

What are the trends in Travel & Tourism that are emerging during the Covid-19 pandemic and ...
How can the Portuguese tourism Accommodation's ecosystem adapt to the changes and become competitive in the post Covid-19 world?

Market Research Field Lab

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A Work Project, presented as part of the requirements for the Award of a Master's degree in Management from the Nova – School of Business and Economics, under the supervision of Professor José Miguel Pita

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Overall Agenda – Structure and Questions

Module	Section	Research Questions
Context Analysis: The “Old Normal”	1. Travel & Tourism: Overview	<p>How important is the Travel & Tourism sector for the economy?</p> <p>1.1 What is the impact of the Travel & Tourism industry in the world?</p> <p>1.2 How important is Travel & Tourism for the Portuguese economy?</p> <p>1.3 Why do tourists choose Portugal?</p>
	2. Accommodation’s ecosystem analysis	<p>How important is the Accommodation’s ecosystem for Travel & Tourism in Portugal?</p> <p>2.1 How has the evolution of the accommodation industry in Portugal been characterized over time?</p> <p>2.2 What are the main means of transport and the channels that tourists use more frequently in Portugal?</p> <p>2.3 What are the transforming trends that are appearing in the Accommodations’ sector?</p>
Covid-19: The Situation Now	3. The virus’ impact	<p>How has Covid-19 impacted the Travel & Tourism sector and the Accommodations’ ecosystem?</p> <p>3.1 What happened to the Travel & Tourism sector in 2020?</p> <p>3.2 How Covid-19 affected Travel & Tourism in Portugal?</p> <p>3.3 What happened with the Accommodations?</p>
	4. Emerging trends	<p>How did the consumer preferences changed and how are the Accommodation suppliers adapting?</p> <p>4.1 What are the factors that stand out in terms of consumers and suppliers?</p> <p>4.2 How did the measures implemented by the sector influenced the choice of accommodation?</p> <p>4.3 How has the sector been able to survive during the pandemic?</p>
Path Forward: The “New Normal”	5. Lasting trends	<p>From the analysis done, what structural changes will impact the Accommodation’s ecosystem?</p> <p>5.1 From the analysis done, what structural changes will impact the Accommodation’s ecosystem?</p> <p>5.2 How can the Accommodation’s managers adapt and prepare for the lasting trends post-Covid-19?</p> <p>5.3 What are some of the best practices of tourist accommodations in the world?</p>
	6. Scenario Forecasting	<p>How will the Accommodation’s managers adapt their strategy in order to succeed in the “New Normal”?</p> <p>6.1 What are the future scenarios that will lead the recovery of global travel?</p> <p>6.2 Are the Accommodation’s managers ready, willing and able to implement changes?</p> <p>6.3. What should be the priority of the measures to implement?</p>

Disclaimer – Roadmap and expectations

Dimensions

	Timeframe		
	Module I	Module II	Module III
	Past	End of 2019 January 2020	December 2020 Q1 2021 Years to come
Structure	<ul style="list-style-type: none"> • T&T sector • Accommodation's Ecosystem • Transforming Trends 	<ul style="list-style-type: none"> • Impact of Covid-19 • Survey Analysis • Emerging Trends 	<ul style="list-style-type: none"> • Lasting Trends • Scenarios for recovery • Recommendations for the Sector
	Variables		
	<ul style="list-style-type: none"> • GDP • Employment • Tourism revenues • International Tourist Arrivals • Number of guests • Overnight stays • RevPAR 	<ul style="list-style-type: none"> • GDP • Tourism revenues • International Tourist Arrivals • Number of guests • Overnight stays • RevPAR 	<ul style="list-style-type: none"> • International Tourist Arrivals • GDP • Confidence Index • Covid-19 Vaccine efficacy and coverage • Net Optimism
Challenges	Wide selection of different secondary data sources; difficulty in narrowing down the key information	Constant updates; new information every week; not possible to collect all the information until December 2019	Unpredictably of the future; divergence of opinions; complexity of forecasting
Main Takeaway	Importance of Tourism for social and economic development	Discovering the emerging trends Covid-19 helped to form	Which emerging trends can become lasting trends and change the sector for the future



How is the situation during Covid-19?

Covid-19: The Situation Now

"Travel & Tourism is facing unprecedented challenges and an existential threat from the impact of the COVID-19 virus globally. It is essential that governments (...) ensure that Travel & Tourism is sustained through the crisis so that it can fulfil its vital role as a significant catalyst of global economic recovery and growth."

Gloria Guevara Manzo, President & CEO
World Travel & Tourism Council

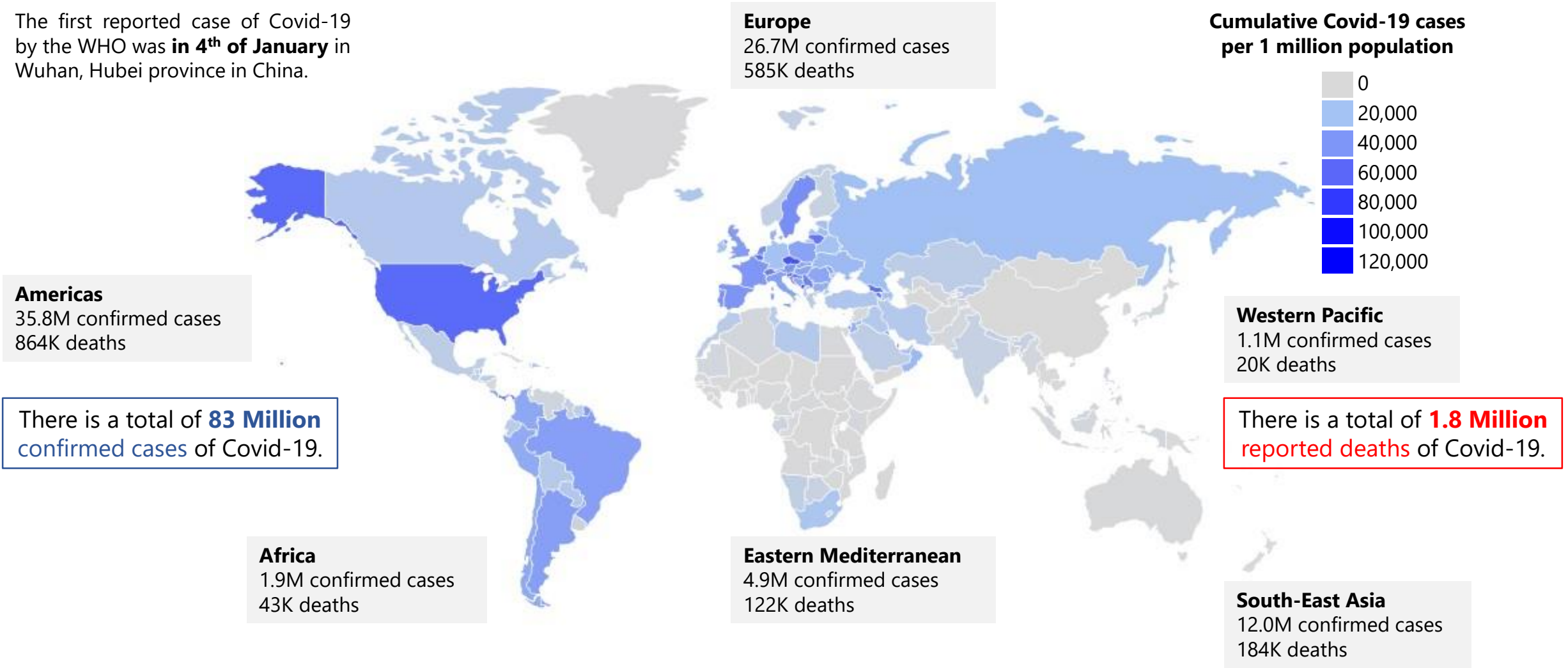
Executive Summary – Covid-19: The situation Now

Section	Subsection	Follow-up questions	Methodology
3. The virus' impact	3.1 T&T: a Global Crisis	<p>How has Covid-19 impacted the T&T industry and the Accommodations' ecosystem?</p> <p>What was the impact of the Covid-19 pandemic in the international tourism panorama?</p> <ul style="list-style-type: none"> • Covid-19 brought the world a never seen health, social and economic emergency • International travel dropped 70% from January to August in 2020 • The recovery of International Tourism has been slow due to imposed travel restrictions <p>What was the impact and how did the pandemic evolve in Portugal?</p> <ul style="list-style-type: none"> • Over 2020, Portugal started and has finished with very restrictive measures • Despite the huge crash, Portugal had more foreign arrivals than other European countries <p>How has Covid-10 been impacting the demand per type of accommodation?</p> <ul style="list-style-type: none"> • Tourist Apartment has suffered the biggest crash • Algarve has been the region with the major negative impact • In April, RevPAR dropped abruptly and only had a slow recovery during high season 	<p>Secondary Data research: WHO, UNWTO, Banco de Portugal, Travel BI, INE.</p>
	3.2 T&T: Covid-19 impact in Portugal		
	3.3 The impact in the Accommodation's ecosystem		
4. Emerging trends	4.1 The Covid-19 Traveler & Supplier	<p>How did the consumer preferences changed and how are the Accommodation suppliers adapting?</p> <p>What is the profile of the respondents in terms of consumers and suppliers?</p> <ul style="list-style-type: none"> • More than half of the people have travelled despite Covid-19 • Leisure was the most common reason for travelling • Rural Tourism presented the best results in terms of occupancy rates <p>How has the sector adapted and been impacted by new travelers' behavioral change?</p> <ul style="list-style-type: none"> • Covid-19 created a more demanding traveler especially in terms of safety • The choice of accommodation, transport and channel have suffered changes in behavior • The measures adopted by accommodation impacts the consumers' choices • Establishments had to reformulate their daily operations <p>How is the sector being able to survive and reinvent to this new normal?</p> <ul style="list-style-type: none"> • Establishments are restructuring recruitment processes and demanding new skills • Government financial support has been crucial for the sector's survival 	<p>Primary Data: Survey</p> <p>Secondary Data research</p>
	4.2 Behavioral Change in the Sector		
	4.3 Reinvention of the Sector		

The Covid-19 virus spread throughout the world causing an unparalleled health, social and economic crisis

As of 2nd of January 2021, the World Health Organization reported a total of 83 million confirmed cases of Covid-19 and 1.8 million deaths

The first reported case of Covid-19 by the WHO was **in 4th of January** in Wuhan, Hubei province in China.



There is a total of **83 Million** confirmed cases of Covid-19.

There is a total of **1.8 Million** reported deaths of Covid-19.

Note: the information was retrieved from <https://covid19.who.int/> on the 2nd of January 2021, at 18:15 GMT, Lisbon

Source: WHO

International Tourist Arrivals dropped 70% from January to August 2020 compared to the same months of 2019

700 million fewer tourists travelled during 2020 as governments closed borders and implemented travel restrictions in order to contain the Covid-19 pandemic

International Travel suffered a drop of 70% of International Tourist Arrivals and a loss of 730 billion USD, compared to the same period of 2019



International Arrivals

-700 million tourists



Revenues from International Tourism

- 730 billion USD

8 times the loss of the 2009 Global Economic Crisis

Year-to-date Change (%)

-70%



International Tourist Arrivals by month in 2020 (% change):

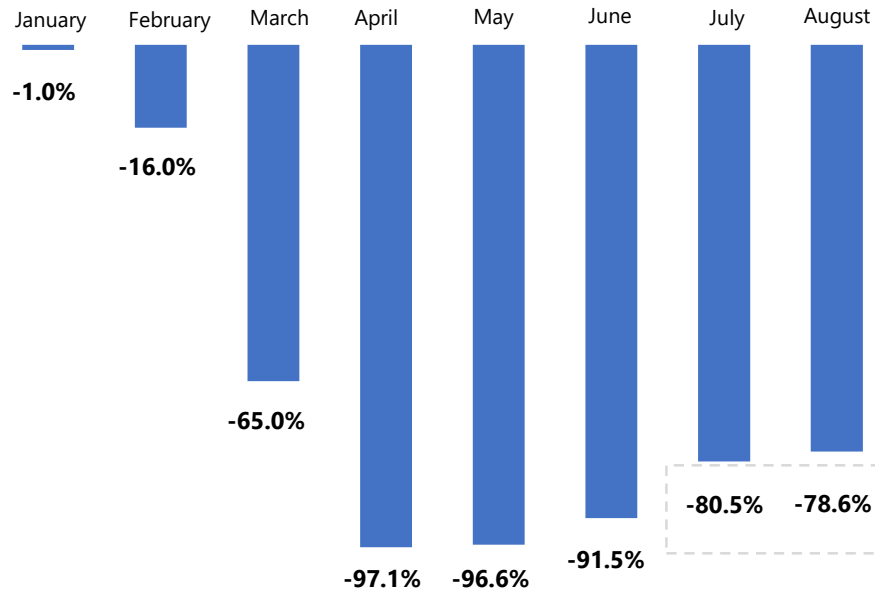


Figure 37: International Tourist Arrivals change by month relative to the same period in 2019, on a global level (in %). Source: UNWTO

Source: UNTWO

Asia and the Pacific, the first region to be affected by Covid-19 was the region with the highest drop of International Tourist Arrivals

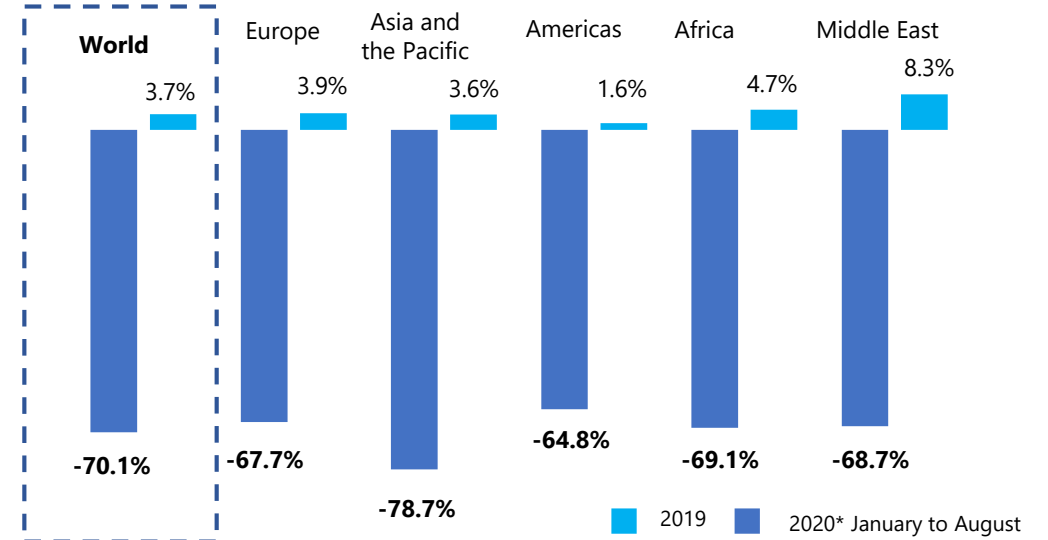


Figure 38: Year-to-Date change of International Tourist Arrivals by region (in %). Source: UNWTO

➤ Asia and the Pacific suffered the highest drop of International tourist arrivals in July and August of 96% because the major destinations of the regions such as **China had its international borders closed**

- International Tourist Arrivals fell by 81% and 79% in July and August. Historically, these are the busiest months of the year for Travel & Tourism.
- There was a small recovery during July and August because **travel restrictions were lifted** in some European countries and other few destinations. However, quarantine and other restrictions were reintroduced alongside the second wave of Covi-19 cases after summer

Based on the first 8 months of 2020, the Covid-19 pandemic is becoming the worst crisis for international Travel & Tourism to date

Travel restrictions, slow virus containment, low consumer confidence and poor economic environment are slowing down the recovery of international tourism

It took 10 months for the International Tourist Arrivals to have positive growth after the 2009 Economic Crisis, 6 months after the September 11th and 5 months after the SARS pandemic. Based on the first 8 months of 2020, the Covid-19 pandemic is becoming the worst crisis for international Travel & Tourism to date.

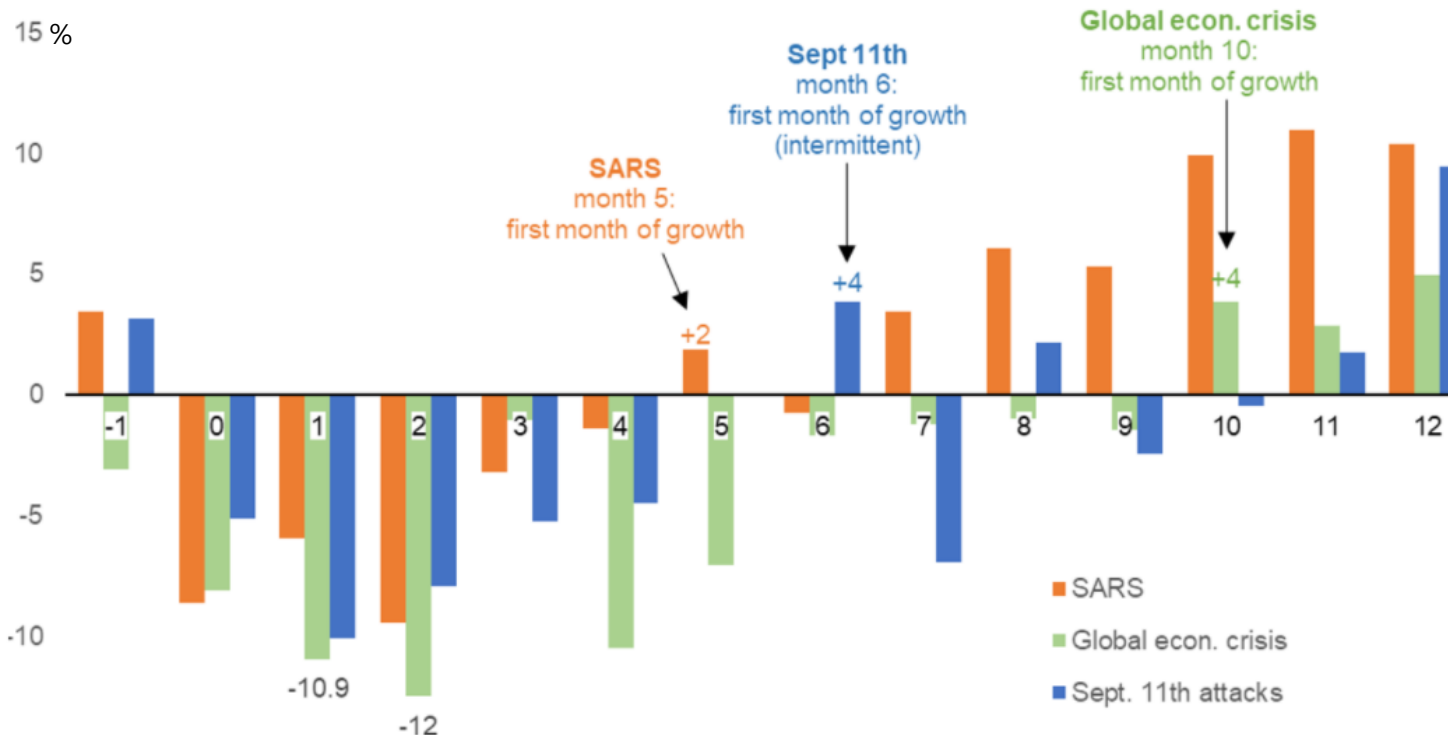


Figure 39: Impact of different crisis on International Tourism (in %). Source: UNWTO

Note: Month 0 for SARS is March 2003, Month 0 for Sept 11th crisis is September 2001, Month 0 for Global Economics Crisis is January 2009.

! The latest travelling trends point towards a **75%** decrease in International Tourists Arrivals for September 2020 and a fall of **70%** for the whole 2020.

A survey conducted between July and August of 2020 to UNWTO experts showed that **travel restrictions** is the principal barrier that is slowing down the recovery of Travel & Tourism, followed by **slow virus containment** and **low consumer confidence**.

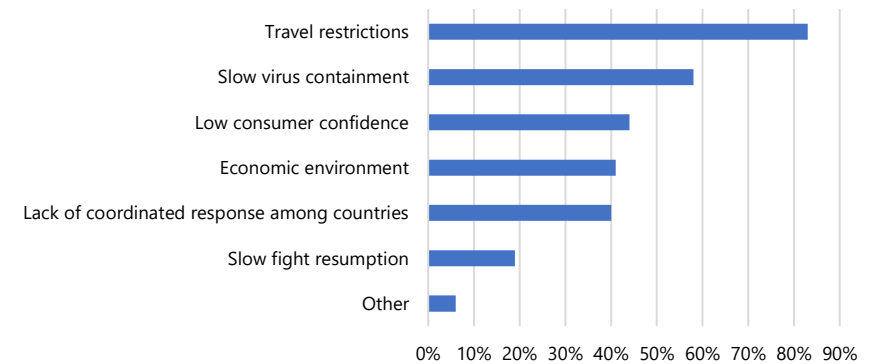


Figure 40: Survey results for "What are the main factors weighting on the recovery of international tourism?" (in %). Source: UNWTO


- The collapse of the **economic environment** and the **lack of a coordinated response** to contain the pandemic between governments were also recognized as important hurdles that are slowing down the recovery.
- **Slow flight resumption** was considered relatively less important than the other factors.

Covid-19 was first detected in Portugal in March 2020, and after a relaxation of restrictions in May, the second wave arrived later


The number of new active cases and daily deaths was higher during the second wave

The evolution of daily new cases and daily deaths due to Covid-19 in Portugal


- March 2- **first confirmed case**.
- March 18- **state of emergency** is declared.



May 2- **the end of the emergency state** and presentation of the deconfinement plan.



- July 3 - the **supplementary budget** is approved to respond to those most affected by the pandemic.
- July 30 - **new rules** for bars and restaurants.



- September 6 - **return to classroom attendance**.
- November 9 – **new state of emergency**.
- Some of the pharmaceuticals that are developing **vaccines** announce significant progress.
- November 24 - Renewal of the state of emergency.

March

April

May

June

July

August

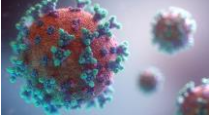
September


October


November


December

- April 10 - the **peak of the first wave** is reached with 1516 new cases of infection in one day.









- June 6 - 'Info Praia', an app with information about **Portuguese beaches** and the number of persons that each one was able to receive, is released.
- June 8 - Portugal is the **first country** to receive "Safe Travels" seal.
- August 28 - The application **Stayaway covid** is released.
- October 14- declared a **state of calamity** throughout the national territory.
- October 28 - **mandatory use of a mask** on the street when it is not possible to keep a distance of 2 metres.
- December 3 - Announcement of the national **vaccination plan**. 22 million vaccines have been ordered for Portugal.
- December 27-**vaccination started**.

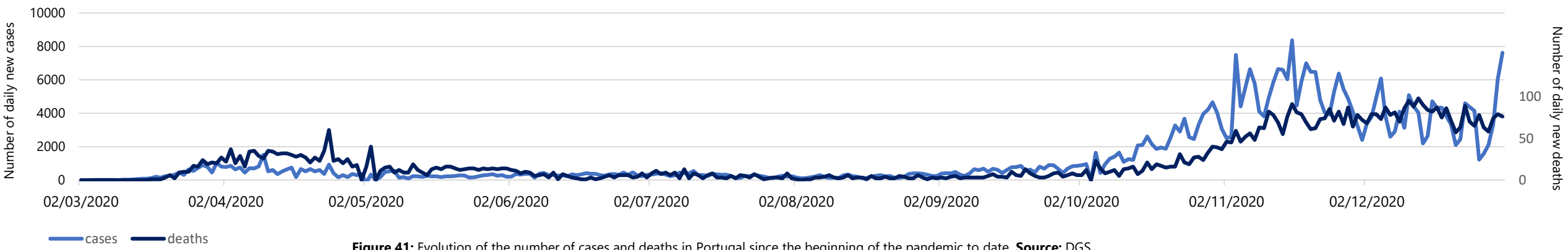


Figure 41: Evolution of the number of cases and deaths in Portugal since the beginning of the pandemic to date. Source: DGS

Comparing to Italy and Greece, Portugal has presented a higher number of tourist arrivals

This could be explained by the strong growth and development in the Travel & Tourism sector over the last decade

What contributed mostly to Tourism Revenues' crash was the lack of foreign tourists. All the positive growth during Summer was mainly due to national tourists.

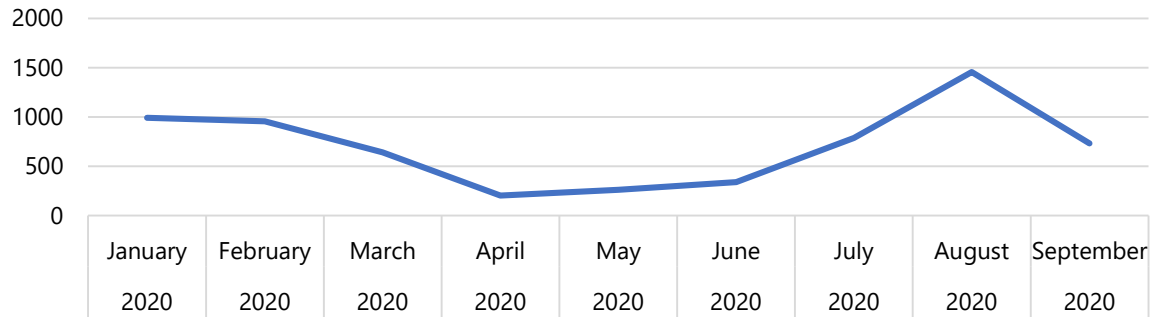


Figure 42: Tourism Revenues' evolution throughout 2020. Source: Banco de Portugal

Additionally, the accommodation sector has only been able to survive due to Governmental and touristic organizations' financial support:

The **Travel & Tourism sector** received from the Government a **€60 million credit line** for micro-businesses and were given the opportunity to collaborate with Turismo de Portugal in order to tackle the challenges resulting from COVID-19.

The Government also **approved €900 million credit line** for all accommodation establishments.



Turismo de Portugal has made available a **fund of €250.000 to support accommodation and hotel owners** with electricity, water, gas, and cleaning costs.

Source: BP, Statista

Covid-19 | Measures to support the travel and tourism sector in Italy and Greece



- The Italian government will release **€9 billion** by the end of 2020 to **support culture and tourism**. It has also made available **monthly contributions** of between 600 and 1000 euros for **cultural operators and employees in tourism and the leisure industry**. Tourism contributes about 13% to GDP, according to the World Trade and Tourism Council.



- The Greek government is supporting its employees in tourism impacted by Covid-19 containment measures by being eligible for **subsidies, compensation and insurance coverage**. Additionally, it released an extension of the right to not suspend work contracts until July and a **rent reduction** for businesses by 40% until the end of August 2020

Number of foreign arrivals in millions | Benchmark with Italy and Greece

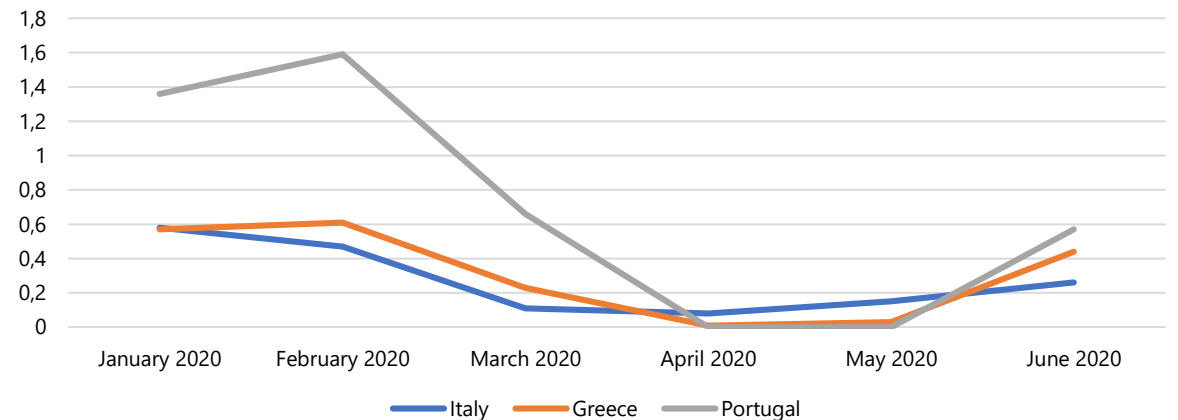


Figure 43: Number of foreign arrivals throughout 2020 in Portugal. Benchmark with Italy and Greece (in millions). Source: Statista

The sharpest drops in guests in Portugal were from Ireland and the United States of America during 2020

Azores and Lisbon had the most negative variation in relation to the drop in international tourists

Variation of guests in Portugal between January and October of 2019 and 2020 (%)

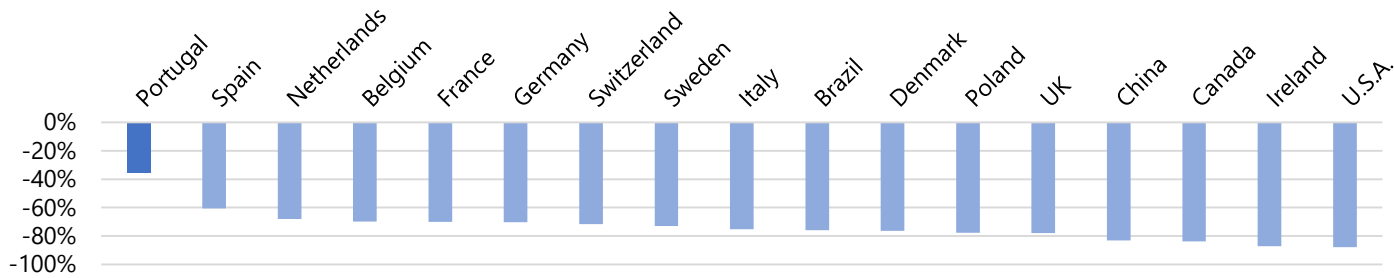
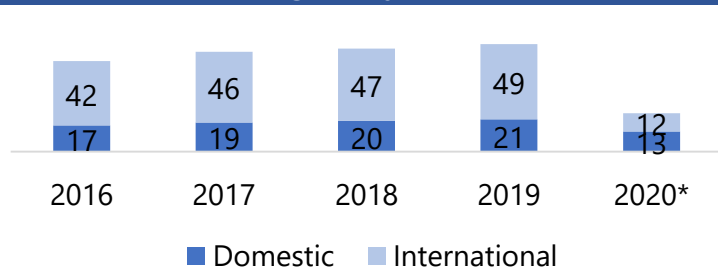


Figure 44: Variation of the number of guests per market in Portugal comparing the period of January and July of 2019 and 2020 (in %). **Source:** Travel BI

- The **sharpest drops** in guests in Portugal during 2020 were from **Ireland**, which presented a variation of **-87%**, and the **United States of America** with a variation of **-88%**.
- The main market in terms of guests, **Spain**, was among those that registered a **smaller drop** compared to other countries, but still very significant, with a value of **-60%**.
- **Only Portugal fell by less than 50% as domestic tourism fell by 36%.**

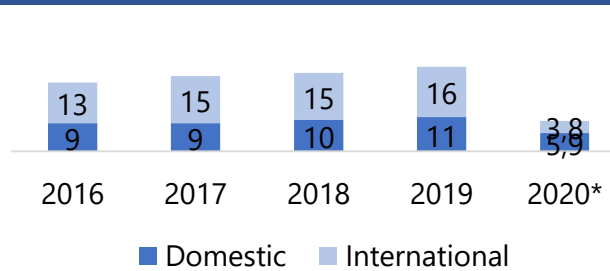
Overnight stays (millions)



*The figure for 2020 accounts for data between January and October

Figure 45: Year-to-date overnight stays in Portugal (in millions). **Source:** TravelBI

Guests (millions)



*The figure for 2020 accounts for data between January and October

Figure 46: Year-to-date number of guests in Portugal (in millions). **Source:** Travel BI

Azores and Lisbon had the most negative variation in relation to the drop in tourists (January-October 2019-2020)



Figure 47: Variation of the number of tourists in Portugal per region comparing the period of January and July of 2019 and 2020 (in %). **Source:** Travel BI

Source: Travel BI

Despite the beginning of the year with promising values, RevPAR suffered an abrupt break due to the pandemic

Only in May of this year the RevPAR started to pick up on its levels. However, never reaching its normal values comparing to previous years

RevPAR (January 2020 – October 2020)

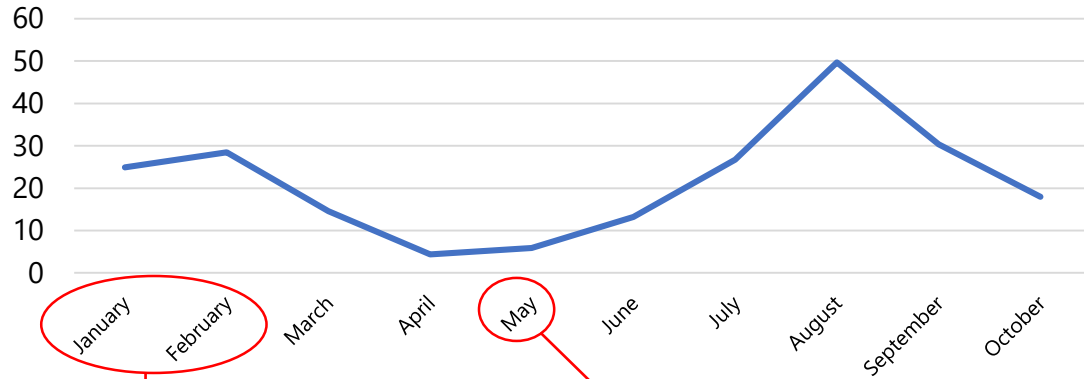


Figure 48: Evolution of RevPAR throughout 2020 in Portugal (in €). **Source:** Travel BI

These first two months of 2020 were indicating greater growth perspectives comparing to previous years on the same period.

Gradual release from confinement

- Despite showing very positive results in the first two months of 2020, the RevPAR started to decrease exponentially reaching its **lowest** in April given all the pandemic restrictions.
- As the measures were less restrictive, and given the beginning of the high season, the RevPAR started to **pick up from May onwards**.

Source: Travel BI

RevPAR per region between January and October of 2020

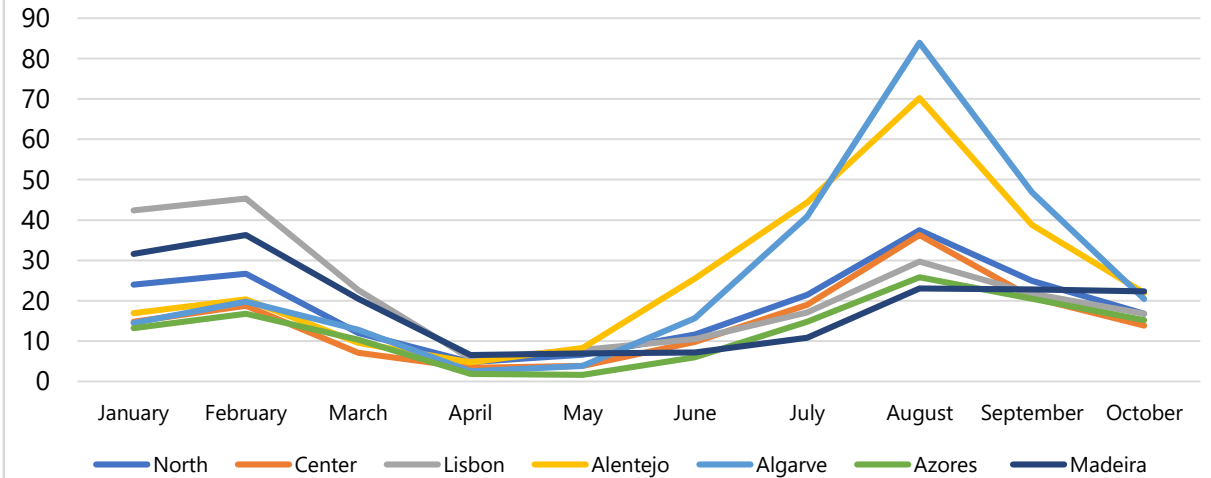


Figure 49: Evolution of RevPAR per region throughout 2020 in Portugal (in €). **Source:** Travel BI

RevPAR 2010-2020 (€)

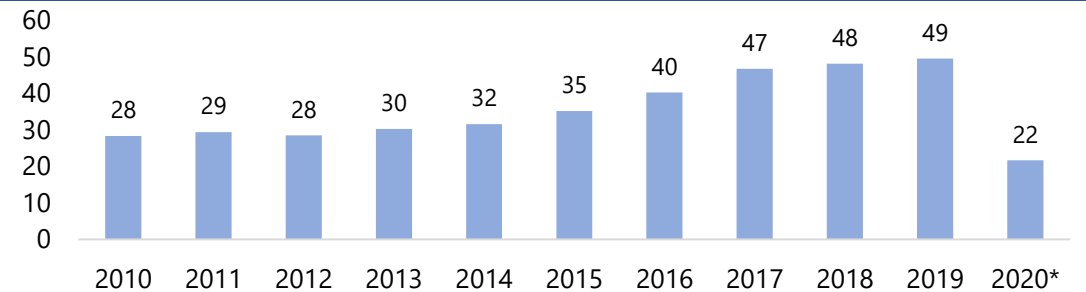


Figure 50: Year-to-date RevPAR in Portugal (in €). **Source:** Travel BI

* The figure for 2020 accounts for data between January and October

In April 2020, the total revenue per type of accommodation reached its lowest point given the confinement

This decrease can be explained by the number of international tourists travelling being much lower than before

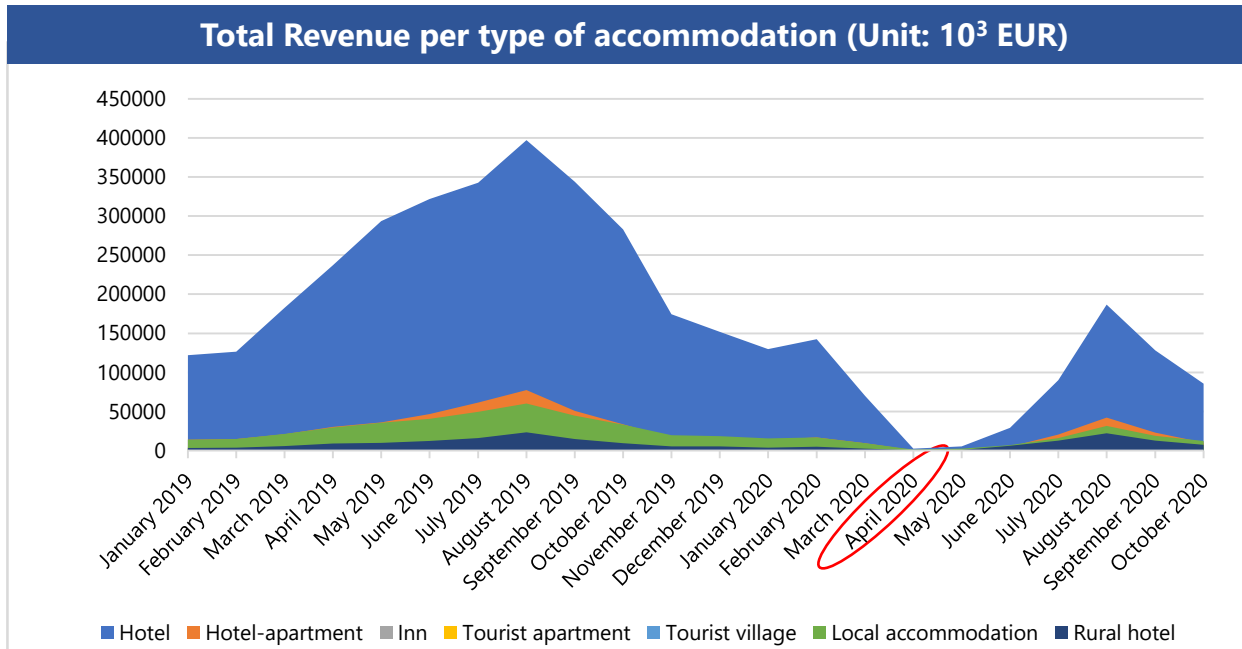


Figure 51: Total Revenue per type of accommodation over 2019 and up to date in 2020 . Source: Travel BI

- The adverse effects of confinement can be seen in the graph, as the total revenue from tourist accommodation units reached a minimum in **April 2020**.
- Despite the increase in the following months, this recovery was not sufficient since the value of total revenue in July 2020, a month that belongs to the “high season” for tourism in Portugal, is equivalent to the figure of January 2019, and even lower than that of January 2020, representing a **drop of, approximately, 70% compared to the same period**.

Source: Travel BI

Comparison between the number of guests per type of accommodation between January and October of 2019 and 2020 (%)

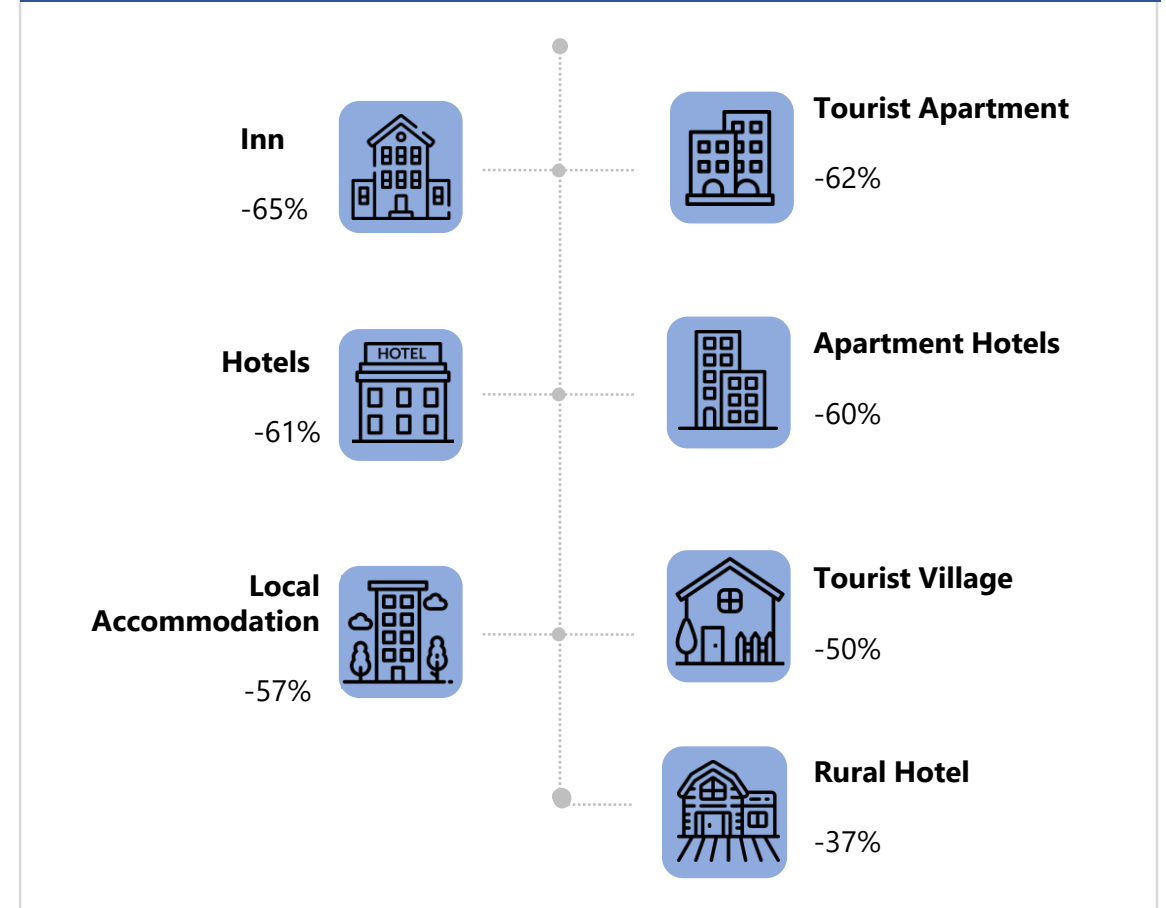


Figure 52: Variation of the number of guests, per type of accommodation, between the period of January and October of 2019 and 2020 (in %). Source: Travel BI

The survey received 630 responses: 320 from suppliers and 310 from consumers

Covid-19 traveler seeks for new ways of traveling, is more demanding and has the need to adapt quickly to new technologies given this unstoppable development.

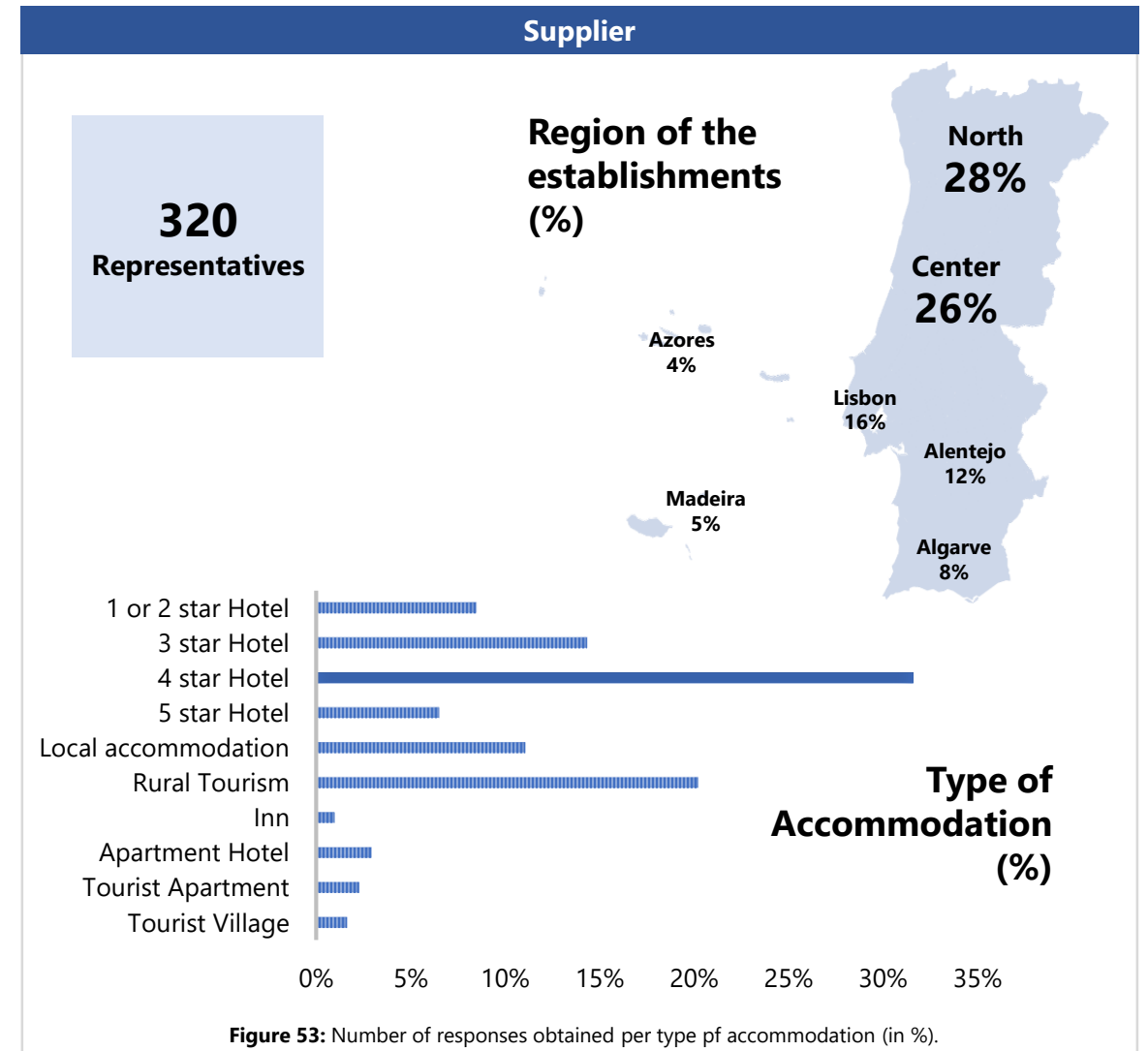
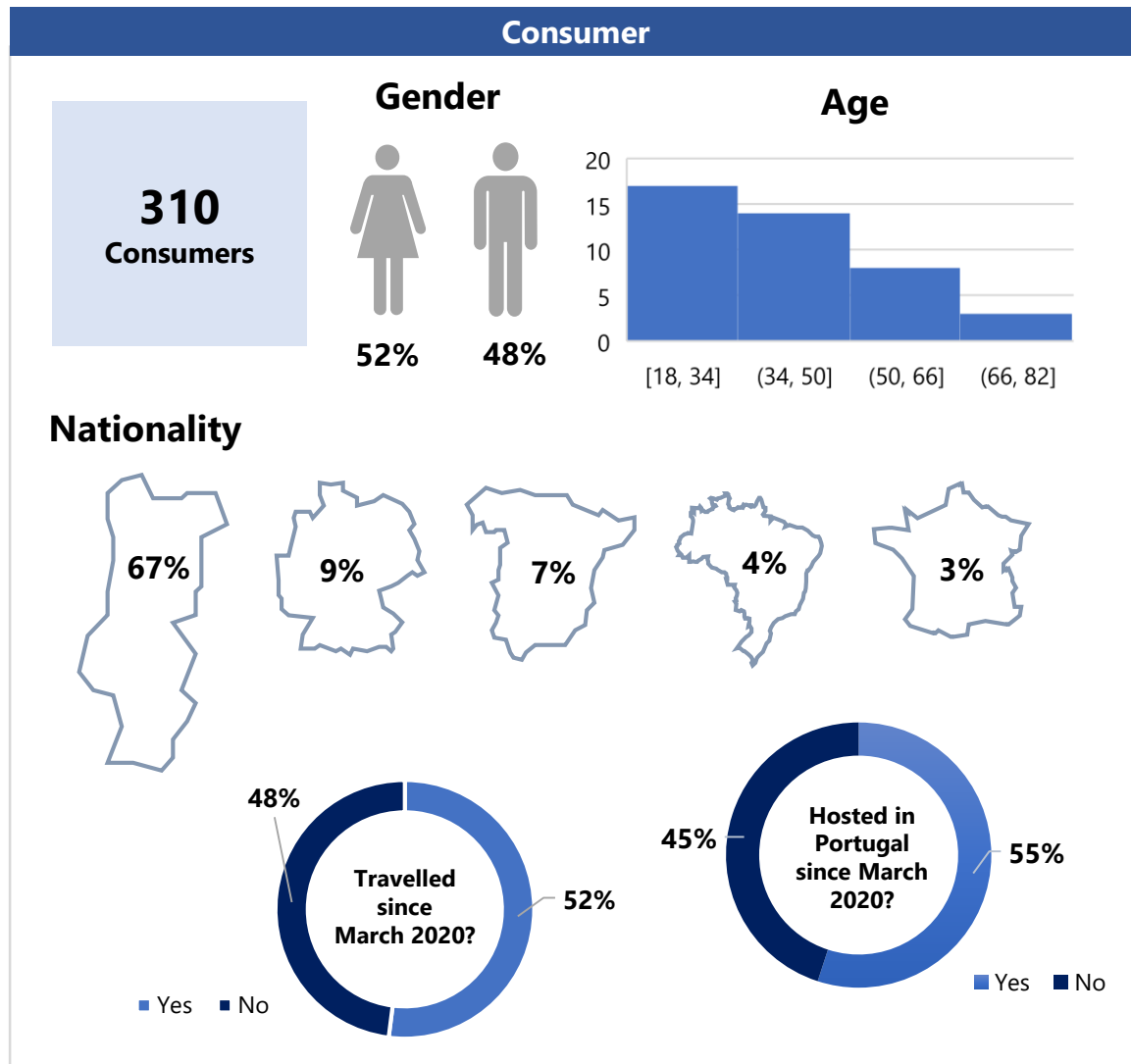


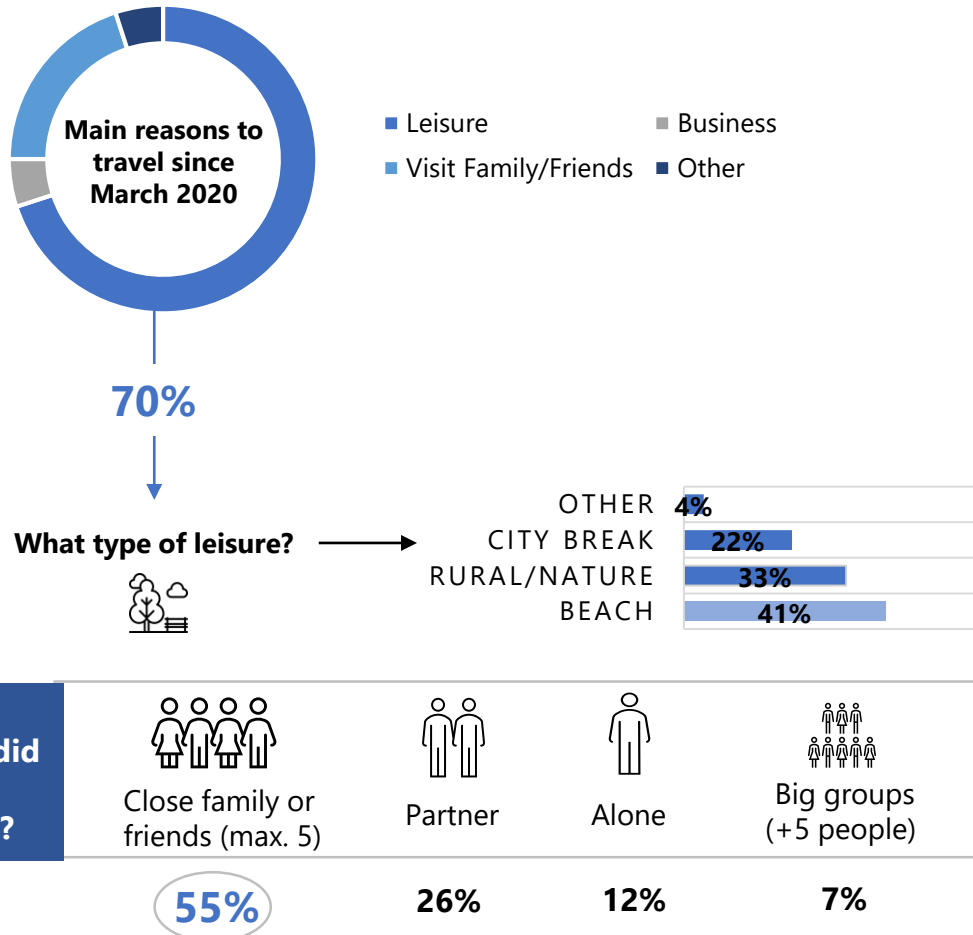
Figure 53: Number of responses obtained per type pf accommodation (in %).

Source: All the information contained in this slide was retrieved from primary data - Survey

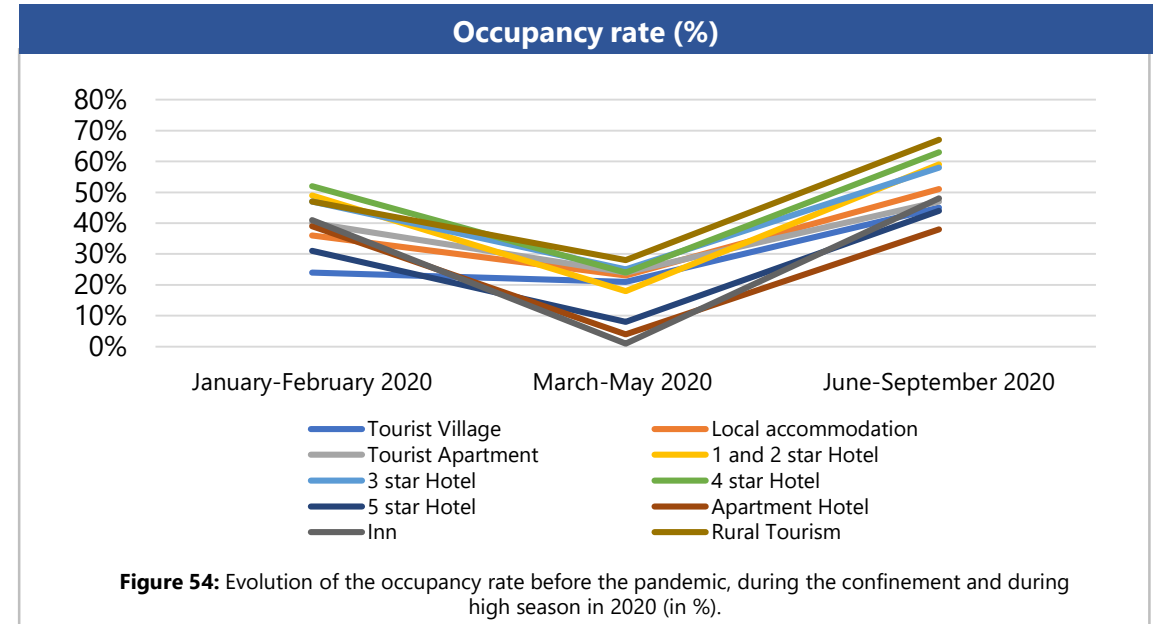
70% of respondents travelled for leisure with Rural Tourism presenting the greatest occupancy rates during Summer

Despite all the uncertainty, 70% of consumers have travelled in the last few months which explains the great increase in the occupancy rates during high season

70% have travelled for leisure since March 2020. The majority indicated that they did so to go to the beach, followed by those who went to a nature/rural environment.



48% have not travelled since March 2020, 15% indicated that they have not travelled because they do not usually travel.



Why did people not want to travel during the March-May period?

- 32%** fear of changes in restrictions from another country.
- 19%** trip cancelled due to restrictions imposed by the pandemic
- 18%** cancelled the trip because they did **not feel safe staying in any tourist accommodation** during the pandemic.
- 31%** Due to other reasons

Source: All the information contained in this slide was retrieved from primary data - Survey

Creating a consumer journey during the survey helped us identify the emerging trends due to the pandemic

The new traveler: evolving ways of traveling, greater customer demand or the need to adapt quickly to new technologies in unstoppable development

The main **objective** of the survey was to **understand what behaviour respondents had before March 2020**, when the first cases of Covid-19 were recorded in Portugal, **understand how it has changed the travellers' perceptions** and **future prospects on the consumer's and supplier's side**.

THE PROCESS OF PLANNING A TRIP



- The **software** that was used to conduct the survey was **Qualtrics**.
- The **distribution** of the survey was done, on the supplier's side, by **sending emails** to Portuguese tourist accommodations from all municipalities of Portugal in order to ensure a diverse sample, and, on the consumer's side, through **Facebook, WhatsApp groups** and **direct message**. The final number of respondents was 630 with **310 consumers** and **320 representatives of tourist accommodation in Portugal**.
- The survey was launched on October 18th and closed on December 5th.

Online travel agencies (OTAs) are the channel most used by consumers and suppliers

83% of consumers indicate that they prefer online travel agencies and 94% of suppliers are present in this channel

Online Travel Agencies have been impacted by Covid-19 both for consumers and suppliers

Consumers



When asked by the preferred channel to book accommodation, **83%** of respondents have chosen **Online travel agencies (OTAs)**. The second most used channel by consumers is **direct reservation** preferred by **14%** of respondents and, the remaining **3%**, choosing **travel agencies and tour operators**.

Consumers indicate that they prefer this channel because it is the **quickest way to find accommodation and where they can read reviews from other consumers**.

Suppliers



Followed by **direct booking** (email, telephone or website), **OTAs** are used by **94%** of the respondents to allow guests to book and, on average, **55%** of reservations are made through this channel.

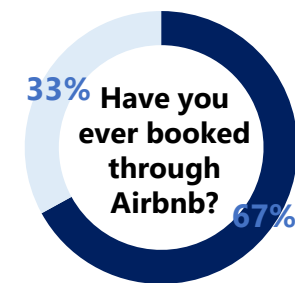
- **21%** claim that the demand for OTA's has increased during the pandemic.

How have OTAs been impacting?

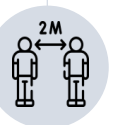


- The new traveller, when planning a new trip, **not only considers his entertainment, but also his safety**.
- OTAs are responsible to support customers have an easy and direct online experience helping them overcome all the turbulence already provoked by Covid-19.
- People demand quicker responses to every challenge they encounter. OTAs are expected to provide every detailed information the customers need and help them find the **perfect accommodation**.

Asking consumers...



■ Yes ■ No



The accommodation choice has suffered a major impact by Covid-19 since guests started to prioritize their safety

Hotel continued to be the most preferred choice given its implemented cleaning measures given a sense of safety to its guests

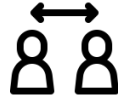
There are new factors that are being considered carefully when booking accommodation...



Location in order to understand if it is placed in a risk zone



Safety measures against Covid-19 the establishment is following as well as the protocol of action implemented



The ability to guarantee the **social distancing**



Cancelled reservations

75% of **suppliers** claim to have decided to opt for more flexibility in terms of cancellation which gives **more confidence to the customers**

... These factors have been affecting the consumers' choice in terms of type of accommodation during the pandemic:



38% of consumers chose **hotel** as the type of accommodation where they feel the safest since it is the one they usually opt for and the cleaning measures implemented during the pandemic are stronger which made them feel safer.

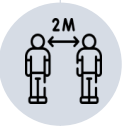
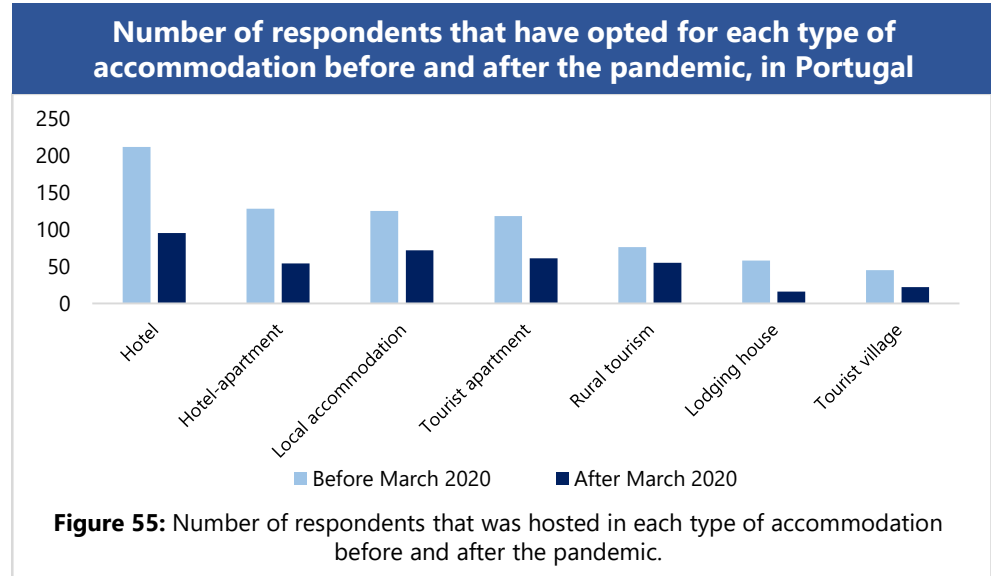


16% feel safer in **local accommodation** with the majority saying that this type of accommodation allows for a greater social distance between guests and provides a closer feeling of home.



15% of respondents chose the **rural hotel** associating it with a rural/ nature environment which is generally less crowded and isolated places given a sense of security.

Source: All the information contained in this slide was retrieved from primary data - Survey



Means of transport have suffered some changes with airplanes decreasing exponentially during Covid-19

Travelers have chosen the car as the first option when travelling during Covid-19 since it provides them with a feeling of safety

What has been the most important aspect when choosing a means of transport for consumers during the pandemic?



Means of transport chosen before and after the pandemic

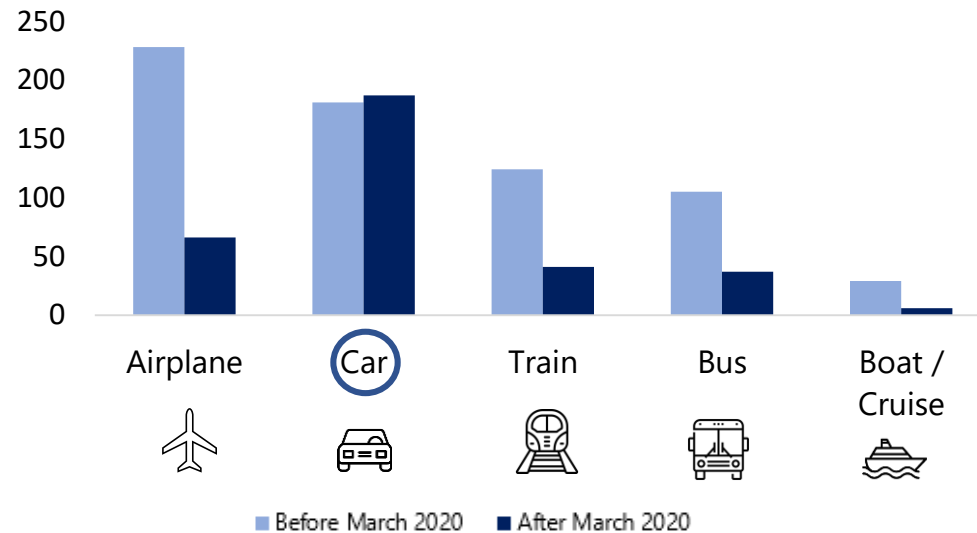
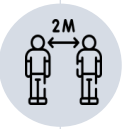


Figure 56: Number of respondents that chose each means of transport before and after the pandemic.

The only means of transport that consumers prefer to use more after March 2020 than before this date is the **car**.

The increase may be justified by the fact that consumers have also indicated that they prefer to use a **more private means of transport** than to share transport with other people, as they feel less safe and more likely to contract the virus in those spaces, while the car allows for social isolation.

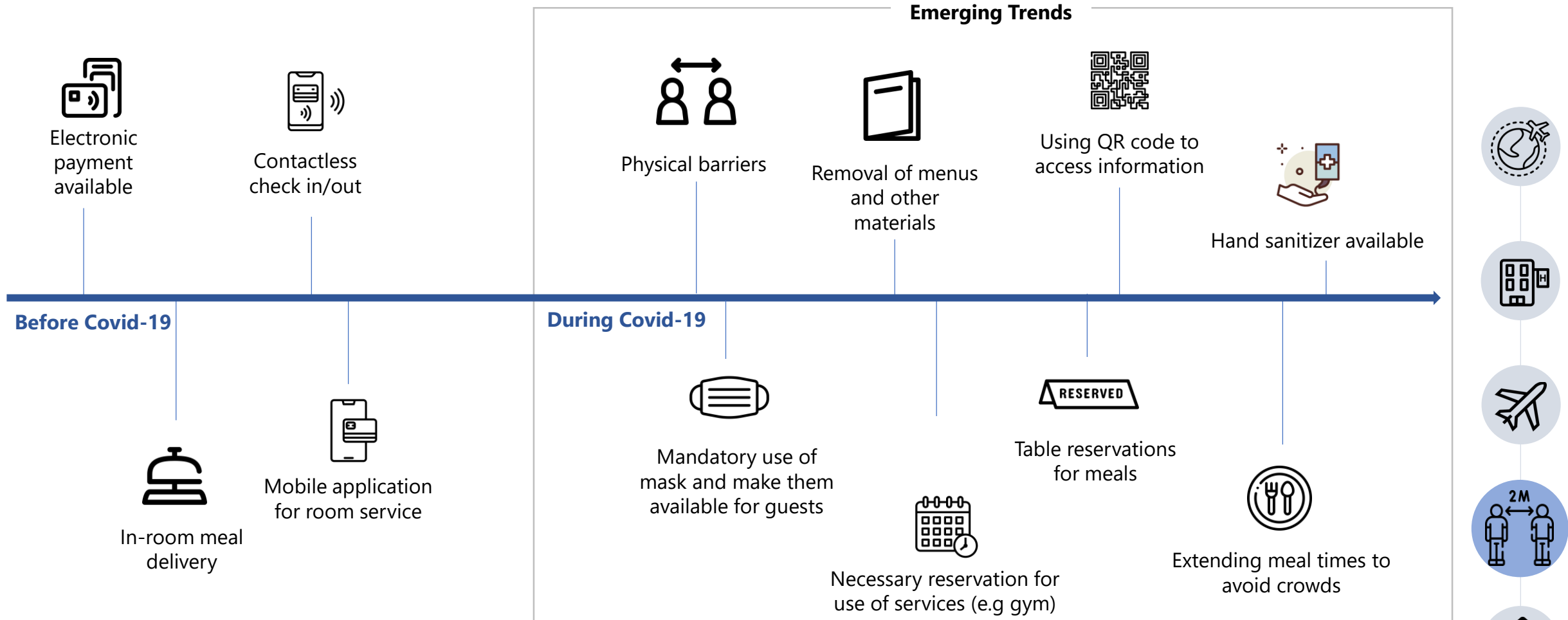
Airplanes have suffered the **biggest crash** since the beginning of the pandemic due to the multiple restrictions imposed by different countries and the consequent uncertainty it caused to travellers.



Source: All the information contained in this slide was retrieved from primary data - Survey

The pandemic required establishments to adopt a whole new way of operating

Some of the measures already implemented before the pandemic had an even greater emphasis during this period



- In order to adapt to a **new type and demanding traveller**, the accommodation sector had to completely reformulate its way of operating in a daily basis. Thus, it was necessary to adopt a new set of measures in order to ensure that **guests feel completely safe**. However, this change in operations has contributed to an **increase in costs and a very limited profit**.

Source: All the information contained in this slide was retrieved from primary data - Survey

Measures implemented by establishments started to influence the choice of consumers in accommodation

Despite considering the safety measures adopted when booking accommodation, price continues to be primary factor when trying to choose the best option

Did the Covid-19 travellers feel safe when going to some type of accommodation during the last few months?

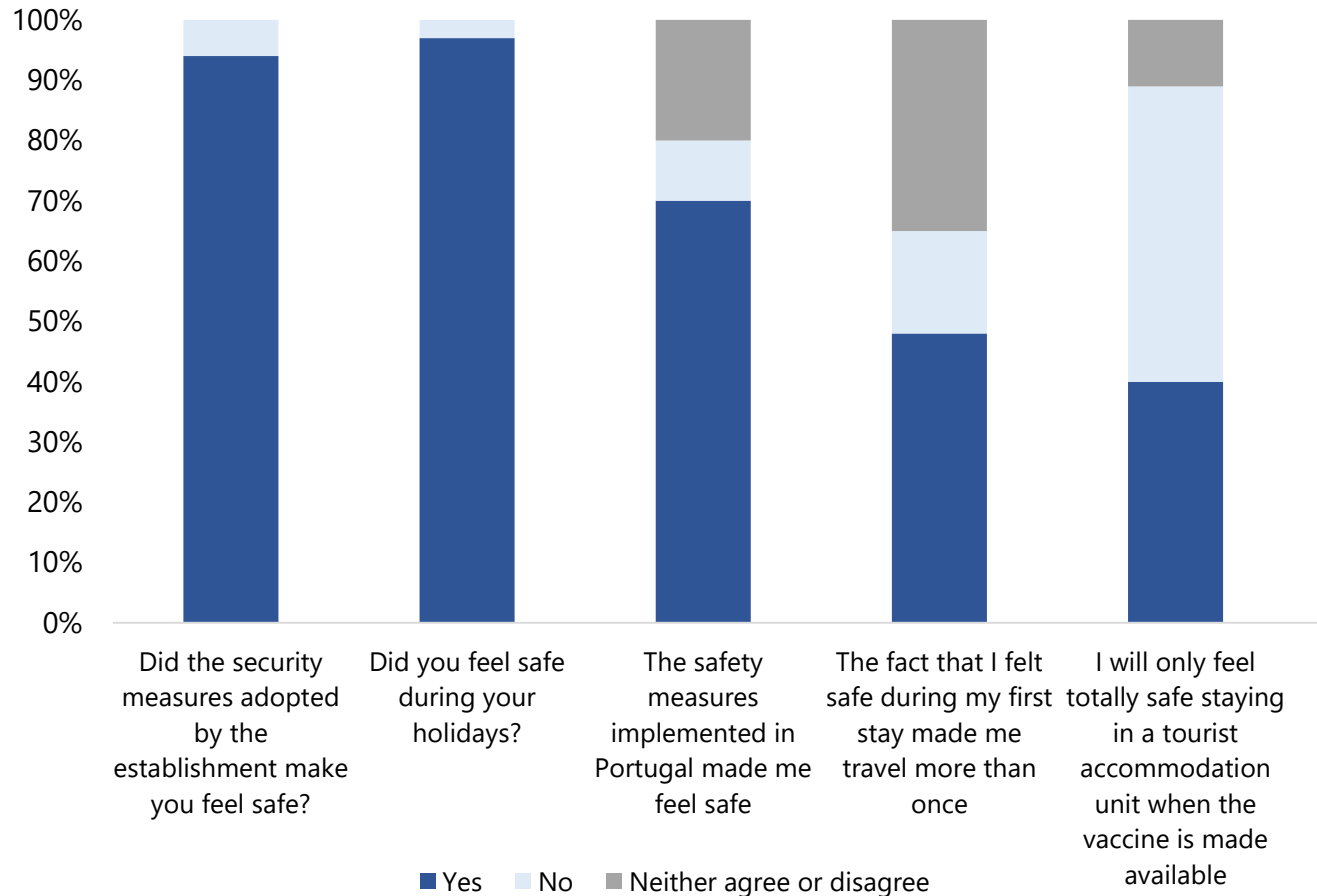
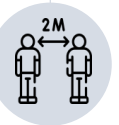


Figure 57: Number of respondents that answered "Yes", "No" or "Neither agree or disagree" (in %).

- **94%** of respondents indicated that the sanitary measures taken by the establishment in which they were housed were **sufficient**, with only **6%** disagreeing.
- **97%** indicate that they **felt safe** during their stay, and only **3%** indicate that they **did not feel safe**.
- **70%** agree that the **measures** taken by the Portuguese government have made them feel secure, and only **10%** express a contrary opinion.
- **49%** disagree that they will only feel completely safe travelling again when a **vaccine** is discovered and starts to be distributed
- Despite the pandemic situation, 31% of consumers indicate that **price** remains the most important aspect when choosing tourist accommodation while 30% consider that **safety measures** adopted is the most important one.



Source: All the information contained in this slide was retrieved from primary data - Survey

30% of employers intend to change the recruitment process, especially the training and staff restructure

The pandemic required employees to be more versatile and pay special attention into costumers' new needs and preferences to guarantee their safety.

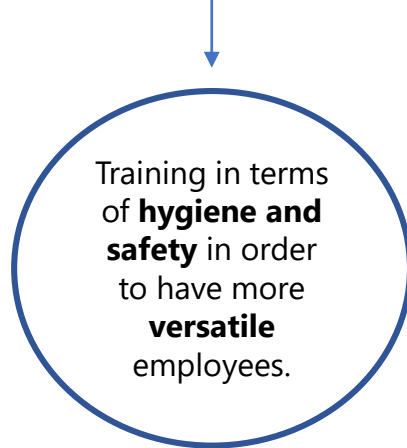
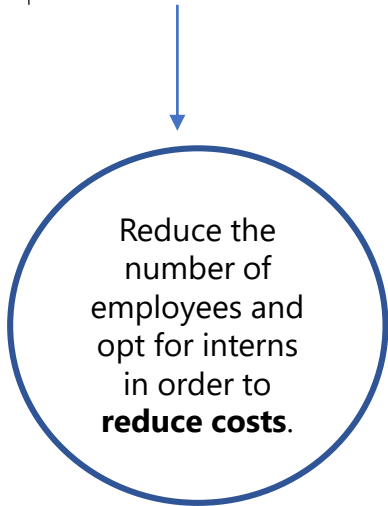


The employers' perspective



Analysing the survey,

Approximately **30%** of respondents intend to **change the recruitment process**, pointing out the main focus on a **different training and restructuring staff**



Source: Primary data – Survey, People 1st International

Key future workforce skills relating to the pandemic

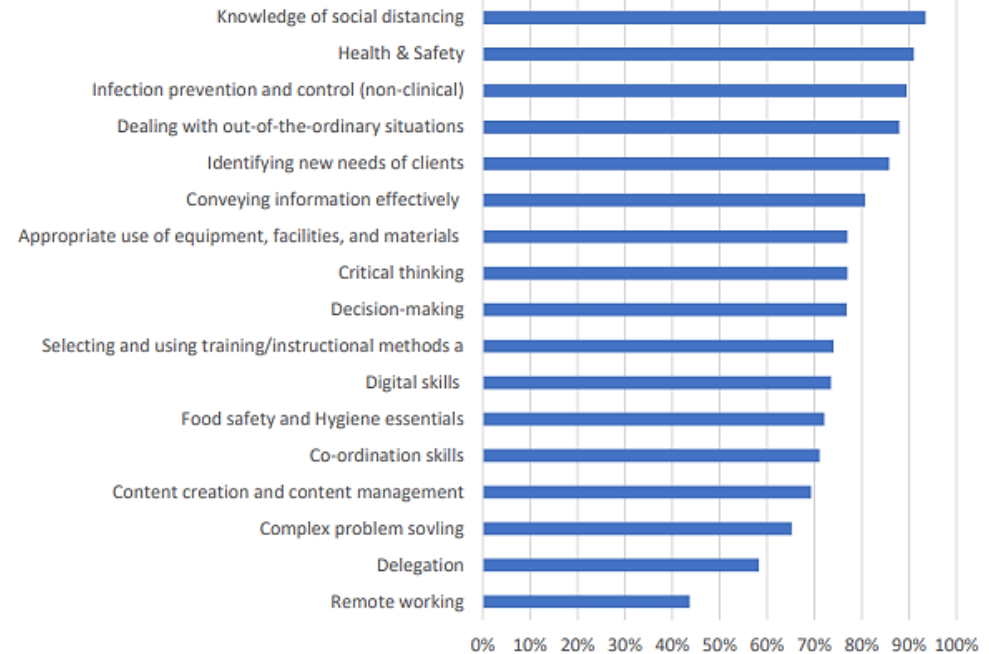
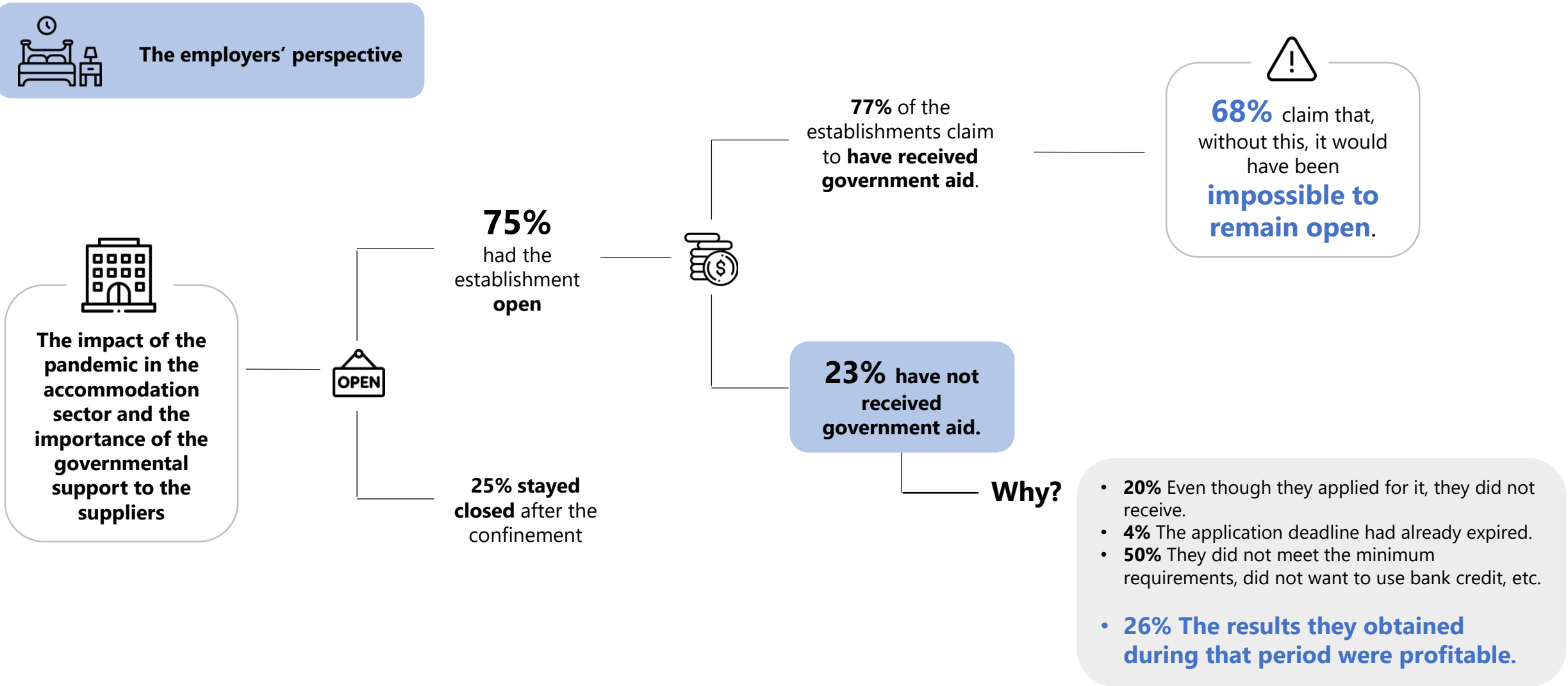


Figure 58: Relevance of each workforce skill, related to the pandemic, in the future (in %). Source: People 1st International

- With the pandemic, has emerged the need of **employees to possess new skills and abilities. Social distancing and health & safety measures** are some examples of the necessary knowledge employers demand from their workers.
- They have to receive training in order to learn how to deal with a new type of traveller which entitles new preferences and needs. However, in order to provide a good and safe service to their guests, employers will have to ensure that their staff feel safe and motivated.

Governmental support in Portugal contributed to the sector's survival despite not being enough in the long run

The Accommodation sector has suffered a major impact and the governmental support has been crucial to guarantee its survival



Source: All the information contained in this slide was retrieved from primary data - Survey

Key Takeaways – Covid-19: The situation now

Covid-19

Caused the **worst crisis** for International T&T to date.



International Tourist Arrivals dropped 70%

3. The virus' impact

In Portugal,

1st case

was detected in March. A second wave arrived in October



their markets represent the sharpest drops in guests



have presented a lower number of tourist arrivals comparing to Portugal



RevPAR suffered an **abrupt break** due to the pandemic and the total **revenue per type of accommodation** reached its **lowest**

4. Emerging Trends

According to the survey,

>50%

Have travelled since the beginning of the pandemic, specially for **leisure**



Hotels had the greatest demand, but Rural Tourism had the higher occupancy rates during Summer



People did not travel abroad mainly due to **fear of changes in restrictions in another country**

Change in the means of **transport**



Change in **priorities** when traveling



Establishments had to completely reformulate their operations



Governmental support in Portugal has contributed to the **sector's survival**



30% of employers intend to change the **recruitment process** to adapt to the pandemic

630

Responses submitted in the **survey**:

- 310 from **consumers**
- 320 from **suppliers**

Key Takeaways - Covid-19: The situation now

Section	Subsection	Takeaways
3. The virus' impact	3.1 T&T: a Global Crisis	<ul style="list-style-type: none"> The Covid-19 virus spread throughout the world causing an unparalleled health, social and economic crisis International Tourist Arrivals dropped 70% from January to August 2020 compared to the same months of 2019 Based on the first 8 months of 2020, the Covid-19 pandemic is becoming the worst crisis for international Travel & Tourism to date
	3.2 T&T: Covid-19 impact in Portugal	<ul style="list-style-type: none"> Covid-19 was first detected in Portugal in March 2020 and after a relaxation of restrictions in May, the second wave arrived in October Despite the drop, comparing to Italy and Greece, Portugal has presented a higher number of tourist arrivals
	3.3 The impact in the Accommodation's ecosystem	<ul style="list-style-type: none"> The sharpest drops in guests in Portugal were from Ireland and the United States of America during 2020 Despite the beginning of the year with promising values, RevPAR suffered an abrupt break due to the pandemic In April 2020, the total revenue per type of accommodation reached its lowest point given the confinement
4. Emerging trends	4.1 The Covid-19 Traveler & Supplier	<ul style="list-style-type: none"> The survey received 630 responses: 320 from suppliers and 310 from consumers. More than half of the consumers respondents have traveled since March 2020 and Hotel had the greatest demand. 70% of respondents travelled for leisure purposes with Rural Tourism presenting the greatest occupancy rates during Summer
	4.2 Behavioral Change in the Sector	<ul style="list-style-type: none"> Online Travel Agencies (OTAs) are the channel most used by consumers and suppliers The accommodation choice has suffered a major impact by Covid-19 since guests started to prioritize their safety Means of transport before and after the pandemic have suffered some changes with airplanes decreasing exponentially Measures implemented by establishments started to influence the choice of consumers in accommodation Most of the establishments had to completely reformulate its daily operations. However, only a few will last in the future
	4.3 Reinvention of the Sector	<ul style="list-style-type: none"> 30% of employers intend to change the recruitment process, especially the training and staff restructure Governmental support in Portugal has contributed to the sector's survival despite not being enough in the long run

Which story did we tell?

What are the trends in Travel & Tourism that are emerging during the Covid-19 pandemic and ...

What was the context before Covid-19?

Context

Travel & Tourism is one of the sectors with the greatest impact worldwide.

The Portuguese tourist Accommodations welcome an increasing amount of guests every year having registered a record number of guests in 2019.

Diagnosis

The evolution of the main tourism indicators in Portugal over recent years has been really positive.

At the same time the dependence of the economy on the Travel & Tourism sector is very high.

Transforming Trends



Technology



Sustainability



Wellness



How is the situation during Covid-19?

Situation

The impact of Covid-19 on International Travel & Tourism has caused the worst crisis to date.

The new traveller prioritizes safety when it comes to planning a trip during the pandemic.

Diagnosis

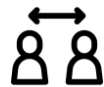
There has been a significant behavioural change in guests which led to the emergence of new preferences and needs.

Governmental financial support and Domestic Tourism have been key to the survival and reinvention of the sector.

Emerging Trends



Using QR code to access information



Physical barriers



Mandatory use of mask & its availability for guests

How will the "New Normal" be like?

Forecast

The "New Normal" will be characterized by "low touch" options, higher uncertainty, less business travel and greater environmental concern.

Scenarios are important tools to increase clarity and structure thinking.

Diagnosis

The recommendations will help Accommodations be more technologically apt, innovative and friendly to the environment.

Accommodations need to build resilience to meet the future trends of the sector and the consumer changing needs.

Lasting Trends



Low touch economy



Domestic Tourism



Less Business Travel



Sustainable Tourism

Which story did we tell?

... How can the Portuguese tourism Accommodation's ecosystem adapt to the changes and become competitive in the post Covid-19 world?

Recommendations



Now

Reactive response to the most immediate needs of the consumer

- Health and safety measures
- "Low touch" options
- Digital marketing

1st Priority

Next

Proactive response to deal with the many after-shock scenarios

- Local community
- Remote flexible work
- Outdoor activities

2nd Priority

Beyond

Foresight to what the future of the ecosystem will be like

- Productivity
- Sustainable travel options
- Ecological footprint

Future of the sector

In which phase of the crisis the measures need to be addressed?

In which factors your accommodation should focus on?

Which recommendations should have the highest priority?

Overall Key Takeaways

Module	Section	Key Takeaways
Context Analysis: The "Old Normal"	1. Travel & Tourism: Overview	<ul style="list-style-type: none"> Travel & Tourism is the fifth industry with the highest total GDP contribution and the fourth in terms of total employment contribution as of 2018 Travel & Tourism in Portugal is a strategic sector to the social development of the country, where many jobs are being created Tourists choose Portugal because of the hospitality, culture, beaches, climate, gastronomy and safety
	2. Accommodation's ecosystem analysis	<ul style="list-style-type: none"> During the last 5 years there has been an increase in the number of guests in Portuguese tourist Accommodations from the main markets that export tourists to Portugal Portuguese travel by car when they travel in their own country and by plane when they travel abroad. Online travel agencies is the most important channel New trends in tourism have emerged related to technology, sustainability and welfare.
Covid-19: The Situation Now	3. The virus' impact	<ul style="list-style-type: none"> Covid-19 pandemic is becoming the worst crisis for international Travel & Tourism to date. The reason behind the Portuguese Tourism Revenues' crash was the lack of foreign tourists. RevPAR suffered an abrupt break due to the pandemic.
	4. Emerging trends	<ul style="list-style-type: none"> Most of the respondents travelled for leisure and Rural Tourism presented the greatest occupancy rates. Safety measures implemented by establishments influenced the choice of consumers in the channel, type of accommodation and means of transport. Governmental support has been crucial to the sector's survival.
Path Forward: The "New Normal"	5. Lasting trends	<ul style="list-style-type: none"> The lasting trends are low-touch economy, domestic tourism, less business travel and sustainable tourism The pandemic has been a catalyst for change and acceleration of the digital transformation Some Accommodations around the world are references in digital transformation, adapted to the new business travelers, implemented the "bleisure" concept or have a positive ecological footprint
	6. Scenario Forecasting	<ul style="list-style-type: none"> The factors that will lead the recovery of international tourism are the lifting of travel restrictions, control of the Covid-19 propagation, increase in consumer confidence and improved economic environment "Reinvention" is what many Portuguese tourist Accommodations will have to do to survive The recommendations should be done based on the most immediate consumer needs to ensure sustainability and competitiveness in the future



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