



# MANIFESTO FOR A SAFER, GREENER AND SMARTER TOURISM

Brought to you by WTM London

23<sup>rd</sup> November 2020



**SPACE GLOBAL** STRATEGY



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## Introduction

*"Travel is fatal to prejudice, bigotry, and narrow-mindedness, and many of our people need it sorely on these accounts. Broad, wholesome, charitable views of men and things cannot be acquired by vegetating in one little corner of the earth all one's lifetime."* Mark TWAIN

### **Manifesto For a Safer, Greener and Smarter Travel and Tourism:**

As Humanity struggles with an unprecedented sanitary and economic crisis, it has never been so urgent to work collaboratively across borders, governments and private sectors on shaping a better world for our children. The dramatic impact of the pandemic has demonstrated how travel and tourism are vital for economies, jobs and human wellbeing.

All are aligned that travel helps foster mutual understanding between peoples and cultures. Tourism has brought millions out of poverty and demonstrated a unique ability to promote peace and friendship across borders.

Our ambition is to co-create a flourishing "Visitor Economy" that has more positive impact on our planet, people and prosperity, than negative ones, over the short, medium and long-term. Tourism is firmly positioned in the 2030 U.N. Agenda for Sustainable Development. However, achieving this agenda requires a clear implementation framework, adequate financing and investment in technology, infrastructure and human resources.

WTM Virtual 2020's timing and global reach was the opportune moment to bring together, with the support of UNWTO and WTTC, 500 Ministers and international leaders from the travel & tourism sector. Through discussions and sharing of experiences and best practices, we could provide concrete solutions to our present and future challenges.

The outcome of our Ministers' Summit is this Manifesto, a document publicly declaring the position and the program of the participants, a set of ideas and a plan of actions, likely to influence governments and key global travel players' policies in the next decade, for a safer, smarter and greener travel and tourism.

Claude BLANC

WTM Portfolio Director

With thanks to all team members, editors, authors and contributors:

Space Global: Christoph Schedl, David Phippard; WTM event team: Claude Blanc, Debbie Stephens-Romancuk, Charlotte Alderslade, Simon Press, Jeannette Gilbert, Carrie Lee, Natalia Hartmann, Nick Nagle; UNWTO: Marcelo Risi, Sandra Carvao, Bélen Ramirez Llopis; WTTC: Gloria Guevara, Virginia Messina, Maribel Rodrigues, Tiffany Misrahi, Cathrin Czerwinka.

## About this Manifesto

This Travel & Tourism Manifesto summarises a set of policy recommendations to help the global travel & tourism sector recover from the current crisis and ensure long term recovery and transition to a safer, smarter and greener industry. The document builds on discussions during the UNWTO, WTTC and WTM Ministers' Summit on 9<sup>th</sup> November 2020 at WTM Virtual, contributions of key industry experts who have participated in a three-round Delphi study, and contributions of UNWTO and WTTC who have provided their relevant policy recommendations. The document is structured along the following chapters, summarising results from the Delphi study and current UNWTO and WTTC policy recommendations in each chapter.

- 1. State of the Industry, Outlook 2020-25
- 2. Policy Recommendations
  - 2.1. Globally Aligned Travel Restrictions
  - 2.2. Global Health & Safety Protocols
  - 2.3. Continued Government Support
  - 2.4. Smarter, Seamless Travel Experience
  - 2.5. A More Sustainable, Resilient and Inclusive Travel & Tourism Sector
- 3. Outlook

### Participation of leading industry experts via a Delphi Study

To inform this Travel & Tourism Manifesto, a Delphi study has been conducted with participation from 37 private-sector leaders, tourism ministers and independent experts. Participants were able to contribute to a three-round online Delphi study, with the ambition of creating clarity and consensus on policy requirements and industry next-steps around the five policy topics of this report. Upon seeing the results of the initial rounds, participants have had the chance to adjust their opinions based on their interpretation of alternative ideas put forward by other group members.

### UNWTO and WTTC contributions

Both the World Tourism Organization (UNWTO) and the World Travel & Tourism Council (WTTC) have contributed to the development of this manifesto. Their expert advice has helped shape the structure and outline of this document, and a full list of relevant topics and current policy recommendations has been provided throughout the document. Relevant policy recommendations have been summarised in each chapter of this manifesto, and a list of relevant sources can be found in the Appendix.

### Other research partners

'Tourism Economics – An Oxford Economics Company' ([www.tourismeconomics.com](http://www.tourismeconomics.com)) provided their detailed October 2020 forecast for this report, which is summarised in Chapter 1.

Our research partner **Space Global Strategy** ([www.spaceglobal.co.uk](http://www.spaceglobal.co.uk)) moderated the Delphi process and helped write this report.

## Delphi Participants

The authors would like to thank all experts for their participation in the Delphi study, and subsequent contribution to this manifesto.



- &Beyond, Joss Kent, CEO
- ABTA, Mark Tanzer, Chief Executive
- Advantage Travel Partnership, Julia Lo Bue-Said, Managing Director
- Affordable Car Hire, Angela Day, CEO
- Atout France, Caroline Leboucher, CEO
- City Sightseeing Worldwide, Enrique Ybarra, Founder, President & CEO
- Denver International Airport, Kim Day, Chief Executive Officer
- Iberostar, Sabina Fluxà Thienemann, Vice-Chairman & CEO
- Independent Adviser, Ken Robinson
- International Tourism Investment Conference, Ibrahim Ayoub, Director
- ITT, Steven Freudmann, Chairman
- Jamaica, Edmund Bartlett, Minister of Tourism
- Kuoni Travel UK, Derek Jones, Managing Director
- London and Partners, Tracy Halliwell, Director of Business Tourism & Major Events
- Luxtripper, Dermot Blastland, Adviser
- McEwan Travel Associates Ltd, John McEwan, Chief Executive
- Paraguay, Sofía Montiel de Afara, Paraguay Minister of Tourism
- Playa Hotels & Resorts, Bruce Wardinski, Chairman & Chief Executive Officer
- Radisson Hotel Group, Federico J. González, President & CEO
- Reed Exhibitions, Claude Blanc, WTM Portfolio Director
- Rocco Forte Hotels, Rocco Forte, CEO
- Saudi Ministry of Tourism, Haitham M. Mattar, Senior Advisor
- Sunvil Holidays, Noel Josephides, Managing Director and Owner
- UKInbound, Joss Croft, CEO

13 other senior decision makers of large organisations contributed but opted to remain anonymous:

- Three large travel & tourism groups
- Two tourism ministries (Europe, Central America) and a tourist office (Africa)
- Two major airport players (international airport, large service provider)
- A major industry association; an advisory firm
- Two large B2B media operators and a large international financial service provider

## Ministers' Summit Panellists

The Ministers' Summit was held on 9<sup>th</sup> November 2020, as part of WTM Virtual, with two panels:

- Panel 1. Leading the Way to Recovery
- Panel 2. Fundamentals for Long-term Growth

Our special thank you goes to the panellists sharing their experiences and best practices and contributing to the lively discussion.

Public sector panellists:

- The Rt Hon Oliver Dowden CBE MP, Secretary of State for Digital, Culture, Media and Sport, UK Government
- Nigel Huddleston; Minister for Sport, Tourism and Heritage for Digital, Culture, Media and Sport, UK Government
- Harry Theoharis, Minister of Tourism, Greek National Tourism Organisation
- Bernadette Romulo-Puyat, Secretary of the Department of Tourism, Philippines
- Hon. Nayef Al-Fayez, Minister of Tourism and Antiquities, Jordan
- Gustavo Segura Sancho, Minister of Tourism, Costa Rica

Private sector panellists:

- John Holland-Kaye, CEO, Heathrow
- Thomas Ellerbeck, Member of the Group Executive Committee, TUI Group
- James Thornton, CEO, Intrepid Travel
- Inge Huijbrechts, Global Senior Vice President Responsible Business and Safety & Security, Radisson Hotel Group
- Gloria Guevara, CEO World Travel & Tourism Council (WTTC)

## Executive Summary

### Deep decline in 2020, long road to recovery

2020 has been the annus horribilis of the travel & tourism sector: International travel & tourism spend (inbound) is forecast to experience a c.70% contraction in full year 2020 (source: Delphi study, UNWTO, Tourism Economics); employment levels are expected to drop by c.37% (source: Delphi study). Business travel and international travel & tourism have been specifically hard hit; in some destinations, domestic travel has partially compensated for the loss in international tourism (source: UNWTO panel experts).

Current forecasts for the coming years are not much more encouraging: participants of the Delphi study expect a long-winded and difficult recovery, with a rebound to pre-crisis levels only by Q3 2023, recovery of employment levels only in Q1 2024. Similarly, Tourism Economics forecast the global travel & tourism spend to regain pre-crisis levels only by 2023. International business travel is forecast to experience the most protracted recovery, with industry spend not recovering to 2019 levels until 2026. North America and Asia-Pacific are hit by the steepest decline in international arrivals.

### Concrete policy recommendations

Together with industry leaders and experts who participated in the Delphi study, and building on existing policy recommendations by UNWTO and WTTC, this manifesto develops insights and proposals around 5 policy areas that will be crucial to restart the global travel & tourism sector, shorten the timeline to recovery and ensure long-term, sustainable growth.

#### 1. Globally Aligned Travel Restrictions

Delphi study participants perceive the current “plethora of local, regional and national travel restrictions” as a major hurdle for a rebound of the global travel sector and call for globally-aligned travel restrictions based on common, evidence-based risk assessment. Pre-travel passenger testing from ‘at risk’ countries or regions, supported as much as possible by on-arrival testing in the destination country, should replace the great number of fast-changing unilateral travel restrictions, including the currently often used blanket quarantine rules on inbound travellers from certain geographies. Changes in travel restrictions should be communicated swiftly, but some (at least minimal) ‘notice period’ before new measures are introduced should be given to allow for planning among travellers and businesses. In the short-term, prior to globally-aligned travel restrictions, experts strongly support the creation of air corridors and ‘travel bubbles’.

#### 2. Global Health & Safety Protocols

Global health & safety standards are widely seen as a prerequisite for any significant turnaround in the global travel & tourism sector. Experts participating in the Delphi study expect that globally aligned standards could shorten the timeline to recovery by up to six months.

WTTC and UNWTO have published detailed guidelines, which are widely supported by industry experts. This manifesto calls for three core topics to be addressed: (i) Operational and Staff Preparedness, (ii) Ensuring a Safe Experience, (iii) Rebuilding Trust and Confidence.

#### 3. Continued Government Support

Given the deep decline in 2020, long duration of the crisis and the second wave in COVID-19 infections, continued government support is seen as crucially important by the Delphi experts. Ideally, government support should be more targeted at the travel & tourism sector and cover all types of players in the eco-

system, with specific programmes targeted at SMEs and larger companies. Key priorities are (in order of ranking): (i) extended and improved job retention schemes that also address workers in informal employment, (ii) direct grants, ideally for specific needs and/or targeted at specific type/size of companies; (iii) more generous exemptions from taxes, fees and other payments (e.g. VAT, travel-specific taxes); (iv) stronger collaboration and cooperation between the private and public sector. Given the higher importance of domestic tourism, especially short-distance tourism, experts are also asking for more public sector involvement in marketing and advertising for local tourism.

#### 4. Smarter, Seamless Travel Experience

Smart travel technology and seamless travel experiences are widely seen as potential drivers for the travel & tourism sector to overcome the current crisis (e.g. touchless and public health solutions). However, these are also longer-term initiatives that will shape the industry in the coming years, significantly improving the traveller experience.

Delphi participants highlight several areas as of high interest: (i) data analytics and personalisation, (ii) biometrics and digital identities, and seamless traveller journey; (iii) virtual assistants and virtual travel experience. Implementation of new tech solutions is however often held back by the lack of clearly visible ROI, and the 'survival mode' many companies find themselves in due to the COVID-19 crisis.

Experts suggest that improved public sector involvement (e.g. incentives for implementing specific technologies, cooperative/sponsored research projects) and better information on benefits and best practices could significantly speed up the transition to smarter and seamless technology.

#### 5. A More Sustainable, Resilient and Inclusive Travel & Tourism Sector

Participants of the Delphi study forecast that the current COVID-19 crisis will further increase the relevance and urgency of sustainability topics. The pandemic is generally seen as a 'reset' providing overall positive effect on sector sustainability. While a majority expect that they will focus more on sustainability in the coming years, 2/3 also fear that immediate investments will be postponed due to the current crisis.

Participants prioritise initiatives around (i) decarbonisation and carbon removal, (ii) destination stewardship/community engagement; including 'slow tourism', and (iii) action against human trafficking and wildlife trafficking. Participants are also strong advocates for concrete next steps to ensure the sector can achieve these sustainability goals, e.g. high interest in sustainability guidelines as well as sustainability monitoring and reporting.

#### Outlook

While all participants of the Delphi study agree that there will be no easy route to recovery, industry leaders voiced their expectation that policy areas discussed in this manifesto have the potential to significantly shorten the timeline to recovery:

- Better global alignment of travel restrictions, with testing to replace blanket quarantine rules, if implemented swiftly, could shorten the timeline to recovery by up to 8 months
- Expanded government support for the travel & tourism sector, with extended and improved job retention scheme and grants to bridge liquidity shortages: up to 7 months
- Better aligned health & safety standards, up to 6 months

It is crucial to emphasise participants' expectations towards alignment and harmonisation of travel restrictions and safety standards, and continued strong government support in these difficult times.



## Chapter 1: State of the Industry, Outlook 2020-25

With the COVID crisis overshadowing most of 2020, the travel & tourism sector is in the midst of a steep decline in industry spend. While government support and initial re-opening of the travel sector in early summer have had some positive impact, the second wave of COVID-19 and resulting uncertainty about the coming months, indeed the coming years, loom large over the industry.

This chapter draws on several sources forecasting travel & tourism spend for 2020 and the coming years:

- The Delphi Study conducted for the Ministers' Summit, discussions during the Ministers' Summit
- Tourism Economics' October 2020 forecast
- UNWTO's impact assessment (October) and scenarios

### Results in a nutshell

#### State of the industry 2020:

- Experts participating in the **Delphi study** expect a **70% decline in industry spend**, and 37% decline in employment levels. Despite an initial lifting of some travel restrictions in summer, particularly in Europe, experts remain highly concerned about the coming months – mainly due to the second wave of COVID-19 and uncertainty about government support.
- **UNWTO** reports 70% decrease in international arrivals (Jan-Aug 2020 vs. 2019) and the same levels in international tourism receipts, with the latest arrival numbers pointing to a decline in international tourist arrivals close to **70%** for the full year.
- Similarly, **Tourism Economics** forecasts a **69% decline** in **international** (inbound) **travel spend** for full-year 2020; domestic travel spend is expected to fare moderately better with a decline of 'only' 33%; overall decline in spend of 42%.

#### 2021-25 forecast:

- Participating **Delphi experts** expect a long-winded and difficult road to recovery; COVID-19-related **travel restrictions** are expected to be only fully lifted by **year-end 2021**. **Recovery of travel & tourism spend to pre-crisis levels** is currently expected to be achieved by **Q3 2023**, recovery of employment levels by Q1 2024.
- **UNWTO** expects international tourism to take 2.5 to 4 years to return to pre-crisis levels.
- **Tourism Economics**: After the steep 2020 decline, global travel & tourism spend is expected to regain pre-crisis levels only by **2023**. Domestic travel is forecast to achieve a quicker rebound, returning to 2019 levels by 2022; international travel only by 2024. **International business travel** is forecast to experience the **most protracted recovery**, with industry spend not recovering to 2019 levels until 2026. By contrast, international leisure travel is forecast to surpass pre-coronavirus levels by 2024. North America and Asia-Pacific are hit by the steepest decline in international arrivals; European international arrivals are forecast to see more modest falls in earlier years and come close to regaining 2019 levels by 2023, mainly due to the high proportion of intra-regional travel.
- **Panellists at the Ministers' Summit** stressed the importance of global coordination to ensure recovery can happen within the next 18 months, rather than over an extended 3-4 years' period.

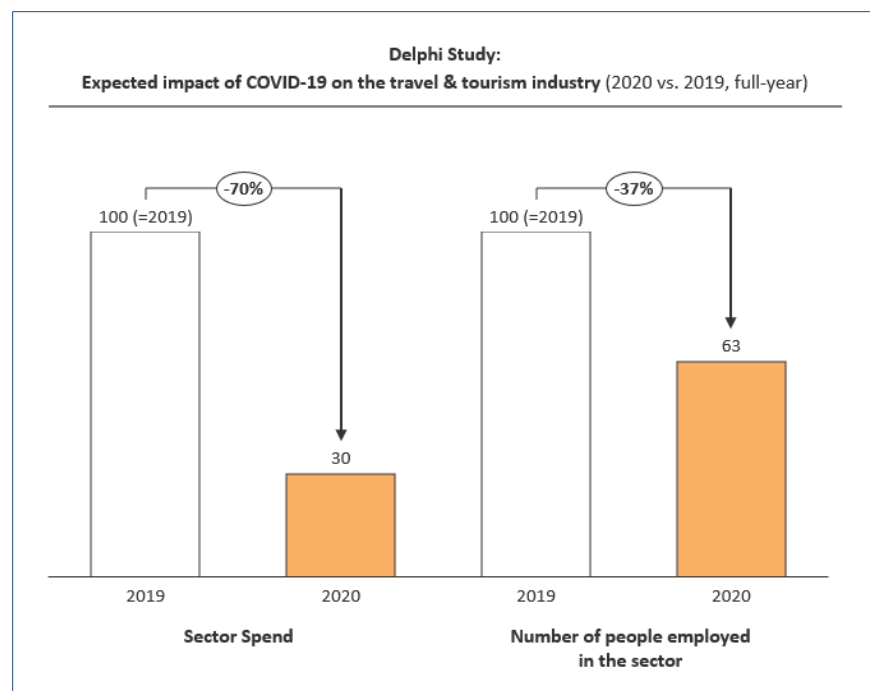
## 1.1 Delphi Study and Ministers' Summit Contributions

Participants of the Delphi study were invited to share their views on the state of the industry, with a specific focus on 2020 industry spend and employment levels vs. 2019, and the expected route to recovery.

### 1.1.1 Outlook 2020: Travel & tourism spend and employment levels

Participants of the Delphi study expect a **significant drop in both travel & tourism spend and employment levels in 2020**:

- Sector spend is expected to decline by c.70% (2020 vs. 2019)
- Employment levels are expected to decline by 37%



Most experts participating in the Delphi study are highly exposed to international travel and specifically hard-hit by the current crisis. The most drastic decline in 2020 industry spend is generally reported by respondents from travel agencies and tour operators, and those active in business travel and city tourism. The same sectors expect the highest drop in employment levels.

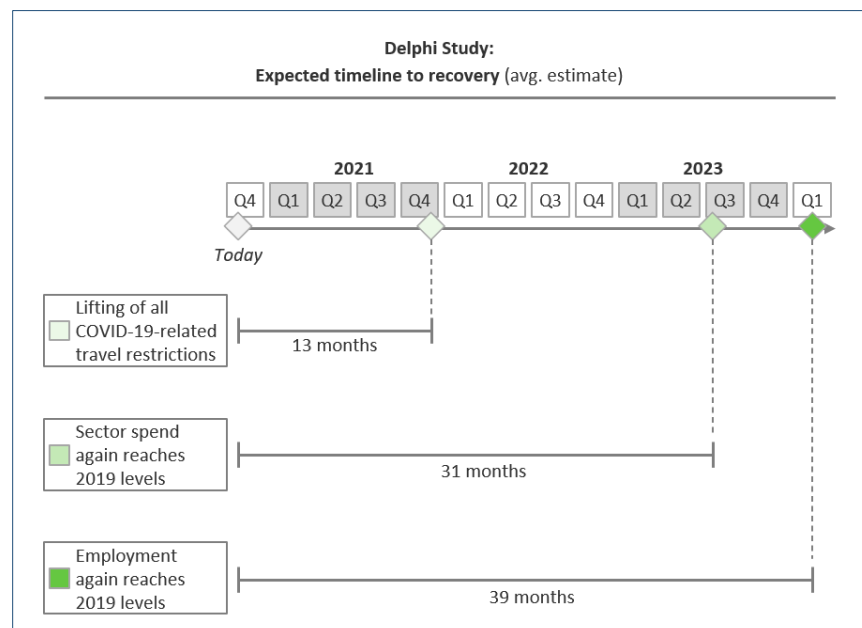
A series of **specific concerns** about 2020 industry spend and employment levels were raised:

- **Impact of the second wave:** The second wave of COVID-19 is generally seen as an unpredictable challenge, many respondents struggle to plan for the coming months. *“The second wave in Europe is hitting harder than the first wave”, “we expect another half year of serious disruptions”*
- **Specific issues for business travel:** *“Business travel and business events are [specifically hard hit], [they have been] locked down early in the pandemic and have been restricted from operating ever since. Business travel will continue to suffer from a change in working practices”*

- **Air connectivity:** Respondents worry about continuously low number of flights and the outlook for the coming months. *“Air connectivity remains low in the EU and in long-haul”*
- **Lack of international cooperation and volatile travel restrictions:** *“We operate in 15+ countries, and the data in drop in business and employment is very similar in all of them. Mobility restrictions have [resulted in] limited connectivity and therefore travel. The virus in parallel is generating distrust in the market, for fear of contagion or being confined outside the home. The lack of transnational collaboration has caused a very negative effect on tourist destinations.”* Government support for the travel & tourism sector is generally lauded, but volatile travel restrictions are widely criticised: *“Demand for international holidays has been impacted in the UK after the U-turns imposed by the UK government on destinations such as Spain, Portugal, France”*
- **Length of the crisis:** *“Most businesses are banking on a recovery time for summer 2021, and we are retaining as many staff as possible to be ready for rebound. But if this fails to materialise then further job cuts will be inevitable”*
- **Increasing rate of business failure:** Severe concerns were raised about liquidity in the sector and the impact of business failures on the highly-connected international travel & tourism sector. *“We are already seeing significant failure in the sector, including previously successful businesses, and we anticipate a difficult six months ahead”; “we have already seen many business failures, more will come over the next months. Many more travel experts will sadly lose their jobs”*
- **Immanent threats to employment levels:** *“The [UK] furlough scheme helped bring hope that by November things would be better. Sadly, October demand is at April/May levels. So any company that had not reduced their headcount over summer will have to do so to survive”; “the travel sector have earned no revenue since March 2020 and cannot keep staffing levels as they were”*

### 1.1.2 The road to recovery

Participants of the Delphi study expect a long-winded, difficult road to recovery, with sector spend staying below pre-crisis levels until Q3 2023.



### Lifting of travel restrictions

Delphi study participants expect that COVID-19-related travel restrictions will only be fully lifted by **year-end 2021** (13 months from Oct 2020). Most respondents expect that a COVID-19 vaccine needs to be widely available before restrictions will be lifted.

### Recovery of travel & tourism spend to pre-crisis levels

The vast majority of respondents (74%) expect sector spend to require at least 2 years to recover to 2019 (i.e. pre-COVID) levels. The average expected time to recover is 31 months, i.e. recovery to 2019 levels would be achieved in **Q3 2023**.

Most respondents expect a slow-paced, long-winded route to recovery.

- *“Very slow recovery, [further impacted by a] change in travelling trends”; “until we have a vaccine travel will not come back to 2019 levels. [Also,] people will have less money with redundancies that have been made and there is also less capacity”; “when vaccines are finally produced it will take months to deliver them around the world, and many tourist destinations may not be able to afford the level of vaccination required in order to satisfy the FCDO that it is safe”; “consumer confidence is at an all-time low when it comes to traveling. It will take some years to come back”*
- *“ABTA undertook a survey [...] in August 2020, which showed that 93,000 jobs were lost or at risk within the wider UK travel industry. That figure represents 18% of all roles in the wider UK outbound travel industry. The same survey asked respondents to outline their views on recovery – 47% of respondents expect the industry not to bounce back before 2022, with 24% expecting it to take until 2023 until travel recovers to 2019 levels. However, 15% of respondents believe recovery could be achieved in 2021. Only 4% of respondents anticipate that the industry will not recover at any point. ABTA would expect that sector spend would recover along a similar trajectory”*

**Business travel** is expected to be specifically hard hit: *“Corporate travel and big events are hit hard and [face an] even slower recovery”; “there will be structural changes in the ways in which business travel is organised and is operated. More supply than demand will suppress prices”*

Industry experts do, however, also have **some hopes** for the **vaccines** currently in development, and a potential **new risk assessment** following the second wave.

- *“Much depends on Government policy, whether a vaccine emerges and whether testing to enable people to travel becomes more widely used. Perceptions that COVID-19 is not the killer it originally was thought to be are establishing themselves which will eventually spur more normalisation”; “treatments and vaccines are being announced for 2021. At present, mortality rates have dropped considerably; the virus is getting better known. All this makes us think that in March-April 2021 the tourist industry could be reactivated”; “ABTA’s Holiday Habits survey shows that for 2021, 57% are planning a holiday abroad, which is lower than previous years. However, on spending, the majority plan to spend more on their next holiday than on their last”*

Panellists at the **Ministers' Summit** shared the wide-spread concern that the travel & tourism sector might take three to four years to recover. However, they also see a large amount of **pent-up demand**, which can be tapped into quickly once traveller confidence is rebuilt:

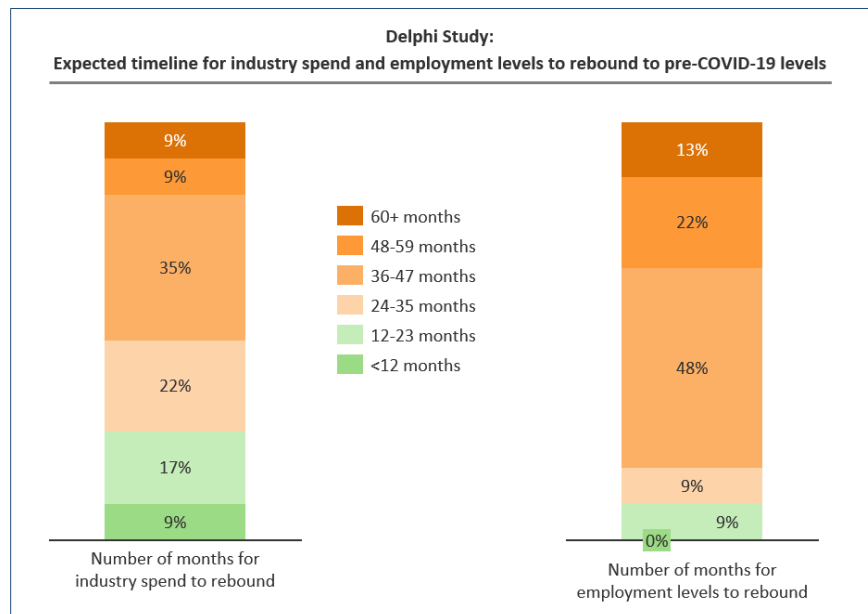
- The Rt Hon Oliver Dowden, Secretary of State for Digital, Culture, Media and Sport, UK Government: *"Coronavirus has humbled every industry, but perhaps none so as this sector. But there is good news for tourism: Huge amount of pent-up demand, building daily since the pandemic hit; everyone wants to go on holiday but can't; those millions of people who were forced to delay their holidays this year will be more eager than ever to travel in 2021 and the years beyond"*
- Bernadette Romulo-Puyat, Secretary of the Department of Tourism, Philippines: *"We can't just wait for a vaccine; we have done a travel survey, and 77% would want to travel, even without a vaccine; we have shown with our domestic tourism that it can work, people have been travelling, no COVID cases"*
- Harry Theoharis, Minister of Tourism, Greek National Tourism Organisation: *"The pandemic has changed travellers' attitudes – initially, the reaction was fear, everyone had to cocoon; we managed to reopen, albeit with fragmentation, and that is now the biggest challenge; there is lots of pent-up demand and we need a recovery with less restrictions; e.g. more rapid testing and other tools that will allow us more harmonisation"*
- John Holland-Kaye, CEO, Heathrow: *"We are expecting that international tourism will come back quickly once people can travel again. There is massive pent-up demand, and of course the UK is a great destination for inbound tourism; it's actually one of our best export sectors. We need to make sure that we survive as an aviation sector over the next 18-24 months, when the market is going to be incredibly difficult so that we can support not just the tourism sector but all the other sectors in the UK that depend on aviation"*
- Gloria Guevara, CEO WTTC: *"We have done a lot of surveys; travellers want to travel; there are some groups, like the millennials and generation Z, and some from generation X, who are okay travelling with the protocols we have in place; but they don't want to be in a country that closed their border, they don't want to be in quarantine; 70% of travellers e.g. in the US are ready to start planning, as long as there are no quarantines; [...] If we can learn from the past, have international coordination, and learn to co-exist with the virus, then we can recover in 18 months; without international testing protocols and countries working together it will take 3-4 years"*

### Recovery of sector employment

The majority of respondents expect the recovery in employment levels to significantly lag the recovery of industry spend. 91% expect it will take a minimum of 2 years for employment levels to reach pre-crisis levels. The average expected timeline is 39 months, i.e. recovery by **Q1 2024**.

- *"Many people will be out of work for some time as the economy recovers, less will be able to afford a holiday"; "travel companies have been obliged to look at greater automation as their systems were pushed into reverse; fewer people are needed to do the tasks that are now low-touch or customer self-serve"; "frictionless is a work used by many parts of the travel industry, this means fewer people. It will therefore require much higher volumes before businesses need to get back to 2019 staffing levels"; "the recovery of employment can be a slower process. There is no way to forecast this accurately at this stage. However, looking at the previous economic recession, the*

*financial crash of 2008, the recovery of GVA to previous levels occurred for UK outbound travel in 2013, but for employment to recover to previous levels took until 2016 – three years later”*



Panellists at the **Ministers’ Summit** specifically discussed the impact on millions of jobs around the world, and the need for swift government action:

- Gloria Guevara, CEO WTTC: *“Domestic recovery is great, but not enough for jobs; if we don’t get international travel back to a decent level we’re going to see 174m jobs impacted; if we resume international travel in a safe and healthy way and if we work together we can bring 100m jobs back in less than 18 months”*

### Changes in industry fundamentals

Many respondents expect more fundamental changes to the industry in the coming years.

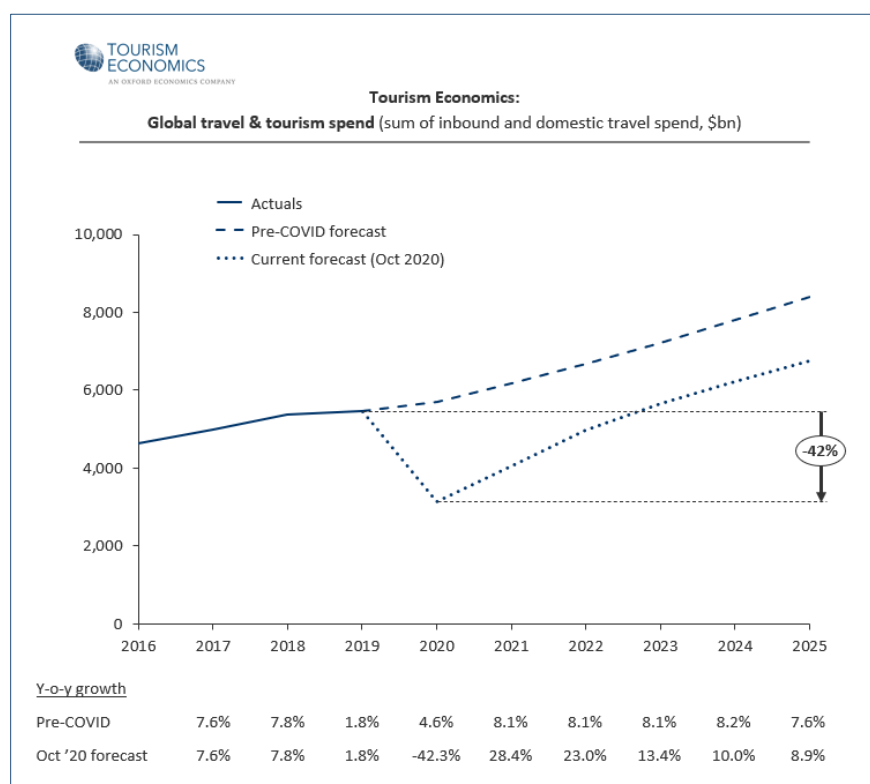
- *“I believe the industry has changed forever [and] that whilst we may see a return to pre COVID levels over the next 3 years +, travelling has changed forever. And whilst restrictions in time will be lifted I believe testing is likely to stay and sustainability will remain even higher on the agenda”; “[even after a] ‘return to normal’, [a lot] will be different, e.g. the required skills, talent and expertise will differ to what we have today”; “employment levels will take time to recover. Reskilling processes, new professions and new ways of customer relationship will lead to a new way of travel”; “the pandemic is going to [lead to an] economic crisis that will affect tourists’ budgets. Companies will accelerate the processes of efficiency and transformation”*

## 1.2 Tourism Economics Forecast

'Tourism Economics - An Oxford Economics Company' ([www.tourismeconomics.com](http://www.tourismeconomics.com)) provided their detailed October 2020 forecast for this report. Below is a summary of their forecast.

### 1.2.1 Global travel & tourism spend – overall industry forecast

Tourism Economics forecasts **global travel & tourism spend**, comprising both international and domestic travel spend, to contract by c.42% in 2020 vs. 2019. This equals a decline in global spend of US\$ 2.3 tn. Industry spend is expected to reattain pre-crisis levels only by 2023.



While economic activity picked up in Q3 2020, helped by government support, this has now seemingly stalled and Tourism Economics does not expect an immediate return to pre-coronavirus growth trends. Given the expected significant impacts on employment in the broader economy, traveller confidence will take time to recover.

For 2019-20, Tourism Economics **pre-COVID-19 forecast** predicted a 4.6% increase in spend and c.8% annual growth from 2020-25. The **October 2020 forecast** instead predicts a 42% decline for 2020; despite 20%+ annual growth in both 2021 and 2022, it will take until 2023 for travel & tourism to make up for the stark decrease in 2020, and the gap to the pre-COVID-19 forecast remains significant even at the end of the forecasting period (2025).

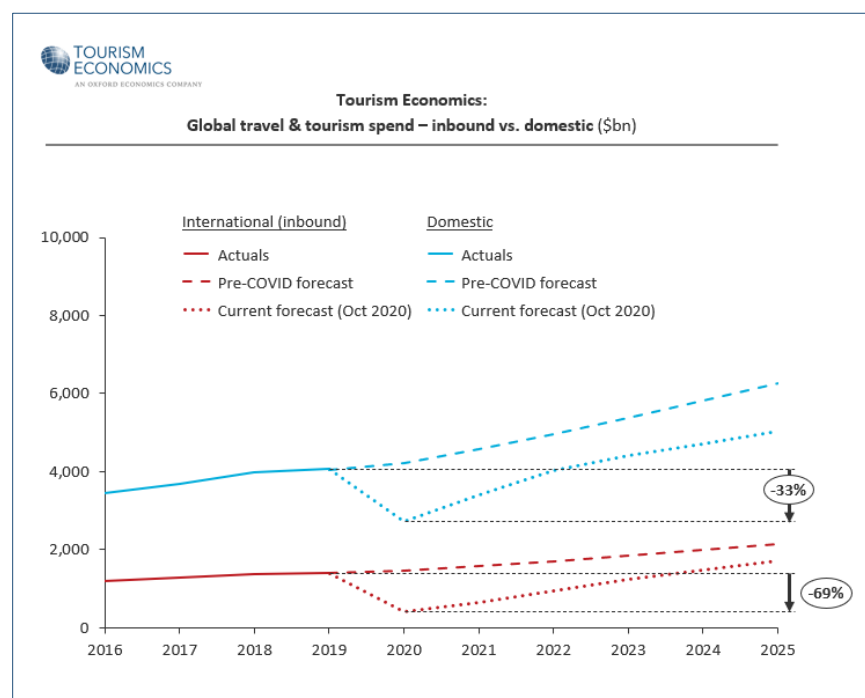


### 1.2.2 International vs. domestic travel & tourism

Domestic and international travel will both be impacted by travel restrictions, the blow to disposable income and travel budgets, as well as associated confidence effects. However, the **2020 decline** will be **most severe for international travel**. Tourism Economics forecast international travel spend to decline by 69%. Domestic tourism is expected to fare moderately better, with a 33% decline.

In the near-term, the outlook is for tourists to remain closer to home and travel either domestically or to short-haul destinations. Domestic travel is thus forecast achieve a quicker rebound, returning to 2019 levels by 2022. International travel is forecast to return to 2019 levels by 2024.

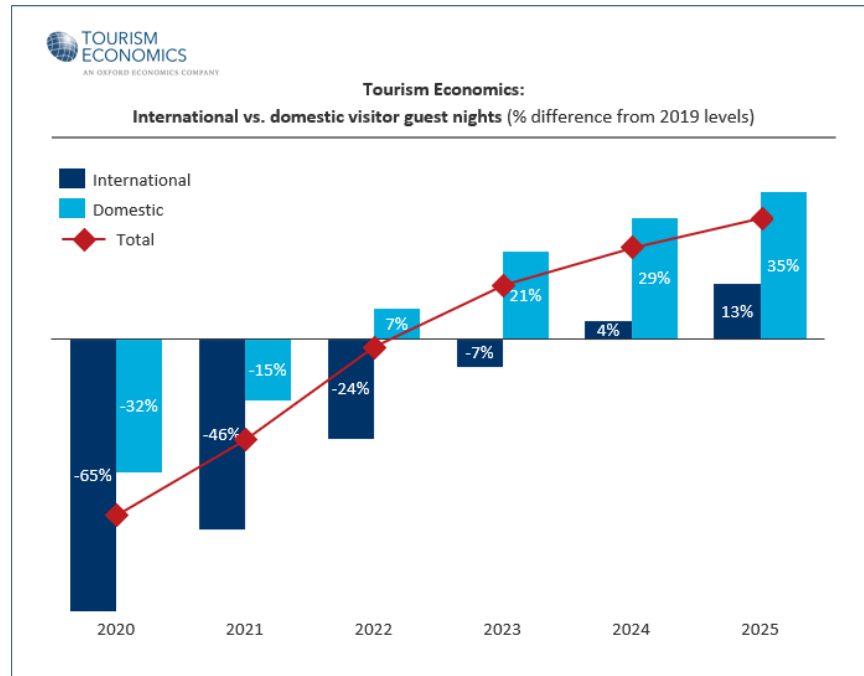
As shown above for total travel & tourism spend, the expected growth trajectory for both international and domestic tourism lags significantly behind the pre-COVID forecast, up until 2025. Even by 2025, both domestic and international tourism spend will be 19% below the pre-COVID forecast value.



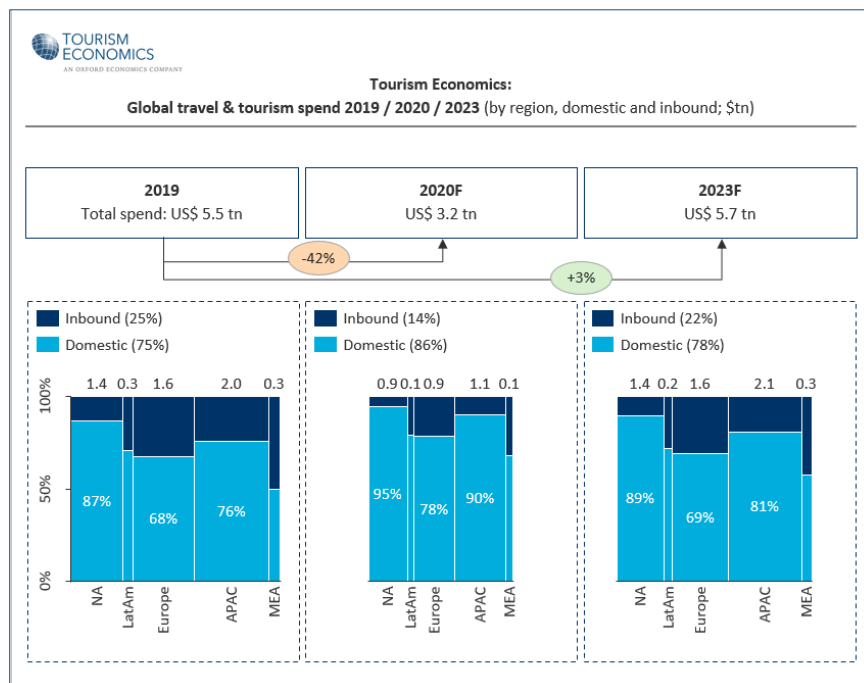
A similar picture emerges when looking at the forecast for the **global visitor arrivals numbers**:

- Visitor guest nights are set to drop by 65% in 2020, equating to a loss of almost 1 billion visitors compared with 2019. The initial recovery in arrival numbers in the second half of this year has been slower than anticipated, due to restrictions remaining in many destinations, and a resurgence in infection rates dampening demand.
- International visitor guest nights see a significantly sharper fall in 2020: a 65% decline vs. 2019 levels, vs. a 32% decline for domestic visitor nights. Recovery for international visitor nights will take significantly longer than for domestic travel.





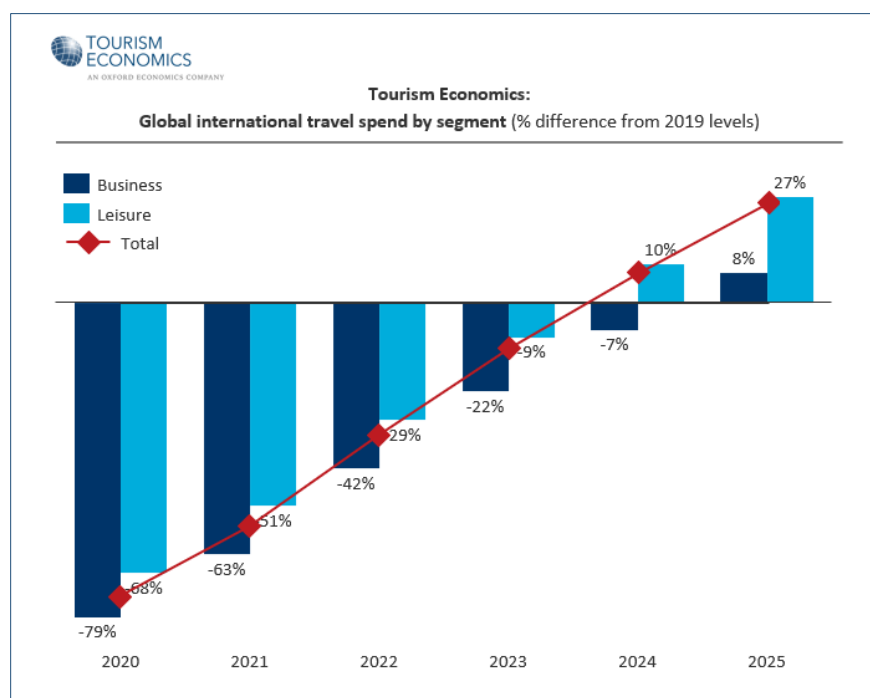
The **composition of spend by region and purpose of travel (international vs. domestic)** varies greatly throughout the forecasting period: Pre-crisis (2019), international (inbound) travel & tourism spend accounted for 25% of total spend. This is expected to fall to only c.14% share in 2020. By 2023, as the industry recovers, the share of international travel of total spend will still only be at 22%.



### 1.2.3 Global international travel by purpose: business vs. leisure

Tourism Economics forecast **international business travel** to experience a **more protracted recovery** than leisure travel, with 2019 levels not recovering until 2026. By contrast, international leisure travel is forecast to surpass pre-coronavirus levels by 2024. This is in line with findings from previous external shocks, when international business travel was also slower to recover than leisure travel. While business visitors are generally less price sensitive, slower investment growth indicates lingering pressure on travel budgets during the recovery period.

While travel budgets are constrained, Tourism Economics also expect digital meetings to continue to substitute for some in-person meetings. However, face-to-face meetings are expected to remain to have an important role in business activity and will not be fully replaced by virtual solutions in the longer-run.



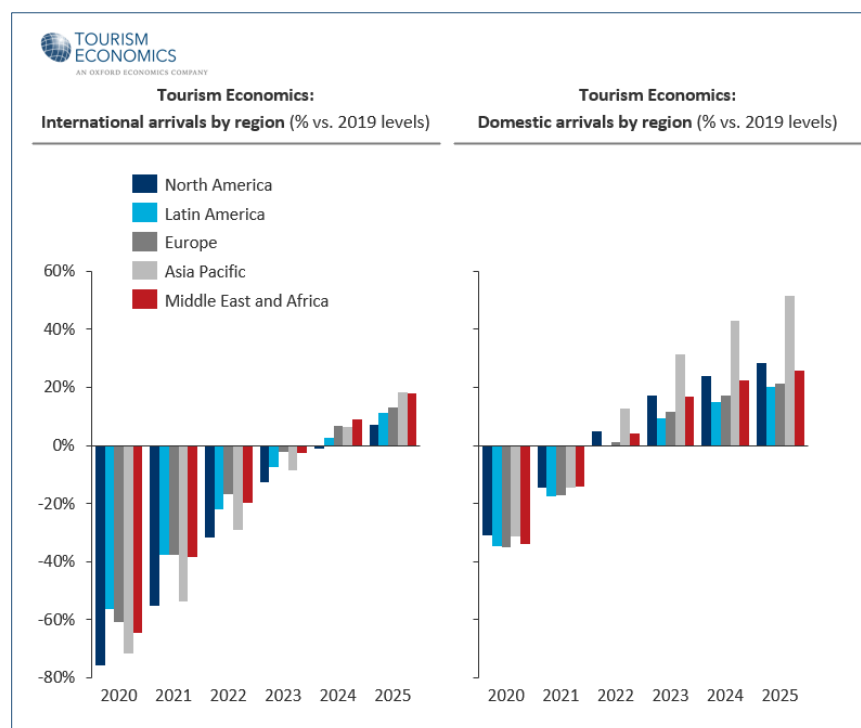
### 1.2.4 International and domestic travel by destination region

**International travel** to all world regions is affected by the current crisis and Tourism Economics forecast a protracted recovery in international demand for all destinations. Differences across regions and countries are evident due to the severity of restrictions and the mix of source markets.

- European international arrivals are expected to come close to regaining 2019 levels by 2023, with some slightly more modest falls in earlier years compared to other regions. This slightly earlier recovery is due to the high proportion of intra-regional travel.
- North American destinations have a higher reliance on long-haul markets for their international activity and recovery will be more protracted.

**Domestic travel** is somewhat less affected, partly due to fewer internal travel restrictions imposed. Domestic travel demand is expected to fall by 'just' 32% for 2020 as a whole.

Domestic activity is also supported by some substitution due to restrictions on international travel, including quarantine and testing measures as well as travel bans.

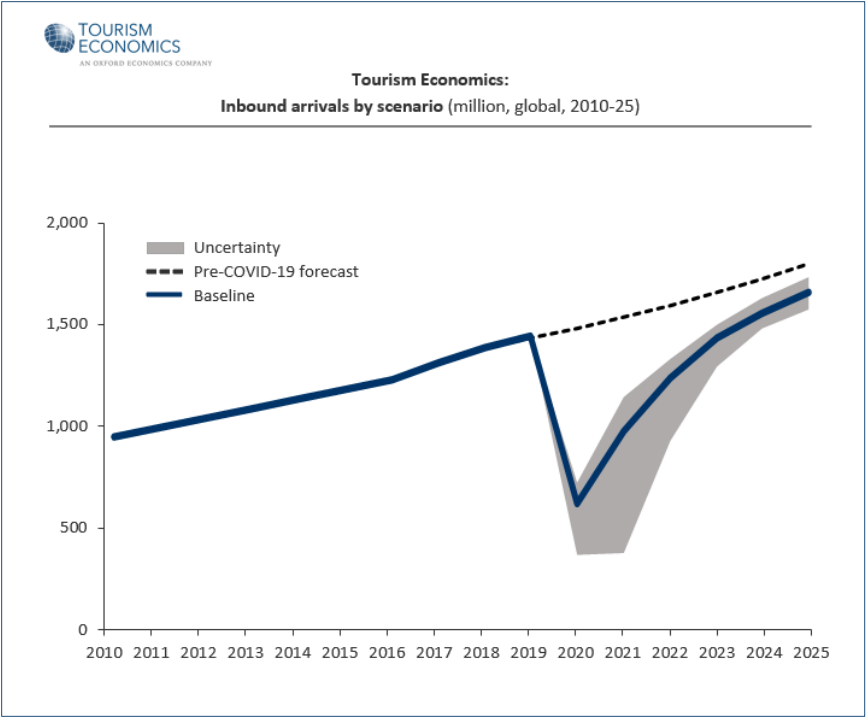


### 1.5 Uncertainty in the outlook

Tourism Economics cautions that the travel outlook is marked by vast uncertainty and significant downside risks. The unpredictability of the global environment is illustrated by the speed and volatility with which countries have changed travel restrictions, which in turn damages tourist sentiment and inhibits a swift recovery.

Risks to the downside relate to renewed travel restrictions following increased infection. This would be exacerbated by reduced traveller confidence and worse economic outcomes, including greater focus on the accumulation of debt and reduced public sector support; higher borrowing costs; increased unemployment; and lower travel spending for both business and leisure.

Upside potential could be realised with some scientific advances including faster development and distribution of vaccines and therapeutics, as well as greater co-operation in testing and tracing.

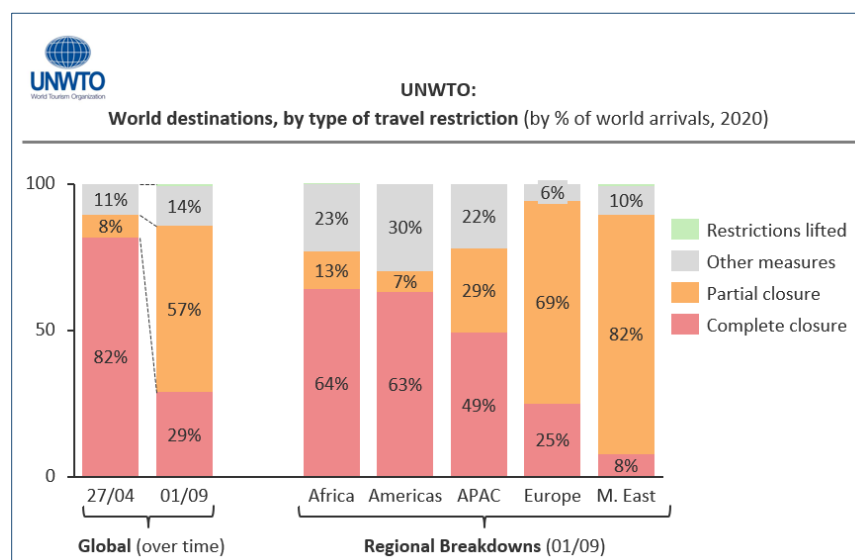


### 1.3 UNWTO Impact Assessment and Scenarios

This document summarises the latest issue of UNWTO's World Tourism Barometer<sup>1</sup> and UNWTO Recovery Tracker<sup>2</sup>, providing insights on current border restrictions and international tourist arrivals in recent months, including a full-year-outlook.

#### 1.3.1 International Tourist Arrivals: 2020 YTD

Whilst **complete border closures have decreased, restrictions remain a reality** across the vast majority of the globe (as of September 2020), creating a main barrier for the recovery of international tourism:



- The number of countries imposing 'complete closure' of borders dropped from 156 in April (constituting 82% of global international tourism arrivals) to 93 in September (29% of arrivals)
- In turn, the share of countries imposing 'partial closure' has increased significantly. 'Partial closure' ranges from e.g. compulsory quarantines to travel bans for certain markets (note: countries with 'other measures' typically require incoming travellers to present a negative COVID-19 test)

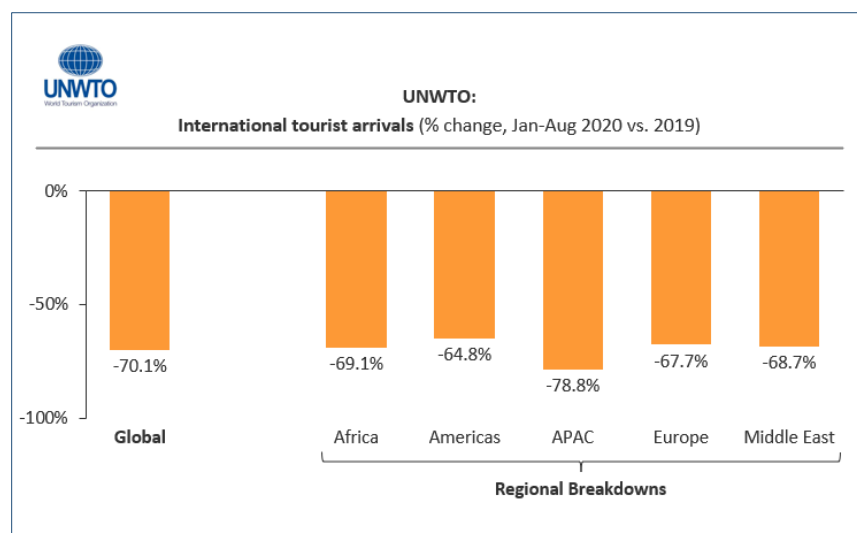
The decreasing proportion of 'completely closed' destinations has, naturally, correlated with the **decelerating decline in monthly y.o.y. int'l tourist arrivals**; i.e.

- May 2019 saw 97% fewer arrivals than May 2020, with a slight increase in June (-91% during respective periods) and July (-81%)
- However, this 'uptick' has slowed (to -79%, August), as restrictions have been reintroduced following a resurgence in outbreaks, particularly in Europe. Some countries have returned to national/partial lockdowns and curfews, whilst borders remain closed in many countries

<sup>1</sup> World Tourism Barometer: 18/ 6; <https://www.e-unwto.org/doi/epdf/10.18111/wtobarometereng.2020.18.1.6>

<sup>2</sup> <https://www.unwto.org/unwto-tourism-recovery-tracker>

From January to August 2020, global international tourist arrivals have decreased by 70% (vs. Jan-Aug 2019). International air demand has also declined by 70% during this period, in line with tourist arrivals (IATA). The decline in January-August 2020 represents 700 million fewer international tourist arrivals compared to the same period in 2019, and translates into a loss of US\$ 730 billion in export revenues from international tourism, more than 8 times the loss in 2009 under the impact of the global economic crisis.



### 1.3.2 International Tourist Arrivals: Scenarios FY 2020

In May 2020, UNWTO published three scenarios for the development of international tourism in 2020<sup>1</sup>. Scenarios assume different starting dates for travel restrictions to be lifted, and national borders to be opened.

	Easing of travel restrictions begins	Decline in int'l tourist arrivals ('20 vs. '19)
Scenario 1	Early July	-58%
Scenario 2	Early September	-70%
Scenario 3	Early December	-78%

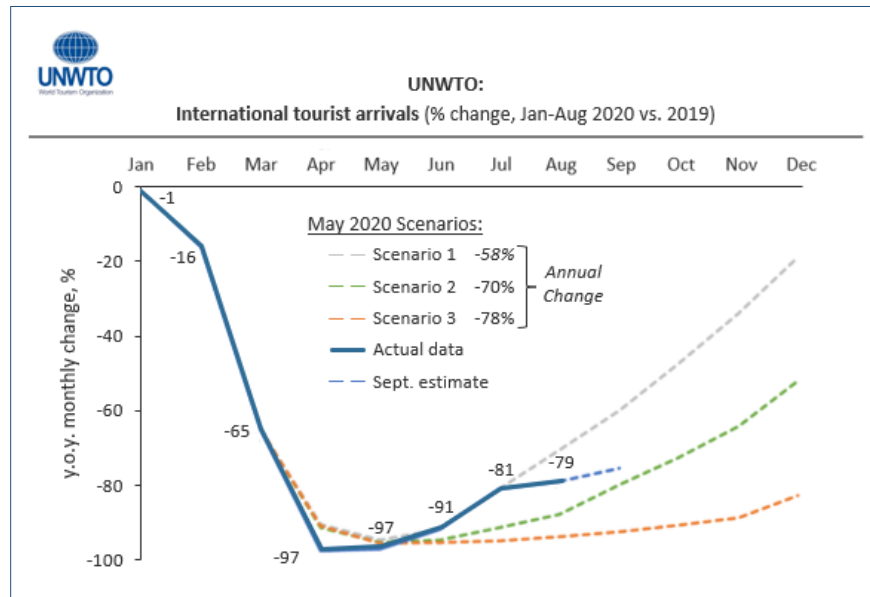
UNWTO warn that the outlook remains highly uncertain and volatile as new cases of COVID-19 continue to be reported worldwide (42m confirmed cases to date, according to the World Health Organization).

- Latest trends continue to place the expected end of year results of international tourist arrivals between Scenarios 1 and 2 (-58% to -70%). Considering the decrease of 70% in arrivals through August and an estimated 75% drop in September, **latest trends suggest a decline in international tourist arrivals closer to 70% for the whole of 2020<sup>2</sup>**.
- Scenario 1 now seems unlikely despite the lifting of travel restrictions in some countries in June and July, as this was mostly limited to Europe and proved to be short-lived. In July and August,

<sup>1</sup> <https://www.unwto.org/news/covid-19-international-tourist-numbers-could-fall-60-80-in-2020>

<sup>2</sup> <https://www.e-unwto.org/doi/epdf/10.18111/wtobarometereng.2020.18.1.6>

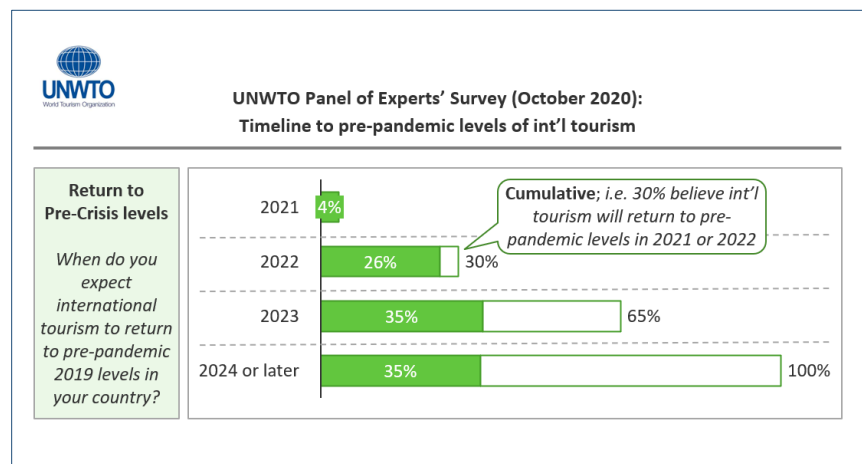
several European destinations reintroduced quarantines and other measures in response to growing cases of COVID-19. By mid-October most of these restrictions had not been lifted, and major int'l tourist destinations in other parts of the world (e.g. China, USA) remained closed.



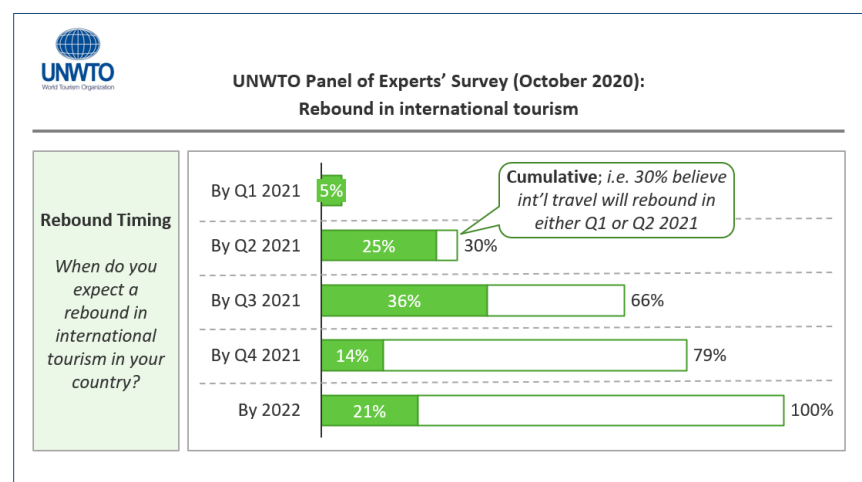
### 1.3.3 Timeline to recovery

UNWTO conducts a Panel of Tourism Experts' survey to track global tourism performance and business sentiment every 4 months since 2003. The most recent edition, conducted during the first week of October 2020, posed additional question on the impact of COVID-19 and time to recovery. Experts remain **cautious about the coming months and years**:

- Only 30% of experts expect a return to pre-pandemic 2019 levels prior to 2023
- **Majority expect a recovery to 2019 levels by 2023**
- On a regional level, the forecast is more optimistic for Africa (where 50% of experts expect a return to pre-pandemic levels before 2023), and slightly more optimistic for Middle East and Asia Pacific (40% and respective 34% of experts expect a quicker recovery)

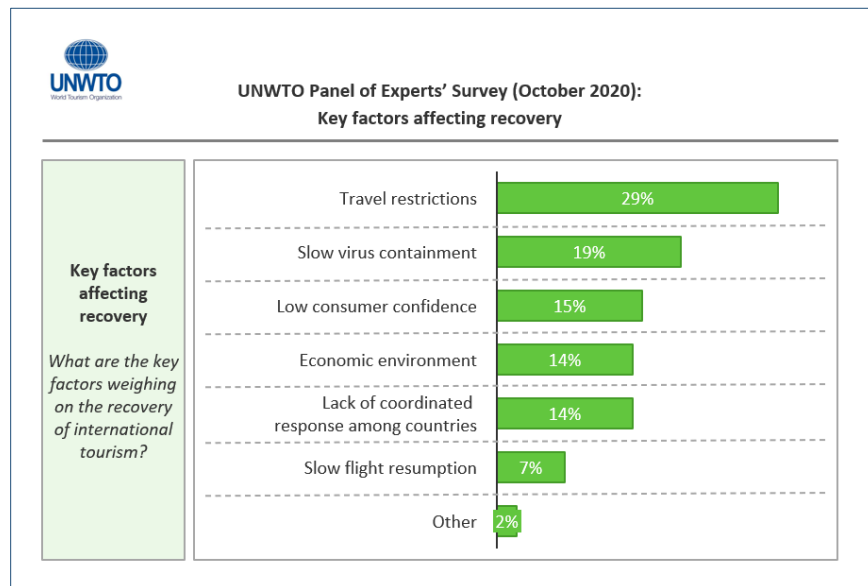


Experts surveyed by UNWTO also remain sceptical about any near-term rebound in international tourism: While a total of 79% expect a rebound at some point in 2021, the majority of those expect the rebound to occur in the second half of the year.

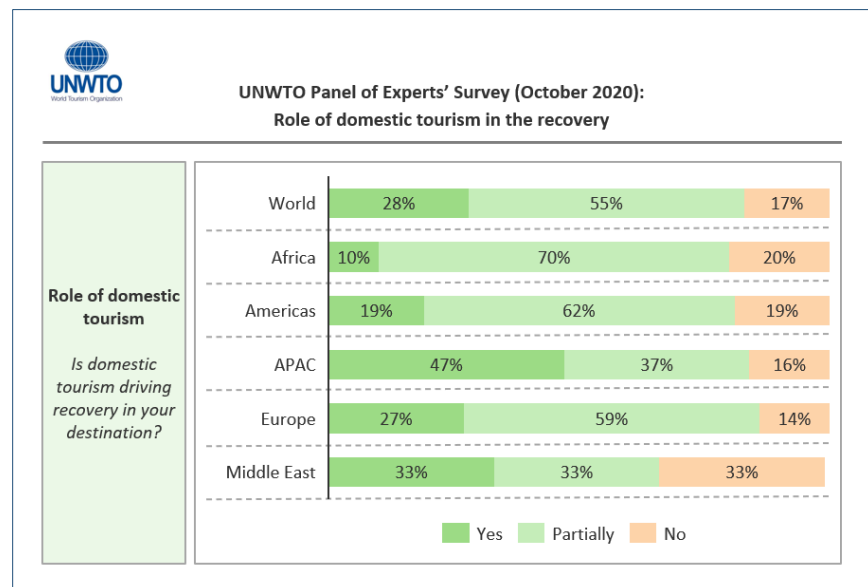




Experts surveyed by the UNWTO consider travel restrictions as the main barrier weighing on the recovery of international tourism, along with slow virus containment and low consumer confidence.



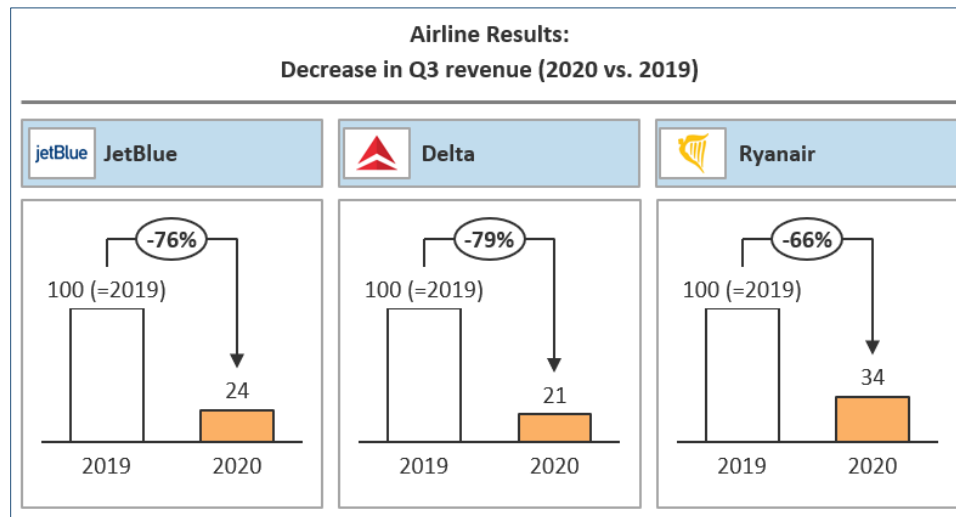
Domestic tourism is driving the recovery of several destinations but in most cases only partially, as it is not compensating for the drop in international demand. Respondents from Asia and the Pacific were the most positive regarding the contribution of domestic tourism to the recovery of destinations.



## 1.4 State of the Airlines

The airline segment has been particularly hard-hit by the crisis. The following pages summarise airlines' recent performance, demand environment, and ongoing plans and initiatives to navigate the pandemic. Insights are drawn from the recent Q3 results and presentations of JetBlue<sup>1</sup>, Ryanair<sup>2</sup> and Delta<sup>3</sup>:

### Revenue and demand environment



- **Demand environment (Q3):** US and European carriers cite differing trends:
  - JetBlue: somewhat positive signs; 76% revenue decline in Q3 exceeded their planning assumption of 80%, driven by improving leisure and VFR (visiting friends and relatives) trends, slight reduction in new case counts, and easing of quarantines in some states
  - Delta: somewhat positive; *“slow and steady build in demand”*
  - Ryanair: despite a less severe quarterly revenue downturn (-66%), recent trends have been negative. Passenger confidence/forward bookings have been significantly impacted by the return of uncoordinated EU Govt flight restrictions in Sep./Oct
- **Longer-term outlook:** whilst uncertainty prevails, surviving airlines are cautiously optimistic that they are well-positioned for the future:
  - JetBlue: promising bookings coming into Thanksgiving and December holiday travel period; expecting improved revenue decline of -65% in Q4 (y.o.y.)
  - Delta: Likely 2+ years until a normalized revenue environment returns. However, by restoring customer confidence in travel and building customer loyalty in the short-term, Delta are creating the foundation for sustainable future revenue growth
  - Ryanair: future will depend on European approach to travel restrictions and lockdowns. EU’s traffic light system offers a way to build consumer confidence and bypass quarantines – EU must push this to deliver a summer 21 tourist season. If/when effective vaccines emerge in early 2021, Ryanair expect to be able capitalise on the

<sup>1</sup> <http://blueir.investproductions.com/investor-relations/financial-information/quarterly-results/27-10-2020>

<sup>2</sup> <https://investor.ryanair.com/wp-content/uploads/2020/11/Ryanair-H1-FY21-Presentation.pdf>


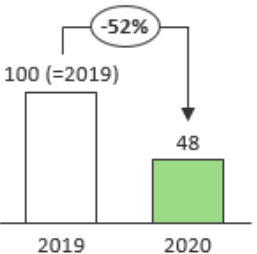
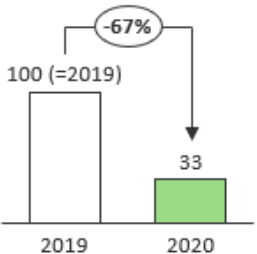
<sup>3</sup> [https://s2.q4cdn.com/181345880/files/doc\\_financials/2020/q3/Delta-Air-Lines-Announces-September-Quarter-2020-Results.pdf](https://s2.q4cdn.com/181345880/files/doc_financials/2020/q3/Delta-Air-Lines-Announces-September-Quarter-2020-Results.pdf)

many growth opportunities available in markets across Europe - especially where competitor airlines have substantially cut capacity or failed

### Mitigating the crisis

Airlines cite 3 core pillars to their ongoing management of the crisis:

- Reduced operating costs (payroll, maintenance etc.)
- Reshaping their networks (aircraft orders, capacity management, routes etc.)
- Liquidity (debt/equity financing, government assistance etc.)

	JetBlue	Delta	Ryanair
<b>OPERATING COST REDUCTION</b>	 <p>Adjusted work schedules and eliminated discretionary spend</p>	 <p> <ul style="list-style-type: none"> <li>• Pay reduced by 32% (c.18k employees taking voluntary redundancy, in addition to unpaid leave, work hour reductions)</li> <li>• Maintenance expenses reduced by 75%</li> </ul> </p>	 <p> <ul style="list-style-type: none"> <li>• Restructured pay, lauda, and utilised EU govt payroll schemes</li> <li>• Renegotiated terms with suppliers, maintenance providers, marketing, airport deals, lessors etc.</li> </ul> </p>
<b>NETWORK RESHAPING</b>	<ul style="list-style-type: none"> <li>• Cut capacity to match demand (-58% in Q3, y.o.y.)</li> <li>• Restructured aircraft orders; negotiated a second agreement with Airbus to defer additional aircraft and associated capital expenditure in coming years</li> <li>• Ensuring JetBlue are in a position to generate cash as demand recovers – e.g. redeploying aircraft to new, cash accretive markets</li> </ul>	<ul style="list-style-type: none"> <li>• Cut capacity to match demand (-63% in Q3, y.o.y.)</li> <li>• Restructured aircraft orders; purchase commitments decreased by &gt;\$2bn in 2020</li> <li>• Accelerating fleet simplification strategy, intended to streamline the company's fleet, enhance customer experience and generate cost savings. Nearly 400 aircraft will be retired by 2025</li> </ul>	<ul style="list-style-type: none"> <li>• Cut capacity to match demand</li> <li>• Prepare for/facilitate post COVID-19 growth opportunities - e.g. adopting the new "gamechanger" Boeing 200-series aircraft (offering 4% more seats, 16% lower fuel burn and 40% lower noise emissions)</li> <li>• Route development teams working with airport partners across Europe</li> </ul>
<b>LIQUIDITY</b>	<p><i>Recent liquidity-building initiatives include:</i></p> <ul style="list-style-type: none"> <li>• Refinanced a \$1bn 364-day term loan maturing early 2021</li> <li>• Executed \$300m+ under sale-leaseback transactions for new aircraft and existing aircraft in our fleet.</li> <li>• Drew \$114 million from the CARES Act Loan Program facility</li> </ul>	<ul style="list-style-type: none"> <li>• Raised \$9bn in debt in September (largest debt offering in aviation history)</li> <li>• Borrowed \$1.5 billion in connection with the issuance of tax-exempt bonds</li> <li>• \$1.3 billion CARES Act benefit</li> </ul>	<ul style="list-style-type: none"> <li>• Raised €400m of equity</li> <li>• Raised a 5-year €850m eurobond</li> </ul>

## Chapter 2: Policy Recommendations

This chapter gives an overview of policies suggested by experts in the Delphi research and during the Ministers' Summit, but also summarises existing policy documents and recommendations by UNTWO and WTTC. The chapter is structured along the following five topics:

- Globally Aligned Travel Restrictions
- Global Health & Safety Protocols
- Continued Government Support
- Smarter, Seamless Travel Experience
- A Sustainable, Resilient and More Inclusive Travel & Tourism Sector

While the first three topics give an overview of policies aimed at the immediate to a quick recovery from the current crisis, chapters 4 and 5 have a longer-term scope: creating the fundamentals for a smarter, and greener and more inclusive travel & tourism industry.

## 2.1 Globally Aligned Travel Restrictions

This chapter outlines policies that promote a more globally-aligned, evidence-based framework for the harmonisation of travel restrictions. The chapter builds on expert input from the Delphi study, but also summarises existing recommendations by UNWTO and WTTC. In addition, the EU Commission's recently published 'Proposal for a Council Recommendation on a Coordinated Approach to the Restriction of Free Movement' (September 2020) is summarised, as it offers a fully-fledged template of what an alignment of national policies could look like in practice.

### Results in a nutshell

**Participants of the Delphi study** perceive the current “plethora of local, regional and national travel restrictions” as a major hurdle for a rebound of the global travel sector and call for globally-aligned and consistently-imposed travel restrictions based on evidence-based risk assessment:

- Pre-travel **passenger testing** from ‘at risk’ countries/regions, possibly supported by on-arrival testing in the destination country, should replace the great number of unilateral travel restrictions, including the currently often used blanket quarantine rules on inbound travellers from certain geographies.
- Experts are keen on **regional/district level risk assessment**, vs. currently widely-used country-level assessment, to allow for more targeted measures.
- Changes in travel restrictions should be **communicated swiftly**, but some (at least minimal) ‘**notice period**’ should be given to travellers and businesses before new measures are introduced.
- In the short-term, prior to globally-aligned travel restrictions, experts strongly support the creation of **air corridors** and ‘**travel bubbles**’ with bilaterally agreed risk-assessment and safety protocols.

**Ministers’ Summit panellists** specifically stress the importance of a globally-aligned, testing-led strategy, with several panellists calling for wider use of rapid antigen tests.

**UNWTO and WTTC** also call for a higher level of international collaboration in terms of travel restrictions and the harmonisation of protocols:

- **UNWTO** issued their Global Guidelines to Restart Tourism<sup>1</sup>, calling for restrictions to be informed by an evidence-based assessment of the public health risk; ideally, risks should be to be mitigated at departure/arrival; consistent and reliable information regarding travel restrictions should be made easily available. It also stresses the protocols should be implemented along the whole tourism ecosystem in line with the following principles:
  1. Safe and Seamless travel for residents, travellers and workers in full respect of health regulations
  2. Clear and evidence-based protocols and information
  3. Data sharing on the basis of consent and applicable regulations, and in full respect of data privacy policies
  4. Non-discrimination of travellers and non-imposition of unnecessary new obstacles for travellers with specific access requirements

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<sup>1</sup> <https://webunwto.s3.eu-west-1.amazonaws.com/s3fs-public/2020-05/UNWTO-Global-Guidelines-to-Restart-Tourism.pdf>

5. Digital transformation; and
  6. Measures should be in place only as long as necessary with respective protocols to be replaced with better alternatives or removed as the situation allows
- **WTTC** has repeatedly called for a more coordinated approach to travel restrictions via several recent publications (To Recovery and Beyond, Letters to the G7, 100 Million Jobs Recovery Plan), specifically calling for an international framework for travel restrictions, contact tracing and testing requirements; quarantine measures should be modified to only apply for travellers with positive test results. WTTC also recommends bubbles and air corridors as an intermediate step.
  - The **EU Commission's** 'Proposal for a Council Recommendation on a Coordinated Approach to the Restriction of Free Movement' (September 2020) could serve as a template for more aligned standards. Specifically, the detailed suggestions about criteria and timelines for risk assessment, and suggested measures for travellers from high-risk regions could be of interest for policy makers from other regions.

### 2.1.a Delphi Study and Ministers' Summit Contributions

Panellists at the **Ministers' Summit** discussed the need for better global alignment. Panellists specifically focused on the need to reopen borders, using a risk-based approach to travel restrictions, with more use of rapid antigen tests.

**Learning from the past** was mentioned as an important enabler for swift recovery and for saving jobs:

- Gloria Guevara, CEO WTTC: *"The **crisis has already impacted 143m jobs and 3.8trn US\$ industry spend**; up to 174m jobs could be impacted by end of the year. [...] Public and private collaboration is critical to recovery and to bringing back the millions of jobs impacted by the crisis. **It is up to us if we recover in 18 months or 3-4 years**; but for a quick recovery, we need to learn from the past: In the case of 9/11 it took us 3-4 years to recover, because of the lack of international coordination and not ideal public-private coordination, lack of protocols; 2008, on the other hand, saw very good public-private sector coordination and international cooperation and we recovered in 18 months"*

**International coordination** is seen as crucial, with clear need for an aligned, **risk-based approach** to travel restrictions:

- Thomas Ellerbeck, Member of the Group Executive Committee, TUI Group: *"Our **biggest challenge is that our customers are confused**. We need to give them more confidence – and we need a framework, how we handle the virus. The best case would be to get a vaccine, but we have to learn to live with the virus; we have learnt a lot this year, and actually we saw a lot of collaboration between the private sector and governments this year. When you look at Europe, Greece was a good example – we worked together very intensively from the beginning, we talked about the restart, how can we get hygiene standards up and running [...] But now there are so many different regulations across Europe, and also within Germany, 16 states with different regulations, so at some point people are confused. [...] The WTTC has done a great job, bringing all these leaders and ministers together. But we have to do more also in the source markets"*
- Gloria Guevara, CEO WTTC: *"Our biggest challenge is international coordination. [...] We have to move from just containing the spread of the virus to also co-existing with this virus – it is here to stay, so **we have to resume travel in a safe way**; we need to focus on contact tracing, a safe, seamless, harmonised travel experience; health protocols are also crucial to rebuilding trust from the travellers. [...] And for international testing protocols you also need to have int'l coordination, and we believe that it could be risk-assessed: if you are travelling from a low-risk country to a high-risk country, you don't need a test on departure, but when travelling from a high-risk to a medium- or low-risk country, you absolutely need a test on departure and perhaps another test on arrival, to avoid exposure to the virus"*
- Bernadette Romulo-Puyat, Secretary of the Department of Tourism, Philippines: *"Our tourism sector is open to domestic tourists, e.g. we have a travel bubble around the island of Boracay; it's been successful, so far we have had zero COVID cases; [...] we think we can do more travel bubbles, maybe short-haul, around South-East Asia first, then the whole of Asia; it's important that we adhere to the health & safety protocols that the WTTC also follows"*

Panellists specifically raised the **importance of a coordinated testing regime**; wider use of **rapid antigen tests** is seen as a solution:

- Gloria Guevara, CEO WTTC: *“**International testing protocols are key** so that we can travel between countries; we need an agreement on what type of tests to use, and what are we testing; so if a test is performed in a country of departure, to avoid exporting the virus, then the country the traveller is travelling to should accept that result; this needs more coordination, maybe first regionally and then more globally. [...] We believe the rapid antigen test is the solution: it is low-cost and efficient. [...] But is the vaccine the silver bullet? No, we cannot wait for the vaccine. We need to learn from the past; we were able to travel during SARS, MERS, Ebola without a vaccine”*
- Thomas Ellerbeck, Member of the Group Executive Committee, TUI Group: *“**I’d lobby that we focus more on the antigen/rapid tests**, instead of the PCR tests, because in the past 6 months there has been lots of progress, the antigen/rapid tests are really safe, have developed a lot. A good testing strategy is needed, probably even double testing strategy before departure and after arrival”*
- Harry Theoharis, Minister of Tourism, Greek National Tourism Organisation: *“The experiences we have had with **antigen tests** have been very positive; so we would encourage other countries as well to look into that [...] The antigen test has 2 crucial characteristics: (1) speed, it takes max. 15min; (2) low costs, travellers can even take over the costs; [...] Will the vaccine be the silver bullet? I’m sure that with or without the vaccine we will have some residue of health protocols, different mode of operation, coming out of this crisis. And it is also important to bridge the gap from now until the vaccine comes; we don’t know the effectiveness yet; it will take some time until the vaccines feed through; and we need to make sure we have the kind of protocols that keep the trust with our customers”*
- Bernadette Romulo-Puyat, Secretary of the Department of Tourism, Philippines: *“One of the key challenges are the higher travel costs – higher insurance premiums, additional costs of COVID testing before travel; also the 14-day quarantine is a challenge, when going back from the Philippines. [...] We find PCR tests quite expensive; so the Philippine Department of Tourism has been pilot-testing antigen testing together with the WHO”*
- Thomas Ellerbeck, Member of the Group Executive Committee, TUI Group: *“We have had our first cruise lines resume in Germany and Greece, and started as a bubble; we asked our guests to be tested before they leave Germany, they flew on one aircraft all together, they’ve been on the ship, and from of July until today we have had more than 40,000 cruise guests without any COVID cases; this shows, when the protocol is in place and both sides take responsibility, when governments and companies feel responsible, it can work... therefore I’ll ask everyone to have more innovative tests, more exchange of best practice and international cooperation”*

The general conclusion was that it will be **important for the public sector to take the lead**:

- *“Who should take the lead? I think the public sector right now. [...] The private sector is ready, but we cannot do this alone (Gloria Guevara, CEO WTTC)*



Similarly, **experts participating in the Delphi** study call for an internationally-coordinated approach to COVID-related travel restrictions. The following three topics have been highlighted as requiring urgent attention:

### (i) Globally-aligned risk assessment

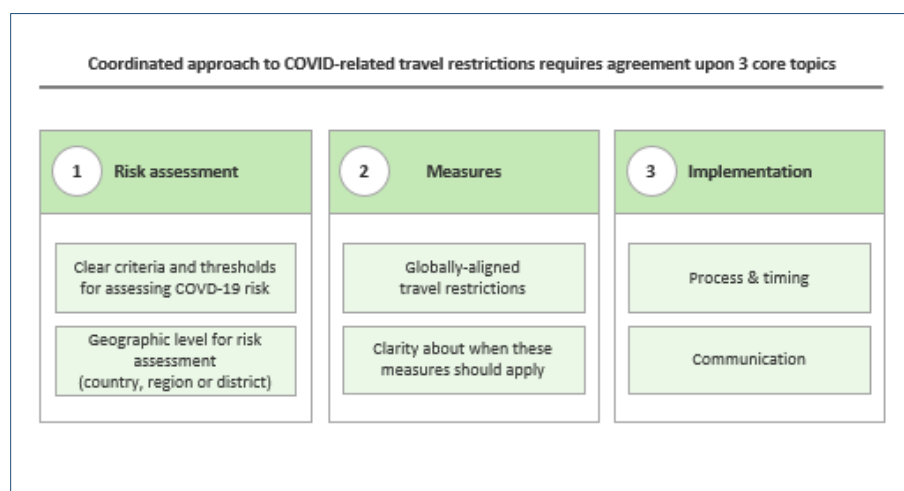
- It will be important to align the approach for risk assessment: Which geographies are seen as low/medium/high risk? Which criteria are used to assess this risk? And which geographic lens is used to assess this risk (country level, regional level, district level)?
- Experts hope that a globally-aligned structure for risk assessment will create more transparency and clarity for the travel sector, but also create more transparency and predictability for the travellers who currently do not have access to a single, reliable source of risk information.

### (ii) Globally-aligned travel restrictions / measures

- Once a geography is assessed to be at 'risk': what measures should be introduced? Experts call for a global alignment of travel restrictions in line with agreed levels of risk. The current variety in restrictions – from outright bans to quarantines to testing requirements, applied between shifting sets of countries – is seen as hugely damaging for the industry. The frequent U-turns and short notice policy changes are perceived to further dampen traveller confidence as well as business continuity.

### (iii) Swift but transparent and well-communicated Implementation

- Experts call for an orderly, more predictable process for implementing/revising travel restrictions, from more transparency in the decision making (common criteria for risk assessment = common measures), to giving some (at least minimal) 'notice period' to travellers and businesses adaptation before new measures are introduced, to better communication of travel restrictions.

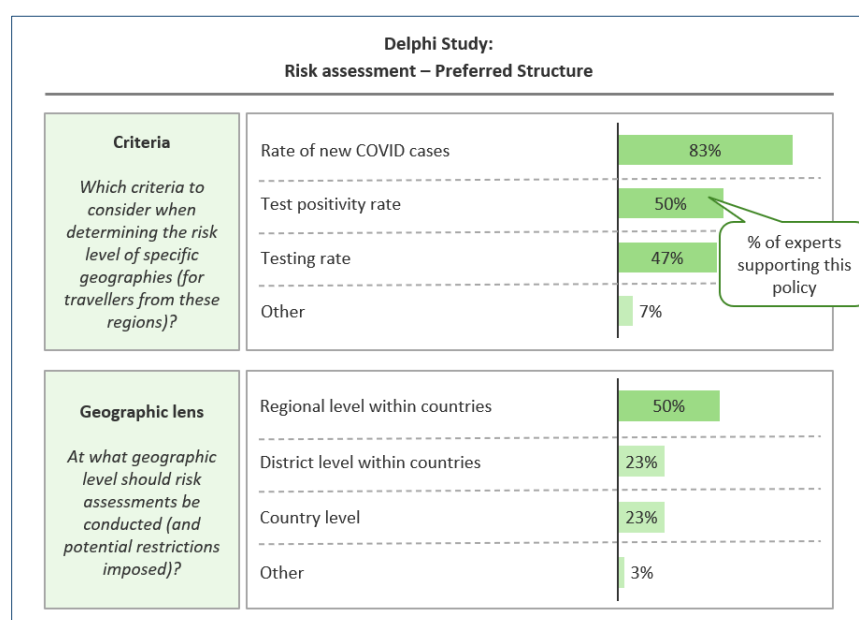


Results of the Delphi study are summarised along these three topics.

## Delphi expert views – (i) Globally-aligned risk assessment

**Criteria:** Delphi participants generally support evidenced-based, scientifically-driven decision making for policies restricting travel and movement of people. The criteria currently widely used in the European Union are seen as pragmatic and workable: Rate of new COVID cases; test positivity rate; testing rate.

Delphi participants are specifically keen on highlighting the upside that an internationally-aligned risk assessment framework can bring to travellers: *“Travelers need to be aware of the number of cases in the [destination and country of origin] to make an informed choice whether to travel or not”; “considering confirmed new cases, testing rates, and percent positivity together gives us a fuller picture of COVID-19 in a particular state or region. Under these conditions and stable testing practices, trends in daily cases can be cautiously interpreted as trends in transmission of the virus. Leaders can then make informed decisions about control measures.”*



**Geographic level:** >70% of respondents call for a more granular approach than the currently widely-used country-level risk assessment.

Delphi participants have a preference for risk assessment to be assessed on a regional level (regions within a country), which is supported by 43% of respondents; another 29% opt for more granular district-level assessment. *“It is preferable to avoid blanket country-wide restrictions and allow assessment of risk on a regional level to facilitate travel to islands and regions where the risk to travellers is sufficiently low.”; “it is very important to break up the data to levels that will enable the economy to continue operating while the fight against the virus continues. Particularly in the island destinations, we have found [that] recommendations that affected the entire region (set of islands) [do not work well] when not all the insular territories had equal contagion levels”; “population is potentially too porous [for restrictions to apply to] district levels, but regional level is easier to manage”*

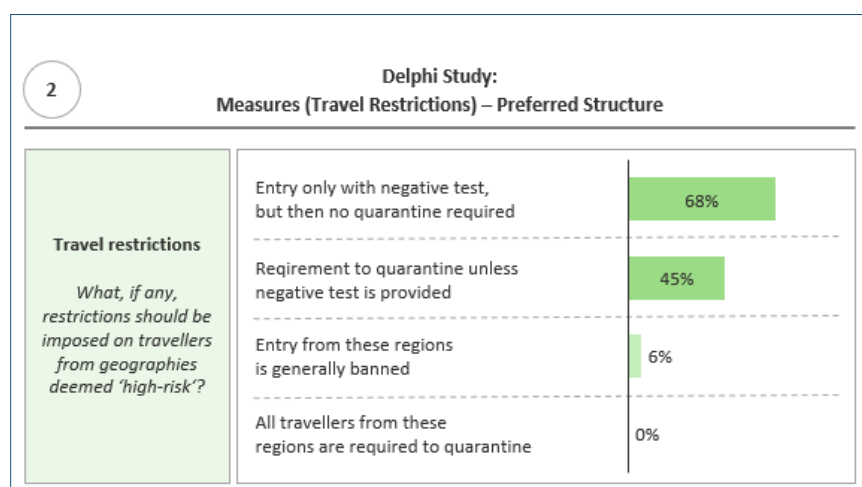
## Delphi expert views – (ii) Globally-aligned travel restrictions

**Globally-aligned travel restrictions:** A rigorous testing regime is seen as the most crucial step to restart the international travel & tourism sector. None of the experts supports the currently widely-applied blanket quarantine rules.

Almost all experts opt for a more nuanced approach, enabling travellers to enter from ‘high risk’ geographies if a negative test is provided:

- 68% suggest to only permit entry into another territory when a negative test can be provided
- 45% would also permit entry without a negative test but require those travellers to go into quarantine

*“[Governments should] enable travellers from high-risk geographies to provide a negative test before travelling”; “replace blanket quarantine requirements with the requirement to test before entering the destination country”; “tests rather than [outright] travel bans; we urgently need a testing solution to avoid quarantine”; “PCR tests have to be part of our new travel world until a treatment or vaccine would be effective against the virus”; “testing at airports or immediately after arrival or before departure is successfully being used in a number of countries. Quarantine effectively stops all travel”; “very important to find the balance between economy and health. We have to live with this virus and with other successive ones that may appear. Restrictions should be thoughtful and informed and appeal to individual responsibility so that situations of confinement do not happen again”; “without a globally harmonised standard it will be imperative for local markets to implement local guidelines on COVID-19”*

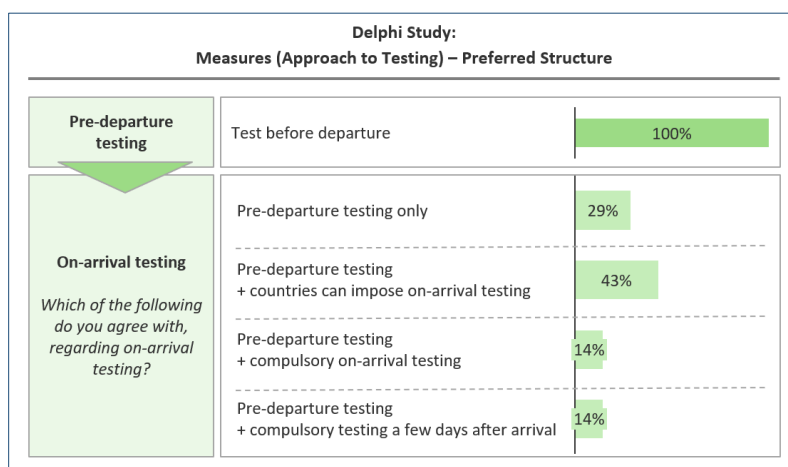


**Approach to testing:** All experts agree that **testing should be required before departure** from ‘high-risk’ geographies. To avoid testing errors and taking into account potential infection during the trip, the vast majority of experts (71%) also support **some form of testing upon or after arrival**: c.2/3 of these suggest that countries can impose individual ‘post arrival’ testing regimes, c.1/3 would rather see some compulsory on-arrival or post-arrival testing.

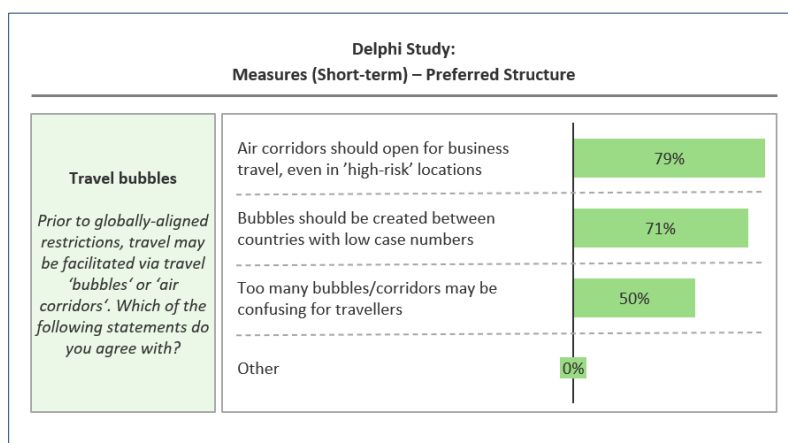
- 100% of experts demand testing before travelling to replace blanket quarantine rules: *“It is essential that the testing be done before departure. This is the only way to have safe destinations”; “the ultimate aim must be a reciprocal pre departures model but to get to that*

point”; “it would help to have international recognition that all countries are working towards a Common International Standard of pre-departures testing to show the combined objective”; “a phased approach would appear appropriate. Domestic regime is needed in the UK to restart travel and boost confidence that international travel can be done safely without the risk of re-importing cases. Phase two should be test on departure, with international coordination, with agreements between participating countries to remove their own domestic restrictions as part of a co-operative testing regime”; “the easier the better to get tourism moving again”

- In addition, c.70% also call for testing after arrival: “[Testing should be done] before departure and after arrival – they may become infected on the route”; “the issue is that there are tests with varying level of accuracy today. With 100% accurate tests, only a test at departure could suffice”; “current testing solutions do not appear to provide the necessary confidence to avoid quarantine altogether, although they can be used for ‘test and release’, but leaving open the possibility that this could be the situation in future”



**Short-term solutions – air corridors and travel bubbles:** In the short-term, prior to globally-aligned travel restrictions, experts strongly support the creation of air corridors and ‘travel bubbles’.



- 79% are in favour of opening air corridors for business travel between important destinations. In case of ‘high-risk locations’, experts opt for a strict testing regime pre- and post-flight.
- 71% also support the creation of ‘travel bubbles’ between countries with low case numbers.

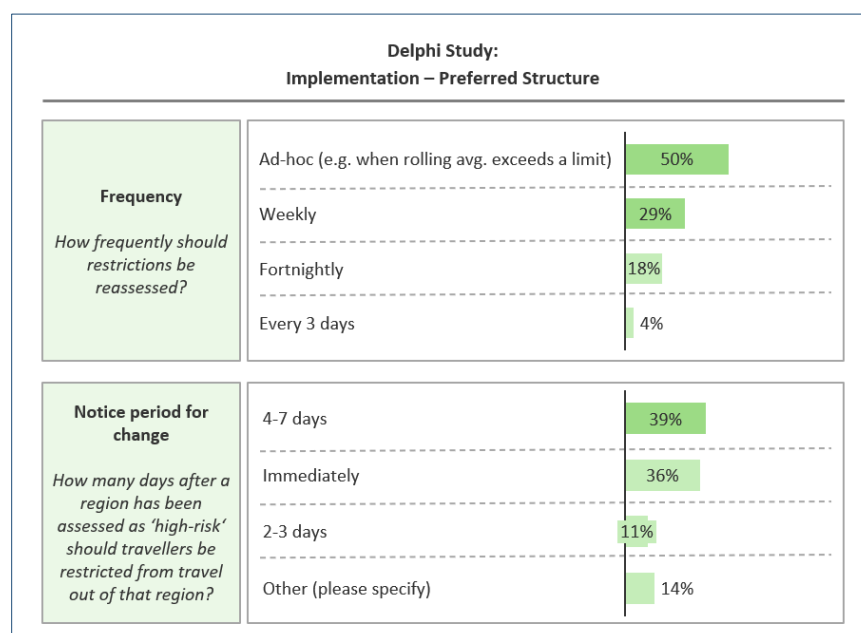
### Delphi expert views – (iii) Swift but well-communicated implementation

**Frequency of risk assessment:** Participants of the Delphi study are keen on continuous evidence-based re-assessment of travel restrictions:

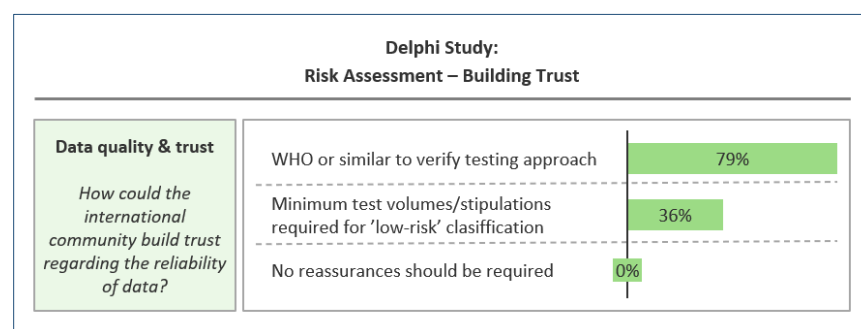
- 42% opt for ad-hoc reassessment of travel restrictions, i.e. whenever a rolling average exceeds the pre-defined limit; another 37% opt for weekly reassessment

**‘Notice period’ for changes:** Only 1/4 of respondents want revised restrictions to come into effect immediately, most are keen on a reasonable ‘notice period’ for travellers.

- 47% would prefer 4-7 days’ notice period; 16% would opt for 2-3 days’ notice period. *“Travelers need time to prepare”; “this allows enough time for travellers to make alternative arrangements.”*



**Data quality and trust:** Experts are keen for the WHO World Health Organisation or a similar international organisation to verify the testing approach across countries to ensure quality of risk assessment and to build mutual trust in an internationally-aligned approach to testing and travel restrictions.



## 2.1.b UNWTO and WTTC Recommendations

### UNWTO policy recommendations

In their Global Guidelines to Restart Tourism<sup>1</sup>, UNWTO calls for a **higher level of international coordination** in terms of travel restrictions:

- Harmonize travel and tourism related health protocols and procedures at global level and work towards the international interoperability of visitors' tracing apps.
- Restrictions should be informed by an evidence-based assessment of the public health risk and regularly revised to ensure they remain proportionate
- Ideally, risks should be to be mitigated at departure/arrival
- Ensure coordination of relevant policies and measures among tourism, health, interior and transport authorities and civil society entities representing the traditionally marginalized groups.
- Consistent and reliable information regarding travel restrictions should be made easily available
- Re-opening of borders should be regionally and internationally coordinated
- Enhance the use of technology for safe, seamless and touchless travel.
- Governments & regional blocks to advance travel facilitation towards e-visa/visa on arrival/ no visa policies and temporary visa cost exemption to stimulate demand

### WTTC policy recommendations

WTTC has repeatedly called for a **more coordinated approach to travel restrictions** via several recent publications (To Recovery and Beyond<sup>2</sup>, Letters to the G7<sup>3</sup>, 100 Million Jobs Recovery Plan<sup>4</sup>):

- International cooperation is critical to ensure the effective restart of the Travel & Tourism sector.
- Governments should both coordinate amongst themselves and collaborate with the private sector to harmonise the timing of the lifting of travel restrictions as well as standardise contact tracing and testing requirements.
- An international framework establishing clear rules, processes and standards is crucial for the sector to resume and bring back the millions of jobs impacted.
- Quarantine measures should be modified to only apply for travellers with positive test results: Replace blanket quarantines with a more targeted and effective approach, significantly reducing the negative impact on jobs and the economy.
- The communication of such policies should be more consistent. With travellers now fearing the possibility of being stuck abroad, governments will need to provide reassurance through mutually-agreed protocols.
- Better international collaboration between governments is also urgently needed to ensure that international travel may be reopened and recover as early as possible. Having such clear-cut coordination would not only strengthen business continuity but also enhance consumer confidence and incentivise people to travel.

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<sup>1</sup> <https://webunwto.s3.eu-west-1.amazonaws.com/s3fs-public/2020-05/UNWTO-Global-Guidelines-to-Restart-Tourism.pdf> (28<sup>th</sup> May 2020)

<sup>2</sup> <https://wtcc.org/Research/To-Recovery-Beyond> (27<sup>th</sup> September 2020)

<sup>3</sup> <https://wtcc.org/COVID-19/Government-Hub/Global-coordination-to-save-the-sector> (14<sup>th</sup> August 2020)

<sup>4</sup> <https://wtcc.org/COVID-19/G20-Recovery-Plan> (7<sup>th</sup> October 2020)

WTTC also recommends **bubbles and air corridors as an intermediate step** (Call for Air Corridors between Key Global Cities<sup>1</sup>, To Recovery and Beyond<sup>2</sup>, ICAO's Public Health Corridors<sup>3</sup>)

- **For business travel:** International 'air corridors' between countries or cities with similar epidemiological situations should be considered, especially among the major international hubs: e.g. London, NYC, Paris, Dubai, Frankfurt, Hong Kong, Shanghai, Washington DC, Atlanta, Rome, Istanbul, Madrid, Tokyo, Seoul, Singapore, Moscow
- **For leisure travel:** Regional hubs or "travel bubbles" between countries can stimulate international travel in the short-term; the Baltic nations of Estonia, Latvia, and Lithuania were the first European nations to agree to open their common borders
- **For essential medical supplies:** Governments should adopt IATA's suggestions regarding Public Health Corridors (PHC), i.e. enable cargo flights to operate with minimum restrictions, on the basis that flights utilising the PHCs operate under 'clean' conditions throughout

## 2.1.c EU Commission Recommendations

The EU Commission has recently published a 'Proposal for a Council Recommendation on a Coordinated Approach to the Restriction of Free Movement' (4<sup>th</sup> September 2020)<sup>4</sup>. This contains detailed recommendations on a joint policy framework for risk assessment and corresponding travel restrictions.

### EU Commission Recommendations – Risk assessment

The Proposal lays out detailed criteria and thresholds, based on extensive discussions with and data made available by EU member states.

The proposal calls for (i) **uniform criteria for assessing COVID-19 risk:**

- Risk metrics: 14-day cumulative COVID case notification rate, and test positivity rate
- Minimal data requirements: testing rate must exceed a minimal threshold

...(ii) **uniform thresholds for risk classifications**

- 3 levels of risks ('green', 'orange', 'red'), with a 'grey' category for areas with insufficient data
- Thresholds for classifications: If the testing rate is below 250 tests per 100k people, the area is classified as 'grey' – otherwise the following thresholds apply:

...(iii) **a regional level for risk assessment**

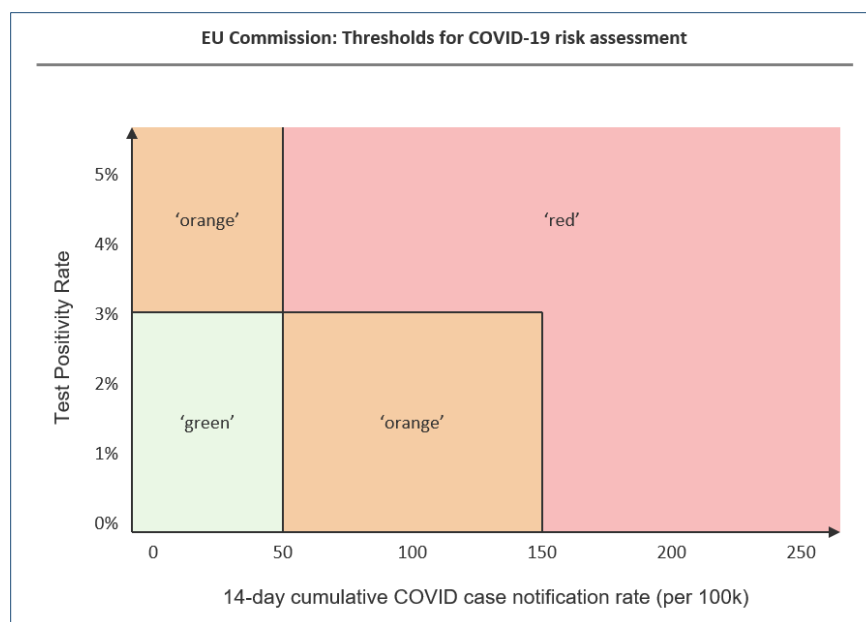
- Regions within countries are suggested as the geographic unit for risk assessment

<sup>1</sup><https://wtcc.org/Portals/0/Documents/Press%20Releases/WTTC%20calls%20for%20air%20corridors%20between%20key%20global%20cities.pdf?ver=2020-09-08-181145-267> (8<sup>th</sup> September 2020)

<sup>2</sup> <https://wtcc.org/Research/To-Recovery-Beyond> (27<sup>th</sup> September 2020)

<sup>3</sup> <https://tiaca.org/wp-content/uploads/2020/05/ICAO-Update-05112020.pdf> (11<sup>th</sup> May 2020)

<sup>4</sup> [https://ec.europa.eu/info/sites/info/files/council-proposal-coordinated-approach-restriction-movement\\_en.pdf](https://ec.europa.eu/info/sites/info/files/council-proposal-coordinated-approach-restriction-movement_en.pdf) (4<sup>th</sup> September 2020)



### EU Commission Recommendations – Travel restrictions / measures

The EU Commission lays out the following suggested measures:

(i) Principles whereby restrictions are applied between countries

- Restrictions apply based on a person's location 14 days prior to arrival
- Countries should only impose restrictions on persons travelling to/from a 'red' area within another country if they also impose the same restrictions on 'red' areas within their own country
- If a person develops symptoms on arrival at the destination, testing/diagnosis/isolation/ contact tracing should take place in accordance with local practice – entry should not be refused. Information should then be shared with health authorities of the countries the person has resided in during the previous 14 days, to allow for contact-tracing
- Restrictions should not discriminate between countries in similar epidemiological states

(ii) Measures applied to persons moving to/from 'high-risk' areas:

- Specific restrictions, by risk classification – suggestions only

Risk Classification(s)	Measures applied
<div style="background-color: #f8d7da; padding: 5px; display: inline-block;">'red'</div> <div style="background-color: #d6d8db; padding: 5px; display: inline-block;">'grey'</div>	<ul style="list-style-type: none"> <li>• Undergo a COVID test on arrival               <ul style="list-style-type: none"> <li>○ Option to take prior to departure should also be given</li> <li>○ If possible, the possibility to undergo tests should be preferred</li> </ul> </li> <li>• Undergo quarantine (if test is positive, or test not taken)</li> </ul>
<div style="background-color: #fff3cd; padding: 5px; display: inline-block;">'orange'</div>	<ul style="list-style-type: none"> <li>• Submit passenger location forms</li> <li>• [Be recommended to] take a COVID test prior to departure or on arrival</li> </ul>
<div style="background-color: #d4edda; padding: 5px; display: inline-block;">'green'</div>	<ul style="list-style-type: none"> <li>• No measures applied</li> </ul>



- Note that countries are not required to impose restrictions if these thresholds are met. Instead, the framework is intended to provide a coordinated approach in the event that individual countries decide to introduce restrictions. The decision to introduce restrictions remains the responsibility of individual countries.

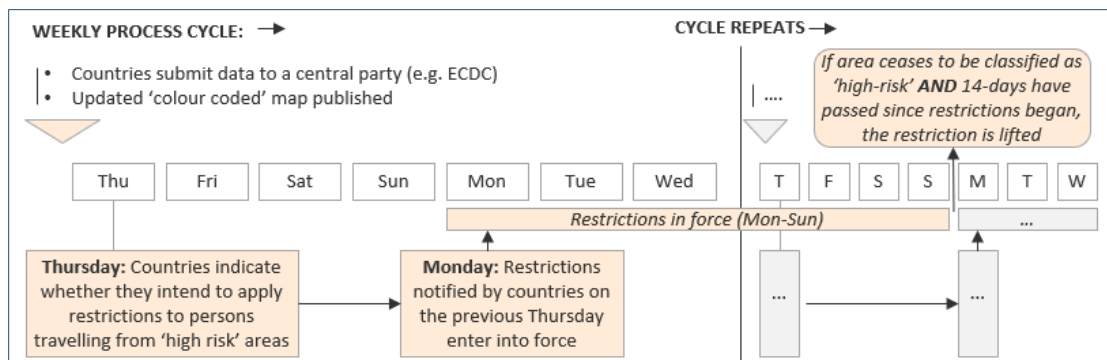
(iii) Exceptions to restrictions

- Travellers with essential functions/needs should not be required to undergo quarantine, e.g. critical/frontier/posted/seasonal workers, transport workers, persons travelling for imperative family or business reasons
- Member states should always admit their own national/union citizens and their family members resident in their territory, and should facilitate swift transit through territories

### EU Commission Recommendations – Implementation

The EU Commission lays out the following suggested process, based upon a **weekly cycle**:

- Countries submit weekly data, indicating whether thresholds are reached in a given area
- Each Thursday, countries indicate whether they intend to apply restrictions to persons travelling from 'high risk' areas; on the following Monday, measures notified by countries on the previous Thursday enter into force
- Restrictions should be lifted when an area is re-classified as 'orange' or 'green', provided that at least 14 days have elapsed since introduction



## 2.2 Global Health & Safety Protocols

In the current pandemic, global health & safety standards are widely seen as a prerequisite for any significant turnaround in the global travel & tourism industry and one of the key elements valued by travellers in their search criteria. Experts participating in the Delphi study expect that globally aligned standards could shorten the timeline to recovery by up to six months.

Both the UNWTO and WTTC have published several detailed reports on this topic:

- UNWTO released ‘Global Guidelines to Restart Tourism’<sup>1</sup> in May, including a range of health & safety protocols. More recently, UNWTO has partnered with the European Bank for Reconstruction and Development (EBRD)<sup>2</sup> to develop actions including further safety and hygiene protocols in several countries and is working with the InterAmerican Development Bank (IDB) towards regional harmonization in the Americas.
- WTTC has developed industry-wide ‘Safe Travels’ protocols<sup>3</sup>, with a large amount of protocols aimed at specific sub-sectors (hospitality, outdoor shopping, aviation, airports, tour operators, convention centres and events, attractions, short term rental, car rental and adventure tourism). Contributors to these protocols include WTTC members, UNWTO, governments, health experts and other industry associations. The protocols are intended to align the private sector behind common standards to ensure the safety of its workforce and of travellers. Government support will now be crucial to ensure these global standards can be successfully adopted.

This chapter summarises **WTTC’s ‘Safe Travel’ protocols**, in the hope of facilitating an industry-wide discussion and includes the key elements of **UNWTO’s ‘Global Guidelines to Restart Tourism’**<sup>4</sup> aimed at public and private sector.

### Results in a nutshell

Global health & safety protocols can significantly enhance traveller confidence and speed up the route to recovery. WTTC and UNWTO have both already published detailed reports, which are widely supported by industry experts. UNWTO further recalls that safety protocols need to act in mitigating the risk for travellers, workers and host communities.

In line with WTTC’s ‘Safe Travel’ Protocols, this manifesto calls for three core topics to be addressed:

- i) Operational and Staff Preparedness
- ii) Ensuring a Safe Experience
- iii) Rebuilding Trust and Confidence

To implement global standards, experts generally call on the private and public sector to collaborate more closely to find common ground for standardised health & safety protocols.

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<sup>1</sup> <https://webunwto.s3.eu-west-1.amazonaws.com/s3fs-public/2020-05/UNWTO-Global-Guidelines-to-Restart-Tourism.pdf> (28<sup>th</sup> May 2020)

<sup>2</sup> <https://www.unwto.org/news/ebd-and-unwto-partner-to-boost-tourism-recovery>

<sup>3</sup> <https://wtcc.org/COVID-19/Safe-Travels-Global-Protocols-Stamp> (accessed variously during October 2020)

## 2.2.a Delphi Study and Ministers' Summit Contributions

**Experts who participated in the Delphi study** see global health and safety standards as a crucial and immediate next step to move the travel & tourism sector towards medium-term recovery. More standardised, global health and safety protocols could ensure a consistent and safe travel experience that travellers can be confident in.

**Safety protocols** are generally seen as the #1 priority for rebuilding traveller confidence:

- Best-practice H&S standards (seen as a priority by 80%)
- Traveller flexibility and control, e.g. around re-booking (60%)
- Safety technology, e.g. self-cleaning solutions (20%)

The importance of global health and safety standards is further emphasised by their potential to accelerate the route to recovery for the global travel & tourism sector: experts participating in the Delphi study expect that better aligned health and safety standards (e.g. hygiene protocols, infection management) could shorten the timeline for industry recovery by c.6 months, thus cutting short the currently expected 31 months for sector spend to reach pre-crisis levels to c.25 months.

At the **Ministers' Summit**, panellists equally emphasised the importance of safety protocols:

- Gloria Guevara, CEO WTTC: *"AT WTTC, we took the approach to define the international protocols for the hotels, for MICE, for tours etc., to make sure the travellers experience is the same, is standardised. To give you an example: The Philippines have a certification process in place; they define the protocols – what we gave to the Philippines is the recognition that the protocols are at the same level as for the global private sector; that is the 'Safe Travel Stamp'; it's not a certification, it is a recognition that the protocols are at the highest level, and that you as a traveller have the same experience if you go to a hotel in Manila, London or NYC"*
- Harry Theoharis, Minister of Tourism, Greek National Tourism Organisation: *"What we did, which is similar to other countries, was a lot of focus on health protocols, ensuring that we train all employees, that the standards are up to scratch and adhered to; [...] take our cruise industry, which is so important for Greece: Bad publicity for the cruise industry at the beginning of the crisis meant that the fear factor was much higher; but we have seen recently that the health protocols which are stricter in the cruise industry have been implemented in such an exemplary way that we don't have any real problems in Greece"*

## 2.2.b UNWTO and WTTC Recommendations

### UNWTO Guidelines

UNWTO Global Guidelines to Restart Tourism ( <i>excerpt</i> )	
1. Safe and Seamless Border Management	<ul style="list-style-type: none"> <li>• Introduce and adapt border processes &amp; procedures in line with public health evidence-based risk assessment</li> <li>• Define roles and responsibilities for governments, private sector and travellers</li> <li>• Ensure regional and international coordination in the re-opening of borders</li> <li>• Revise regularly travel restriction &amp; protocols using best available information from leading international health authorities to ensure they remain proportionate to the public health threat and local risk assessment</li> <li>• Enhance the use of technology for safe, seamless and touchless travel</li> <li>• Provide reliable, consistent &amp; easy to access information on travel restrictions and protocols to the private sector and to travellers</li> <li>• Ensure coordination of relevant policies and measures among tourism, health, interior and transport authorities</li> <li>• Harmonise travel and tourism related health protocols and procedures at global level and work towards the international interoperability of visitors' tracing apps</li> <li>• Mitigate risks at departure and/or arrival</li> <li>• Governments &amp; regional blocks to advance travel facilitation towards e-visa/visa on arrival/no visa policies and temporary visa cost exemption to stimulate demand</li> </ul>
2. Private Sector – Crosscutting Measures	<ul style="list-style-type: none"> <li>• Implement global and harmonized health, safety and hygiene protocols</li> <li>• Train the personnel in safety and security protocols as well as safe-service delivery</li> <li>• Communicate protocols and responsibilities to the customers, and keep them informed onsite and through digital and social media</li> <li>• Clean all surfaces more frequently, using products and disinfectants that meet requirements with special attention to high-touch surfaces</li> <li>• Set up plan in the event a guest or employee falls ill on site</li> <li>• Create an internal COVID-19 coordination committee to follow-up on implementation and execution of protocols and service delivery</li> <li>• Redesign processes to more digital touchless operations in all possible touch-points</li> <li>• Keep record of statistical information for tourism planning and management in full coordination with local and national tourism and statistical authorities</li> <li>• Promote social dialogue and work to ensure the health and wellbeing of workers and the working environment (support employees in monitoring their health and adapt Human Resources policies)</li> <li>• Engage in public/private sector dialogue and recovery mechanism.</li> </ul>
3. Safe Air Travel	<ul style="list-style-type: none"> <li>• Hygiene and Operations               <ul style="list-style-type: none"> <li>– Implement proportionate health check procedures as appropriate according to risk assessment</li> <li>– Deepen and increase the frequency of aircraft and cabin cleaning</li> <li>– Consider providing masks for passengers and crew and ensuring their use during the whole flight</li> <li>– Implement boarding &amp; deplaning processes that reduce contact with other passengers or crew in respect of physical distancing rules</li> <li>– Limit movement within the cabin during flight</li> <li>– Simplify catering and other procedures that lower crew movement</li> <li>– Facilitate people not sitting next to each other where load factors make it possible</li> <li>– Provide in-flight sanitizing tissues to passengers and crew members</li> </ul> </li> </ul>

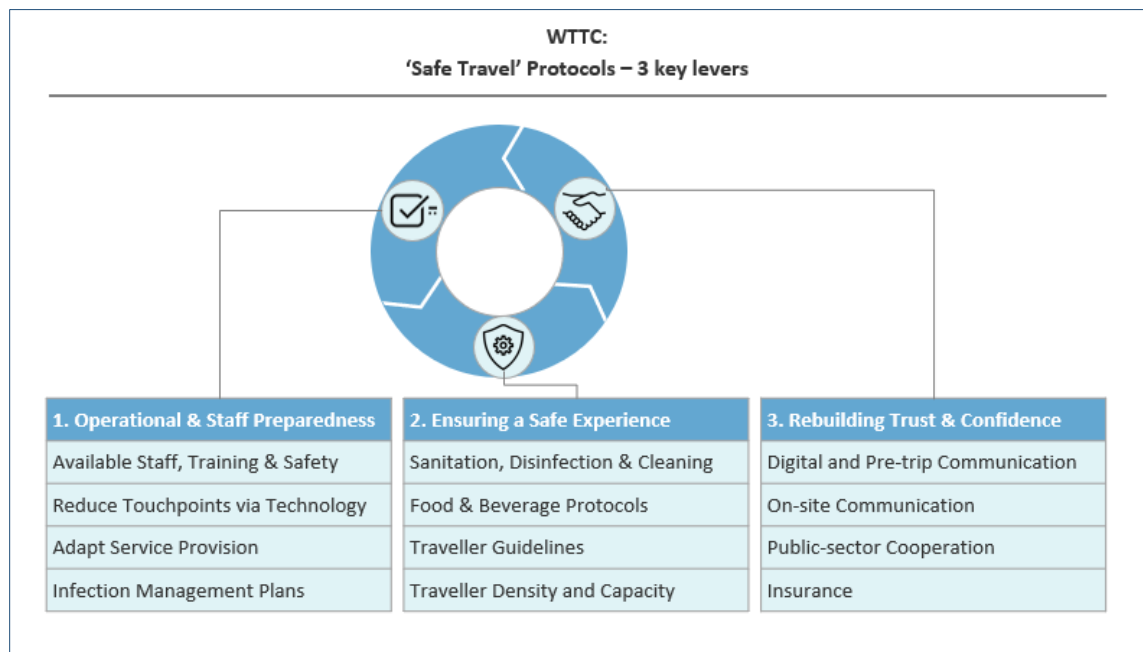
	<ul style="list-style-type: none"> <li>– Reduce the number of objects in the cabin and limit hand luggage</li> <li>• Partnerships <ul style="list-style-type: none"> <li>– Promote airport cost relief including government financial assistance.</li> <li>– Ensure coordination with governments, airports and other relevant players as well as ICAO's processes, including national coordination mechanisms.</li> </ul> </li> </ul>
4. Hospitality	<ul style="list-style-type: none"> <li>• Hygiene and Operations <ul style="list-style-type: none"> <li>– Increase the frequency of cleaning in common areas and contact surfaces</li> <li>– Inform guests about existing protocols in an easy and updated manner (e.g. time of the last cleaning, contact of health manager, etc.)</li> <li>– Explore new methods such as electrostatic sprays, ultraviolet light, amongst others</li> <li>– Implement contactless check-in and provide guests with a hygiene welcome kit (including gloves, masks, sanitizer).</li> <li>– Learn more about guest in advance to provide a more personalised service</li> <li>– Keep spare rooms for possible sick or quarantine guests</li> <li>– Keep physical distancing for the use of all common spaces</li> <li>– Introduce technological systems such as "guest messaging" for direct and rapid contact with guests for reservations, refunds, cancellations or possible information about infections</li> <li>– Foster flexibility for operations</li> <li>– Create positions such as hygiene manager and guest guardian</li> </ul> </li> <li>• Product and Marketing <ul style="list-style-type: none"> <li>– Add new services such as food delivery or take-away (picnic) service, family experiences, co-working spaces, drive &amp; stay packages, etc.</li> <li>– Promote proximity and domestic tourism in the short-term enhancing the local value chain (e.g. local producers)</li> <li>– Implement marketing campaigns to communicate corporate values and support to local providers and workers</li> </ul> </li> <li>• Partnerships <ul style="list-style-type: none"> <li>– Partner with health and safety brands and health providers</li> <li>– Generate alliances with health centres and providers</li> <li>– Partner with local providers, local destination management organizations and other players in the sector</li> </ul> </li> </ul>
5. Tour Operators & Travel Agencies	<ul style="list-style-type: none"> <li>• Hygiene and Operations <ul style="list-style-type: none"> <li>– Facilitate int'l voucher redeeming for local / domestic packages and products</li> <li>– Implement health and safety protocols &amp; promote digital communication</li> </ul> </li> <li>• Product and Marketing <ul style="list-style-type: none"> <li>– Develop segmented and sustainable products focused on nature, rural areas and culture: eco-tourism, small group or individual sports, history, bird-watching tourism, traditional routes</li> <li>– Introduce storytelling for creating new tourism experiences</li> <li>– Create personalized and small group tours and packages</li> <li>– Incentivise domestic tourism, short trips and visits to nearby destinations</li> <li>– Promote rent-a-car services and combined hotel &amp; car packages</li> </ul> </li> <li>• Partnerships <ul style="list-style-type: none"> <li>– Create alliances with the financial sector to promote deferred tour packages at interest-free instalments</li> <li>– Increment accrual of miles and reinforce point-based loyalty reward systems for purchases of tour packages in alliance with airlines</li> <li>– Promote new destinations and experiences with added value and local inspiration namely with the creative industries to generate novelty in the market</li> <li>– Coordinate with insurance companies to offer complete or 100% coverage</li> </ul> </li> </ul>

6. Meetings & Events	<ul style="list-style-type: none"> <li>• Hygiene and Operations <ul style="list-style-type: none"> <li>– Offer packed meals (avoid buffet service or coffee breaks) with due respect for sustainability options</li> <li>– Develop specific meeting planners guides to restart operations</li> </ul> </li> <li>• Product and Marketing <ul style="list-style-type: none"> <li>– As a first step, create digital events with high-level speakers, technological innovation and relevant content</li> <li>– Analyse the option to sell “tickets” to these events based on additional features such as B2B options</li> <li>– Offer value added post-event services such as reports &amp; training</li> <li>– Provide free access to certain parts of the events in order to obtain a base of social media followers.</li> <li>– In a further stage, offer traditional mid-size events for the domestic market (according to local regulations and health protocols), particularly for specialized segments (e.g. medical)</li> </ul> </li> </ul>
7. Attractions & Thematic Parks	<ul style="list-style-type: none"> <li>• Hygiene and Operations <ul style="list-style-type: none"> <li>– Allow people to enjoy the facilities and encourage the use of masks/face coverings</li> <li>– Reduce touch areas where possible and sanitize high touch surfaces frequently.</li> <li>– Protect employees with various approaches, including barriers, protective coverings, and distancing</li> <li>– Manage density of people within the facilities to keep people or family units and define protocols for the flow path of visitors and the use of common spaces</li> <li>– Reduce or manage capacity to allow for appropriate social distancing and monitor entrance and venue capacity at all times to ensure guests can maintain physical distancing within the space</li> <li>– Communicate protocols and responsibilities to the guests</li> <li>– Place signs or markings on the pavement to outline physical distancing</li> <li>– Encourage online payments and pre-bookings</li> <li>– Implement new technologies such as augmented reality or virtual reality to improve visitors’ experience before, during and after a visit</li> </ul> </li> </ul>
8. Destination Planning & Management	<ul style="list-style-type: none"> <li>• Introduce and adapt actionable and harmonised processes &amp; procedures in line with public health evidence-based risk assessment and full coordination with relevant public and private sector partners</li> <li>• Support companies in the implementation and training of their staff on the new protocols (financing &amp; training)</li> <li>• Enhance the use of technology for safe, seamless and touchless travel</li> <li>• Provide reliable, consistent &amp; easy to access information on protocols to the private sector and to travellers (send SMS to tourists to inform them of national and local health protocols and relevant health contacts)</li> <li>• Create programmes and campaigns to incentive the domestic market in cooperation with the private sector (incentive schemes, possible revision of holiday dates, transport facilities, vouchers, etc) and integrate destinations</li> <li>• Promote new products &amp; experiences targeted at individual &amp; small groups travellers, like: special interest, nature, rural tourism, gastronomy &amp; wine, sports, etc.</li> <li>• Consider the data privacy policies when there is a proposal of developing tracing apps; WHO will develop guidance on the use of digital technologies for contact tracing</li> <li>• Enhance and communicate medical capacity &amp; protocols at the destination</li> <li>• Ensure coordination among tourism, health and transport policies</li> <li>• Define roles &amp; responsibilities for governments, private sector and travellers</li> </ul>

## WTTC's 'Safe Travel' Protocols


The WTTC's 'Safe Travel' Protocols are aimed at a broad spectrum of travel & tourism stakeholders, covering topics along three main levers:

- i) Operational and Staff Preparedness
- ii) Ensuring a Safe Experience
- iii) Rebuilding Trust and Confidence




*Please note that the following summary is intended as an introductory overview, and is not intended as a substitute for the full protocol documents themselves. Please see the individual sector-specific documents for more details.*

## WTTC's 'Safe Travel' Protocols – (i) Operational and Staff Preparedness


	1. Operational and Staff Preparedness ( <i>excerpt</i> )
a. Staffing, Availability, Training and Safety	<ul style="list-style-type: none"> <li>• Ensure required staffing levels are available to restart operations</li> <li>• Retrain and prepare staff               <ul style="list-style-type: none"> <li>– Create and implement staff guidelines/expected behaviour regarding physical distancing and enhanced hygiene measures</li> <li>– Ensure that all staff are trained and equipped to respond to guests' questions relating to new protocols</li> </ul> </li> <li>• Continuously monitor and encourage staff well-being               <ul style="list-style-type: none"> <li>– Communication of a stay-home policy for those displaying symptoms</li> <li>– Review employee sick leave policies and update them as needed</li> <li>– Consider staff support programmes to help manage stress</li> <li>– Ensure protective screens and PPE are provided and utilised to protect staff</li> </ul> </li> <li>• Reduce overall workplace density               <ul style="list-style-type: none"> <li>– Establish fixed shifts to minimise risk</li> <li>– Encourage work-from-home support (where possible)</li> <li>– Impose physical distancing in office layouts, and limit the number of staff in common back-of-house areas</li> </ul> </li> </ul>
b. Reduce Touchpoints via Technology	<ul style="list-style-type: none"> <li>• Minimise touch contact by digitizing traveller services               <ul style="list-style-type: none"> <li>– E.g. contactless payments, touchless check-in/check-out, self-service machines, digital queue management, e-menus, electronic traveller declarations</li> <li>– Provide complimentary WIFI to encourage use of digital services</li> <li>– Accelerate the implementation of biometrics where possible</li> </ul> </li> <li>• Encourage efficient traveller processing via prior preparation, e.g.               <ul style="list-style-type: none"> <li>– Encourage travellers to pre-purchase tickets online</li> <li>– Conduct check-in online wherever possible</li> <li>– Encourage home preparation e.g. pre-printed bag tags</li> </ul> </li> </ul>
c. Adapt Service Provision	<ul style="list-style-type: none"> <li>• Certain processes/services require modification to ensure safety</li> <li>• Consider changing the location of activities etc. to avoid high-traffic areas</li> <li>• Encourage passengers to minimise the number of personal items brought (e.g. as cabin baggage, or into an attraction)</li> <li>• Modify or suspend services that represent a health &amp; safety risk               <ul style="list-style-type: none"> <li>– Processes initiating close-contact between staff and travellers; e.g. sales assistance, airport pat-downs</li> <li>– Services that are poorly-suited to physical distancing, e.g. locker arrangements, playgrounds, ATMs</li> <li>– Lending or provision of communal items to travellers, e.g. in-flight cabin material</li> </ul> </li> </ul>
d. Infection Management Plans	<ul style="list-style-type: none"> <li>• Develop a checklist of actions for infection management and prevention; should include               <ul style="list-style-type: none"> <li>– Infection control, including special cleaning and disinfection plans</li> <li>– Processes to isolate symptomatic or quarantining travellers, where applicable – e.g. isolation units, spare rooms</li> </ul> </li> </ul>
e. Other Operational Preparations	<ul style="list-style-type: none"> <li>• Ensure that relevant partners and suppliers have implemented appropriate measures</li> <li>• Obtain appropriate licenses from local government</li> <li>• Assess procedures relating to HVAC systems, aim to reduce potential infection spread               <ul style="list-style-type: none"> <li>– Where possible, ventilate through open windows to allow fresh air into work environments and ensure that air conditioning systems circulate good quality air.</li> <li>– Set up internal COVID-coordination committees to implement protocols and service delivery</li> </ul> </li> </ul>



## WTTC's 'Safe Travel' Protocols – (ii) Ensuring a Safer Experience

	2. Ensuring a Safe Experience ( <i>excerpt</i> )
a. Sanitation, Disinfection and Cleaning	<ul style="list-style-type: none"> <li>Implement enhanced staff sanitisation, disinfection, and cleaning practices, at increased frequency               <ul style="list-style-type: none"> <li>Specific focus on high-frequency touch points (e.g. washrooms, handrails, tables)</li> <li>Utilising disinfecting products approved by health authorities</li> <li>Increased frequency of waste disposal, with bins utilising liner bags</li> <li>High-contact items (e.g. towels, outdoor gear) should be cleaned using high-heat methods approved by national government and health authorities</li> <li>Extraneous items should be removed from premises wherever possible</li> </ul> </li> <li>Create sanitisation stations to provide travellers with approved disinfecting products               <ul style="list-style-type: none"> <li>In the form of alcohol-based or hypochlorous acid water hand sanitiser</li> <li>Located in high-traffic</li> <li>Additional disinfecting products to be made available for travellers to purchase</li> </ul> </li> <li>Evaluate innovations for cleanliness and disinfection where possible:               <ul style="list-style-type: none"> <li>E.g. foggers, electrostatic spraying technology, EPA based filtration</li> <li>Particularly for large institutions, with validation from expert bodies and governmental institutions (e.g. WHO), who should share best-practice approaches</li> </ul> </li> <li>Utilise health and temperature checks where relevant               <ul style="list-style-type: none"> <li>May cover staff, travellers, and partners/contractors</li> </ul> </li> </ul>
b. Food & Beverage Protocols	<ul style="list-style-type: none"> <li>Avoid participant handling of food at e.g. buffets</li> <li>Clean machines handled by guests regularly – or ideally, ensure they are operated by staff</li> <li>Create water/soft drink protocols, whereby travellers are recommended to refill their own bottles in areas where there is safe drinking water</li> <li>Consider minimising items placed on tables; provide mono-packaged items if feasible</li> <li>Implement food protocols and guidelines relating to outsourced food</li> <li>Room service, offered via no-contact delivery, should be an option where relevant</li> </ul>
c. Traveller guidelines:	<ul style="list-style-type: none"> <li>Clear, consistent and up-to-date instruction should be provided to travellers regarding their responsibilities and requirements, including e.g.:               <ul style="list-style-type: none"> <li>Wearing of masks; guidance on hand hygiene</li> <li>Distancing guidelines – overall and/or by area (e.g. queues, elevators)</li> </ul> </li> </ul>
d. Traveller Density and Capacity	<ul style="list-style-type: none"> <li>Monitor the number of travellers in any given space, and disperse where required</li> <li>Assess capacity reductions required to allow for successful distancing:               <ul style="list-style-type: none"> <li>Identify and enforce realistic capacities that will allow for physical distancing</li> <li>Minimise group sizes (e.g. tours); group together households/families</li> <li>Stagger entry/exit times, and encourage and assist travellers in taking extra time when entering and exiting locations</li> <li>Extend hours to increase traveller numbers, without compromising on safe limits</li> </ul> </li> <li>Make arrangements for seating and dense common areas:               <ul style="list-style-type: none"> <li>Implement spacing where possible (reducing/blocking out seating, e.g. in restaurants, airport terminals, ski lifts)</li> <li>Adopt allocated seating plans with no rotation</li> <li>Aviation: Modify seat boarding processes (particularly planes, e.g. from back to front, window to aisle)</li> <li>Make all efforts to provide a speedy baggage claim process and ensure that passengers are not made to wait for excessive amounts of time in baggage claim area. Considered use of multiple belts to allow for physical distancing</li> </ul> </li> </ul>

## WTTC's 'Safe Travel' Protocols – (iii): Rebuilding Trust and Confidence

	3. Rebuilding Trust & Confidence ( <i>excerpt</i> )
a. Digital and pre-trip communication	<ul style="list-style-type: none"> <li>• Clear, consistent, and enhanced communication with travellers, regarding all responsibilities, protocols, restrictions and advice               <ul style="list-style-type: none"> <li>– E.g. traveller guidelines, advice on pre-travel preparation, encouragements to reduce the number of personal items brought</li> <li>– Via a range of channels – e.g. online, social media, SMS-pre-arrival etc.</li> </ul> </li> </ul>
b. On-site communication	<ul style="list-style-type: none"> <li>• Implement clear signage throughout the environment               <ul style="list-style-type: none"> <li>– To inform guests of enhanced cleaning protocols, physical distancing requirements, and recommendations</li> <li>– Particularly highlighting requirements in 'high-contact' areas (e.g. lifts, queues)</li> </ul> </li> <li>• Traveller-facing/front office staff should be trained to answer questions</li> </ul>
c. Public-sector Cooperation	<ul style="list-style-type: none"> <li>• Cooperate with national authorities on               <ul style="list-style-type: none"> <li>– Contact tracing apps; ideally via global standards for electronic contact tracing</li> <li>– Traveller responses to pre-travel questionnaires/self-declarations – mutually recognised by governments, to not incur delays at arrival</li> <li>– Work e.g. local government and tourism authorities to explain the protocols and encourage them to be advocates</li> </ul> </li> <li>• UNWTO recommendations:               <ul style="list-style-type: none"> <li>– Record statistical info for tourism planning and management by local/national authorities</li> <li>– Provide clear consistent messaging to the media</li> </ul> </li> </ul>
d. Better provision of travel insurance	<ul style="list-style-type: none"> <li>• Collaborate with third-party providers to offer COVID travel insurance at point-of-sale               <ul style="list-style-type: none"> <li>– Conduct an audit of any existing insurance policies to identify risks/gaps in coverage, and look to source the right partners and providers to ensure appropriate coverage moving forward</li> <li>– Identify areas where insurance was not procured and could in the future mitigate risks and provide protection for the traveller, host countries, and providers</li> <li>– Enhance awareness of the terms and conditions, restrictions, and coverage limits of the insurance products</li> </ul> </li> <li>• Create blanket insurance and crisis management coverage to give comfort to clients, members, travellers, and passengers, and mitigate COVID-19-related risks for hosting countries (e.g. business travel medical/business travel accident coverage for corporate travellers, as well as blanket plans for the travelling public)               <ul style="list-style-type: none"> <li>– Help travellers concerned with repatriation in case they become sick</li> <li>– Consider health insurance to cover the cost of hospital/medical care</li> <li>– Trip cancellation/trip interruption coverage in case the travel arrangements are cancelled or interrupted</li> <li>– Potential coverage option: provide at least a minimum base of coverage on a mandatory basis to ensure each traveller has some level of protection, including for COVID-19 risks</li> </ul> </li> <li>• Educate travellers unfamiliar with insurance of the risks they are exposed to, what coverage they should look for, and encourage them to be updated on government requirements of any countries they are travelling to/from</li> </ul>

## WTTC's 'Safe Travel' Protocols – Other 'Safe Travel' Protocols (Sector-Specific)

Other Sector-Specific Initiatives ( <i>excerpt</i> )	
a. Aviation	<ul style="list-style-type: none"> <li>• Ensure flexibility in slot allocation practices to match demand</li> <li>• Conduct entry/exit screening in a walk-through, non-intrusive manner (e.g. full body infrared scanners, handheld thermometers) – common approach amongst states</li> <li>• Direct travellers, in advance of departure, to government mandated pre-arrival risk assessment questionnaire/ self-declaration electronic portals where governments provide an industry-wide standard through which travellers provide data on the basis of which they can be boarded. This should be undertaken by government entities to provide the results directly to travellers. Such measures should be mutually recognised by governments to not incur delays at arrival</li> <li>• Have governments lead the implementation of robust COVID-testing directly with passengers (non-intrusive, short timeframe) and communicate fly/no-fly results to airlines</li> <li>• Limit as much as possible the amount of movement in the cabin</li> </ul>
b. Attractions	<ul style="list-style-type: none"> <li>• Design and share visual of floor plans and layouts to showcase preparedness</li> <li>• For rides, recommend use of face masks, ensuring they do not present a loose-article hazard. When physically verifying the safety, gates are locked and secured, operators should disinfect if using their hands</li> <li>• For water park operations, evaluate closing or removing hands-on, interactive features within play structures if they are not covered in treated pool water</li> </ul>
c. Outdoor	<ul style="list-style-type: none"> <li>• Change service provision <ul style="list-style-type: none"> <li>– Specific activity risk assessment of each adventure activity to determine the measures required, such as physical distancing, the wearing of face-coverings, as the risk amongst Adventure Travel Activities varies</li> <li>– Ensure activity difficulty levels do not exceed guest ability and skill, thus decreasing the need for a possible rescue</li> <li>– Ensure, where possible, that each guest can handle their own equipment and gear for the duration of the trip. Where possible, guests should be encouraged bring their own equipment or gear, such as bikes, skis and helmets among others</li> </ul> </li> <li>• Infection Management: Monitor changing regulations and contingency plans, risk contexts in host countries and the impact on local companies and local communities among others, as applicable</li> </ul>
d. Adventure tourism	<ul style="list-style-type: none"> <li>• Remind guests that where there is a risk of falling in water, the use of face coverings is not advised, for instance in some sections of a rafting activity</li> <li>• For the transportation of guests between meeting points, such as rafting, cycling and trekking routes, consider mandatory face coverings, distancing or even separate transport where possible, also taking into account the duration of the trip and ventilation of transport</li> <li>• For wildlife safaris, remind guests to maintain distance from wildlife. Whilst there have been very few cases of human to animal virus transmission, there is very little science or evidence to prove that humans cannot transmit the virus to animals; such transmission could have devastating consequences on endangered species</li> </ul>
e. Shopping	<ul style="list-style-type: none"> <li>• Create protocols for brand partners which observe government mandatory trading hours, delivery hours, packaging disposal, merchandise to shop floor procedures and product care, physical distancing requirements, fitting room occupancy, deep cleaning and sanitization and, the transition to digital receipts instead of paper</li> <li>• Implement back-of-house protocols to maintain physical distancing, increase frequency of waste management and back-of-house deep cleaning and provide location for all contractors to undergo thermal scanning</li> </ul>

## 2.3 Continued Government Support

The travel & tourism sector has been hard-hit by widespread lockdowns, border closures and travel restrictions, and continues to be severely impacted by the second wave of COVID-19 infections. This extensive impact, together with the high relevance of the travel & tourism sector for the global economy, highlight the need for targeted government support.

This chapter gives summarises the findings from the Delphi study, reviews policy recommendations by UNWTO and WTTC, and gives a detailed overview of strong government policies implemented around the world (based on UNWTO and WTTC documentation).

### Results in a nutshell

Continued, targeted government support is seen as **crucially important** by the **experts** participating in the **Delphi study**: Ideally, government support should be **more targeted** at the travel & tourism sector (*“one size does not fit all”*) and cover all types of players in the eco-system. Key priorities as highlighted in the Delphi study:

- Extended and improved **job retention schemes** (#1 priority)
- **Direct grants**, ideally for specific needs and/or targeted at specific type/size of companies
- **More generous exemptions** from taxes, fees and other payments (e.g. VAT, travel-specific taxes)
- **Stronger collaboration** and cooperation between the private and public sector

Given the higher importance of domestic tourism, especially short-distance tourism, experts are also asking for more public sector involvement in marketing and advertising campaigns for **local tourism**, as well as government-backed information campaigns about safety measures in the local region to build consumer confidence.

**UNWTO and WTTC** both have detailed policy recommendations, and provide an international overview of government policies.

This document summarises the spectrum of policies by which governments around the world have supported the sector, structured around 4 areas according to the regularly updated information provided by UNWTO at its Tourism Policy Tracker <sup>1</sup>:

- Fiscal and Monetary (76% of countries worldwide have implemented respective policies)
- Jobs & Training (56%)
- Kick-starting Tourism – domestic and international (64%)
- Market Intelligence and Public-Private Partnerships (49%)

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<sup>1</sup> <https://www.unwto.org/covid-19-measures-to-support-travel-tourism>

### 2.3.a Delphi Study and Ministers' Summit Contributions

As the COVID-19 pandemic continues to evolve through Q4 2020, Delphi participants are unanimous that the travel & tourism sector requires continued, targeted government support to successfully navigate this crisis. Participating experts point towards the need to support the sector with bold moves – across various sub-sectors and company sizes.

- **Need for specific support, targeted at the travel & tourism sector:** *"All Tourism companies [require support], especially SMEs"; "the more all-round support, the better"; "focus on supporting all travel & tourism businesses"; "all businesses which [can't] survive long periods of inactivity... require support"; "our sector is one of the most affected and have received no tailored support. We cannot keep staff in jobs when there is no work until demand returns."*
- **SMEs require specific support – but larger companies should not be neglected:** *"c.70% of SMEs [in our country] require financial assistance as a priority", "SMEs in the tour operating and travel agency sectors are under particular pressure. Specific support is needed to maintain employment"; "... small ones need liquidity", "access to interest free loans and schemes to support jobs are what SMEs in particular need to ride the storm"; "reminder that the larger companies employ larger groups of people that will result in greater losses if not sustained"*
- **Need for support extends across all types of players:** *"Small to Medium DMCs need support to help sustain their business", "SMEs in both the Tour Operating and Travel Agency sectors are under particular pressure"; "the cruise sector is effectively closed"; "events & meetings, airlines and airports..."*
- While financial support is seen as crucial, participating experts also highlight the **need for stronger cooperation and collaboration:** *"Cooperation and collaboration will be key for stronger and sustainable recovery. Alignment and/or harmonisation of standards and actions will assist in the overall recovery"; "government support is welcome but cannot be an end in itself. It alleviates the pain but does not replace lost income. What is essential is for economies to be reopened as quickly as possible and for Government to refocus on the economy and not just on COVID"*

**Ministers' Summit panellists** similarly stressed the importance of quick and ongoing government support, some with concrete calls for action:

- Inge Huijbrechts, Global SVP Responsible Business and Safety & Security, Radisson Hotel Group: *"I think we can be **very thankful**, we have 95,000 team members in our system globally, so we are very thankful for the many support packages that have been put in place. We are a people's business and these measures to support employability, working capital and tax relief are working and they have enabled us to retain more team members"*
- Gustavo Segura Sancho, Minister of Tourism, Costa Rica: *"**Our government had a quick response** to the pandemic, which allowed us to delay the appearance of community spread by almost 6 months; not only did that help strengthen the hospital capabilities, but it gave the private sector enough time to prepare for the problems; we have received WTTC Safe Travel recognition which has also worked well as a tool to reopen safely. [...] Furthermore, our government took the initiative to discount jet fuel to incentivise air travel – a very specific initiative, but it worked well; we also took a gradual approach to reopening; allowed us to show that none of the visitors acquired the virus while in Costa Rica, enabled us to move towards a more dynamic reopening"*

- John Holland-Kaye, CEO, Heathrow: *“There are some things the government has done very well, there are some opportunities to do better, and there are some things that quite frankly they have just not got right. What went well: The adoption of a risk-based approach to opening borders is absolutely the right thing to do, and we have seen other countries following that lead [...] I think the opportunity is to come up with a practical solution for countries that are high risk, which today are most countries around the world, so that people can still fly, for tourism, for business, for visiting friends and families. And that’s where we need a common international standard of pre-departure testing, so that people are confident that no one getting on the plane has COVID and that countries, by opening the borders, are not bringing in the risk of COVID into their markets; that is something where I encourage the UK government to take a lead on and to set up a pilot of this between London and New York, which is the busiest route in the world. Things we can do better: a staggering **lack of support for the aviation sector** in the UK, in a way I have not seen in other countries around the world; business rates have been reduced for some sectors but not in aviation, the only cost we have not been able to reduce in the airport is our business rate bill, and that is something that the government needs to do something about. [...] We have also seen a lack of support for inbound tourism with changes to the VAT rule, which means that from the 1st of January travellers coming to the UK won’t be able to get their VAT back on things they buy in the UK or at the airport; that puts the UK at a competitive disadvantage, exactly at the time when we should be looking to become more competitive”*
- Nigel Huddleston, Minister for Sport, Tourism and Heritage for Digital, Culture, Media and Sport, UK Government: *“Back in March/April, none of us knew how long this would last, very different to previous shocks; and we had this specific issue that domestic, inbound and outbound were all hit at the same time with millions of jobs in the UK depending on it. We introduced a few schemes, e.g. furlough, and some measures specifically for tourism, e.g. cut to VAT, and other innovations like the ‘Eat Out to Help Out’ scheme; those **innovations will continue**, but we are really looking at three steps: (1) keep those jobs in travel & tourism [...] history of the sector shows it will bounce back; (2) encourage businesses to reopen, which means working with the businesses so that guidance is in place, that customers feel businesses that are open are safe; (3) make sure that when they can open they can open profitably; i.e. looking at the cost base, helping with tax and other measure, in the UK we had grants, business rate relive. [...] And we are of course still at the point where we need to see what works best, ‘steal’ ideas from overseas, trial and test; cooperate where possible”*

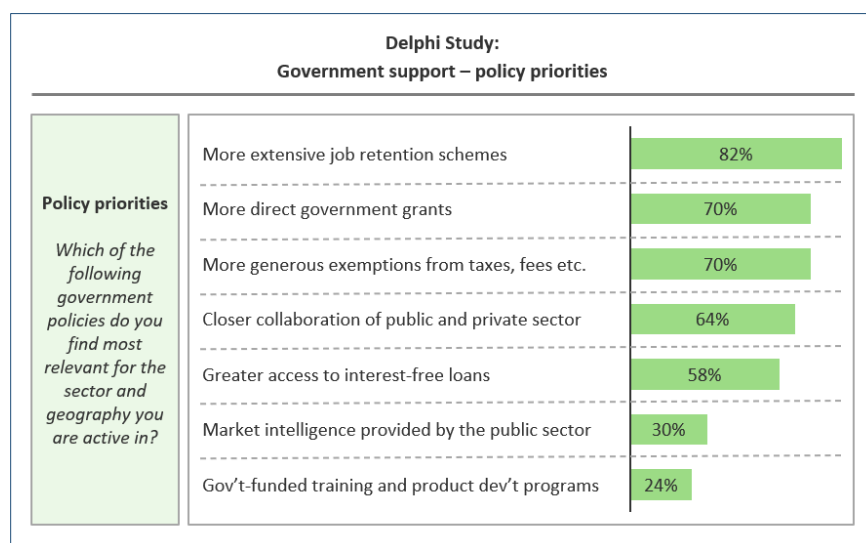
### Delphi expert views – (i) Policy priorities

Delphi study participants call for a range of (typically direct) government measure to support the travel & tourism sector. Direct financial support, specifically with regards to liquidity issues, is seen as most relevant:

- The highest priority is given to **job retention schemes**: 82% of expert see job retention schemes as a crucial policy in this crisis. The extension and further improvement of existing schemes has been highlighted as highly important.
- 70% of experts call for **more direct grants**, i.e. non-repayable funds to help weather the crisis.
- Another 70% recommend **more generous exemptions** from taxes, fees and other payments, while 58% call for **greater access to interest-free loans**.



- **Closer public-private-sector collaboration** is seen as important by 64%.
- **'Indirect' support** (market intelligence, government-funded training and product development programmes) is seen as less critical at this stage.

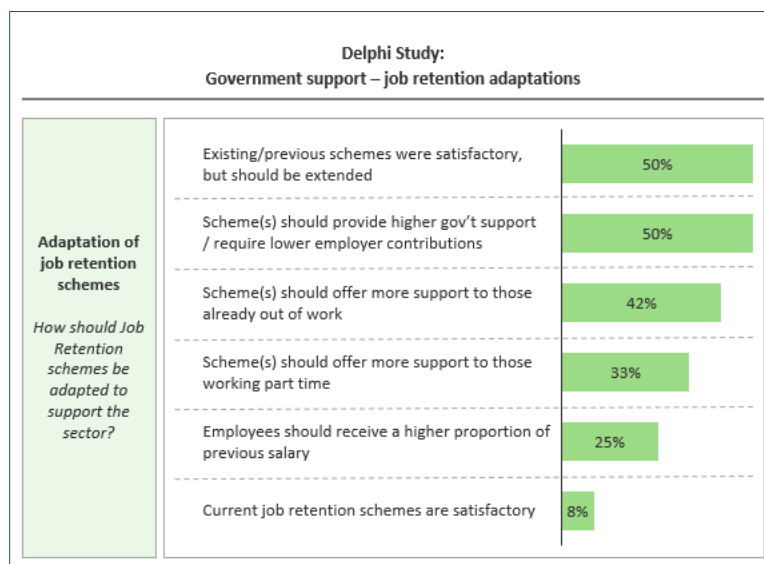


### Delphi expert views – (ii) Job retention schemes

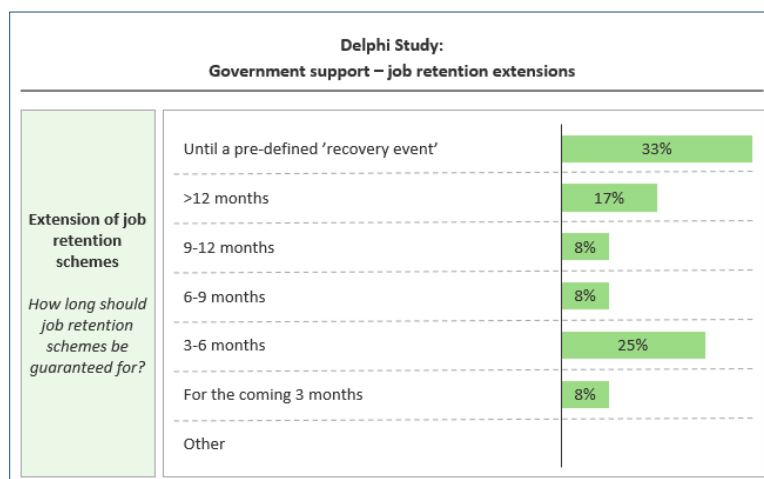
As shown above, more extensive job retention schemes are the #1 policy priority, and many experts commented on the need to **extend and improve existing schemes** (only 8% see the current schemes at fully satisfactory). Policy recommendations vary by country specifics, but there are clear messages for policy makers:

- **Ensure longer-term job retention schemes are in place; cater to specific needs of the travel & tourism sector**
  - A swift return to pre-crisis staffing levels is seen as unrealistic, and longer-term job retention schemes should be put in place. This is specifically important in countries where current job retention schemes are being rolled back, or schemes have yet to launch. Where schemes are winding down, participants warn of imminent employment losses: *"The new job scheme will not save jobs in the industry", "specific support is needed to maintain employment"; "access to interest free loans and schemes to support jobs are what SMEs in particular need to ride the storm"*
  - Experts also point out that the travel & tourism sector has so far often been unable to take full advantage of job retention schemes: *"[Job retention scheme] did not help us as much as it will have helped other industries as we as Tour Operators had tens of thousands of clients to look after and manage through the difficult situation. [We...] had to carry costs with no income coming in"; "travel agents were unable to take full advantage of the furlough scheme as they were required to keep staff employed to manage non-revenue generating activity in the processing of refunds"*
- **Increase effectiveness by providing higher government contributions**
  - Experts call for adaptations to reduce the strain on employers, ideally lowering employer contributions.

- Specific schemes to support those already out of work are also mentioned as important.



As shown above, the extension of job retention schemes is crucially important in countries where schemes are currently rolled back. Experts call for a significant extension especially in light of the second wave of COVID-19:



- 92% of participants believe that schemes should be extended for at least another 3 months.
- Majority call for an **extension for at least another half year** or until a pre-defined 'recovery event' (e.g. travel demand recovers to a certain point). More predictability is seen as crucial, especially now that the second wave is raging and travel & tourism companies struggle to make plans for the coming weeks and months: *"Extension of furlough to Dec 21 is needed", "understand why government can't guarantee for 12 months, but there should be advanced notice so businesses can plan to protect jobs", "we shall know within 6 months [whether] we will be in business or not. Cash will run out by 6 months if there is no income"; "we need a continuation of the job retention*

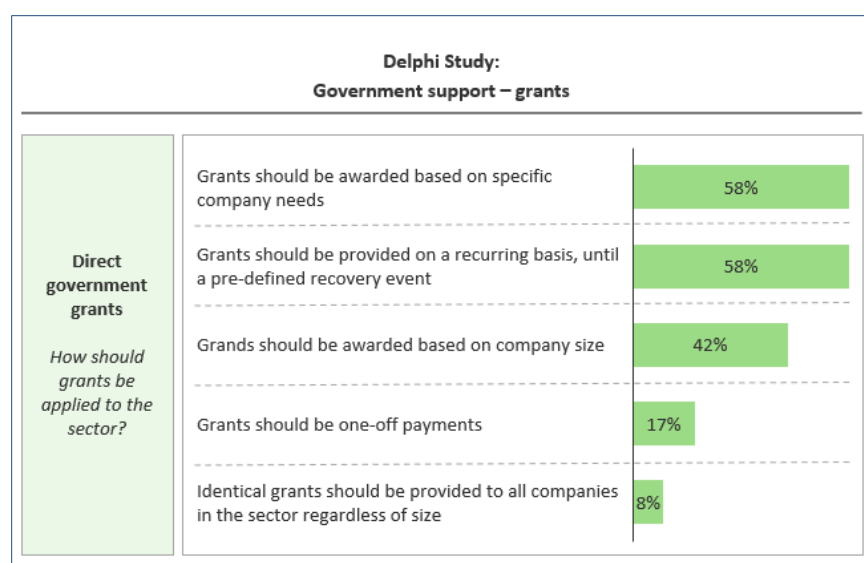


*scheme and grants”; “job retention schemes should be guaranteed until demand levels, measured by international arrivals, exceed 80% of 2019 levels”*

- Public-sector respondents typically argued against overpromising and overextending: *“While it would be ideal to guarantee job retention schemes for as long as needed, the reality is that this would not be sustainable for most governments. Already budgets are buckling under the strain of grants and incentives to support the sector. It is hoped that any respite to be gained from job retention schemes will allow for stakeholders to explore, implement innovative solutions, and pivot”*

### Delphi expert views – (iii) Direct Grants

70% of participants viewed ‘direct government grants’ as a key policy priority; *“all businesses which [can’t] survive long periods of inactivity... require support; direct grants are the most effective way to do this”, “if the Government values the industry (which they don’t) grants should be high on their agenda”*



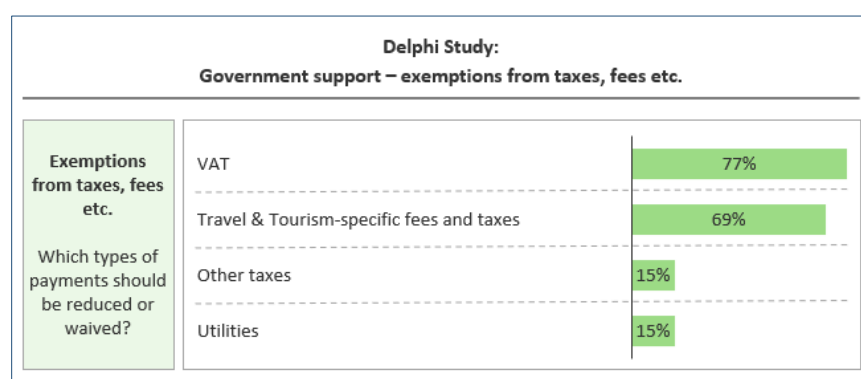
Experts participating in the Delphi study voiced the following policy suggestions:

- A targeted approach to grants is required as inactivity continues**
  - 75% of participants believed that grants should be awarded based on specific needs, and/or should be awarded based on company size: *“One size does not fit all, [and grants] need to be on an ongoing basis, especially with the pace of the virus and local lockdowns”*
- Ideally, grants should be provided on a recurring basis to support the sector:**
  - 58% of participants believe that grants should be provided until a ‘recovery event’ occurs (e.g. recovery of international demand)

### Delphi expert views – (iv) Exemptions from taxes, fees and ongoing payments

70% of participants viewed ‘more generous exemptions from taxes, fees etc.’ as a policy priority; esp. **exemptions from VAT and tourism-specific fees and taxes** are seen as beneficial.

- 77% of experts support reductions in VAT to stimulate sector demand
- 69% support exemptions from sector-specific fees and taxes. Travel & tourism companies with significant ongoing payments to the government / public sector were highlighted for specific assistance; *“continuation of rent moratoriums”; “for airports in England and Wales, they are still paying the same amount of rates on their premises as they were before the pandemic hit, which is unsustainable. This is in stark contrast to airports in Scotland and NI, and retail, hospitality sectors who have all had their business rates waived by the Government in recognition of the impact of Covid-19”*



### Delphi expert views – (v) Other policy recommendations

**Public-private collaboration** should improve, especially in light of the current crisis: *“The UK travel industry had no dialogue and certainly no direct support from the Government”; “medium and large [companies...] need better public-private cooperation”, “closer working required between government and private sector, open to all businesses, not just certain categories”.*

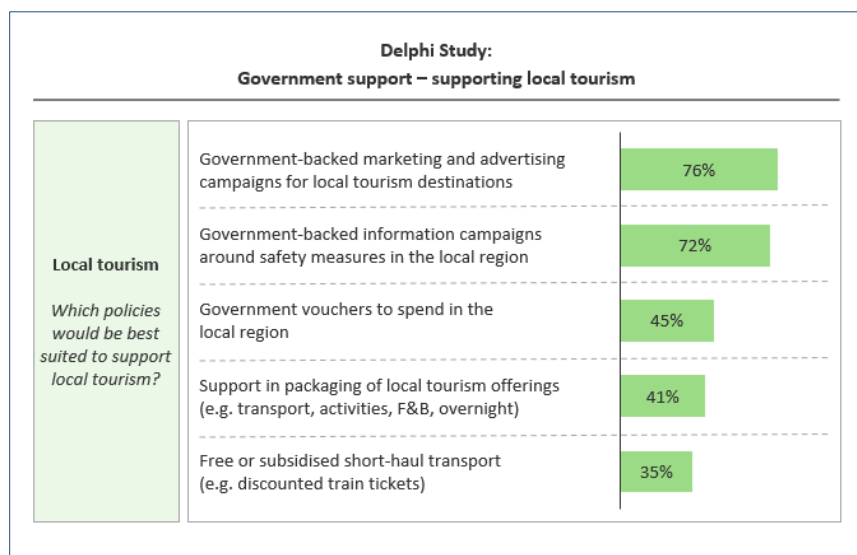
**Diversification is crucial:** Whilst just 24% of participants called for more government training and product development programs, many cited the importance of diversification; *“No one was prepared for this shock, but more diversified companies will be able to survive this crisis. I’m talking about diversification with a wide meaning – countries, markets, segments”; “small to Medium DMCs need support to help sustain their business and continue with their expansion development plans”*

### Supporting Local Tourism:

In the light of the current crisis, local tourism is seen as an important policy area. Participants typically advocate for governments to focus on promotion and information:

- **Marketing and advertising campaigns for local tourism destinations:** Governments should focus on developing “lesser-known” regions, to facilitate localised, low-density travel; *“with domestic air transport levels already close to pre-crisis levels it is a good sign that people are confident to travel either for business or leisure. However, raising awareness of regions less travelled is key to success”, “staying local is key to boost domestic demand”*

- **Information campaigns around safety measures:** Governments have a key role to play in rebuilding traveller confidence: *“It is important to generate the confidence necessary to travel. For that, communication is key, it is necessary that each country informs and publicizes the initiatives that administrations and private companies are performing to ensure the visitors’ safety. It is also key to appeal to individual responsibility for these procedures to be effective”*
- Also some support for **more tailored, local initiatives**, e.g. government vouchers to spend in the local region, support in packaging of local tourism offerings (e.g. transport, activities, F&B, overnight stays), free or subsidised short-haul transport (e.g. discounted train tickets).



### 2.3.b UNWTO and WTTC Policy Recommendations

UNWTO and WTTC emphasise the need for significant and swift government measures to support the travel & tourism sector during these turbulent times.

**UNWTO** 'Priorities for Recovery'<sup>1</sup> call for the following:

- i) Provide liquidity and protect jobs
- ii) Recover confidence through safety & security
- iii) Public-private collaboration for an efficient reopening
- iv) Open borders with responsibility
- v) Harmonise and coordinate protocols & procedures
- vi) Added value jobs through new technologies
- vii) Innovation, and sustainability as the new normal

**WTTC** specifically urges governments to implement policies that will directly support the sector across three areas<sup>2</sup>:

- i) **Protecting the livelihoods of workers:** Financial support should be granted to protect the incomes of the millions of workers in severe difficulty
- ii) **Fiscal support:** Government should extend vital, unlimited interest-free loans to global travel & tourism companies as well as the millions of small and medium-sized businesses as a stimulus to prevent them from collapse. Government dues and financial demands on the travel & tourism sector need to be waived with immediate effect for at least the next 12 months
- iii) **Injecting liquidity and cash:** Cash flow assistance to support players big and small is critical as well as to offer targeted support to severely affected industries within the sector

The following resources give an **overview** of examples to show **how governments are effectively supporting the travel & tourism sector**, leveraging ongoing research by UNWTO and WTTC:

- UNWTO: Global Tourism Dashboard – Measures to Support Travel and Tourism<sup>3</sup> is an interactive system which includes information on 159 countries and 41 institutions updated every two weeks
- UNWTO: Briefing Note 1 – How are countries supporting tourism recovery?<sup>4</sup>
- WTTC: COVID-19 Strong Policies<sup>5</sup>

*Please note that the following summary is intended to provide an introductory overview only. For more comprehensive details, please review the documents above.*

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<sup>1</sup><https://webunwto.s3.eu-west-1.amazonaws.com/s3fs-public/2020-05/UNWTO-Priorities-for-Global-Tourism-Recovery.pdf>

<sup>2</sup> <https://wttc.org/COVID-19/Government-Hub> (accessed variously in October 2020)

<sup>3</sup> <https://www.unwto.org/covid-19-measures-to-support-travel-tourism> (accessed in Oct. and early Nov. 2020) –

<sup>4</sup> <https://www.e-unwto.org/doi/epdf/10.18111/9789284421893> (June 2020)

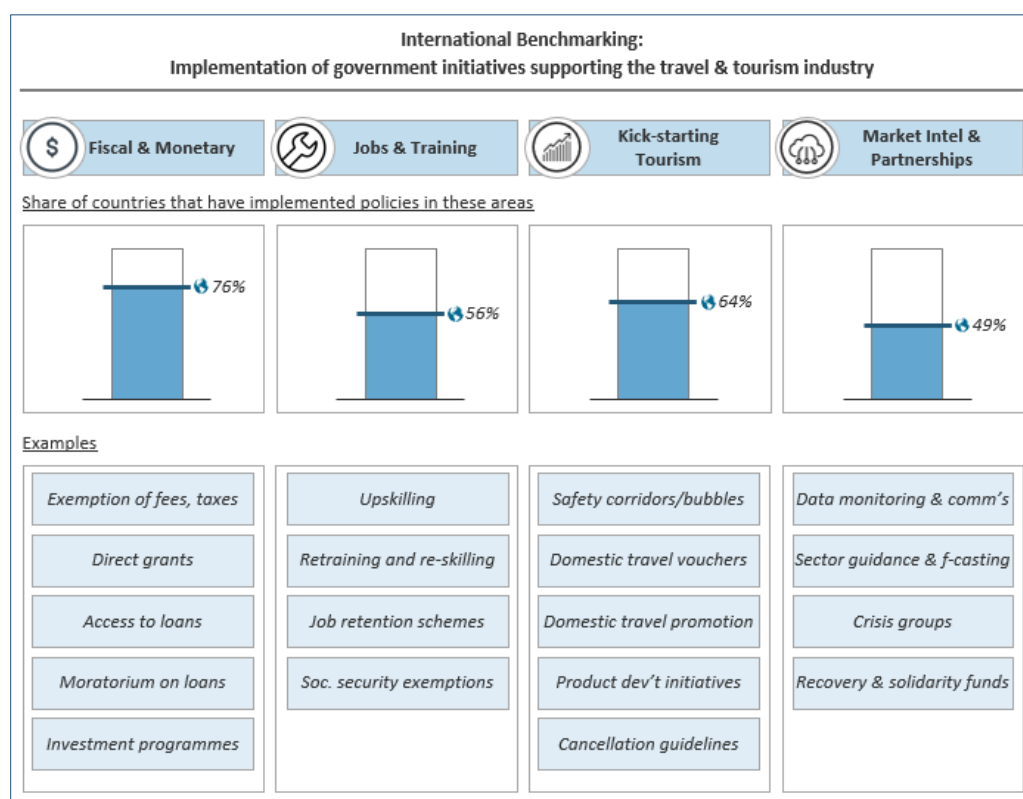
<sup>5</sup> <https://wttc.org/COVID-19/Government-Hub> (23<sup>rd</sup> October 2020)

### 2.3.c Government support – existing strong policies

Government policies supporting the sector can be split into 4 categories:

- i) Fiscal and Monetary
- ii) Jobs & Training
- iii) Kick-starting Tourism (domestic and international)
- iv) Market Intelligence and Public-Private Partnerships

The following chart provides an overview of implementation of various policies around the world (source: UNWTO's Tourism Policy Tracker):



Fiscal & monetary government support has been most widely applied across the world, with 76% of countries currently offering related programmes<sup>1</sup>, followed by 'kick-starting tourism' policies (64% of countries). Government initiatives in the 'Jobs & Trainings' and 'Market Intelligence and Partnerships' areas have only been implemented by c.50% of countries.

The following tables give detailed examples of strong policies, summarising existing information provided by UNWTO (UNWTO's Tourism Policy Tracker) and by WTTC ('COVID-19 Related Policy Shifts Supportive of Travel & Tourism Sector').

<sup>1</sup> 76% of countries had implemented either fiscal policies or monetary policies (or both), as reported on UNWTO's Tourism Policy Tracker (<https://www.unwto.org/covid-19-measures-to-support-travel-tourism>), as of 30<sup>th</sup> October 2020

Government support – existing strong policies – (i) Fiscal & Monetary<sup>1</sup>

1. Fiscal & Monetary		
	<i>Policy Details</i>	<i>Policy Examples</i>
a. Exemption of fees, taxes	<ul style="list-style-type: none"> <li>Exemption or reduction of general taxes (e.g. VAT, income, property tax)</li> <li>Tourism-specific fees and taxes (e.g. tourism marketing tax, aviation and passenger fees, city tourism taxes)</li> <li>Utilities and gov't rents (e.g. rents for airport ground lease, private businesses in state-run national sites)</li> </ul>	<ul style="list-style-type: none"> <li><b>Colombia:</b> VAT reduced to 5% on all air tickets</li> <li><b>Egypt:</b> postponed all tourism and hotel dues, and provided rent exemptions to all bazaars/cafes based located within archaeological sites</li> <li><b>Guinea:</b> tourism and hotel businesses exempt from utility bills, apprenticeship taxes and certain import duties, reduced health/life insurance taxes</li> </ul>
b. Direct grants	<ul style="list-style-type: none"> <li>Obligation-free government grants to some of the worst-impacted companies in the sector – e.g. airlines, SMEs and self-employed workers, travel agencies</li> <li>Many international institutions (e.g. IMF, World Bank, EU Commission) have supported countries through grants (as well as loans and other special lines of credit)</li> </ul>	<ul style="list-style-type: none"> <li><b>Australia:</b> Tourism recovery fund in WA `provided one-off grants of \$6.5k to up to 1.6k SMEs; national government have granted AUD 165m to Qantas/ Virgin Australia to maintain a limited domestic flight network</li> <li><b>Hong Kong:</b> Cash subsidies provided to travel agents (HK\$20k-200k), travel agent staff and freelance tourist guides / tour escorts (\$30k), hotels (\$300-400k), tourist coach drivers (\$10k)</li> <li><b>USA:</b> Relief grants provided to the aviation sector, including \$25bn for passenger airlines, \$10bn for airports</li> </ul>
c. Access to loans	<ul style="list-style-type: none"> <li>Provision of interest-free, or low-interest, loans to assist the cash-flow of companies affected by the crisis; companies are typically eligible for loans proportional to the company size</li> <li>Some leading countries, e.g. Japan, have provided large companies with unlimited access to credit</li> <li>Gov't's may guarantee a certain share of loans to encourage lending</li> </ul>	<ul style="list-style-type: none"> <li><b>Brazil:</b> BNDES have opened a working capital loan line for tourism and service sector SMEs, under preferential conditions</li> <li><b>China:</b> RMB100bn in credit has been earmarked for loans to affected cultural &amp; tourism enterprises, aimed at assisting small/medium/micro-culture and tourism enterprises</li> <li><b>Japan:</b> large businesses, e.g. airlines, can access low-interest loans with no upper-limit; SMEs may access loans up to c.USD \$2.8m, with an interest subsidy program in place for those experiencing &gt;20% in revenue whilst using the scheme</li> </ul>
d. Moratorium on loans	<ul style="list-style-type: none"> <li>Interest payments may be postponed, for a fixed time period or when certain conditions are met (e.g. revenue decline)</li> <li>Some gov't's and banks applied this to loans made pre-COVID, as well as loans provided during the COVID crisis</li> </ul>	<ul style="list-style-type: none"> <li><b>Austria:</b> tourism enterprises with active loans prior to COVID outbreak can apply for the suspension of all loan repayments for the year 2020</li> <li><b>France:</b> French banks have committed to postponing the reimbursement of corporate loans for up to six months, free-of-charge Georgia: government will pay interest on loans for SME hotels (4-50 rooms)</li> </ul>
e. Investment programmes	<ul style="list-style-type: none"> <li>Governments may provide direct investment programmes/funds, or incentives for private investment</li> <li>Aimed at improving existing T&amp;T companies/infrastructure, or enabling local T&amp;T players to reposition to meet changing demand</li> </ul>	<ul style="list-style-type: none"> <li><b>Australia:</b> Government have announced AUD 233m of investment in tourism and infrastructure, incl. upgrades to four national parks (e.g. better facilities, staff housing, water stations and walking tracks)</li> <li><b>Fiji:</b> new 'Hotel Investment Incentive Package' offers tax exemptions equal to 25% of capital expenditure on hotel construction, renovation etc. 2</li> <li><b>Morocco:</b> 'Fund for Strategic Investment' will assist firms that require equity investments to develop their business, and finance investment projects (incl. public-private partnerships)</li> </ul>

<sup>1</sup> Examples based on UNWTO and WTTC information (UNWTO's Tourism Policy Tracker) and by WTTC ('COVID-19 Related Policy Shifts Supportive of Travel & Tourism Sector')

<sup>2</sup> Investment Fiji: <https://www.investmentfiji.org.fj/pages.cfm/for-investors/sector-industry-profiles/tourism.html?printerfriendly=true#> (accessed variously in October 2020)

Government support – existing strong policies – (ii) Jobs & Training<sup>1</sup>

2. Jobs & Training		
	<i>Policy Details</i>	<i>Policy Examples</i>
a. Travel and tourism upskilling	<ul style="list-style-type: none"> <li>Online training programmes, designed to 'upskill' workers in the sector: e.g. developing new business models, digital transformation, marketing of domestic destinations, sustainable tourism, or pandemic readiness</li> <li>Some programs are incentivised; e.g. Cambodian workers must attend a course before receiving wage subsidies; other governments incentivise independent training provision</li> </ul>	<ul style="list-style-type: none"> <li><b>Chile</b> are adapting their 'technical assistance program' to incorporate a strong digital component for businesses, incl. digital management processes for tourism entrepreneurs</li> <li><b>Portugal</b>: launched an 'Online Certified Executive Training Program', with workshops/webinars covering e.g. marketing, hygiene and food safety, new business models</li> <li><b>Singapore</b> have set up a 'Training Industry Professionals in Tourism' fund, which contributes up to 90% of fees for training courses/trainers, up from a previous cap of 50%</li> </ul>
b. Re-training and re-skilling	<ul style="list-style-type: none"> <li>Programs to re-train employees laid off as a result of the crisis, aiming to align workforce supply to economic needs</li> <li>These can form part of economy-wide retraining programs (e.g. UK, Russia), or specific initiatives for travel sectors</li> <li>Private-sector companies have also engaged in temporary 'self-reallocation' of employees – e.g. Scandinavian Airlines and Easyjet, among others, retrained qualified staff to assist healthcare providers</li> </ul>	<ul style="list-style-type: none"> <li><b>Australia</b>: Airline Industry Retraining program to fast-track employees into the tech sector; particularly data and cybersecurity roles<sup>2</sup></li> <li><b>Cambodia</b>: retraining programs to laid-off workers, with the Ministry of Labour and Vocation Training allocating &gt;USD 60m to programs and support<sup>3</sup></li> <li><b>Hong Kong</b> have injected an additional HK 2.5bn in their Employees Retraining Board, offering a retraining allowance of HK 5.8k to eligible trainees</li> </ul>
c. Job retention schemes	<ul style="list-style-type: none"> <li>Wage subsidy schemes, and an easing of conditions for temporary lay-offs, helping employers to adapt to crisis demand while supporting and retaining employees</li> <li>Some schemes only assist employees who are unable to work (either full 'furlough', or reimbursement for hours not worked); others are paid regardless of employee hours worked (typically on the condition that the employer has suffered a certain revenue reduction)</li> <li>Provisions also offered to self-employed workers and apprentices</li> </ul>	<ul style="list-style-type: none"> <li><b>Australia</b>: employees in companies with &gt;30% reduction in turnover (50% for large companies) receive AUD \$1.5k per month, regardless of hours worked; similar for sole traders</li> <li><b>France</b>: employees can claim 70% of gross salary on all hours they are unable to work, up to a maximum of €6.9k/month; self-employed can receive a maximum of €1.5k/month</li> <li><b>UK</b>: the government pays up to 80% of salary for temporarily furloughed employees, up to max £2.5k/month; to be replaced by a 'part-time' scheme, where govt. contributes 1/3 of salary for hours not worked</li> </ul>
d. Social security and insurance contribution exemptions	<ul style="list-style-type: none"> <li>Govt. support employers by covering (or contributing to) various 'additional' costs of employment</li> <li>These include employee payments for social security, pension and various insurance premiums (medical, work-related injury etc.)</li> </ul>	<ul style="list-style-type: none"> <li><b>China</b> have reduced social insurance premiums, pension, unemployment, work-related injury insurance contributions, medical insurance premiums, and the cost of employment procedures</li> <li><b>Greece</b> has covered all social insurance and health contributions for temporarily suspended workers</li> <li><b>Hungary</b> cancelled the contribution of employer payment liabilities in their entirety</li> </ul>

<sup>1</sup> Examples based on UNWTO and WTTC information (UNWTO's Tourism Policy Tracker) and by WTTC ('COVID-19 Related Policy Shifts Supportive of Travel & Tourism Sector')

<sup>2</sup> Airline Industry Retraining Scholarship Program: <https://www.institutedata.com/courses/air-scholarship-program/> (accessed variously in October 2020)

<sup>3</sup> BetterWork Cambodia: <https://betterwork.org/2020/04/15/cambodia/> (accessed variously in October 2020)



Government support – existing strong policies – (ii) Kick-starting Tourism<sup>1</sup>

3. Kick-starting Tourism		
	<i>Policy Details</i>	<i>Policy Examples</i>
a. Safety corridors and bubbles	<ul style="list-style-type: none"> <li>• Safety corridors are intended to permit 'restriction-light' travel between destinations with low COVID-risk</li> <li>• May only target a specific type of travel – e.g. business, or official/diplomatic</li> <li>• Vital intermediary step to kick-start travel, prior to a vaccine and evidence-based, globally-aligned travel restrictions</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Australia/NZ:</b> One-way travel bubble introduced from Oct. 16th, arrivals from NZ do not have to quarantine in AUS</li> <li>• <b>Indonesia/UAE:</b> corridor facilitates official/diplomatic trips; travellers exempt from quarantine if strict health protocols are adhered to 2</li> <li>• <b>Lithuania, Latvia and Estonia</b> formed a 'Baltic Travel Bubble' from May 15th, whereby citizens are free to travel within the regions</li> </ul>
b. Vouchers for domestic travel	<ul style="list-style-type: none"> <li>• Typically labelled as 'vouchers' or 'bonuses', certain travellers can spend these towards certain tourism purchases</li> <li>• Some targeted by demographic (e.g. 18+, families with children, low-income groups)</li> <li>• Some subsidise specific spend (e.g. hotel stays, tours, 'hospitality facilities', ferry travel)</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Greece:</b> c.1m hotel nights subsidised for low-income groups, with gov't covering 50% of a 4-night stay in a hotel</li> <li>• <b>Iceland:</b> c.0.3m residents will receive vouchers worth ISD 5k, redeemable with domestic tourism companies that have signed up for the 'Travel Gift' scheme</li> <li>• <b>Thailand:</b> c.5m hotel nights subsidised for nationals travelling out-of-province, with gov't covering up to 40% of a 5-night stay in a hotel. This is similarly applicable to other tourism services, e.g. food and domestic air tickets.</li> </ul>
c. Domestic travel marketing and promotion	<ul style="list-style-type: none"> <li>• Governments aiming to kick-start domestic tourism via national advertising and communication campaigns</li> <li>• Typically combining government-led content (videos, 'top lists', digital platforms) and messaging ('Love our Locals', 'Travel for Georgia') with traveller-led contests (e.g. destination ideas, photos) and content (e.g. testimonials, experiences)</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Argentina:</b> 'Promote your Destination' contest launched, encouraging tourism students and recent graduates to generate innovative ideas on how to promote the countries' destinations</li> <li>• <b>Denmark:</b> travellers encouraged to use #baredenmark (Just Denmark) to highlight their vacation experiences in Denmark, with top Instagram posts eligible to win USD 32k</li> <li>• <b>New Zealand:</b> 'Do Something New, New Zealand' campaign aims to market and promote domestic travel, with specific focus on the regions most impacted by the restrictions on the China visitor market.</li> </ul>
d. Product development initiatives	<ul style="list-style-type: none"> <li>• Sector products must evolve to changes in demand. Safer, 'off-the-beaten-path' destinations will see a resurgence as travellers look to avoid crowds</li> <li>• Development should pivot towards outdoor, adventure, nature and rural products</li> <li>• Whilst new products are typically pivoted to the domestic market, product development will also be crucial to restarting international travel</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Costa Rica</b> aim to build on their internationally-acclaimed wellness segment by developing products that mix wellness and adventure with unique experiences</li> <li>• <b>Mexico:</b> promoting rural destinations and road-trip routes by ramping up its '121 Magical Towns' and 'Maya Train' projects, integrating tourism circuits that cover beaches, Magical Towns and cities declared World Heritage Sites</li> <li>• <b>Paraguay</b> is highlighting their natural (birdwatching, fishing) and (eco)adventure, rural, cultural and gastronomy tourism products, via 'virtual trips' covering 22 domestic routes/itineraries</li> </ul>
e. Cancellation guidelines and procedures	<ul style="list-style-type: none"> <li>• Provision of clear, traveller-protecting guidelines and procedures in the event of travel cancellations to build confidence</li> <li>• Promotion of voucher provision for cancelled trips and packages (preferred to reimbursement)</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Czech Republic:</b> both customers and tour operators can legally withdraw from contracts without cancellation fee</li> <li>• <b>Japan:</b> following a spike in COVID cases, the govt. announced it would compensate local travel agents/hotels for losses caused by cancellations</li> <li>• <b>Lithuania:</b> travel guarantee fund to compensate tourists for losses incurred due to insolvency of tour operators, in the event of insufficient insurance/guarantees</li> </ul>

<sup>1</sup> Examples based on UNWTO and WTTC information (UNWTO's Tourism Policy Tracker) and by WTTC ('COVID-19 Related Policy Shifts Supportive of Travel & Tourism Sector')

<sup>2</sup> ASEAN Briefing: <https://www.aseanbriefing.com/news/indonesia-uae-establish-travel-corridor-salient-features/> (accessed variously in October 2020)



## Government support – existing strong policies – (iv) Market Intelligence & Public-Private Partnerships<sup>1</sup>

4. Market Intelligence & Public-Private Partnerships		
	<u>Policy Details</u>	<u>Policy Examples</u>
a. Data monitoring and communication	<ul style="list-style-type: none"> <li>Many governments have developed new data-gathering initiatives in response to COVID, and made the results accessible via digital platforms/portals</li> <li>Typically covers demand statistics (e.g. bookings data) and survey-led data quantifying the crisis impact</li> </ul>	<ul style="list-style-type: none"> <li><b>Belgium:</b> Walloon Tourism Observatory conducts a weekly survey among tourist accommodation establishment to measure the impact of COVID-19</li> <li><b>Mexico:</b> To inform domestic marketing campaigns, Mexico has adopted a digital strategy based on big data and social listening to ensure the right content reaches the right audience</li> <li><b>New Zealand</b> capture and publish regular data regarding crisis impact (e.g. Tourism Data Factsheets: COVID-19 Response); private data has also been purchased to provide more timely information</li> </ul>
b. Sector guidance and forecasting	<ul style="list-style-type: none"> <li>As part of close communication between public and private sectors, many governments have facilitated information sharing via online portals; provide guidance to tourism businesses, travellers and workers; regarding e.g. latest news and recommendations, 'best-practice' business or hygiene models, or training initiatives</li> <li>In addition, some governments have produced demand forecasts and impact assessments</li> </ul>	<ul style="list-style-type: none"> <li><b>China</b> have conducted market intelligence to forecast domestic tourism demand, and inform the scale of tourism re-opening by province</li> <li><b>Colombia</b> implemented a communication channel with Latin American tourism authorities and tourism organizations worldwide to share information on good practices</li> <li><b>Germany</b> have set up the 'Corona-Navigator' website, which provides guidance to tourism stakeholders via latest news, facts and recommendations</li> <li><b>Peru:</b> <a href="http://www.turismoin.pe">www.turismoin.pe</a> offers trend reports and studies (e.g. 'the Peruvian traveller post-quarantine'), offering advice and other strategic information to tourism entrepreneurs</li> </ul>
c. Crisis groups consulting with the private sector	<ul style="list-style-type: none"> <li>In response to the crisis, many governments have set up groups, committees or task forces</li> <li>Aiming to consult regularly with representatives of key tourism stakeholders, to ensure that the private sector can share policy-informing insight and stay informed on protocols and recommendations</li> </ul>	<ul style="list-style-type: none"> <li><b>Austria's</b> T&amp;T ministries are in close exchange with the industry and relevant stakeholders (social partners, industry associations, etc.) to discuss the current situation and further steps</li> <li><b>Korea</b> has conducted regular Public-Private Tourism Stakeholder Virtual Meetings to evaluate and mitigate the crisis</li> <li><b>Singapore</b> created a Tourism Recovery Action Task Force, representing government ministries and agencies as well as travel agencies, tourist guides, airlines, hotels and accommodation</li> </ul>
d. Recovery and solidarity funds	<ul style="list-style-type: none"> <li>Funds for recovery projects, to which both public and private-sector companies are encouraged to contribute</li> <li>Often not sector-specific, usually a specific goal – e.g. SME-assistance or public health provision</li> </ul>	<ul style="list-style-type: none"> <li><b>France</b> invested €2bn in a solidarity fund for small businesses impacted by the crisis; this has seen donations from private companies incl. insurers</li> <li><b>South Africa</b> created a solidarity fund, with ZAR 0.15bn of government 'seed' funding complemented by donations from businesses, individuals and int'l community; fund now exceeds ZAR 3bn</li> </ul>

<sup>1</sup> Examples based on UNWTO and WTTC information (UNWTO's Tourism Policy Tracker) and by WTTC ('COVID-19 Related Policy Shifts Supportive of Travel & Tourism Sector')



## 2.4 A Smarter, Seamless Travel Experience

Smart travel technology and seamless travel experiences are widely seen as potential drivers for the travel & tourism sector to **accelerate recovery from the current crisis** (e.g. touchless and public health solutions). However, these are also **longer-term initiatives** that will shape the industry in the coming years, significantly improving the traveller experience.

This chapter summarises the results of the Delphi study, existing UNWTO and WTTC recommendations, with a specific deep-dive into the 'Safe and Seamless Traveller Journey' (based on WTTC reports).

### Results in a nutshell

**Delphi participants** give a clear mandate for the industry-wide push towards smarter tech and seamless travel. Several areas are highlighted as of high interest:

- **Data analytics and personalisation** (#1 priority)
- Biometrics and digital identities; **seamless traveller journey** (#2)
- Virtual assistants and virtual travel experiences (#3)

While data analytics is the #1 priority, many participants struggle with implementation, esp. due to difficulties in linking and managing existing data, and in capturing more/better customer data. The seamless traveller journey is seen as a crucial step in overcoming pandemic-related issues, requiring strong, industry-wide action to succeed, given cost implications for individual companies.

Overall, the implementation of new technology is **often held back** by the lack of clearly visible **ROI**, and the '**survival mode**' many companies find themselves in due to the COVID-19 crisis.

Given the economic impact of COVID-19 and (sometimes) perceived lack of concrete ROI on existing solutions, government assistance is required to foster innovation. **Experts suggest several policies:**

- Improved public sector incentives for implementing specific technologies
- Other public sector involvement – e.g. via cooperative or sponsored research projects, tailored around a specific ambition
- Better information on benefits and best practices

**UNWTO and WTTC** have both published a number of initiatives to support the sector in innovating towards smarter technology, particularly in response to the current crisis, e.g.:

- WTTC: 'Safe and Seamless Traveller Journey' initiative
- UNWTO: Healing solutions for tourism challenge; identifying 9 top solutions, out of 1183 applications, driving tourism-responses to COVID-19. These 9 solutions focus on 'people', 'prosperity' and 'destinations', and are being connected with UNWTO Member States and partner corporations to advance and implement their projects.

Both organisations provide ample examples of applying innovative technology in the travel & tourism sector, and we encourage the reader to engage with their content in more detail.

## 2.4.a Delphi Study and Ministers' Summit Contributions

Ministers' Summit participants have shared insights into the **use of smart technology**, with several concrete examples discussed:

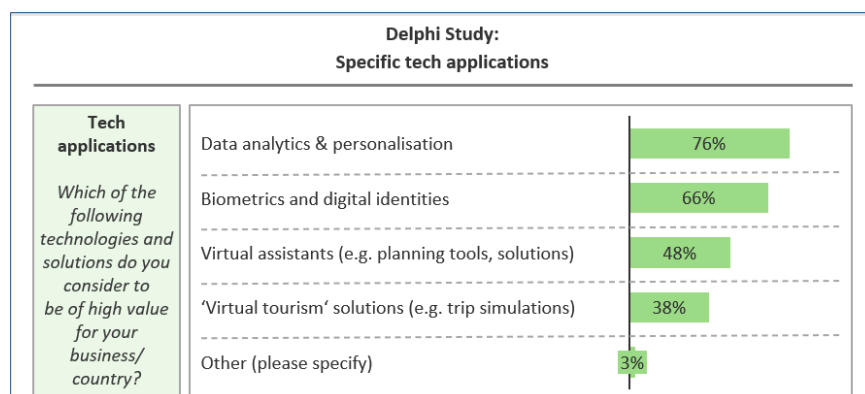
- Harry Theoharis, Minister of Tourism, Greek National Tourism Organisation: *"One thing we initiated during the crisis was the **machine learning and artificial intelligence** system that we installed at the borders with the passenger locator form which was only online and which allowed us to increase the effectiveness of our testing by up to 4 times, 2.5 times on average; this gave us an advanced warning of the situation other countries were going through, up to two weeks before it appeared in the headlines"*
- Hon. Nayef Al-Fayez, Minister of Tourism and Antiquities, Jordan: *"We have started to use technology to create **digital copies of cultural heritage sites** to give access even during this crisis. It really serves two purposes (1) getting people to Jordan without being physically here, (2) getting them excited to come as soon as they can. This initiative has shown a lot of success and we are trying to include more sites"*
- John Holland-Kaye, CEO, Heathrow: *"The COVID-19 crisis is going to accelerate the trend we have been seeing for some time, towards a **contactless travel experience**; we had already started developing the airport of the future, where you use your face increasingly as a passport when you travel through an airport. [...] We have also adapted our equipment more quickly, you can scan a QR code on your phone and you can go through the check-in process on your phone instead of touching a check-in kiosk. [...] But we are also investing in other technologies – e.g. **self-cleaning** handrails, using ultraviolet light. Similar technology is used on lift buttons. A lot of innovation is happening around the whole hygiene environment as well as the passenger journey and security. [...] We will also move towards the **next generation of security scanners** which will allow you to keep your bags and computers and liquids all together, so it will be a much better airport experience, while keeping you even more secure than you are today. [...] The pandemic means there is less money available to make that change happen, but there's more pull from passengers, and that's why are looking at clever ways for adapting the technology we currently have to a contactless world."*

**Participants of the Delphi study** generally expect a move towards 'Smart Travel' solutions. This section summarises their views on

- i) Key technology applications of interest
- ii) More detailed views on data analytics and personalisation...
- iii) ...and biometrics and digital identities; 'seamless traveller journey'
- iv) Challenges to adoption of smarter tech
- v) Suggested policies to foster innovation and investment

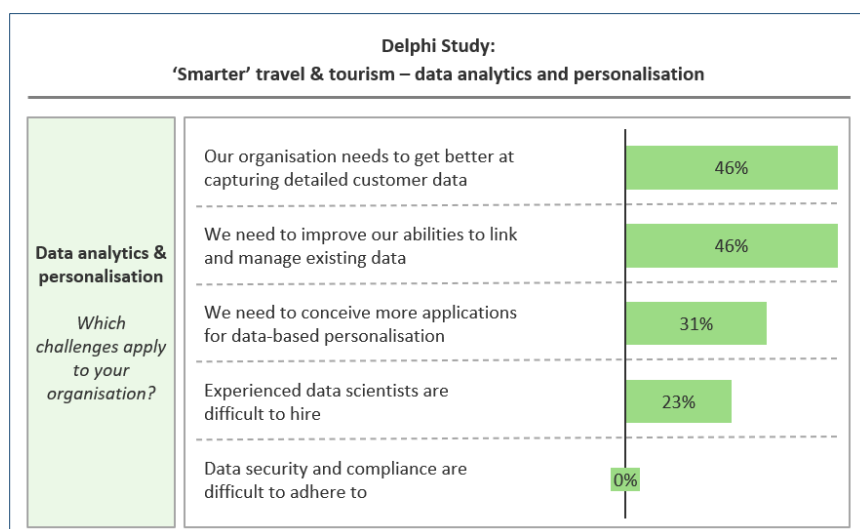
### Delphi expert views – (i) Key Technology Applications

Key tech applications of relevance are **data analytics and personalisation, biometrics and digital identities**, and **virtual solutions** (e.g. virtual assistants, 'virtual tourism' solutions).



### Delphi expert views – (ii) Data analytics & personalisation

76% of participants view data analytics and personalisation as a key policy priority; *“technology should be the facilitator of a long-lasting tourism experience. Personalization is key”*. Enhanced personalisation is currently largely limited by ‘internal’ capturing and processing capabilities.



Despite the importance of the area, a majority of participants report to face challenges in transitioning to stronger usage of data analytics and personalisation. Key improvement points mentioned by experts are (#1) better capture of customer data and (#2) improved capabilities to link and manage existing data. Many experts would also like to see more concrete applications for data-based personalisation.

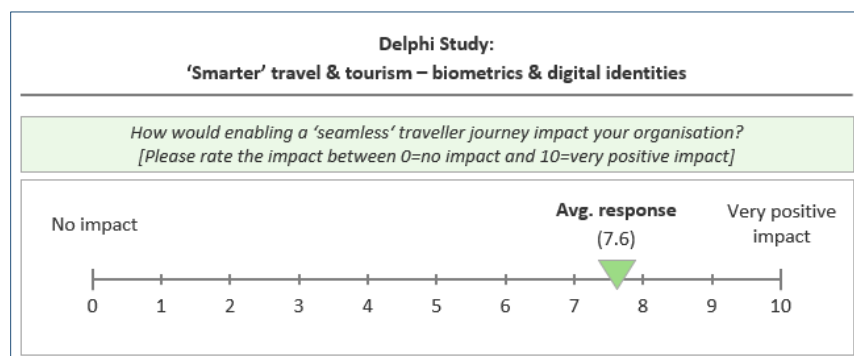
### Delphi expert views – (iii) Biometrics and digital identities; ‘seamless traveller journey’

66% of participants view biometrics and digital identities as a key policy priority. Implementing a **‘seamless’ traveller journey** would have a **clear, positive impact**, especially in the current pandemic:

- c.70% of participants assess the potential impact on their organisation as high (between 8 and 10 on a 0-10 range; average rating given at 7.6): *“If international concern and regulations around coronavirus continue then biometrics are likely to become essential and crucial in travel systems”; “prior to the pandemic, we have also advocated for a safe and seamless experience for the visitor. In this present crisis, efforts to return to that level of facilitation and flow, as much as responsibly*

*practical, will assist immensely”; “we already offer some parts of a seamless passenger journey but a full journey would improve on-airport efficiencies, as well as the passenger's experience at the airport (and their preferences for future visits)”*

- Those with a less positive assessment generally see value of a seamless journey, but foresee difficulties in achieving this: *“This Technology is too expensive currently”, “we are not a large organisation and our itineraries are too complex”*

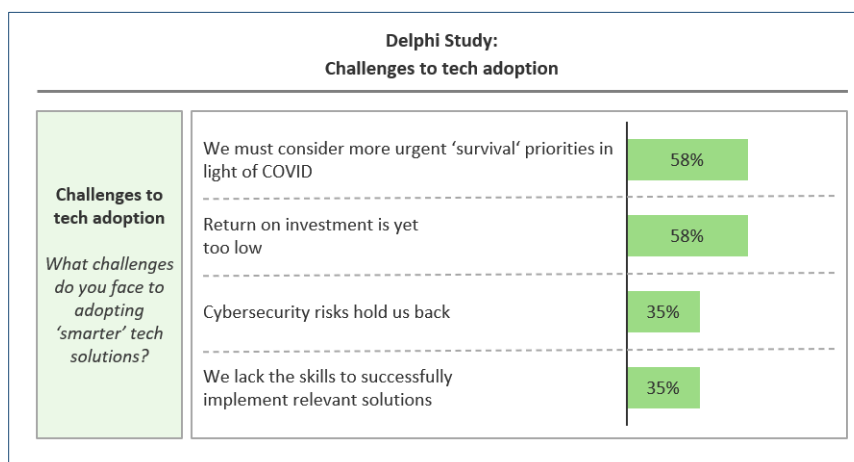


#### Delphi expert views – (iv) Challenges to adoption of smarter tech

Participants of the Delphi study report two key issues currently slowing down or holding back investment in smart technology:

- **Low ROI (58%):** Return on investment for many applications is yet seen as too low, or not yet proven.
- In the light of **COVID-19**, more important **‘survival’ initiatives** need to be prioritised (58%); *‘Covid will put any projects for investment or innovation on the back burner for the foreseeable future’*

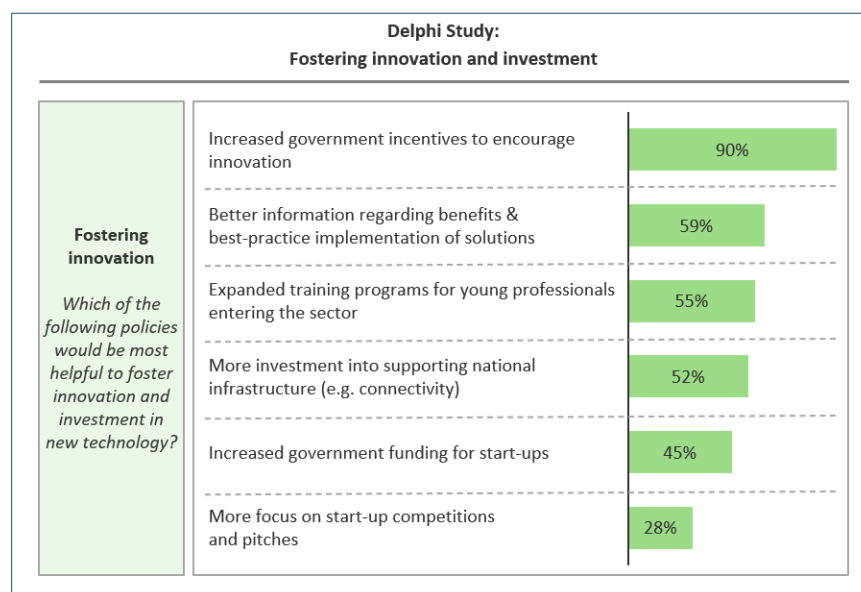
C. 1/3 of experts also mentioned **cybersecurity risks** and **skill gaps**. Some struggle with the specifics of successful implementation; *‘digitising our processes has accelerated during the pandemic. We continue to bet on this and it’s true that big brakes are coming from cybersecurity and ... managing the pandemic’*



### Delphi expert views – (v) Suggested policies to foster innovation and investment

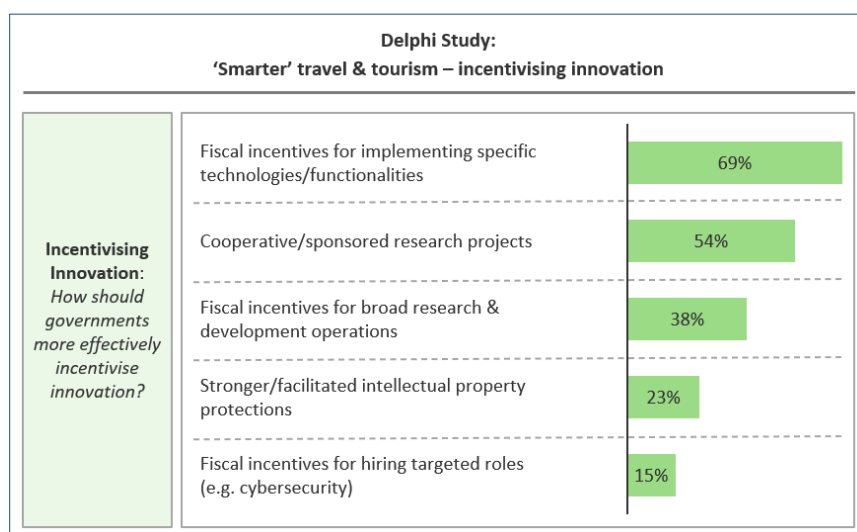
Participating experts agree on the more prominent role of smarter technology in the coming years. However, due to the perceived uncertainty about ROI and based on the current COVID-19 crisis, most experts would welcome the **public sector to take a leading role** and support the transition towards a smarter travel & tourism sector. The following policies were seen as most helpful:

- Direct government incentivisation to encourage innovation is a prioritised option
- However, better information sharing regarding benefits and best practices and expanded training programs are also seen as highly beneficial
- Start-up funding and supporting competitions / pitches could complete a broad set of policies



In terms of **direct government incentives**, experts would like to see **encouragement of specific innovations**:

- 69% of participants advocate for fiscal incentives for implementing specific technologies and functionalities; 54% favour governments launching cooperative/sponsored research projects, tailored around a specific ambition
- Incentives for “broader” innovation were typically seen as less critical – e.g. R&D operations, IP protections, role-hiring





## 2.4.b UNWTO and WTTC Recommendations

UNWTO and WTTC have both published a number of initiatives to support the sector in innovating towards smarter technology, particularly in response to the current crisis, including:

- WTTC: 'Safe and Seamless Traveller Journey' (SSTJ) initiative<sup>1</sup>
- UNWTO: Healing solutions for tourism challenge<sup>2</sup>; identified 9 start-up finalists who are driving solutions to mitigate COVID-19's impact on tourism
- UNWTO: Leveraging A.I. to link tourism workers with jobs, in partnership with Eighfold.ai<sup>3</sup>




This chapter focuses on WTTC's 'Safe and Seamless Traveller Journey' initiative, particularly with regards to models leveraging 'digital identities' to create a seamless traveller experience. The chapter briefly summarises the potential benefits, ongoing research, open questions and next-steps.

### WTTC's 'Safe and Seamless Traveller Journey' Initiative

*Please note that the following is intended only an introductory summary of the SSTJ – for further details, please see individual reports cited below<sup>1</sup>*

A 'Safe and Seamless Traveller Journey' (SSTJ) is one in which travellers will no longer have to repeatedly present travel documents, boarding passes, booking confirmations and health certifications to multiple stakeholders at different stages of their journey. Instead they will be able to book transportation, check-in, proceed through security, cross borders, board aircraft, collect baggage, rent a car, check in and out of hotels, and access myriad destination services, simply by confirming their identity and booking data.

Digitising, securing and successfully deploying this traveller data (biometric, biographic, health and travel) offers benefits that must be harnessed throughout the travel ecosystem:

 <b>Public Sector</b>	 <b>Private Sector</b>	 <b>Travellers</b>
<ul style="list-style-type: none"> <li>✓ Increased health control mechanisms</li> <li>✓ Increased border security, whilst reducing bias</li> <li>✓ Increased border crossing capacity</li> <li>✓ Reduced resource requirements (e.g. personnel)</li> </ul>	<ul style="list-style-type: none"> <li>✓ Enhance/personalise the customer experience</li> <li>✓ Increased security, whilst reducing data liability</li> <li>✓ Increased asset utilisation, reduced strain on infrastructure.</li> <li>✓ Facilitate offering a safer, touchless experience</li> </ul>	<ul style="list-style-type: none"> <li>✓ Enhanced/personalised customer experience</li> <li>✓ Removal of points of friction</li> <li>✓ Increased security and transparency of data usage</li> <li>✓ Increased health controls and reduced infection risk</li> </ul>

<sup>1</sup> <https://wtcc.org/Initiatives/Security-Travel-Facilitation>: various reports are available for download. Sources used for the creation of this chapter are: Discussion Paper Data Facilitation: Privacy Perspective August Update (18<sup>th</sup> August 2020), Guidelines for WTTC's Safe & Seamless Traveller Journey – Testing, Tracing and Health Certificates, Discussion Paper Data Facilitation for the Seamless Traveller Journey (16<sup>th</sup> January 2020), Emerging Models Overview Findings Report (20<sup>th</sup> November 2019), Situation Report (14<sup>th</sup> June 2019)

<sup>2</sup> <https://www.unwto.org/healing-solutions-tourism-challenge> (accessed variously in October 2020)

<sup>3</sup> <https://www.unwto.org/news/unwto-to-harness-the-power-of-ai-to-link-tourism-workers-with-jobs> (1<sup>st</sup> October 2020)

In achieving this goal, the sector must overcome 2 key challenges:

**(i) Develop an interoperable and cooperative approach**

- Align existing initiatives and technologies, ensuring the development of interoperable and scalable solutions - between governments, public/private sectors
- Agree and cooperate on key standards and approaches

**(ii) Ensure data privacy, control and trust**




- Methods of collecting and storing traveller data, and for how long; provide clarity on who owns data, and the right to share data
- Ensure travellers own and control their digital information, enabling them to present only operationally-required data to travel providers
- Ensuring stakeholders adhere to data privacy standards

**Safe and Seamless Traveller Journey – (i) Develop an interoperable and cooperative approach**

Three core models have emerged to address the end-to-end journey: (a) a government-led approach, (b) a 'per trip'-based approach, (c) a 'per life'-based approach.

	GOVERNMENT	PER TRIP	PER LIFE
ABOUT	Government collects, stores and verifies biometric data on an ongoing basis	Traveller creates a single journey token in advance of each trip	Travellers enrol once to create a digital identity
ATTRIBUTES	<ul style="list-style-type: none"> <li>• No traveller enrolment; government acts as identity management service provider</li> <li>• Govt. provides 'Identity as a Service' (IDaaS) platform for travel providers</li> <li>• Only facial and finger biometrics used</li> <li>• Biometrics stored indefinitely</li> </ul>	<ul style="list-style-type: none"> <li>• Traveller enrolls prior to travel, by creating a single journey token via mobile or in-person</li> <li>• Orchestration platform (trusted third-party) houses and maintains the 'token'</li> <li>• Token contains key biographic and biometric (facial) info</li> <li>• Token lasts for the duration of the journey</li> </ul>	<ul style="list-style-type: none"> <li>• Traveller enrolls once to create a digital identity in mobile digital wallet</li> <li>• Traveller pushes data to a given stakeholder pre-travel; verified via mobile or in-person</li> <li>• Digital wallet contains any data a traveller chooses</li> <li>• Data lives indefinitely, or for the lifespan of travel document</li> </ul>
END-TO-END INTEGRATION	<div>No 'one-off' traveller requirements to enrol</div> <div>No traveller requirements prior to each trip</div> <div>Travellers approach any/all checkpoints (e.g. car rental), and a facial recognition scan is taken</div>	<div>No 'one-off' traveller requirements to enrol</div> <div>At first point of journey, valid biometrically-enabled document is provided &amp; image captured to confirm biometrics</div> <div>Travellers approach any/all checkpoints (e.g. car rental), and a facial recognition scan is taken</div>	<ul style="list-style-type: none"> <li>• Traveller uses a digital ID-mgmt. app to scan their passport and add other data</li> <li>• App verifies digital identity, and uploads verification results to the public blockchain</li> <li>• Pre-travel, traveller receives minimum data reqts. from stakeholders &amp; pushes data to them via blockchain as desired</li> </ul> <div>Travellers approach any/all checkpoints (e.g. car rental), and a facial recognition scan is taken</div>
	<ul style="list-style-type: none"> <li>• Identity authenticated via connecting to government data system</li> </ul>	<ul style="list-style-type: none"> <li>• Identity authenticated and data shared via traveller's token is verified</li> </ul>	<ul style="list-style-type: none"> <li>• Identity authenticated and traveller info shared on blockchain is verified</li> </ul>

Examples of existing initiatives, by type:

	GOVERNMENT	PER TRIP	PER LIFE
EXAMPLES	<b>Traveller Verification Service (TVS, USA)</b> 	<b>Passenger Identification Programme (London Heathrow, UK)</b> 	<b>Chain of Trust Project (Canada)</b> 
	<ul style="list-style-type: none"> <li>Obtains facial biometrics from mandated govt. databases</li> <li>Partner airlines and airports capture live photos of travellers approaching biometric capture interfaces for authentication</li> <li>A multitude of airlines and airports have undertaken pilots with TVS – primarily for biometric boarding</li> </ul>	<ul style="list-style-type: none"> <li>Utilises “Per Trip” travel token that lasts 24-hours</li> <li>Leverages infrared facial biometric cameras at touch points (e.g., bag drop, gate) to facilitate authentication of travellers</li> <li>Heathrow testing use of off airport enrolment via mobile device and the USA’s TVS (left)</li> </ul>	<ul style="list-style-type: none"> <li>Used to identify low-risk individuals to facilitate processing and improve the traveller experience</li> <li>Traveller uploads/verifies core biographic data and facial image to enrol, creating a traveller token that lasts for the life of a passport</li> <li>Traveller data is sent to the cloud for identity verification</li> </ul>

Each model has a series of limitations and ‘open’ topics for exploration:

	GOVERNMENT	PER TRIP	PER LIFE
LIMITATIONS	<ul style="list-style-type: none"> <li>Travellers can’t verify other aspects of their identity (e.g. driving license) or travel (e.g. bookings)</li> <li>Some travellers may not yet have biometrics captured</li> </ul>	<ul style="list-style-type: none"> <li>Legislation/regulatory changes required before govt. officials would accept such digital identities for ID authentication</li> </ul>	
TOPICS FOR EXPLORATION	<ul style="list-style-type: none"> <li>Process of sharing data with non-governmental entities</li> <li>Ability for private sector stakeholders to connect to government databases, and the infrastructure associated with enabling such connections</li> </ul>	<ul style="list-style-type: none"> <li>Ensuring that traveller authentication processes are explicit and secure enough to ensure stakeholder trust</li> <li>Deciding who invests in and pays for the infrastructure required to create and maintain these systems</li> <li>Evaluation requirements for a ‘per-trip’ token to extend beyond a single airport environment</li> <li>Ensuring the ‘per-trip’ token lasts for the entire journey</li> <li>Understanding how data is shared with stakeholders prior to reaching a touchpoint</li> </ul>	<ul style="list-style-type: none"> <li>Deciding what data should be integrated into a ‘per-life’ digital identity</li> <li>Deciding who establishes the traveller’s identity, and at what point in the traveller lifecycle this should be established</li> </ul>

The above limitations, combined with variations in regulation/implementation requirements across the globe, mean that it is **infeasible that one single method** can be used to address the end-to-end journey in full. Any fully ‘end-to-end’ approach that encompasses non-air travel will almost certainly have a ‘Per-Trip’ or ‘Per-Life’ model at its core, interacting with government databases where required.

It is therefore vital the sector identifies opportunities to:

- Assess the latest ‘minimum’ information requirements for all stakeholders, particularly in light of changes due to COVID-19
- Integrate health data in a uniform way, alongside existing information

- Integrate the government-driven model with per-trip/per-life models
- Integrate providers across the end-to-end journey, particularly those outside of the airport ecosystem, via continued collaboration with industry partners undertaking these initiatives

### Safe and Seamless Traveller Journey – (ii) Ensure Data Privacy, Control and Trust

To enable the 'Per-Trip' and 'Per-Life' models, traveller data will be stored and shared across multiple stakeholders in the traveller journey. There are 3 key data facilitation methods to enable this: (a) centralised, (b) decentralised, and (c) hybrid methods.

	CENTRALISED	DECENTRALISED	HYBRID
ABOUT	Traveller data is <b>stored and managed on a central platform</b>	Traveller data is <b>stored on the traveller's mobile device</b> and pushed to travel providers	Uses <b>both centralised and decentralised</b> methods within a single traveller journey
DESCRIPTION	<ul style="list-style-type: none"> <li>• Travel providers can connect to this platform where required</li> <li>• Central platform can be managed by either a private corporation or government</li> </ul>	<ul style="list-style-type: none"> <li>• At checkpoints, travellers are presented with the opportunity to share data or messages with the travel provider</li> <li>• Where appropriate, travellers can share 'zero knowledge' messages, whereby providers can verify existing data without having received it</li> <li>• The traveller controls when the life of their digital ID ends, and the data is purged</li> </ul>	<ul style="list-style-type: none"> <li>• Travellers control the triggering of their data to travel providers at certain checkpoints, while others (e.g. border crossings) will continue to leverage centrally stored data</li> </ul>
EXAMPLE	<ul style="list-style-type: none"> <li>• <b>Clear</b> (Private sector, USA)</li> <li>• <b>UAE's</b> immigration 'Smart Gates' (Public sector)</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Apple Pay</b> (users manage their information, which lives securely on their device)</li> </ul>	<ul style="list-style-type: none"> <li>• --</li> </ul>
KEY OPEN QUESTIONS	<ul style="list-style-type: none"> <li>• How can travel providers be encouraged to use common centralised systems, to avoid travellers having to participate in multiple solutions?</li> <li>• Are governments willing/able to share information with other stakeholders?</li> <li>• Which parties are best suited to run centralised solutions?</li> <li>• How and when should traveller consent be required (and, just as easily, revoked)?</li> </ul>	<ul style="list-style-type: none"> <li>• Is the travel industry open to establishing secure connections to trusted 3<sup>rd</sup> party providers to create a meaningful ecosystem?</li> <li>• What common standards for data processing and transmission will allow for sufficient data security?</li> <li>• How can travel providers be expected to trust and manage data sourced from 'untrusted' mobile devices?</li> </ul>	<ul style="list-style-type: none"> <li>• Combines the questions of its component parts, with an additional level of integration required</li> </ul>

The **hybrid** option will almost certainly be required for successful implementation. The flexibility to utilise a centralised and decentralised platform in a single journey will be required for all stakeholders to participate in an end-to-end solution. The reality is that certain stakeholders, such as governments, will always maintain a centralised platform – whilst other stakeholders, such as travel providers, will be willing to remove the data liability and pass it back to the traveller via a decentralised platform.

**Adhering to 'Best-Practice' Data Privacy Regulation:** WTTC documents in detail how the seamless traveller journey can adhere to GDPR standards, please refer to respective documents for details.

**WTTC suggests the following next steps for the implementation of the seamless traveller journey:**

- Evaluate the privacy and data sharing implications of each model, and provide progress reports with next steps around data privacy, traveller data envelope best practices and standards
- Travel providers should perform a 'Data Protection Impact Assessment' (DPIA), which offers a case-by-case assessment of the specific challenges, risks, legal issues and mitigating measures of data processing activities. In the context of aforementioned facilitation options, performing a DPIA is obligatory under EU law.
- Build alignment across stakeholders while driving the execution and evaluation of global end-to-end round-trip air and non-air pilots

**UNWTO 'Healing Solutions for Tourism' Finalists**

Below is a brief overview of the finalists for UNWTO's 'Healing Solutions for Tourism'

UNWTO 'Healing Solutions for Tourism' Finalists		
Name	Solution	Description
Semmelweis	Hand hygiene scanner	<ul style="list-style-type: none"> <li>• Scanner providing hand hygiene training for travel and tourism employees</li> </ul>
Outpost Healthy Destinations	Healthcare app	<ul style="list-style-type: none"> <li>• Online healthcare for travellers/communities, providing assurances that destinations can 'promptly deal with a range of illnesses'</li> </ul>
SeeTrue	A.I. for airport scanners	<ul style="list-style-type: none"> <li>• Machine learning tools for airport X-ray/CT machines to better identify prohibited items via AI, so that only required bags are opened</li> </ul>
Checkpoint	Capacity sensor	<ul style="list-style-type: none"> <li>• High-accuracy capacity measurement for businesses</li> </ul>
MyStay	Guest communication	<ul style="list-style-type: none"> <li>• Guest-facing web app that allows accommodation to communicate with guests, also offers online check-in/check-out</li> </ul>
Waam	Disinfection gates	<ul style="list-style-type: none"> <li>• Disinfects traveller clothes/luggage</li> <li>• Designed for tourism-related establishments</li> </ul>
Airside	Digital identification	<ul style="list-style-type: none"> <li>• Leading provider of privacy-based digital ID solutions that empower seamless travel</li> </ul>
Beautiful Destinations	Marketing plan	<ul style="list-style-type: none"> <li>• 'Recovery marketing plans' use digital and mobile-first storytelling and social media communities to help tourism marketers</li> </ul>
iBonus	Contact tracing	<ul style="list-style-type: none"> <li>• Mobile app and dedicated terminals record when and where visits/interactions occur, and notify exposure to infected persons</li> </ul>

## 2.5 A More Sustainable, Resilient and Inclusive Travel & Tourism Sector

The United Nations Secretary-General, Antonio Guterres in his Policy Brief ‘COVID-19 and Transforming Tourism’<sup>1</sup> recalled that “It is imperative that we rebuild the tourism sector. But it must be in a way that is safe, equitable and climate friendly. Transport-related greenhouse gas emissions could rebound sharply if recovery is not aligned with climate goals. Supporting the millions of livelihoods that depend on tourism means building a sustainable and responsible travel experience that is safe for host communities, workers and travellers.” Furthermore, the Policy Brief notes that women, youth indigenous communities and workers in the informal economy, including those working in the cultural sector, are at most risk from job losses and business closures across the tourism sector and that “unnecessary obstacles for travellers with disabilities and seniors should be avoided and safety measures adapted” under the new conditions.

As stated by the UNWTO<sup>1</sup>: *“The COVID-19 crisis has emphasised the need to strengthen the resilience of the tourism sector and awakened a sense of unity and interconnectedness among tourism stakeholders. This crisis has highlighted both the fragility of the natural environment and the need to protect it, as well as the intersections of tourism economics, society and the environment like nothing before in history. It represents an opportunity to accelerate sustainable consumption and production patterns and build back better tourism. As governments and the private sector are now embarking on a path for recovery, there is no better timing for placing future generations at the centre of the action.”*

This chapter explores current policy prioritisations and existing initiatives, by summarising insights from the Delphi study as well as highlighting key policy recommendations by UNWTO and WTTC.

### Results in a nutshell

**Participants of the Delphi study** forecast that the current COVID-19 crisis will **further increase** the relevance and urgency of sustainability topics. The pandemic is generally seen as a ‘reset’ providing overall positive effect on sector sustainability. While a majority expect that they will focus more on sustainability in the coming years, 2/3 also fear that immediate investments will be postponed due to the current crisis.

Participants prioritise **initiatives** around decarbonisation and destination stewardship:

- **Decarbonisation and carbon removal** is #1 priority; to achieve **lower emissions of the airline industry**, experts recommend tax incentives and public sector investment in cleaner plans (e.g. hydrogen-powered); however, also strong calls for more efficient scheduling and route planning and expanding carbon offsetting/removal programmes
- **Destination stewardship/community engagement** and circularity and waste reduction (#2); strong interest in more ‘**slow tourism**’ initiatives’, e.g. via better/more targeted ‘circuits’ and itineraries, incentivisation and promotion

Participants are also clear advocates for concrete next steps to ensure the sector can achieve these sustainability goals, e.g. strong interest in **sustainability guidelines** as well as **sustainability monitoring and reporting**.

<sup>1</sup> [https://www.un.org/sites/un2.un.org/files/sg\\_policy\\_brief\\_covid-19\\_tourism\\_august\\_2020.pdf](https://www.un.org/sites/un2.un.org/files/sg_policy_brief_covid-19_tourism_august_2020.pdf)  
<https://www.un.org/press/en/2020/sgsm20218.doc.htm>



UNWTO and WTTC have both released a series of publications detailing how the sector can and should emerge sustainably, leaving no one behind, from the COVID-19 crisis, including:

- UNWTO: One Planet Vision for a responsible recovery of the tourism sector<sup>1</sup>
- UNWTO: COVID-19 and the vulnerable groups<sup>2</sup>
- UNWTO: Cultural Tourism & COVID-19
- WTTC: To Recovery and Beyond<sup>3</sup>

This chapter gives an overview of some of the suggested policies.

### 2.5.a Delphi Study and Ministers' Summit Contributions

Panellists at the Ministers' Summit explored the 'green' and more sustainable future of travel in great detail, discussing several concrete examples.

A 'greener' travel and tourism sector, to combat climate change, is clearly seen as a priority for the recovery:

- James Thornton, CEO, Intrepid Travel: *"We are obviously facing the most severe crisis in 30-40 years, and while COVID is absolutely devastating for the travel industry, ultimately climate change will be more devastating, if we don't rebound responsibly. [...] **there is no vaccine for climate change**; so if we don't take this opportunity to respond with slow travel and more meaningful travel then we're facing even worse disaster, potentially in 20-30 years' time"*
- John Holland-Kaye, CEO, Heathrow: *"Actually, just before the COVID crisis hit, the aviation sector was the first to commit to net zero emissions by 2050. This is significant because aviation has always been excluded from global climate change deals. Aviation is not the enemy, carbon is the enemy. Our job, if we are to have an aviation sector and the ability for people to travel in 40-50 years' time, is to protect the benefits of aviation in a world without carbon. [...] The most fundamental change will be the fuel that powers the planes. Moving from fossil fuels to **sustainable aviation fuels** which are made either from waste or from synthetics. All that technology exists today, we just need to scale it up to a point that it can be a viable part of the solution. There is no reason why 10% of all the fuels that power planes should not be from sustainable sources in 10 years' time, and 50-100% by 2050. The gap really is the commitment from both the sector and the energy companies to scale up the production. This is where we need help from governments, to set mandates that require a certain take-up of sustainable aviation fuels over time"*
- Gustavo Segura Sancho, Minister of Tourism, Costa Rica: *"We chose the path of being a sustainable tourism model, but now more than ever is the time to reinforce this positioning, that's what travellers are going to be looking for right now. [...] Earlier this year, Costa Rica submitted a pioneering proposal to **reduce deforestation through the use of technology**, and space information generated by satellite images, from Google Earth Engine; so we can monitor the forest coverage. We recently also launched a Carbon Footprint Offset platform, so visitors coming into*

<sup>1</sup> <https://webunwto.s3.eu-west-1.amazonaws.com/s3fs-public/2020-06/one-planet-vision-responsible-recovery-of-the-tourism-sector.pdf> (June 2020)

<sup>2</sup> <https://www.unwto.org/covid-19-inclusive-response-vulnerable-groups>

<sup>3</sup> <https://wttc.org/Research/To-Recovery-Beyond> (27<sup>th</sup> September 2020)

*Costa Rica can enter a website on which they can calculate their submissions and pay a small fee, 5-10 pounds, voluntary fee, that goes into a fund that pays environmental services in local eco-tourism, local sustainable agriculture farms here in Costa Rica. [...] We give the “Pura Vida” pledge: in the UK market we have recently launched a programme to communicate the real meaning of responsible travel to our visitors. “Pura Vida” is a phrase that we use here in Costa Rica, it resembles our way of living. We have taken wellness as a way of life. We are focusing on communicating this to the Tourism sector“*

**Social responsibility** is equally important to the panellists:

- James Thornton, CEO, Intrepid Travel: *“We have been carbon neutral since 2010, but for a company like us being carbon neutral isn’t enough now. Over the last 3 years, we’ve had record growth, record profitability, doubled the size of the company, but we have also become a certified “B Corp”, so we are looking to use **business as a force for good**; talking about openness, honesty, transparency. We have done some incredible things in the purpose space, like science-based tourism initiatives, doubling our number of female leaders, more steps towards inclusion, our Reconciliation Action plan here in Australia. [...] We try to make people change the way they see the world. We do that by taking you to over 100 countries, very small groups, meeting local people, trying local food. Staying in different types of local accommodation, and really get under the skin of the destination, and ultimately realise that be in race, be it gender, be it religion, age, fundamentally we have more similarities than we have differences. [...] Post-pandemic, we have to rebuild responsibly, in absolutely every area, it’s not just climate, more sustainable travel businesses, it’s every aspect in terms of diversity more inclusion as well”*
- Thomas Ellerbeck, Member of the Group Executive Committee, TUI Group: *“Tourism is much more than sun, beach, wonderful water and everything it’s also about **intercultural dialogue**; it’s about learning, it’s about going to Petra to learn about history, it’s about going to Greece to learn about the routes of our democracy; as we’re seeing a lot of nationalism around the world, I can only encourage people to travel more, because the more you know the world the more you will understand the world and be more open and it will be a more diverse world”*
- Bernadette Romulo-Puyat, Secretary of the Department of Tourism, Philippines: *“The Philippines has always been into **sustainable tourism**; always made sure that our tourism was inclusive, helps the farmers, indigenous people, the poorest of the poor; we’re merely continuing with what we’ve been implementing in the past”*
- Inge Huijbrechts, Global SVP Responsible Business and Safety & Security, Radisson Hotel Group: *“The crisis has brought out the best in people; we have seen **our people being involved in initiatives** like food donations, us of discarded linens to create face masks for community in needs, housing for first-line workers etc, so even at the height of the crisis the responsible attitude and responsible actions have continued. I must say this hasn’t taken us off our **ambitious sustainability targets**; during the crisis, and this was in September, we have extended our 5-year plans and issued the ambitious carbon-reduction target of 30% in just 5 years, to be on route for full carbon neutrality by 2050. We maintain our commitments, like 100% carbon neutral meetings, and the phase-out of single-use plastics; we get a lot of questions on single-use plastics, and at the height of the crisis with all the PPE used around the world we know that the Health & safety is a priority but we will come back to our commitment of **phasing out single-use plastics** in due time, and we are sticking to it. [...] And we are sticking with our reduction of food waste with our food and*



*beverage transformation programme. So, the innovation we had to go through during this crisis will also lead to a stark reduction in food waste, for example.”*

There was also consensus that a **balance between economic growth and sustainability** can be found:

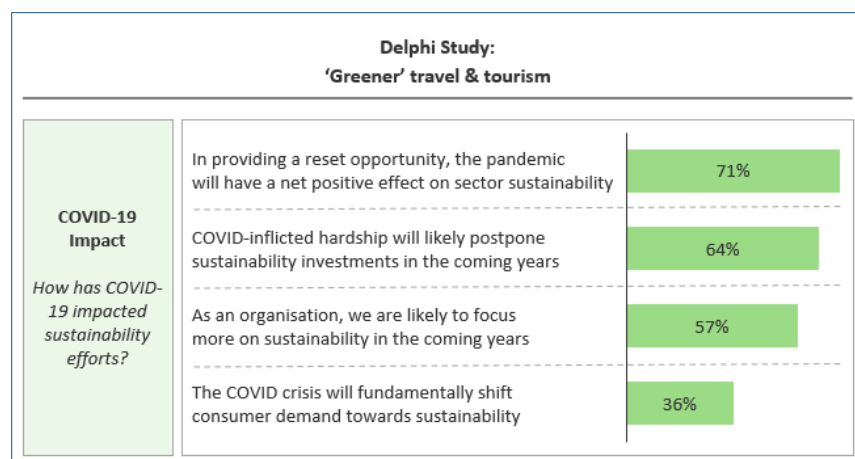
- Nigel Huddleston, Minister for Sport, Tourism and Heritage for Digital, Culture, Media and Sport, UK Government: *“I think you **can have economic growth and you can still be environmentally responsible**. The tourism and hospitality sector has done a pretty good job over the last few years of recognising this. From the aviation sector, recognising you can have more environmentally-friendly planes, to hotels and other organisations reducing waste and focusing on carbon reduction; and many companies have actually independently committed to be carbon neutral. The responsibility across the entire sector – both private sector and governments – is recognised. [...] But also it’s really important to recognise the contribution of tourism to sustaining our environment. Some national parks around the world wouldn’t exist if it wasn’t for the money that was brought in through tourism. We absolutely need to get the right balance here. [...] We have seen substantial economic growth over the last 20 years but also massive reduction in carbon emission, massive increase in recycling, massive reduction in plastic waste and usage. So we can all be responsible while creating economic growth. It is possible, but it takes a bit of effort.”*

Experts stress the importance to implement **new metrics to measure travel and tourism**:

- Inge Huijbrechts, Global SVP Responsible Business and Safety & Security, Radisson Hotel Group: *“As a destination, there is an opportunity to measure tourism differently. It’s not just about number of international arrivals, dollars, it’s also how do we measure responsible tourism and tourism as a whole. There is an **excellent UNWTO initiative** started in 2016, which is about measuring sustainable tourism. I’d urge the whole industry to use this framework and start resetting the paradigm and conversation about tourism and travel in such a way. And if we then manage to distil from this very comprehensive framework just a simple way of communicating those positive impacts to travellers and consumers, then we have the holy grail to really change that mindset and build back better.”*

**Delphi study:** While ‘green’ travel & tourism has been an important topic for many years, experts participating in the Delphi study believe that the current COVID-19 crisis will **further increase** the relevance and urgency of the sustainability topic. However, most experts expect a short-term hit to investments.

- 71% see the pandemic ‘reset’ as providing an overall positive effect on sector sustainability, and 57% plan to focus more on sustainability in the coming years; *“it is clear that even as we grapple to address the short- and long-term effects of the pandemic, sustainability should remain top of mind as a guiding principle in policy actions”*
- However, 64% will see sustainability investments postponed by COVID-19-inflicted hardship



This chapter gives an overview along the topics raised in the Delphi study:

- i) Sustainability goals
- ii) Decarbonisation: Spotlight on air travel
- iii) Community Engagement: Spotlight on 'Slow Tourism'

### Delphi expert views – (i) Sustainability goals

Participants of the Delphi study acknowledge that a broad set of topics need to be addressed:

- **Decarbonisation and carbon removal** (#1 priority) leads the list, in line with the sector's commitment to carbon neutrality by 2050. 84% of participants cited this as a topic for specific focus; *"the faster travelling becomes carbon neutral, the better for the industry"; "decarbonising aviation is one of the most important objectives for industry (alongside Covid-19 recovery)"*
- **Destination stewardship/community engagement** and **circularity and waste reduction** are similarly vital for 3/4 of participants; *"it is crucial to ensure a positive balance [in] social impact on communities", "a liveable place is worth travelling"*
- Action against **human trafficking** and **wildlife trafficking**, whilst of lower direct relevance to some companies, still remain top priorities for 50-60% of participants

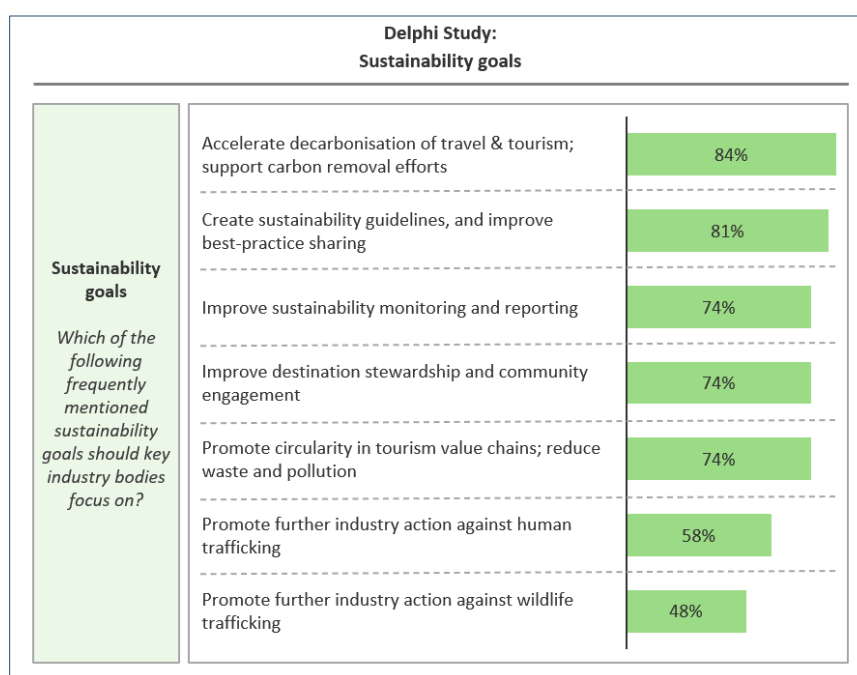
Participants are also clear advocates for concrete next steps to ensure the sector can achieve these sustainability goals:

- **Sustainability guidelines:** seen as an urgent priority by over 80%, participants show a clear need for more industry alignment and the creation of collective, actionable plans; *"we have worked with local actors and the value chain of the tourism sector to design the biosafety protocols that will be fundamental for the reactivation and recovery of the confidence of the tourist in the destination. In the same way, we have built a roadmap that leads us to the recovery of the sector through 4 pillars: liquidity, biosafety, infrastructure and market information and promotion."*
- **Sustainability monitoring and reporting:** almost 75% of respondents believe that increased understanding will lead to more appropriate action, investment and accountability; *"profitability [of tourism operations] must be measured from the perspective of all stakeholders – the planet, communities and environment"*; the majority of participants report to have developed their own measures for sustainability reporting (60%), but almost half of respondents also call for

“governments and int’l organisations to work towards clearer, aligned steps and protocols on how we can assess sustainability” (40%), and “governments and int’l organisations to provide guidance / facilitation of best-practice sharing regarding sustainable practices and business models” (40%)

In terms of concrete goals and initiatives, Delphi participants report the following:

- Carbon reduction or offsetting (implemented in 80% of respondents’ companies)
- Waste reduction and circularity (60%)
- Research/investment into greener solutions or business models (60%)
- Deeper engagement with local communities (40%)
- Improved monitoring of sustainability (20%)
- Other sustainability goals (20%)



Participants’ own sustainability initiatives have been variously impacted by the crisis:

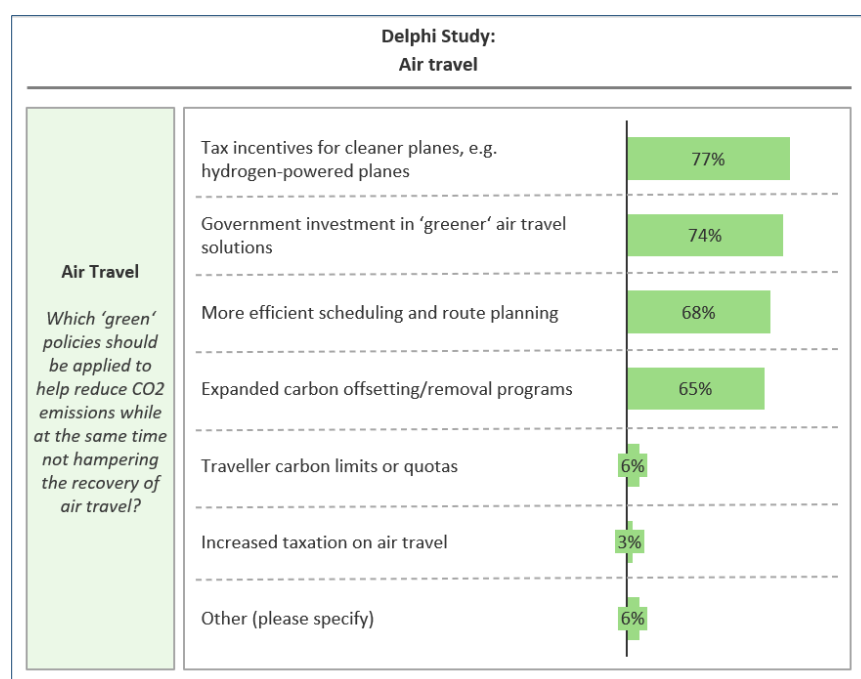
- **Majority report a slowdown in investment and available capital:** *“Slowed down investments”, “initiatives requiring dedicated manpower or expenditure have been curtailed or stopped”, “greatly, we neither have the time or the staff. Survival is where we are at”; “most organisations are focusing on survival, the longer Government restrictions continue the more damage they will conflict. Funds which would have been available for investment are utilised to stay alive”*
- **Others report that efforts are still continuing strong – but budgets are stretched:** *“Still in place”, “at this point, 10 months into the pandemic, initiatives and efforts at sustainability have not waned. However, it remains to be seen how this will unfold as the pandemic evolves”*

#### Delphi expert views – (ii) Decarbonisation: Spotlight on air travel

Reducing CO2 emissions is the #1 priority in the ‘greener tourism’ area. Experts see air travel as an important lever. The following policies are seen as helpful to reduce CO2 emissions while at the same time not hampering the recovery of air travel:

- **Tax incentives and government investment in cleaner planes and other ‘green’ air travel solutions**, e.g. hydrogen-powered planes, sustainable aviation fuel: “Air travel needs to be incentivised to be as green as possible”; sustainable aviation fuel is seen by some as a viable route; “Hydrogen is a medium-term solution, [but...] SAF is the main solution for decarbonising aviation in the next 5-10 years. SAF is can be used in existing aircraft engines now, it just needs to begin manufacture at scale”
- **More efficient scheduling and route planning and expanding carbon offsetting/removal programmes** are also seen as effective and pragmatic solutions.

However, industry experts oppose more stringent and restrictive policies, such as traveller carbon limits or quotas, or increased taxation on air travel. Despite this, there is a strong sense that in the longer-term, the sector will have to rebalance; *“eventually air travel is too cheap as it doesn’t include environmental costs that are later borne by society. Those that travel will have to bear the cost”*



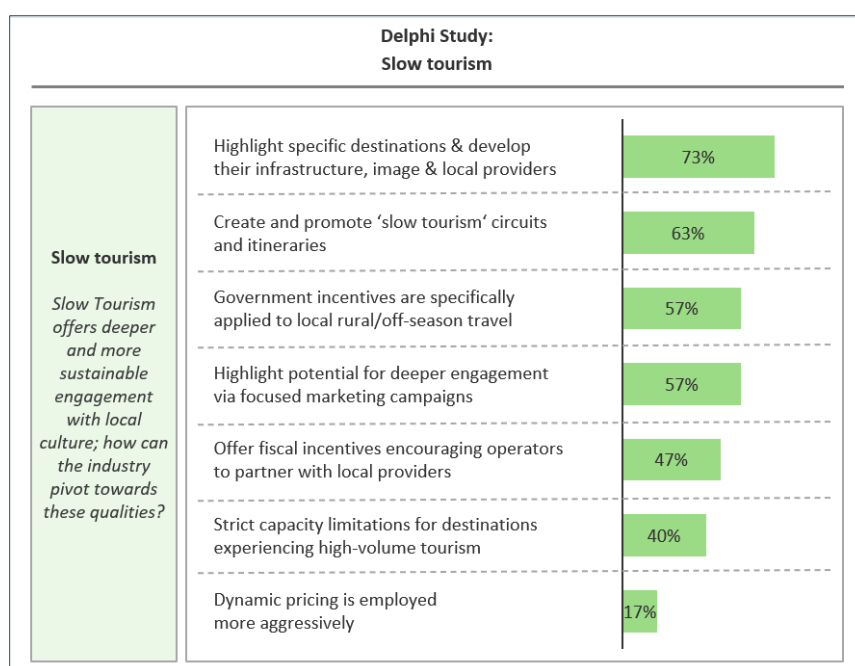
### Delphi expert views – (iii) Community Engagement: Spotlight on ‘Slow Tourism’

Slow tourism aims to offer deeper and more sustainable engagement with local people, cultures, food and music. Accompanying a shift to local tourism, participants of the Delphi study believe that governments have a considerable part to play in encouraging more sustainable local travel:

- **Infrastructure first: ensure the destinations, and circuits, are ready:** Almost 75% of participants encourage governments to highlight specific destinations and ensure readiness via developing their infrastructure, image, and local providers. Accompanied by the creation of specific ‘circuits’

and itineraries, the industry will be set up to offer viable, sustainable 'off-the-beaten-track' domestic tourism products and packages

- **Incentives and promotion second:** c.50-60% favour traveller incentives for local rural/off-season travel, marketing campaigns, and operator incentives to partner with local providers. Where applied, promotion should focus on the depth of engagement; *'the approach should create willingness for travellers to be more responsible and sustainable... feeling good because you've done good for local communities should feel better than achieving the cheapest deal'*
- **Avoid overcrowding, but carefully:** Participants suggest that care should be taken against over-regulation and deterrents; only 40% believe that strict capacity limitations are an appropriate measure, whilst just 17% believe that aggressive dynamic pricing is appropriate to ensure better traveller distribution



## 2.5.b UNWTO and WTTC Recommendations

UNWTO and WTTC have released a series of publications and sets of recommendations detailing how the sector can and should emerge sustainably from the COVID-19 crisis, becoming more inclusive and accessible for all:

- UNWTO: One Planet Vision for a responsible recovery of the tourism sector<sup>1</sup>
- UNWTO: Tourism and Vulnerable Groups<sup>2</sup>
- UNWTO: Recommendations for Action<sup>3</sup>
- UNWTO: Cultural Tourism & COVID-19<sup>4</sup>
- UNWTO: Reopening Tourism for Travellers with Disabilities<sup>5</sup>
- UNWTO: (Rev.) Tips for a Responsible Traveller<sup>6</sup>
- UNWTO: Recommendations For The Tourism Sector To Continue Taking Action On Plastic Pollution During Covid-19 Recovery<sup>7</sup>
- WTTC: To Recovery and Beyond<sup>8</sup>

This chapter summarises some of these initiatives and next steps for the sector.

*Please note that the following is intended as an introductory summary only, consolidating select content from both UNWTO and WTTC sources. For further details, please see the documents above.*

### Recommended policies (Summary of UNWTO and WTTC policy recommendations)

We summarise policy recommendations to guide a responsible recovery along 3 key pillars.

- Climate Action
- Social Inclusion
- Green Crime and Human Trafficking

<sup>1</sup> <https://webunwto.s3.eu-west-1.amazonaws.com/s3fs-public/2020-06/one-planet-vision-responsible-recovery-of-the-tourism-sector.pdf> (June 2020)

<sup>2</sup> <https://www.unwto.org/covid-19-inclusive-response-vulnerable-groups>

<sup>3</sup> [https://webunwto.s3.eu-west-1.amazonaws.com/s3fs-public/2020-04/COVID19\\_Recommendations\\_English\\_1.pdf](https://webunwto.s3.eu-west-1.amazonaws.com/s3fs-public/2020-04/COVID19_Recommendations_English_1.pdf)

<sup>4</sup> <https://www.unwto.org/cultural-tourism-covid-19>

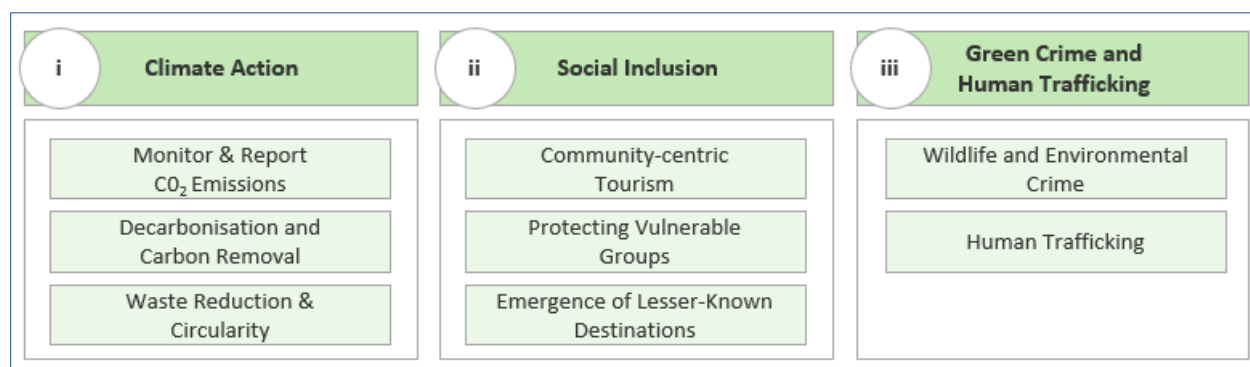
<sup>5</sup> UNWTO, European Network for Accessible Tourism and Fundación Once, “Reopening Tourism for Travelers with Disabilities: How to Provide Safety Without Imposing Unnecessary Obstacles”, August 2020, available at <https://webunwto.s3.eu-west-1.amazonaws.com/s3fs-public/2020-08/REOPENING.pdf>

<sup>6</sup> In 2020 the World Committee on Tourism Ethics revised the 2017 version of the Tips for a Responsible Traveller to include relevant provisions on ensuring safe and secure travel, as a response to COVID-19. Available at <https://webunwto.s3.eu-west-1.amazonaws.com/s3fs-public/2020-07/Tips-for-Responsible-Traveller-WCTE-EN.pdf>

<sup>7</sup> <https://webunwto.s3.eu-west-1.amazonaws.com/s3fs-public/2020-07/200722-recommendations-for-tackling-plastics-during-covid-recovery-in-tourism.pdf>

<sup>8</sup> <https://wtcc.org/Research/To-Recovery-Beyond> (27<sup>th</sup> September 2020)

## Recommended policies (UNWTO, WTTC) – Overview of key initiatives



## Key initiatives – (i) Climate Action

Climate Action (overview)	
a. Monitor and report CO <sub>2</sub> emissions	<ul style="list-style-type: none"> <li>Strengthen measurement and disclosure of emissions; this will also enable destinations to assess implications of investments</li> <li>Promote the introduction of science-based targets, which will allow the sector to effectively contribute to the implementation of NDCs to the Paris agreement</li> </ul>
b. Decarbonisation and carbon removal	<ul style="list-style-type: none"> <li>Invest in low-carbon transportation options/greener infrastructure, and provide SMEs with technical/financial support to successfully transition to decarbonised operations</li> <li>Enhanced mitigation will also provide a competitive advantage (vs. the cost of inaction) in the long run battle with Climate Change <ul style="list-style-type: none"> <li>In air travel, investment in 'greener' travel solutions, e.g. sustainable aviation fuels, will be key</li> </ul> </li> <li>Doing so will also appeal to consumers demanding that the sector take responsibility for its emissions, and would like to take part in such efforts</li> <li>Carbon removal efforts will also be vital <ul style="list-style-type: none"> <li>Natural methods (restoring high-carbon density ecosystems) and carbon removal technologies are both required for the sector to cut emissions by 50% by 2030, and achieve carbon neutrality by 2050</li> </ul> </li> </ul>
c. Waste reduction and circularity	<ul style="list-style-type: none"> <li>Shift towards a circularity of plastics in tourism <ul style="list-style-type: none"> <li>Engage the value chain to advance the use of recyclable/compostable plastics and collaborate on recycling efforts</li> <li>This will reduce marine litter and plastic pollution, preserve destination attractiveness, and trigger multi-stakeholder collaboration on broader topics – improving public health</li> </ul> </li> <li>Invest in transforming tourism value chains <ul style="list-style-type: none"> <li>Reduce economic leakages and waste/pollution via reducing, reusing, repairing, refurbishing/remanufacturing, recycling and repurposing</li> <li>Efficient use of energy and water is essential</li> <li>Supporting the integration of circular economy processes in tourism can promote innovation, create new sustainable business models, add value for customers</li> </ul> </li> <li>Prioritise sustainable food approaches for circularity <ul style="list-style-type: none"> <li>Promote sustainable procurement (local/organic/surplus/collective sourcing)</li> <li>Promote sustainable menus (healthy and plant-rich dishes)</li> <li>'Mainstreaming' food loss and waste reduction can reduce costs and improve efficiencies, whilst curbing CO<sub>2</sub> emissions</li> </ul> </li> </ul>



## Key initiatives – (ii) Social Inclusion

Social Inclusion (overview)	
a. Community-centric tourism	<ul style="list-style-type: none"> <li>Ensuring local communities have a prominent voice/role in long-term inclusive and sustainable tourism strategies, alongside short-term crisis management and recovery, is mutually beneficial for all stakeholders:</li> <li>Such an increased role will result in enhanced resilience to future shocks, whilst integrating local wisdom and enhancing local satisfaction with tourism</li> <li>Local tourism councils can facilitate local engagement whilst boosting destination stewardship, as local communities drive action for preservation of cultural and natural assets               <ul style="list-style-type: none"> <li>The Canadian region of Thompson Okanagan, for instance, embarked on the implementation of a regional tourism strategy in 2012, produced through consultations with 1,800 stakeholders. This gained endorsement from all affected communities, including 33 indigenous First Nations groups. Representing 4,500 local businesses and emphasising sustainability and holistic destination management, the strategy successfully increased tourism throughout the year, with businesses earning 80% of their revenues over 110 days, compared to just 45 days six years prior, thanks to the greater diversity of products and experiences offered by the destination</li> </ul> </li> </ul>
b. Protect vulnerable groups	<ul style="list-style-type: none"> <li>The sector should ensure that specific communities and demographics who are heavily reliant on tourism (e.g. youth, women, rural or indigenous) are supported               <ul style="list-style-type: none"> <li>Small Island Developing States have been particularly severely hit – both via massive loss of jobs, and curbs to public budgets that leave governments unable to respond</li> </ul> </li> <li>By reconsidering labour regulations, governments should ensure enough flexibility for employers to feel comfortable hiring, but that sufficient protections are in place to ensure job security, workplace safety and cushion against any unexpected crises.</li> </ul>
c. Emergence of lesser-known destinations	<ul style="list-style-type: none"> <li>With travellers progressively favouring journeys “off the beaten path”, promoting lesser-known destinations not only broadens the sector’s economic benefits beyond hotspots, but also addresses existing concerns associated with crowds               <ul style="list-style-type: none"> <li>“The outbreak can be used by the Travel &amp; Tourism sector to spread tourism wider and make it more sustainable” (Darrell Wade, Chairman of Intrepid – who published an annual “Not Hot List of Alternatives to Overtouristed Destinations”)</li> </ul> </li> <li>Targeted destination marketing strategies should emphasise emerging destinations and highlight smaller, lesser-known operators within these destinations               <ul style="list-style-type: none"> <li>The region of Veneto in Italy, for instance, is planning to leverage lesser-known UNESCO World Heritage sites to draw visitors away from Venice</li> </ul> </li> <li>Thailand is focusing on the promotion of 55 emerging destinations, an initiative which is also intended to generate jobs in rural areas</li> </ul>

## Key initiatives – (iii) Green Crime and Human Trafficking

Green Crime and Human Trafficking (overview)	
a. Wildlife and environmental crime	<ul style="list-style-type: none"> <li>Green crime, which includes illegal wildlife trade and environmental crime, is effectively valued as a \$260 billion industry and is growing at 7% annually</li> <li>Conservation programmes’ inability to operate has left local communities, nature, and wildlife at risk. As tourism-dependent communities are suffering from economic hardship, some are turning to illegal fishing and poaching protected animals for food               <ul style="list-style-type: none"> <li>A South African rhino rescue organisation stated that it faced one poaching incident every day since the national lockdown began</li> </ul> </li> <li>The presence of tourists and tour guides plays a role in animal protection. As the sector recovers, a renewed interest in conservation activities and renewed resources for effective action are expected, given increased appreciation for nature, animals, and the great outdoors.               <ul style="list-style-type: none"> <li>Nicole Robinson, CMO of &amp;Beyond, echoed this sentiment explaining ‘with one vehicle and a camera, we are able to impact how many more people think about how nature works, and perhaps how they can impact sustainability going forward’</li> </ul> </li> <li>Positively, travellers have gained greater awareness of global wildlife issues as the media focuses on the connection between wildlife trade, habitat disruption, and pathogen spread</li> </ul>



	<ul style="list-style-type: none"> <li>COVID-19 has been devastating for conservation programmes, given the segment's significant reliance on sustainable Travel &amp; Tourism             <ul style="list-style-type: none"> <li>In 2018, 85% of South Africa's funding for the country's wildlife and public land management authority came from tourism-related sources such as park entry fees</li> <li>A survey of global conservationists in March-April 2020 highlights this with 78% of conservationists stating that they have been negatively impacted by the pandemic, including lay-offs, frozen donations or funding cuts, cancellations of seasonal crews and the inability to fully perform job responsibilities.</li> </ul> </li> <li>OI Pejeta, a Kenyan conservancy and sanctuary for the endangered black rhino, expects to lose 70% of its anticipated business this year, income that goes directly into conservation efforts</li> </ul>
b. Human trafficking	<ul style="list-style-type: none"> <li>Over 40 million individuals were subject to human trafficking and modern slavery in 2019 alone</li> <li>More can be done in the implementation of tangible solutions to counteract and even prevent human trafficking from occurring</li> <li>Raising awareness at the governmental, industry and consumer level is essential. It is proven that the more we know, the more we can do to prevent this crime             <ul style="list-style-type: none"> <li>The UK's Modern Slavery Act, for instance, which was established in 2015, created a new statutory defence for slavery or trafficking victims compelled to commit criminal offences and enables private sector transparency by requiring big businesses to make public their initiatives to tackle the issue, across their businesses or supply chains</li> </ul> </li> <li>Education and training, both for employees and travellers alike, remains a priority to better identify and report suspected cases</li> </ul>

### Recommended policies (UNWTO, WTTC) – Suggested next steps

i Climate Action	ii Social Inclusion	iii Green Crime and Human Trafficking
<ul style="list-style-type: none"> <li>Guidelines for Climate Action</li> <li>Financial Incentives</li> <li>Rebuild Responsibly</li> </ul>	<ul style="list-style-type: none"> <li>Increase Community Engagement</li> <li>Strike a Balance with Labour Regulations</li> <li>Promote 'Slow Tourism' and Crowd Management</li> </ul>	<ul style="list-style-type: none"> <li>Ban Wildlife Trafficking</li> <li>Improve Conservation Monitoring &amp; Awareness</li> <li>Further Legislate against Human Trafficking</li> </ul>

### Suggested next steps – (i) Climate Action

Climate Action (next steps)	
a. Establish guidelines on climate action	<ul style="list-style-type: none"> <li>Industry-specific, sector-wide guidelines should be established, in collaboration with multiple governments and destinations</li> <li>This will provide a prerequisite for sustainability recognition or certification</li> <li>Governments should also consider setting up public platforms to actively evaluate and monitor sustainability along these lines</li> </ul>
b. Strengthen financial incentives	<ul style="list-style-type: none"> <li>By enabling operational cost savings for a business, financial incentives can nudge major structural change: Example incentives include tax breaks, insurance premium discounts, concessional loans, or grants for a variety of sustainability upgrades</li> <li>In the UK, for example, the Non-Domestic Renewable Heat Incentive (RHI) provides financial support in the form of a quarterly payment for twenty years to any businessowner, across sectors including Travel &amp; Tourism, that has put in place renewable heat technologies</li> </ul>
c. Rebuild responsibly	<ul style="list-style-type: none"> <li>A number of industry bailouts have been tied to conditions on climate action, requiring businesses to reduce their environmental footprint and adopt more sustainable practices:</li> <li>Austrian airlines agreed to a financial support package contingent on sustainability requirements, including halving CO<sub>2</sub> emissions by 2030 and increased jet fuel efficiency</li> </ul>

	<ul style="list-style-type: none"> <li>• It is expected that products and experiences that have sustainability and resilience at their core will receive more funding from governments and investors going forward</li> <li>• Financial incentives are more important than ever, with businesses struggling to balance competing priorities of sustainability and cost management during the economic downturn</li> <li>• 'The global economic damage of the pandemic, people will focus on economic survival, rather than prioritising sustainability during the recovery' (Luis Araujo, CEO of Turismo de Portugal)</li> </ul>
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### Suggested next steps – (ii) Social Inclusion

Social Inclusion (next steps)	
a. Increase engagement with local communities	<ul style="list-style-type: none"> <li>• Businesses and governments should more actively engage with local communities to tackle these complex issues and promote sustainable living</li> <li>• Public private-community partnerships should be bolstered; it is critical to engage local communities in the planning process to jointly define how to achieve their goals as a destination. There is no "one size fits all" approach to circumvent this collaboration.</li> <li>• Businesses can further engage local communities in which they work by prioritising local employment initiatives, and providing mentorship for local entrepreneurship ventures</li> </ul>
b. Strike a balance with labour regulations	<ul style="list-style-type: none"> <li>• A consultative approach is required between the public sector, private sector and unions</li> <li>• France provides a strong example; alongside broader job retention support, the government simultaneously extended the deadline for payment of profit-sharing agreements and ruled that businesses can oblige employees to take paid holidays and increase working hours for essential activities</li> </ul>
c. Promote 'slow tourism' and crowd management	<ul style="list-style-type: none"> <li>• Budgets must shift from standalone 'promotion' towards spending on sustainable and inclusive tourism planning and management <ul style="list-style-type: none"> <li>– Destination-readiness will be essential to ensure the long-term sustainability of local communities as well as cultural and natural assets</li> </ul> </li> <li>• For highly vulnerable destinations, authorities may consider limiting capacity <ul style="list-style-type: none"> <li>– E.g. Philippines reduced the number of rooms/day-trips on the island of Boracay, following rehabilitation</li> <li>– However, while spreading tourism and managing crowds will be key, Travel &amp; Tourism should not become an exclusive, high-priced experience for the select few</li> </ul> </li> <li>• Digital solutions will increasingly be integrated to support in the management of crowds and physical distancing within top attractions, such as theme parks and museums <ul style="list-style-type: none"> <li>– Shanghai Disneyland, for instance, launched a virtual queue system to encourage physical distancing with the Disney Standby Pass</li> <li>– Various Italian museums have implemented electronic devices worn as lanyards which vibrate and light up if guests are standing too close to one another</li> </ul> </li> <li>• Other options to support crowd management include timed digital ticketing, dynamic pricing linked to demand, as well as mobile products such as GetYourGuide's "Beat the Crowds" which collects wait times and occupancy levels in real time through sensors and uses this data to forecast waiting times, and warns customers of which areas to avoid</li> </ul>

### Suggested next steps – (iii) Green Crime and Human Trafficking

Green Crime and Human Trafficking (next steps)	
a. Ban wildlife trafficking	<ul style="list-style-type: none"> <li>• Governments should enhance surveillance and tracking of wildlife traffickers, ultimately aiming to impose a ban on the cruel practice</li> <li>• COVID-19 has, however, been a wake-up call to governments around the world. According to the US CDC, 75% of new or emerging diseases infecting people originate in animals <ul style="list-style-type: none"> <li>– China has fast-tracked a ban on the trade and consumption of wildlife</li> <li>– Australia has called on world leaders to ban wildlife markets and grant WHO broad powers to investigate a disease outbreak</li> </ul> </li> <li>• Partnerships with both non-profits and businesses should be struck to jointly promote approaches to address wildlife trafficking</li> </ul>

	<ul style="list-style-type: none"> <li>• While stringent policies are needed, businesses and NGOs are key to reporting and enforcing trafficking restrictions on the ground</li> <li>• In this context, the global initiative to “End Wildlife Crime” was created to encourage States to fill serious gaps in international law by advocating and supporting the creation of a new global agreement on wildlife crime and amend existing wildlife trade laws to include public health and animal health in the decision-making</li> </ul>
b. Improve conservation monitoring and awareness	<ul style="list-style-type: none"> <li>• With conservation depending so crucially on tourism in many destinations, by monitoring and quantify this contribution the sector can capitalize on its conservation efforts</li> <li>• Some reserves are turning to virtual conservation to inspire, connect travellers to important wildlife conservation issues, and even create platforms to fund relief for the local communities and protected wildlife</li> <li>• Example: The Nature Conservancy is raising money for cash-strapped parks, conservancies and private reserves in Africa to help pay for rangers and guards; companies like Brave Africa launched a crowdsourced fundraising campaign in partnership with the Victoria Falls Anti-Poaching Unit</li> </ul>
c. Further legislate against human trafficking	<ul style="list-style-type: none"> <li>• Governments have a critical role to play in enacting and enforcing legislation recognising human trafficking as a crime throughout supply chains, and developing the resources and support needed, including national hotlines. These are particularly significant in case of reporting sexual and labour exploitation of children and child trafficking committed in tourism facilities and services, which can be misused to commit these nefarious crimes <ul style="list-style-type: none"> <li>– Example: Egypt’s Ministry of Tourism conducted inspections of hotels to ensure compliance with regulations to prohibit the entry of children vulnerable to sex or labour trafficking</li> </ul> </li> <li>• Enhanced support is also needed to provide victims of human trafficking with assistance, employability, training and opportunities for reintegration into the workforce</li> </ul>

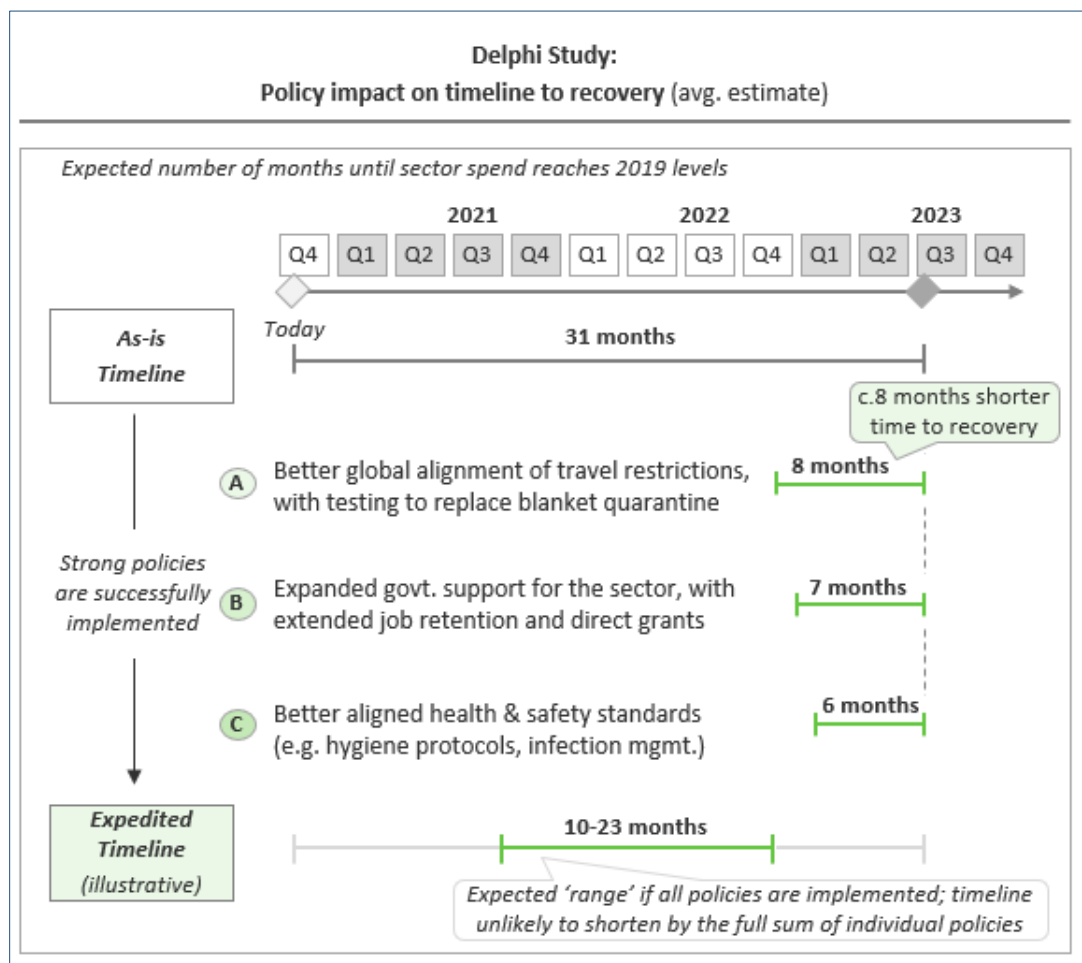
## Chapter 3: Outlook

As the travel & tourism sector faces the second wave in COVID-19 infections and possibly yet another serious disruption of international travel, this manifesto outlines policies that can create the fundamentals for a medium-term inclusive recovery, whilst keeping a broader perspective on ‘Smarter’ and ‘Greener’ Travel & Tourism developments.

As indicated in Chapter 1, participants of the Delphi study expect a steep decline in travel & tourism spend in full-year 2020, with a **long-winded and difficult recovery**. The travel & tourism sector is expected to recover only by Q3 2023.

However, industry leaders who participated in the Delphi study also voiced their expectation that **policy areas discussed in this manifesto** have the potential to **significantly shorten the timeline to recovery**:

- **Better global alignment of travel restrictions**, with testing to replace blanket quarantine rules, if implemented swiftly, could shorten the timeline by up to **8 months**
- **Expanded government support** for the travel & tourism sector, with extended and improved job retention scheme and grants to bridge liquidity shortages: **up to 7 months**
- **Better aligned health & safety standards**, up to **6 months**



It is crucial to emphasise participants' expectations towards **alignment and harmonisation** of travel restrictions and standards, and continued strong government support in these difficult times:

- *"This virus is here to stay and without adequate testing or a vaccine, consumers will not travel to the levels they did before"; "much depends on the policies of Government around the World, the continuation or not of travel restrictions. Testing to replace blanket quarantine rules would be the most helpful action that can be taken"*
- *"Improved support for the sector is essential for recovery"*
- *"Cooperation and collaboration will be key for stronger and sustainable recovery. Alignment and/or harmonization of standards and actions will assist in the overall recovery"*
- *"The projected time for recovery will strongly depend on collective action to revive the travel and tourism sectors, as well as other key productive industries. With many countries undergoing a second wave, with uncertainty as to further waves, [this might all be] an optimistic forecast. Nevertheless, optimism is key during these moments"*

Panellists of the **UNWTO, WTTC and WTM Ministers' Summit** have also struck an overall slightly more optimistic tone: While the travel & tourism sector is undeniably facing its biggest crisis in decades, most panellists see a large amount of pent-up demand, which – if the right learnings from previous crises can be applied – could lead to a quicker sector recovery than currently forecast. Global cooperation between governments and the private sector will be crucial, and all panellists agreed on the importance of building back better, for a more sustainable, resilient and inclusive travel industry.

## Appendix

### Main sources used for the document

(by organisation, in alphabetic order)

- EU Commission Council Proposal for a Coordinated Approach to the Restriction of Free Movement (4<sup>th</sup> September 2020)  
[https://ec.europa.eu/info/sites/info/files/council-proposal-coordinated-approach-restriction-movement\\_en.pdf](https://ec.europa.eu/info/sites/info/files/council-proposal-coordinated-approach-restriction-movement_en.pdf)
- ICAO Public Health Corridors (11<sup>th</sup> May 2020)  
<https://tiaca.org/wp-content/uploads/2020/05/ICAO-Update-05112020.pdf>
- UNWTO and ERBD partner to boost tourism recovery  
<https://www.unwto.org/news/erbd-and-unwto-partner-to-boost-tourism-recovery>
- UNWTO Global Guidelines to Restart Tourism (28<sup>th</sup> May 2020)  
<https://webunwto.s3.eu-west-1.amazonaws.com/s3fs-public/2020-05/UNWTO-Global-Guidelines-to-Restart-Tourism.pdf>
- UNWTO Global Tourism Dashboard - COVID-19 Measures to Support Travel and Tourism  
<https://www.unwto.org/covid-19-measures-to-support-travel-tourism>
- UNWTO Briefing Note 1: How are countries supporting tourism recovery? (June 2020)  
<https://www.e-unwto.org/doi/epdf/10.18111/9789284421893>
- UNWTO to harness the power of AI to link tourism workers with jobs (1<sup>st</sup> October 2020)  
<https://www.unwto.org/news/unwto-to-harness-the-power-of-ai-to-link-tourism-workers-with-jobs>
- UNWTO Healing Solutions Tourism Challenge  
<https://www.unwto.org/healing-solutions-tourism-challenge>
- UNWTO One Planet Vision for a responsible recovery of the tourism sector (June 2020)  
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- UNWTO World Tourism Barometer and Statistical Annex (October 2020)  
<https://www.e-unwto.org/doi/10.18111/wtobarometereng.2020.18.1.6>
- WTTC and Oliver Wyman, 'To Recovery and Beyond' (27<sup>th</sup> September 2020)  
<https://wtcc.org/Research/To-Recovery-Beyond>
- WTTC Safe and Seamless Traveller Journey Initiative  
<https://wtcc.org/Initiatives/Security-Travel-Facilitation>
- WTTC 'Safe Travels' Protocols; various reports available for download  
<https://wtcc.org/COVID-19/Safe-Travels-Global-Protocols-Stamp>
- WTTC Letter to the G7 (14<sup>th</sup> August 2020)  
<https://wtcc.org/COVID-19/Government-Hub/Global-coordination-to-save-the-sector>
- WTTC 100 Million Jobs Recovery Plan  
<https://wtcc.org/COVID-19/G20-Recovery-Plan> (7<sup>th</sup> October 2020)
- WTTC Call for Air Corridors Between Key Global Cities (8<sup>th</sup> September 2020)  
<https://wtcc.org/Portals/0/Documents/Press%20Releases/WTTC%20calls%20for%20air%20corridors%20between%20key%20global%20cities.pdf?ver=2020-09-08-181145-267>
- WTTC Government Hub  
<https://wtcc.org/COVID-19/Government-Hub>