

TO RECOVERY & BEYOND

THE FUTURE OF TRAVEL & TOURISM IN THE WAKE OF COVID-19

WORLD TRAVEL & TOURISM COUNCIL

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SEPTEMBER 2020

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FOREWORD

In the span of a few months in the first part of 2020, the world has shifted.

First and foremost, the novel coronavirus, or COVID-19, has caused incredible tragedy. The number of people suffering from illness, death of loved ones, unemployment, economic impact, health and poverty is overwhelming. Together, we share our heartfelt sympathy for those bearing these burdens and our sincere appreciation for those supporting on the frontlines.

More broadly, COVID-19 has altered our way of life dramatically. Our social interactions, our professional dynamics, and our digital relationships are all transformed. The Travel & Tourism sector has certainly not been immune to that transition.

Indeed, the Travel & Tourism sector has already been tremendously impacted. Seemingly overnight, hundreds of countries suspended flights or halted international travel. Even domestically, national and sub-national jurisdictions instituted shelter-in-place orders. Many businesses were forced to close on a temporary basis, often escalating into permanent closures, unfortunately. While businesses that remained open, only saw limited activity. This all transpired such that at the peak of the crisis, a shocking one million Travel & Tourism jobs were lost daily.

Yet, we have also witnessed inspiring commitment and strength among our fellow Travel & Tourism leaders. Businesses are donating food; supporting repatriation; and opening their doors to the homeless, victims of domestic abuse, frontline workers, and those sick or quarantined due to COVID-19. Travel & Tourism workers are undergoing training to provide medical care, sewing masks for the community, and taking pain-staking precautions to keep travellers safe. Accustomed to supporting guests in their day-to-day work, they have truly breathed new life into the term "hospitality."

Moreover, businesses and destinations are seizing the moment to come together and build on their experience to enhance their approach so as to ensure the sustainable and inclusive recovery of the sector. To recover faster, experience has shown the importance of a global coordinated approach with public-private cooperation, the need to enhance the current seamless travel experience, enacting global protocols for health & hygiene, such as WTTC's Safe Travels Protocols, to rebuild the trust of travellers and embracing the acceleration of technological transformations. At the same time, it will be essential for governments to continue supporting the Travel & Tourism sector throughout the recovery, while removing travel restrictions.

As we reflect on these events, we recognise that they could signify only a temporary shift, or they could alter the future landscape of Travel & Tourism. With that in mind, we engaged with top executives in the sector, representing diverse industries and geographies, to hear their perspectives on the impact of COVID-19. Over the course of these interviews, we identified the following trends, which we believe are here to stay for at least the next 24 months:

Demand Evolution | Health & Hygiene | Innovation & Digitisation | Sustainability

To elaborate on these trends, we present **To Recovery & Beyond**. In this report, we explore the implications of the trends for each of four key Travel & Tourism stakeholders: travellers, businesses, workforce, and communities. We also highlight concrete manifestations of these trends and the unique ways in which Travel & Tourism players are responding. Most importantly, we highlight the need for government to support the sector now to recover the millions of jobs impacted and build its resilience into the future.

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HIGHLIGHTS

The world has and continues to suffer sizeable losses and setbacks due to COVID-19. Not least among those setbacks is the shock to the Travel & Tourism sector. As 90% of the global population adjusted to life under travel restrictions and others stayed home in fear of the virus itself, the sector came to a near-total standstill. Communities, large and small, depending on tourism are shouldering the burden of zero revenues, and millions have been furloughed or laid off within a few short months. Indeed, more than 121 million global Travel & Tourism jobs and an estimated US$3.4 trillion in global GDP could be lost as a result of COVID-19 according to WTTC's baseline scenario; a figure which could reach 197 million jobs before the end of the year according to our downside scenario due to lack of international coordination and international leadership.

Yet, Travel & Tourism private sector leaders have remained strong and steadfast in the face of adversity. Over the past few months, the sector has sought to enhance traveller safety, provide for their workforce, and support local communities. In effect, industry leaders are seizing the crisis as an opportunity to further enable the inclusive and sustainable growth of the sector. While governments have extended some support, more is needed, both in terms of coordination and the implementation of enabling policies to support the sector's recovery. It will be essential to have a global coordinated approach, enhance the current seamless travel experience, embrace the integration of new technologies and enact global protocols for health and hygiene to ultimately rebuild the confidence of travellers.

As we re-imagine the future of Travel & Tourism, and explore policy recommendations, four trends are expected to lead the way through recovery and beyond:

DEMAND EVOLUTION

Traveller preferences and behaviours have shifted toward the familiar, predictable, and trusted. Domestic and regional vacations and the outdoors will reign in the short-term, with tourism businesses and destinations already adapting. It will be vital, however, to ensure early stimulation of the all-important recovery of international travel. Transparent communication will be even more important to travellers in spurring demand. Though the longevity of these shifts is still unclear, the Travel & Tourism sector has a unique opportunity to rethink prevailing business models and co-create with local communities as it considers its most valuable asset: its people.

HEALTH & HYGIENE

Health and safety are paramount in this new era. Personal experiences, advice from experts, and concerns for distancing will guide consumer behaviour in the short- to mid-term. Businesses will have to collaborate even more closely with their extended value chains to ensure readiness and the implementation of likeminded protocols, such as WTTC's Safe Travels protocols. In this context, trust, extensive communication and the flow of accurate information, between travellers and employees, businesses and suppliers, and visitors and local communities; will be a leading engine in the recovery of the sector.

INNOVATION & DIGITISATION

COVID-19 is proving to be an unexpected catalyst in the Travel & Tourism sector's quest for innovation and the integration of new technologies. Amid stay-at-home orders, digital adoption and consumption are on the rise, with consumers now expecting contactless technologies, including biometrics among others, as a basic prerequisite for a safe and seamless travel experience. Cybersecurity is only becoming more important, particularly as remote work becomes the norm in the short to medium term and as identities are digitised. While digitisation offers tremendous opportunities, precautions are needed to make sure employees and local communities are not left behind. Interestingly, the acceleration of the digital agenda is one positive outcome of this crisis.

SUSTAINABILITY

From widespread unemployment and anti-racism movements to the restoration of natural habitats and the impact on ecosystems, the world has been re-invigorated to tackle social, environmental, and institutional sustainability. In particular, heightened public awareness of the environment and wildlife markets and poaching has boosted advocacy for wildlife protection as well as ocean preservation. Businesses are facing growing scrutiny, for both their environmental track record and their support for diversity and inclusion. Given the high participation of women, minorities and youth compared to other sectors, Travel & Tourism has a unique ability to further protect and engage vulnerable groups whilst reducing poverty and inequality. This is the time for the sector to accelerate the meaningful changes that will make a lasting difference for future generations.

POLICY RECOMMENDATIONS

As the sector transitions through the phases of recovery, the consideration and implementation of diverse policies will be key to support the sector. In the initial phase, policies from the international coordination of border openings to the definition of common standards and supporting workers to the significant expansion of testing availability will be key. As the sector adapts to the next normal, it should consider policies incentivising travel, facilitating seamless coordination, and enhancing upskilling while rethinking the workplace, among others. As the sector enhances its resilience, governments can strengthen environmental protections, engage more closely with local communities, while creating and implementing a new vision for the workforce together with the private sector. Ultimately, to achieve recovery, enhanced coordination within and between governments as well as alignment between the public and private sector will key.



SECTION I: INTRODUCING A NEW CONTEXT



Within the span of a few months, in early 2020, the world transformed. The global spread and impact of COVID-19 is unlike anything society has faced before, with a complex and devastating amalgamation of health, economic and social issues. As the world came to a standstill, so did Travel & Tourism, a sector which not only accounts for over 10% of global GDP but for one in ten jobs on the planet, and one in four new jobs created globally in the last five years. The consequent impact on this critical sector has been catastrophic, requiring unparalleled cooperation and multifaceted solutions to support Travel & Tourism through this crisis and enhance the sector's resilience to future shocks.

COVID-19 BACKGROUND

In March 2020, the World Health Organisation (WHO) declared the novel coronavirus, or COVID-19, a global pandemic[2]; following its identification in Wuhan, China in December 2019. As of 1 September 2020, there were over 25 million cases globally, with fatalities surpassing 850,000 worldwide[3]. Since the escalation of COVID-19 to a pandemic, countries across the world have implemented lockdowns and stay-at-home orders as well as border closures[4]; affecting 3.9 billion people worldwide, or half of the world's population. While some countries imposed compulsory confinements such as Italy, India, New Zealand, and the UK, others urged their citizens to stay at home, without enforcement measures, including Germany, Mexico, and Canada. 26 countries, including Kenya, Egypt, Panama, and Chile, introduced curfews, while local freezes on population centres were imposed in Riyadh, Helsinki, and Kinshasa.

In light of the exponential spread of COVID-19, lockdown measures have generally been acknowledged as an effective mechanism in slowing down contamination for high-risk contexts. Researchers estimated that had China not locked down Wuhan on 23 January 2020, the number of COVID-19 cases would have been 65% higher in 347 Chinese cities outside the Hubei Province by 29 February 2020[5]. The implementation of early testing by countries has also enabled the swifter isolation of infected individuals.

IMPACT ON TRAVEL & TOURISM

Yet, despite the apparent success of lockdowns in slowing the spread of COVID-19, the measures implemented have shattered the Travel & Tourism sector. As of April 2020, over nine in ten people on the planet, or 7.1. billion people lived in countries with travel restrictions in place[6]; with 39% of the global population living in countries which completely closed their borders for non-citizens and non-residents, including China and India, among others. In effect, as of May 2020, three in four countries and territories globally suspended travel from at least one other destination[7]. Current forecasts estimate that international tourist arrivals could drop by 60-80% in 2020[8]. In fact, according to WTTC's baseline scenario, over 121 million jobs will be impacted in the global Travel & Tourism sector, with a loss of $3.4 trillion in global GDP[9].

Faced with significant reductions in revenues amid steady costs, many players within the Travel & Tourism sector, small and large, have been forced to furlough or lay off a significant portion of their workforce. WTTC estimated that during the peak of the crisis, one million Travel & Tourism jobs were being lost every day[10]. In the case of numerous Small and Medium-Sized Enterprises (SMEs), which account for 80% of the sector[11], operations have had to be frozen or ceased altogether. In the United States, for instance, it is estimated that 75% of independent restaurants that have temporarily closed during the crisis will not survive[12]. Similarly, in China 20% of SMEs stated in February that their cash flow would not allow them to survive more than one month, and 64% said they could not survive for more than three months[13].

Large firms have also suffered from the downturn, with organisations including flybe[14], Virgin Australia, Avianca, Aeromexico, and Hertz filing for bankruptcy[15]. As of 22 June, 513 companies in the restaurant industry, 297 companies in transportation and 117 aviation companies filed for bankruptcy. Estimates for the aviation industry suggest a net loss of $84.3 billion in 2020[16]; while over 50% of tour operators anticipate, at least, a 50% revenue decline compared to 2019, with 10% expecting a decline of 90% or more[17].

IMPORTANCE OF THE SECTOR

As one of the fastest growing sectors in 2019, accounting for one in four new jobs[18] created worldwide over the last five years, the slowdown of Travel & Tourism will have devastating ripple effects beyond the sector itself. In effect, according to WTTC's 2019 data, the sector accounted for 10.3% of global GDP and supported the livelihoods of 330 million people, outpacing the growth of the global economy for the ninth consecutive year. For countries which are heavily reliant on Travel & Tourism, the impact of COVID-19 on the sector will be further exacerbated. For instance, Travel & Tourism's total contribution to GDP was of 91.3% for Macau, 73.6% for Aruba, 56.6% for the Maldives, 43.3% for the Bahamas, and 40.5% for the Seychelles[19]. Similarly, the impact will be extensive for countries with the largest Travel & Tourism GDP contributions in absolute terms, notably the US, China, Japan, Germany, Italy, the UK, France, Spain and Mexico and India.

Not only is Travel & Tourism an important contributor to entrepreneurship, but it continues to create opportunities for women, youth and minorities. It does so regardless of gender, education level, background or religion, creating meaningful social impact, particularly for developing nations around the world. In effect, women account for 54% of employment in the sector, compared to 39% for the global economy[20], and employs almost twice as many youth than other sectors[21]. This inclusive sector's contribution to local communities is also significant, supporting employment and income generation, local cultural and natural asset preservation, access to quality infrastructure, among other aspects.

WAY FORWARD

Amid the current socio-economic context and the ever-evolving demand landscape, businesses and destinations will require significant support from governments to turn current obstacles into opportunities for recovery. Governments have already taken some actions to mitigate the impact of COVID-19 on the Travel & Tourism sector, including easing travel restrictions, supporting with liquidity and fiscal measures, protecting workers, introducing health protocols with the private sector, promoting tourism, as well as investing and encouraging innovation[22].

For instance, Japan will spend JPY 3.6 billion to enhance information to travellers and promote tourism destinations, while Norway has reduced the VAT rate for travellers across the sector from 12% to 8%. While France implemented one of the most generous furlough schemes costing €26bn and paying 70% of employee salaries up to €6,927 gross per month; Malaysia delayed tax instalments by six months for tourism, as opposed to three months for the rest of the economy. South Korea has moved to simplify its hotel classification system, legitimising sharing economy accommodation platforms and relaxing regulations for the camping industry. From a liquidity perspective, Germany offered unlimited loans with no interest to business, while Hong Kong bolstered its capacity for promotion, allocating an additional $90.2 million to its Tourism Board. Another example is the UK, which reduced its VAT from 20% to 5% for hospitality and created a £25,000 grant scheme for businesses in the retail, hospitality, tourism, and leisure sectors that occupy rental properties as sole tenants. To stimulate demand, Iceland is offering domestic travel vouchers and created a domestic promotional campaign, one that will likely be escalated internationally. Italy, Egypt, the Kingdom of Saudi Arabia, and Dubai, have also launched new campaigns to promote tourism. Finally, many countries are planning for recovery, with New Zealand, for instance, conducting a study to "re-imagine" tourism post COVID-19.

Still governments can and must do more. In effect, governments have the opportunity to recognise the importance of Travel & Tourism as a driver of job creation and growth, and a mechanism to further equality, reduce poverty and enhance inclusivity in society. The sector now needs the right assistance to bring back the millions of jobs and people whose livelihoods have been impacted.

While it is commonly acknowledged that the widespread availability of a vaccine would be a gamechanger for Travel & Tourism; interim solutions that enable people to live and travel prior to a vaccine becoming accessible will be key. Although vast differences presently exist on the hesitation to travel, people will eventually be more comfortable and go further afield. For now, only 17% of global travellers say they will defer travel until they receive a vaccine[23], highlighting the continued wanderlust, as 83% of global travellers plan to travel.

Nonetheless, Travel & Tourism businesses and destinations may still need to adapt and reinvent themselves for this next normal, ultimately transforming the sector as we know it; adjusting but ultimately coming out stronger through the process.

REPORT OVERVIEW

In this context, WTTC partnered with Oliver Wyman to develop this report exploring the Future of Travel & Tourism using a data-driven approach and building on the insights of industry leaders gathered through in-depth interviews. The report identifies the trends reshaping the Travel & Tourism sector in the wake of COVID-19 and outlines how these trends manifest for key stakeholders, namely, travellers, businesses, the workforce, and local communities. On the basis of the trends and their implications for the sector, the report proposes several policy recommendations for governments and destinations to support the restart and recovery of Travel & Tourism.

Through this analysis, WTTC and Oliver Wyman hope to further enable informed decision-making among both public and private stakeholders as they navigate the impacts of COVID-19 in the short to mid-term. By raising awareness among key stakeholders, this report aims to promote an earlier recovery within Travel & Tourism, whilst enhancing resilience for the future.



SECTION II: TRAVEL & TOURISM TRENDS AND IMPLICATIONS

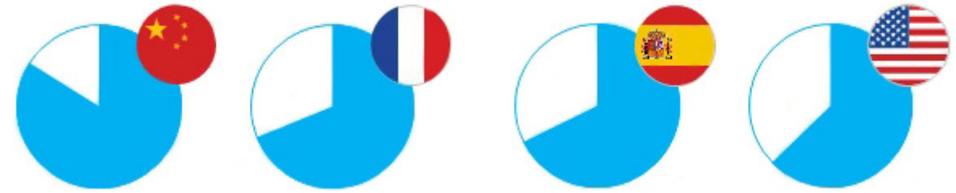
1. DEMAND EVOLUTION

COVID-19 is transforming traveller inclinations and behaviours toward the familiar, predictable, trusted, and even low risk. Domestic and regional vacations, extensive research and planning, and the outdoors will reign in the short-term, with tourism businesses and destinations already adapting accordingly. Proactive communication will be key to spur demand. Though the longevity of these shifts is still unknown, the Travel & Tourism sector has a unique opportunity to rethink and refresh prevailing business models, in partnership with local communities and with consideration for its most valuable asset, its people.

Domestic travel preferred

58%
of travellers will take primarily domestic trips for rest of 2020

Next leisure trip likely to be domestic
% of country's respondents



Abundant support to local communities



Emerging trends among travellers

40%
of US travellers are re-thinking destinations, often in favour of beaches & small towns/rural areas

8.5 - 9
Average length of stay for short-term accommodations, up from previous average of 3.5 - 5 days

70%
of North American leisure travellers say they would book during COVID-19 if changes were fee-free

Source: Oliver Wyman Traveler COVID-19 Survey, Destination Analysts, Guesty, Fuel Travel

TRAVELLERS

The Domestic & Regional Rebirth

As travellers plan their next trip, they will first look to destinations close to home. This trend has been apparent in China, for instance, one of the first countries to re-open, with 77% of Chinese travellers favouring domestic travel[24] within three months after the peak of the crisis. A similar sentiment is resounding across the world, with 71% of Americans looking at domestic locations up from 58% last year[25]. In the near term, this could be *"the rebirth of the great American Road trip"* according to Keith Barr, CEO of InterContinental Hotels Group (IHG), with 47% of Americans considering in-state road trips as their next holiday[26], a trend permeating across the globe, given the current concerns around crowded places[27]. The desire to stay close to home and travel domestically or regionally is also fuelled by the comfort of the familiar and the fear of getting infected or quarantined in a distant destination[28], with 86% of recent air travellers revealing they were somewhat or very worried about being quarantined while travelling[29]. To promote local exploration, NYC & Company has launched its "NYC-Cation" initiative which encourages locals and regional visitors to stay and support New York's revitalisation through exploration during this challenging time[30].

To date, domestic and regional travel have already re-started, as exemplified by an increase in bookings from the Caribbean to Europe including destinations such as Spain, Greece, France and Portugal among others. Still, quarantines in certain destinations continue to have a negative impact on local economies and hinder the Travel & Tourism sector's recovery.

Long-haul travel will take more time to recover. According to Darrell Wade, Chairman of Intrepid Group, *"Wealth will also be an issue as we are looking at a serious recession – the uncertainty around future income will make people focus on domestic and cheaper holidays"*. Unemployment rates are rising across OECD countries[31] and, middle class consumption is shrinking[32] with more people falling into poverty[33]. Citizens are also increasingly concerned they could lose their jobs due to the pandemic, with 60% of Americans fearing job loss[34]. In this context, cost will have a large impact on travel decisions in the short to medium term[35] [36]. Eduardo Kina, CEO of Alatur JTB, fears that this could be the *"end of the golden era of globalisation, after years of feeling that the world was getting smaller; to a new world, at least for a while, where travellers will maximise the time spent at the destination"*.

Appetite for Risk

Being significantly more likely to be single[37], the younger generation has the greatest flexibility to travel without the risk and fear of exposing a loved one at home to the virus. A traveller survey found that the "fear of exposing others" was the top concern for 39% of travellers in the UK and 31% in France[38]. In this context, the tolerance to risk will remain low or close to zero for those with family members who are immunocompromised or older[39].

Travel will likely be kickstarted by the less risk averse travellers and early adopters, from adventure travellers[40] and backpackers[41]to surfers and mountain climbers. Not only are these types of travellers more intrepid, but these niche verticals are usually about immersion in nature, staying active and visiting remote communities, and as such they do not trigger the same fear of crowds. Following the earthquake in Nepal in 2015, for instance, adventure travel was the segment which recovered fastest[42]. Variance in risk aversion can be witnessed in different cultures, with some nationalities requiring greater confidence in the safety of destinations to travel. While 12% of Chinese travellers would travel internationally for their next leisure trip, 54% of Brits and 52% of German travellers would[43]. While Scandinavians are more comfortable with ambiguous situations[44], Japanese and South Korean travellers are more sensitive to risk and are likely to rely more on traveller testimonials than marketing campaigns[45]. Young families, with parents aged 25-40, have also shown a propensity to travel internationally in the near future[46]. This family trend, coined "togethering" was witnessed after 9/11 and the 2008 financial crisis, which some have ascribed to a desire to take advantage of any time together against all odds[47].

Off-The-Grid Experiences

To avoid crowds, travellers will increasingly seek out "off-the-beaten-path" nature and outdoor destinations. In fact, nearly 40% of US travellers stated that COVID-19 has made them rethink the types of destinations they will select, with beach destinations (38.2%) and small towns/rural areas (30%) topping the list[48]. These intentions are already translating into more future bookings for remote destinations such as Alaska and chartered raft trips[49]. Coupled with the shift to lesser-known destinations, will be a renewed interest in authentic and immersive experiences, driving demand for niche markets, such as community-based travel and cycling holidays. Luis Araujo, CEO of Turismo de Portugal concurred, noting *"those who choose to travel will value the authenticity of the country even more"*. According to Geoffrey Kent, Founder and Co-Chairman of Abercrombie & Kent, the definition of luxury will change, it will not be so much about *"huge bottles of champagne and silk sheets, but rather about adventure tourism with comfortable nights, delicious food and good wine"*.

Scepticism remains about virtual reality as a replacement for travel, as people want, more than ever, to experience something new and real. Steve Armitage, General Manager – Destination at Auckland Tourism, Events, and Economic Development (ATEED), explained *"digitisation is a hook for people to get a taste of what it could be like to visit"* but travellers will be looking for the *"on-the-ground experience"*. More and more, travellers expect a memorable, individualised experience, with 79% of people claiming they were more likely to visit their dream destination once restrictions were lifted[50]. According to Alex Zozaya, CEO of

Apple Leisure Group, people will prioritise experiences over expensive clothes and products, *"putting more energy and more of their own resources, including financial resources, into living these experiences with friends, family and nature than in the past"*. There will likely be a thinning of mass tourism and *"an emergence of new destinations in isolated locations as consumers veer away from massification"* according to Aileen Clemente, CEO of Rajah Travel Corporation.

Finding Comfort in Planning

Amid uncertainty, travellers will place greater importance on pre-trip planning and rely on online forums for swift and transparent access to information. In fact, over 75% of American travellers said they would either put together a somewhat developed or very well-developed plan for their next leisure trip[51]. Pinterest, a visual discovery engine, has emerged as a popular form of travel escapism during stay-at-home orders[52], with a survey in early May revealing that 56.1% of American travellers missed planning travel[53]. Still, as part of their research, travellers will now spend a *"significant amount of time on 'show me, explain to me how you are executing on safety'"* according to Federico Gonzalez, President and CEO of the Radisson Hotel Group.

In this new context, travellers will want to optimise their limited travel opportunities, opting for longer more meaningful vacations over shorter trips. Short-term rentals which were once being booked for 3.5-5 days on average, are now trending at 8.5-9 days[54]. According to Martin Zanone, Managing Director of Eurotur, a Destination Management Company based in Argentina, *"Travellers want to maximise the number of nights per accommodation or destination, so we are seeing longer trips and itineraries up to 20 days"*. Travellers will also expect greater flexibility and more favourable terms for future bookings. Among North American leisure travellers, nearly 70% claimed that flexibility to change dates without penalty would persuade them to book a future vacation during the COVID-19 outbreak – more than any other factor, including reassurance about sanitising[55]. The private sector is listening, with companies such as Emirates extending its fee-waiver programme[56], while Royal Caribbean is offering its "Cruise with Confidence" flexible booking policy[57]. Richard Fain, Chairman & CEO of Royal Caribbean noted, *"Our previous policy set earlier deadlines for guests to cancel their cruises, and that added unnecessary stress. We think putting more control in our guests' hands helps them make informed decisions about whether to keep their existing vacation plans or trade out for a more convenient time or itinerary"*.

Empowered Travellers

With occupancy levels down across all regions compared to 2019[58], travellers will have more leverage to demand action from travel providers to reassure them of safety and flexibility. Already, travellers have turned to social media to highlight the lack of physical distancing in certain contexts, requiring companies to swiftly respond. For instance, United committed to alert customers 24 hours in advance, if their flights were nearing capacity, and allow them to rebook to a different flight or receive a credit through 30 June[59]. Service providers will take action to protect their reputation and maintain the trust of travellers. Keith Barr, CEO of IHG, echoed this sentiment, explaining *"we don't have a playbook for how to handle this situation, but we have to be principle-led and recognise that we have a set of stakeholders, and each of those stakeholders should come out saying that we did the right thing"*.

The Return of Business Travel

While business travel will not be the first segment in travel to recover, it is resilient and essential to the global economy. From the 9/11 attacks to the 2008 global financial crisis, global business travel was able to effectively rebound from these shocks[60]. While the significant uptake of virtual meetings has prompted the question of whether face-to-face meetings were needed to do business, research from Harvard's Growth Lab reveals a direct link between a country's incoming business travel and the growth of new and existing industries[61]. Business travel leads to the transportation of ideas, and if used efficiently, can support organisations in the building of trusted relationships and partnerships, which in turn support economic growth. As for leisure travel, domestic business travel will likely resume first, followed by regional travel to nations part of travel corridors and intercontinental travel. Building trust in safety of the business travel experience will be key for all, but particularly for baby boomers who are keen to see more stringent travel safety protocols. Indeed, nearly 70% of baby boomers wish to see passenger health screenings at airports compared to less than half of millennials[62].

BUSINESSES

Coping Mechanisms

In response to COVID-19, changing regulations and customer demands, businesses will need to re-evaluate their operating models in the short-term and, in some cases, their business models altogether. From the "quick wins" such as launching virtual payment platforms to avoid paying in cash or enhancing cleaning and hygiene best practices; to the more complex task of reconsidering what in-person meetings will look like in the future and whether new business or pricing models will be needed to maintain profitability; no industry is immune.

In terms of hygiene, airports, including Dubai Airports, have put in place extensive protocols including, disinfecting handrails with installed UV lights on escalators as well as establishing physical distance limitations in check-in areas/boarding lounges, among others. To build confidence among customers and its workforce, many Travel & Tourism businesses have implemented protocols

such as screening guests and team members, physical distancing, requiring facial coverings, establishing hand-sanitising stations, extending meal service hours and limiting capacities in venues. In Las Vegas[63], for instance, casinos have set up plexiglass shields or are requiring masks at tables and are implementing mobile food ordering. Within hospitality, the franchised model could become more attractive, in part because it may be easier to follow protocols issued by corporations.

Given the need for consistency and coordination at the global level to rebuild traveller confidence, WTTC brought together the private sector across ten industry verticals to draft effective *SafeTravels* protocols to optimise sector-wide recovery. To showcase alignment to the *SafeTravels* protocols and recognise destinations which have implemented likeminded protocols, WTTC launched its *SafeTravels* stamp. Building on the expertise of key organisations is essential. As such, WTTC recommends that the aviation and airport industries refer to ICAO's guidance and framework.

Certain businesses may also need to rethink their pricing models to cope with reduced demand in the short term and potential capacity restrictions into the future. While dynamic pricing has been used within the sector for years, measures relating to physical distancing, may further exacerbate this effect. Paul Griffiths, CEO of Dubai Airports, noted that *"physical distancing on planes significantly undermines the economic model of airlines, who will need to hike fares to stay in business, at a time when customers have less disposable income"*, in turn making tickets more expensive at a time when customers have less disposable income. While theme parks, such as, Six Flags[64] and Walt Disney World[65] are now requiring advance reservations to address local safety requirements and crowd management. Theme parks, museums and other attractions may also implement dynamic pricing as a solution to spread demand, where prices would increase with the number of tickets sold for a given date. In contrast, the current traveller trends toward flexibility may also encourage businesses to adjust their pricing models for near-term discounting.

Economic Comeback

In the broader macroeconomic context, the industry will have to contend with an economic slowdown at best, or a full-blown recession at worst. According to WTTC's latest current scenario, a total of 121.1 million jobs will be impacted in the global Travel & Tourism sector with a loss of $3.4 trillion in global GDP. Meanwhile, global visitor numbers will drop by 53% for international arrivals and by 34% for domestic arrivals. Paul Abbott, CEO of American Express Global Business Travel (GBT), asserted that the economic fall-out was certain to reduce spending on business and leisure travel. As a result, many businesses, particularly SMEs, which account for 80% of the sector, will face severe revenue shortfalls and liquidity challenges; with a significant portion going under. Matthew Upchurch, Chairmain & CEO of Virtuoso, stated that *"if recovery is too lengthy, the nature of agencies being small businesses means a significant number may not survive. This will have a devastating impact that is disproportionate to women, minorities, and small businesses"*. In effect, 83% of travel businesses in the US are small businesses and 60% of these are owned by women.

In these challenging times, some businesses are seizing opportunities to develop alternative use cases for their core products within related sectors with growing demand. Ride-hailing businesses, such as Uber[66], have pivoted to offer grocery delivery on demand. In the US, the Red Roof hotel chain launched its "Work Under Our Roof Day Rate" with reduced rates for anyone looking for a quiet place to work during the day, including Wi-Fi & in-room coffee. Another new marketing program, called "Buy Now, Stay Later", is attempting to help hotels during the crisis by selling "hotel bonds" through 31 August 2020, whereby a customer can buy a bond from their hotel of choice for $100 and after 60 days, the bond is worth $150[67].

Communication is Key

As businesses aim to reassure travellers that they have done everything possible to ensure high quality of service and safety, communication, and particularly marketing and positioning will be critical. Given travellers renewed interest in safety and cleanliness, businesses will not only have to implement such protocols, but communicate them in a clear and simple way, providing travellers with easily accessible, digestible, accurate, and timely information and facts and being open to answering questions to inform their decision-making. In effect, more than 55% of North American leisure travellers said that reassurance that the property is "doing extra sanitising" would be the most likely factor to persuade them to book a future vacation during the outbreak[68]. Indeed, in today's hyperconnected world, the ability to communicate quickly & effectively will significantly impact the rate at which businesses are able to regain customer trust and confidence.

WORKFORCE

Supporting Their Own

With countless Travel & Tourism professionals being put on furlough or losing their jobs during COVID-19, the sector is coming together and working tirelessly to provide financial support to these employees, through the launch of emergency funds as well as partnerships for temporary job placements. For instance, Accor launched its All Heartist Fund, allocating €70 million, or 25%, from its dividend payments to assist affected employees and partners[69], while Hyatt senior management are forgoing their salaries or taking an 80% pay cut to provide funding for the global Hyatt Care Fund which will be distributed to colleagues with pressing financial needs[70]. Similarly, many other private sector Travel & Tourism sector leaders are foregoing their salaries in 2020. Organisations such as Uber and Lyft are compensating drivers and delivery workers diagnosed with COVID-19 or ordered to quarantine by a public health agency[71], while Disney is providing full healthcare benefits for staff placed on unpaid leave[72].

To support other sectors in need of skilled workers, Scandinavian Airlines (SAS)[73], EasyJet, and Virgin Atlantic[74], among others, have re-trained qualified staff to join healthcare providers. Similarly, hospitality leaders including Hilton[75], Hyatt, Wyndham, and IHG[76] are partnering with major companies around the world that are actively hiring short-term staff to place their furloughed workforce. Destinations, such as New Zealand are taking a similar approach, which repurposed its "Go with Tourism" service to redirect tourism employees into essential work in the interim.

In these uncertain times, flexible working arrangements will likely be extended to cope with ambiguous demand and temporary reallocations to higher-demand functions or regions will be considered to minimise gaps for the eventual return to business. Majid Al Futtaim, the leading shopping mall and leisure organisation across the Middle East and Africa, has activated an employee redeployment programme which has seen more than 1,000 leisure, entertainment, and cinema employees being reskilled to join the company's Carrefour business on a temporary basis to assist with online order fulfilment, food packing, stock replenishment, and more[77]. Similarly, in China, 40 restaurants, hotels, and cinema chains optimised their staffing by sharing their employees with Hema, an Alibaba-owned "new retail" supermarket chain[78].

In addition to private sector initiatives, government measures to support the Travel & Tourism sector and its workforce will be critical in achieving a swifter recovery. Indeed, with SME's accounting for 80% of the sector, the lack of government support will likely imply that many Travel & Tourism companies will not survive the crisis.

Prioritising Wellbeing

Travel & Tourism businesses will also enhance their focus on employee well-being and mental health to address the psychological effects of the global quarantine and the large and sudden shift to remote working. In effect, in these difficult times, it will not only be important to maintain staff positivity, but also to address the impact of either having been furloughed or seeing colleagues being furloughed or let go. Accor and Royal Caribbean, for instance have established a 24-hour helpline for employees, among other programmes, while Carnival put in place an "onboard medical team" trained to identify guests and crew who might need additional resources and support. To maintain a personal connection with its employees and extend the necessary support, ITC Hotels, India's third largest hotel chain, HR Managers are each calling a minimum of ten employees daily to enquire about their health & safety and that of their family members – reaching more than 1,200 employees to date[79].

COMMUNITIES

Mutual Benefits

While the sector faces devasting losses as a result of COVID-19, it continues to prove that people, communities, and taking care of others are at the core of the sector. Peter De Wilde, President of the European Travel Commission (ETC), put it simply, *"since hospitality and love for our homes is at the core of what we do, we must support and empower local communities"*. This message has been translated into action by hospitality leaders across the globe, including Marriott, IHG[80], Radisson, the Four Seasons, and Hilton in partnership with AMEX[81], who have offered their hotels as makeshift hospitals, housing for frontline medical staff or even the homeless, while other organisations such as Caesars Entertainment, Room Mate Hotel, Palladium, Disney, Wynn, and MGM Resorts have donated food palettes to local foodbanks and charities[82]. In Bali, IHG hotel workers converted hotel linens into masks for the local communities, while Radisson donated hundreds of thousands of free meals to migrant workers in India who were stranded during the lockdown[83]. In France, hotels are also being employed to house victims of domestic violence, which has increased during the lockdown. Companies such as TripAdvisor have also made it easier for travellers to support hospitality businesses by buying gift cards and committing $1 million to support the most vulnerable populations around the world[84]. Destination Marketing and Management Organisations are also key in supporting communities, particularly those most reliant on Travel & Tourism, and therefore hardest hit by COVID-19, such as Las Vegas.

Authenticity, Perhaps Virtually

In the early phases of recovery, Travel & Tourism businesses will further develop partnerships with local communities to design authentic experiences which will be increasingly expected by travellers, or even offer these experiences virtually. Airbnb, for instance, launched Online Experiences, giving hosts an opportunity to earn an income during lockdown, whilst offering travellers local connections and experiences[85]. Experiences range from meditating with Buddhist monks to virtual visits with the dogs of Chernobyl. Similarly, the Traveling Spoon, a company that connects travellers and hosts to share 1,000+ food experiences in 60 countries, has pivoted to offer 50+ online cooking classes for hosts to earn an income[86]. In China, Bespoke Travel Company rolled out a series of programs to allow customers to partake in local experiences, including a self-guided scavenger hunt and a series of insider talks and classes via Zoom[87]. To succeed, Elizabeth Linder, Executive Director at Beautiful Destinations, noted that it will be critical *"to ensure that locals are part of the story and the ecosystem"*. To keep wanderlust alive and rally people to unite in these unprecedented times, WTTC created the successful #TogetherInTravel campaign which brought the entire sector together and reached 80 million people across social media platforms.

Hiring, Mindfully

Businesses will likely further increase their local hiring/buying practices to offer authentic local experiences to travellers but, also as a response to concerns around talent mobility. In effect, current travel restrictions may mean that non-residents will not be able to obtain a work visa[88]; whilst at the same time, potential candidates may also be more concerned about applying for work away from their homes. Steve Armitage, General Manager - Destination at ATEED, noted that having increased *"benefits and opportunities pouring into the local communities, specifically the indigenous communities, would be a win for the community and ATEED"*.

IMPLICATIONS

Cater to the Primary Demographic. Young, domestic, and less risk averse travellers are likely to jumpstart the Travel & Tourism sector through its early recovery. Destinations and businesses alike should prioritise this market segment, not only creating the right product offerings but also promoting them on the right channels. Success with this segment will set off a multiplier effect, as their positive reports will restore demand among other segments, too.

Prioritise Independence and Authenticity. The combination of crowd avoidance, and newfound appreciation for connection will lead to an increase in once-in-a-lifetime nature destination and "off the beaten path" vacations. Travellers will look for more self-mobility and self-service options, but when forced to rely on providers, they will expect greater authenticity, adventure, and local impact. Indeed, their empowered selves may even demand it.

Build Customer Confidence Online. Dreaming, planning and contingency planning are becoming increasingly important in travellers' decision-making. With information gathering primarily taking place through online channels, businesses should not only make sure their own promotion and messaging is present, but also expand access to information through innovative formats and ensure clarity around cancellation policies. Transparency and authenticity will be paramount in regaining traveller trust and business. Destinations and businesses alike will need to convey their true spirit and unique identity. Customers will be wary of stilted publicity campaigns and those businesses that may "talk the talk" but fail to "walk the walk."

Innovate to Fit. In just a few months, the Travel & Tourism sector has transformed, and businesses will need to get creative as they adapt to the next normal. While certain businesses will be able to get by with just a few physical or procedural adjustments to their operations, other business models will struggle in the face of travel restrictions and growing fear of crowds. In this new context, companies will need to identify alternative revenue-generating use cases, potentially considering how technology can offer opportunities for re-invention. Alternatively, businesses could look outside of the sector for inspiration and potential areas of demand. As innovation accelerates, testimonials will be essential to illustrate the transformation.

Sustain Employee Connection. Employing one in ten workers worldwide, the Travel & Tourism sector is all about people. Out of commitment to their staff, businesses are launching several employee protection initiatives aimed at offering financial support and access to healthcare. Facilitating mobility of employees to higher-demand locations, or temporary transfers to partners with openings, also ensures adequate capacity for eventual re-opening. Yet, it is equally important to keep employees engaged during this period to create the foundation for a smooth post-crisis transition. Looking after mental health and wellness will become increasingly important as employees confront escalated concerns about health and income, while also coping with limited social opportunities and the transition to telework.

Partner with Local Communities. Destinations have suffered significant losses as a result of the pandemic. In the short- to mid-term, direct and indirect job losses will be substantial, and poverty and economic inequality could surge as a result. The effects will be most pronounced in tourism-dependent areas, where local populations rely heavily on tourism revenue for their livelihoods and live in stark contrast with neighbouring resorts. Fortunately, there are mutually beneficial opportunities for businesses to come together with their broader communities to reinvigorate tourism and ensure a source of income for residents. Local communities will be crucial partners in designing the types of authentic, immersive experiences that travellers will increasingly demand in this new age of travel. In this new context, public-private-community partnerships will become increasingly important as destination's build on their DNA to ensure long-term Travel & Tourism readiness.



2. HEALTH & HYGIENE

Health & safety are paramount in this new era. Personal experiences, the fear of being stuck in another country and concerns for physical distancing will guide consumer behaviour in the short- to mid-term. Businesses will have to collaborate even more closely with their extended value chains, especially employees and suppliers, to ensure readiness and the implementation of likeminded protocols. In this context, trust, between travellers and employees, businesses and suppliers, and visitors and local communities, will be a leading engine in the recovery of the Travel & Tourism sector.

Health and safety on the mind

92% of consumers trust word-of-mouth recommendations from family & friends

89% of Americans are more conscious of germs now than before COVID-19

80% of travellers fear potential quarantine as much as contracting the virus

69% of travellers cite cleanliness & health measures as a critical component of travel brands' crisis response

Partnering for success

Hilton · Lysol · Mayo Clinic · United · Clorox · Cleveland Clinic

Need for destination readiness in more remote areas

	US metropolitan areas with populations of >50,000	US rural areas with populations of <10,000
Share of acute care hospitals	74%	9%
Share of acute care beds	91%	2%
Share of intensive care unit (ICU) beds	94%	1%

Source: Oliver Wyman Traveler COVID-19 Survey, Nielsen, Bradley Corporation, IATA, Society of Critical Care Medicine

TRAVELLERS

Safety First

Travellers' awareness of good practices in health & hygiene has and will continue to grow, influencing their expectations for travel. A recent survey revealed that 89% of Americans are now more conscious of germs and 90% say they are washing their hands more frequently and thoroughly than before[89]. While in a number of Asian nations face masks have been a regular fixture for years, this trend is expected to become more common in the West. Between March and April, for instance, e-commerce website Etsy saw its sales double, largely attributed to the sale of 12 million face masks amounting to $133 million[90].

Even after a vaccine becomes available, travellers are likely to remain more cautious of health issues going forward. In fact, 88% of Americans stated that they will maintain this new hand-washing regimen even after the virus has passed[91]. A report focusing on Chinese traveller consumption revealed that tourists would be more likely to seek out destinations with established infrastructure and high-quality medical facilities following the pandemic[92].

The Trust Factor

In light of growing health & safety concerns, travellers will increasingly turn to authorities they trust for timely and accurate information ahead of and during their travels. Indeed, according to Nikolay Malyarov, CEO of PressReader International *"access to quality information will become increasingly important to travellers, who will look to it for validation"*. Organisations from the US CDC[93] to the International Air Transport Association (IATA)[94] have created maps providing travellers with the latest COVID-19 entry regulations by country. By the same token, Airports Council International (ACI) is creating a COVID-19 Health Measures portal and app to enable airports to share the latest measures they have in place. According to a recent poll in the US, 69% of Americans trust CDC statements about COVID-19[95].

Destinations from British Columbia[96] to Turismo de Portugal are also working to build trust and remain relevant to tourists, equipping them with better information and facts. Joe Richardson, President and CEO of Auto Club Group, noted that travel providers and destinations alike will need to *"give travellers as much information as possible to provide peace of mind"*, with any inconsistencies eroding trust and confidence. Word of mouth marketing will be a valuable currency for destinations recognised as safe, with 92% of consumers admitting they trust recommendations from friends and family above other forms of advertising[97].

In this new era of travel, hygiene will become as important a criterion in the traveller's decision-making process as price and location, requiring providers to step up. Katie Fallon, EVP of Corporate Affairs at Hilton, concurred, noting that *"there has been a clear call to action from consumers to all big brands asking us to innovate our services in terms of health & safety"*. Yet, while 64% of travellers stated that improvements in health and cleaning of rooms and public spaces would significantly impact their decision to stay at a hotel[98], according to Paul Abbott, CEO of GBT, *"health & hygiene should not be capitalised on as a competitive advantage"*.

The Fear of Being Stuck

Even in "safe" destinations, travellers will remain wary in the short to medium term about the possibility of future outbreaks and their ability to get back home in case of a lockdown. In fact, according to an IATA survey, more than 80% of travellers were as concerned about potential quarantine restrictions as they are about catching the virus during travel[99]. This fear will likely imply a slower recovery of long-haul travel. Matthew Upchurch, Chairman & CEO of Virtuoso explained, *"the great travel depression is driven not just by the virus, but the fear of quarantine, the fear of not being able to get back home to your loved ones"*.

Travellers are also likely to avoid some of the destinations hardest hit by COVID-19, monitoring travel continuity and health infrastructure at destinations as their trip start date approaches, and cancelling or postponing in case of worrying signs. In France, a survey revealed that 37% of French travellers postponed their trips while 26% cancelled them[100]. Yet, 74% of French travellers who postponed their trip, did so for only 1-6 months. The implementation of quarantines by countries is not only have a significant impact on the affected countries' Travel & Tourism sectors but having a domino effect on other countries. Indeed, the UK's quarantine on all travellers arriving from Spain will likely lead to requests for refunds amounting to tens of millions of pounds[101]. What is more, the UK's imposition of quarantine policies could result in losses of £22 billion, equating to a loss of £60 million a day for the UK economy, due to the collapse of international travel during 2020[102].

The responses, both past and current, of destinations and business alike inform travellers' confidence in crisis preparedness, management, and recovery. According to Steve Armitage, General Manager - Destination at ATEED *"New Zealand's brand and the fact that it has been able to move quickly to eliminate the virus has created huge appeal for travellers"*. Other countries which have been successful in regaining travellers trust include Australia which developed a public-private approach and brought together stakeholders to assess future risks and rehearse response scenarios; as well as South Korea, which, in the aftermath of MERS in 2015, not only acknowledged its shortcomings but highlighted how it integrated its learnings into its emergency planning and reformed its healthcare system to respond to future outbreaks[103].

BUSINESSES

Defining New Norms

Given the importance of having global standardised protocols to rebuild traveller trust, the sector has built on past experience and proactively worked to enhance its hygiene and cleanliness standards to world-class levels, including deep cleaning, sanitation, and health screenings as needed. Richard Fain, Chairman and CEO of Royal Caribbean, stated, "there is a need to have a set of protocols so powerful that people say, 'we have confidence in going back'". In this context, organisations across industries and regions have launched their programmes all considering health, hygiene, and physical distancing in their respective approaches, from Hertz[104] and Delta[105] to Marriott[106] and The Bicester Village Shopping Collection, which designed its protocols on the basis of its positive experience re-opening its outdoor shopping centre in China[107]. Destinations have also put in place programmes and campaigns, such as Las Vegas, with its Vegas Smart initiative which promotes fun and entertainment whilst requiring travellers to be mindful of their surroundings and thoughtful of others by wearing mandatory face coverings, keeping one's distance and hand washing[108].

As Travel & Tourism businesses define new norms, they will continue to engage in strategic partnerships that will enhance their standards as well as the perception of their brands as clean, safe, and compliant with internationally-recognised protocols. Hilton, for instance rolled out its "CleanStay" programme in partnership with Lysol and Mayo Clinic[109], while IHG is enhancing its already existing programme "Way of Clean" in partnership with Ecolab and Diversey, and now Cleveland Clinic, and making it more visible to consumers[110]. Among others, United Airlines introduced its United CleanPlus programme in partnership with Clorox and Cleveland Clinic, while Airbnb implemented its Enhanced Cleaning Initiative programme designed in collaboration with Ecolab. Many destinations, including the Singapore Tourism Board and Turismo de Portugal, have also launched health & hygiene practices and certification to strive for a consistent approach and increase traveller confidence; while Visit California, deployed a Responsible Travel Code and a Responsible Travel Hub to encourage safe and responsible travel throughout the state amid the coronavirus pandemic[111].

As the sector enhances its health and hygiene standards, Travel & Tourism industry leaders agree that this is not an area to compete on, but rather one in which the sector shares best practices, lessons learnt and sets joint protocols. In this context, and to optimise the sector's recovery, rebuild confidence among consumers and ensure alignment with the private sector, WTTC developed, in collaboration with over 120 of its Members, health experts, governments and industry associations, its Safe Travels recovery protocols. The protocols which are freely available, provide the public and private sectors with the insights and toolkits for interaction and implementation to maximise traveller safety. In conjunction, WTTC created a specially designed stamp, the first of its kind, to allow travellers to recognise governments and companies around the world which have adopted health and hygiene global protocols. Major destinations and governments around the world, from Dubai to Jamaica and Portugal to Rwanda, have adopted WTTC's *SafeTravels* protocols and stamps.

Likeminded Supply Chains

Travel & Tourism businesses have already recognised that the independent implementation of emerging health and hygiene protocols is not enough, but rather an alignment and common approach is required across the Travel & Tourism supply chains. In effect, the sector has a responsibility to ensure safety across the end-to-end journey. As such, a harmonised, coordinated, collaborative, and transparent approach should be implemented by governments across the world. Increasingly, businesses will urge their partners to adopt likeminded protocols. It is expected that due to reductions in demand, businesses will have an opportunity to be more selective about their partners and require likeminded health & safety standards. Rajah Travel Corporation, for instance, is working with its suppliers to ensure compliance with global protocols by undertaking a verification process and creating a portal to offer its suppliers training and resources to ensure standards are upheld.

WORKFORCE

Protocols in Practice

With health & hygiene gaining importance, employees, particularly client-facing staff, will need to be trained and feel comfortable with the new protocols. In effect, creating a safe environment for employees will be critical. Hyatt, for instance, is introducing accreditation programmes linked to performance-based cleaning, disinfection, and infectious disease prevention[112]. Governments are also taking leadership, with the government of Western Australia launching mandatory hygiene training for all hospitality employees[113]. Alex Zozaya, CEO of Apple Leisure Group, noted that employees would be open and willing to comply with the new hygiene and health protocols, explaining that *"every time we open a new hotel, there is a lot more of an appetite to follow protocols. It's not just about the rules, but about protecting yourself"*.

Safety from Within

As Travel & Tourism businesses prioritise the health & safety of their employees, many will implement enhanced health screening measures. Hong Kong International Airport, for instance, is piloting sanitation booths to disinfect employees and read their temperature before they interact with passengers[114], while organisations such as IHG and Club Med[115] are instituting temperature

checks and health questionnaires for their staff. Technologies, such as PopID, a fever-detection and facial recognition camera service are starting to be used to recognise employees and read their temperature before permitting entry to facilities[116]. In fact, CLEAR, the biometric-based security company, is launching a similar health-screening service to take employees' temperature. In addition to temperature screenings, businesses are also adjusting staff facilities to allow for greater distancing and hygiene. Organisations including Apple Leisure Group and Wynn Las Vegas[117] have put in place back office signage reminding employees of proper hygiene, mask use, and distancing protocols, among other measures; while others, such as Marriott, are considering installing plexiglass dividers at front desks[118]. Ultimately, ensuring the coherence and harmonisation of protocols which are outcome driven, simple and practical through a coordinated, collaborative, and transparent approach, supported by medical evidence, across the Travel & Tourism sector globally is essential. Such an approach is aligned with WTTC's *SafeTravels* protocols, which put the safety, health and security of travellers and the Travel & Tourism workforce at the core of the development of its global protocols.

IMPLICATIONS

Set the Gold Standard. There is a need for the public and private sectors to come together to develop internationally-recognised health & hygiene standards relevant to Travel & Tourism. It is to support this effort that WTTC launched the *SafeTravels* protocols. For specific industries, such as aviation, ICAO created the Council Aviation Recovery Taskforce (CART)[119], which provide practical, aligned to government and industry operators to restart the international air transport sector and recover from the impacts of COVID-19. Consistent, easily-recognisable standards will serve to boost traveller confidence.

Plan for the Unexpected. In this time of great uncertainty, contingency planning has gained in importance. In effect, the stories of travellers being stranded in various locations across the globe have caused traveller anxiety. Going forward, travellers will look for reassurance that, in case of emergency, they will be able to get home. In this context, businesses and destinations alike will need to show they have learned from the past and actively built up their resilience. They will need to hone their contingency planning capabilities and ensure that robust medical and repatriation travel insurance is available to travellers.

Spread the Word. The Travel & Tourism's sector's heavy reliance on word of mouth, will remain in this new era of health & hygiene. When rolling out new sanitisation programmes or enhancing their health and hygiene practices, businesses should raise awareness of these improvements to reassure the first travellers, who will then go on to spread the word about "safe" destinations and providers to others. Traveller feedback, testimonials and recommendations will be critical to confirm that new protocols are not empty words and have significant impact.

Partner for Success. Travel & Tourism businesses cannot "go it alone" with regard to health and hygiene. Looking upstream, they are reliant on suppliers for safe handling and delivery; and looking downstream, they need partners to limit risk of contamination in their service provision. As such, businesses should aim to partner with organisations across their supply chains that have likeminded protocols.

Educate Employees. It is critical that businesses provide the tools and training to their workforce, as every employee matters in minimising the risk, both for the business and its customers. Trainings should provide a refresher on basic health and safety practices and aim to introduce new standards of excellence. Businesses can consider taking further action by monitoring and rewarding employee performance along these lines.

Ready the Destination. As travellers remain wary of crowds, they will look to new areas for vacations, with secondary, tertiary, and even rural and smaller destinations growing in popularity. This will however require swift action for destination readiness—both to protect local communities and to ensure the safety of travellers. In effect, destinations will need to develop robust health & hygiene protocols, collaborate with the local private sector, and strengthen health infrastructure where possible.



3. INNOVATION & DIGITISATION

COVID-19 is proving to be a catalyst in the Travel & Tourism sector's quest for innovation and the integration of new technologies. Amid stay-at-home orders, digital adoption and consumption are on the rise, with consumers now expecting contactless technologies, among others, as a basic prerequisite for a safe and seamless travel experience. Cybersecurity is only becoming more important, particularly as remote work becomes the norm and as identities are digitised. Time and time again, the disruption of the Travel & Tourism sector has led to a wave of innovation, followed by growth. While digitisation and innovation offers tremendous opportunities for Travel & Tourism's growth, which should be embraced, precautions are needed to make sure employees and local communities are not left behind.

Digital technologies are on the rise...

69%
of people who used videoconferencing for the first time during COVID-19 expect to continue

66%
of consumers are using less cash and moving toward more contactless solutions

45%
of air travel passengers are ready to shed their paper passports for digital identities

44%
of travellers increased their time sent browsing social media during COVID-19

...requiring changes in the sector

The workforce must adapt

89%
of Travel & Tourism companies say that the skills gap in local labour markets is a barrier to adoption of new technologies

Remote work will be normalised

33%
of travellers expect to work from home at least 1-5 days per week post-COVID-19

Communities cannot be left behind

15%
of households in Least Developed Countries (LDCs) can access internet at home versus 84% in developed countries

Source: Oliver Wyman Traveler COVID-19 Survey, RTi Reseach, Visa, IATA, GlobalData, World Economic Forum, World Bank

TRAVELLERS

Digital Boom

While digitisation has been an emerging trend within the Travel & Tourism sector in recent years, stay-at-home orders have led to digital acceleration with more consumers becoming adept at using technological solutions in everyday life including for online shopping and virtual meetings[120]. Katie Fallon, EVP of Corporate Affairs at Hilton: *"We are witnessing a digital transformation among our guest population that wasn't as digitally savvy in e-commerce and other technological aspects as they are now."* In effect, an April 2020 survey revealed that 30% of respondents used contactless payment methods and videoconferencing for the first time, with 70% and 69%, respectively, expecting to continue post-COVID-19[121]. The adoption rate of web conferencing rose by nearly 85% between January and April 2020[122]. This is not limited to younger generations, with 45% of baby boomers admitting they were shopping online more as a result of the pandemic[123]. Krista Schulte, SVP of Strategic Partnership Marketing at The Coca-Cola Company, noted that *"while the learning curve is very steep, many customers have risen to the challenge"*. This learning curve has also been embraced by businesses, according to Caroline Leboucher, CEO of Atout France, *"the pandemic has forced small companies to get online, when many did not even have websites before COVID-19. In this context, Atout France and its partner Welcome City Lab launched a call for innovative projects to boost innovation and digital transformation in the sector"*.

In this digital revolution, consumers are increasingly relying on technology from using online and mobile platforms for recommendations and travel inspiration[124] to using technologies during their travels to minimise physical interactions. A recent survey revealed that 44% of travellers have increased their time spent browsing social media[125], while another highlighted that 81% of Americans would be willing to use a hotel's mobile app to check in[126]. An increased interest in virtual or augmented realities is also taking place in trip planning and to aid businesses in connecting with a wider audience, something luxury safari company &Beyond noticed, particularly from Asian markets, since it started offering virtual safaris in the wake of COVID-19.

Contactless Convenience

COVID-19 is a catalyst for touchless technologies, which travellers will now expect to minimise their physical contact with people and surfaces. Cheryl Rutenberg, SVP Travel U.S Merchant Sales & Solutions at Visa, echoed this highlighting that *"In a time where daily habits are changing, 63% of consumers are using less cash and are opting for contactless and card payments for safety and cleanliness reasons"*. Travellers will want to decrease their contact with high-touchpoints across their journey, from viewing menus on their devices and using mobile check-in to accessing aspects of their hotel rooms through their phones.

Integrated digital solutions that enable safe and seamless travel will be fast-tracked to reduce physical touchpoints across the traveller journey. The sector will build on and aggregate existing solutions from biometric verifications and e-gates at airports to contactless payments to enhance the traveller journey and address new concerns around capturing health data and contact tracing. These concepts are not new, with WTTC proactively engaging in this space through its ambitious Safe & Seamless Traveller Journey initiative, which brings together the public and private sectors, alongside technology providers, and builds on the work of organisations including IATA, ICAO, ACI, CLIA, WEF and IBMATA, and to agree on models that are globally interoperable, technology agnostic and provide end-to-end journey coverage. Aligned with and building on the concept of document-free processes[127] there is a need to prioritise harmonised standards and processes for quick and reliable health testing and tracing, if required, particularly before a vaccine becomes available, as we aim for consistent and seamless travel experiences.

Still, travellers remain cautious about cyber risks and data privacy; something which has become apparent with the emergence of contact tracing apps. Although most Australians supported the country's contact tracing initiative, only 16% downloaded the COVIDsafe app a week after its launch, with 80% citing privacy concerns regarding data ownership and access[128]. In this new context, the use and protection of data will remain an ongoing concern for travellers and will likely become more prevalent as more data is used for both convenience in the travel journey and in the determination of where travellers can go using digital health information.

BUSINESSES

Acceleration of Digitisation

In response to demand, businesses will adapt and fast-track their digital transformation[129] from touchless technologies to automated services across the traveller journey including the integration of connected rooms, contactless check-in[130], digital car keys, and delivery robots, among other technologies[131]. As new business models emerge to adapt to the changing market needs, the sector will focus on *"automating the predictable so it can humanise the exceptional"* according to Matthew Upchurch, Chairman & CEO of Virtuoso. Thinking about the airport of the future, Paul Griffiths, CEO of Dubai Airports, noted that a distributed airport experience with travellers getting into pods as they go through necessary checks may be developed in the future, effectively reducing the number of traveller touchpoints.

Digital identity and biometric identification will become increasingly important. According to IATA, 45% of passengers are ready to discard their paper passports and use biometric identification instead[132]. This research is aligned with WTTC's consumer research which reveals that on average 4 in 5 travellers would be willing to share their picture in advance of travel to facilitate their journey in Europe and the USA, for domestic and international travel. In this context, IATA, supported by ACI, has developed its One ID project which proposes the creation of a single biometric token as the digital identity of a passenger, with no need for a physical passport as travellers go through traditional touchpoints. This shift towards digital identity and the use of biometrics has been supported by numerous private sector organisations. For instance, Delta created the world's first biometric terminal in Atlanta in collaboration with US CBP[133], while Royal Caribbean Cruises implemented biometric technology to streamline check-in and boarding. It is expected that more touchless options will emerge for identity verification, including contactless fingerprints, iris and facial recognition[134], as well as gesture control and touchless document signing. More broadly, organisations such as IATA and ACI are working on building the air travel journey of the future, through the NEXTT initiative, by improving and streamlining the travel journey and adopting new and emerging technologies, including improved data processing.

The sector will also experience an acceleration, particularly in the short term, of innovations in health & safety, ranging from thermal imaging to electrostatic sprayers. Emirates has already implemented thermal screening measures for all passengers travelling on US-bound flights[135] while Etihad Airways is trialling a range of contactless, self-service technologies that can gauge a passenger's vital signs and allow for touchless, virtual health screenings at airport kiosks and bag drops[136]. Organisations ranging from Marriott[137] to InterContinental and United to Southwest[138] are all integrating electrostatic spray technology for disinfection. UV-powered disinfection robots are also entering the marketplace, already used by more than 400 hospitals for no-touch cleaning and disinfection[139]. For instance, Lindblad Expeditions, an adventure cruise company, who will have the first self-disinfecting fleet[140].

The accelerated adoption of web conferencing in both the personal and professional spheres during COVID-19, will support the recovery of Events as the industry pivots from having a majority of physical events to a hybrid model. The transition to a hybrid physical/virtual model will enable the events industry to become stronger in the middle-term by acquiring a whole new audience. The Chief Executive Officer of Cvent, Reggie Aggarwal, highlighted in an interview that he expects to have 4,000 in-person attendees at Cvent Connect 2021 and an additional 30,000 virtually[141]. The shift will also provide sponsors and exhibitors with significantly more exposure, including not only the 500 people in physical attendance, but the other 1,500 virtual attendees.

The Rise of Virtual Tourism

Businesses and destinations alike will continue to adapt to the changing times, even offering virtual experiences as they work to re-inspire wanderlust in travellers and restart the sector. National parks such as Yellowstone[142] and over 2,000 museums and archives from around the world, in collaboration with Google Cultural Institute[143], have already gone online through virtual reality. In a similar vein, many hotel chains, restaurants and even airlines have begun to share classic recipes online to connect with travellers by reminding them of favourite treats, like United Airline's delicious stroopwafels[144]. Destinations such as Switzerland Tourism with their "Dream Now, Travel Later"[145], Tourism Ireland with "I will return"[146] and Tourism Portugal with "Can't Skip Hope" among many others, continue to engage with travel lovers, giving them inspiration to explore their destination once travel restrictions lift and people can travel safely. The rise of virtual tourism is a trend that will endure, becoming an increasingly important part of the sales and marketing process. The Bahamian Ministry of Tourism, for instance, has been hosting virtual sales programs in the US & Canada for business partners and suppliers, including virtual trip simulations and live social media sessions[147].

Threat Prevention

A combination of factors, ranging from new technologies and the proliferation of fraud to the implications of remote working, will escalate cyber-risks for the sector and its customers. Given that the biggest threat will likely come from remote work and the use of remote connections, businesses will prioritise the protection of consumer data accordingly and guard against major data breaches at a time when trust is paramount. According to Paul Griffiths, CEO of Dubai Airports, *"defence and investment against cyberattacks needs to intensify irrespective of COVID-19"*.

As businesses work to find ways to ensure cybersecurity, they may decrease their liability by outsourcing to third-party specialists for decentralised data solutions. In a recent US survey of 1,000+ enterprises across 21 industries, 82% of respondents stated that they want hybrid or multi-cloud options to spread any risk from their cloud investments[148]. Simultaneously, businesses will need to adapt to the changing legislation aimed at protecting personal information such as the General Data Protection Regulation (GDPR) in the EU and EEA and the Protection of Personal Information Act (PoPI) in South Africa.

WORKFORCE

Shifting Skillsets

Digital transformation will imply an increased demand for employees with a digital or technical skillset, though people and soft skills will also remain key. Yet, in these uncertain times, companies will prioritise retention, and upskilling their existing employees, over recruitment. According to a World Economic Forum survey, 68% of the Travel & Tourism workforce will require reskilling[149]. To respond to this need, many businesses and destinations, from Deliveroo[150] and Radisson to Dubai Tourism[151], have swiftly adapted, offering online courses, such as business & data, innovation, coding, and web development, among others, to enhance the skills of their workforce. In addition to the e-courses offered by their employers, employees will also increasingly take part in independent upskilling programmes to increase their value in the job market, with an anticipated growth of the e-learning market of over 8% annually between 2020 and 2026[152].

Remote Work Normalised

Like many other sectors, Travel & Tourism experienced a rapid increase in remote working, a trend that is here to stay. A recent global survey by Oliver Wyman found that 33% of respondents plan to work from home for 1-5 more days a week post COVID-19[153]. What is more, some companies will choose to move certain back-office roles off-site entirely to contain real estate and other associated costs. In fact, a recent cross-sector survey revealed that 74% of companies will make at least 5% of their workforce remote, and 23% said they will move at least 20% of their workforce to permanently remote positions; 13% had already made cost reductions in real estate expenses as well[154]. As a result, many client-facing roles will also evolve as travellers seek to limit personal contact, giving rise to technologies from in-app concierge services to delivery robots, such as those used by Ele.me to deliver meals to quarantined individuals in a hotel[155].

In this new context, employees may choose to relocate from congested cities to more remote locations, with a recent consumer survey noting that nearly 40% of US adult urban dwellers would consider moving towards rural areas[156]. The expansion of remote-work policies will also have implications in terms of hiring; enabling employers to hire worldwide and employees to avoid living in high-cost or urban areas[157]. While this more flexible set-up may benefit the productivity of some employees, it may be a more challenging emotional adjustment for others. In 2015, a randomised trial of 1,000 employees by Trip.com revealed a 13% increase in productivity and a 50% drop in employee voluntary departures[158]. Still, when offered the choice to work from home, only 50% volunteered.

COMMUNITIES

Digital Divide & Development

Digital inequalities, both between developed and developing nations but also within countries, have been exacerbated by the fall-out from COVID-19, enhancing the already existing divide. In effect, only 15% of households in the least developed countries have access to internet at home compared to 84% in developed countries[159]. Mature destinations will further benefit from the resource disparity, drawing on existing digital infrastructure to increase the use of technologies, such as contactless payments[160] and even contact tracing; and in turn, enhancing their ability to attract travellers and putting remote destinations at a disadvantage. Moreover, business continuity, particularly with remote working, is more complex in rural areas as households may not have reliable internet connectivity. These trends highlight the need for governments to roll out the next generation of information and communication technologies and ensure these are accessible to all with support from the private sector.

As the sector works to bridge the digital divide, local communities need to be part of the story and local knowledge and innovations should be embraced. Such an approach will be key for travel, particularly with the projected growth of community-based tourism by 10% before 2023, growth which will likely be enabled by online experiences. For instance, Tanzania's Tourist Board worked with key industry players including conservation authorities to launch a digital media platform on wildlife[161]. Creating opportunities for and with local communities and providing developing destinations with financial and technical assistance will be important. Kenya-based mobile giant Safaricom, for instance created Pesa as an innovative solution to address the lack of access to financial services in rural areas, and allow residents to purchase goods, disburse salaries, pay taxes and grant recipients, among others activities[162]. This mobile money service has now expanded into six more countries in Africa with over 37 million active users[163].

IMPLICATIONS

Expand Digital Presence. As travellers increasingly turn to mobile and online channels as their primary source of information, businesses will need to cultivate an active, real, and consistent online presence. Customers will expect a variety of options for engagement, from websites and apps to social media, including business presence on crowd-sourced platforms. Businesses should focus on developing robust social media strategies to remain relevant, facilitate further engagement, build and nurture trust, and even help expedite problem solving.

Accelerate the Move to Touchless. Businesses will need to accelerate the integration of digital and touchless technologies for a faster recovery. In this context, businesses should seek partnerships with likeminded providers across the traveller journey to enable the most safe and seamless experience. A leaner and more agile approach to the development and deployment of technologies will be key to remain competitive and meet traveller expectations.

Personalise Delivery. An accelerated digital environment is fertile ground for innovation in business and better personalisation for travellers. Upon consent, traveller data can be utilised for customisation, potentially powered by Artificial Intelligence. It will also be essential for providers to use digital channels to create connected experiences both online and offline. Businesses that successfully marry digitisation with the industry's long-standing reputation for customer service and connection will achieve lasting customer loyalty across generations and segments.

Invest in Cybersecurity. The threat of cyberattacks is heightened for the sector in an increasingly digitised world. Even for businesses that adopted leading digital technologies and cybersecurity before COVID-19, the switch to remote work poses additional risks. Not only is enhanced cybersecurity needed to combat emerging fraud and data breaches, but the very adoption of new technologies is dependent on customer trust in business capabilities to protect their data. Businesses will benefit from cross-sectoral collaboration to formulate international standards for optimal cybersecurity and data privacy.

Accommodate Remote Work. A few trends are coalescing into increased reliance on remote work, namely, the continued health and safety concerns about communal working environments, intensified cost pressures, and the rise of secondary, tertiary, and even rural travel destinations. As a result of COVID-19, some employees will have had a taste of remote work and uncovered newfound efficiency and appreciation for remote work. Others will be eager to return to the office for social stimulation and their own productivity. Either way, employers will need to embrace flexibility in working arrangements and prepare for the potential emotional and practical implications of remote work on the workforce.

Digitise the Workforce. The outbreak has demonstrated the importance of an adaptable and technology-enabled workforce, including an adjustment to remote work as a new norm. Businesses will need to develop internal technical and digital capabilities to adapt to increasingly digitised operations within the sector. Significant investment in employee recruitment, reskilling, and upskilling is needed to attract, develop, and retain highly skilled talent. Retention efforts will also be important to ensure minimal leakage of top assets.

Enable Non-Traditional Destinations. Government support will be needed to ensure that emerging destinations have adequate resources to re-activate tourism and adapt to evolving demand. In effect, digital infrastructural investments and effective destination marketing strategies will be key to attract tourism. While, businesses should play a role through the digital upskilling of the local workforce, public-private-community partnerships will be central to ensuring the sustainable and inclusive growth of these destinations.



4. SUSTAINABILITY

From widespread unemployment and anti-racism movements, to the restoration of natural habitats, the world has been re-invigorated to tackle social, environmental, and institutional sustainability. In particular, heightened public awareness of wildlife markets and poaching has boosted advocacy for wildlife protections. Businesses and governments are facing growing scrutiny, not only of their environmental track record but also of their support for diversity and inclusion. This is the time for the Travel & Tourism sector to seize the moment and enact meaningful changes that will transform the world and make a lasting difference for future generations.

73% of consumers are taking note of brands that are making a difference during COVID-19

Environment

58%

of consumers say they are thinking more about the environment since COVID-19

8% decrease in global CO2 emissions expected for 2020

Wildlife

78%

of conservationists have been negatively impacted by COVID-19

50% drop in conservation jobs compared to normal levels

Equality

2,000+

global cities held anti-racism protests inspired by George Floyd

1,785% spike in Yelp searches for black-owned businesses

Employment

121M

global Travel & Tourism jobs are estimated to be lost during the pandemic

68% of the Travel & Tourism workforce requires re-skilling

Source: Oliver Wyman Traveler COVID-19 Survey, WTTC, Publicis Sapient, International Energy Agency, Mongabay, Vox, Yelp, World Economic Forum

TRAVELLERS

Environmental Caution

The human toll on the environment has come into focus, as improvements in air quality and pollution have been observed while the world has been on pause, from blue skies in Kathmandu and clear waterways in Venice to stingrays in Dubai. The global lockdown caused a decline in transport use, electricity demand, and industry activity, in turn leading to an 8% forecast reduction in CO2 emissions in 2020, the largest fall since the Second World War[164]. Moreover, for the first time in history, US oil prices went negative in April 2020[165]; with global oil demand forecast to drop by 9% with consumption at 2012 levels[166]. During its nationwide quarantine[167], China experienced a 40% year on year drop in nitrogen dioxide in January and February[168], equating to removing 190,000 cars; as well as an 11.4% increase in "good air quality days across 337 cities.

Yet, despite the clear skies and clean air, the negative impacts of having travel come to a standstill cannot be underestimated. Indeed, there have been devastating social, economic, and environmental impacts resulting from the lack of Travel & Tourism during COVID-19. There has, for instance, been an increase in illegal poaching and fishing in reserves as people are trying to survive and provide for their families, having lost their livelihood. In effect, sustainable tourism plays a key role in sustaining and preserving natural habitats and protected areas, with research suggesting that wildlife tourism contributed $344 billion to the global economy in 2018.

This recognition of the collective responsibility of humankind is expected to trigger a renewed interest in environmentally-conscious and responsible travel, particularly in sustainable and eco-tourism; requiring a balance moving forward. Consumers will also place increased scrutiny on Travel & Tourism brands to reduce their environmental footprint, including the use of water, energy, and waste. According to a Publicis Sapient survey, 58% of respondents said they are thinking more about the environment and sustainability now compared to before the COVID-19 pandemic began[169]. As travellers increasingly demand the greening of tourism and an alignment with their values, there is an opportunity to recognise companies and destinations on their sustainability quotient and ESG performance.

Wildlife Preserved

With media focusing on the connection between wildlife trade, habitat disruption, and pathogen spread[170], travellers have gained greater awareness of global wildlife issues. According to the US CDC, 75% of new or emerging diseases infecting people originate in animals[171]. The pangolin, which many scientists have linked to the COVID-19 outbreak, is protected under international law, but is still one of the most illegally traded mammals on the planet, with an estimated 1 million sold in the last 15 years[172]. Green crime, which includes illegal wildlife trade and environmental crime, is effectively valued as a $260 billion industry and is growing at 7% annually[173]. COVID-19 has, however, been a wake-up call to governments around the world. China has, for instance, fast-tracked a ban on the trade and consumption of wildlife[174], while Australia has called on world leaders to ban wildlife markets and grant WHO broad powers to investigate a disease outbreak[175].

During the lockdown, animals have increasingly been observed in areas typically busy with people, from kangaroos on the streets of Sydney and wild goats in North Wales to dolphins in Venice[176] and lions on golf courses in South Africa[177]. According to UN Secretary-General Antonio Gutteres, *"Nature is sending us a clear message. We are harming the natural world, to our own detriment".*[178] As a result of COVID-19, people are becoming more aware of the value of nature and wildlife and the need to steward these resources, which is expected to lead to more demand for close-up and purposeful experiences with nature. As travellers wait to be able to travel once again, virtual eco-tourism and safaris have already seen heightened interest as a temporary solution, with South African company WildEarth experiencing a five-fold increase in viewership of free live safaris in the first two weeks of March alone[179].

Spotlight on Equality

With the disproportionate impact of COVID-19 on racial and ethnic minorities and the rise of anti-racism protests worldwide, awareness of social justice is heightened. According to data from the US CDC, there is a heightened burden of illness and death among racial and ethnic minority groups, with death rates for black people being 92.3 per 100,000 population in New York City, compared to 74.3 for Hispanics, 45.2 for Caucasians and 34.5 for Asians[180]. Similarly, in the State of Sao Paulo in Brazil, people of colour are 62% more likely to die of COVID-19 than their Caucasian counterparts[181]. The UN High Commissioner for Human Rights, Michelle Bachelet, attributes the causes to marginalisation and discrimination, economic inequality, overcrowded housing, environmental risks, limited availability of healthcare and bias in the provision of care. Furthermore, the economic impacts of COVID-19 is also disproportionate for people of colour. In effect, the number of African-American owned-businesses in the US dropped by 41% from February to April 2020, compared to 32% for Latino-owned, 26% for Asian-owned, and an overall average of 22%[182].

A global movement has simultaneously emerged against racism and police brutality, following the May 2020 police killing of George Floyd in Minneapolis. The world is now paying attention and has a new level of consciousness to this important problem, with over 1 billion social media interactions in the month following Floyd's death[183]. Protests have taken place in 2,000 cities across the world, from New York to Seoul and Tel Aviv to Nairobi, leading to outcomes ranging from the implementation of additional

controls on police actions to the removal of public monuments tied to slavery and racism[184]. As a catalyst for intercultural dialogue and tolerance, the Travel & Tourism sector can play an important role in further driving social inclusion, mutual understanding, and respect between individuals.

Indeed, the high participation of women and minorities in Travel & Tourism, particularly when compared to other sectors, enables the sector to contribute to the socio-economic empowerment and non-discrimination of vulnerable group, providing opportunities for workforce participation, leadership, and entrepreneurship. In effect, women account for 54% of employment in the sector compared to 39% for the global economy[185], and has twice as many female employers than other sectors[186]. In the US, the leisure and hospitality sector ranked third in terms of share of industry employment that is of Hispanic and Latino ethnicity and fourth in terms of black or African American representation in 2018[187].

BUSINESSES

Public Scrutiny

Climate change and broader environmental shifts witnessed during the global lockdown will put further public pressure on the Travel & Tourism sector to advance the sustainability and societal agenda. In fact, according to a Publicis Sapient survey, 66% of respondents said they would be more likely to purchase from an airline that had enhanced its sustainability efforts, and 73% claimed they were paying attention to brands making a positive impact during the crisis[188]. This statement was echoed by Katie Fallon, EVP of Corporate Affairs at Hilton, who noted that *"greater scrutiny on the sector, including from an ESG perspective, for climate and destination stewardship post COVID-19 is expected, and we will welcome it. The sector has a very important role to play in mitigating climate risk on travel destinations globally, and we will need to work together to ensure that as we reinvent a lot of our businesses, we keep sustainability front and center."*

The sector is already seeing governments enact regulations which require businesses to reduce their environmental footprint and adopt more sustainable practices, with a number of industry bailouts conditional on climate action[189]. For instance, Austria's government agreed to a financial support package contingent on sustainability requirements for Austrian Airlines, including the halving CO_2 emissions by 2030 and increased jet fuel efficiency[190]. It is expected that products and experiences that have sustainability and resilience at their core, will receive more funding from governments and investors going forward.

Nevertheless, businesses will struggle to balance the competing priorities of sustainability and cost management during the economic downturn. According to Luis Araujo, CEO of Turismo de Portugal, *"the global economic damage of the pandemic, people will focus on economic survival, rather than prioritising sustainability during the recovery".*

WORKFORCE

Multi-Skilled Workforce

COVID-19 has had a significant impact on the sector's workforce, with over 121 million jobs and $3.4 trillion in global Travel & Tourism GDP being lost within the sector according to WTTC's forecast[191]. Looking at regional job losses, the Asia-Pacific region is expected to have 69.3 million impacted jobs for 2020, followed by the Americas with 19.2 million and Europe with 18.4 million. Travel supports 1 in 10 jobs on the planet, and created 1 in 4 new jobs globally in the last five years. Yet, according to the US Travel Association, unemployment within Travel & Tourism in the US has reached 51%, twice that of the worst year during the Great Depression[192]. Unfortunately, to date the majority of governments have not provided support packages to the extent necessary for the Travel & Tourism sector, neither for small and large organisations, nor their workers.

Looking ahead, the workforce will need to be more flexible, potentially working across functions when needed, in turn requiring an increase in cross-training. Federico Gonzalez, President and CEO of the Radisson Hotel Group, highlighted the *"importance of recognising the training needs for the next one to two years, and the need to train people in different jobs than they were doing before".* As such, as the sector moves towards recovery, training and educational resources will be put in place to facilitate upskilling and create a more resilient workforce. Destinations from Singapore to Portugal[193] are providing subsidised or even free training and capacity building to Travel & Tourism professionals. The Singapore Tourism Board, in fact, partnered with technology players including Facebook, Google, and LinkedIn to develop web-based trainings for the tourism industry[194]. Similarly, Travel & Tourism businesses have significantly improved access to online training, both for employees and those who were temporarily furloughed, to enhance opportunities in the future.

COMMUNITIES

Crowd Moderation

To avoid popular and potentially crowded locations, businesses and destinations will develop more remote offerings and promote non-traditional destinations. Darrell Wade, Chairman of Intrepid, noted that *"the outbreak can be used by the Travel & Tourism sector to spread tourism wider and make it more sustainable"*, publishing an annual "Not Hot List of Alternatives to Overtouristed Destinations"[195]. From Australia to Greece and Israel to Italy[196], destinations are all developing and promoting alternative markets and destinations, with Thailand focusing on the promotion of 55 emerging destinations[197], an initiative which is also intended to generate jobs in rural areas.

Yet, the growth of alternative destinations will require a shift from solely allocating budget for promotion to significant spending on sustainable and inclusive tourism planning and management. Destination-readiness will be essential to ensure the long-term sustainability of local communities as well as cultural and natural assets. For highly vulnerable destinations, authorities may consider limiting capacity. For instance, to ensure Boracay remained a pristine destination following its rehabilitation, the government of the Phillipines reduced the number of rooms on the island as well as the number of day-trips to the island. Cities, from Copenhagen to Paris and Berlin to Athens[198], are also establishing micro-mobility corridors to become more attractive and liveable. In fact, in 2018, Lonely Planet ranked Copenhagen as the top city to travel to for 2019, while European expats rated it as the top city to live in. While spreading tourism and managing crowds will be key, Travel & Tourism should not become an exclusive, high-priced experience for a few, but remain one that many experience.

Digital solutions will increasingly be integrated to support in the management of crowds and physical distancing within top attractions, such as theme parks and museums. Shanghai Disneyland, for instance, launched a virtual queue system to encourage physical distancing with the Disney Standby Pass[199]; while a number of Italian museums have implemented electronic devices worn as lanyards which vibrate and light up if guests are standing too close to one another[200]. Other options to support crowd management include timed digital ticketing, dynamic pricing linked to demand, as well as mobile products such as GetYourGuide's "Beat the Crowds" which collects wait times and occupancy levels in real time through sensors and uses this data to forecast waiting times, and warns customers of which areas to avoid[201].

Protection Against Poaching

Unsurprisingly, COVID-19 has been devastating for conservation programmes, given this segment's significant reliance on sustainable Travel & Tourism. In effect, in 2018, 85% of South Africa's funding for the country's wildlife and public land management authority came from tourism-related sources such as park entry fees[202]. A survey of global conservationists in March-April 2020 highlights this with 78% of conservationists stating that they have been negatively impacted by the pandemic[203], including lay-offs, frozen donations or funding cuts, cancellations of seasonal crews and the inability to fully perform job responsibilities. Ol Pejeta, a Kenyan conservancy and sanctuary for the endangered black rhino, expects to lose 70% of its anticipated business this year[204], income that goes directly into conservation efforts. In 2016, it was estimated that for every night that a tourist stays at a high-end wildlife lodge in a remote part of Southern Africa, up to 14 people in the surrounding community benefit indirectly from that income, in addition to those who benefit directly[205].

With several programmes unable to operate, local communities, nature, and wildlife are at risk. As tourism-dependent communities are suffering from economic hardship, some are turning to illegal fishing[206] and poaching protected animals[207], such as tigers, rhinos, orangutans, and deer, for food. A South African rhino rescue organisation stated that it faced one poaching incident every day since the national lockdown began[208]; leading to increasing concerns that the conservation efforts of the past decade will be lost[209]. In effect, animals are not just protected by the reserves and rangers, but also by the presence of tourists and tour guides.

As the Travel & Tourism sector recovers, a renewed interest in conservation activities and renewed resources for effective action are expected, given the increased appreciation for nature, animals, and the great outdoors[210]. Nicole Robinson, CMO of &Beyond, echoed this sentiment explaining *"with one vehicle and a camera, we are able to impact how many more people think about how nature works, and perhaps how they can impact sustainability going forward".* While travel to these destinations is on hold, reserves are turning to virtual conservation to inspire, connect travellers to important wildlife conservation issues, and even create platforms to fund relief for the local communities and protected wildlife. The Nature Conservancy, for instance, is raising money for cash-strapped parks, conservancies, and private reserves in Africa to help pay for rangers and guards[211], while companies such as Brave Africa have launched a crowdsourced fundraising campaign in partnership with the Victoria Falls Anti-Poaching Unit[212].

IMPLICATIONS

Promote Eco-Destinations. The outbreak has increased environmental awareness among consumers. As travellers seek to make a positive difference when travelling, sustainable tourism will become more prevalent. Destinations that protect nature, or offer an insider view into wildlife, will attract a steady following. As such, businesses should develop their portfolio of natural destinations and highlight their ecological benefits or minimal impact guarantees to inspire traveller inflows. Moreover, conservation activities may become a necessary complement to tourism business in at-risk areas to offset any harmful impact.

Ingrain Sustainability in DNA. The COVID-19-induced lockdown offered clarity on the significant human impact on the environment. With renewed calls to action, sector players will face growing pressure from the public to adopt more sustainable practices. Successful businesses will focus on the full ESG spectrum, addressing not only environmental concerns but also corporate governance needs and social impact in local communities. In effect, in recent years, social impact has moved to the top of the agenda, taking its place alongside environmental sustainability. In this new context, governments will be pushed to act and put in place policies to drive change.

Enrich the Talent Pool. This crisis has shown the need to have a multi-skilled and technologically-adept workforce. Moreover, the transition to remote work has opened up the potential to hire top talent from anywhere in the world. Businesses will need to target a diverse skillset among employees to plan for workforce continuity and re-allocation in case of future shocks. Investments in digitally upskilling the workforce, cross-training employees in wide-ranging topics, or recruiting and retaining digital talent worldwide will be money well spent.

Leverage Technology for Good. Technology can facilitate the delivery of effective and more sustainable tourism solutions. Digital solutions can, for instance, be used to monitor and collect data on nature, wildlife, and environmental conservation work; and digital platforms, especially social media, can be used to promote awareness and build support for various sustainability initiatives worldwide. Moreover, the few destinations which are at risk of overcrowding can further integrate technologies for tracking and better distributing large volumes of travellers.

Manage Traveller Flows. Governments have a key role to play in ensuring travel continuity and tourist access in the wake of the crisis. Particularly for tourism-dependent or emerging tourism areas, transparency about protocols and border restrictions is needed. And as travellers begin to and eventually return to tourist hotspots, crowd moderation will become essential, especially until a vaccine is found. Indeed, governments may even initiate capacity limits on some sites to minimise impact, while also enforcing physical distancing.

Engage Local Communities. Collaboration with local communities is key to ensuring sustainability in the broadest sense and for the long term. Community participation in crisis preparedness, management, and recovery can also enhance the resilience to future shocks. Together, businesses and governments should seek to engage with local communities to tackle these complex issues and promote sustainable living. Given that a "one size fits all" solution does not exist; it is critical to engage local communities in the planning process to jointly define how to achieve their goals as a destination. Moreover, businesses can further engage the communities in which they work by prioritising local employment initiatives.



SECTION III: POLICY RECOMMENDATIONS



1. MAKE IT THROUGH THE CRISIS

REDUCE THE GUESSWORK

Coordinate Border Openings and Ensure Repatriation

International cooperation is critical to ensure the effective restart of the Travel & Tourism sector. Governments should both coordinate amongst themselves and collaborate with the private sector to harmonise the timing of the lifting of travel restrictions as well as standardise contact tracing and testing requirements. An international framework establishing clear rules, processes and standards is crucial for the sector to resume and bring back the millions of jobs impacted. The communication of such policies should be consistent. Moreover, with travellers now fearing the possibility of being stuck abroad, governments will need to provide reassurance through mutually-agreed protocols. To address this need in the short-term, regional hubs or "travel bubbles" are emerging, with the Baltic nations of Estonia, Latvia, and Lithuania being the first European nations to agree to open their common borders[213]. International collaboration between governments is also needed urgently to ensure that international travel may be reopened and recover as early as possible. Having such clear-cut coordination not only strengthens business continuity but also enhances consumer confidence and incentivises people to travel.

Define Common Health & Safety Standards

The public and private sector should come together to jointly agree on the implementation of health & safety standards across industries within Travel & Tourism. It is paramount to have common protocols that ensure coherence and consistency through a collaborative and transparent risk-based approach supported by medical evidence; an approach WTTC has taken through the development of its Safe Travels protocols. In effect, such an approach will lessen the traveller's burden of having to verify protocols from various sources and enable a safer and more seamless end-to-end journey. Whilst maximising the health and safety of travellers, the sector's workforce, and the local community, health and safety protocols must be practical and minimise disruption and costs as much as possible to enable business continuity across geographies, particularly for SMEs which account for 80% of the sector. It is in this context and with these objectives that WTTC created its SafeTravels protocols across industry verticals within Travel & Tourism. Providing businesses with a recognition of their compliance to such protocols may further boost travellers' confidence in Travel & Tourism. For instance, Turismo de Portugal created the "Clean & Safe" seal and received WTTC's *SafeTravels* stamp to be able to distinguish businesses that fulfil hygiene and safety requirements established by the government for travellers[214]. Destinations from Cancun to Slovenia and Panama to Cape Town have also all been recognised as destinations who have adopted WTTC's *SafeTravels* protocols. It is important that health & hygiene measures be limited in time and re-evaluated and reduced as the risk diminishes.

Prioritise Destination Readiness

Governments will be instrumental in providing support to destinations, large and small, as they prepare for recovery. A coordinated multi-stakeholder approach that brings together the public sector with the private sector and the local community will be required in re-establishing operations and implementing effective policies when re-opening. In the current context, such plans will need to consider how to enhance the existing traveller journey experience by adding health components and integrating new technologies. The adoption of global health and safety protocols will also be essential in re-building traveller confidence as well as the continued support from government for the sector's recovery. In addition to focusing on existing tourism hubs, particular emphasis should be placed on ensuring that secondary, tertiary, and even rural destinations, are equipped to accommodate future traveller inflows, while also ensuring safety of residents and visitors alike. Many Destination Marketing and Management Organisations are planning ahead, with Auckland Tourism, Events, and Economic Development (ATEED), for instance, having developed a "Destination AKL Recovery Plan" which includes 25 recommended actions such as the expansion of city-wide transportation and the expedited opening of new attractions to ready Auckland for future tourism[215].

Expand Testing Availability

Governments need to ensure sufficient and swift testing capacity for COVID-19, not only to minimise the spread of the virus, before a vaccine is readily available, but also because it is a prerequisite for travellers to feel safe and comfortable. In this context, governments will need to invest resources to ensure they have an appropriate quantity of tests readily available at an affordable price, with high accuracy and with an acceptable turnaround time, of 90 minutes or less for results. What is more, it will be essential for governments to recognise the test results from other countries, thereby enabling passengers to be tested on departure and not again on arrival. Such an approach will require the creation of an international framework and standards. Until a vaccine is widely accessible, tracing technologies should be considered and implemented to identify those who may have come in contact with an infected person during travel. South Korea, for instance, attracted attention for its relative success in fighting the virus, with free, ten-minute tests being conducted at walk-in or drive-thru clinics across the country, and a digital contact tracing scheme sending automated text message alerts to anyone who may have been exposed to the virus[216]. Securing efficient test and trace options across the traveller journey will inevitably require collaboration with the private sector.

GIVE BUSINESS A BOOST

Implement Enabling Policies for Business

As businesses adapt to the next normal, they will likely have little to no revenues through these changes. As such, stimulus packages will be needed for Travel & Tourism, supporting the sector as the financial and automotive industries were prioritised and assisted during the 2008 financial crisis. With increased support, the Travel & Tourism sector will be able to restore and bring back the millions of jobs impacted. Explicit political and financial commitment from governments, such as the implementation of Travel & Tourism stimulus packages, with support to both large businesses and SMEs, will be essential to enable the sector's survival. Government policies could include liquidity measures such as reduced lease payments, repayable advances, loan forbearance, moratorium on penalties, and reduction of advance tax payments. Governments can also offer more targeted support such as financing for the health and safety upgrades that are now required to maintain operations amid heightened standards. Trinidad and Tobago is, for instance, offering grants to hoteliers to upgrade their facilities, as well as VAT and income tax refunds for SMEs, and credit union loans at reduced rates and with extended repayment periods[217].

Promote Destinations in Need

Once destinations have been able to contain COVID-19 and are ready to welcome visitors once again, governments should direct their attention and resources to destination promotion to help boost demand. Early efforts should specifically target tourism-dependent areas which have been most affected, such as Las Vegas or Orlando in the United States. Governments could collaborate with local DMOs to develop a joint strategy to stimulate recovery. Destination Canada and Destination BC, for instance, announced a multi-million-dollar partnership to support the community DMOs in British Columbia most impacted by COVID-19 travel restrictions[218].

SUPPORT OUR PEOPLE

Facilitate Short-Term Workforce Mobility

With over 121 million jobs being impacted according to WTTC, amounting to nearly a third of all Travel & Tourism jobs on the planet; governments have an important role to play in facilitating the short-term reallocation of staff, both within the sector and beyond, to mitigate the impact of furloughs and lay-offs. Initiatives such as official upskilling programmes to move out-of-work staff into positions for which there is heightened demand, have been implemented by multiple countries. For instance, Indonesia accelerated the launch of its pre-employment card programme, to focus on three tourism-focused regions, namely North Sulawesi, Bali, and Riau Islands[219]. To address skills shortages, the programme covers the costs for job seekers and laid-off workers to participate in a broad range of trainings. Another example is that of Atout France, France's national tourism development agency, which established a centralised job platform to connect out-of-work staff with companies actively hiring, including outside of the sector[220].

Strengthen Worker Support Schemes

Employing over 10% of the global workforce, Travel & Tourism is a sector with people at its core. While businesses are doing their utmost to take care of their own, the mounting cost pressures faced by so many companies can make payroll an impossible feat, resulting in increased incidence of furloughs and lay-offs. Governments can play a pivotal role in the provision of payroll protections and wage subsidies, as well as general consumer stimulus cheques and tax payment deferrals. The government of Singapore, for instance, introduced several worker support schemes targeting the Travel & Tourism sector, including, providing licensed independent tour guides with S$1,000 in wage support over three months, waiving tour guide license renewal fees, and offering funding to cover 75% of wages for a period of nine months for employers in the aviation and tourism sector[221]. France also adopted strong worker protection measures, dedicating €8.5 billion to the funding of short time working /partial unemployment measures, with the government fully reimbursing partial unemployment for wages up to €6,927 euros gross monthly, i.e. 4.5 times the minimum wage.



2. ADAPT TO THE NEW NORMAL

A NEW BEGINNING

Co-Create with the Private Sector

While the sector has been discussing for years the importance of crisis preparedness, management and recovery, it is clear that the world was not prepared for COVID-19. Still, this crisis has provided an opportunity for change in the sector and hopefully enhanced readiness for future crises. To ensure future preparedness and alignment across the sector, governments should strengthen their engagement with the private sector, sharing key learnings from this crisis, jointly defining and implementing measures for future crisis mitigation and implementing a modus operandi on how to better collaborate on issues relating to resilience. It is important to ensure that policies implemented are long-termist and not driven by a party or the term of a government. Indeed, given that abrupt policy changes can be detrimental to planned business, regular touchpoints should be scheduled between policymakers and the business community to ensure that the impact on the sector is taken into account, whilst enabling the private sector to take mitigating actions for business continuity. For instance, in Australia, public and private sector actors, including the government, the federal police, emergency services, and Qantas, regularly come together to consider future risks, discuss challenges, design business resilience frameworks, and develop and rehearse response scenarios. Such platforms, bringing together the local and global private sector on a regular basis, should be implemented by governments to create consistency and enhance resilience over time.

Promote Tourism, Starting with Domestic & Regional

Domestic tourism will be the first segment to recover, followed by short haul regional, then medium haul between regions and, finally, international travel. To capitalise on the initial recovery, governments, tourism boards and tourism organisations should direct their early marketing and promotional efforts to incentivise domestic and regional travel and inspire residents to explore nearby destinations and attractions. Such an approach has been taken by Saudi Arabia, where the Saudi Tourism Authority announced plans to prepare the longest recreational tourist path in an effort to promote domestic tourism[222]. Shopping outlets, rest houses, outdoor activities, and discounted hotels and restaurants are also planned along the path, which will stretch from north to south. Importantly, governments, tourism boards and organisations should also prepare and provide early marketing and promotional incentives to stimulate the earliest possible regrowth and recovery of internal travel and tourism.

Incentivise Travel

To activate demand, governments should offer early consumer incentives for travel spending, starting with domestic travellers and expanding regionally and internationally as quickly as possible and appropriate. These measures can be used alongside direct marketing to incentivise travel in the short term, particularly while travellers may still be wary of travelling. Consumer stimuli could include specialised insurance, subsidised holidays off from work, guarantees for medical care while travelling, as well direct cash or voucher subsidies for holidays. This approach has been successfully employed in Thailand, which launched the "Thailand Travel Shield" following the 2014 political crisis to provide online insurance with coverage for civil unrest[223]. Most recently, in response to COVID-19, the Thai government announced a domestic travel subsidy programme, providing 40% subsidies on domestic accommodations, food and attractions, as well as air travel[224]. The South Korean government, on the other hand, opted to expand its "vacation bonus subsidy" programme to encourage local tourism by providing employees of small companies with vacation bonuses partly subsidised by the government through a prepaid debit card[225]. The highlighted domestic initiatives should be scaled up to international incentives as well, as exemplified by Cyprus. In effect, the Cypriot government announced a guarantee programme, through which it will cover the holiday costs of any tourist who contracts the virus while on holiday in the country, excluding airfare and airport transfers[226]. Governments should also consider exploring the implementation of a four-day working week and three-day weekend, as a means to boost productivity, whilst incentivising travel during extended weekends and boosting consumption to accelerate recovery[227].

LEAP INTO DIGITAL

Facilitate Seamless Coordination

Given the pressing health & safety concerns around face-to-face interactions and hygiene, cross-sectoral players will need to convene to accelerate the move to a more seamless and contactless end-to-end travel experience through enhanced technologies. In this context, the implementation of technologies, including touchless, will be key to a swift recovery. In view of the complexity of these issues involving sensitive data, significant investment, and the cooperation of several sectors and countless individual players, it is essential that governments engage meaningfully and prioritise this issue by, for instance, providing a timely platform for knowledge sharing and the development of strategic partnerships. As the sector fast-tracks this transition, it should build on pre-existing knowledge and initiatives such as IATA's air-focused One ID[228] and the World Economic Forum's Known Traveller Digital Identity, which the WTTC's Safe and Seamless Traveller Journey brings all together as it expands to the entire end-to-end journey.

Integrate Digital Identities

In light of the increasing focus on health & hygiene, governments will need to identify solutions to digitise health information and integrate it as a seamless component of cross-border travel, together with experts and market innovators. In this context, accelerating the adoption of digital identities and solutions will be key to maximise accuracy for health & safety protections, while reducing bias in border control and expediting the movement of passengers. To ensure consistency and uniformity, governments should align, as much as possible, with other countries in their use of digital identity, as per ICAO guidance, and the implementation of biometrics passports. Taiwan, for instance, was swift in leveraging digitised health information in responding to COVID-19, drawing on its health insurance, immigration, and customs databases for a big data approach[229]. QR codes and online self-reporting of symptoms and travel history were also used to classify incoming travellers into infectious risk levels, such that low-risk passengers received a pass to clear immigration faster, whereas high-risk passengers were ultimately tracked through their mobile devices for the duration of their quarantine.

Spotlight Cybersecurity

Cybersecurity is becoming increasingly significant, particularly with digital adoption accelerating, and digital identities & digitised health information becoming more mainstream. These shifts will require governments to protect traveller data, while encouraging businesses to be proactive in the implementation of cybersecurity measures and guidelines, including for instance the use of biometric-related technologies to reduce cyber risks. Governments should aim to raise awareness around key cyber-risks facing the sector and share knowledge and best practices across stakeholder groups. The U.S. Department of Homeland Security, for instance, convened a Cross Sector Coordination COVID-19 Pandemic Recovery Working Group to address emerging risks to critical infrastructure, including the transportation sector[230]. In addition, the Cybersecurity & Infrastructure Security Agency (CISA) has been sharing cyber alerts, insights, and guidance for US businesses during the pandemic, while continuing to make its "cyber hygiene" services available to organisations nationwide[231].

Extend Digital Infrastructure to Rural Destinations

The adoption of digital solutions, such as touchless technologies may be challenging, particularly for remote and rural locations which often lack the prerequisite connectivity and financial resources; which in turn, may hamper efforts to attract visitors compared to more mature destinations. Proactively addressing such digital inequalities will ensure they are not further exacerbated, especially in the early phases of tourism recovery. It will be important for governments to invest in the digital infrastructure of emerging destinations and remote areas, as well as to enhance digital skills within local communities. In Colombia, for instance, the Ministry of Telecommunications partnered with SkyNet to boost connectivity services in regions of the country with the highest incidence of COVID-19 and the lowest internet penetration rates[232], while the investments of Telefonica and Telmex in Spain and Mexico significantly enhanced connectivity in smaller cities. A combination of Wi-Fi hotspots and broadband internet for local hospitals has led to improved telemedicine, enabled remote working, and enhanced social communications, whilst the government continues promoting tourism in these remote regions.

RE-IMAGINE WORK

Sponsor Mental Health

COVID-19 has induced a considerable amount of fear and anxiety for citizens around the world. Not only have countless businesses come to a standstill and many employees been furloughed or laid off, but an unprecedented number of people have been feeling isolated and fearful of being exposed to the virus. As a sector with people at its core, it is important for the Travel & Tourism sector to prioritise mental health policy and address the societal implications of the pandemic. Governments should promote education around emotional wellbeing and provide targeted programmes to assist those in need. The Ministry of Public Health in Lebanon, for instance, designed a national action plan for the Mental Health and Psycho Social Response to COVID-19[233], to promote mental health and reduce stigma through social media, provide mental health support to those in quarantine and first responders, and ensure continuity for those citizens already enrolled in mental health services.

Re-Think the Workplace

The rapid shift to remote work induced by COVID-19 has transformed the workplace of the future, effectively reducing the need for physical workplaces beyond the short term. This transition will require the public and private sectors to come together to determine how to optimise the new working arrangements. Governments will need to consider the implications should companies reduce or even stop investing in large corporate offices, as well as mitigate the potential consequences for cities, as employees consider relocating to areas with lower costs of living. To thrive in this "new workplace", it will be important to collate and disseminate remote working learnings and recommendations across the sector. For instance, the UAE government established a remote national work policy, which outlines recommendations for employers and employees to optimise remote working[234].

Forge Partnerships for Upskilling

Governments should promote multi-stakeholder partnerships, the sharing of knowledge, as well as best practices as they expand upskilling and re-skilling programmes to ensure the Travel & Tourism sector's workforce is future-ready. Training opportunities, addressing both current and anticipated needs, should not only prioritise current employees but also those who have been recently furloughed and laid off, and perhaps, even individuals who have expressed an interest in the sector. Among others, the public and private sectors should focus on digital skills as well as soft skillsets such as emotional intelligence, communication, creativity, agility, and critical thinking. Destinations such as Cancun and Seville are providing training to local employees and the local community, while the government of Chile is hosting free online webinars and trainings for tourism stakeholders, including tourism entrepreneurs, focusing on digital skills and topics related to post-crisis reinvention[235].



3. CULTIVATE RESILIENCE

PROTECT PEOPLE, WILDLIFE AND THE ENVIRONMENT

Establish Sustainability Guidelines

Governments and destinations should capitalise on the renewed interest in sustainability, and build on the Paris Climate Action agreement, to establish sector-wide and industry-specific guidelines that will further enhance wildlife and environmental protection through engagement with the private sector and local communities. Already a priority for the sector, Travel & Tourism continues to make progress and remains committed to make bold climate and sustainability leadership choices, with an ambition to be climate neutral by 2050. Intrepid, for instance, achieved carbon neutrality ten years ago, while Dallas Fort Worth International Airport is the largest carbon neutral airport in the world, using 100% wind energy and renewable natural gas in its bus fleet and reducing its carbon emissions by 80% and energy costs by nearly a third over the last 7 years. Over the past decade, Hilton reduced energy use by 22%, carbon output by 30%, water use by 22% and waste by over 30%; while Iberostar works tirelessly to eradicate single use plastics, address food procurements and the impact of washing products across its hotels.

To support the sector in raising awareness, putting in place and implementing collective actionable plans, to address sustainability, WTTC signed a partnership with both UNFCCC and UNEP, and organised its first global Travel & Tourism Climate & Environmental Action Forum in September 2019 in New York City. Looking ahead, and employing a multi-stakeholder approach, the sector will continue capturing best practices in sustainable management, ecological preservation, and wildlife conservation, as well as develop guidelines to facilitate more sustainable strategies and operations. Governments could adopt international or national guidelines as prerequisites for a sustainability recognition or could consider a public platform to evaluate and monitor sustainability. This increased focus on sustainability, effectively provides the sector with a unique opportunity to take the sustainability agenda to the next level.

Ban Wildlife Trafficking

Governments should enhance surveillance and tracking of wildlife traffickers, ultimately aiming to impose a ban on the cruel practice. To drive forward this important issue, partnerships with both non-profits and businesses should be fostered to jointly promote a comprehensive approach to address wildlife trafficking. While stringent policies are needed, businesses and NGOs are key to reporting and enforcing trafficking restrictions on the ground. In this context, the global initiative to "End Wildlife Crime" was created to encourage States to fill serious gaps in international law by advocating and supporting the creation of a new global agreement on wildlife crime and amend existing wildlife trade laws to include public health and animal health in the decision-making[236]. In response to COVID-19, the Chinese government, for instance, announced a temporary ban on wildlife trade in January 2020, suggesting a connection between the outbreak and wildlife markets[237]. China will also improve laws on wildlife protection and strengthen enforcement responses to combat the trafficking of wild animals.

Eradicate Human Trafficking

With over 40 million individuals subject to human trafficking and modern slavery in 2019 alone, a lot more can be done in the implementation of tangible solutions to counteract and even prevent human trafficking from occurring. To address this critical issue, raising awareness at the governmental, industry and consumer level is essential. It is proven that the more we know, the more we can do to prevent this crime. The UK's Modern Slavery Act, for instance, which was established in 2015, created a new statutory defence for slavery or trafficking victims compelled to commit criminal offences and enables private sector transparency by requiring big businesses to make public their specific efforts to ensure that slavery and human trafficking are not taking place in their businesses or supply chains[238]. Education and training, both for employees and travellers alike, remains a priority to better identify and report suspected cases. Beyond awareness and training, governments have a critical role to play in enacting and enforcing legislation which recognises human trafficking as a crime through the entire supply chain and develop the resources and support needed, including national hotlines. Egypt's Ministry of Tourism, for instance, conducted inspections of hotels to ensure compliance with regulations to prohibit the entry of children vulnerable to sex or labour trafficking. Enhanced support is also needed to provide victims of human trafficking with assistance, employability, training and opportunities for re-integration into the workforce. Ultimately, strengthening public-private partnerships and creating a forum for collective action will be essential to move closer to the ultimate goal of eradicating human trafficking.

Stimulate Sustainability Practices

To encourage the implementation of sustainability measures within the private sector, governments should develop and provide incentives. Financial incentives can, for instance, enable enduring operational cost savings for a business or even limit the environmental footprint of the entire sector. Incentives offered have historically included, tax breaks, insurance premium discounts, concessional loans, or grants for a variety of sustainability upgrades. In the UK, for example, the Non-Domestic Renewable Heat Incentive (RHI)[239] provides financial support in the form of a quarterly payment for twenty years to any businessowner, across sectors including Travel & Tourism, that has put in place renewable heat technologies.

NURTURE THE COMMUNITY

Amplify Local Voices

Public private-community partnerships should be bolstered, ensuring that local communities have a prominent voice and role in the development of the local Travel & Tourism sector. In effect, it is mutually beneficial to engage all stakeholders in the development of long-term inclusive and sustainable tourism strategies. One model for such partnerships is through local tourism councils, which not only facilitate local engagement, but also help boost destination stewardship as local communities drive action for preservation of cultural and natural assets. The Canadian region of Thompson Okanagan, for instance, embarked on the implementation of a regional tourism strategy in 2012, which was produced through consultations with 1,800 stakeholders and gained endorsement from all affected communities, including 33 indigenous First Nations groups. Representing 4,500 local businesses and emphasising sustainability and holistic destination management, the strategy successfully increased tourism throughout the year, with businesses earning 80% of their revenues over 110 days, compared to just 45 days six years prior, thanks to the greater diversity of products and experiences offered by the destination.

Showcase Lesser-Known Destinations

With travellers progressively favouring journeys "off the beaten path", governments have a unique opportunity to promote lesser-known destinations, which would not only broaden the spread of Travel & Tourism's economic benefits beyond hotspots, but also address existing concerns associated with crowds. In this context, targeted destination marketing strategies should emphasise emerging destinations and highlight smaller, lesser-known operators within these destinations. The region of Veneto in Italy, for instance, is planning to leverage lesser-known UNESCO World Heritage sites to draw visitors away from Venice[240]. As governments expand the benefits of Travel & Tourism beyond traditional destinations, they should also ensure the Travel & Tourism readiness of their destinations.

Protect the Traveller

A key issue during COVID-19 for businesses, was the sudden demand for refunds came at a time of extreme liquidity strain and limited cashflow, with many simply unable to provide refunds immediately. As the public and private sectors integrate the learnings from COVID-19, the standardisation of treatment across operators should be considered to ensure consistent consumer protection across the Travel & Tourism sector. Potential solutions to be examined include allowing the use of vouchers in place of cash refunds, offering funding to businesses for travel-related compensation, or even setting up an intermediary state fund for consumer guarantees. Greece, for instance, implemented a policy allowing Travel & Tourism businesses to reimburse customers for cancelled reservations using vouchers instead of cash refunds[241]; while the UK enhanced traveller protection through the government backing of the ATOL protection scheme, ensuring that passengers who accept refund credit notes for cancelled holidays as a result of COVID-19 will be protected even if the company they have booked with later collapses[242].

FOSTER THE WORKFORCE

Hire Remotely

With remote work, remote hiring becomes an imminent possibility. Employees across sectors, including Travel & Tourism, could now be hired from other regions and countries. A dispersed workforce, however, triggers new realities in terms of payroll, benefits, taxes, as well as immigration. Intergovernmental agreements may, for instance, be required to determine which jurisdiction owns the employment contract and tax revenues. In addition, governments will have to consider introducing policies to provide clear guidance to businesses and facilitate seamless employment opportunities. In the past, many countries, from the US and Mexico to Switzerland and France, have negotiated related tax treaties to account for the unique status of expat or cross-border commuters. Treaties, such as the US-Mexico treaty, defines where taxes should be paid in these cases, sets up the basis for tax credits to prevent double taxation, and outlines protocols for information sharing[243]. Long-standing tax treaties like these may need to be re-designed to account for remote work going forward. Government policies should also be revisited to include flexibility for temporary visas for certain types of employment, to enable the hiring of summer workers to support the Travel & Tourism sector.

Be Diverse and Inclusive

The disproportionate impact of COVID-19 on ethnic and racial minorities has heightened the urgency to tackle significant disparities as well as systemic discrimination. As such, governments should promote and implement policies to further enhance diversity and equity. Given the higher representation of minorities in the Travel & Tourism sector compared to other sectors, Travel & Tourism has tremendous potential to continue engaging and making a bigger difference and helping countries and destinations through socio-economic empowerment of minorities, from employment and leadership to connecting people of diverse cultures and backgrounds through travel. A leading example of such efforts is the newly-created Black Travel Alliance[244], which was launched at the onset of COVID-19 but grew in the wake of George Floyd's killing, with an aim of holding destinations and providers accountable for diversity in the sector. Governments, destinations, and businesses alike can not only drive change

through their own institutions but contribute to such groups financially and even engage them in industry decision-making. By connecting people around the world, the Travel & Tourism sector can be a powerful engine to create a more understanding and inclusive world.

Strike a Balance in Labour Regulations

Establishing the right balance of protection and flexibility in labour regulations is essential to maximise employment opportunities with the Travel & Tourism sector. Governments should examine their policies to ensure that they are flexible enough for employers to feel comfortable hiring, but, equally, that workforce protections are in place to cushion employees against any unexpected crises. Creating such a balance between flexibility and protection, will require a consultative approach with both the private sector and unions. France, which is known for its labour protections, took early but measured actions to give businesses more financial leeway through the economic downturn. For instance, it implemented a "partial activity" indemnity which reimburses employers at 100% for employee payments of 70% of gross compensation for suspended or reduced hours[245]. The government simultaneously extended the deadline for payment of profit-sharing agreements and ruled that businesses can oblige employees to take paid holidays and increase working hours for essential activities.





LOOKING FORWARD

While the road ahead may appear uncertain; we anticipate that the challenges along the way can and will be converted into opportunities by the Travel & Tourism sector. The sector will pivot, stretch, and adapt and ultimately return stronger.

The sector's success will be dependent on all its key stakeholders, from governments and businesses, to employees and destinations, including local communities and even travellers, proactively coming together and supporting Travel & Tourism.

Through our **To Recovery & Beyond** report, we identified the trends already gaining traction and explored the shifts that may be required to sustain Travel & Tourism into the future. Reflecting on these often-intertwined macro-trends, their implications for the sector, and the associated enabling policies required a number of high-level principles emerged.

First, greater cooperation is essential: between and within governments; between government, the sector, and local communities; and within the sector itself. Disparate groups will need to work together to ease the burden on the traveller; with public-private-community partnerships as a key to success. In effect, as an interconnected ecosystem bringing together numerous industries, international coordination is crucial for the sector's survival. While many countries have been working independently, the only way forward to recover the millions of jobs lost during this crisis is a coordinated approach which provides meaningful support for the Travel & Tourism sector.

Through this transition, individual competitive advantage should take a backseat to restoring travellers' overall sense of safety and comfort in Travel & Tourism. In this new context, transparency in communications will become even more important. Consumers are online more than ever before, and will increasingly be looking for detailed, trustworthy information before they travel next. Businesses, destinations, and governments alike should aim to share regular updates in a simple and engaging format to reassure prospective travellers, thus rebuilding traveller confidence.

Agility must become the sector's ethos in this period of uncertainty. Businesses and destinations will need to accelerate from initial concept to product launch in record time to cater to evolving demand and sustain revenues.

Although the recovery of Travel & Tourism has started start domestically and regionally, it is essential to re-open international travel as swiftly as possible to ensure the sector's recovery. While the creation of an international framework for testing and tracing as well as testing on departure will be key in the short-term; the sector will need to rapidly pivot and create new protocols and frameworks once a vaccine becomes available. Ultimately, such an approach will enable the sector to remain an architect of job creation with tremendous social benefits and impact that makes a lasting difference to the millions of people whose lives and livelihoods depends on it.

As the sector navigates these difficult times, we pledge to support Travel & Tourism in achieving a full recovery, and hope that this body of work can provide inspiration and guidance. We ourselves are encouraged by the ingenuity shown by the sector over the past few months, and trust that the actions taken today are important building blocks for the long-term resilience of Travel & Tourism.



ACKNOWLEDGMENTS

The Future of Travel & Tourism report is published by the World Travel & Tourism Council and Oliver Wyman.

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