cases still on the rise, overall confidence about the safety of local and domestic travel continues to decrease. Most international travel has been further pushed into stand-still due to the emergence of the new coronavirus strain and third wave lockdowns. However, the rollout of vaccines, rapid testing for COVID-19 at airports and a global push for reduced travel quarantines is strengthening the potential for industry recovery in 2021. Until then, many tourism sector businesses will continue to need significant government financial support to avoid insolvency—leading to consolidation in the sector and entailing some degree of permanent capacity loss.



KEY TAKEAWAY SNAPSHOT

01 HEALTH IMPACT

COVID-19 remains a serious global health threat and the situation is evolving daily. Given the number of cases in Canada, the risk to Canadians is considered high. As such, Canada's borders will remain closed until at least January 21, 2021 with new protocols coming into effect that will mandate all air passengers entering the country to provide proof of a negative COVID-19 test. However, the measure will not replace the federal government's mandatory 14-day quarantine period, and testing procedures are yet to be explained. Further testing protocols at land points of entry are also being explored in collaboration with provincial health authorities, but issues of complexity have prevented testing policy implementation thus far.

02 ECONOMIC IMPACT

The pandemic has brought global travel to a halt, grounded many flights, and left seafarers stranded onboard ships for months—leading to disrupted supply chains and fragile economies. Coordinated global action is urgently needed to safely reopen borders and restore the movement of essential goods and workers across the land, air, and sea borders. For global travel and trade to return to pre-pandemic levels safely, travelers, governments, and industries will need a harmonized, standards-based model for health status verification.

03 FOCUS CASE STUDY 1 – THE ALBERTA INTERNATIONAL BORDER TESTING PILOT PROGRAM

Some destinations in Canada are testing the feasibility of a testing upon arrival program to shorten the amount of time travellers need to quarantine once they arrive in the destination. The pilot program being tested in Alberta including the Calgary airport is demonstrating success in the possibility of reducing the amount of time that travellers from outside Canada would need to quarantine. Other provinces are eyeing Alberta's program to test in their own airports.

04 FOCUS CASE STUDY 2 – WESTJET-YVR COVID-19 TESTING STUDY

Destinations are tracking research that is being conducted by the University of British Columbia, Providence Health Care, WestJet and the Vancouver Airport Authority to investigate a method of oral rinse rapid-testing for COVID-19 to inform the safest and most effective way of testing departing

passengers prior to security screening at Vancouver International Airport (YVR). This approach is yet another way that some destinations are re-thinking travel during COVID-19.

05 FOCUS CASE STUDY 3 – TORONTO'S PEARSON INTERNATIONAL COVID-19 TESTING PROJECT

A recent academic study conducted by McMaster HealthLabs (MHL) in collaboration with Air Canada, the Canadian government and Toronto's Pearson International Airport focussed on testing arriving international travellers with a gold standard PCR test that issues results within 48 hours. Preliminary results off the study demonstrate 70% of infected passengers would be detected on arrival.

06 CANADIAN RESIDENT SENTIMENT TOWARD TOURISM

With rising COVID-19 cases, Canadians are feeling less safe to travel close to home and within their own provinces compared to November. With the distribution of the vaccine now underway, tourism recovery is expected to commence along with lifted public health measures and a broader economic rebound. The experience of the global pandemic will reshape both domestic and international travel patterns and preferences, with the expectation that traveller confidence will remain subdued for at least the next two years. Tourism recovery at the provincial level will depend on how well COVID-19 is contained locally and how reliant each province is on international visitors.

07 TRAVELLER BEHAVIOURS

Extended scenarios for 2021–2024 developed by the United Nations World Tourism Organization (UNWTO) point to a rebound in international tourism by the second half of 2021, however a return to 2019 levels in terms of international arrivals could take two to four years with traveller confidence remaining at a record all time low due to slow virus containment and travel restrictions. Domestic demand is expected to recover faster than international demand, and thus remains the focus for recovery efforts.

08 AVIATION

International air travel remains more than 90% down compared to 2019 levels as a result of travel restrictions, leading to huge job losses across the global economy. The aviation industry is calling for consultation with governments and a coordinated COVID-19 testing approach. The utilization of testing is seen as a major element of the path forward to save the aviation industry and protect public health.

09 ACCOMMODATION & EVENTS

The pursuit of risk-based and data-driven approaches to COVID-19 testing is key to obviate the need for quarantines and travel bans that are decimating the accommodation and events industry locally, and worldwide. Establishing common criteria and thresholds for determining epidemiological risk, implementing common protocols to best mitigate risk, and implementing comprehensive, cost-effective pre-departure testing procedures and contact tracing protocols are widely seen by industry members as viable alternatives to automated quarantines.

10 CRUISE

As the world continues to address the challenges regarding COVID-19, the top priority for the entire cruise community, including cruise lines, travel agents, ports, destinations and suppliers, continues to be the health and safety of passengers, crew and the communities they visit with a focus on benefiting from the guidance of national authorities in regions where cruising has started to resume—particularly Europe and parts of the South Pacific.

11 MAJOR TOUR OPERATORS

Innovative travel safety initiatives are emerging, giving rise to a new shape in the tourism sector. However, many countries around the world are still extremely cautious about easing travel restrictions—especially in light of the new strain of COVID-19. Staying up to date with the latest information, and supporting advocacy campaigns will be paramount heading into 2021.

OVERVIEW

HEALTH IMPACT

KEY TAKEAWAY

COVID-19 remains a serious global health threat and the situation is evolving daily. Given the number of cases in Canada, the risk to Canadians is considered high. As such, Canada's borders will remain closed until at least January 21, 2021 with new protocols coming into effect that will mandate all air passengers entering the country to provide proof of a negative COVID-19 test. However, the measure will not replace the federal government's mandatory 14-day quarantine period, and testing procedures are yet to be explained. Further testing protocols at land points of entry are also being explored in collaboration with provincial health authorities, but issues of complexity have prevented testing policy implementation thus far.

GLOBAL

- Confirmed deaths with COVID-19 surpassed 1.8 million globally, while worldwide cases climbed above 83 million with over 58 million recoveries¹
- World Health Organization experts have warned that even though the coronavirus pandemic has been very severe, it is "not necessarily the big one" and that the destiny of the virus is to become endemic, even as vaccines begin to be rolled out²

CANADA

- As of December 29, there have been a total of 565,506 confirmed cases and 15,387 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 January 21⁴

ECONOMIC IMPACT

KEY TAKEAWAY

The pandemic has brought global travel to a halt, grounded many flights, and left seafarers stranded onboard ships for months—leading to disrupted supply chains and fragile economies. Coordinated global action is urgently needed to safely reopen borders and restore the movement of essential goods and workers across the land, air, and sea borders. For global travel and trade to return to pre-pandemic levels safely, travelers, governments, and industries will need a harmonized, standards-based model for health status verification.

GLOBAL

- The estimated decline in international tourism in 2020 is equivalent to a loss of about 1 billion arrivals and US\$ 1.1 trillion in international tourism receipts; this plunge in international tourism could result in an estimated economic loss of over US\$ 2 trillion in global GDP, more than 2% of the world's GDP in 2019⁵
- Looking ahead, the announcement and the roll-out of vaccines are expected to gradually increase consumer confidence and contribute to ease travel restrictions; UNWTO's extended scenarios for 2021-2024 point to a rebound in international tourism by the second half of 2021—nonetheless, a return to 2019 levels in terms of international arrivals could take 2½ to 4 years⁶

CANADA

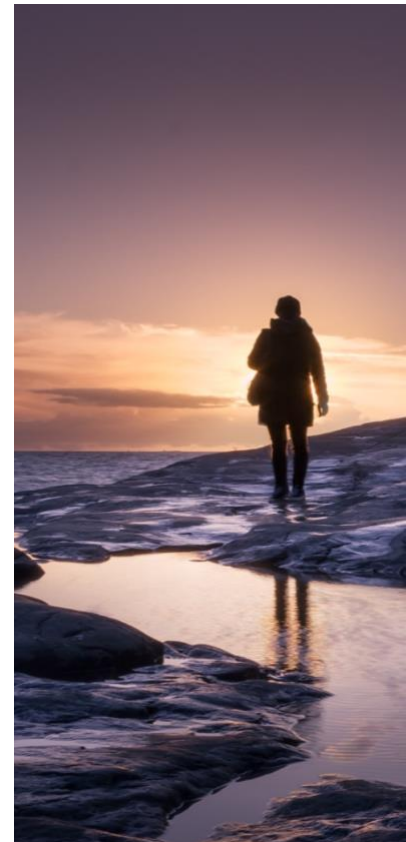
- COVID-19 hit the Canadian tourism sector harder than any other; its contraction in the second quarter of 2020 was six times larger than the economy's as a whole⁷
- Many small and medium-sized businesses in the tourism industry face the threat of insolvency; this may lead to consolidation in the sector and will entail some degree of permanent capacity loss⁸

FOCUS CASE STUDY 1: THE ALBERTA INTERNATIONAL BORDER TESTING PILOT PROGRAM⁹

KEY TAKEAWAY

Some destination in Canada are testing the feasibility of a testing upon arrival program to shorten the amount of time travellers need to quarantine once they arrive in the destination. The pilot program being tested in Alberta, including the Calgary Airport is seeing some positive indicators of success in the potential to reduce the amount of time that travellers from outside Canada would need to quarantine. Other provinces are eyeing Alberta's program as a possible test for their own airports.

- The pilot is a partnership with the Government of Canada and industry to safely explore ways to reduce the length of quarantine for travellers while still protecting Albertans from COVID-19
- Eligible international travellers returning to Alberta at select international airport and border crossings can participate in the Alberta COVID-19 Border Testing Pilot Program
- Participants will be allowed to quarantine for less time if they test negative for COVID-19 and commit to following specific public health and testing measures
- Participants in the pilot must quarantine immediately after arrival until they are notified of their results via text or email, which will typically be available within 48 hours
- Unlike regular international arrivals who are required by law to quarantine for a full 14 days, participants in the program are allowed to leave quarantine if their tests come back negative, provided they follow public health guidelines and make daily check-ins
- They must also take a second test after a week at a participating pharmacy and not leave the province (Alberta) for 14 days after arriving in the country
- There is no cost to participate in the border pilot program; the pilot will run until 52,000 participants are enrolled



FOCUS CASE STUDY 2: VANCOUVER'S WESTJET-YVR COVID-19 TESTING STUDY¹⁰

KEY TAKEAWAY

Destinations are tracking research being conducted by the University of British Columbia, Providence Health Care, WestJet and the Vancouver Airport Authority to investigate a method of oral rinse rapid-testing for COVID-19 to inform the safest and most effective way of testing departing passengers prior to security screening at Vancouver International Airport (YVR). This approach is yet another way that some destinations are re-thinking travel during COVID-19.

- Vancouver's WestJet-YVR COVID-19 Testing Study is open to volunteer WestJet guests on their day of travel who have not tested positive for COVID-19 in the last 90 days, are residents of British Columbia between the ages of 19 and 90, and are departing on a domestic flight
- The test is considered a pre-travel screening test to identify infectious travellers as opposed to a diagnostic test that constitutes a medical diagnosis
- If a rapid test is positive, volunteers will be ineligible to travel and will be required to undergo further Health Canada-approved confirmatory testing to diagnose COVID-19 status; guests will receive information pamphlets with details on when and how to rebook flights at no extra fees
- If a rapid test is negative, volunteers will still need to wear a mask during the flight and comply with all existing COVID-19 requirements
- There is no cost to participate in the study, however volunteers must have a minimum of 75 minutes to conduct the screening prior to departure
- This is the first study of its kind in Canada to investigate a method of COVID-19 rapid antigen testing to help inform the safest and most efficient way of testing departing passengers at YVR
- The study's two key objectives are first, to examine the feasibility of implementing rapid testing at departure sites for airports and second, to test the efficacy of oral rinses as an alternative method of rapid testing

FOCUS CASE STUDY 3: TORONTO'S PEARSON INTERNATIONAL AIRPORT COVID-19 TESTING PROJECT¹¹

KEY TAKEAWAY

A recent academic study conducted by McMaster HealthLabs (MHL) in collaboration with Air Canada, the Canadian government and Toronto's Pearson International Airport focussed on testing arriving international travellers with a gold standard PCR test that issues results within 48 hours. Preliminary results off the study demonstrate 70% of infected passengers would be detected on arrival.

- Toronto's Pearson International Airport carried out its own airport COVID-19 testing project that wrapped up in November
- The test, which was self-administered by the participants and overseen by researchers, used a single nasal and cheek swab instead of the more common (and more uncomfortable) long nasopharyngeal swabs that require healthcare professionals in PPE
- Unlike participants in Alberta's program, Toronto Pearson volunteers were still required to quarantine for the full 14 days regardless of the results since the tests were for research purposes only
- Two more tests were taken at the seven and 14 day mark, with more that 16,000 volunteers and 40,000 tests administered
- Data collection from the tests has completed and researchers are analyzing results
- An interim report based on more than 20,000 tests and 8,600 participants arriving in Toronto found that 70% of infected passengers would be detected on arrival, and the bulk of the remaining positive cases would be found in the second test

FOCUS CASE STUDY 4: DIGITAL HEALTH PASSPORT¹²

KEY TAKEAWAY

Digital health passports that integrate testing certificates and vaccine credentials with travel documents are beginning to emerge as the global, standardized solution to the current confusion and complication surrounding international travel. With individual countries creating distinct entry requirements to limit the risk of importing COVID-19, digital platforms may improve reliability in testing and adherence to government health regulations as a necessary precursor to safe and secure travel without quarantine measures.

- Travel body IATA (International Air Transport Association), which represents approximately 290 airlines comprising 82% of global air traffic, is in final development stages of the Travel Pass initiative, a digital health pass intended to streamline travel across borders in the age of COVID-19
- The Travel Pass is a mobile application designed as a consolidated source of information on travel health requirements including testing certificates and vaccine credentials
- Using IATA Timatic software, a programme currently used by airlines to ensure that travellers are compliant with border rules and regulations, the Travel Pass will compile a registry of health requirements per country, including testing stipulations
- The platform will then point users to certified testing, and eventually, vaccination centres, so that travellers know where to go to get the right kind of service
- The phone-based app will also integrate with laboratory facilities to receive test results and vaccination certificates directly, which travellers can then present to airline personnel and border security
- Finally, IATA's One ID technology will enable users to create a "digital passport" so that health credentials are digitally connected to an individual's travel documents, facilitating seamless travel
- Singapore Airlines is currently conducting a trial of the software on flights from Jakarta and Kuala Lumpur to Singapore, where a negative Covid-19 test is required prior to arrival
- Passengers who test at one of 12 designated facilities are presented with a QR code to scan at the airport during check-in, creating an efficient pathway to proof of results from trusted testing centers
- If successful, the airline plans to expand the programme, integrating it with the Singapore Air app by mid-2021, and IATA has stated that the Travel Pass will also be trialled by British Airways
- Slated for full launch on Apple and Android in Q1, 2021, IATA's Travel Pass will join the rush for tech-based solutions to solve the challenge of pandemic-era international travel

CANADIAN RESIDENT SENTIMENT TOWARD TOURISM WITHIN CANADA AND TOWARDS THE U.S. AND OTHER COUNTRIES¹³

KEY TAKEAWAY

With rising COVID cases, Canadians are feeling less safe to travel close to home and within their own provinces compared to November. With the distribution of the vaccine now underway, tourism recovery is expected to commence along with lifted public health measures and a broader economic rebound. The experience of the global pandemic will reshape both domestic and international travel patterns and preferences, with the expectation that traveller confidence will remain subdued for at least the next two years. Tourism recovery at the provincial level will depend on how well COVID-19 is contained locally and how reliant each province is on international visitors.

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%	81%	61%	68%	61%	61%
I feel safe to travel to communities in my province	64%	66%	46%	54%	55%	49%
I feel safe to travel to other provinces in Canada	51%	21%	20%	33%	38%	31%
I feel safe to travel to the United States	17%	7%	11%	9%	14%	11%
I feel safe to travel internationally	17%	8%	12%	11%	16%	12%

■ Majority positive sentiment
 ■ Majority negative sentiment
 ■ Neutral

TRAVELLER BEHAVIOURS

KEY TAKEAWAY

Extended scenarios for 2021–2024 developed by the United Nations World Tourism Organization (UNWTO) point to a rebound in international tourism by the second half of 2021, however a return to 2019 levels in terms of international arrivals could take two to four years with traveller confidence remaining at a record all time low due to slow virus containment and travel restrictions. Domestic demand is expected to recover faster than international demand, and thus remains the focus for recovery efforts.

GLOBAL

- Asia and the Pacific saw an 82% decrease in arrivals in January-October 2020, the Middle East recorded a 73% decline, while Africa saw a 69% drop this ten-month period; international arrivals in both Europe and the Americas declined by 68%¹⁴
- Data on international tourism expenditure continues to reflect very weak demand for outbound travel, however some large markets such as the United States, Germany and France have shown some shy signs of recovery in the recent months¹⁵
- While demand for international travel remains subdued, domestic tourism continues to grow in several large markets such as China and Russia, where domestic air travel demand has mostly returned to pre-COVID levels¹⁶

CANADA

- Based on the assumption of a gradual reversal of the pandemic, the roll out of the COVID-19 vaccine, testing at airports and lifting of travel restrictions, significant improvement in traveller confidence is anticipated for the middle of 2021¹⁷
- The expected rebound is also a consequence of the large pent-up demand after months of closed borders and travel bans¹⁸
- The rebound is expected to continue in 2022 as travel conditions normalize and the pandemic is contained globally¹⁹

AVIATION

KEY TAKEAWAY

International air travel remains more than 90% down compared to 2019 levels as a result of travel restrictions, leading to huge job losses across the global economy. The aviation industry is calling for consultation with governments and a coordinated COVID-19 testing approach. The utilization of testing is seen as a major element of the path forward to save the aviation industry and protect public health.

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	Air Canada has suspended all flights from London until January 6 th , 2021 due to a directive from the Government of Canada to suspend all direct passenger flights from the UK to Canada. ²⁰
WestJet	Due to the COVID-19 virus variant and further lockdowns in the UK, WestJet has cancelled all inbound and outbound flights to London. ²¹
Air Transat	Air Transat has announced that it expects the carrier's acquisition by Air Canada to be completed by February. ²²
U.S.	
United	United Airlines has announced that it is working with the CDC to roll out a new passenger contact tracing program. ²³
Southwest	Southwest reports that it doesn't expect any furloughs or pay cuts in 2021. ²⁴
Delta	The Atlanta-based carrier is facing another blow as hundreds of flights were cancelled over the holiday season amid harsh weather and the continuing global health crisis. ²⁵
American	The airline has signalled that if the vaccine rollout is successful, masks may be less of a requirement by the summer of 2021. ²⁶
INTERNATIONAL	
Aero-mexico	Aeromexico is attempting to reduce its workforce by at least 15% by furloughing 2,596 workers. ²⁷

Airline	Key Updates
Air China	According to the latest notice issued by the Embassy of the People's Republic of China in Canada, starting from December 1, 2020, Chinese and foreign passengers who are to fly from Canada to China will be required to take nucleic acid and IgM anti-body tests, and apply for a QR code with a "HS" (Chinese passengers) or "HDC" (foreign passengers) mark from the Chinese Embassy or Consulate General in Canada within two days before boarding. ²⁸
Air France-KLM	Air France is following new conditions of entry or transit in France and Overseas Territories which concerns the acceptance of antigenic tests, which must now enable the detection of N protein of SARS-CoV-2. ²⁹
Air India	Due to the new COVID strain in the UK, Air India is offering free rescheduling for all passengers who booked over the holiday season that have had their flights postponed. ³⁰
Alitalia	Alitalia is offering quarantine-free flights between New York and Italy for passengers presenting a negative COVID-19 test taken within 48 hours of departure. ³¹
British Airways	The London-based airline is trimming its route network for the summer of 2021. ³²
China Eastern	China Eastern stocks have surged as a result of promising COVID-19 vaccine trials. ³³
China Southern	A Negative Certificate of COVID-19 Nucleic Acid Test must be presented to board all China Southern flights. ³⁴
Emirates	With tourism open since early July, Emirates is preparing to handle a surge in traveller numbers in the new year. ³⁵
Etihad	Etihad Airways has temporarily suspended flights from Saudi Arabia amid fears of a new strain of COVID-19. ³⁶
Lufthansa	German flag carrier Lufthansa is introducing flights for which the entire crew and all passengers are tested for COVID-19 free of charge. ³⁷
Japan Airlines	The Government of Japan has announced the suspension of the Phased Measure for Resuming Cross-Border Travel based on the decision on September 25, 2020, which enabled entry into Japan from all countries and regions from October 1, 2020. This suspension will be implemented until the end of January 2021. ³⁸
Korean Air	Korean Air has suspended flights from the UK and are now requiring passengers to submit medical certificates related to negative COVID-19 tests. ³⁹
Qantas	Australian airline Qantas will demand passengers provide proof of COVID-19 vaccination if they want to fly in or out of the country. ⁴⁰
Ryanair	Ryanair is working with the Irish Government to repatriate Irish citizens stuck in Great Britain following new travel bans due to the new strain of COVID-19. ⁴¹
Qatar	Qatar Airways is requiring passengers to present a negative COVID-19 RT-PCR medical test result when checking in. ⁴²

ACCOMMODATION & EVENTS

KEY TAKEAWAY

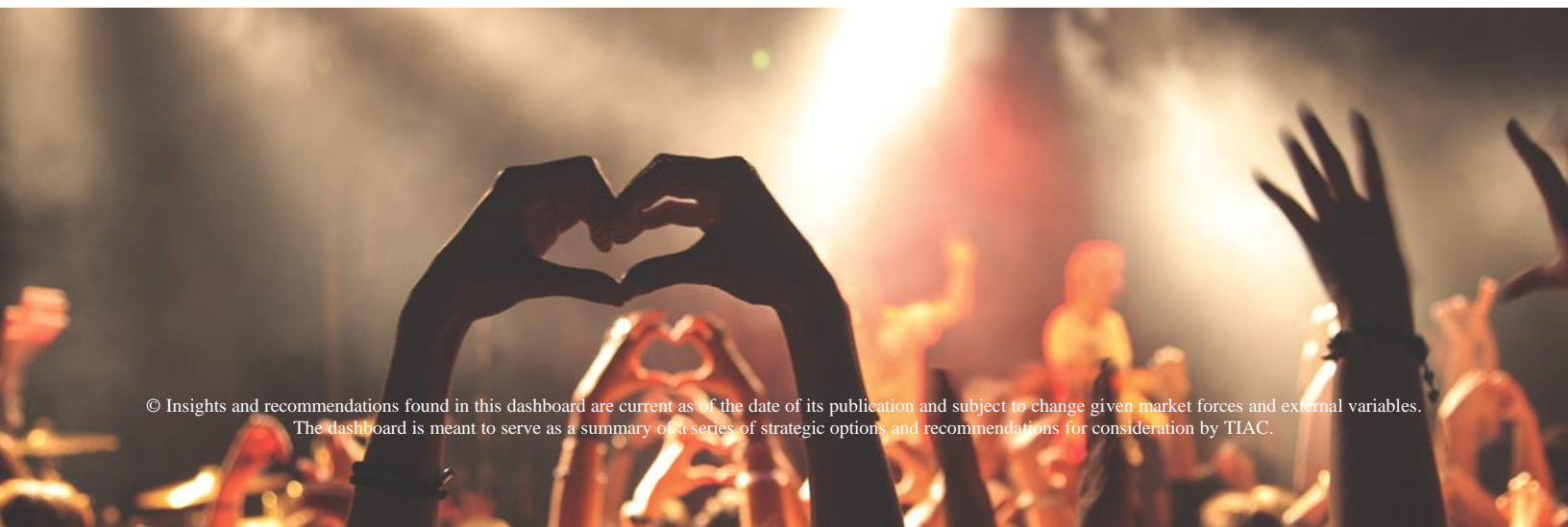
The pursuit of risk-based and data-driven approaches to COVID-19 testing is key to obviate the need for quarantines and travel bans that are decimating the accommodation and events industry locally, and worldwide. Establishing common criteria and thresholds for determining epidemiological risk, implementing common protocols to best mitigate risk, and implementing comprehensive, cost-effective pre-departure testing procedures and contract tracing protocols are widely seen by industry members as viable alternatives to automated quarantines.

GLOBAL

- The Global Business Travel Association (GBTA) has launched a *Ready. Safe. Travel.* initiative to lead the efforts for a safe return to business travel through advocacy, education and awareness⁴³
- The initiative will push government leaders to put in place necessary safety measures and the resources to save jobs and get back on the road to travel; provide member education and training to ensure a safe return to travel; and tell the story of the value of business travel to the world economy and build traveller confidence⁴⁴

CANADA

- UK planners and US associations are looking to hold events closer to home in the near term⁴⁵
- Planners in all markets are committed to having face-to-face events, and want to hear from Canada with relevant information that will make it easier to reschedule events in 2021 and for new events to be researched for 2021 and beyond⁴⁶



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CRUISE

KEY TAKEAWAY

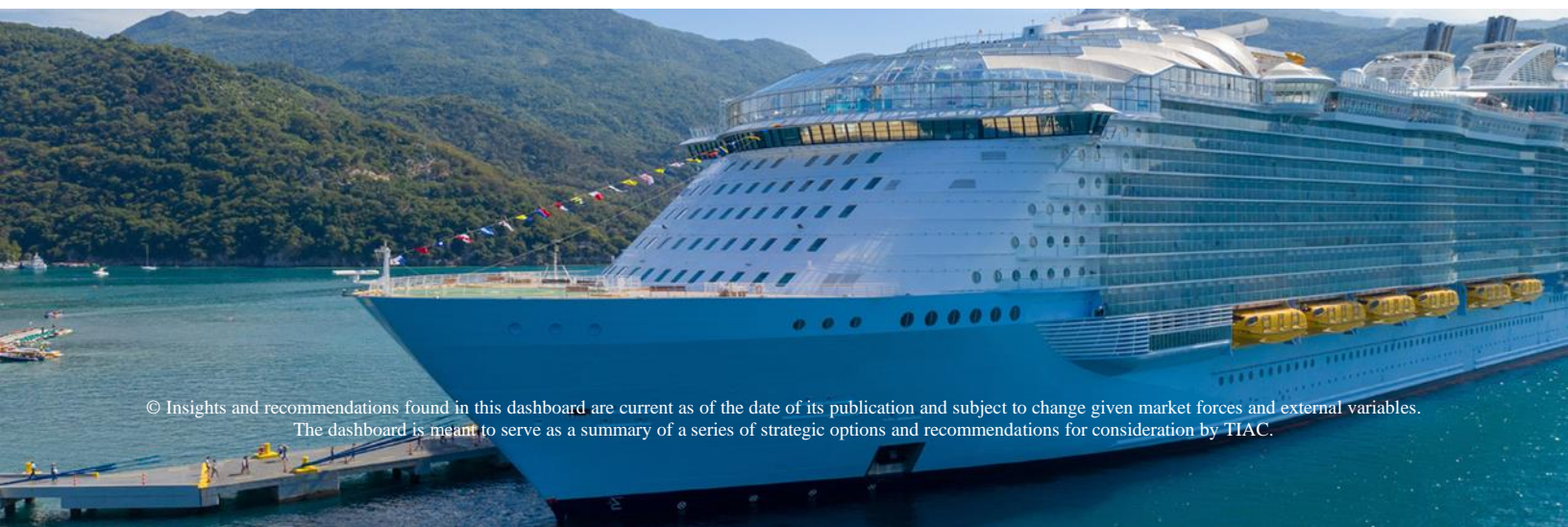
As the world continues to address the challenges regarding COVID-19, the top priority for the entire cruise community, including cruise lines, travel agents, ports, destinations and suppliers, continues to be the health and safety of passengers, crew and the communities they visit with a focus on benefiting from the guidance of national authorities in regions where cruising has started to resume—particularly Europe and parts of the South Pacific.

GLOBAL

- The U.S. Centers for Disease Control and Prevention (CDC) has raised the warning from Level 3 to Level 4 recommending that all people avoid travel on cruise ships, including river cruises, worldwide, because the risk of COVID-19 on cruise ships is very high⁴⁷
- All Cruise Line Industry Association (CLIA) members have agreed to suspend sailings of all ships carrying more than 250 passengers through December 31, 2020; CLIA is also working to establish industry-wide health and safety protocols that its members will agree to abide by⁴⁸

CANADA

- Canada has extended its ban on cruise ships until Feb. 28, 2021; Cruise ships that have overnight accommodations for more than 100 people will not be allowed to operate in Canadian waters during the ban⁴⁹



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MAJOR TOUR OPERATORS

KEY TAKEAWAY

Innovative travel safety initiatives are emerging, giving rise to a new shape in the tourism sector. However, many countries around the world are still extremely cautious about easing travel restrictions— especially in light of the new stain of COVID-19. Staying up to date with the latest information, and supporting advocacy campaigns will be paramount heading into 2021.

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, the half (51%) that did not operate in 2020, a third (31%) of those members say they plan to restart operations before a COVID-19 vaccine is widely available and more than half (54%) remain unsure whether they will operate before or after a vaccine⁵⁰
- Specialist adventure travel operators Undiscovered Destinations have seen a rise in enquiries for some of their most off-the-beaten-path destinations in light of the ongoing Covid-19 pandemic; the intrepid travel experts have seen interest in some of their most extreme destinations more than double over the last month, with a particularly sharp increase in enquiries about Sudan, Haiti, Iraq and Uzbekistan following the news of a vaccination rollout⁵¹

CANADA

- The Association of Canadian Travel Agencies (ACTA) has announced that significant lobbying will need to continue in the coming months while members work through the COVID-19 crisis to ensure Travel Agencies, their employees, and independent contractors are a priority⁵²
- According to research conducted by Sunwing Travel Group, more than half of Canadians want to travel in 2021 with 18-34 year olds representing the most interested demographic⁵³

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 ⁵⁴	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] 	Ontario is currently under a province-wide lockdown scheduled to last until January 23, however it is anticipated that the duration of the measure will be extended.
Quebec ⁵⁵	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>	Quebec is in its final stage of deconfinement yet has extended red-zone restrictions (non-essential activities prohibited) in Montreal, Quebec City, Chaudière-Appalaches and the Outaouais region. Case counts have exceeded 200,000 and the vaccine is beginning to be administered.

Province	T31 Phase	Current Country Phase	Comments
		<p>PHASE 5: Professional and therapeutic health care personal and beauty care services; shopping centres; accommodation, camping establishments, and targeted tourist activities.</p> <p>PHASE 6 (June 25): Days camps; outdoor swimming pools; restaurants; shopping centres. Tourism businesses and establishments and festival and event promoters are authorized to resume their activities subject to compliance guidelines</p>	
British Columbia ⁵⁶	Phase 2	<p>PHASE 1 (May 18): Essential travel only, physical distancing and business closures to help stop the spread of COVID-19</p> <p>PHASE 2 (June 23): Essential travel only, physical distancing, a restart of many businesses including those that were ordered closed</p> <p>PHASE 3 (June 24): Smart and safe travel within the province, restart of in-person K-12 and post-secondary classes</p> <p>PHASE 4 (Conditional on vaccine): International tourism, a restart of large gatherings including concerts and conferences</p>	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 January 8. Vaccines are beginning to be administered.
Alberta ⁵⁷	Phase 2	<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 a modified Stage 2 of reopening with Stage 1 restrictions implemented until January 12. Vaccines are beginning to be administered.
Manitoba ⁵⁸	Phase 1	<p>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.</p> <p>PHASE 2 (June 1): Restoring of outdoor drive-in events, childcare services, schools</p>	Manitoba is currently in a Phase 4 of reopening yet has extended temporary CRITICAL response level restrictions province-wide until January 8. Vaccines are beginning to be administered.

Province	T31 Phase	Current Country Phase	Comments
		<p>and day camps; outdoor recreation facilities and golf; travel to northern parks, campgrounds, cabins, lodges, and resorts; bars, beverage rooms, brewpubs, microbreweries, and distilleries.</p> <p>PHASE 3 (June 21): Increasing indoor and outdoor group gathering sizes and permitting larger group gatherings; easing self-isolation and northern travel restrictions on travellers entering Manitoba from Western Canada, the Yukon, the Northwest Territories, Nunavut, and northwestern Ontario; removing occupancy limits for retail businesses, restaurants, bars, beverage rooms, brewpubs, microbreweries, and distilleries; reopening permanent outdoor amusement parks.</p> <p>PHASE 4 (July 25): Phase 3 public health guidance continues to be in effect, including 14-day self-isolation requirements for those traveling into Manitoba from eastern and southern Ontario, Quebec, and Atlantic Canada.</p>	

COVID-19 RESTRICTIONS: TOP 10 MOST POPULATED STATES IN THE US

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

State	T31 Phase	Current Country Phase	Comments
California ⁵⁹	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.	California has issued state-wide travel restrictions and has extended regional stay-at-home orders and for Northern California, the Bay Area, Greater Sacramento, San Joaquin Valley and southern California until January 16 at a minimum. Vaccines are beginning to be administered.
Texas ⁶⁰	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 businesses operating at 75% capacity, however an extended State Disaster Declaration declared in December. Vaccines are beginning to be administered.
Florida ⁶¹	Phase 3	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.	Florida remains in Phase 3 with no travel restrictions in place and businesses, including restaurants and bars,

State	T31 Phase	Current Country Phase	Comments
		<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): Individuals should resume non-essential travel and adhere to CDC guidelines regarding isolation following travel.</p>	operating at full capacity with limited social distancing protocols. Vaccines are beginning to be administered.
New York ⁶²	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 a new Micro-Cluster Strategy has been introduced to address COVID-19 hot spots across the state, along with a Winter Plan to mitigate the spread of the virus and bolster hospital preparedness. Out of state travellers must quarantine for 10 days. Vaccines are beginning to be administered.
Pennsylvania ⁶³	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</p>	Pennsylvania is currently in its green phase of reopening and is set to lift temporary yellow phase restrictions that were imposed over the

State	T31 Phase	Current Country Phase	Comments
		gatherings of more than 25 prohibited; in-person retail allowable, curbside, and delivery preferable; restaurants and bars may open outdoor dining. 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.	holiday season on January 4. Vaccines are beginning to be administered.

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 ⁶⁴	Phase 4	Undefined	China is currently closed for most foreign visitors, with suspended visas and entry restrictions of foreign nationals. Anyone granted entry must quarantine for 14-21 days and take multiple COVID-19 tests. A vaccine has been approved with 1 million doses already administered.
United Kingdom ⁶⁵	Phase 2	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 STEP 2 (June 1): Allows people to leave the house for any reason. Up to six people from	With a new variant of coronavirus circulating, more than three quarters of England is now under the strictest tier four coronavirus measures. Other parts of the country have also joined higher

Country	T31 Phase	Current Country Phase	Comments
		<p>different households were allowed to meet outside, in both parks and private gardens, provided they observe social distancing rules; closed shops would reopen from 15 June.</p> <p>STEP 3 (July 4): Pubs, restaurants, and hairdressers can open with social distancing measures in place. Two households can meet indoors with social distancing in place. Hotels, camping, and other accommodation sites can reopen. Other facilities including outdoor gyms, museums and galleries, cinemas, places of worship, community centres, and libraries can also reopen.</p> <p>'NEXT CHAPTER': As of August 1, government guidance no longer encouraged people to work from home, and employers were given more discretion about whether to re-open their workplaces.</p> <p>England has developed a travel corridor list to identify where people can travel to England and not self-isolate.</p>	<p>tiers, to curb the spread of a new variant of Covid-19. Mainland Scotland, Northern Ireland and Wales are under lockdown. Vaccines are beginning to be administered.</p>
France ⁶⁶	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 has entered its third coronavirus wave and has replaced a nation-wide lockdown with a curfew of 6pm. Vaccines are beginning to be administered.</p>
India ⁶⁷	Phase 4	<p>PHASE 1 (June 8): Places of worship, malls, and restaurants will now be permitted to reopen in most parts of the country.</p> <p>PHASE 2 (July 1): Domestic flights and train operation times to be expanded; Curfew will be enforced from 10 p.m. to 5 a.m.; Shops</p>	<p>India remains in its Phase 4 of reopening with night curfews expected to lift January 1 due to recent downtrends in cases, yet restrictions on indoor and</p>

Country	T31 Phase	Current Country Phase	Comments
		<p>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>outdoor gatherings remain in place. Vaccines are expected to rollout in January.</p>
Mexico⁶⁸	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, Mexico has introduced new restrictions including the ban of all non-essential activities in Mexico City and surrounding areas. Vaccine rollout has begun – the first Latin American country to do so.</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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