



EUROPEAN COMMISSION  
DIRECTORATE-GENERAL  
REGIONAL AND URBAN POLICY

European Territorial Cooperation, Macro-regions, Interreg and Programme Implementation I

# Tourism & COVID-19 Impact Assessment & Measures in the MRS

14 September 2020

**tourism  
generis**

**George Drakopoulos  
Founder & CEO**

# Presentation outline

Aim of the project

Methodology

Understanding Tourism Economies

Previous crises & COVID-19

Impact assessment & Measures taken

Preparing the restart

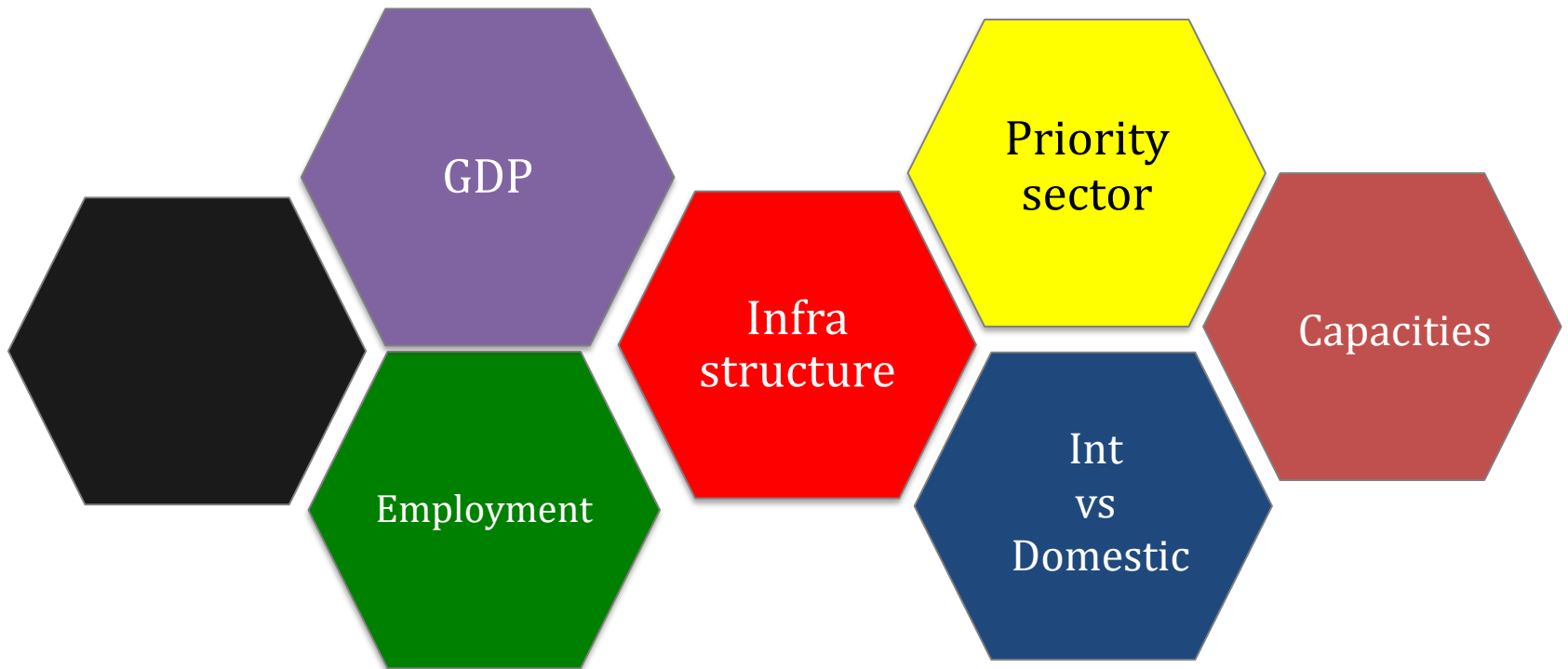


# Aim of the project

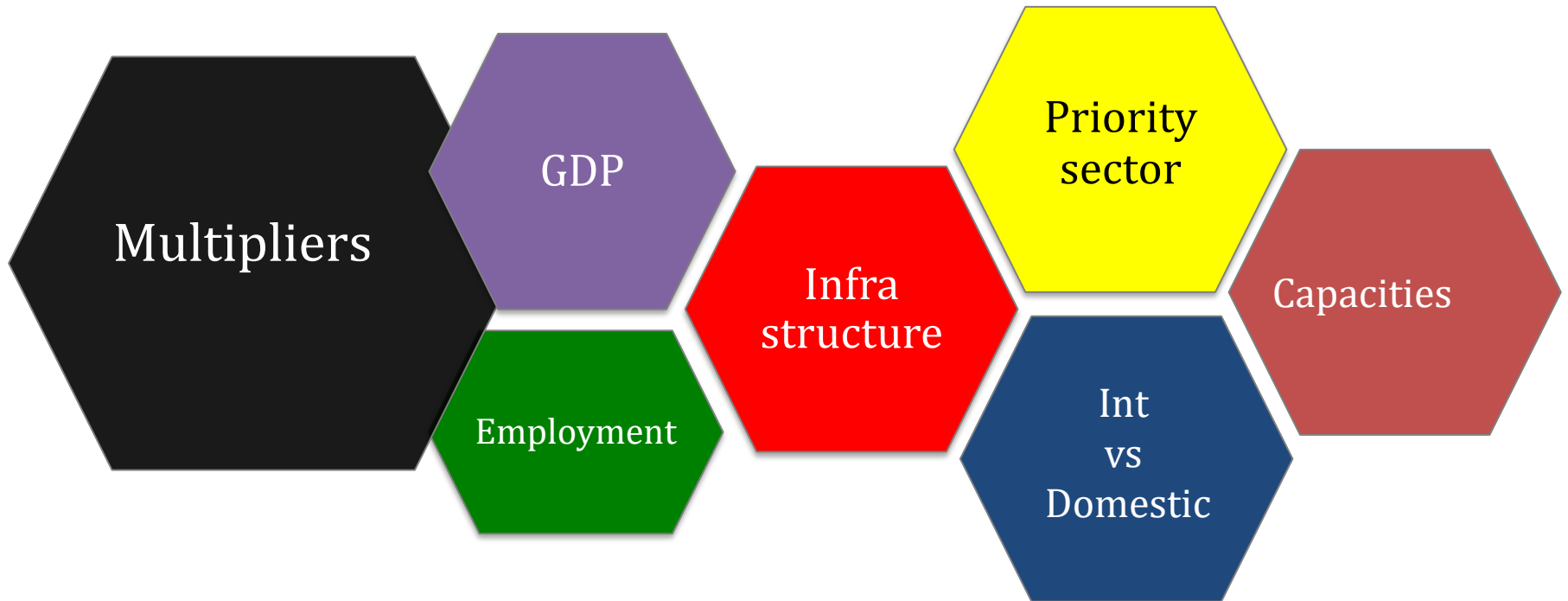
to assess the impact of COVID-19  
on the tourism sector  
at MRS Member-Countries



# Understanding tourism economies



# Understanding tourism economies



# Understanding tourism economies

## Group A

- Transport & Tourism industry % share of GDP (direct and total).
- Transport & Tourism industry % share of Employment (direct and total).

## Group B

- % share of international guests.
- % share of domestic guests.
- Inbound arrivals from the neighbouring countries.
- Outbound departures the neighbouring countries.

## Group C

- Modes of transport with ref to tourism.
- No of flight connections
- Traffic data for the other modes



# Understanding tourism economies

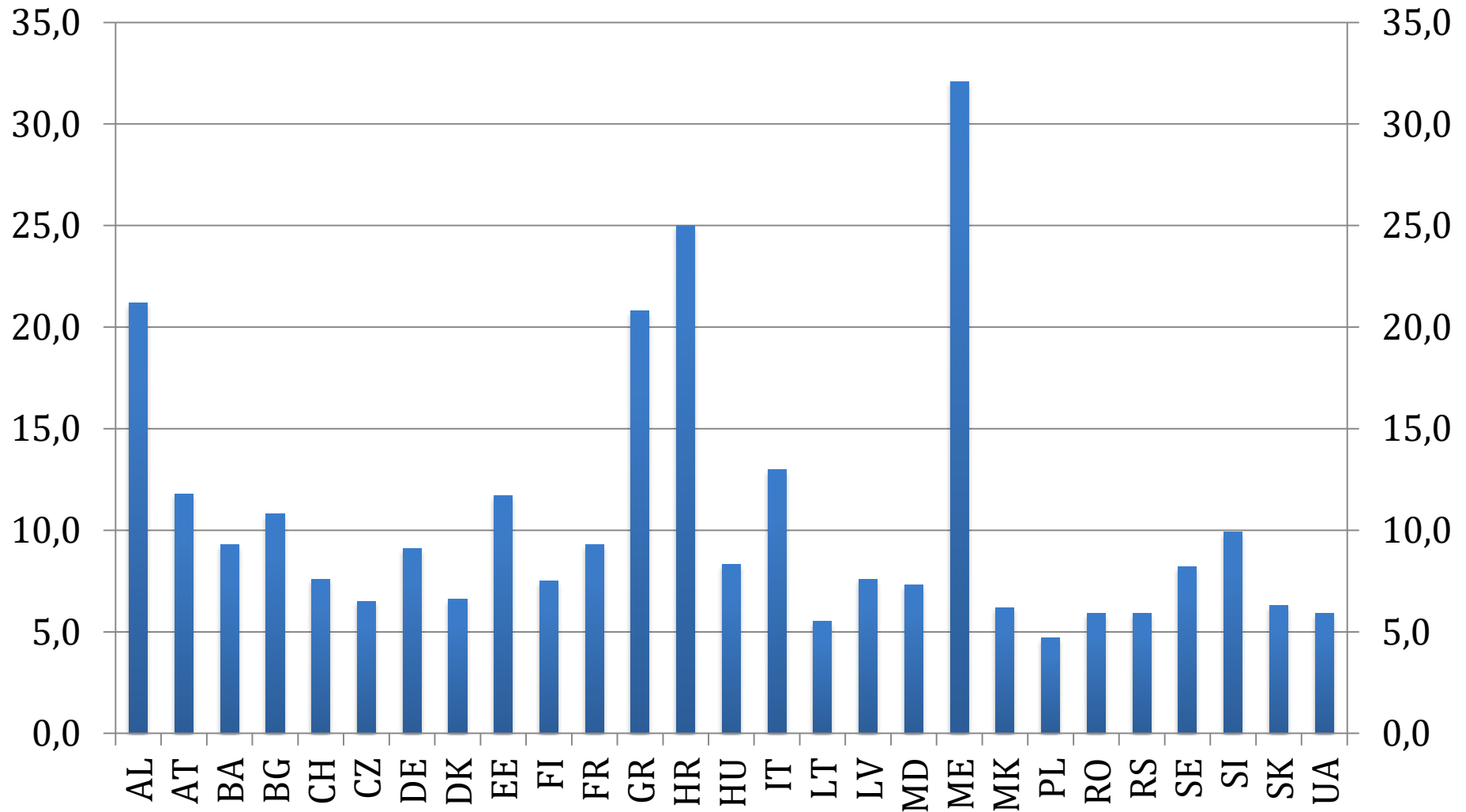
Indicator / Country		EE	DE	SE
T&T % share of GDP	(direct)	3,8	3,5	2,4
T&T % share of GDP	(total)	11,7	9,1	8,2
Income multiplier		3,1	2,6	3,4
T&T % share of Employment	(direct)	4,0	6,8	3,5
T&T % share of Employment	(total)	11,3	12,5	9,8
Employment multiplier		2,8	1,8	2,8
Prioritization of T&T	(max=7)	5,4	5,0	4,5
Tourist service infrastructure	(max =7)	5,4	5,9	4,8
Rank	(out of 140 on world level)	46	3	22

# Understanding tourism economies

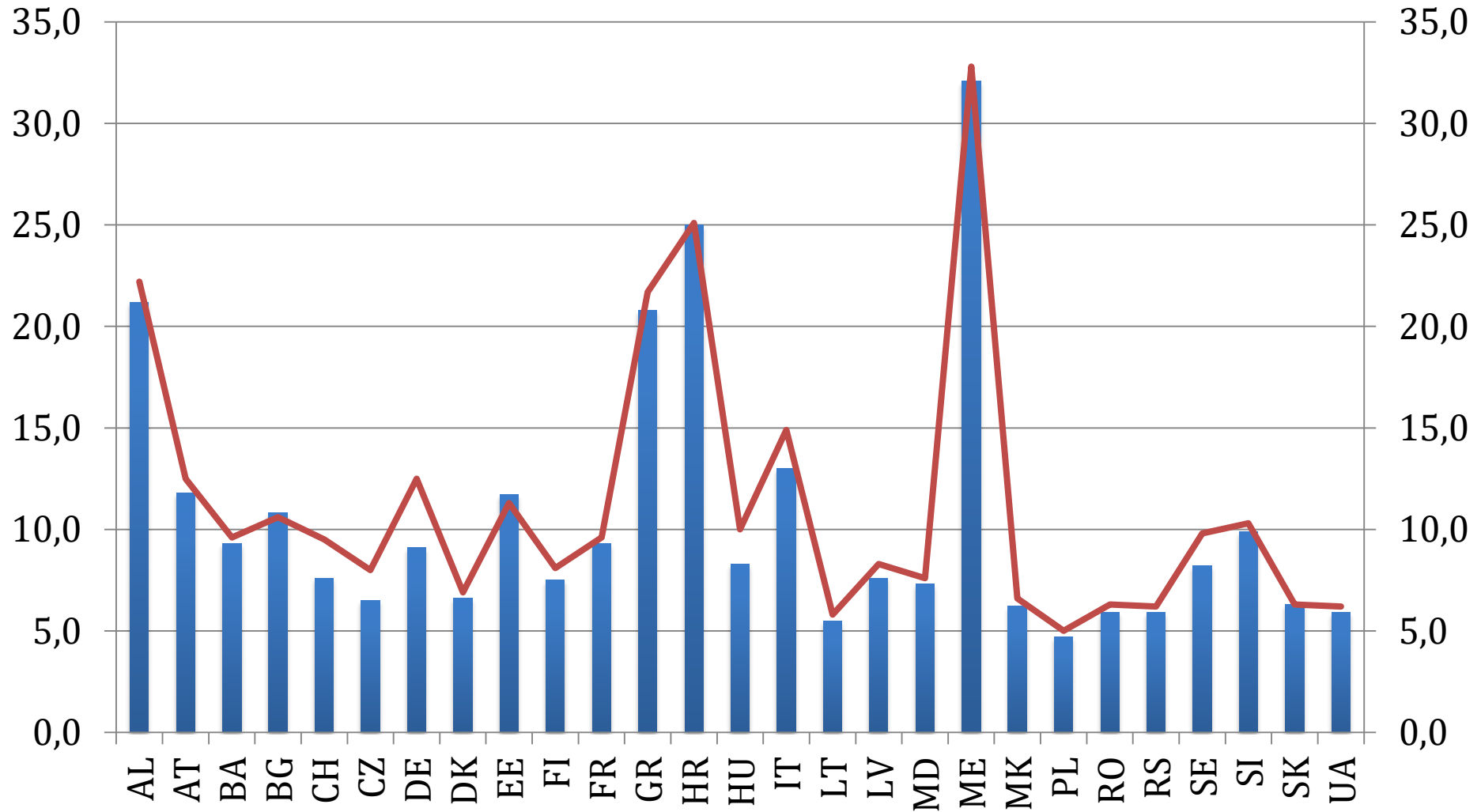
Indicator / Country	IT	CH	FR
Int tourist arrivals vs Population	0,97	1,30	0,28
Available capacity (bed places over 1000 inhabitants)	37,2	32,39	10,59
% share of international guests	49	49	30
% share of domestic guests	51	51	70

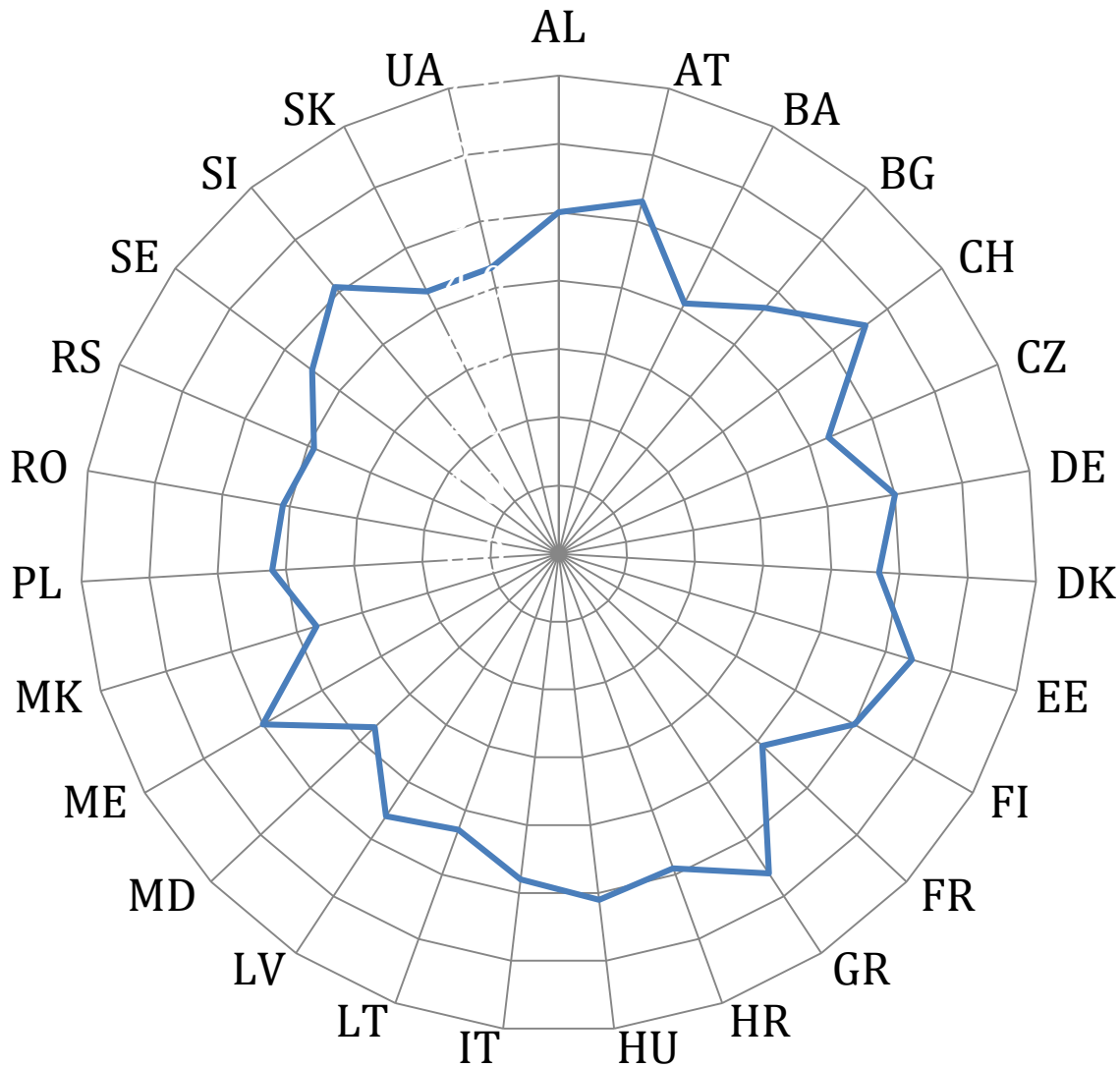


## ■ T&T % share of GDP

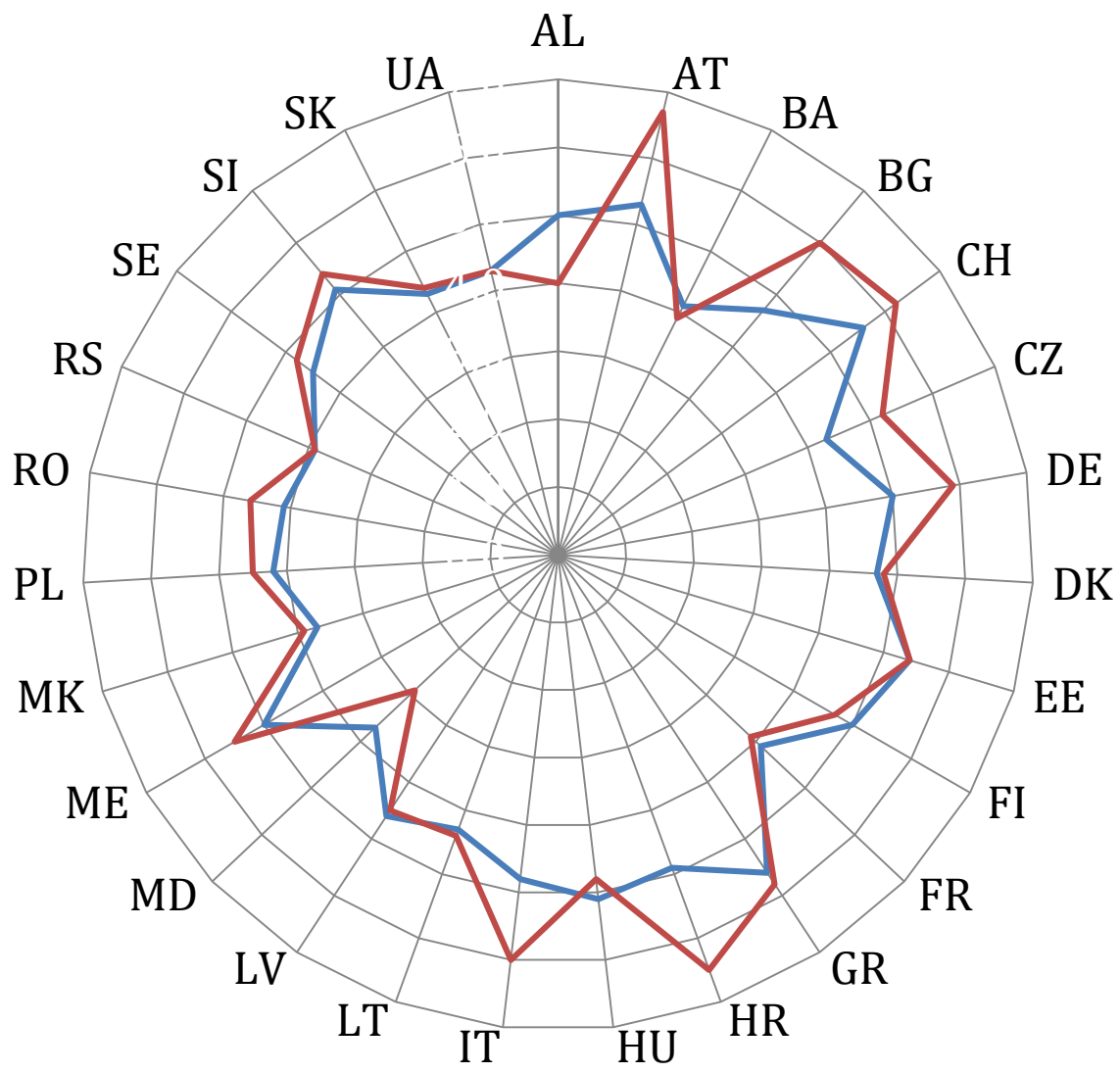


■ T&T % share of GDP  
— T&T % share of Employment



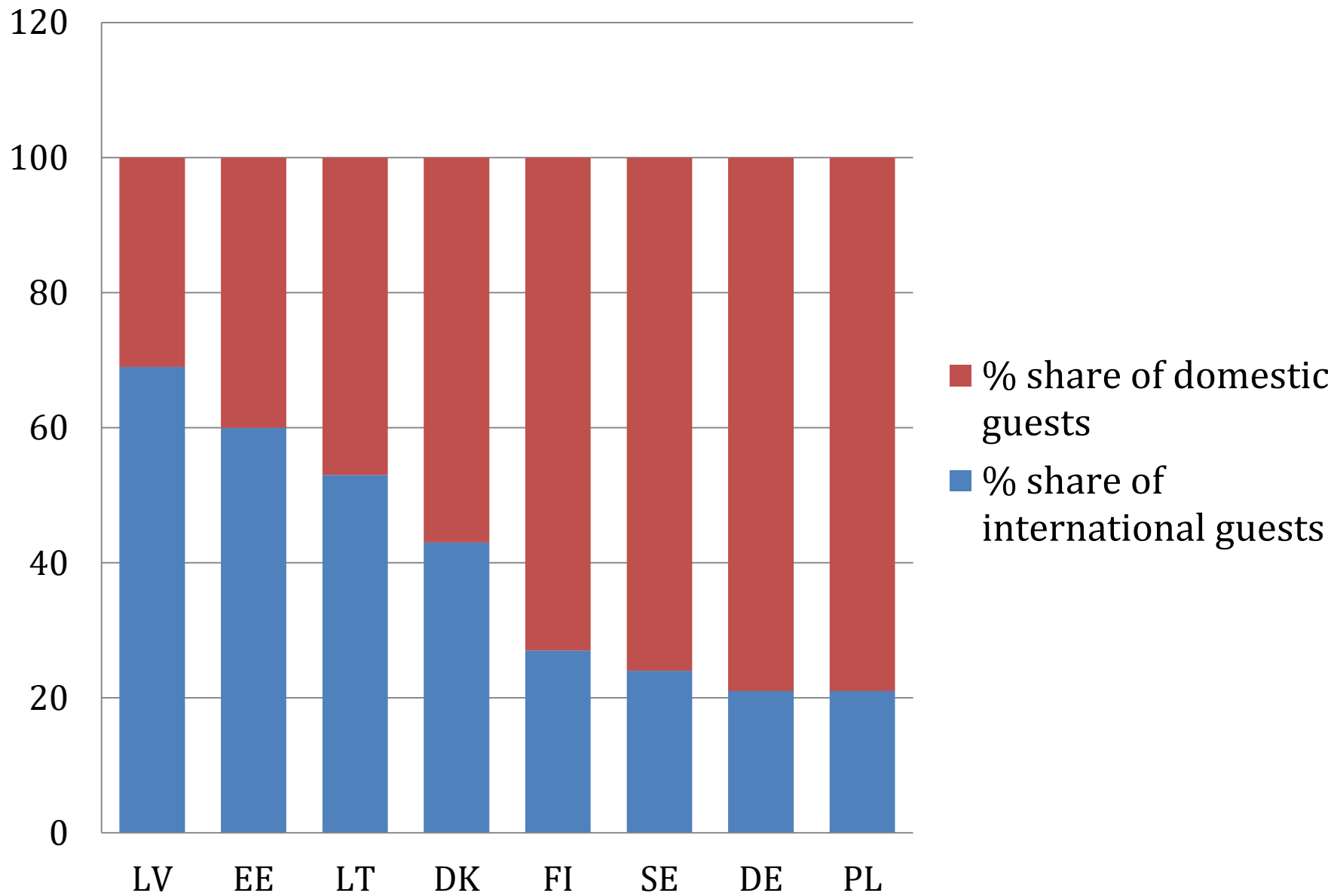


— Prioritization of T&T



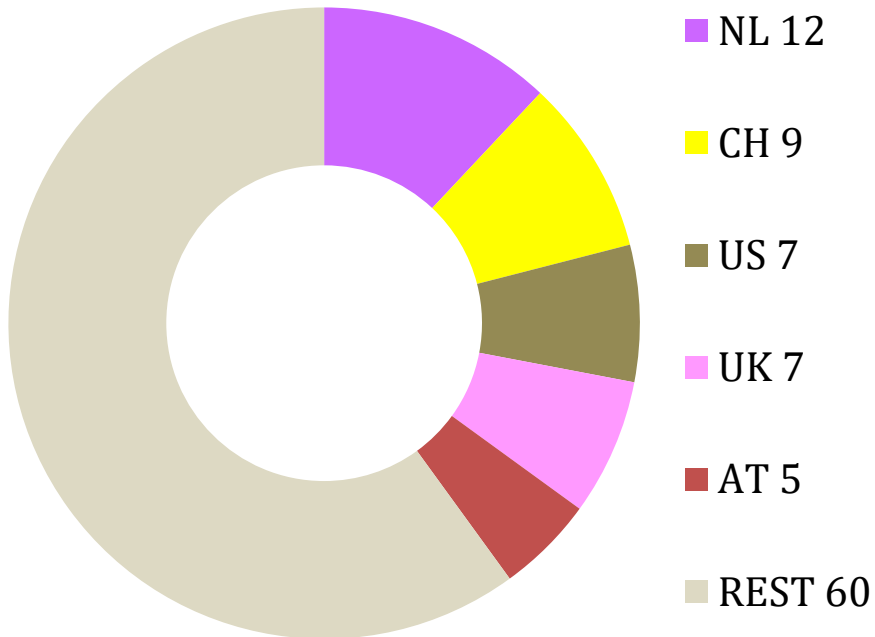
— Prioritization of T&T

— Tourist service infrastructure

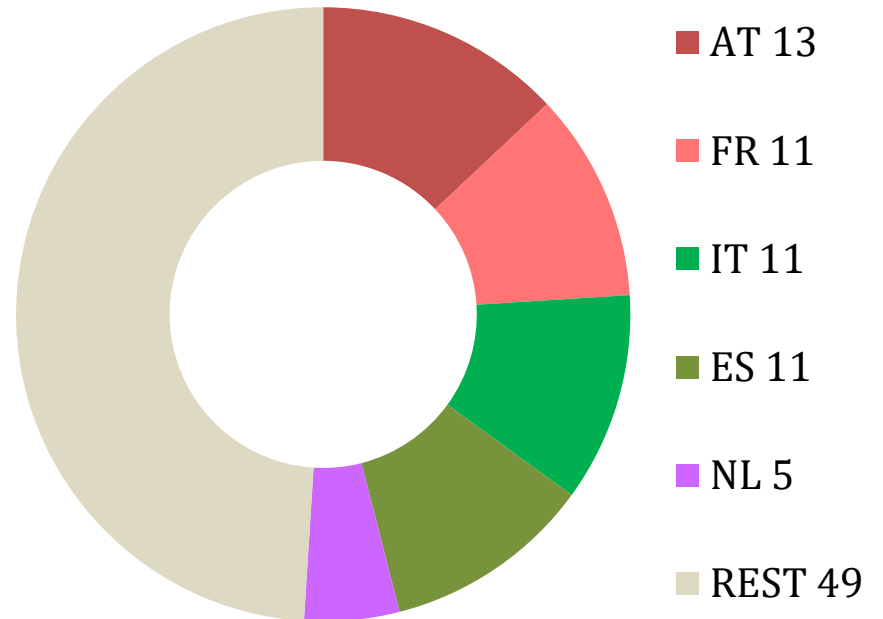


# Intraregional tourism flows

## DE Inbound arrivals (%)

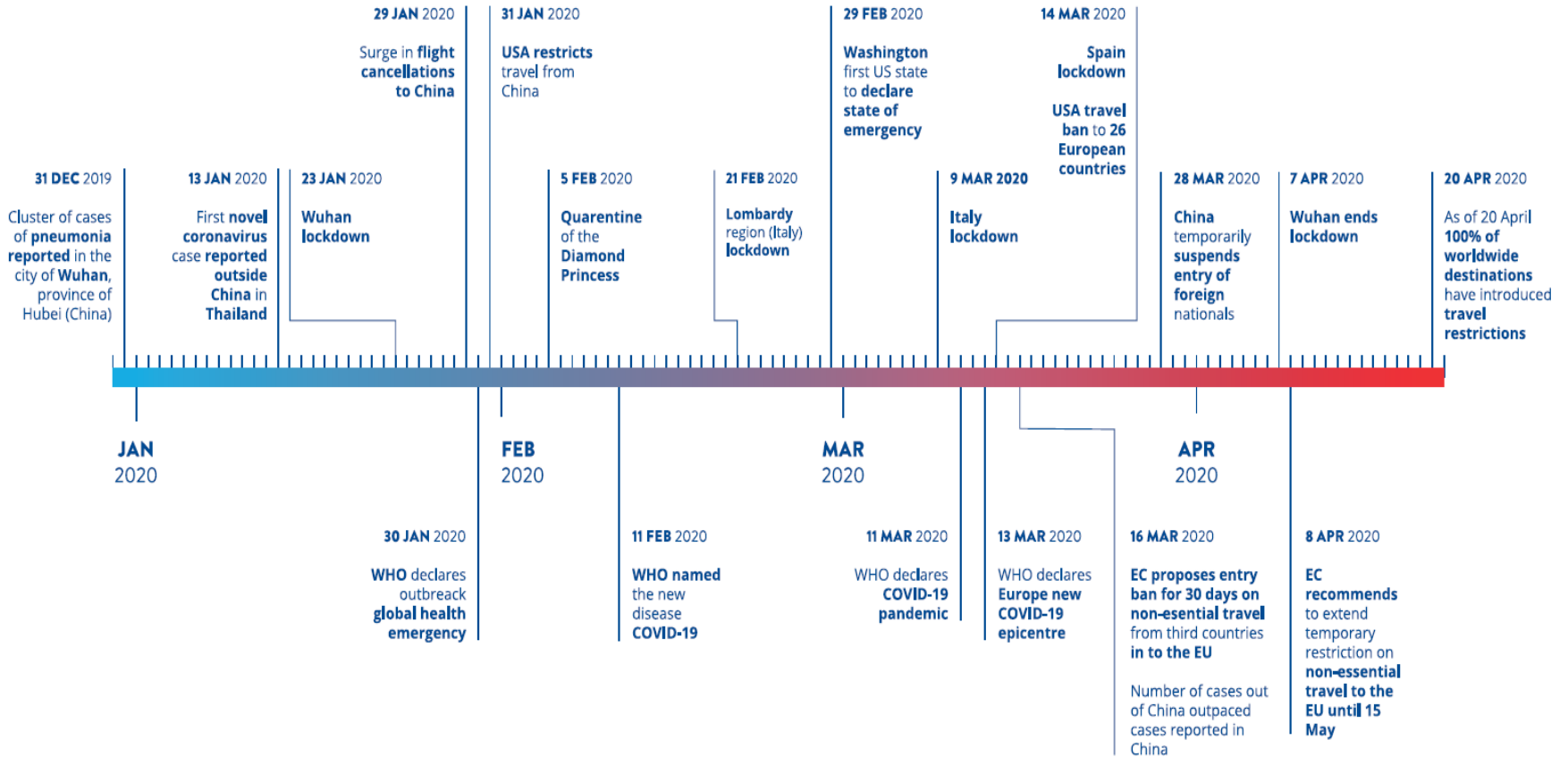


## DE Outbound departures (%)

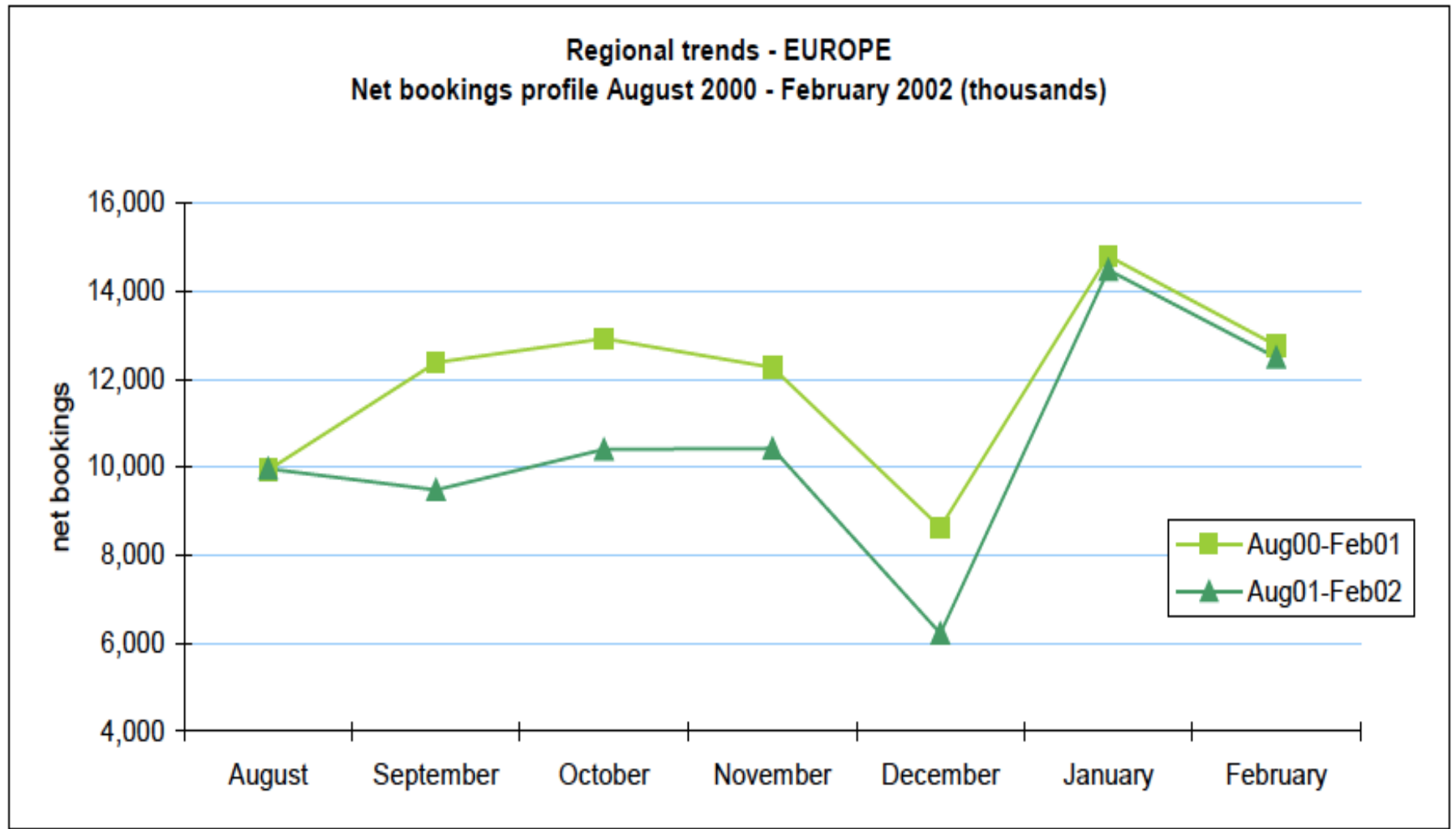




# COVID-19 timeline

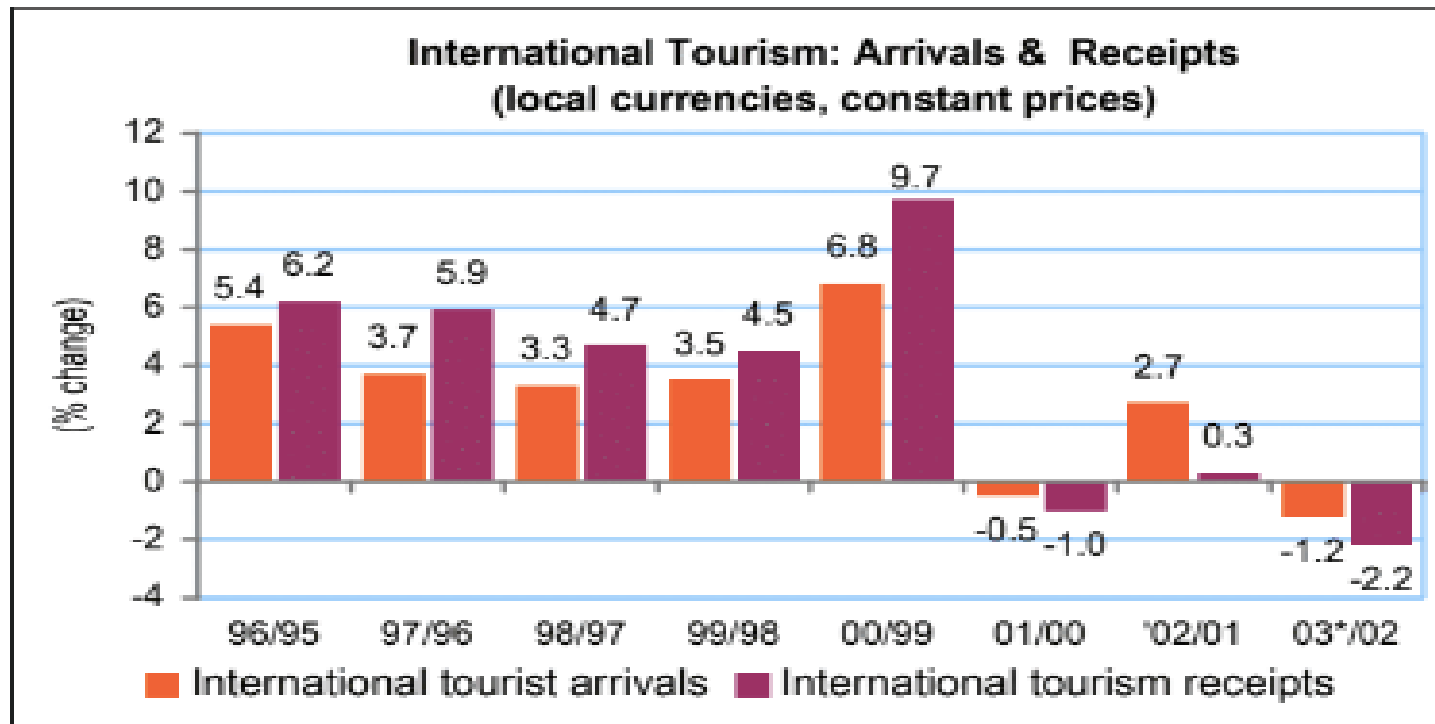


# Bookings recovery from Sep 11

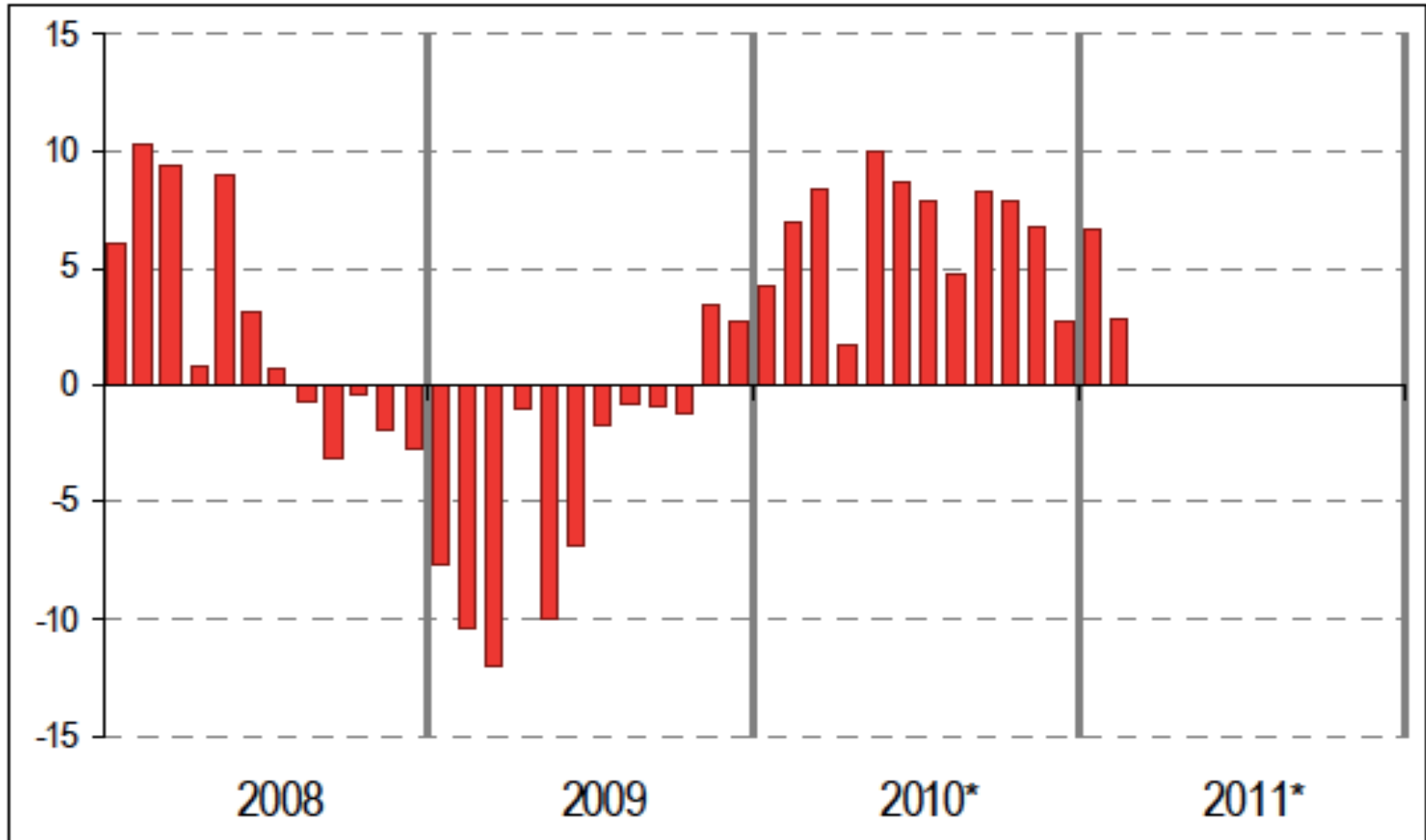




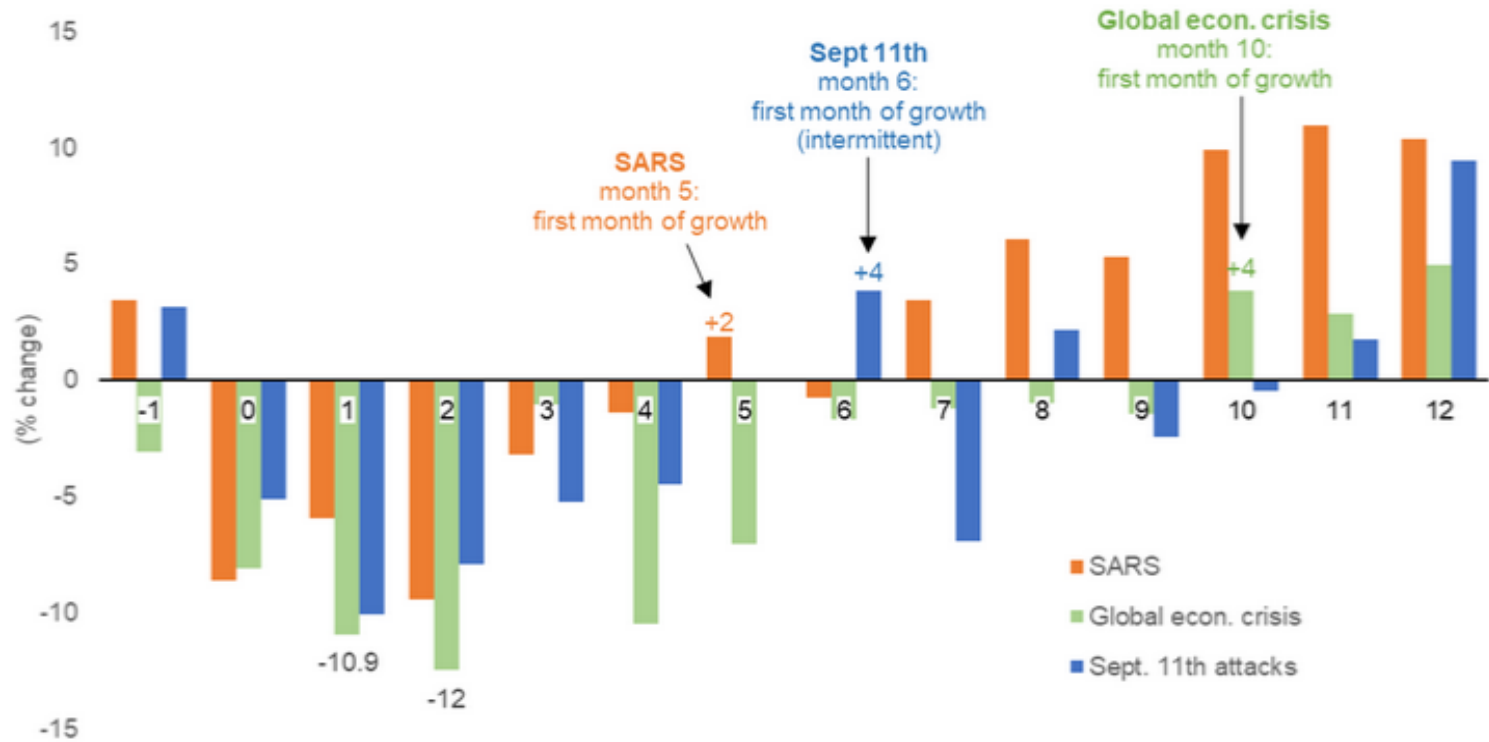
# $\Delta\%$ Arrivals & Receipts during SARS



# $\Delta\%$ Arrivals, Global Economic Crisis



**Of all crises, global arrivals returned to growth the fastest after SARS (5 months)**



Note: Month 0 for Sept 11th crisis = Sept. 2001; for SARS = March 2003; for Global economic crisis = Jan 2009. Source: UNWTO

# EVOLUTION OF TRAVEL RESTRICTIONS

9 MARCH



13 MARCH



24 MARCH



20 APRIL



# Mode of Transport

## Europe 2018

Please select a year

2018

Please select a region

Africa	<b>Europe</b>
Americas	Middle East
Asia and the Pacific	Not assigned



By region (share %)

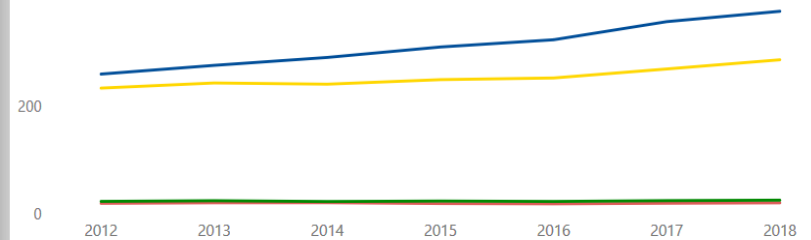
Transport Mode ● Air ● Rail ● Road ● Water



Europe

By transport mode (million)

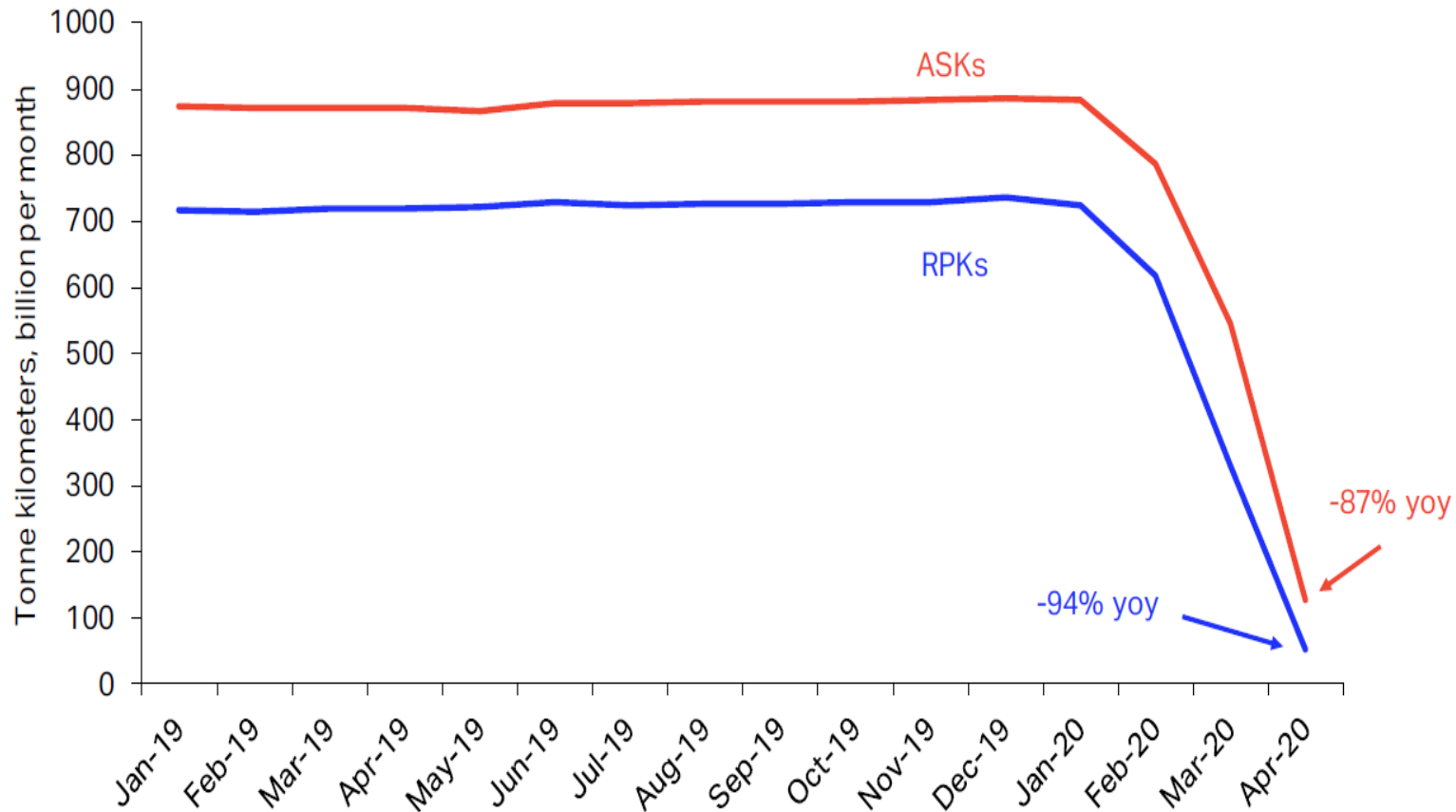
● Air ● Rail ● Road ● Water



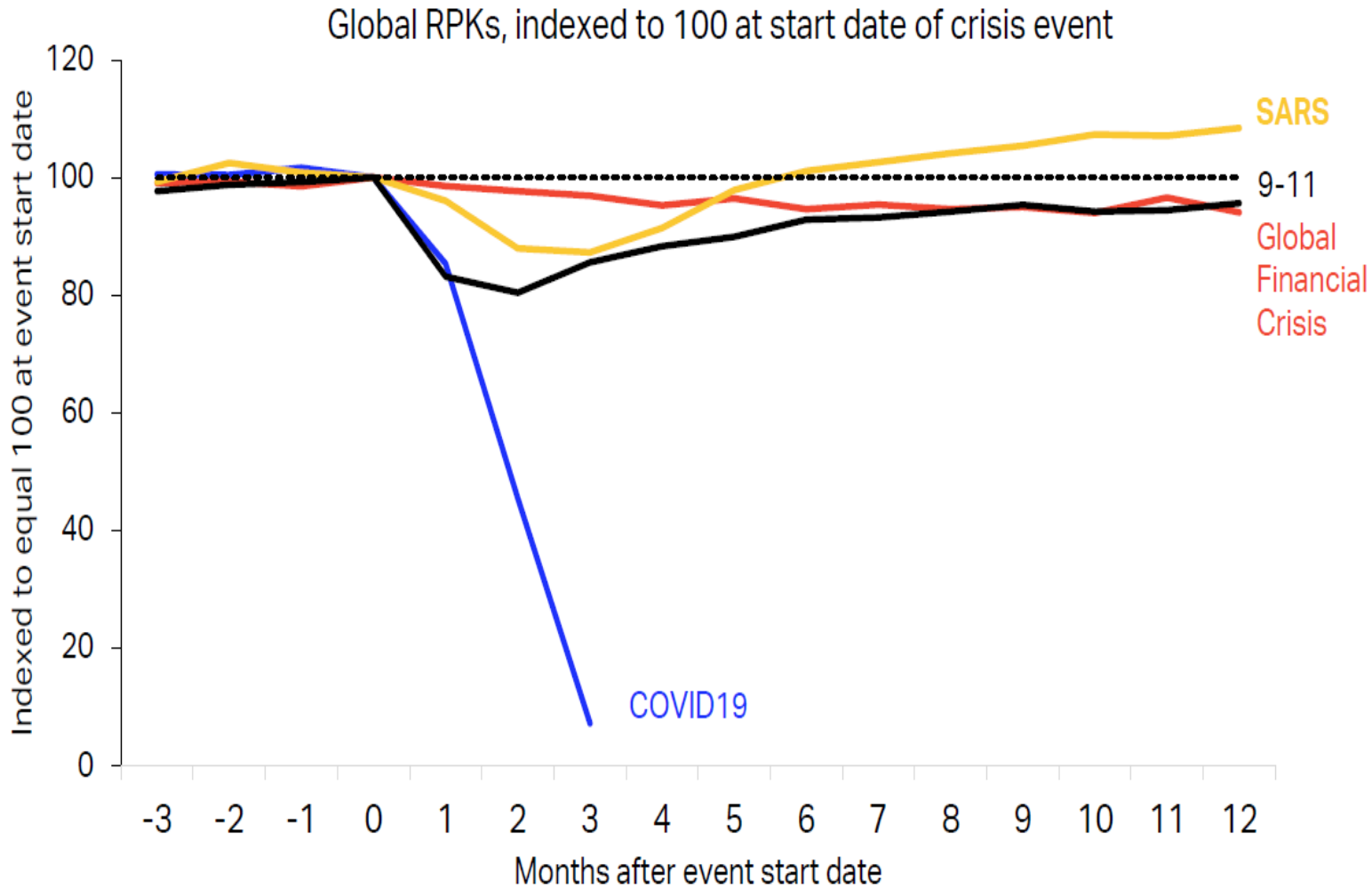
Average annual growth rate (%) since 2008



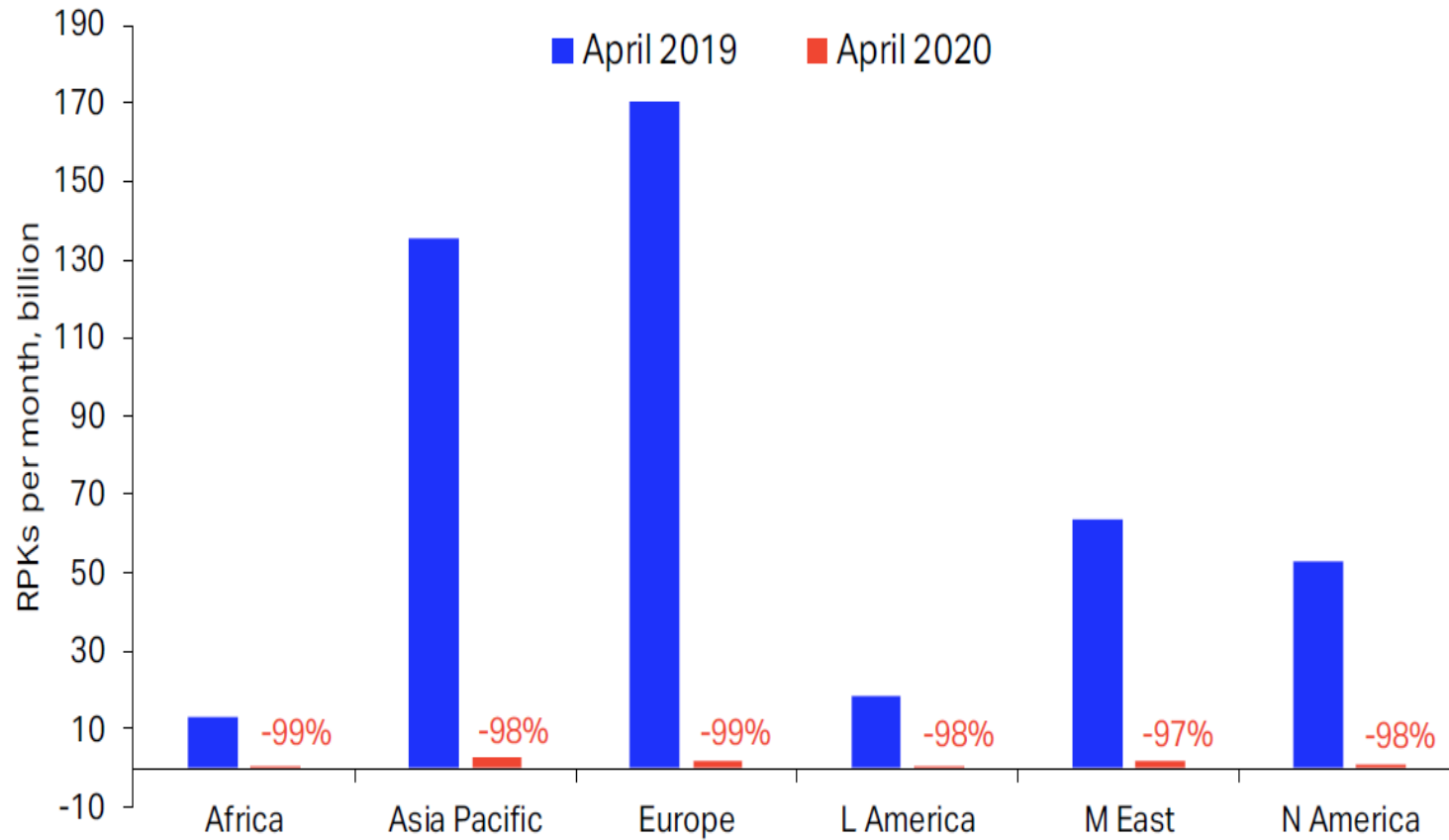
# Capacity(ASK) & Revenue (RPK)



# Depth of impact



# Revenue (RPKs)





# Flights traffic variation



Aviation Intelligence ▾

Daily Traffic Variation

States ▾

ACCs ▾

Airports ▾

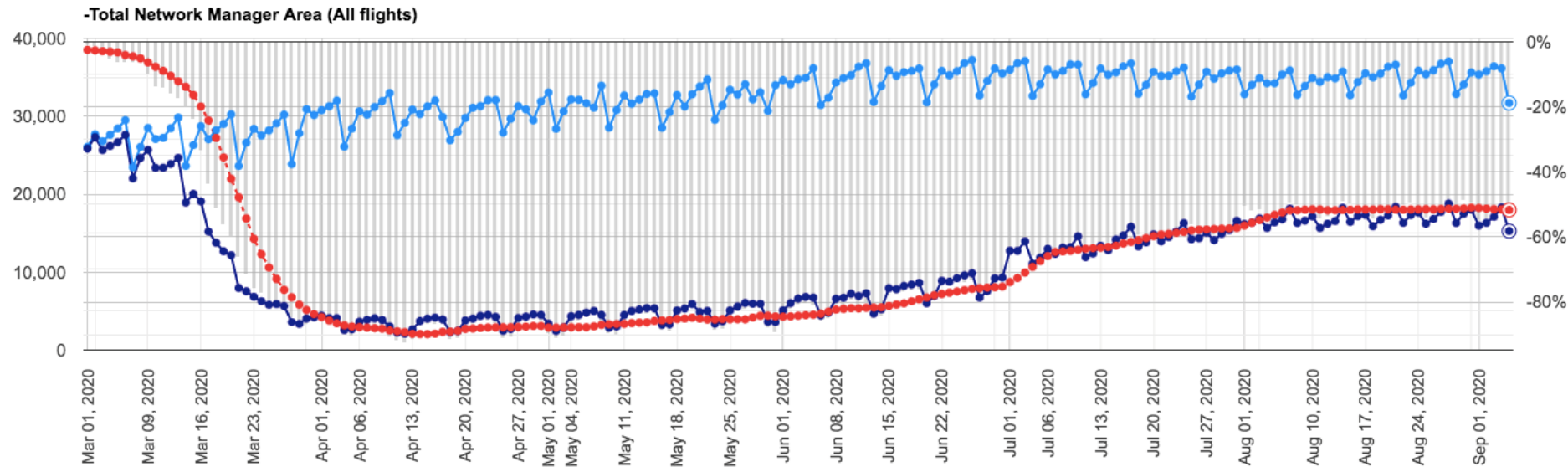
Aircraft Operators ▾

Motion Charts

## Daily Traffic Variation - States

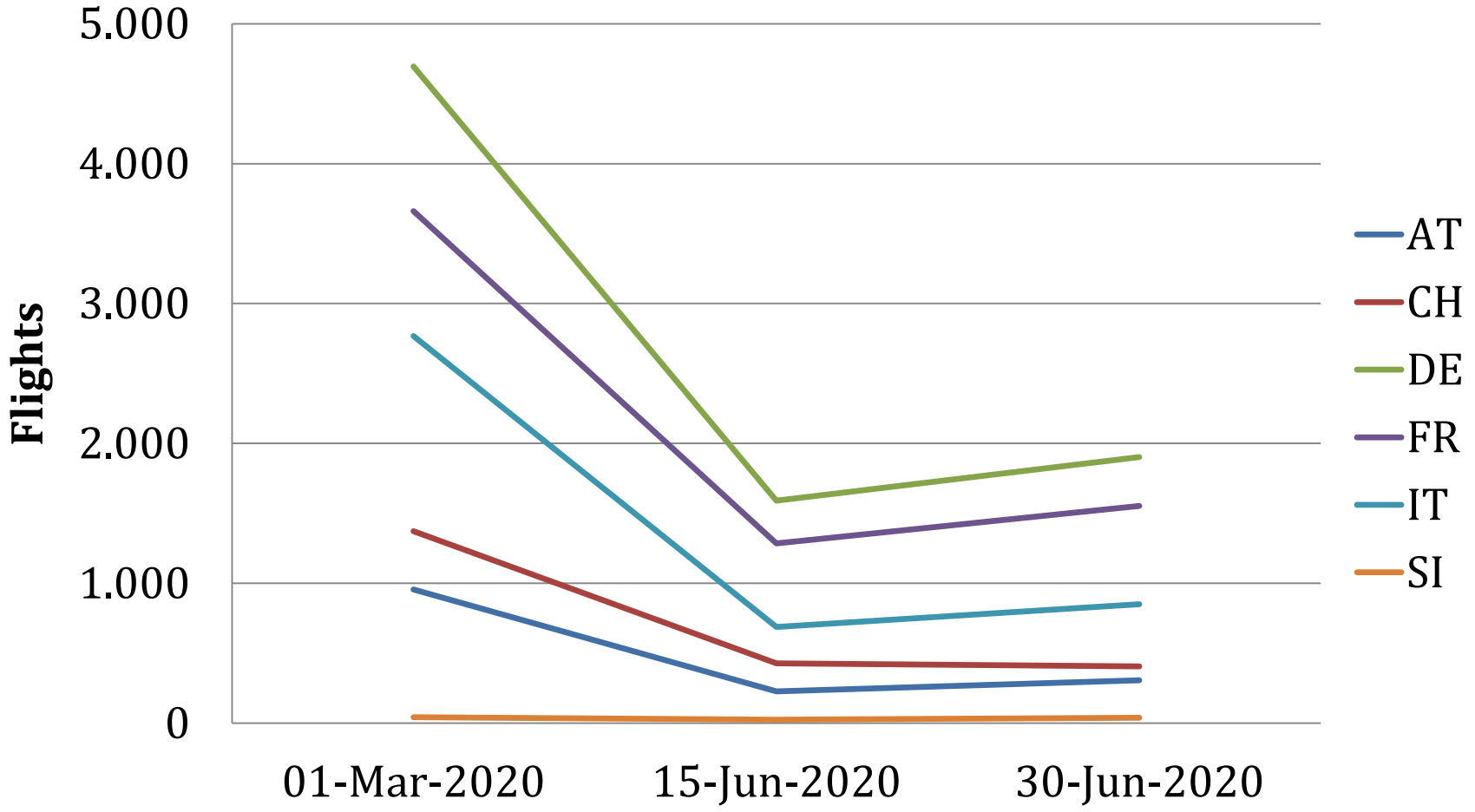
Select State:

Select Indicator:



# Number of flights variation

## EUSALP



# COVID-19 “tourist season”



## International Tourist Arrivals (monthly)



Europe

January - May

2020

Please select a year

2020



Region

Europe

Middle East

Country grouping

All

YTD change over previous year

**-58**  
%

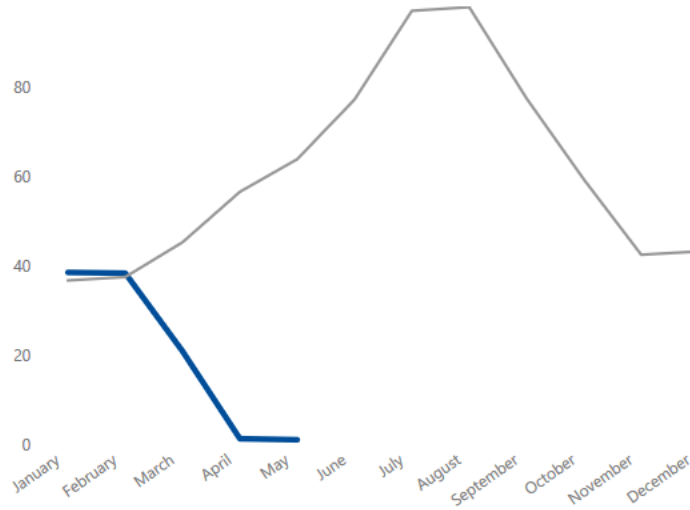
Year-to-date change by region (%)



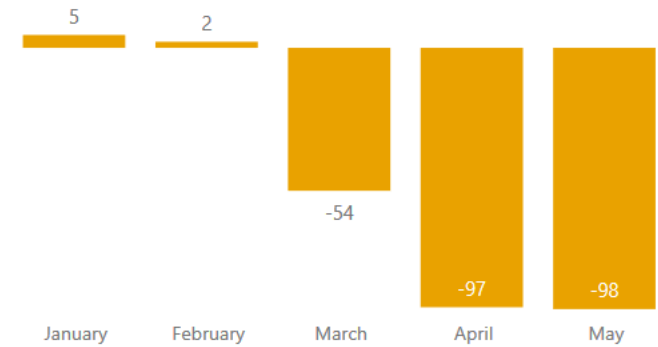
Europe

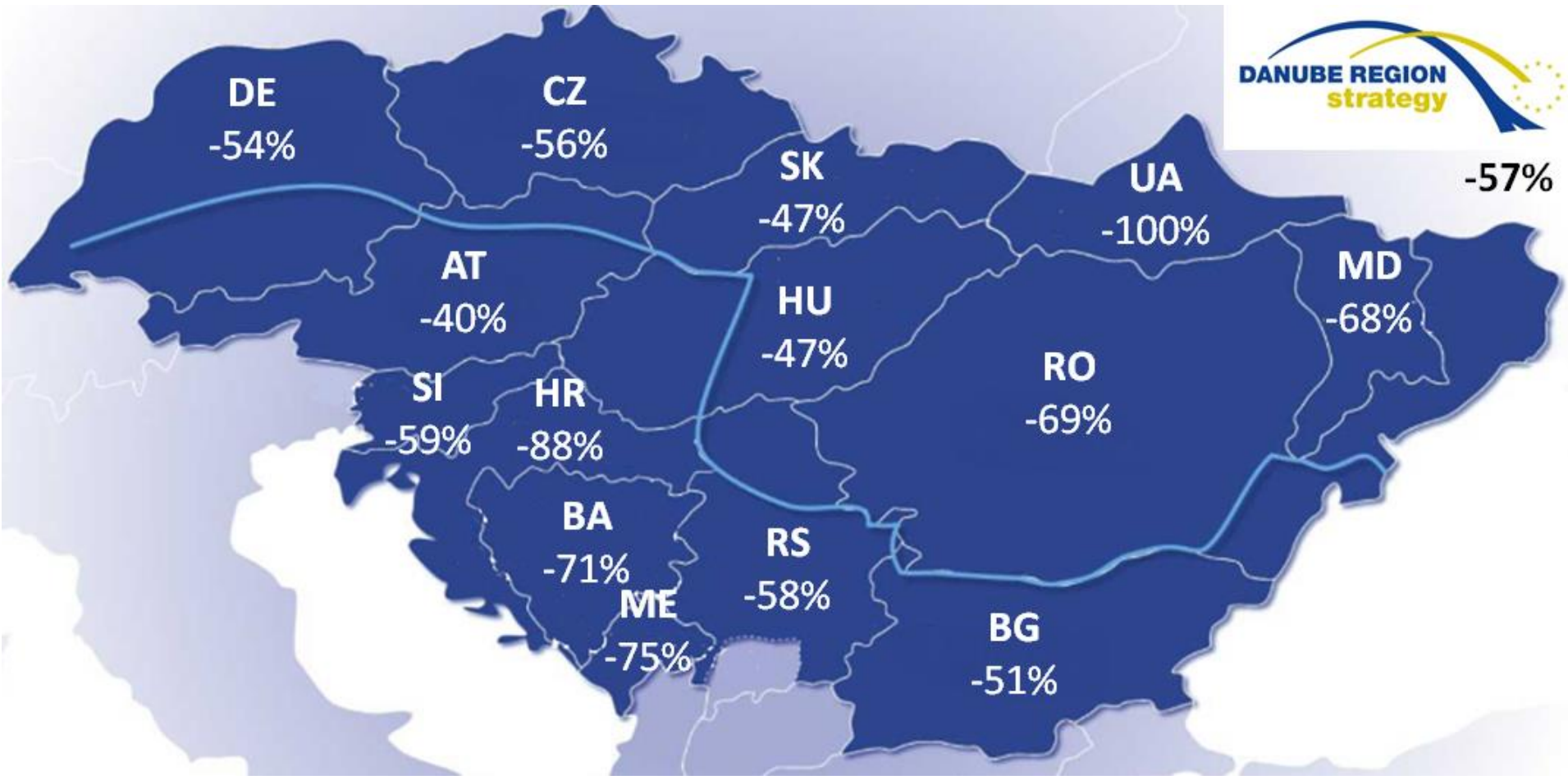
International tourist arrivals (million)

Selected year Previous year



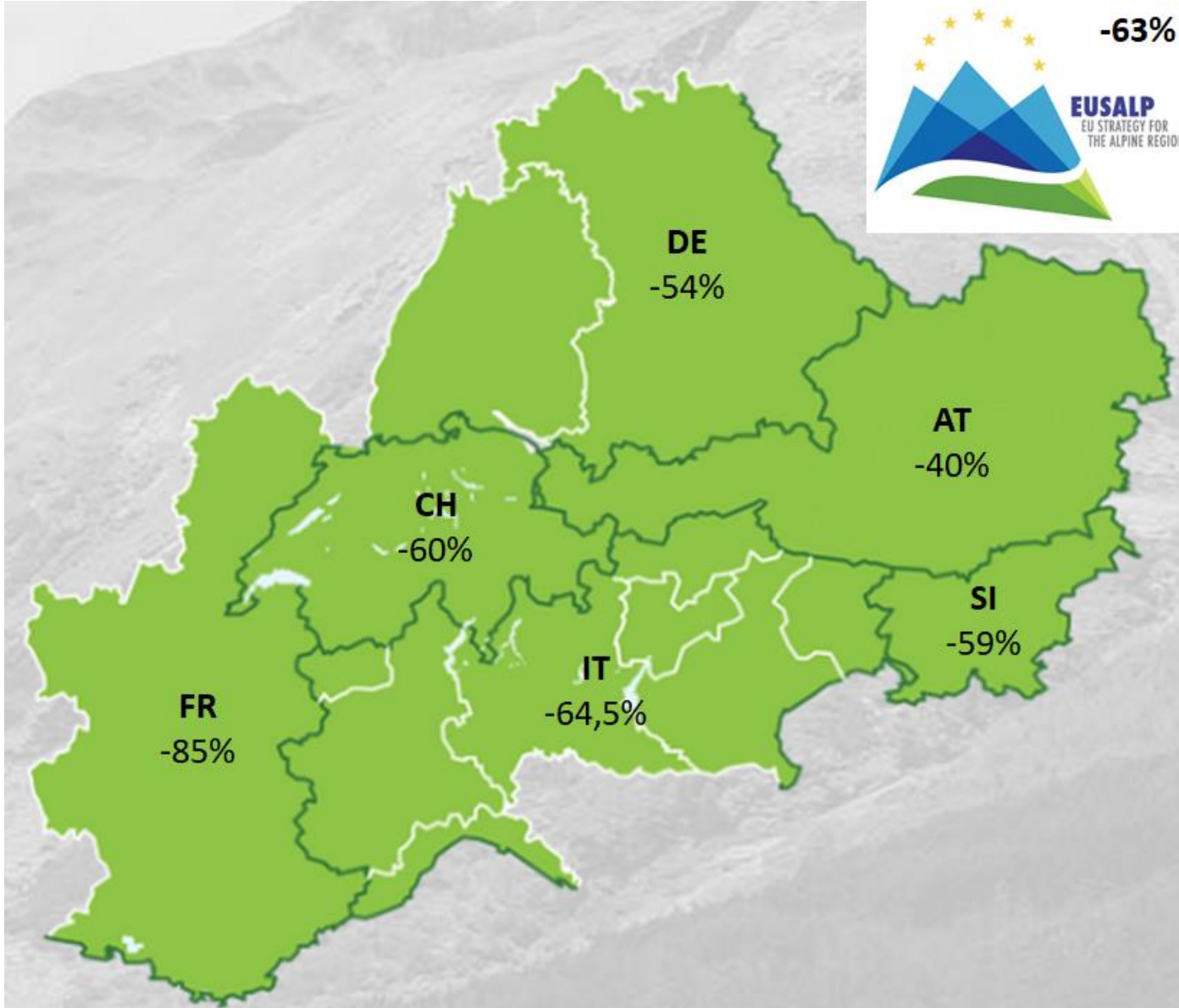
Monthly change (%)





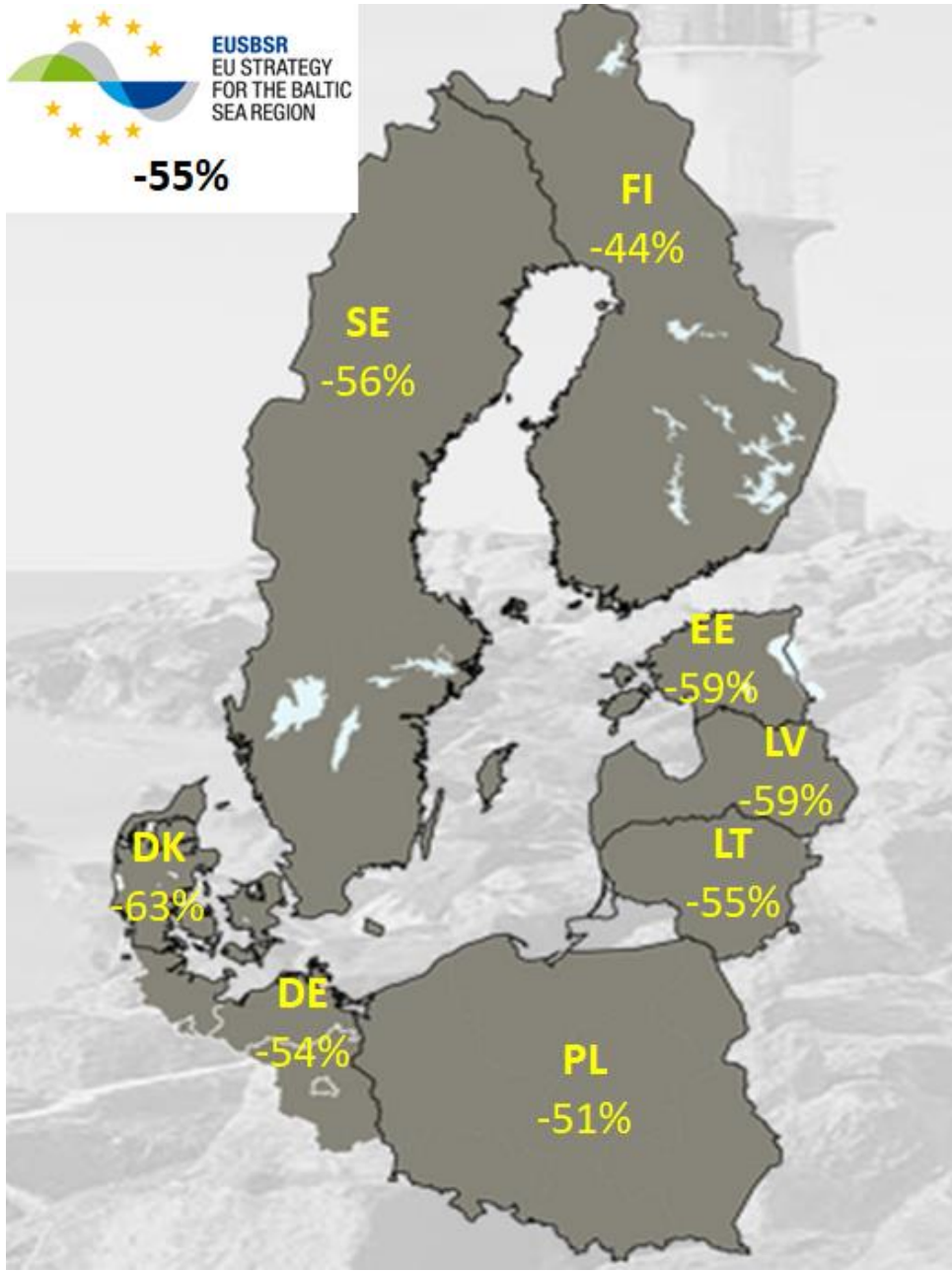




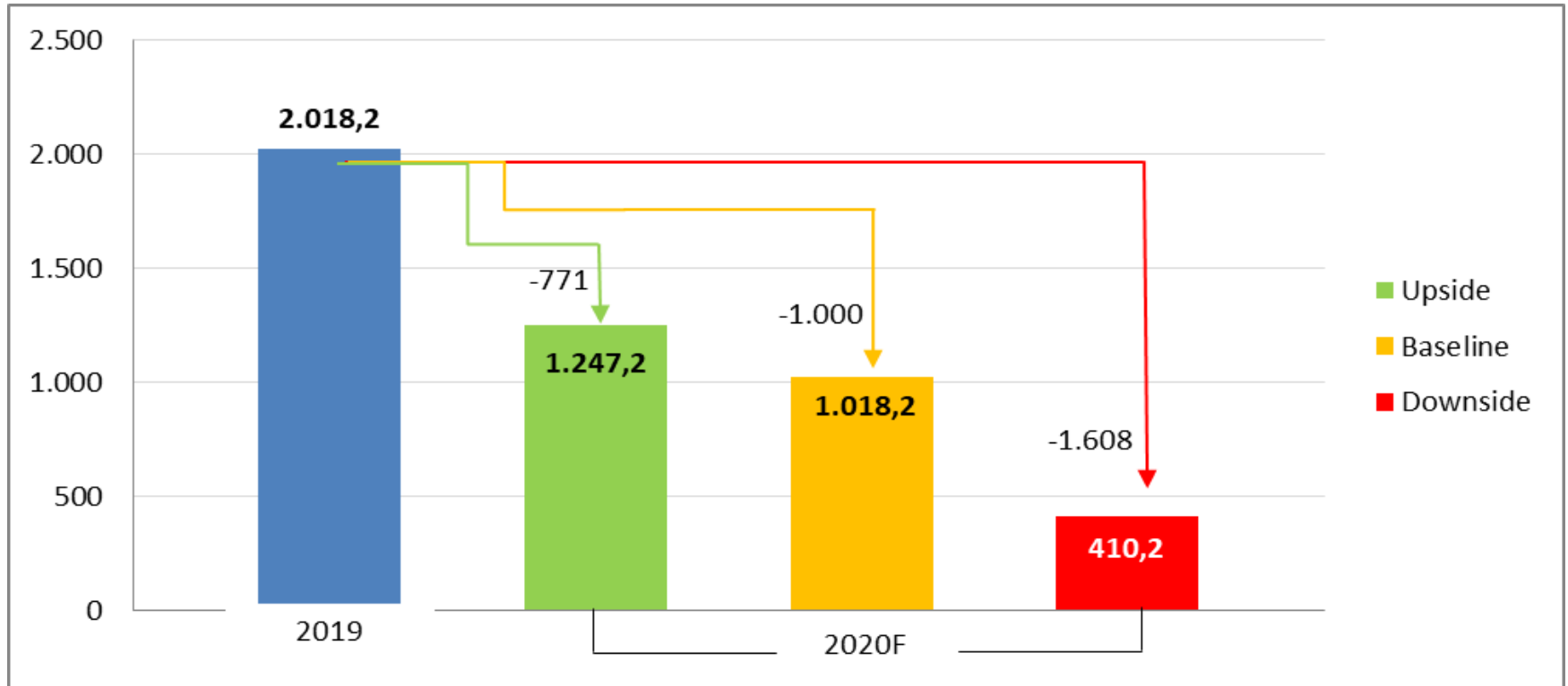




**-55%**

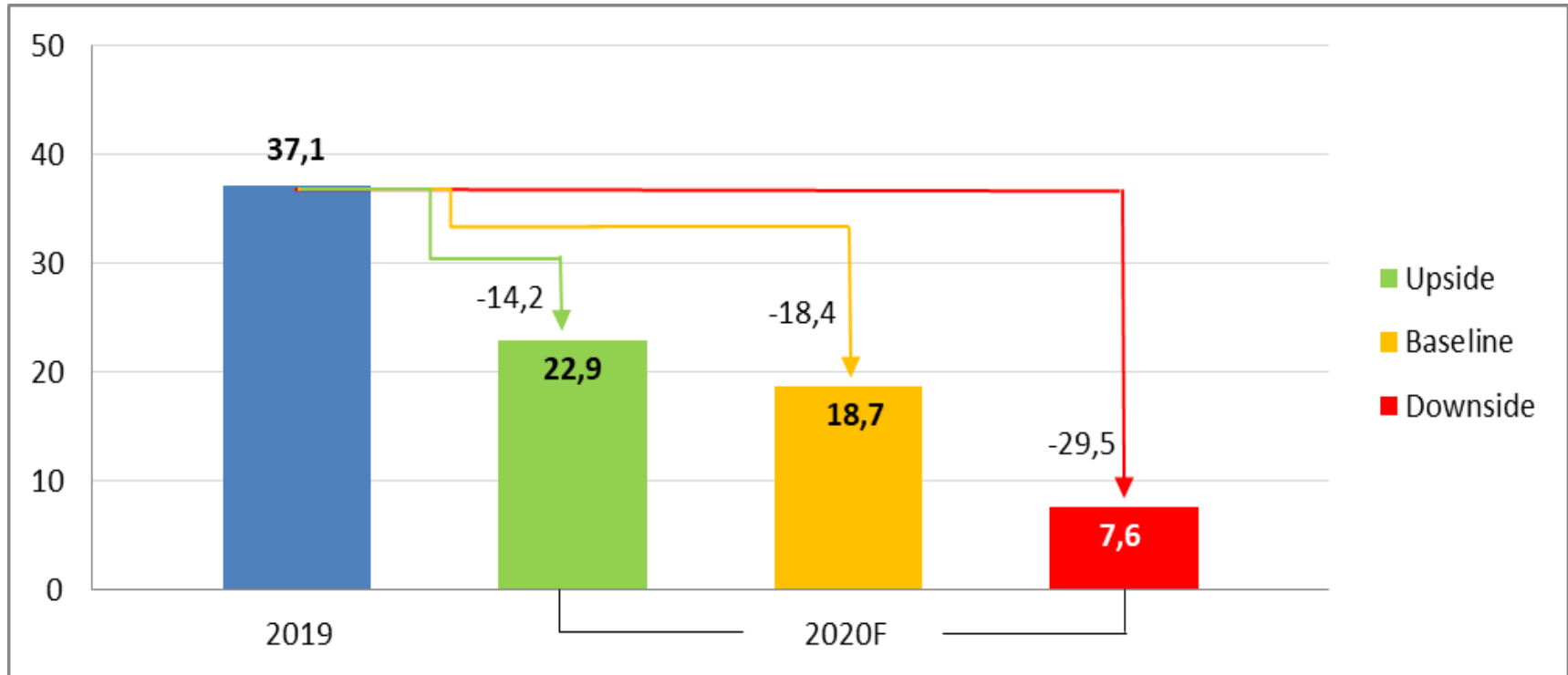


# Total T&T GDP loss projection Europe 2020, US\$

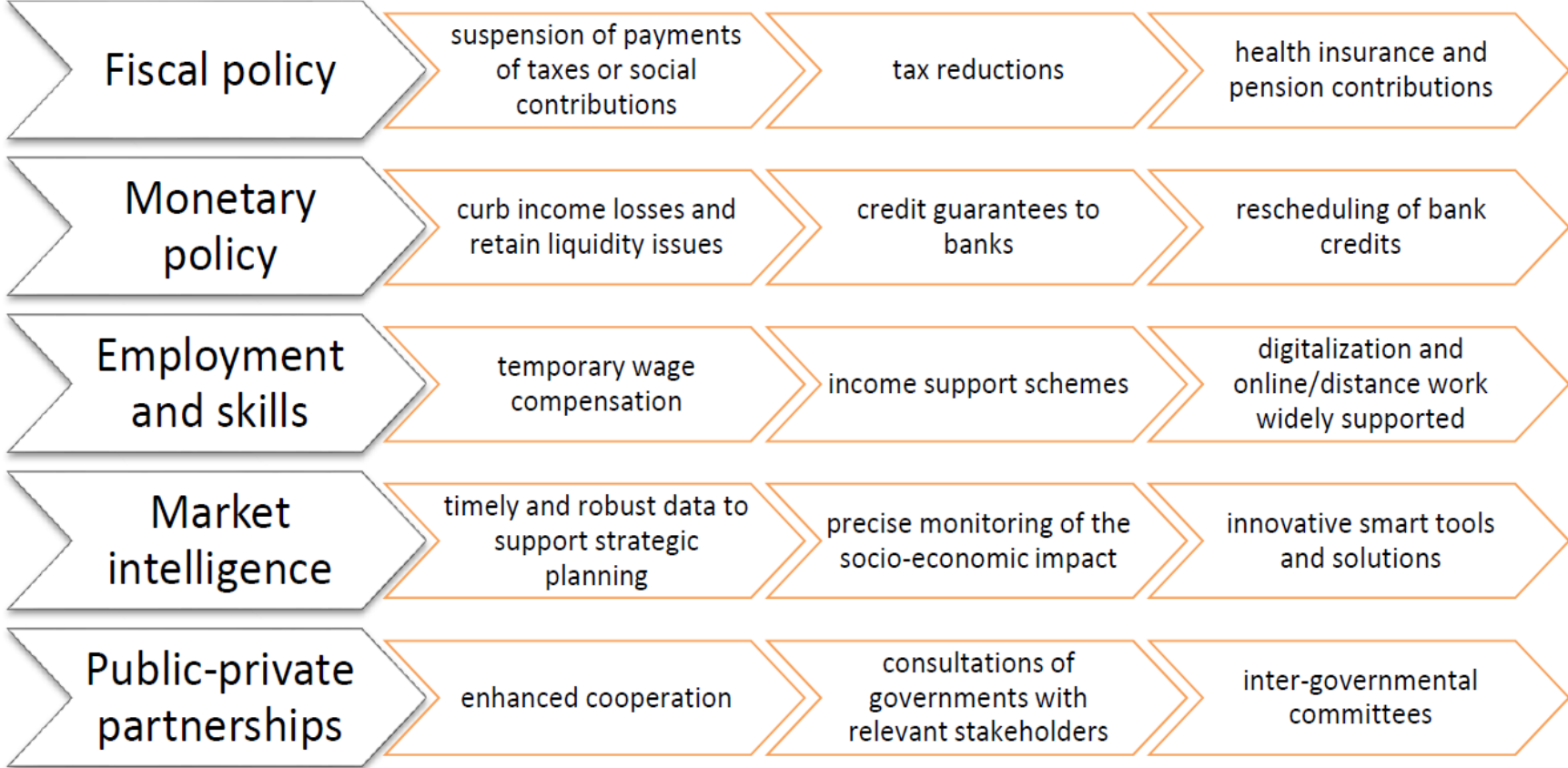




# Total T&T job loss projections Europe 2020 (mi.)



# COVID-19 response measures



# COVID-19 response measures

Temporary Framework for State aid measures

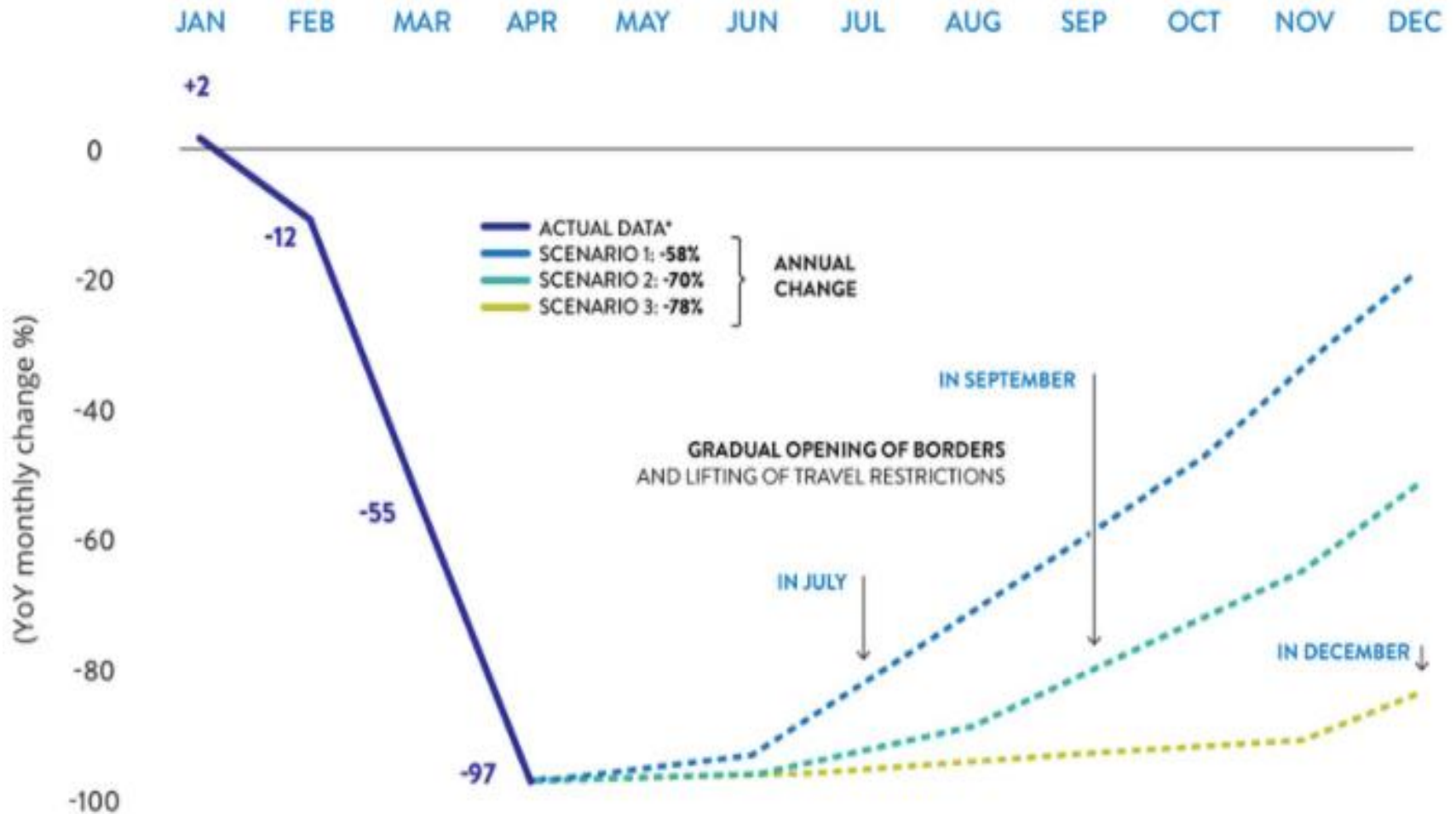
Coronavirus Response Investment Initiative (CRII)

Temporary Support to mitigate Unemployment Risks in an Emergency (SURE)

European Globalisation Adjustment Fund

Source: DG GROW

# Int tourist arrivals 2020

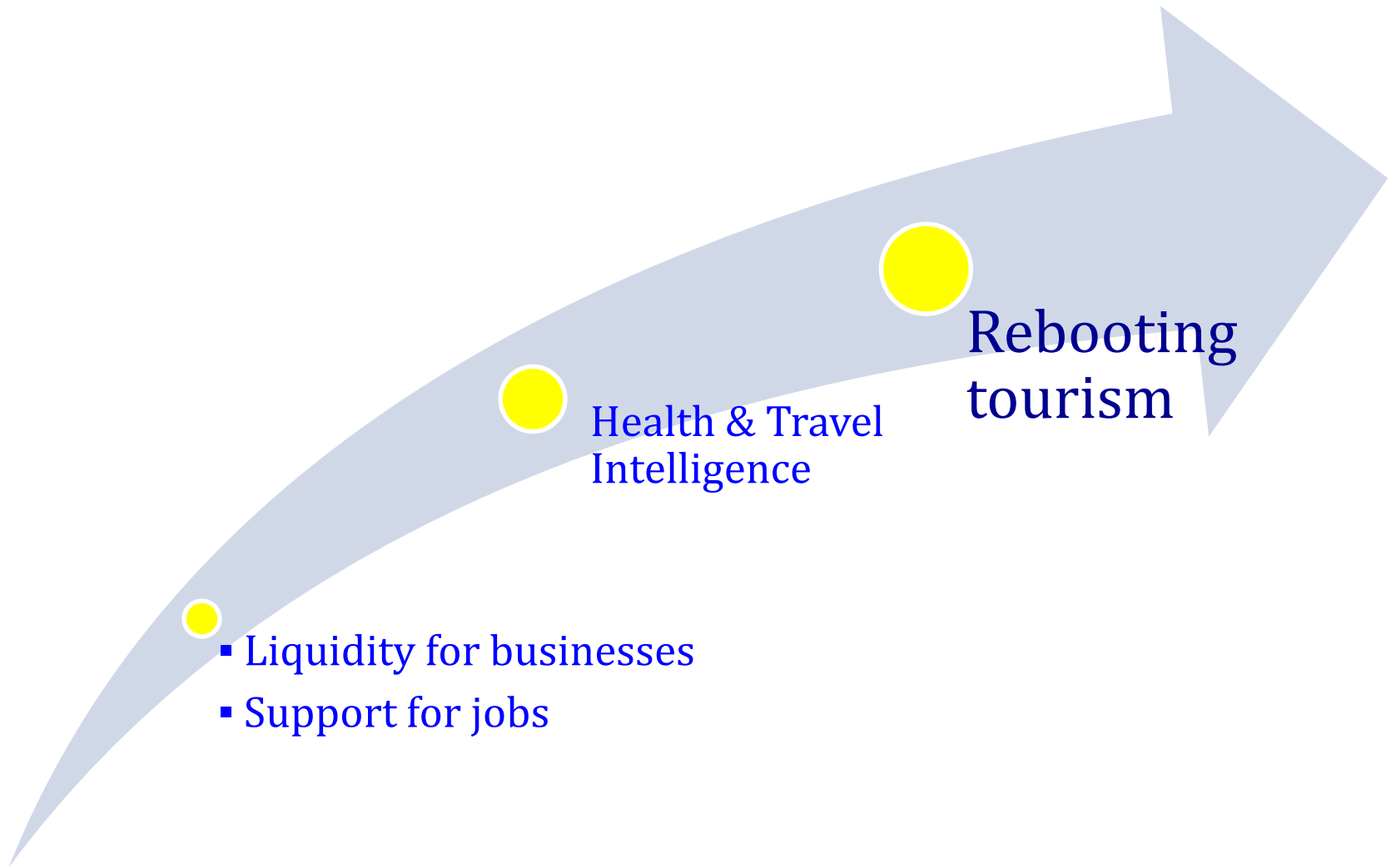


\* Actual data through April includes estimates for countries which have not yet reported results.

# Restarting



# Recommendations & measures



- Liquidity for businesses
- Support for jobs

Health & Travel  
Intelligence

Rebooting  
tourism

## Level of readiness - Crisis Mgt - Cooperation



**Tourism**  
Manifesto

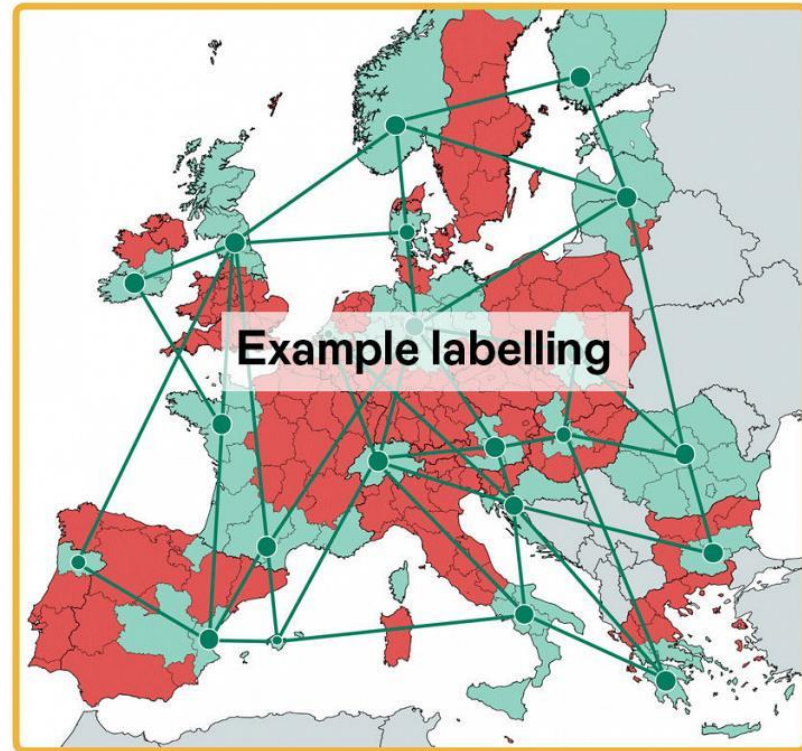
**URGES EU GOVERNMENTS TO:**

- Establish common criteria & thresholds for epidemiological risk
- Implement common measures upon departure to & return from risk areas, incl:
  - Replacing quarantine with testing and tracing
  - Avoiding blanket restrictions to free movement with targeted measures instead
  - Avoiding travel restrictions on passengers in transit
- Publish clear, comprehensive & timely information about any travel restrictions where necessary

# Survey

- Travel restrictions
- Travel Intelligence
- Health Intelligence
- Decline in demand
- Job losses

We propose that the Schengen members that are not in the EU would also join the green-zone travelling network.





# Recommendations & Measures

EU wide



MRS specific

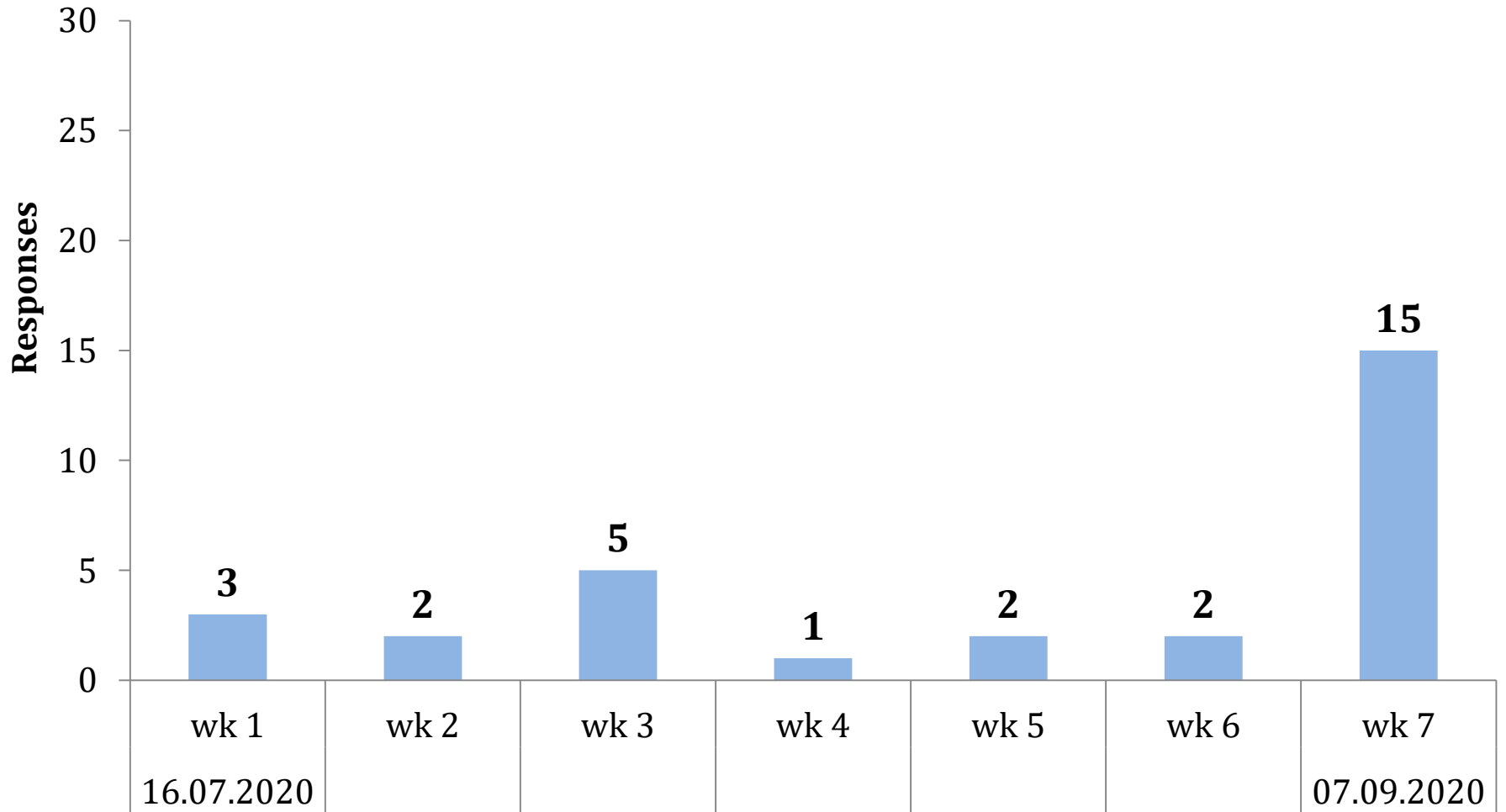


# Completed questionnaires

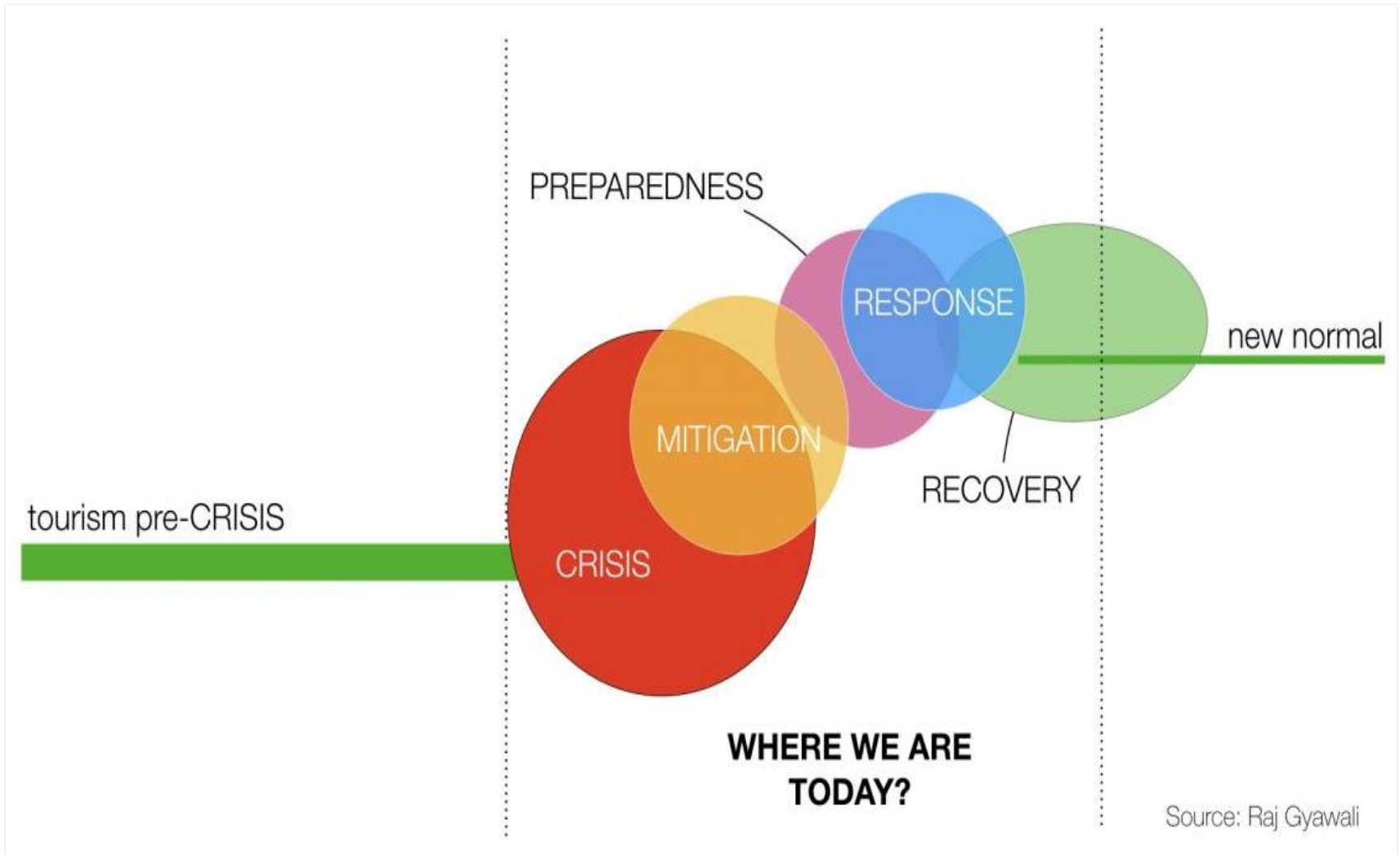
<b>MRS</b>	<b>No. of Qs</b>
<b>EUSAIR</b>	<b>8</b>
<b>EUSALP</b>	<b>5</b>
<b>EUSBSR</b>	<b>5</b>
<b>EUSDR</b>	<b>12</b>
<b>Total</b>	<b>30</b>

# E-survey responses

**MRS**



# Towards the “new normal”





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European Territorial Cooperation, Macro-regions, Interreg and Programme Implementation I

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[www.tourism-generis.com](http://www.tourism-generis.com)