

## ETC HOSTS JOINT INDUSTRY SEMINAR ON POST-COVID RECOVERY OF TOURISM

- *Record reduction in travel for 2020 despite some pickup in summer months, with COVID-19 remaining a defining factor for travel into Q1 2021*
- *The pandemic has brought about shifts in traveller preferences and behaviours, to which the industry is adapting*
- *Key trends for tourism development post-COVID-19 are digitalisation, a concern for sustainability, and data and research used for identifying trends that can aid with the recovery*

**Brussels, 15 September 2020:** The virtual *International Seminar on the Tourism Path to Recovery Post-COVID-19* was held on 10-11 September, jointly organised by the European Travel Commission (ETC), European Cities Marketing (ECM) and MODUL University Vienna. The seminar aimed to provide a platform for knowledge-sharing on mitigating strategies to assist in the sustainable recovery of tourism and explored how innovation and big data can support the recovery of the tourism industry.

The two-day seminar saw a combination of a workshop, expert presentations and a panel discussion, exploring themes such as adapting to the new normal, trends that are gaining or losing importance across the sector, and success stories of smart adjustments made by the industry. Input came from a variety of industry experts from across the tourism value-chain.

### The state of play for the industry

The travel and tourism industry has been one of the hardest hit by the pandemic, with data collected over the last months showing that travel for 2020 will see a record reduction above 50%, despite some pickup during the summer months. David Goodger from Tourism Economics shared that Europe is benefitting from short and mid-haul markets due to the Schengen agreement and freedom of movement for citizens in the bloc, while China and the USA have the strongest performance in terms of hotel occupancy rates as they have larger domestic markets.

The outlook for the industry will largely depend on the epidemiological situation in the coming months, with COVID-19 remaining a defining factor for travel into Q1 2021. Assuming that a vaccine is developed by early 2021, there will be a further easing of lockdown measures. However, a patchwork reopening of borders can also be expected, due to future waves of infections. Indeed, the return to 2019 levels is not predicted to be seen until 2023.

### Changes to traveller preferences

The panel debate explored the new normal and what lies ahead for the sector. Valeria Croce from *Eurail*, Sabahat Pervez from *Emirates*, Elena Foguet from *Value Retail Spain*, and Alexander Robinson from *STR Global* gave their insights on how consumer preferences are shifting throughout the entire ecosystem due to the pandemic:

- From an aviation perspective, Emirates noticed that **consumers increasingly seek out flexibility** and regaining travellers' confidence is essential for tourism businesses today. One step that the airline took in this direction was the introduction of a COVID-19 insurance that covers medical expenses, quarantine costs and repatriation to all passengers.
- The rail industry in Europe has seen a sharp **increase in short-distance holidays to rural destinations**, with tourists

avoiding crowded places, anticipated to continue into 2021. Similar to what aviation is experiencing, rail travellers are also increasingly demanding flexibility. Digitalisation will play a key part of Eurail's recovery strategy with a launch of a mobile pass to enable seamless and contactless experiences.

- A thread that can be observed throughout the sector is that the behaviour of consumers has become **more cautious and focused on health and safety**. Value Retail has seen that shopping protocols have helped improve confidence for guests with transparency being crucially important to highlight the safety measures.
- For the hospitality sector, STR Global is observing that **domestic travel is recovering fastest**. Notably, accommodation occupancy rates in major European city destinations such as London, Paris and Amsterdam are growing slower as opposed to rates in the countryside and natural areas.

The input from these key industry stakeholders is a clear indication of the changing patterns and preferences of travellers as society adapts to the reality of COVID-19, and the changes that are occurring right across the sector.

## Development of the sector post-COVID

COVID-19 has demonstrated the utmost importance of the sector's need to adapt to changes quickly. The three key shifts identified during the seminar for tourism development post-COVID-19 are *digitalisation, a concern for sustainability among travellers, and data and research for identifying trends that can aid with the tourism recovery.*

A prime example of a shift towards these trends is the increased interest in rail travel alongside the redirection of tourism flows to less crowded destinations. While partly due to the lack of air travel connectivity, the trend also shows increased awareness of sustainability issues among travellers. This provides an opportunity for destinations to capitalise on the trend of increased rail travel to develop new products and offers, such as slow tourism.

Another key change likely to be seen is hospitality becoming a priority. The focus will shift from footfall and number of visitors towards prioritising spend per visitor, which provides an opportunity for the tourism sector to focus on improving the quality of tourists versus the quantity of tourists.

In relation to data and monitoring, the industry has seen that bookings are being made at the last minute. According to Vincent Nijs from Visit Flanders, this will result in more emphasis being placed on the collection of real time data, reinforcing the idea that digitalisation of the sector will be crucial in a post-COVID world.

The seminar closed out with the sentiment that there is a cautious, but optimistic approach and a need to continue strengthening cooperation between tourism organisations as the sector adapts to the situation. Speaking after the seminar, ETC Executive Director Eduardo Santander, said: "*We are extremely pleased to have been able to jointly host such a timely and relevant seminar with colleagues across the sector. Despite the many challenges the COVID-19 crisis has created, it has also presented opportunities for the travel and tourism sector, allowing the industry to transition to one that is more sustainable, innovative, and quality-driven.*"

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### Note to editors

The European Travel Commission is an association of National Tourism Organisations (NTOs). It was created in 1948 to promote Europe as a tourist destination to the long-haul markets outside of Europe, originally in the USA and later in Canada, Latin America and Asia. It currently has 33 member NTOs, including 7 from outside the European Union. Europe is the world's no. 1 tourist destination with 742 million international arrivals in 2019 and more than 50% of the market share of worldwide tourism. For more information, please visit [www.etc-corporate.org](http://www.etc-corporate.org).