



**COVID-19 RECOVERY
STRATEGIES FOR NATIONAL
TOURISM ORGANISATIONS**

**EUROPEAN
TRAVEL
COMMISSION**

HANDBOOK ON COVID-19 RECOVERY STRATEGIES FOR NATIONAL TOURISM ORGANISATIONS

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the European Travel Commission (ETC)
by TOPOSOPHY Ltd.

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Handbook on COVID-19 Recovery Strategies for NTOs

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FOREWORD

The level of the disruption caused by the COVID-19 pandemic has been far more severe than previous crises (e.g., SARS or the 2008-09 financial crisis) and has brought fundamental changes to the travel industry worldwide. The global health crisis has left governments across Europe facing a public health emergency, struggling to support their economies, and has taken a severe toll on the tourism sector. Global international travel is expected to decline by over 50% in 2020, with 2019 levels not being achieved until 2023 according to Tourism Economics' latest forecasts. The fundamental nature of tourism has changed, and the recovery of the sector is expected to be as gradual as the re-opening of different economies.

The expectation that pre-crisis levels of tourism demand will not bounce back before 2023 also provides tourism destinations with an opportunity to reshape the industry towards one that is more sustainable, more innovative and that equally benefits travellers, local communities, the environment and local economies. The COVID-19 crisis emerged as a universal challenge like no other and thus global support, collaboration and understanding are required to mitigate the social and economic impact of the pandemic.

With the aim of supporting destinations to rebuild the European tourism sector, the European Travel Commission (ETC) commissioned a Handbook that explores mitigation and recovery strategies deployed by NTOs across Europe during the pandemic, with a focus on sustainable tourism practices.

The aim of the Handbook is to provide NTOs with strategic recommendations to follow the path to rebuild both the tourism industry and travel confidence and ultimately support the creation of a new tourism ecosystem. ETC trusts that this Handbook will foster knowledge sharing among destinations, strengthen Europe's approach for recovery and pave the way towards a more sustainable and resilient tourism sector.

Peter de Wilde
President
European Travel Commission (ETC)



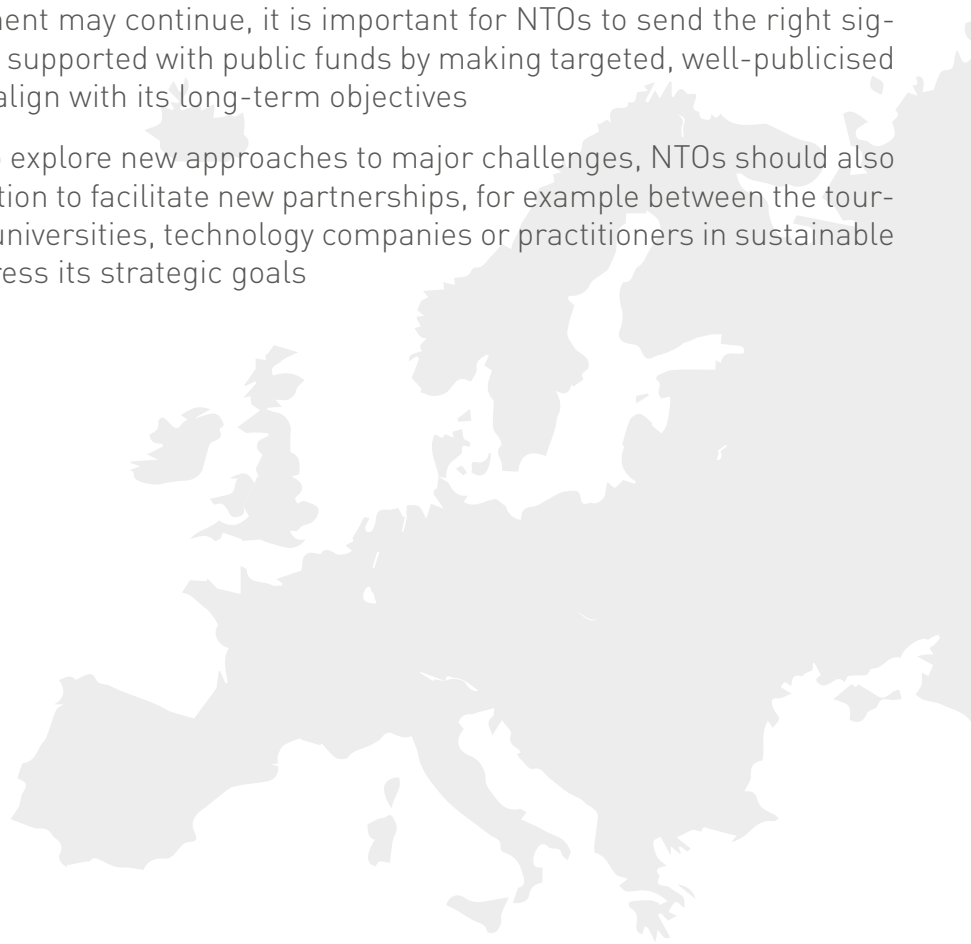
EXECUTIVE SUMMARY

- As the first half of 2020 has progressed, NTOs expectations about the impact of COVID-19 on the tourism performance in their countries have become more pessimistic. Given that the restart to tourism has been uneven, NTOs highlighted that it was still too early to make accurate predictions for the whole year, and that their main areas of concern have been related to the rising unemployment levels in the tourism sector and the solvency of businesses in the sector
- During the response phase (approximately March to June 2020), NTOs typically played a key role in communicating news about central government support measures and have worked intensely on recovery planning, to help the sector reopen successfully and to stimulate demand
- During the recovery phase (approximately from July 2020 onwards), NTOs have focused primarily on stimulating demand from the domestic and neighbouring markets, supporting tourism businesses in adapting to new social distancing and hygiene measures, promoting products and experiences associated with nature, health & wellbeing, outdoor activities and supporting DMOs with strategic guidance and funding in meeting the needs of local businesses and local communities
- COVID-19 has caused changes in the way that NTOs are perceived, with diverse stakeholder groups relying on the NTO for data, insights, guidance and an amplifier effect to spread key messages. NTOs have had to adapt to the challenging situation caused by lockdowns being imposed, with staff often switching roles at short notice to focus on delivering business support advice or switching from international to domestic marketing. As with many organisations, the process of digitalisation has accelerated within NTOs.
- Some changes in consumer travel preferences have already become evident in 2020. These include: greater concern around personal wellbeing, air quality and humans' impact on the environment; a strong preference for travel domestically; a desire to spend time in open spaces, with fresh air, and private accommodation, and; a preference for active holidays, involving fitness activities or following hiking and cycling routes. Many NTOs expressed a hope that these patterns of behaviour would become more permanent.



RECOMMENDATIONS

- Beyond the urgent requirement to restore livelihoods, and ensure that travellers can move freely and safely, the coming months present a potentially unique opportunity to reset tourism strategies and funding models and put tourism in Europe on a more sustainable path. **For the European Travel Commission, the goal is for Europe's NTOs to lead in developing a new sustainable tourism ecosystem** or, expressed in different terms, to make Europe the most sustainable destination in the world
- NTOs should start by developing a vision for the sustainable future of tourism in their country that is based on wide-ranging consultation with communities, businesses of all sizes and professionals from other sectors, and then ensure that it is widely understood
- The One Planet Vision for a Responsible Recovery of the Tourism Sector (published by UNWTO, June 2020) provides a useful framework for building a vision, and a roadmap for recovery
- If managed well, the coming months could present a unique opportunity for NTOs to assume a new, refreshed role, leading the transition of the tourism sector:
 - To a low-carbon economy
 - To community-based renewal of destinations, and;
 - In adjusting to shifting consumer values in a post-COVID-19 world
- NTOs can also set an example to the wider tourism sector by demonstrating what projects and programmes from this initiative, the NTO will and will not support with its resources. While some aspects of mass tourism development may continue, it is important for NTOs to send the right signals about what will and will not be supported with public funds by making targeted, well-publicised investments in specific areas that align with its long-term objectives
- Given that many people are keen to explore new approaches to major challenges, NTOs should also take advantage of the current situation to facilitate new partnerships, for example between the tourism industry and the country's top universities, technology companies or practitioners in sustainable business practices in order to address its strategic goals



CHAPTER 1



INTRODUCTION & OVERVIEW



1. INTRODUCTION & OVERVIEW

1.1 ABOUT THE HANDBOOK

As businesses and communities rebuild following the pandemic, it will be vital to ensure that this recovery takes place in a way that reduces the negative impacts of tourism on the environment and on local communities, and provides a more balanced, equitable contribution to economic growth. With this in mind, the strategic guidelines in this Handbook focus on sustainable tourism practices that will ultimately support the creation of a new tourism ecosystem in Europe.

NTOs now have a crucial role to play in guiding their national tourism sectors in preparing for recovery, and in building confidence among consumers to travel again. The COVID-19 pandemic has seen NTOs forging coalitions with public and private partners, setting up support programmes and engaging with tourism businesses on a scale never seen before. Looking ahead, there is an opportunity to capture this momentum in order to ensure that the brand promise of 'diverse abundance of landscapes, communities, cultures and heritage' can be enjoyed by visitors today, and for generations to come. At the same time, in preparing this Handbook, it is recognised that NTOs across Europe are at different stages in their journey towards developing a sustainable tourism ecosystem in their respective countries. Therefore, rather than set out a prescriptive action plan or 'one-size-fits-all' strategy for recovery, this Handbook sets out strategic guidelines, with guidance on which lines of action to prioritise most urgently (see Chapter 4).

Furthermore, it is important to note that at the time of preparation of this report (July 2020), tourism in Europe was at the very first stages of recovery with borders gradually reopening, and localised lockdowns being imposed to control localised outbreaks of COVID-19. Tourism businesses were facing the challenges of operating while complying with strict public health measures. This is a highly dynamic situation, with governments continually updating their policies in response to the virus and the needs of the tourism sector. The research presented in this report therefore represents a snapshot of measures taken to date. The European Travel Commission will continue to share further guidelines and cases of best practice as they become available.



1.2 OBJECTIVES OF THE STUDY

The preparation of this report was based on primary and secondary research. A full description of the methodology used is provided in Annex 1 of this report. The aim of this research was to understand:

- Actions carried out by European NTOs to monitor and mitigate the impact of the COVID-19 pandemic.
- Actions taken by European NTOs to support their respective national tourism industry and ensure the successful recovery of domestic and international tourism.
- The role that sustainable tourism practices are playing as a key factor in determining the pace and characteristics of recovery.
- Good examples of politics and practices taken at a national level that could be implemented at pan-European level in order to shape a more sustainable tourism ecosystem.

As a result of this research, it is hoped that this Handbook will contribute to a wider knowledge sharing among ETC members, the overall strengthening of Europe's approach to tourism recovery and ultimately, a more sustainable and resilient tourism ecosystem.



CHAPTER 2



**COVID-19
RESPONSE AND RECOVERY
MEASURES**



2. COVID-19 RESPONSE AND RECOVERY MEASURES

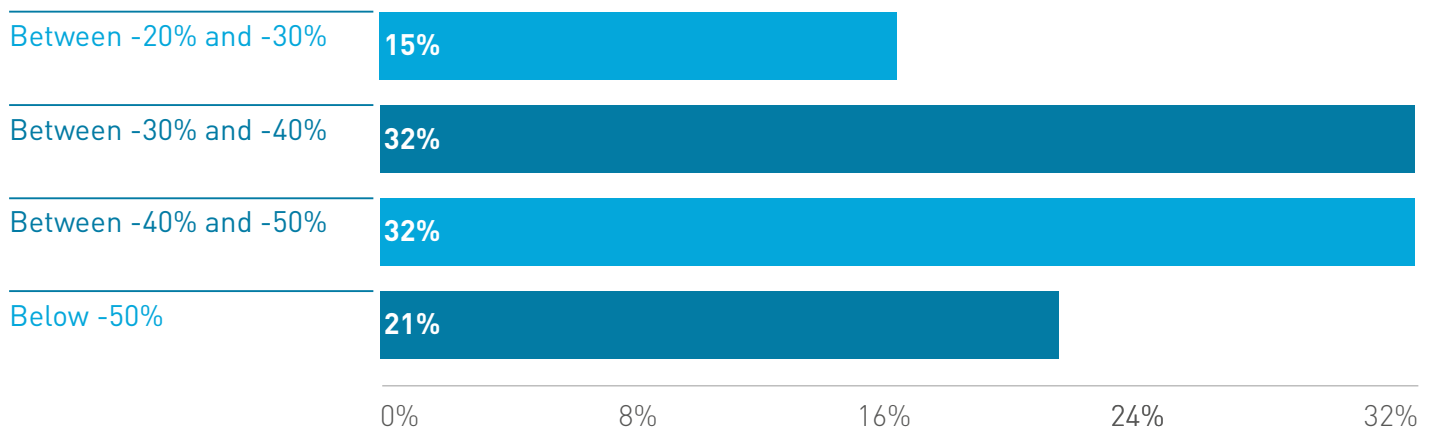
The following Chapter presents an outline of the measures carried out by NTOs to monitor and alleviate the impact of the COVID-19 pandemic, followed by the measures taken to support their tourism sectors through recovery and stimulate consumer demand in both domestic and international markets. The insights in this chapter are taken from three waves of a survey carried out among ETC members, as well as in-depth interviews with four CEOs of European NTOs.

2.1 EXPECTED IMPACT OF THE CRISIS ON DESTINATION PERFORMANCE

In order to set the scene for the response and recovery measures taken, NTOs were asked in successive waves of a survey (taken in April, May and July 2020) how their destination was expected to perform, taking into account the whole of 2020.

The first two waves of surveys show that the initial outlooks of participating NTOs were already pessimistic. The first one, launched in April, indicated that the majority of destination authorities expect a decline of below -20%, with some NTOs anticipating a drop in visits of more than -50%. However, the second and third survey, launched in May and July, respectively, showed that as the year has progressed, NTOs expectations have become more pessimistic. In both surveys, most of the respondents are expecting a decline of between -30% and -40%. According to the latest edition of the European Tourism Trends and Prospects Report (Q2 2020) issued by ETC and Tourism Economics, the expected decline in European tourism for 2020 is 54%.¹ Nevertheless, NTOs highlighted that it was still too early to make accurate predictions for the whole year, and that their main areas of concern have been related to the rising unemployment levels in the tourism sector and the solvency of businesses in the sector.

Figure 1: NTOs' expectations regarding the overall tourism performance of their destination in 2020 (Wave 3)



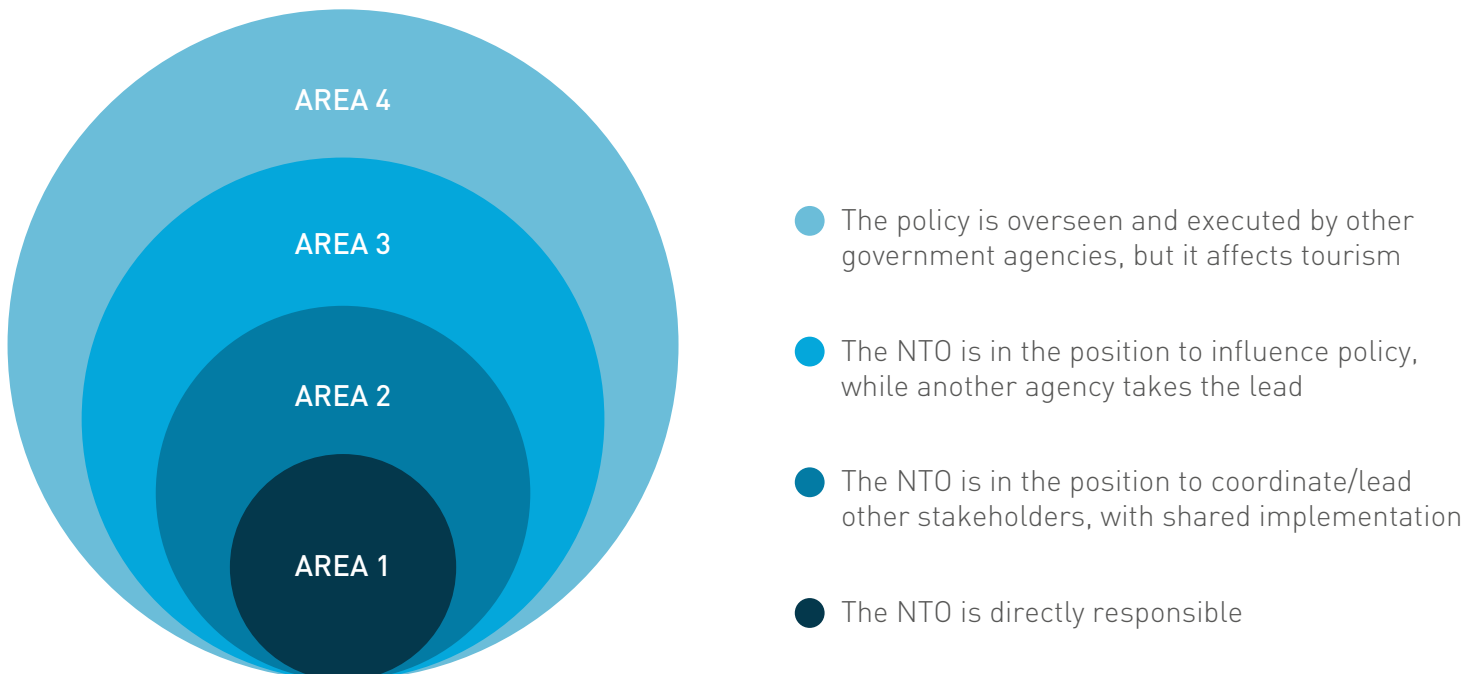


2.2. MAPPING RESPONSE MEASURES INTRODUCED BETWEEN MARCH-JUNE 2020

Given that tourism has been one of the most seriously affected sectors in national economies across Europe, the responses to it have been multi-faceted and implemented by a range of government bodies. The three waves of primary research carried out in advance of this report (April, May and July 2020) asked about the broad range of measures that had been taken by national governments to respond to the impact of COVID-19 on the tourism sector. The measures reported by NTOs were highly varied, with some falling under the NTO's direct responsibility, and others implemented by other government departments.

In mapping both the **response** and **recovery** measures taken to respond to the impact of COVID-19 on the tourism sector, it is important to bear in mind firstly that NTOs' scope of responsibility varies from country to country and secondly, that the characteristics of the organisation (solely public or public-private) vary, as well as the organisational chart and the resources dedicated to individual areas of policy delivery. As the CEO interviews for this report have demonstrated, the COVID-19 crisis has required NTOs to re-purpose teams and internal resources very quickly. As the crisis has called for a coordinated government response, NTOs' capacity to influence policy has generally increased too.

Figure 2: Areas of NTOs' responsibility





During the response phase (defined approximately as the period from March to June 2020), central governments prioritised policies focused on liquidity support, reducing the fiscal burden on businesses (e.g. tax breaks, reductions in VAT, extended periods for tax payments), loan guarantees to companies, or support schemes for affected employees. Referring to the chart above, these policies typically fall into Area 3, with NTOs playing a key role in communicating news about these support measures through their own communication channels. During this phase, NTOs have also prioritised tourism sector-specific response and recovery planning, to help the sector reopen successfully and to stimulate demand.

The table below shows a summary overview of the **response measures** taken to mitigate the impact of the COVID-19 crisis on the tourism sector, divided into two broad groups, based on the 'scope of responsibility' table above. (NB: Specific areas of responsibility vary between NTOs).

Table 1: Overview of response measures



RESPONSE MEASURES: NTOs directly responsible for implementation and/ or coordination (Areas 1 and 2)	RESPONSE MEASURES: NTO is in a position to influence / measure effects on the tourism sector (Areas 3 and 4)
<ul style="list-style-type: none"> • Set up COVID-19 tourism crisis response group • Provide information to tourism businesses about support schemes online and with direct business support hotline • Support tourism sector with representation to central government, relaying specific requests for support • Waive or postpone collection of fees (e.g. membership fees or operator licences) • Liaison between the government and the tourism sector • PR and communication recovery planning (market monitoring and prioritisation) • Monitor impact of crisis on tourism businesses (e.g. with B2B survey) • Monitor impact of the crisis on consumer sentiment in key markets (e.g. consumer confidence surveys, travel search patterns, media coverage shaping consumer perceptions of destination country) • Relay official information to visitors about public health measures through NTOs' social media and NTOs' websites (translated into languages of key markets) • Roll out inspirational campaigns e.g. 'Dream now, visit later' • Support visitors needing to be repatriated (e.g. arrange emergency accommodation for passengers awaiting repatriation, facilitating repatriation flights, cooperation with embassies and consulates) • Tourism infrastructure planning and investment (e.g. providing finance for renovating and restoring hotels and attractions or fast-tracking planned transport and hotel construction works) • Coordinate national pre-purchase voucher system to support business liquidity • Set up official online training courses for inactive/ furloughed employees 	<ul style="list-style-type: none"> • Fiscal measures to support affected tourism sector employees (e.g. furlough schemes, waived taxes or social security payments) • Fiscal measures to support affected tourism sector businesses (e.g. waived rent collection or business taxes or VAT submission) • Support packages for specific sectors (e.g. airlines, cruises) or individuals (e.g. self-employed guides or artisans) • Reimbursement of fees for cancelled events • Financing for national voucher system with voucher redemption guarantee against business failure • Reconstruction funds for specific infrastructure upgrades • Skills training programmes • Transport and accommodation provision for visitors in need of repatriation



2.3. CHALLENGES EXPECTED IN THE SHORT-TERM (NEXT 6-12 MONTHS)

As noted in the previous chapter, the immediate concern of NTOs following the COVID-19 impact on the tourism industry was focused on the financial health of companies and the effect this unprecedented crisis could have on jobs. Additional challenges related to the decline in tourist visits or the loss of revenue were also recognised at an early stage, however, NTOs have indicated that avoiding bankruptcies and mass unemployment in the tourism sector are still their main areas of concern.

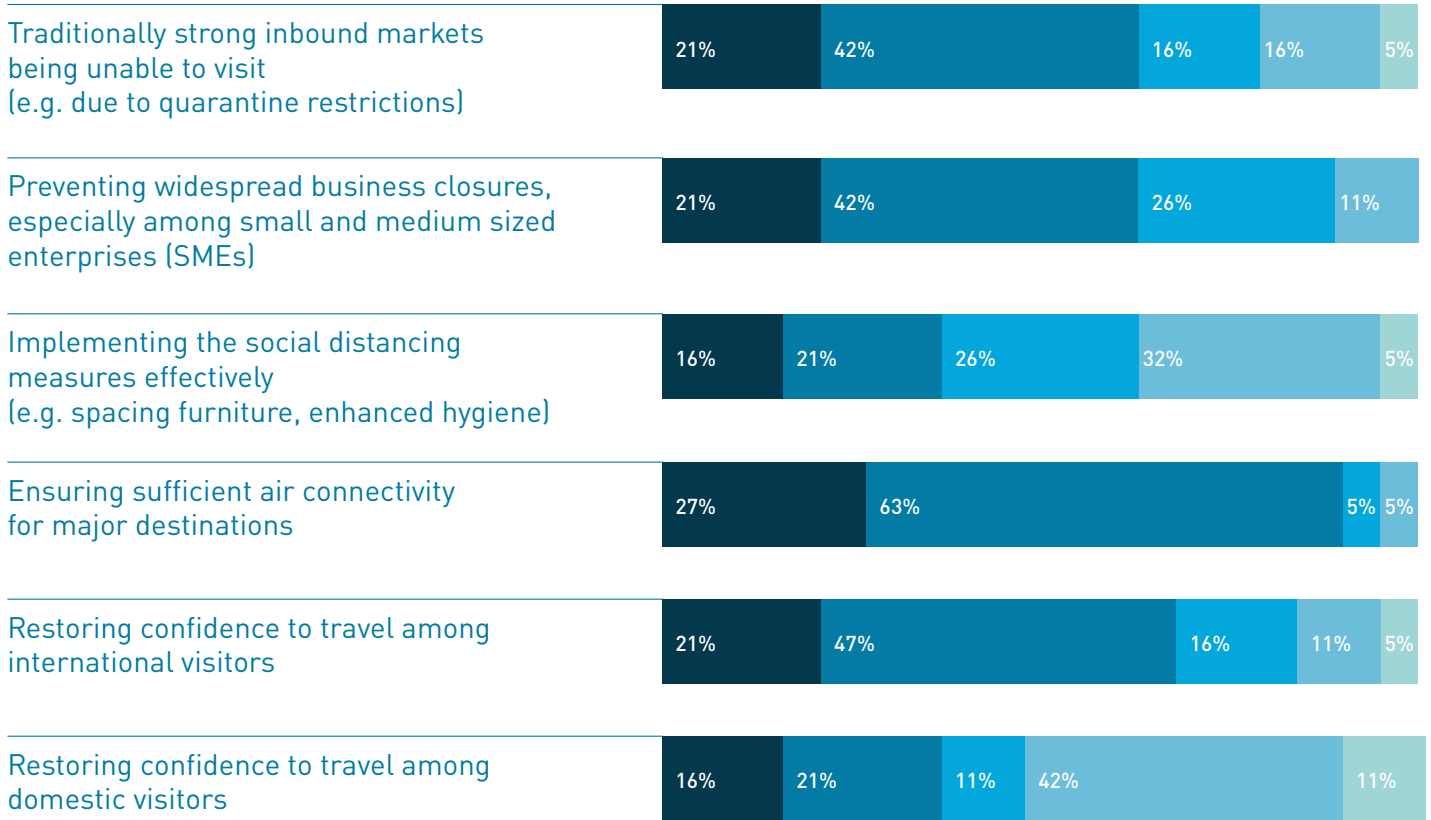
It is important to keep in mind that tourism recovery in Europe is still at a very early stage and that tourism demand is subject to sudden changes in public health measures. Therefore, new challenges may rapidly emerge in the coming months (such as an outbreak traced to a specific destination), while others (such as weak demand from long-haul markets) may remain present for over a year. According to the latest wave of the NTO survey (July 2020), the main challenges that NTOs are expecting to face within the next 6-12 months include:

- Maintaining liquidity and viability of tourism businesses, and preventing closures
- Significant decline in tourist visits
- Limiting the loss of jobs and skills from the tourism sector
- Weak consumer confidence and sentiment to travel in domestic and international markets
- Maximising demand in the domestic market
- Ensuring that tourism businesses can adapt to social distancing requirements (e.g. through purchase and installation of additional hygiene equipment or installing online booking systems)
- Lack of air capacity due to suspension of air routes
- Fall in demand for specific market segments or products (e.g. business travel or cruises)
- Reacting to the effects of possible successive waves of the coronavirus





Figure 3: How likely is it that the following issues could be especially challenging for your destination during the next 6 months?



● Extremely Likely

● Likely

● Neutral

● Unlikely

● Extremely Unlikely



2.4. MAPPING NTOs' COVID-19 RECOVERY MEASURES

When asked about measures taken to stimulate tourism recovery, in the first and second wave of the NTO survey, NTOs mostly expected to focus on business support, developing new marketing campaigns or predicting future demand. However, the latest wave of the survey shows a significant change in NTOs' perception of the importance of the domestic market, possibly due to weak international demand, particularly from long-haul markets. NTOs' approach to the domestic market has traditionally been mixed, with some organisations never responsible for domestic marketing before, and others perceiving the domestic market demand as a means to reduce seasonality. However, stimulating demand in the domestic market has for many NTOs now become a priority, particularly where the population size or level of disposable income makes this a viable approach. Additionally, countries such as Poland, Croatia and Slovenia have already adopted frameworks to stimulate domestic demand with the help of national voucher systems to encourage citizens of these countries to take domestic overnight trips, eat at restaurants or exchange the vouchers for other tourism-related activities (see case studies below).²

Neighbouring markets have also been clearly identified as an important source of tourism spending, in the absence of more substantial international consumer demand. This came as a natural consequence of the establishment of the first travel bubbles³ in May 2020, such as the 'Baltic Bubble' or the agreement signed between Serbia, Greece and Bulgaria. The latest survey results show that encouraging visits from neighbouring countries is now a widespread approach taken by European NTOs.

During the recovery phase, many of the measures featured in 'Areas 3 and 4' in section 2.2 have been adapted and prolonged (for example, tax reductions or waivers, and employee furlough schemes) with the exact nature and extent of the prolongation varying from country to country. In this sense, there has been no clear distinction between the end of the 'response period' and the start of the recovery period. Instead, it is more accurate to state that the prolongation of some measures has meant that one period has flowed into another. Wave 3 of the survey carried out for this report asked NTOs to focus on the measures that their organisations had largely been responsible for. As a result, the table below summarises a range of recovery measures which NTOs have adopted or been able to influence in stimulating demand and supporting the tourism sector through the recovery phase. These measures typically fall into Areas 1 and 2, using the classification shown in section 2.2.



Table 2: Overview of recovery measures



RESPONSE MEASURES:	
NTOs directly responsible for implementation and / or coordination (Areas 1 and 2)	
POLICY AND STRATEGY	<ul style="list-style-type: none"> • Develop a recovery strategy and long-term vision for tourism • Set up and lead a recovery taskforce • Advocate for tourism sector recovery measures as part of overall government stimulus packages • Strengthen relations with regional/local tourism administrations, providing enhanced guidance and updates about recovery planning
TOURISM BUSINESS SUPPORT	<ul style="list-style-type: none"> • Finance and guidance for tourism businesses in adapting to public health and social distancing measures, for example: <ul style="list-style-type: none"> — Purchase and use of personal protective equipment — Purchase and use of contactless + online payment systems — Guidance on spacing and layouts of bars and restaurants — Enhanced cleaning services — Providing a certification programme for hygiene standards in the tourism industry • Set up a digitisation programme to encourage adoption and skills improvements through training schemes and funding • Support for related vulnerable sectors (e.g. self-employed artisans and musicians) • Set up dedicated platforms for virtual events • Implement and promote a national voucher system to stimulate domestic demand
B2B COMMUNICATION & ENGAGEMENT WITH THE TOURISM INDUSTRY	<ul style="list-style-type: none"> • Increase number of businesses receiving NTO trade news updates • Increase frequency and number of channels used to deliver messaging around recovery schemes • Help businesses understand requirements and procedures for adhering to social distancing rules
B2C COMMUNICATIONS	<ul style="list-style-type: none"> • Reassess target markets in light of ease of access, propensity to visit in coming 6-12 months • Promote destinations and experiences that match with consumer sentiment and ease of access (leisure market, outdoor tourism and less crowded destinations) • Provide updated practical advice on 'How to plan your visit' in light of social distancing and hygiene measures • Set up and run domestic marketing campaigns, e.g. around voucher systems for residents
RESEARCH AND INTELLIGENCE	<ul style="list-style-type: none"> • Monitor search demand, booking patterns, consumer sentiment, and emerging trends • Take a new approach to using data to monitor tourism demand, traveller behaviour and the impact of tourism (e.g. use new datasets , perform a holistic analysis using impact indicators for sustainable tourism development) • Develop new key performance indicators for recovery



CASE STUDIES:

Stimulating domestic demand

THE CRO CARD (CROATIA)	A programme to stimulate domestic tourism where companies give their employees a 2,500 HRK (330 EUR) bonus in the form of a voucher, which is exempt from payroll taxes. Participating tourism businesses, such as catering services, hotels or travel agencies are giving CRO Card holders an undefined discount for using the voucher. Important to note is that employers do not order the card, but employees independently choose the bank where they will open an account related to the card and may receive payments from their employer onto the card, as part of their salary, or charge money to it themselves.
HOLIDAY VOUCHER (POLAND)	The Polish Parliament recently approved a plan according to which families will receive an electronic voucher of 112 EUR (per child) to be spent on taking holidays in the country. The idea is to encourage families to travel in Poland and it is estimated that around 18 million children, aged under 18, will benefit from the vouchers.
TOURIST VOUCHERS (SLOVENIA)	Permanent residents of Slovenia who are over the age of 18 will receive a voucher of 200 EUR that can be spent on accommodation, in some cases with breakfast included. In addition, Slovenia provides vouchers of 50 EUR for children under the age of 18. All vouchers will be valid from 19th of June until 31st of December 2020. They may be used by other family members, and are exempt from taxation and may be used in parts.

CASE STUDIES:

Encouraging visitors to book and travel with confidence

CLEAN & SAFE CERTIFICATION (PORTUGAL)	Turismo de Portugal created a “ Clean & Safe ” certificate that recognises companies in the tourism sector that comply with the minimum hygiene and cleaning requirements for the prevention and control of COVID-19. Developed in collaboration with Portugal’s health department, obtaining the certificate requires the implementation of an internal protocol which states that the company is following the necessary hygiene measures in accordance with the established recommendations by the Directorate-General for Health. The certification is free, can be obtained online, and is valid for one year. Random audits will be carried out by Turismo de Portugal.
THE PASSENGER LOCATOR FORM (GREECE)	As of 1st July, travellers visiting Greece have to complete a document indicating their point of departure, the duration of previous stays in other countries, and the address of their stay while in Greece. When submitting the form electronically, travellers will receive a QR code which has to be shown upon entering the country. Depending on the QR code/confirmation, travellers are directed either to the screening area where they will be tested for COVID-19 or to the exit. In the case of being tested, the traveller will have to remain under quarantine for 24 hours until the results are published. Hotels check the QR code upon guest arrival, which indicates if the guest is required to quarantine upon arrival at their accommodation.
AHEAD OF THE CURVE (LATVIA)	The Latvian Investment and Development Agency launched a marketing campaign highlighting the comparative success of Latvia in handling the COVID-19 outbreak. Through short videos, Latvia showcased the innovative solutions that were adopted in the country in order to adapt to the COVID-19 pandemic. These include online education, a home-grown contact tracing app and government agencies that were able to function through remote working. Through these videos, the Latvian authorities hope to inspire visitors to feel safe in visiting Latvia.



In the most recent wave of the NTO survey (July 2020), respondents were asked if their organisation had created a specific COVID-19 recovery plan or strategic vision for COVID-19 recovery in the coming years. Slightly more than 50% of the NTOs that responded had a specific recovery strategy or said that the process of creating one was underway. The following areas were highlighted as areas of focus for NTOs' recovery strategies to date:

- Stimulating demand in the domestic market
- Stimulating demand from neighbouring markets, easily reachable by road
- Supporting tourism businesses in adapting to new social distancing and hygiene measures
- Supporting businesses in sectors that had been particularly affected by public health restrictions or the decline in international visitors, such as the meetings industry, spas and wellness centres,
- Promoting products and experiences associated with nature, health & wellbeing, outdoor activities
- Supporting DMOs with strategic guidance and funding in meeting the needs of local businesses and local communities

NTOs were also asked what products, experiences and local destinations they expected to promote in order to stimulate demand in the remainder of 2020. Their approach can be summarised as:

- Creating inspiration and reassurance to travellers about the extent of open spaces and nature-based activities available in the country
- Commonly promoted experiences including hiking and cycling routes, cultural trails in rural areas, beaches and surf spots, national parks and small villages, and outdoor adventure activities
- Towns, villages and nature spots that are easily accessible by car, allowing flexibility around planning a visit

These experiences would be promoted primarily to consumers in neighbouring countries, often who already had some familiarity with the country and would feel more confident to plan their visit and travel freely without additional assistance. Some NTOs noted that they would start promotional activities only when it made sense to do so (with borders reopened and COVID-19 relatively under control).



2.5. REORGANISATION/RE-PURPOSING NTOS' INTERNAL RESOURCES

In order to respond to the tourism sector's urgent need for support and information, NTOs have had to adapt their own internal procedures, re-assigning teams to respond to specific tasks, often at short notice. Urgent short-term tasks, such as advising finance ministries on support packages and connecting tourism businesses with funding support have taken precedence over long-term planning.

Beyond this, it is important to note that the majority of Europe's NTOs have had to quickly adapt to mass home-working and flexible work schedules, a significant step in itself for public sector organisations. As with many other companies and organisations around the world, this has necessitated a rapid shift to using cloud-based IT systems, virtual meeting software and digitalised internal processes.

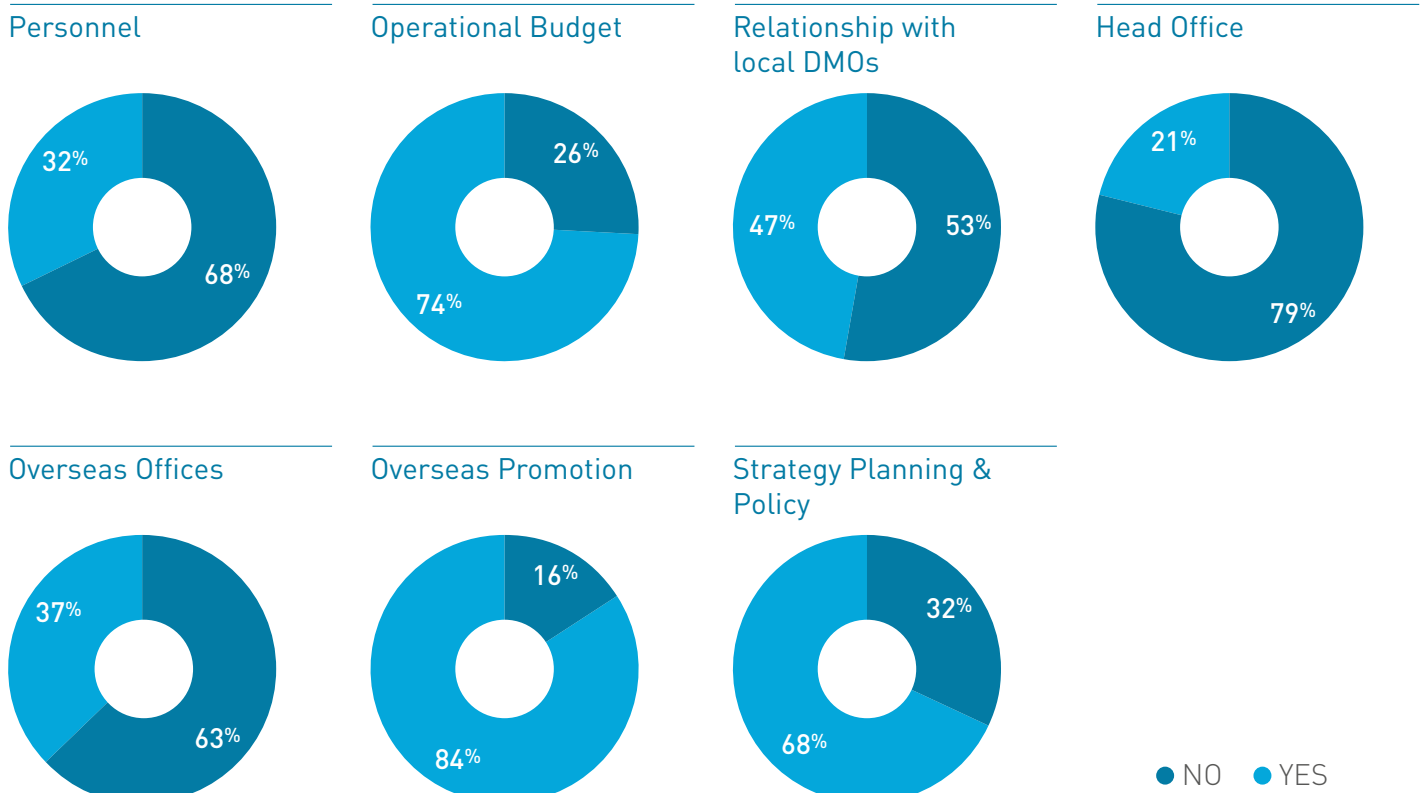
Some organisations have gone further, for example, Turismo de Portugal described how it would now prioritise email over paper communications, and that hotel grading inspections are now carried out via Zoom. Some NTOs have moved into new areas and have rapidly formed new partnerships in order to set up and promote voucher systems to stimulate domestic demand.

In the most recent wave of the NTO survey (July 2020), respondents were asked what significant internal changes had been made to their organisation in response to COVID-19:

Figure 4: Organisational changes made by NTOs as a result of COVID-19



As a result of COVID-19, has your organisation had to make any significant changes to its:





A closer analysis of the qualitative responses given to this question reveals that NTOs expect the biggest changes in their activities to occur in overseas promotion and operational budget, (whether this is due to budget cuts or revised strategic priorities). Despite that, no significant changes are expected in personnel. Furthermore, as highlighted earlier, several organisations have already implied that remote work has become an integral part of their operations and that the importance of departments, such as Research and Insights will increase. This in itself could be an early indication regarding the upcoming changes in NTOs' strategic outlook, where they move away from the promotion-focused perspective and adopt a new role focused on managing the destination and providing insights to local stakeholders. Finally, it is noticeable that a greater proportion of NTOs expect changes to be made with respect to their overseas offices (which could refer to their budget, size or staffing level), while fewer expected changes to these conditions at the NTO's main head office. Beyond these initial changes, the majority of NTOs indicated that they still expect to see major internal changes in the coming months, and these changes will be planned according to evolving demand by both businesses and visitors.





2.6. CEO INTERVIEWS - KEY TAKEAWAYS

Overview

In order to gain a deeper understanding of the impact of COVID-19 on NTOs from an organisation point of view, and to understand how the pandemic may have changed relationships with key stakeholders and their future vision, interviews were carried out with the leaders of four NTOs:

- Luis Araújo, CEO, Turismo de Portugal
- Skarphéðinn Berg Steinarsson, Director General, Icelandic Tourism Board
- Jos Vranken, CEO, Netherlands Board of Tourism and Conventions (NBTC)
- František Reismüller, Director of Foreign Offices and B2B Relations, Czech Tourism (Deputy to CEO)

A full list of questions as well as the full text of each interview is provided in Annex 3.

Seven key takeaways can be drawn from the CEO interviews:

- 1. Prior to the emergence of COVID-19, the main strategic challenges included dealing with rapid tourism growth and the need to spread the impact of tourism more evenly.** Those NTOs with a vision and dedicated strategy around the sustainable development of tourism found their strategy and visions to be very useful assets since they provide a rallying point for the tourism sector, as well as a ready-made framework for recovery planning.
- 2. The impact of COVID-19 on tourism performance for 2020 was expected to be severe, especially for countries (e.g. Iceland) that are particularly reliant on air connectivity and consumer sentiment around short breaks.** All organisations are continually monitoring the external environment and consumer sentiment to detect where demand may come from and how it might be maximised to stimulate tourism demand for a sector facing critical challenges in the coming months.
- 3. Decision-making for NTOs in the coming months relies on a wide range of external factors, which are largely outside of the NTO's control.** Six factors were highlighted by Jos Vranken of the Netherlands Board of Tourism and Conventions and may be applied to NTOs more broadly:
 - a.** The public health measures imposed by our government, i.e. how easy is it to visit?
 - b.** The public health measures imposed by governments in our core markets, i.e. how easy is it for our core markets to leave their country and travel here?
 - c.** What guidelines and protocols will apply to the meetings and conventions market? i.e. how restrictive will they be (e.g. will the number of attendees be limited, or specific floor layouts be required?) How freely will business visitors be able to travel?
 - d.** Practical variables such as available air seat capacity, i.e. how easily can our visitors get here? What routes are available?
 - e.** Overall consumer sentiment in our core markets, i.e. how do consumers feel about travelling to the Netherlands? How do they feel about our COVID-19 response?
 - f.** Are the steps taken towards sustainable recovery in line with our brand and strategy?



According to the CEOs interviewed, these factors highlighted the need for a common approach to harmonising border reopening that was based on transparent data and was also proportionate and reciprocal.

- 4. COVID-19 has caused changes in the way that NTOs are perceived** with groups such as the country's tourism industry, trade associations, and central government each relying on the NTO for data, insights, guidance and an amplifier effect to spread key messages. NTOs' own staff also had to adapt to the challenging situation caused by lockdowns being imposed, often switching roles at short notice to focus on delivering business support advice or switching from international to domestic marketing.
- 5. As with many organisations, the process of digitalisation has accelerated within NTOs.** Digital tools including cloud computing, virtual meeting software and instant messaging had helped to improve staff efficiency, make decisions more quickly and communicate more effectively with external stakeholders.
- 6. Addressing critical short-term issues is the priority, however, there is a widespread hope to return to guiding the tourism sector towards a more responsible model for tourism development.** For this reason, it is essential for NTOs to establish a vision for how this is to happen, in consultation with a wide range of stakeholders. This will help to give hope to businesses that feel lost, demonstrate a clear vision for tourism beyond COVID-19 and provide a practical framework for future action plans.
- 7. International cooperation and fresh thinking are needed now more than ever, to solve the challenges that the tourism sector now faces.** Consumer trends such as a preference for nature-based tourism is unlikely to deliver change by themselves, as consumers may well resume old habits such as bucket-list tourism once the global economy improves and the pandemic is over. For this reason, NTOs will have to work hard with all stakeholders to gather support for their strategic vision and work with public and private sector organisations worldwide to benefit from new ideas and lend their support to growing destinations that need additional help.

CHAPTER 3



SETTING THE SCENE FOR A SUSTAINABLE RECOVERY





3. SETTING THE SCENE FOR A SUSTAINABLE RECOVERY

3.1 PLANNING FOR A SUSTAINABLE RECOVERY: AN OPPORTUNITY EMERGES FROM THE CRISIS

The first half of 2020 has presented Europe's tourism sector unprecedented challenges. The way ahead remains uncertain, and a sustained recovery for the tourism sector in Europe largely depends on the availability of a vaccine for COVID-19, and the disease being brought under control around the world. Some important lessons have already emerged from the COVID-19 pandemic. These include the inextricable links between public health and economic development, public health and the environment, tourism as a key contributor to the prosperity of destinations, as well as our need for leisure and relaxation, as a fundamental aspect of our wellbeing.

The abrupt decline in global travel has also given a foretaste of a world without the possibility of travel, a possibility which is gradually becoming more realistic as climate change accelerates. The decline in tourism arrivals across Europe has also exposed the extent to which some neighbourhoods, towns or regions have become heavily dependent on tourism as a source of revenue, exposing the need for more diversified economies and stronger local supply chains. For some years, the European Travel Commission has championed the need for Europe's tourism sector to embrace a model of tourism development that is environmentally, socially and economically sustainable. Links to resources for further reading on this topic are provided in Annex 4.

Beyond the urgent requirement to restore livelihoods, and ensure that travellers can move freely and safely, the coming months present a potentially unique opportunity to reset tourism strategies and funding models and put tourism in Europe on a more sustainable path. To what extent do Europe's NTOs perceive the COVID-19 pandemic as a 'turning point' for tourism, and a catalyst for developing a more sustainable model of tourism in Europe? This chapter presents the views of European NTOs on their preferred path to tourism recovery.





3.2. COVID-19, SUSTAINABLE TOURISM AND EMERGING TRAVEL TRENDS

The COVID-19 pandemic has changed consumer behaviour around the world in unprecedented ways. Lockdown restrictions, as well as concerns around the economy and personal health have led to many short-term changes in spending behaviour that may become more permanent. Key trends observed by NTOs to date include:

- Greater concern around personal wellbeing, air quality and humans' impact on the environment
- A strong preference for travel domestically, or to neighbouring countries with easy access by car
- A desire to spend time in open spaces, with fresh air, and private accommodation
- A desire to avoid high-density accommodation and activities, or mixing too closely with strangers (e.g. cruises or long-haul flying)
- A preference for active holidays, involving fitness activities or following hiking and cycling routes
- A long-term increase in precautionary savings, as well as falling consumption rates and increasing frugality among consumers, potentially leading to a fall in discretionary leisure spending⁴

Further significant trends that align with the principles of sustainable tourism include:

- A desire for consumers to be seen (through social media images) as safe and responsible, with travel plans scrutinised through the lens of what is safe, rather than what is popular
- A stronger awareness of the impact of COVID-19 on small businesses and the livelihoods of local communities, leading to prioritised spending with SMEs in order to support the community.⁵

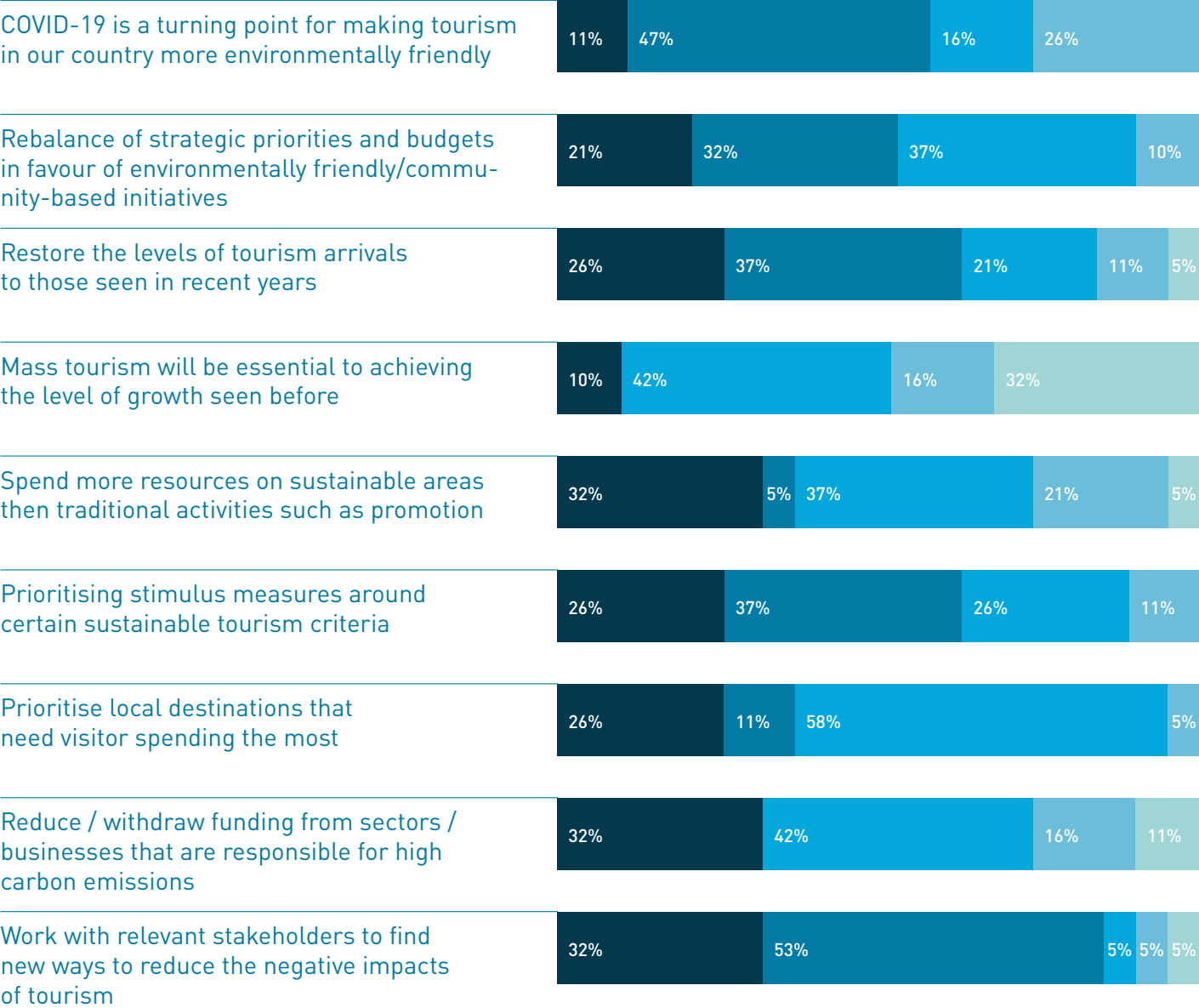
While these trends could provide an important step to adapting business models that are more environmentally and socially sustainable, it should be noted that more than around half of the NTOs responding to the most recent wave of the survey observed that it was still too early to identify patterns of consumer behaviour that are discernible and could become durable. Furthermore, two NTO CEOs interviewed for this report observed that these shifting patterns of consumer preferences alone would not guarantee a shift to adopting a more sustainable model of tourism development in Europe, and that concerted action would be needed across a wide range of areas in order to secure this.



3.3. A SUSTAINABLE RECOVERY FROM COVID-19: NTOs' PRIORITIES NOW AND IN THE FUTURE

NTOs were asked about how the COVID-19 pandemic may have changed their organisation's strategic approach to tourism. They were asked to agree or disagree with a series of statements that related to the imperative of restoring growth (to the levels seen in recent years) versus pursuing a different set of priorities related to the sustainable development of tourism (see Figure 5).

Figure 5: Level of agreement with different strategic approaches to tourism in light of the COVID-19 epidemic



● Completely Agree ● Agree ● Neutral ● Slightly Disagree ● Completely Disagree



Referring to Figure 5, the majority of NTOs surveyed agree that COVID-19 represents a turning point for making tourism in their country more environmentally friendly. There was also a strong willingness (among 85% of respondents) to work with the relevant stakeholders to find new ways to reduce the negative impacts of tourism while 32% indicate that they may reduce or withdraw funding from sectors/businesses with high carbon emissions. There is also scepticism about mass tourism being essential to achieving the levels of growth seen before the crisis (perhaps because it may take some significant time to return), and just over half of respondents indicated that budgets and priorities in the future could be rebalanced in order to pursue more environmentally or socially sustainable initiatives.

At the same time, in possible contradiction to the aims stated above, more than half of NTOs surveyed wished to see a return to the levels of tourism arrivals seen in their country in recent years. This may be due to the strong reliance on tourism for the economies in some of the countries participating in this survey, or based on a desire to see similar levels of tourism arrivals, albeit dispersed more evenly throughout the year, and throughout the country. There was also a strong willingness not to declare at this stage, whether certain local destinations within a country, most in need of visitor spending, may be prioritised in the future, or whether resources would be spent on more sustainability-oriented activities rather than traditional NTO areas such as promotion. This perhaps reflects NTOs' own ongoing uncertainty about the budgetary environment for decision making in the coming years.

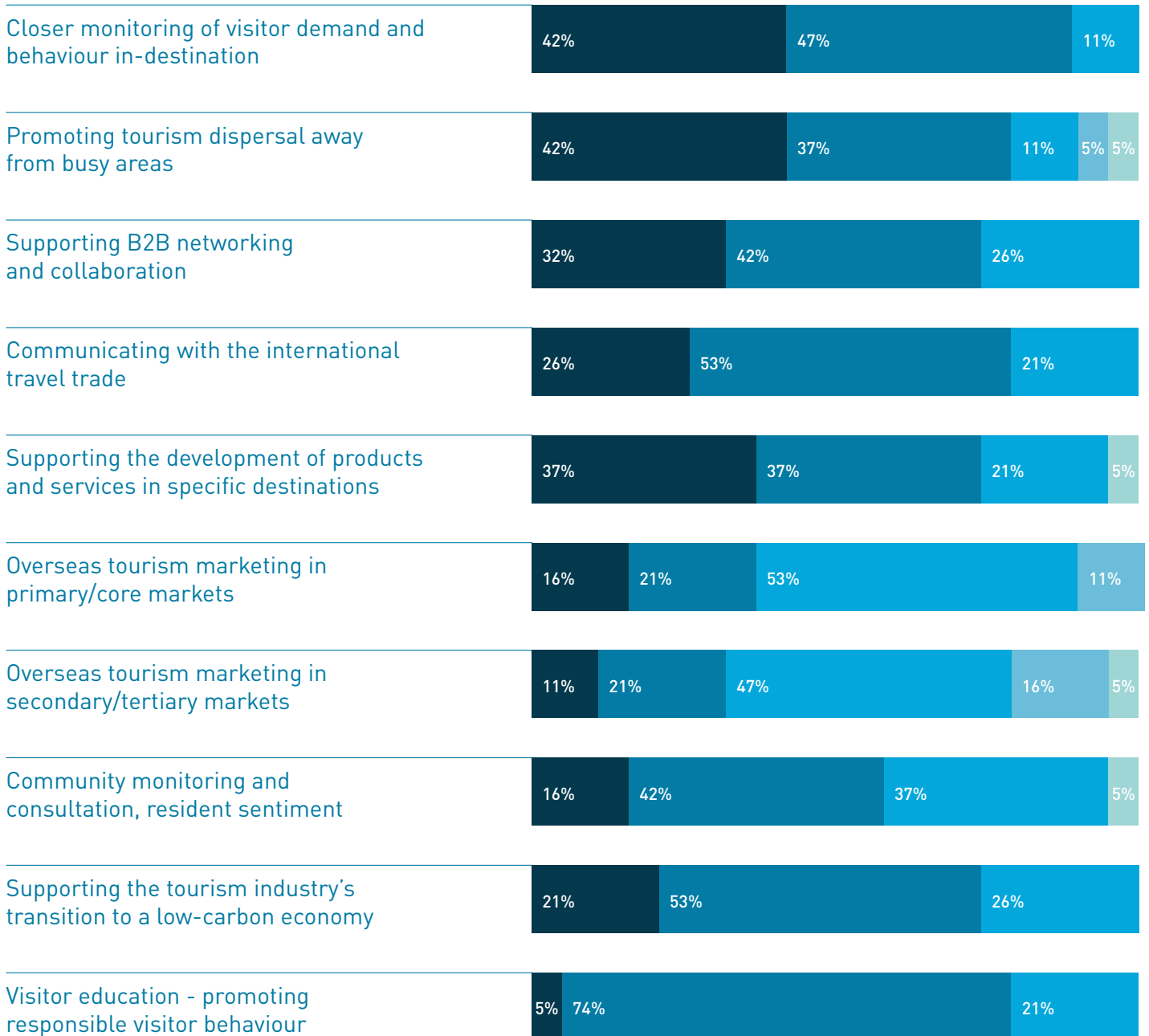




3.4 COVID-19 AND NTOS' LONG-TERM STRATEGIC FOCUS

Looking ahead, NTOs were asked whether COVID-19 may cause their organisation's strategic focus to have increased or decreased in a range of areas, in five years' time.

Figure 6: Areas with expected reduced or increased focus, in five years' time



● Completely Agree
 ● Agree
 ● Neutral
 ● Slightly Disagree
 ● Completely Disagree



Referring to Figure 6, it is interesting to note that the areas that NTOs expect to have increased in importance within the next five years are quite closely aligned with their existing activities and capabilities, in particular those actions that rely on marketing, communication and research. These include monitoring visitor demand and behaviour in the destination, promoting good visitor behaviour and liaising with the international travel trade. Nearly three quarters of NTOs surveyed, however, did expect that their organisation would spend more effort helping the tourism sector to adapt to a low-carbon economy. It is also important to note that the challenge of overtourism that many destinations in Europe were facing in recent years is still a very relevant topic for NTOs. Promoting tourism dispersal away from busy areas is highlighted as an important activity to address. The current unprecedented situation of exceptionally low visitor numbers, and the trend among visitors to visit more remote locations could present a good opportunity to address this issue.

With regard to traditional marketing activities, relatively few (less than 35%) of NTOs surveyed expected to increase promotion in overseas markets, with around 20% expecting to see a reduction in spend to secondary outbound markets. These results are an awareness among the NTOs surveyed that further changes to the scope of their activities is likely to occur in the future, and that more resources are likely to be spent on servicing visitor demand and behaviour in the destination, rather than overseas promotion.





3.5 COVID-19 AND NTOs' LONG-TERM ASPIRATIONS

In an open-ended question, NTO respondents were asked about the outcome of COVID-19 for their destination's prospects, and to state in positive terms, the changes that they hoped to see in their destinations in five years' time. These aspirations are summarised in the following points:

- **A long-term increase in the appeal for domestic vacations among the domestic market**
- **Digital processes (many accelerated by the coronavirus crisis) consolidated in the tourism sector, resulting in improved productivity and competitiveness**
- **A type of 'slow' tourism that helps to improve visitors' physical and mental health**
- **Improved safety and hygiene standards among tourism businesses**
- **An improved brand image for (smaller, lesser known) countries that are perceived to have managed the COVID-19 crisis well**
- **Improved satisfaction among local residents about tourism and its role in destinations, as well as increased awareness among residents about the role that tourism plays in economic prosperity**
- **Increased value among newer markets and neighbouring countries**



CHAPTER 4



PRIORITIES AND STRATEGIC RECOMMENDATIONS





The following sections present strategic recommendations that can guide NTOs in working with all stakeholders in planning the way ahead in the coming years, as well as tools to help prioritise support and investment. Amid profound socio-economic impacts, the COVID-19 epidemic now presents Europe's tourism sector with a unique opportunity to reassess priorities and funding models. As tourism activity gradually restarts across Europe, it is more important than ever for policymakers to be clear on what challenges need to be addressed in order to create a resilient, sustainable tourism sector. **For the European Travel Commission, the goal is for Europe's NTOs to lead in developing a new sustainable tourism ecosystem or, expressed in different terms, to make Europe the most sustainable destination in the world.**

In putting forward these recommendations, it is recognised that there is no one-size-fits all to planning recovery and that each NTO has different levels of funding, human resources and competencies at its disposal. Each country will define its own roadmap for how the goal stated above is to be achieved.

Many of the NTOs surveyed for this report stated that they had already developed or were in the process of developing their own recovery strategy. Some had already published a 'long-term vision' document prior to the arrival of COVID-19 and had found it to be a particularly useful framework for planning recovery. Therefore, the first overarching recommendation is for NTOs to lead in developing a vision for the future of tourism in their country that is based on wide-ranging consultation with communities, businesses of all sizes and professionals from other sectors. At a time when many are feeling lost and worried about the future, such a vision can provide a crucial sense of purpose and direction. Once this vision has been developed, time and effort will have to be spent on ensuring that it is widely understood; by businesses, citizens and visitors.





4.1. GUIDING PRINCIPLES ON DEVELOPING A NEW SUSTAINABLE TOURISM ECOSYSTEM, POST-COVID-19

Since their creation in 2015, the UN Sustainable Development Goals have provided an important framework for articulating the core goals of national and local tourism recovery strategies and remain highly relevant today. Against the backdrop of COVID-19, the One Planet Vision for a Responsible Recovery of the Tourism Sector provides a useful framework for building a vision, and a roadmap for recovery.⁶ In line with the priorities outlined in the UNWTO Global Guidelines to Restart Tourism,⁷ it aims to support the development and implementation of recovery plans which contribute to the UN Sustainable Development Goals (SDGs) and the Paris Agreement.

The vision recommends six lines of action to guide a responsible tourism recovery for people, planet and prosperity, namely:⁸

1. Public health

In particular, to: connect epidemiological indicators with tourism monitoring mechanisms; connect health with sustainability, and; restore trust through transparent and proactive communication on the public health measures put in place.

2. Social inclusion

In particular, to: channel long-term support to SMEs in order to ensure that destinations maintain a diverse and attractive offer; provide targeted support for vulnerable groups such as youth, women, rural and indigenous populations, and; repurpose tourism as a supporter for the community, capitalising on the new services that tourism businesses and creative industries have been providing to destinations in times of crisis.

3. Biodiversity conservation

in particular, to: capture the value of conservation through tourism; support conservation efforts through tourism, and; invest in nature-based solutions for sustainable tourism in order to improve the management of scarce natural resources such as water, and to foster disaster resilience both in urban and natural environments.

4. Climate action

In particular, to: monitor and report CO2 emissions from tourism operations; accelerate the decarbonisation of tourism operations (including through investments to develop low carbon transportation options), and; support the engagement of the tourism sector in adaptation to climate change and carbon removal, through both natural and technological methods.

5. Circular economy

In particular, to: invest in circular economy processes such as reducing and reusing, repairing, refurbishing and recycling; prioritise sustainable food approaches such as local sourcing and reducing food waste, and; addressing plastic waste and pollution.⁹

6. Government and finance

In particular, to: measure beyond the economic impacts of tourism; steer recovery funds towards better tourism (i.e. in achieving the goals presented above), and; enhancing collaboration between key stakeholders along the tourism value chain, internationally and at destination level



4.2. PRIORITISING ACTIONS TO DEVELOP A NEW SUSTAINABLE ECOSYSTEM

Achieving the ambition of a new sustainable ecosystem for tourism in Europe will require careful balancing of priorities now, and in the longer term. This task poses obvious challenges as governments face unprecedented demands to provide economic support across the tourism sector and to restart tourism operations, set against the ongoing risks posed by COVID-19. The following section sets out a framework that can guide NTOs in prioritising actions that emerge from the sustainable recovery strategy process described in section 4.1.

Immediate priorities (2020-2021)

The European Commission communication 'Tourism and Transport in 2020 and Beyond' sets out a co-ordinated framework to 'enable all Europe to benefit from a restful and above all, safe tourism season through 2020-2021'. The Communication is accompanied by a package that provides reassurances and clarity for people and a pathway towards recovery for tourism and transport, to ensure that the EU retains its position as the world leader for sustainable and innovative tourism.¹⁰ The framework consists of four areas of action for Member States to prioritise:

1. Easing restrictions, easing Freedom of Movement and restoring connectivity
2. Harmonising standards and public health measures that will help give travellers confidence
3. Improving business liquidity and providing employee support for businesses facing capacity restrictions
4. Respecting consumer rights (and allowing flexibility around travel plans) and providing clear communication to help consumers to plan and book with confidence

NTOs can play a crucial role in driving forward these areas of action, in particular by coordinating action at national level, providing timely data and research to facilitate decision making and assist the tourism industry with communication support that helps to boost consumer confidence to visit.

What can NTOs do now to prioritise actions and prepare for the longer term?

The measures that NTOs take now will be crucial in preparing both their own organisations and the wider tourism sector for the road ahead. For this reason, NTOs can drive this transition by:

- Developing a vision and roadmap for a sustainable recovery based on the six lines of action set out in Section 4.1 and tailored to the needs and characteristics of their own country and based on widespread consultation. This will help to ensure that decisions taken are rational and follow a logical path based on evidence and a broad consensus
- Facilitate connections between diverse groups of stakeholders. Build on the new partnerships formed during the crisis phase and mobilise support for the new recovery vision and roadmap
- Take advantage of the present situation to launch an initiative promoting educational opportunities, products and visitor experiences that contribute to supporting lines of action 2, 3, 4 and 5 in section 4.1.



- Set an example to the wider tourism sector by demonstrating what projects and programmes from this initiative, the NTO will and will not support with its resources. While some aspects of mass tourism development may continue, it is important for NTOs to send the right signals about what will and will not be supported with public funds by making targeted, well-publicised investments in specific areas that align with its long-term objectives
- Use the present situation in order to embed long term changes, that were accelerated in recent months, such as increased digital working (e.g. virtual meetings, cloud-based computing), and leaving behind programmes and activities that showed a poor return on investment

4.3. STRATEGIC GUIDELINES BY AREA OF OPERATION

The need to ensure tourism's long-term sustainability as well as the immediate needs to support the restoration of livelihoods damaged by COVID-19 will place significant new demands on Europe's national tourism organisations. It will require them to specialise in new areas while pressure on resources will mean some aspects of their current role could be left behind. If managed well, the coming months could present a unique opportunity for NTOs to assume a new, refreshed role, leading the transition of the tourism sector:

- To a low-carbon economy
- To community-based renewal of destinations, and;
- In adjusting to shifting consumer values in a post-COVID-19 world. Performing such a shift may require significant internal changes.

The following strategic guidelines are structured around five key areas which NTOs are generally responsible for, and which provide a starting point for addressing the lines of action described in sections 4.1 and 4.2. These areas of operation are: Policy, Strategy and Partnerships; Research and Intelligence; Branding, Marketing and Promotion; Innovation, and; Business Support and Skills.

Policy, Strategy & Partnerships

Looking ahead, it will be essential to view tourism in policy terms, as a means to an end. It will be important to start by asking "why tourism?" and encourage local and regional tourism leaders to do the same. Asking this question will help to define how tourism can best serve communities and point to the type of visitors that will best serve the country's long-term economic and social objectives.

As explained in section 4.1, tourism strategies should flow from the country's vision for a sustainable tourism recovery, and be based on a collective ambition of what citizens, businesses and local government wish to achieve through encouraging tourism. Therefore, it is recommended that strategies cover key areas including:

- How to target visitors who align most strongly with the destination's ambitions around sustainability (e.g. those with the lowest carbon footprint, most likely to use sustainable modes of transport or are 'conscious spenders' most willing to make a positive impact on the local economy of the places they visit)



- How to manage tourism as it recovers and visitors return: NTOs can lead, by encouraging all regions and municipalities to prepare or update their own local Destination Management Plan (DMP), and provide guidance, insights and recommendations to support the process.
- How to strengthen relationships with local and regional Destination Marketing Organisations and support them to becoming Destination Management and Marketing Organisations (DMMOs), which will be responsible for delivering on DMPs. NTOs can play a key role in supporting them in this task by devising sustainable funding models for local DMMOs and ensuring that they can count on skilled staff with the requisite expertise.
- Supporting DMMOs in developing and implementing mechanisms for ongoing community consultation and monitoring; to ensure that local residents are properly consulted during the preparation of a DMP, and that their views on tourism influence policymaking on a long-term basis.
- Defining the key performance indicators by which success will be measured, moving beyond a purely economic focus to include parameters on the social and environmental impact of tourism, value and length of stay per visitor.

Finally, given that many people are keen to explore new approaches to major challenges, NTOs should also take advantage of the current situation to facilitate new partnerships, for example between the tourism industry and the country's top universities, technology companies or practitioners in sustainable business practices.

CASE STUDY

Croatia's Institute for Tourism, and international NGO the Travel Foundation, have formed a partnership that will support the recovery and longer-term development of tourism in Southeast Europe as travel restrictions begin to ease. The partnership aim is to maximise the value that tourism brings to destination communities while minimising its impact on the environment and natural resources. Together they will offer a programme of support for governments and businesses operating in Croatia and other countries in the region such as Albania, Slovenia, Bulgaria, Bosnia and Herzegovina, and Montenegro. The partnership will support tourism recovery planning using science-based research on tourism's positive and negative impacts, and will build the capacity of destination management organisations, local development organisations and small businesses to recover with a smart and sustainable response to the COVID-19 crisis.



Research and Intelligence

In order to become the 'national champions of tourism transition' described in Section 4.1, this will require NTOs to **build expertise in new areas**, expand their capacity to process data and use it to become more proactive in tackling destination management challenges around the country.

Tourism businesses are currently relying on data to show patterns of expected demand more than ever before and there is an acute need to help inform business decision-making with **reliable insights on consumer behaviour**, and in **learning from the experience of other countries**. Again, NTOs must use the current momentum of the crisis response period (in which businesses sought official, reliable sources of information) **in order to build new partnerships** to gather data and insights and ensure that these insights reach an ever-wider audience. Areas where NTOs will need to expand their research and intelligence capacity will include:

- Understanding interests and motivations of consumers in neighbouring markets, which may be less understood than some long-standing key markets.
- Understanding visitor behaviour while in the destination and the impact of visitors on the environment, local communities and historic sites.
- Building research capability in order to monitor and measure new KPIs based on a sustainable criteria.
- Being able to measure the NTOs' own progress during the year, in order to explain its role and secure future funding.

CASE STUDY

Innovation Norway and the Global Sustainable Tourism Council (GSTC)

For some years Innovation Norway has worked in partnership with the GSTC to carry out training for Norwegian tourism businesses and destinations. Training is currently carried out through online courses which provide the knowledge and resources needed to help improve sustainability practices by tourism across the country. The two organisations are now developing a new portal and toolkit for all destination marketing organisations (DMOs) in Norway based on GSTC criteria. Looking ahead, Innovation Norway aims to create a more balanced scorecard for evaluating tourism impact in the country, and work with other Nordic NTOs to find other KPIs for evaluating the impact of tourism.



Branding, Marketing and Promotion

In the short term, NTOs will have a vital role to play in being a provider of clear, **practical and trustworthy information** on 'how to plan your visit, and travel safely.' At a time when travellers are wary and local people are concerned about the spread of COVID-19, NTOs must also help to encourage **responsible behaviour** among travellers, and respect for the public health measures in place.

In the longer term, branding, marketing and promotion will be an important part of NTOs' toolkits in executing the new vision and strategy described above. In line with the long term trend away from 'destination marketing' towards 'place marketing', **national tourism branding and promotion** is likely to become part of a broader country brand narrative and should be informed by a much broader range of stakeholders from beyond the tourism sector.

As confirmed by the research for this handbook, the current situation also presents a major opportunity to:

- **Reassess all existing online and offline marketing activities**, to ensure that they are consistent with the national strategy on sustainable tourism.
- Emphasise those aspects of the country's tourism offering and identity that are related to **nature, health and wellbeing**, and in doing so, respond to consumers' desire for healthy, outdoor activities. (NB: this aligns strongly with one of the three pillars of the Experience Europe Brand Strategy.¹¹)
- Engage with the domestic market by working with major travel and tour operators to stimulate **domestic demand** and build loyalty for the longer term. It will also be essential to attract travellers who take sustainability seriously, while encouraging sustainable practices to existing visitors.
- Nurture a long-term relationship with young, climate-conscious **Generation Z travellers** from domestic and neighbouring markets, which could pay dividends in transitioning to a sustainable tourism ecosystem.¹²

CASE STUDY

'Green&Safe' Toolkit - Part of Slovenia's commitment to responsible, green and safe tourism

The Slovenian Tourism Board has produced a Manual on Responsible Travel Standards in Slovenian Tourism, as part of its Green&Safe label scheme, which is designed to designate and highlight superior hygiene standards and protocols, and sustainable recommendations for tourist service providers and destinations in the country. Released in July 2020, the Manual provides information on:

- Hygiene standards, measures and recommendations of the National Institute of Public Health that are applicable to the tourism industry in Slovenia;
- Opportunities, capitalising on the fact that Slovenia, is already well-established as a green, active destination that promotes tourism for health and wellbeing. It can provide this, at a time when tourists around the world are paying special attention to the choice of safer, customised and boutique tourist accommodations, programmes and experiences;
- Communication tools based on the Green&Safe scheme, with 10 key areas of content that can be used by Slovenian tourism businesses in their communications



Innovation and the use of new technologies

Moving into new areas of policy and solving complex issues such as decarbonising the tourism sector will require considerable **innovation and collaboration among new groups of stakeholders**. As in other areas, NTOs can harness the willingness of business and political leaders to find new solutions and build resilience by facilitating new relationships.

Rather than imposing or managing the process, NTOs can play a key role in **assembling the right groups**, particularly from the academic sector and research and development agencies. **Young people should be engaged as much as possible**, for example through setting up hackathons, school outreach programmes and similar initiatives. Where good solutions are found, NTOs can also **sponsor and promote pilot projects** around the country to show what can be done and spark further innovation.

Following their own national tourism recovery strategy, and the demands of a transition to a sustainable tourism ecosystem, NTOs can help to promote innovation in areas such as:

- Stronger local supplier networks, connecting hotels and restaurants to 'homegrown' produce in order to strengthen local supply chains and reduce economic leakage from each destination
- Implementing nature-based solutions such as rewilding or incorporating nature-based features into buildings in order to capture carbon from the atmosphere
- Finding innovative solutions to adapting to social distancing measures in the tourism industry (e.g. wristband that monitor social distancing, smart rings detecting infection before symptoms arise, live heatmaps for managing crowd density or managing queues at museums and other tourism attractions)
- Mainstreaming sustainable practices (recycling, circularity of plastics, reduced water use) within tourism businesses (for example [the Plastic Waste Free Initiative Islands Med project](#) led by the International Union for the Conservation of Nature, or the [Kranavatn campaign](#) by the Iceland Tourism Board to brand the country's tap water in order to reduce waste from plastic bottles)
- Social enterprise models that help to support vulnerable local people and tackle local social issues. Cities that have developed such models include Amsterdam, which has developed projects to help visitors give back to neighbourhoods and contribute positively to the city during their visit through its [Untourist Guide](#), while the Mayor of Lisbon has recently proposed to incentivise the [conversion of short-term rental apartments](#) to become affordable housing for key workers.



CASE STUDY

#EuvsVirus Hackathon

In April 2020 the European Commission in cooperation with Member States hosted a pan-European hackathon to connect civil society, innovators, partners and buyers across Europe to develop innovative solutions to coronavirus. The online event created 2,164 multi-disciplinary, multi-nationality teams with innovative solutions which then sparked the development of 2,235 new cross-European partnerships by matching the best 120 teams with 500+ supportive partners from the public and private sectors throughout May. Teams competed to develop COVID-19 related solutions across a range of areas including 'Health & Life, Business Continuity and Social & Political Cohesion. Under this latter area, in the area of 'Sports, Arts and Entertainment', winning ideas included 'Guide your Guide' (a tool enabling virtual visits to museums and cultural sites), Immunisation Pass (a health passport based on blockchain technology) and Art Hub (an online marketplace for art, artists and audiences). By bringing together teams from multiple countries, #EuvsVirus provides a model for a fast, effective way to bring fresh thinking into the tourism sector to solve major challenges.





Business support and education and skills development

The COVID-19 pandemic has in many cases brought NTOs closer to the business community, as businesses have become more reliant on the insights and guidance that NTOs have been providing during the crisis response period. NTOs should capitalise on this momentum and **engage them in the process of creating a new vision for sustainable tourism** in the country, tasking groups to put forward solutions, and testing new approaches. With the strategy complete, NTOs will have to work in the long-term to ensure that it is **widely understood in the business community**, and that there are widespread opportunities to get involved in implementing it.

As central government support measures for businesses are gradually withdrawn, NTOs will have a key role to play in determining which sectors will receive further support, and in which format it will be delivered. It will also be crucial to **set an example by developing stimulus packages that incentivise sustainable practices**, reward businesses that reinvest in their local community and help encourage skilled young people to develop businesses in the tourism sector.

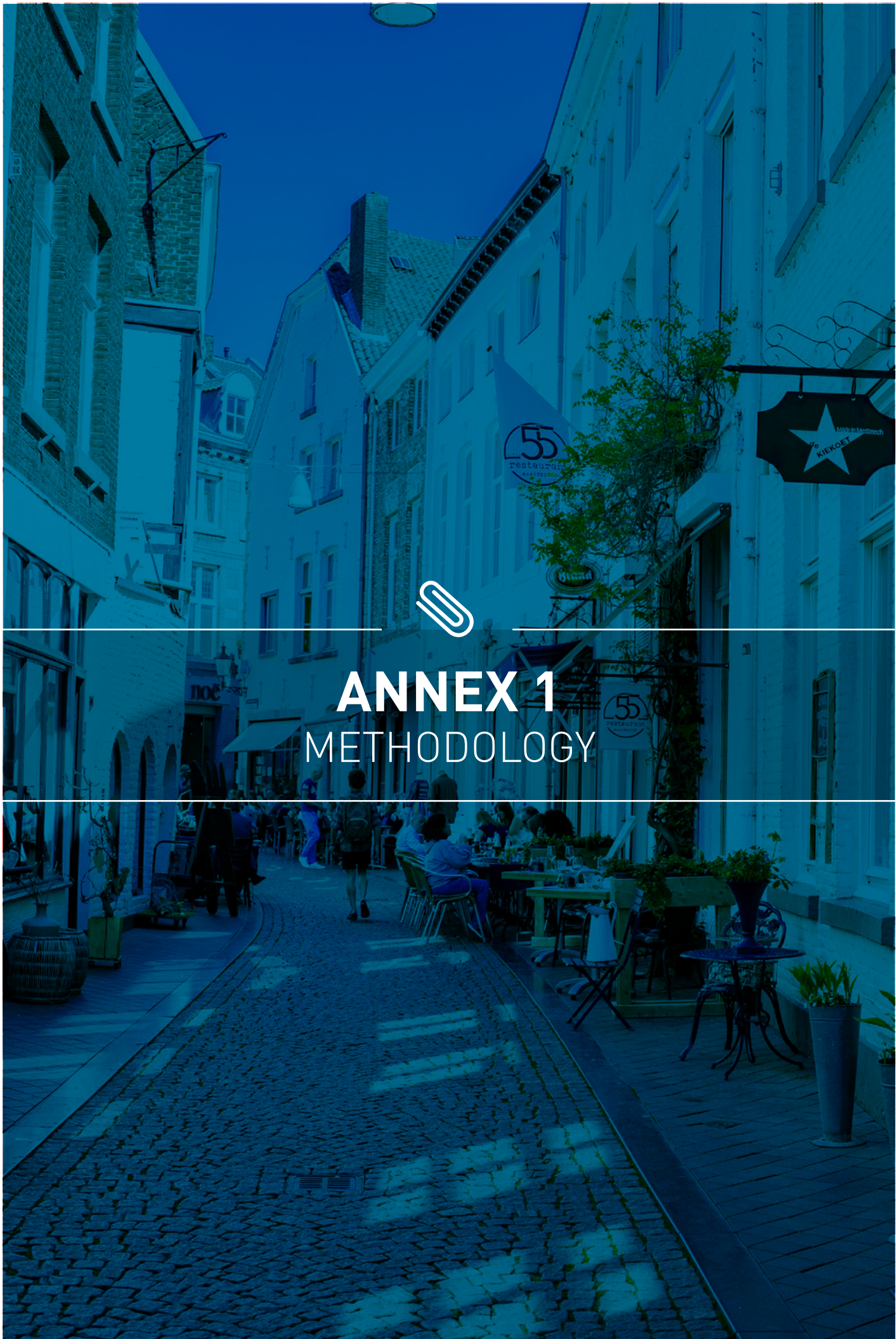
Finally, the transition to a new sustainable tourism ecosystem requires some major shifts in the way that skills are nurtured and developed within the tourism sector. There will, for example, be increased demand for courses in subjects such as sustainable tourism business management, as businesses will need to count on staff who can ensure that standards and protocols are implemented rigorously. For this reason, NTOs will have a key role to play in ensuring that:

- Sustainable practices are embedded in national tourism education curricula
- The national approach to tourism skills development should not only be limited to engaging with those who are already employed, or old enough to work in the sector. Educational outreach programmes with schools should teach children from a young age about the principles of responsible travel, and the attractiveness of the tourism sector for developing a long-term career
- Careers in sustainable business and destination management are easily accessible, and where necessary supported by NTO insights and financial support
- Students are able to gain practical experience through training and apprenticeships in the national tourism sector

CASE STUDY

Turismo de Portugal expands its educational and business advice services through official tourism schools

Since March 2020, Turismo de Portugal has provided a specialised online support service, provided by a team of 60 trainers from its [official Hotel and Tourism Schools](#) who are available to help companies to provide advice in dealing with specific operational issues and, helping to minimise the impact of Contingency Plans for COVID-19. Furthermore, the NTO which runs 12 official schools in the country (with around 3,000 graduates per year) opened its online courses for free in June 2020, to enable all professionals in Portuguese-speaking countries in the world to benefit from online educational content. In addition to this, Turismo de Portugal provides a daily update of market information (air transport, reservations, tour operators and travel restrictions) for tourism businesses, submitted by the offices of Turismo de Portugal worldwide and publicly available on Turismo de Portugal's knowledge management platform, [TravelBI](#)



ANNEX 1

METHODOLOGY



Primary research

The primary research for this report consisted of both qualitative and quantitative methods:

Qualitative research

Four interviews were conducted with CEOs and senior-level representatives from four selected European NTOs - NBTC Holland Marketing, Turismo de Portugal, CzechTourism and the Icelandic Tourism Board. The aim of the interviews was to uncover contextual aspects that will shape NTOs strategic vision in the near future, shifts in consumer demand, post- COVID-19 opportunities for responsible tourism and areas where a coordinated pan-European approach to tourism recovery could be especially helpful.

Quantitative research

Following two waves of surveys, carried out in April and May 2020, a third survey was disseminated in July to members of the European Travel Commission. A total of 21 national tourism organisations participated in the first survey, 28 took part in the second survey, while the third survey was completed by 19 organisations.

While the first two surveys addressed the immediate impact of the COVID-19 outbreak on tourism and the mitigation actions that NTOs took in handling this unprecedented situation, the third survey was mainly focused on recovery initiatives and NTOs' perspectives on the future of tourism and the opportunities posed by COVID-19 for adapting to a more sustainable model of tourism development in Europe. The third survey consisted of 16 questions exploring the shifts in the strategic vision of NTOs, organisational changes, post-COVID-19 challenges, future consumer trends, sustainable prospects for destinations, among others.

A copy of the surveys used is available upon request from the European Travel Commission.

Secondary Research

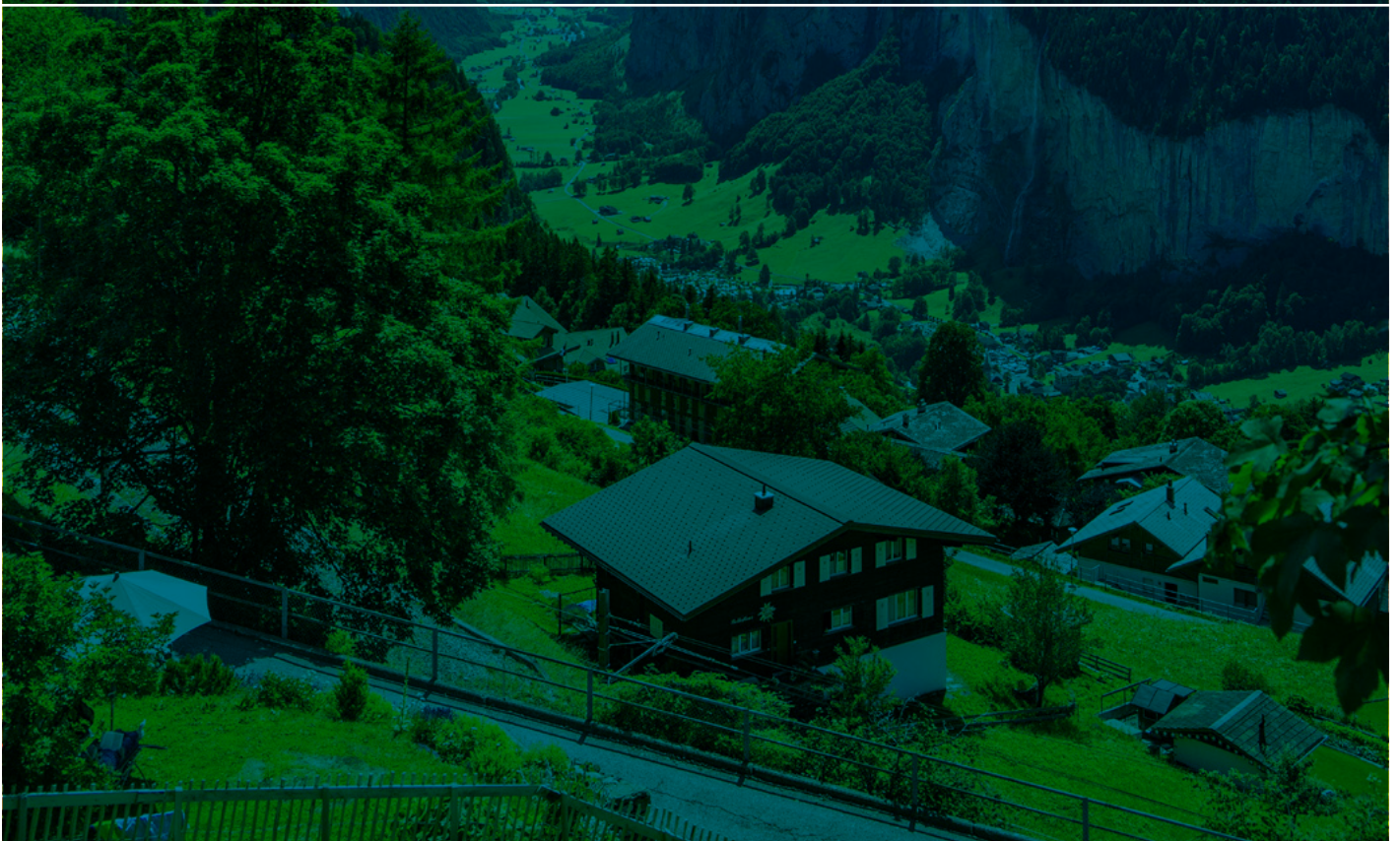
In preparing this report a thorough study of recently published reports, strategies and undertaken actions by NTOs was conducted. The review was focused on newly adopted initiatives by member organisations, recent public announcements of policymakers, revised tourism strategies and action plans, together with studies from leading research organisations.

NB: In the context of this report, 'Europe' relates to the 32 members of the European Travel Commission, plus France, Sweden, Turkey and the United Kingdom. A full list of NTOs that participated in each wave of the survey used for this report is presented in Annex 2.



ANNEX 2

LIST OF PARTICIPATING NTOS





List of participating NTOs

Acknowledgement of participating organisations in the survey

Wave 1 - launched on 30 March 6 April 2020 published on 6 May 2020

- | | | |
|-----------------------|-----------------|----------------|
| 1. Romania | 8. Ireland | 15. Finland |
| 2. Spain | 9. Cyprus | 16. Latvia |
| 3. Lithuania | 10. Bulgaria | 17. Greece |
| 4. Iceland | 11. Estonia | 18. Poland |
| 5. Czech Republic | 12. Netherlands | 19. Britain |
| 6. Denmark | 13. Italy | 20. Slovakia |
| 7. Flanders (Belgium) | 14. Monaco | 21. Luxembourg |

Wave 2 - data collection from 20-27 April 2020, published on 4 May 2020

- | | | |
|-----------------------------|--------------------|----------------|
| 1. Visit Flanders (Belgium) | 11. Bulgaria | 21. Estonia |
| 2. Cyprus | 12. Denmark | 22. Greece |
| 3. Finland | 13. Germany | 23. Ireland |
| 4. Hungary | 14. Iceland | 24. Lithuania |
| 5. Italy | 15. Latvia | 25. Montenegro |
| 6. Luxembourg | 16. Monaco | 26. Poland |
| 7. Netherlands | 17. Norway | 27. Serbia |
| 8. Portugal | 18. Romania | 28. Spain |
| 9. Slovakia | 19. Slovenia | |
| 10. Switzerland | 20. Czech Republic | |



Wave 3 - data collection from 2-9 July 2020, published in this report

- | | | |
|-----------------------|--------------------|--------------|
| 1. Flanders (Belgium) | 8. Portugal | 15. Slovenia |
| 2. Hungary | 9. Poland | 16. Norway |
| 3. Greece | 10. Croatia | 17. Denmark |
| 4. Germany | 11. Estonia | 18. Romania |
| 5. Netherlands | 12. Czech Republic | 19. Slovakia |
| 6. Monaco | 13. Montenegro | |
| 7. Latvia | 14. Bulgaria | |





ANNEX 3
INTERVIEWS WITH CEOs OF
EUROPEAN NTOs



LUIS ARAÚJO

CEO, TURISMO DE PORTUGAL

1. What were the major strategic issues that your organisation was seeking to tackle before COVID-19 arrived?

The main issue that we'd been dealing with was the rapid growth in tourism in Portugal, which had brought a significant rise in spending by visitors but also highlighted the need for us to grow evenly, while protecting the country's natural resources (around 24% of land in Portugal is designated as protected) and to ensure that the impact on our people, as the quality of jobs and skills improves. All of this was brought together in our 2027 Tourism Strategy, the result of more than a year of consultations internally and externally, about the type of tourism people wanted to see in Portugal in the future.

At this time of crisis, we've found this strategy an invaluable tool for us to refer to, as it has shaped our response as an organisation, and has helped to give businesses faith about the future, at a time when many feel very worried. We believe that at a time like this, all our stakeholders need information and a sense of direction. They are also more open than ever to exploring new solutions to historic challenges. The strategy has provided a good framework for this to happen, as evidenced by the huge rise in the number of people taking our online courses on digital marketing and on sustainability run through our organisation's Tourism Schools.

2. Broadly speaking, what are your expectations in terms of your country's tourism performance for the second half of 2020?

If we look at performance in terms of the number of international flights into our five major airports, the month of July 2020 will see only 30% of the number of international flights seen in July 2019. For August this is expected to be around 50-60% of those seen last year, and we hope that this increase continues in October, November and December. However, it is clear that we will not see a full recovery within 2020.



3. What are the internal and external factors that will have the strongest influence on your strategic decision making over the next 6-12 months?

The main factors for us are:

- a. Consumer sentiment in our international markets
- b. Our knowledge about the coronavirus and, linked to this;
- c. What this dictates in terms of social distancing requirements, and what will make consumers feel safe when travelling
- d. How effectively we, as a tourism sector can increase our collaboration with other sectors [e.g. especially the tech sector] to become more effective, e.g. for example, in switching to online booking and ticketing, and using data to learn more about our visitors

Above all, we need to see an internationally coordinated approach to reopening, with clear data and information on the prevalence of COVID-19 and the measures taken to combat it, to help people book with confidence and to build trust more generally among consumers. Official travel advice needs to be based on transparent, reliable data. This is the only major obstacle to travel restarting on a larger scale.

4. How has the COVID-19 epidemic changed the demands on your organisation from different stakeholder groups? Do you think these changes will become more permanent?

Everything about the way our organisation works has changed, with everyone doing something that was outside of their traditional comfort zone. Our teams were given 48 hours' notice that they would be working remotely, and I am proud of the way they adapted to teleworking, using tools such as OpenDrive and Teams. In the investment bank side of our organisation, within just a few days we set up new financial platforms to facilitate the opening of micro credit lines, which allowed us to support 18,000 jobs across 6,000 companies over the course of the following week. Hotel classification visits are now carried out through Zoom, and we now tell our stakeholders that we will prioritise email over paper communications, when they get in touch. More broadly, this crisis has even changed the way our colleagues talk to each other and work together, as we are seeing more collaboration across departments and a real determination to use new solutions to solve problems. I believe that these changes will be permanent, and more customer focused. We must be able to give an answer promptly and effectively to whoever gets in touch with us.



5. Broadly speaking, what internal changes have you made within your organisation to react to COVID-19? Are these efforts focussed solely on recovery, or around longer-term goals?

We use our 2027 strategy to give a sense of purpose and direction, and define our longer-term goals, however we also need short-term plans too. This is because we need our businesses to be up and running and capable of receiving visitors once travel restarts again. Our short-term plans have focussed especially on building trust among consumers. Now, more than 20,000 companies have the Portugal Clean & Safe certification, with protocols issued by the health department. We have also moved quickly to ensure that health declarations can be completed online, and this system is now linked to the Clean & Safe system, so that travellers can opt in to receive updates on local health protection measures when visiting Portugal.

In the longer term, we are focussed on the sustainability of tourism in Portugal and in addressing all of the UN Sustainable Development Goals, not just those that are traditionally associated with tourism. It also means supporting other countries (for example, Portuguese-speaking countries in Africa) to achieve these goals too.

6. Looking ahead to 2021 and beyond, do you think that the COVID-19 epidemic presents a real opportunity to shift to a more responsible model of tourism in your country?

In my view, in spite of all the challenges which are well-known, COVID-19 has created three clear opportunities. Firstly, it has demonstrated the importance of tourism. It has shown that in spite of the criticism around overtourism, it is also not possible for communities or even historic properties to be able to survive without any tourism whatsoever. Secondly, it has also demonstrated that a more sustainable model of tourism was needed for some specific regions and types of tourism product and thirdly, digitalisation has rapidly become mainstream in a way that would have taken many more years to achieve. Joint ventures with tech companies to use digital tools for good destination management will be an essential step for every country to take, not just Portugal.

7. What actions taken at pan-European level could help your organisation the most:

- **Over the coming 6-12 months:** A much stronger relationship between public health and the economy; where reopening can take place based on trustworthy, transparent data to give everyone confidence. This must take place across all borders, not just within the EU.
- **In 2021 and beyond:** In a similar way, we will have to reinforce our international cooperation to address the type of challenges I outlined above, around information, digitalisation and sustainability



8. Finally, based on your experience so far this year, what three, simple pieces of advice would you give to your peers in other European NTOs?

My three pieces of advice to peers in other European NTOs would be as follows:

1. Focus much more closely on how you use data and information within your organisation, and how you support the broader tourism sector to do it too
2. Help to support greater levels of trust and transparency for consumers, to encourage them to book with confidence
3. Maintain our authenticity and keep an open mind about how we can work together; within our organisations and across countries. People are worried about the future, but they also have open minds on how we can solve common problems together. It is essential that we capture this spirit and work with it

SKARPHÉDINN BERG STEINARSSON
DIRECTOR GENERAL,
ICELANDIC TOURISM BOARD

1. What were the major strategic issues that your organisation was seeking to tackle before COVID-19 arrived?

The main issues we faced were related to our success as a destination, in particular the rapid rise in visitor arrivals over the past decade. We were faced with the need to maximise the use of our country's resources while limiting the impact on the environment as much as possible. We were also engaged in creating the tourism strategy to take us through the next decade to 2030. The guiding principles of this strategy had already been published, and we were consulting with tourism stakeholders around the country on an implementation plan. We were also working to build and support a network of local destination management organisations around Iceland.

2. Broadly speaking, what are your expectations in terms of your country's tourism performance for the second half of 2020?

As long as demand is weak in our international markets (which are split 50/50 between European markets and other international markets), we expect to see very minimal tourism activity for the remainder of 2020. The challenges for Iceland in this respect are greater than for other European countries which can easily be reached by ground transportation from neighbouring countries, and which often rely on a stronger domestic market. With a population of around 350,000, domestic tourism demand is relatively limited, especially when compared to our capacity (in 2019 Iceland received around 2.5 million international visitors).



3. What are the internal and external factors that will have the strongest influence on your strategic decision making over the next 6-12 months?

COVID-19 has revealed how dependent the Icelandic tourism sector is on external demand, especially consumer sentiment in our international markets. This in itself is a lesson in how we shall have to improve our preparedness for crisis situations in the future. We also believe that COVID-19 will fundamentally change some aspects of consumer behaviour but we (in the global travel industry, and here in Iceland) still have a long way to go in understanding exactly what these changes will mean for us. Much of these issues will be out of our control, but it is essential to understand them in order to adapt our products accordingly.

4. How has the COVID-19 epidemic changed the demands on your organisation from different stakeholder groups? Do you think these changes will become more permanent?

Broadly speaking, our status as an organisation has increased because both the government and the business community are now looking to us on a constant basis for support, information, guidance and a sense of certainty. Essentially, we are in an extended period of crisis management and expect this to continue for the next 6-12 months, during which time conditions for our tourism industry will be very tough, especially during the winter.

5. Broadly speaking, what internal changes have you made within your organisation to react to COVID-19? Are these efforts focussed solely on recovery, or around longer-term goals?

This crisis does represent an opportunity to change our organisation and our relationships with our stakeholders. We have already made sweeping changes within our organisation to respond to the new demands placed on us. Our day to day work has intensified, as for example, communications with the industry that were previously done once per month, or per week are now carried out on a daily basis, with more staff involved in feeding insights and data into these communications. Our team responsible for handling licences for tour operators and activity companies is now focussed fully on supporting the industry, and those who were working on destination management plans and with DMOs, are now focussed on stimulating demand in the domestic market.

It is already clear that COVID-19 will force permanent changes on consumer demand, and therefore on our response to this. It is important that we plan for recovery, however we must also recognise that it is still too early to contemplate recovery in any meaningful way, while international tourism demand remains so low. It may be that some trends (such as a desire for fresh air and open space) will benefit us, and we shall have to understand the precise dynamics behind this too. However, much work still has to be done on understanding the precise dynamics of consumer demand and how we can benefit from these.



6. Looking ahead to 2021 and beyond, do you think that the COVID-19 epidemic presents a real opportunity to shift to a more responsible model of tourism in your country? What changes do you think are required from your organisation to achieve this?

COVID-19 has to lead to a more responsible model of tourism in Iceland. Environmental issues were very high on our agenda before the impact of COVID-19 was felt, and once the worst of the crisis has passed, we shall of course pick these up and work with them. Some changes may occur organically if as we expect, tourism in the off-peak season is reduced, thereby leading to a lower impact on the natural environment (which is greater during the winter months). It will also be essential for us to find ways to improve tourism productivity. Since the cost of labour is high in Iceland, we shall have to use technology much more effectively in order to become more efficient and find savings where possible.

7. What actions taken at pan-European level could help your organisation the most:

Two main areas stand out:

- **Over the coming 6-12 months:** It will be important to work collectively for a continued easing of restrictions, and to continue with the generally positive trajectory of improved visa facilitation and accessibility seen over the past two years.
- **In 2021 and beyond:** In Iceland and other high-income economies, we need to find ways to improve productivity in the tourism sector, especially by improving our use of technological solutions (e.g. cloud-based computing, use of robots for simple tasks). We will also need to improve our work on product development and research in order to ensure that we start from a much stronger competitive position once demand returns.

8. Finally, based on your experience so far this year, what three, simple pieces of advice would you give to your peers in other European NTOs?

My three pieces of advice to peers in other European NTOs would be as follows:

1. Take advantage of the current situation in order to advocate for, and make changes; especially in reinventing our roles as NTOs and in making changes to our day-to-day activities in order to better serve our strategic goals
2. We must increase our understanding of and engagement with the industry; supporting the industry where they need it most with intelligence and insights, and in making sure that this research reaches a wider audience
3. We need to take this opportunity to boost our research and development to ensure that we are more efficient and competitive when demand returns



FRANTIŠEK REISMÜLLER

**DIRECTOR OF FOREIGN OFFICES
AND B2B RELATIONS,
CZECH TOURISM**

1. What were the major strategic issues that your organisation was seeking to tackle before COVID-19 arrived?

We were dealing with a similar situation to many other European countries; the rapid growth of tourism to the Czech Republic, and cases of overtourism in certain locations. Over the past two years, under the direction of our CEO Jan Herget, we have been working on a new strategy for tourism in the country that aimed to disperse visitors beyond a small number of locations. The aim is to make extended holidays in under-visited regions more viable by improving infrastructure in those regions and improving the way we promote our regions to our international markets. In the case of our organisation, which falls under the direction of the Ministry for Regional Development, our aim is to help the Czech regions to realise their own tourism objectives through co-funding promotional activities with them and guiding them with our market insights.

2. Broadly speaking, what are your expectations in terms of your country's tourism performance for the second half of 2020?

We are expecting a significant drop in arrivals and spending for the year 2020. Not all regions within the Czech Republic have been affected as seriously as others; in fact, some have experienced a rise in visits by Czech citizens who have headed to popular beauty spots. However, some sectors, particularly spas and wellness centres have been very heavily affected (with approximately 90% fall in visits) since they rely heavily on foreign visitors. Some upscale hotels have chosen to stay closed for the time being, as the domestic market does not typically have the requisite level of disposable income to choose this type of hotel. Instead, we are now focusing on neighbouring countries, in particular Germany, Poland and Austria as we believe there may be a potential to benefit from a surge in domestic tourism demand in those countries.



3. What are the internal and external factors that will have the strongest influence on your strategic decision making over the next 6-12 months?

The main factor for us is access and border closures imposed as a result of the public health measures taken. Border control and access for citizens of certain countries are controlled by the Interior and Foreign Ministries and our capacity to influence here is limited. There is also a big question over how quickly long-haul/non-EU markets will recover. Russia and the United States are important markets for us, though due to the COVID-19 situation in these countries the border seems likely to stay closed for some time yet. We would like to see connections re-established with important Asian markets such as China, Japan and South Korea, however this access depends on reciprocity of access from those countries, which as yet has not been forthcoming.

4. How has the COVID-19 epidemic changed the demands on your organisation from different stakeholder groups? Do you think these changes will become more permanent?

Many more business associations have asked for our support in lobbying the central government, and various regions have sought our help, especially as the crisis has worsened and the lack of international demand has become more evident. We were fortunate that at the very early stage of the lockdown (early March) we were still able to organise a collective consultation with the regional tourism administrations to work out how we could support them best through our work at national level. We have also increased our communication with regional tourism administrations, to help them understand how businesses can access central government support, which they in turn communicate to their local network of DMOs.

5. Broadly speaking, what internal changes have you made within your organisation to react to COVID-19? Are these efforts focussed solely on recovery, or around longer-term goals?

We have not undergone a significant restructure; however, we have shifted temporarily to focusing on stimulating demand in the domestic market, in collaboration with all the Czech regions. Like many other organisations we have also become used to remote working, and tools such as Microsoft Teams and SharePoint have become regular tools for us now. We have also taken the opportunity to carry out tasks which had been pending for some time, including a content audit and reorganisation of our own website.



6. Looking ahead to 2021 and beyond, do you think that the COVID-19 epidemic presents a real opportunity to shift to a more responsible model of tourism in your country?

This depends on many factors. We would like to avoid going back to some of the overtourism problems we have known, in particular by taking action to improve regional tourism infrastructure, rethinking the way the Czech Republic is promoted outside the country. We want to get back to pursuing our strategy as soon as possible, in order to better meet the needs of the regions, and by ensuring the decisions we take jointly with the regions are based on reliable market insights. Above all, together with the Ministry for Regional Development, we would like to ensure that extended visits (not just day trips) are viable across the country, for example by improving the variety of accommodation and public transport access. These measures should lead to a more economically sustainable form of tourism across the whole country.

7. What actions taken at pan-European level could help your organisation the most:

Two main areas stand out:

- **Over the coming 6-12 months:** We need to see a unified strategy on the issue of borders and Freedom of Movement for visitors. We like the ETC's newest projects, and we hope that the organisation can continue to adapt its current strategy to meet the demands of NTOs in the current situation.
- **In 2021 and beyond:** Looking ahead, it will be important to get 'back on track' as quickly as possible so that we can send a clear message to potential visitors that Europe is unified, strong and open.

8. Finally, based on your experience so far this year, what simple pieces of advice would you give to your peers in other European NTOs?

My two pieces of advice to peers in other European NTOs would be as follows:

1. There are many fundamental challenges for us to face as a sector right now, so it is more important than ever to ensure that we are working together on critical issues. It would also be good to see a greater mix of countries working together, beyond traditional regional clusters. Now is the time to bring in fresh ideas and fresh thinking.
2. We should use this crisis as an opportunity to demonstrate how important tourism is to our national economies, and also show our citizens that visitors really do support so many jobs and livelihoods in the country.



JOS VRANKEN

CEO, NETHERLANDS BOARD OF TOURISM AND CONVENTIONS

1. What were the major strategic issues that your organisation was seeking to tackle before COVID-19 arrived?

In terms of our strategic approach to dealing with the impact of COVID-19 we had already established a new long-term vision for tourism in the Netherlands, with the launch in January 2019 of 'Perspective 2030: A new vision for destination the Netherlands to benefit all Dutch people'. The issues we were dealing with are all related to the 'strategic cornerstones' in Perspective 2030. They include: the need to improve the benefits of visits for all Dutch citizens; limiting the disadvantages of increasing visits; making more areas of the Netherlands appealing; improving mobility for residents and visitors; making the visitor economy more sustainable, and; improving the attractiveness of the industry as an employer across the country. We also identified our key markets (Germany, Belgium, UK, France, the US and China, and latterly the domestic Dutch market) based on the profile of those consumers who are interested in visiting the Netherlands, and their alignment with our own strategic goals.

2. Broadly speaking, what are your expectations in terms of your country's tourism performance for the second half of 2020?

Counting on research from a range of (inter)national partners, we have made a prognosis for the whole of 2020, and this indicates that 50% of the domestic holidaymakers won't take a domestic holiday in the country, and 60% of the international visitors we could have expected won't come. It is important to bear in mind that the spring months (March-June) in the Netherlands are high season, so it appears we have lost a significant share of visitors for this year. For the second half of 2020 our research indicates that only 60% of consumers in our core markets (see above) are making any firm holiday plans at all. On the plus side, it appears that consumers in our core markets have a good perception of the Netherlands, in terms of safety, familiarity and accessibility and an increasing interest to visit this year.



3. What are the internal and external factors that will have the strongest influence on your strategic decision making over the next 6-12 months?

The six key factors influencing our decision making are as follows:

- a. The public health measures imposed by our government in the Netherlands, i.e. how easy is it to visit?
- b. The public health measures imposed by governments in our core markets, i.e. how easy is it for our core markets to leave their country and travel here?
- c. The strategic cornerstones in Perspective 2030: anything we do in terms of sustainable recovery should be on brand and on strategy.
- d. The guidelines and protocols that apply to the meetings and conventions market, i.e. how restrictive will they be, and how freely will business visitors be able to travel
- e. Practical variables such as available air seat capacity, i.e. how easily can our visitors get here? What routes are available?
- f. Overall consumer sentiment in our core markets, i.e. how do consumers feel about travelling to the Netherlands? How do they feel about our COVID-19 response?

4. How has the COVID-19 epidemic changed the demands on your organisation from different stakeholder groups? Do you think these changes will become more permanent?

The NBTC has always been a public-private organisation, so our stakeholders broadly understand that our approach is not proscriptive, and that we are just one of many organisations that has a stake in tourism in the Netherlands. Just as we did when preparing Perspective 2030, with COVID-19 we believe that it is important to facilitate and connect our public and private stakeholders, initiate and accelerate change, set out a vision for Dutch tourism stakeholders to follow, and help them to understand why it is in their interest to do so as well as in the common interest of destination Netherlands. Short term there is a (temporary) demand for Covid-related intelligence and insights, lobbying support and targeted marketing support. We do of course provide that, always within the parameters of Perspective 2030.



5. **Broadly speaking, what internal changes have you made within your organisation to react to COVID-19? Are these efforts focussed solely on recovery, or around longer-term goals?**

Again, it is helpful that we already had Perspective 2030 in place, and it now serves well as a guide for the type of recovery we would like to see in the Netherlands. Before COVID-19 hit, we were already reorganising NBTC around the demands of Perspective 2030. This has involved organising our teams around the following four core areas of work: **intelligence and insights, strategy and branding, destination development and marketing**. To us, these four inter-dependent core working domains are our definition of **'destination management'**.

We have also 're-entered' the Dutch domestic market, in order to help stimulate demand. In this respect we've initiated a major campaign '#hiermoetjzijn' (You've got to be here') to encourage our domestic market and through a variation on this theme also our core neighbouring markets to see unexplored parts of the Netherlands that also match well with what consumers are looking for right now such as open spaces, fresh air etc. Finally, we have reallocated resources away from activities that were affected by COVID-19 (e.g. cancelled trade events), towards intelligence and research.

6. **Looking ahead to 2021 and beyond, do you think that the COVID-19 epidemic presents a real opportunity to shift to a more responsible model of tourism in your country? What changes do you think are required from your organisation to achieve this?**

Overall, we believe that this crisis does offer the potential for a 'reset', and to accelerate some of the changes that we aimed to see through Perspective 2030. Furthermore, the consumer trends that have emerged as a result of COVID-19 have magnified the importance of our core markets and of certain types of behaviour that potentially have a lower environmental impact (e.g. using electric cars and bikes or travelling by train), which is also a potentially good outcome. However, these shifts are not guaranteed. Understandably, businesses want to recover and grow, and it is questionable whether changes in the consumer behaviour we have seen recently, really will become more permanent. Therefore, more concerted action will be needed from governments, businesses and consumers to ensure that the type of changes we wish to see will become permanent.



7. What actions taken at pan-European level could help your organisation the most:

We recognise that it is difficult to find solutions that will match everyone's needs; however, we could suggest the following:

- **Over the coming 6-12 months:** Policies that create harmonisation across European countries that allow consumers to book and travel with confidence. It would be great to see funding for recovery that is dedicated for specific purposes, and that is easily accessible.
- **In 2021 and beyond:** Longer term recovery programmes that are based on sustainable criteria, and that are transnational in nature, encouraging businesses and governments to work together across borders. Furthermore, concerted action is needed to make rail a genuinely attractive option, both for visitors from within Europe and those visiting from outside, by improving pricing, connectivity and speed.

8. Finally, based on your experience so far this year, what three, simple pieces of advice would you give to your peers in other European NTOs?

Each country has its own local needs and ways of working, however I could suggest:

- Do not take it for granted that COVID-19 will automatically reset consumer behaviour and lead to a more sustainable future for tourism in Europe
- Develop a clear roadmap for the long term and ensure that it is well understood; this will help stakeholders to understand that measures are not only being taken for the short-term
- Keep smiling and keep giving faith to your teams and organisational partners that things will improve!



ANNEX 4

BIBLIOGRAPHY



ETC AND SUSTAINABLE TOURISM - FURTHER READING

Partnership with CELTH, ETOA & NECSTour to focus on sustainable tourism
<https://etc-corporate.org/news/new-partnership-to-focus-on-sustainable-tourism-in-europe/>

Conference on Managing sustainable tourism growth in Europe
<https://etc-corporate.org/event/conference-on-managing-sustainable-tourism-growth-in-europe/>

Sustainable Cultural Tourism Awards 2020 (Partnership with European Cultural Tourism Network (ECTN), Europa Nostra and the Network of European Regions for Competitive and Sustainable Tourism (NECSTouR)
<https://etc-corporate.org/news/applications-now-open-for-the-destination-of-sustainable-cultural-tourism-awards-2020/>

Study 1:

Tourism and climate change: Mitigation embracing the Paris Agreement
<https://etc-corporate.org/reports/tourism-and-climate-change-mitigation-embracing-the-paris-agreement/>

Study 2:

Sustainable tourism in Europe: Status Quo and Common Challenges (this is a student thesis, but it was written after the ETC, in partnership with Foundation for European Sustainable Tourism (FEST), awarded a scholarship funding)
<https://etc-corporate.org/reports/sustainable-tourism-in-europe/>



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BIBLIOGRAPHY

- ¹ European Travel Commission (2020) Quarterly Report - Q2 2020, July 2020, available at: www.etc-corporate.org
- ² For more information on domestic and short-haul travel resilience, please refer to Chapter 4 of the Quarterly Report Q2, European Travel Commission (2020)
- ³ A travel bubble, or a travel corridor, is an agreement between two or more neighbouring countries, where citizens are allowed to travel freely within the particular area without undergoing quarantine upon arrival
- ⁴ Euromonitor (2020) The implications of COVID-19 for the Global Economy, available at: www.euromonitor.com
- ⁵ Smart Travel Lab & Kantar (2020) Anticipating the Future of travel, available at: www.smarttravellab.org
- ⁶ UNWTO (2020) One Planet Vision for a Responsible Recovery of the Tourism Sector, June 2020, available at: www.unwto.org
- ⁷ UNWTO (2020) Global Guidelines to Restart Tourism, 28 May 2020, , available at: www.unwto.org
- ⁸ Ibid One Planet Sustainable Tourism Programme (2020)Ibid McKinsey & Company (2018)
- ⁹ UNWTO (2020) Recommendations for the Tourism Sector to Continue Taking Action on Plastic Pollution During Covid-19 Recovery, July 2020, available at: www.unwto.org
- ¹⁰ European Commission (2020) Tourism and Travel in 2020 and Beyond: A Communication from the Commission to the European Parliament, the Council, the European Economic and Social Committee and the Committee of the Regions, 13 May 2020, available at: www.europa.eu
- ¹¹ European Travel Commission (2020) Experience Europe Brand Strategy, March 2020, available at: https://etc-corporate.org/experience_europe_brand_strategy/
- ¹² The ETC Market Study on Generation Z Travellers was published in July 2020 and features a range of insights on the travel motivations of young people aged 8-24 years. For more information please visit: <https://etc-corporate.org/reports/study-on-generation-z-travellers/>

