

COVID-19 Tourism Impact Update



Falkland Islands Tourism Sector Information and Guidance Concerning the Impact of COVID-19

No. 8
July 17th 2020

INTRODUCTION

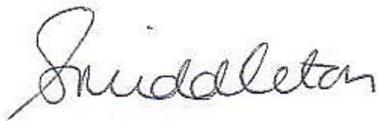
We are now entering a period in which many countries have set out their stalls with regards to who and how they allow tourists to visit. Typically this boils down to a list of low, medium and high risk countries, and the requirements of visitors is different depending on which list they fall into. Most island destinations like the Falklands are requiring some form of pre-online registration and a COVID-19 test around 3 days before travel.

Of course, opening borders does not necessarily equate to visitors arriving in the numbers they did previously. Many potential travellers have written 2020 off as a bad year, and will try again in 2021. Others are keen to try to restore normality and enjoy themselves after weeks of lockdown. Also, there's the issue of transport. Airlines are now starting to resume flights but not to all destinations, and some remain closed, significantly for the Falklands, these include Brazil and Chile.

Finally, whilst there is considerable optimism in Europe, and many other countries around the world, that the worst is over, there are some countries (and they happen to be the ones with vast populations) such as the USA, Brazil, India and Russia that are still to experience the worst of the pandemic.

Once again, we hope this *COVID-19 Tourism Impact Update* provides some of the facts with regards to how the tourism sector is being affected worldwide, how it is responding, and what it might all mean for us in the Falkland Islands.

As always, please don't hesitate to contact the Falkland Islands Tourist Board for more details or any further assistance.



Stephanie Middleton

Executive Director

17th July 2020

Next Update: Friday 31st July 2020

CURRENT SITUATION

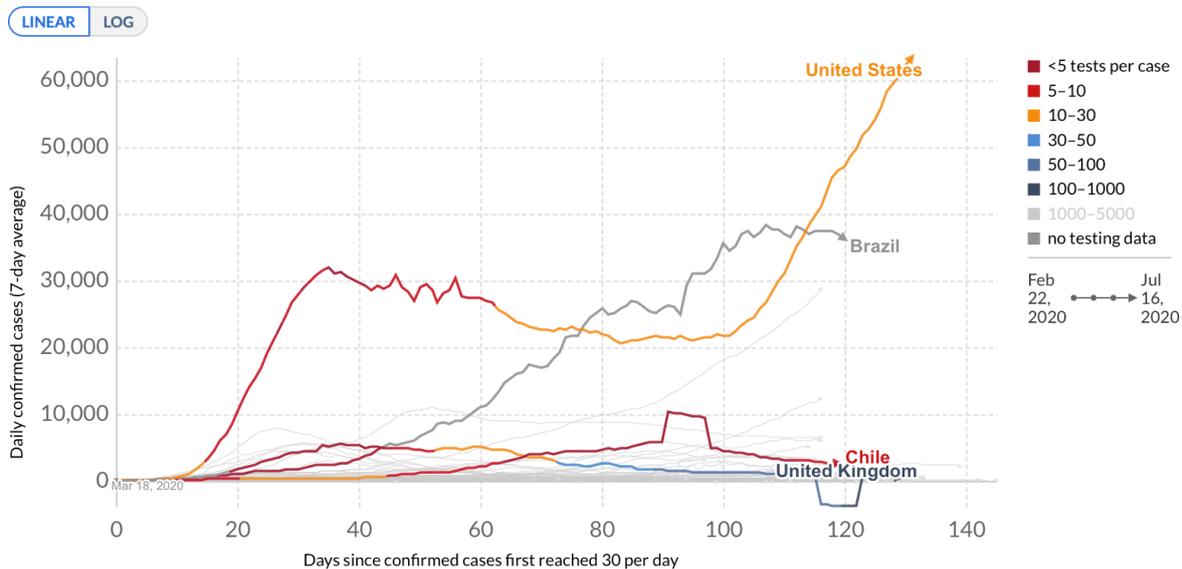
Worldwide COVID-19 Update

Whilst the spread of the virus in Europe has been brought under control with daily new cases falling in most countries, there is a significant outbreak going on in the United States and Brazil. Latest data from Brazil shows that new cases may have levelled out but there is no evidence that these are falling yet. The outbreak in Chile is on a much smaller scale, and new cases appear to be falling. Despite localised outbreaks in the UK, the virus appears to be on the decline.

Daily new confirmed cases of COVID-19

The line is blue when a country performs many tests relative to the size of the outbreak. Red indicates a low number of tests per case. This suggests that the true number of infections may be far higher than the number of confirmed cases.

Our World
in Data



Latest data show that the six countries that are currently experiencing more than 6,000 new cases daily are: USA (66,000), Brazil (43,000), India (30,000), South Africa (10,000), Russia (6,000) and Colombia (6,000).

Brazil and Chile

Due to the LATAM flight links, the situation in Brazil and Chile has considerable consequence for the Falkland Islands in terms of flights resuming, consumer confidence, and protecting the COVID-free status of the Islands.

Brazil: at present, entry to Brazil is prohibited except for Brazilian nationals and foreign nationals with valid residency visas for Brazil, as well as foreign spouses, children and parents of a Brazilian national. This restriction is currently in place until 31st July.

Chile: Since a June spike in confirmed cases, the government announced that the Santiago region and five others, as well as three other urban areas in the country will continue to face quarantine until at least 17th July. The Health Ministry has announced (on 4th July) a strengthening of its strategy to test, trace and isolate cases. The borders to Chile remain formally closed (since 18th March). There has not been any further announcements on when borders will re-open to non-nationals.

DESTINATIONS

Entry Requirements

During July a vast majority of countries that rely on tourism or have thriving tourism sectors started opening up to tourism. Most have lists of countries that they consider as low, medium and high risk. Often travellers from high risk countries are not allowed to enter at all. Typically lists are updated weekly and are based on medical evidence of the number of new cases per 100,000 of the population.

We have selected eight typical island destinations to show the range of pre and on-arrival requirements that are demanded by authorities. Most commonly a PCR COVID-19 test is required before arrival with the completion of an online form that includes medical questions as well as details of the trip. In some countries, visitors are required to stay in approved accommodation, and in a few they are tested on arrival. The most stringent of all the countries profiled below is Bermuda.

Country	Open	Pre-Travel Requirements	On Arrival/In Country Requirements	Cost on Arrival
Barbados	12 th July	COVID-19 test 72 hours before arrival from high risk countries and one week before arrival from low risk countries.	Tested on arrival if visitor has not been tested pre-trip and stay in quarantine for up to 48 hours.	N/A
Bermuda	1 st July	COVID-19 test less than 5 days before travelling and completion of online travel authorisation form.	Take an arrival PCR COVID-19 test and isolate in hotel for approximately 6 hours until the result is known. Take own temperatures twice a day and report results online. Attend a COVID-19 test site on day 3, 7 and 14 of the stay.	US\$75
Cyprus	6 th June	No requirements for a list of low risk countries, and COVID-19 test taken 72 hours before travel for a list of medium-risk countries. All travellers need to complete an online Cyprus Flight Pass form 24 hours before arrival.	None	N/A

Country	Open	Pre-Travel Requirements	On Arrival/In Country Requirements	Cost on Arrival
Ecuador/ Galapagos Islands	1 st June	COVID-19 test 7 days before arrival.	Test on arrival if not tested pre-trip.	N/A
Iceland	15 th June	Complete an online Pre-Registration Form before boarding the flight to Iceland.	Test on arrival.	US\$110
Maldives	15 th July	None.	Thermal screening and health questionnaire on arrival. Can only stay in resorts (not guest houses).	N/A
Seychelles	1 st August	COVID-19 test 72 hours before departure - only visitors from low/medium risk approved countries (currently 19 on the list) allowed in.	Must stay in approved accommodation.	N/A
Turks and Caicos	22 nd July	Complete a form on the TCI Assured Travel Authorisation Portal which includes uploading a COVID-19 test certificate 72 hours before travel and completing a health questionnaire.	None	N/A

Airport Testing

There is a growing trend of offering COVID-19 testing facilities at airports for departing passengers, as well as for inbound visitors. Fraport and Lufthansa have partnered Centogene (a German biotech company) to launch a COVID-19 testing facility at Frankfurt Airport.



The facility is expected to remain open until 31st July 2021. Passengers can take tests one day before travelling or on the same day as departure with a fast-track option. The facility can process 300 samples an hour in a mobile lab that has been built in a container on the back of a lorry. Centogene is in discussions to provide similar facilities at other airports which can be set up at short notice due to the mobile nature of the testing booths and processing facilities.

Other similar developments have seen Ecolog Deutschland open a COVID-19 testing centre at Eindhoven Airport in the Netherlands. In the UK, Collinson and Swissport are ready to pilot a Test-on-Arrival COVID-19 testing procedure which could provide a solution for those travelling from places not included on the Government's list of countries exempt from quarantine



It is widely expected that testing at airports and other places convenient for travellers will expand rapidly over the next few months to cover the period between now and when a vaccination is hoped to be in wide circulation. Hopes for a successful vaccine are currently high, with the world-leading Oxford vaccine showing that it generates an immune response against the virus. Tests show that it stimulated the body to produce both antibodies and "killer T-cells". This is significant as antibodies may fade away within months while T-cells can stay in circulation for years.

Latest News

On 8th July the UK Government issued travel advice advising British nationals not to travel on cruise ships. The FCO advice stated "The Foreign and Commonwealth Office advises against cruise ship travel at this time. This is due to the ongoing pandemic and is based on medical advice from Public Health England". Naturally, this has caused considerable displeasure amongst cruise operators and others linked with the sector.

One of the key issues raised by the industry was that the advice was vague and did not differentiate between a boutique ship carrying 16 people or a mass-market one with 6,000 passengers. Others in the sector pointed out that the industry has gone to considerable lengths to make cruising safe, or as safe as possible with pre-boarding checks, the removal of self-service dining and social distancing.

It appears that protests by the Cruise Lines International Association (CLIA) and operators have had some impact with an update of the FCO advice on 16th July stating that it only relates to "international travel" on "sea-going cruise ships". This change excludes river cruising and cruises such as those operated by Hurtigruten around the UK (see below). However it doesn't appear to include expedition ships operating in international waters.

Following a successful return to sailing in June, Hurtigruten has released plans to bring 14 of its 16 ships back into operation in August and September, and it is hoped that these provide the company with pre-operational experience for the southern hemisphere Antarctic season. Both the MS Roald Amundsen and MS Spitsbergen will offer 6 to 15 day cruises on the Arctic archipelago.



The company is also launching a series of exclusive British Isles itineraries departing from Portsmouth, Liverpool and Glasgow, and short expedition cruises to off-the-beaten-track destinations such as the Isles of Scilly, Fowey, Oban, Fishguard and Waterford. Ships will operate at a reduced maximum capacity of 350 guests, approximately 65% of total capacity.

CONSUMER ATTITUDES AND CONFIDENCE

GWI Global Research

GWI Coronavirus Research has been undertaking consumer-based research in 18 countries (Australia, Belgium, Brazil, China, France, Germany, India, Italy, Japan, New Zealand, Philippines, Poland, Romania, South Africa, Singapore, Spain, UK and USA) over the period since the pandemic broke early in 2020. They have just completed the fifth wave of the research which was undertaken between 29th June – 2nd July.



The findings take into consideration the latest developments, including local lockdowns in China, Australia, India and Spain, the surge in US cases in some regions, much of Europe opening up to tourists, and parts of Latin America struggling to contain the spread. With a wide range of countries included, the findings provide a balanced viewpoint from over 15,000 individuals.

Key Findings

Levels of domestic concern have dropped to their lowest levels yet in some countries. Some countries are now recording the lowest levels of concern about their own domestic situation (these include France, Germany, Italy, New Zealand, Spain and the UK). Most of these places are seeing sustained success in reducing cases/deaths. However, concern has increased in Australia and China (where there have been second spikes).

Consumers are expecting the situation to last an increasingly long time. In every country surveyed the length of time that consumers expect their national outbreak to last for is growing. Overall, every country still expects the global situation to take longer to resolve than the one in their own country.

Personal financial outlooks remain broadly positive. When asked about the impact that they expect COVID-19 to have on their personal finances, outlooks are still broadly optimistic. Germany and China stand out as exceptions for being the most positive about their national economies.

Vacation plans dominated by domestic trips. When asked about their vacation plans in the next 12 months, consumers are most likely to take domestic vacations. Compared to the last survey wave (in mid-May) the appeal of domestic vacations has remained stable in most countries, showing that intentions have not changed much as many countries ease their lockdowns and attempt to regain a degree of international travel.

FURTHER INFORMATION

Economic Support Packages

FIG and FIDC are now ready to take applications for the Job Retention Scheme, Self-Employed Income Supplement Scheme, and the Business Grant Scheme. FIDC is administering the latter. More details can be found at:

<https://www.fig.gov.fk/covid-19/information/support-package-applications>
<http://www.fidc.co.fk/library/covid-19>.

A new unemployment subsidy scheme has also been announced, targeted at workers who have lost their jobs as a result of the crisis. The websites provide clear advice regarding the eligibility of each.

FIG Guidance

For guidance for individual businesses operating in a COVID-19 environment, including restaurants, public houses and retail, see:

<https://fig.gov.fk/covid-19/guidance>

