



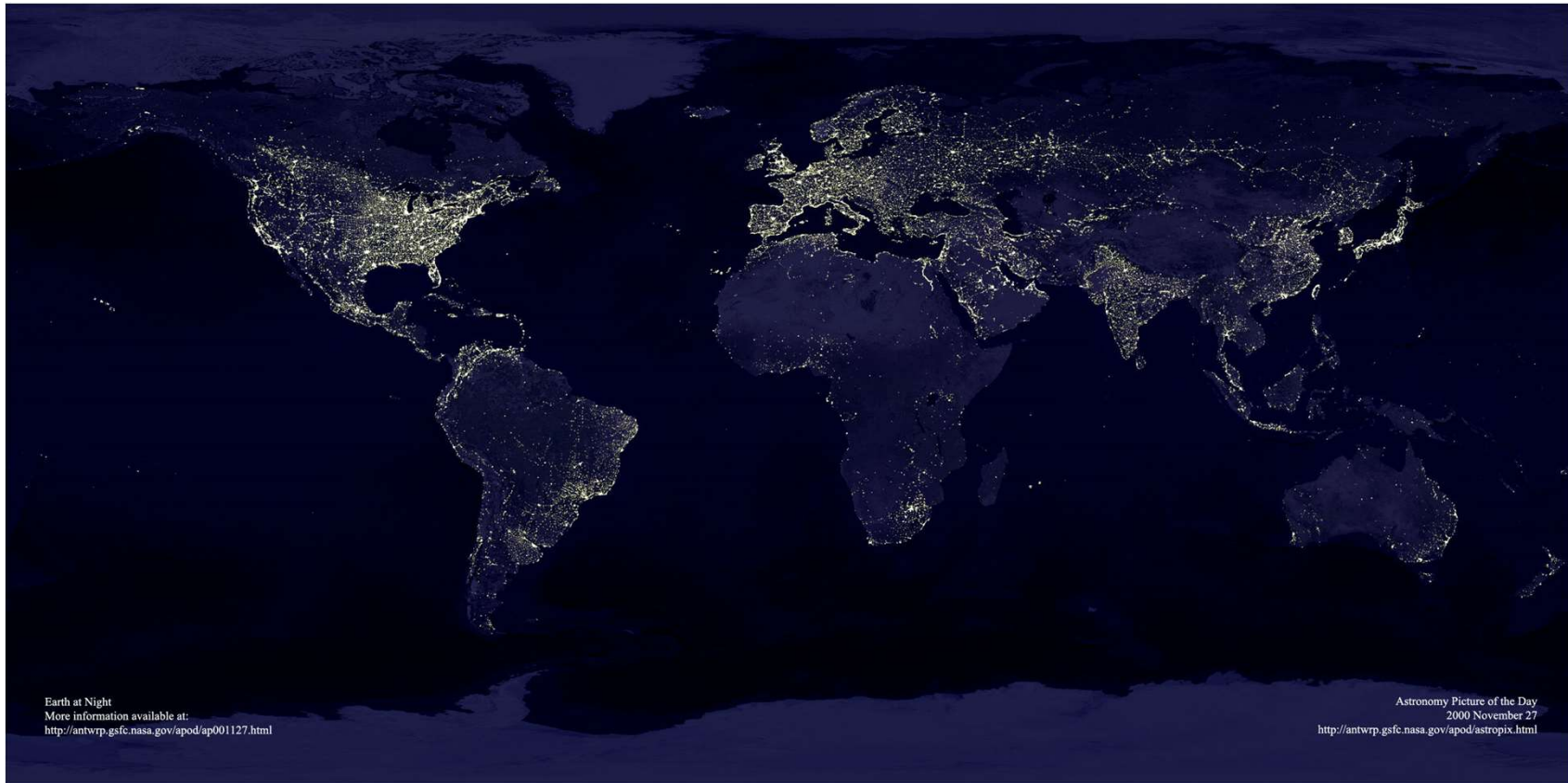
# The impact of COVID-19 on tourist operations and evaluation of recovery strategies through scenario analysis

Prof Dr Antonio Roldan-Ponce  
University of Applied Sciences Dresden

Regional Development between Theory and Practice  
Impact of the covid 19 pandemic on the development of Europe's regions  
11th Annual Professional Conference  
19 May 2022  
Masaryk Institute of advanced Studies CTU in Prague



# Globalization



Earth at Night  
More information available at:  
<http://antwrp.gsfc.nasa.gov/apod/ap001127.html>

Astronomy Picture of the Day  
2000 November 27  
<http://antwrp.gsfc.nasa.gov/apod/astropix.html>



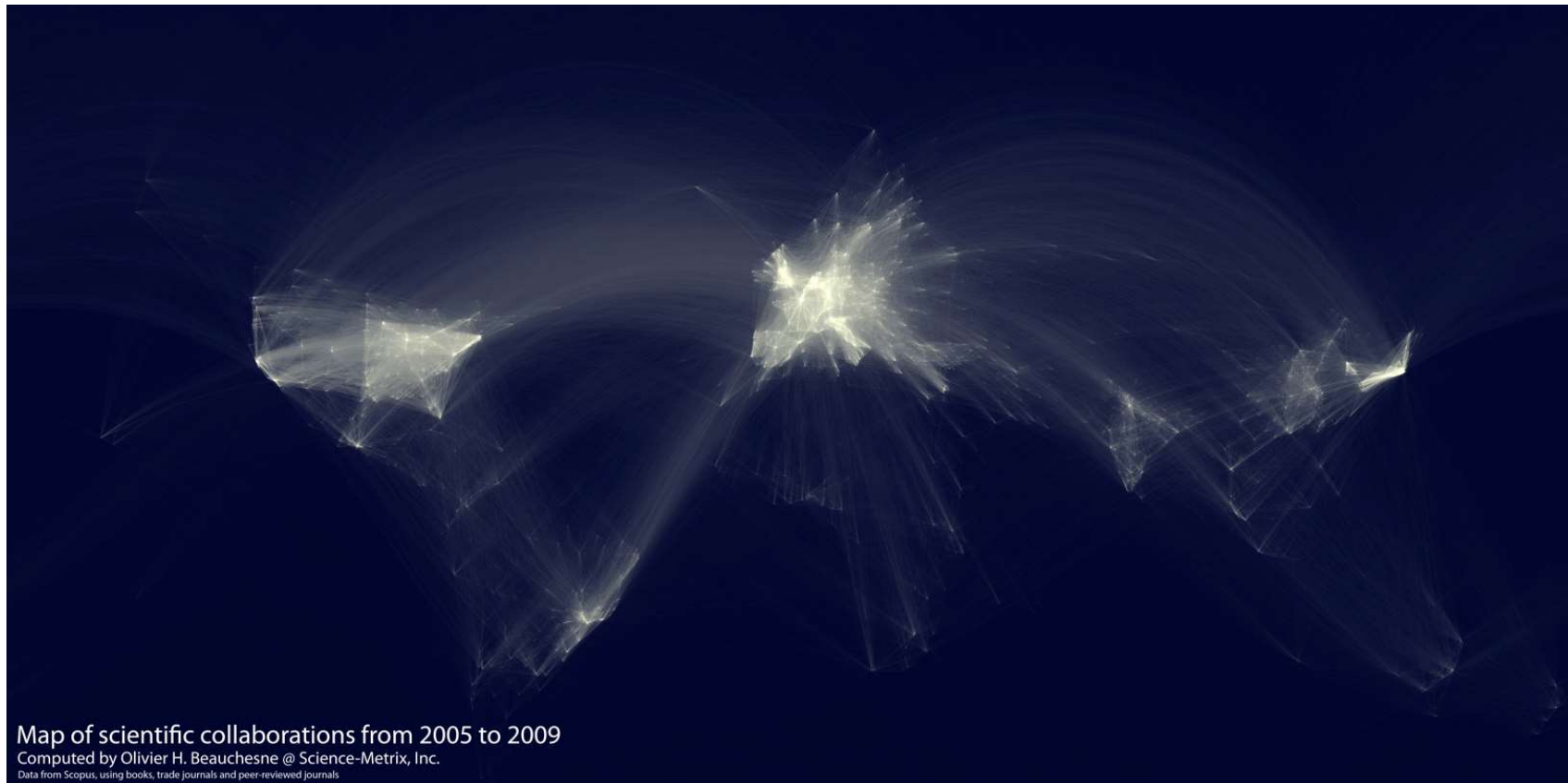


# Globalization





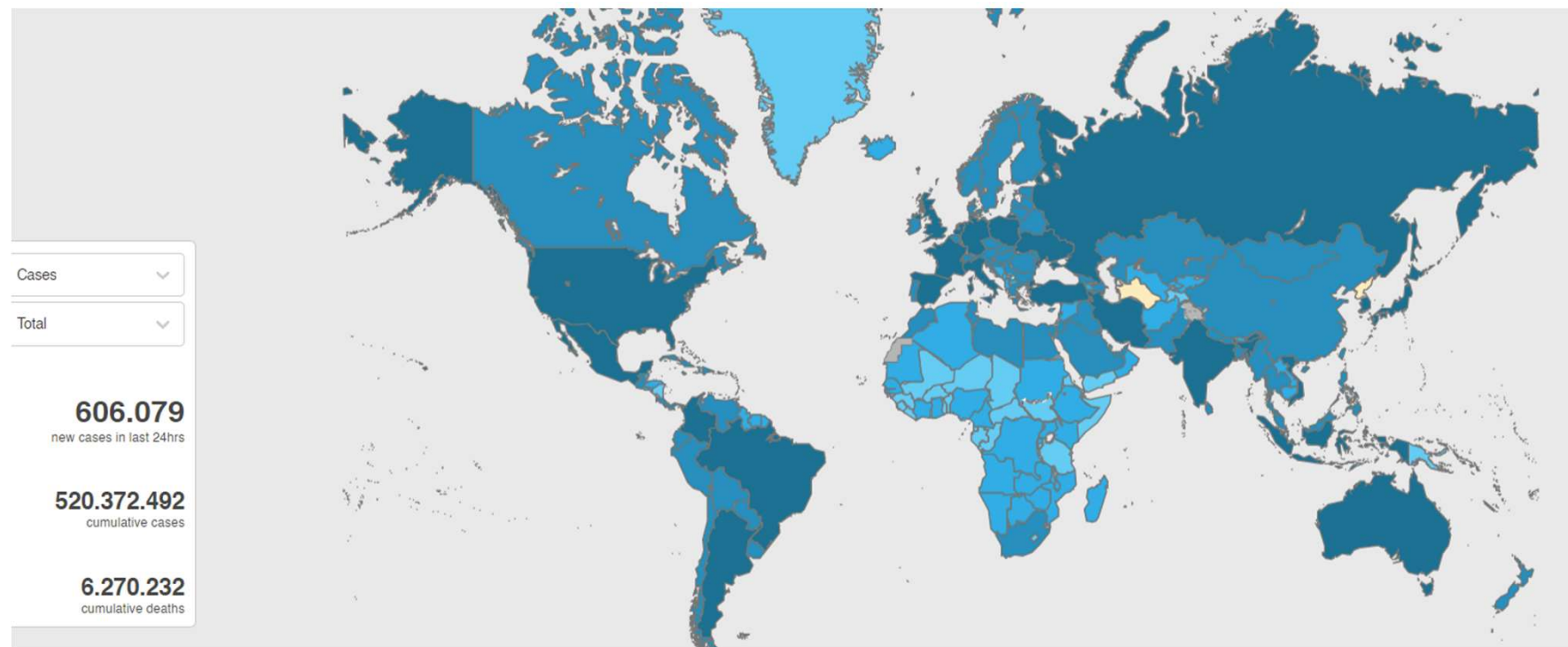
## Scientific Publications





## Impact COVID-19: WHO Coronavirus (COVID-19) Dashboard

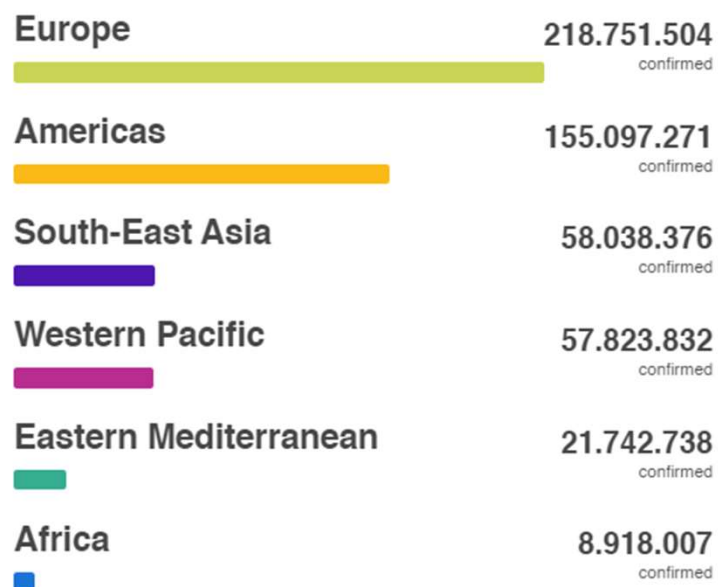
Globally, as of 7:41pm CEST, 18 May 2022, there have been 520.372.492 confirmed cases of COVID-19, including 6.270.232 deaths, reported to WHO. As of 15 May 2022, a total of 11.660.363.722 vaccine doses have been administered.



Source: <https://covid19.who.int/>

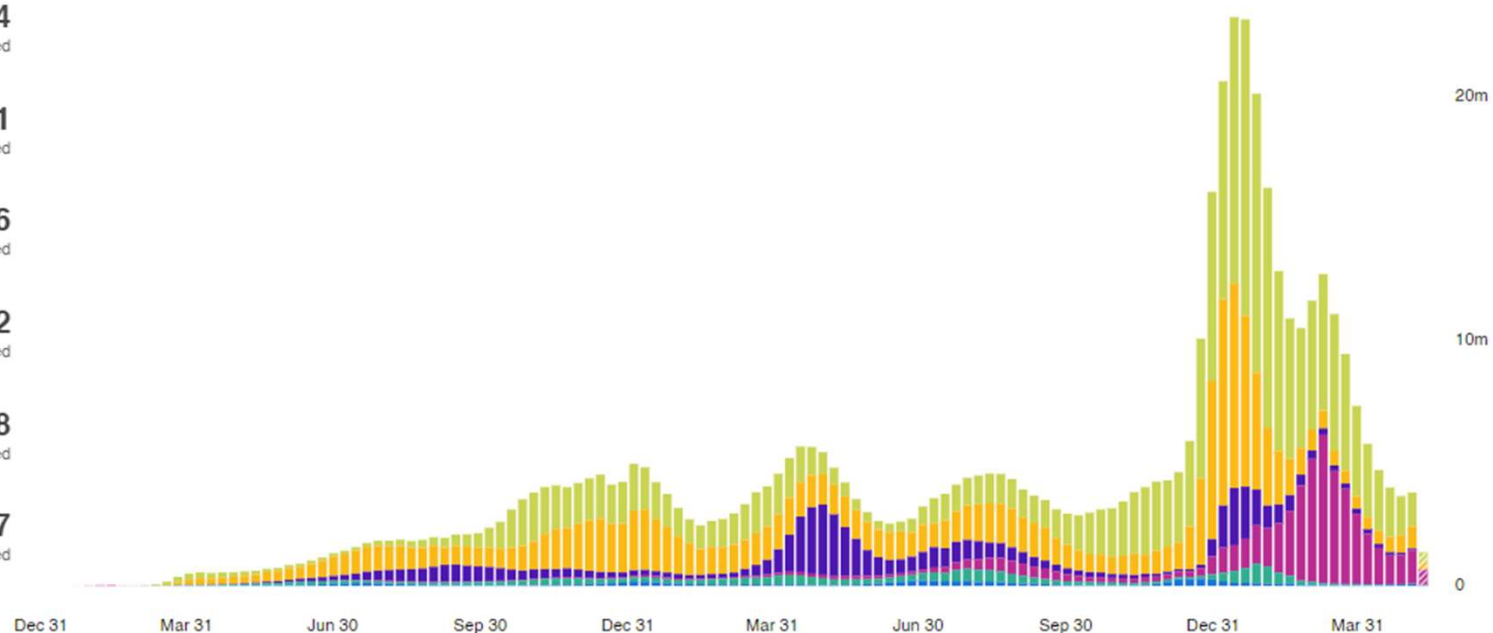


## Impact COVID-19: Situation by WHO Region



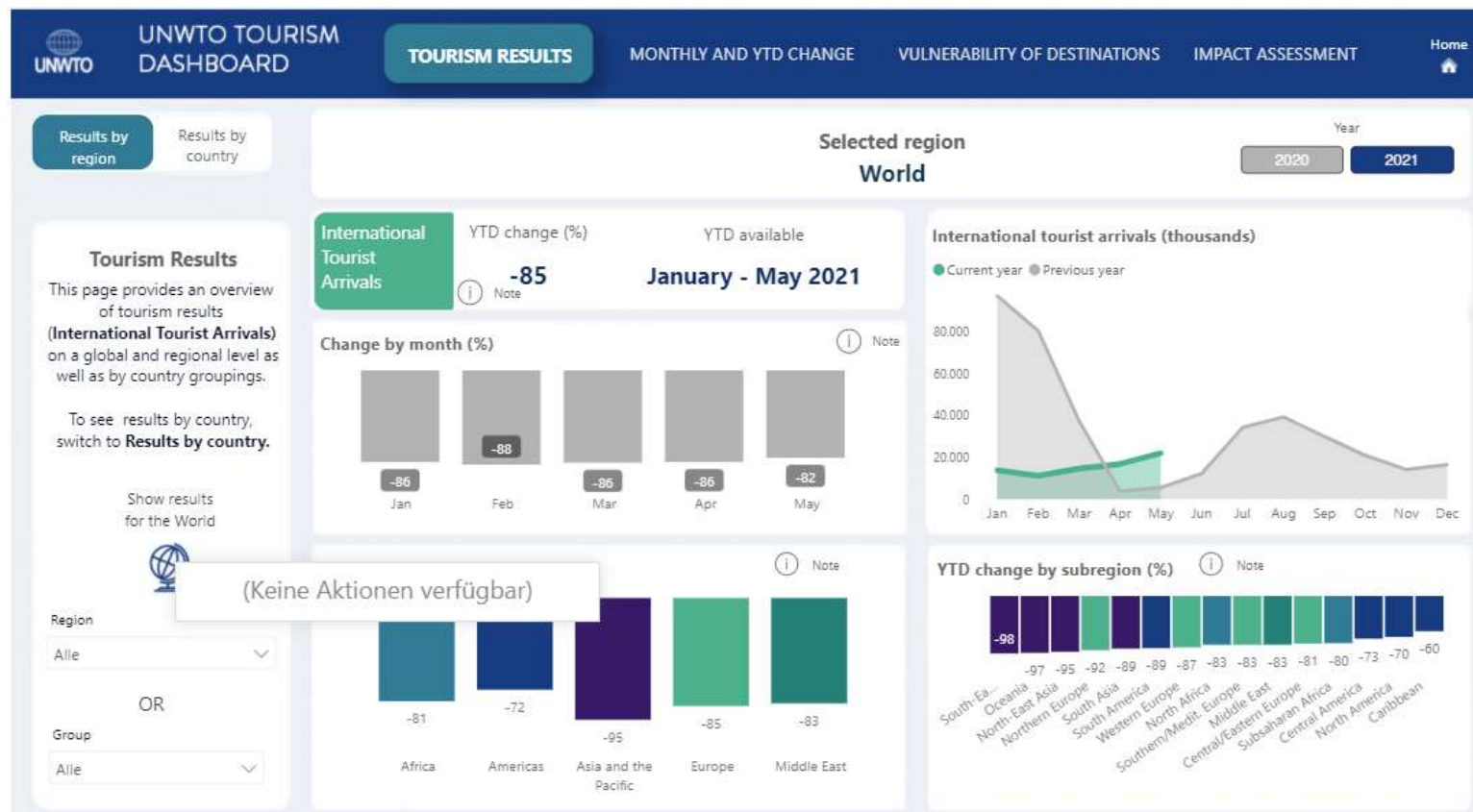
Source: World Health Organization

/// Data may be incomplete for the most recent month.





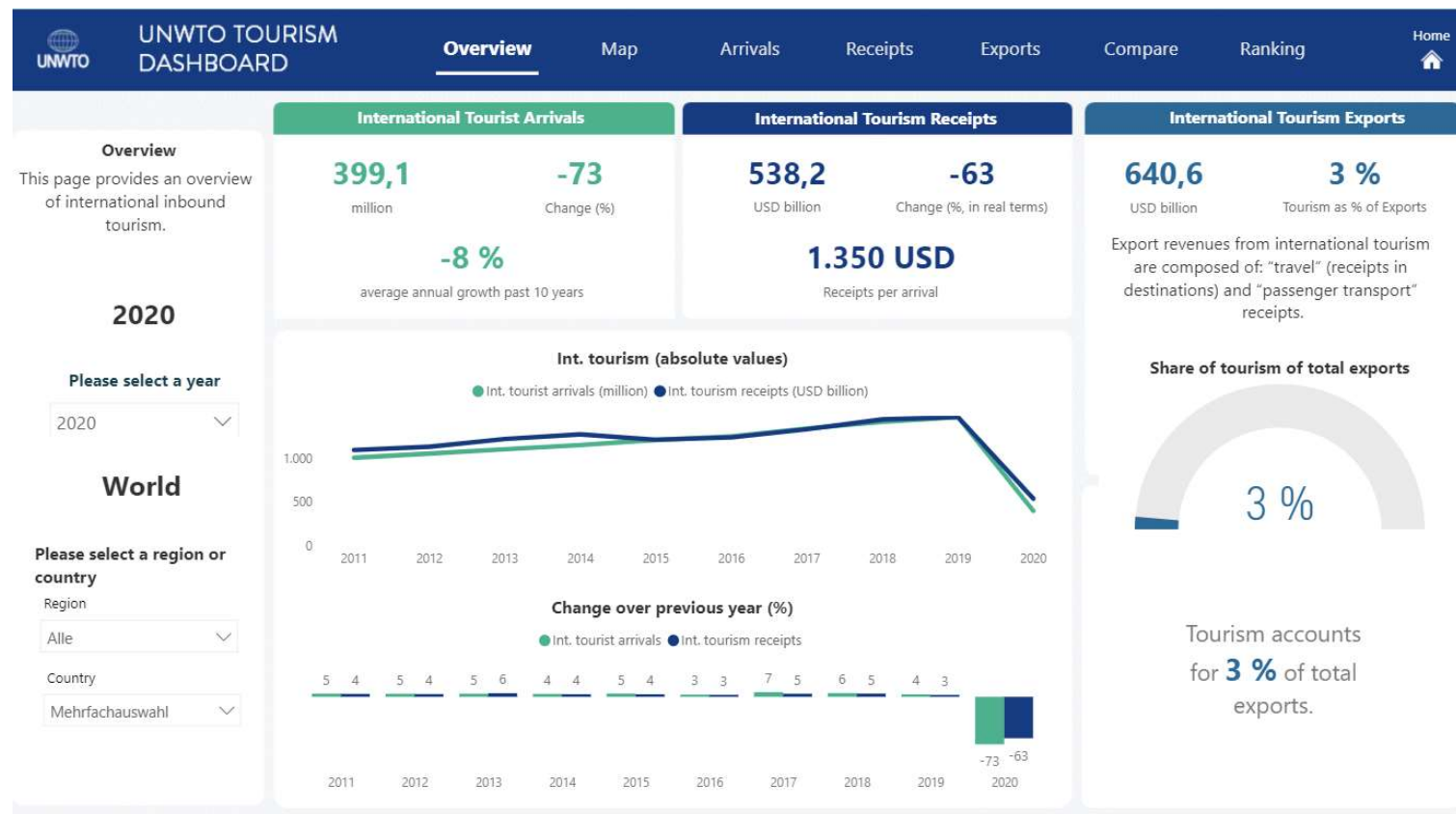
## Impact COVID-19: Tourism



Source: UNWTO Tourist Dash board May 2022.



## Impact COVID-19: Tourism



Source: UNWTO Tourist Dash board May 2022.



# Impact COVID-19 on Tourism: Europe

## Int. Tourist Arrivals - UNWTO

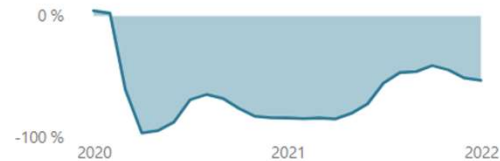
Januar 2022

-53 %

Latest data

-53 %

YTD



-

November 2021

7 %

Latest data

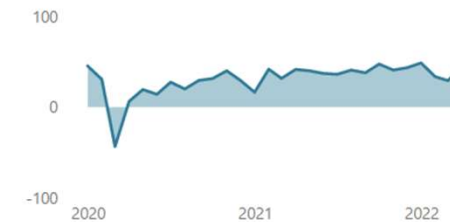


## Travel Sentiment - TCI RESEARCH

April 2022

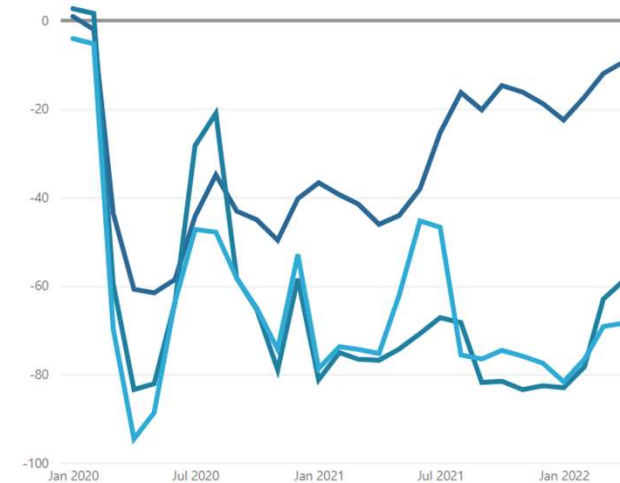
45

Latest data



## YoY Change by indicator (%)

Indicator ● Occupancy Rates ● Hotel Searches ● Hotel Bookings



## Indicator

▲

Int. Tourist Arrivals

YTD (%)

Latest monthly data (%) Data available

Seat capacity - domestic

-67

-67

Jan 2022

Seat capacity - International

-17

-17

Jan 2022

Actual Air Reservations

-49

-49

Jan 2022

Occupancy Rates

-70

-63

Apr 2022

Hotel Searches

58

58

Apr 2022

Hotel Bookings

-48

-40

Apr 2022

Short-term rentals

-69

-67

Apr 2022

Travel Search - Flights

22

17

Apr 2022

Travel Search - Accommodation

80

33

Apr 2022

Travel Sentiment

32

41

Apr 2022

COVID-19 - 14 day notification rate

131

Apr 2022

Source: UNWTO Tourist Dash board May 2022.



## Impact COVID-19 on Tourism: Europe

**Hotel Searches - Sojern**

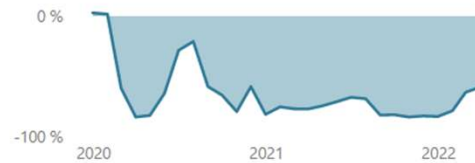
April 2022

-59 %

Latest data

-71 %

YTD



**Hotel Bookings - Sojern**

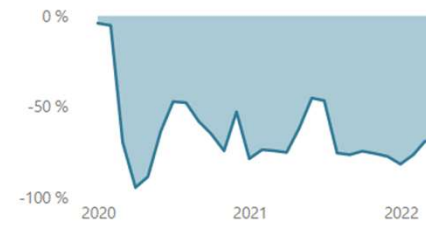
April 2022

-68 %

Latest data

-74 %

YTD

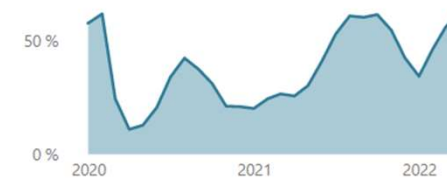


**Occupancy Rates - STR**

April 2022

63 %

Latest data



**Short-term rentals - AirDNA**

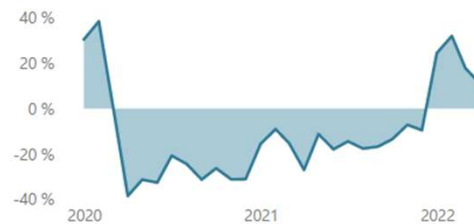
April 2022

11 %

Latest data

20 %

YTD



**Travel Search - Accommodation - Google**

(Leer)

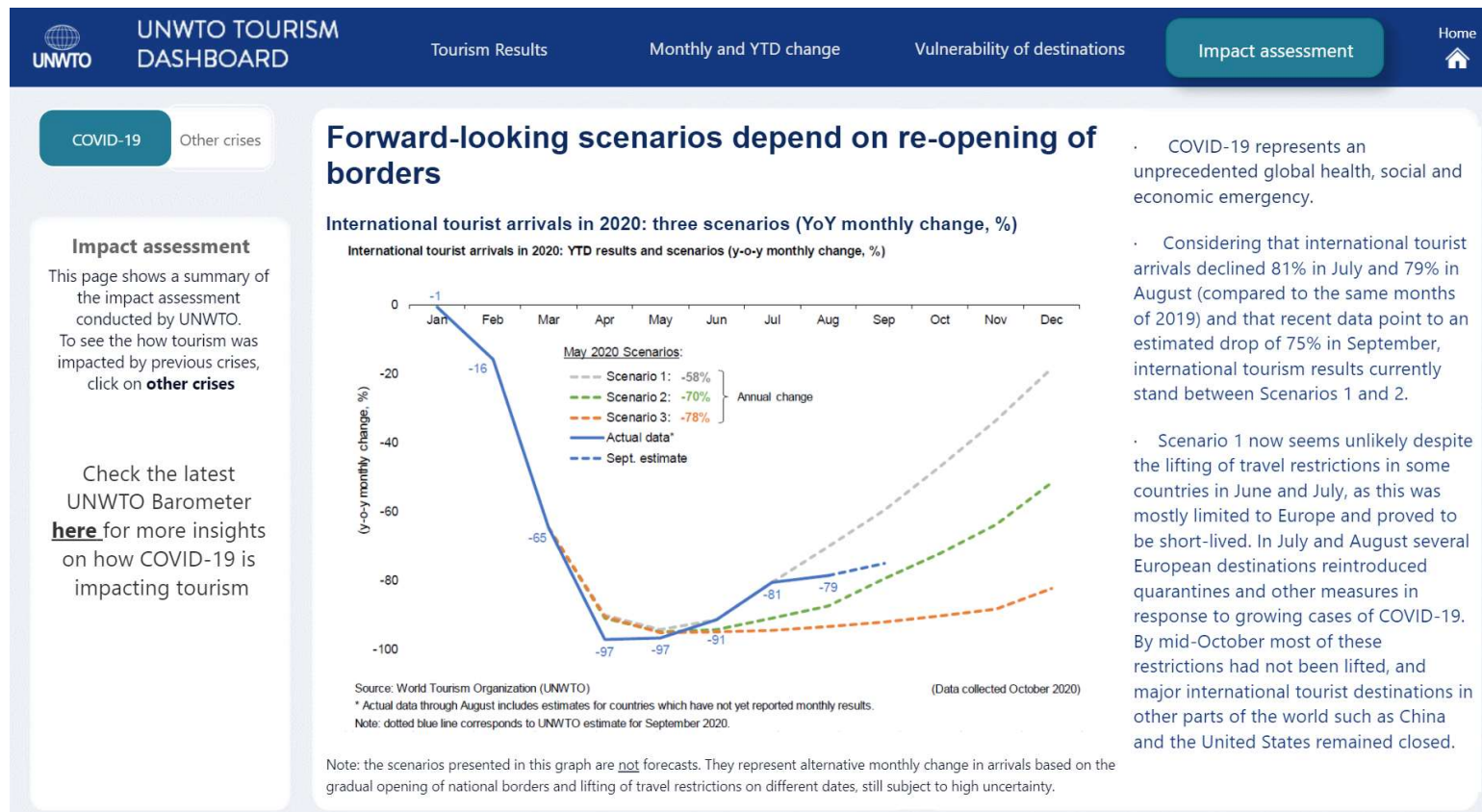
(Leer)

Latest data



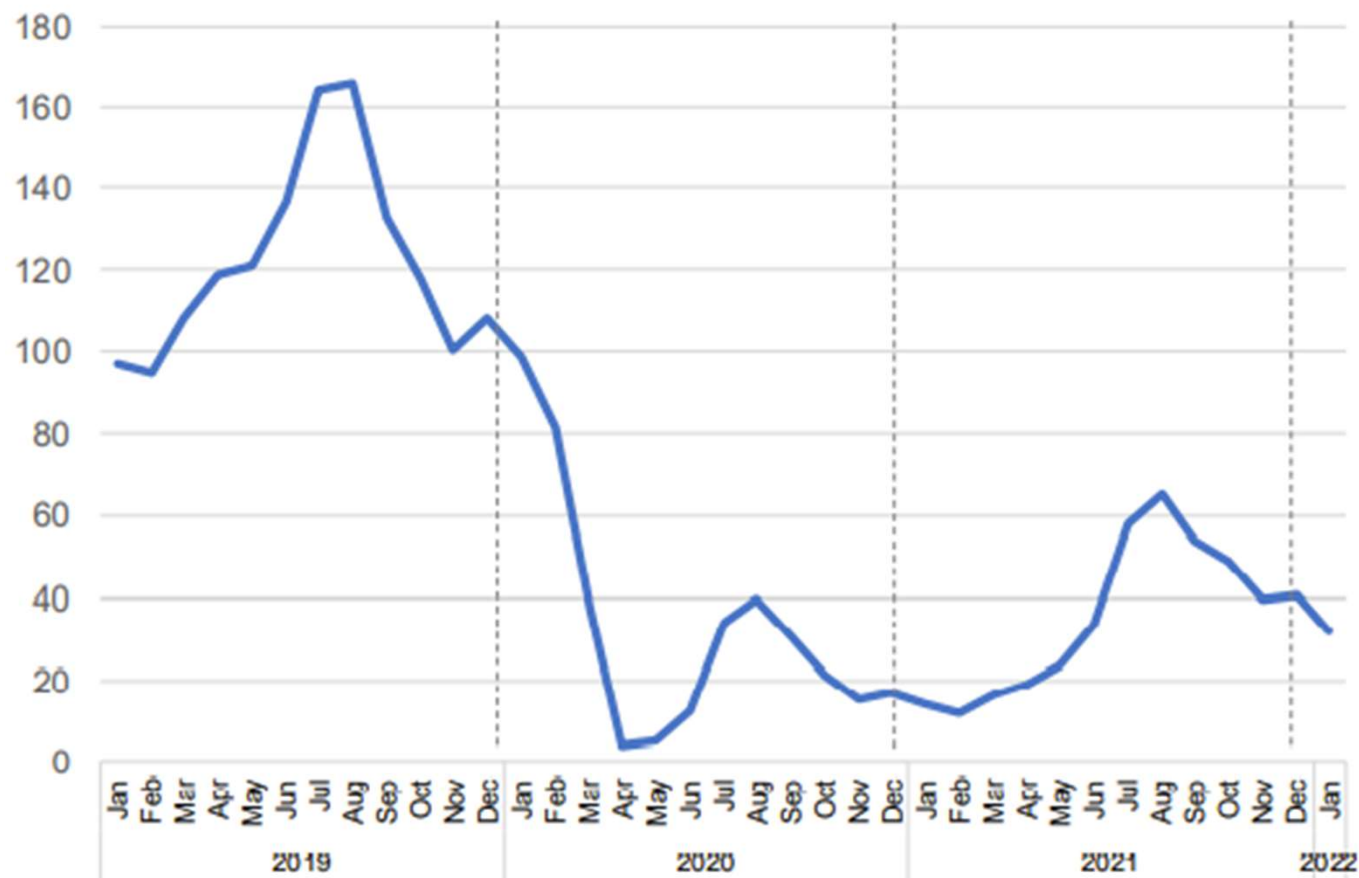


# Impact COVID-19 on Tourism: preliminary forecast





## International tourist arrivals by month, Jan 2019-Jan 2022 (millions)

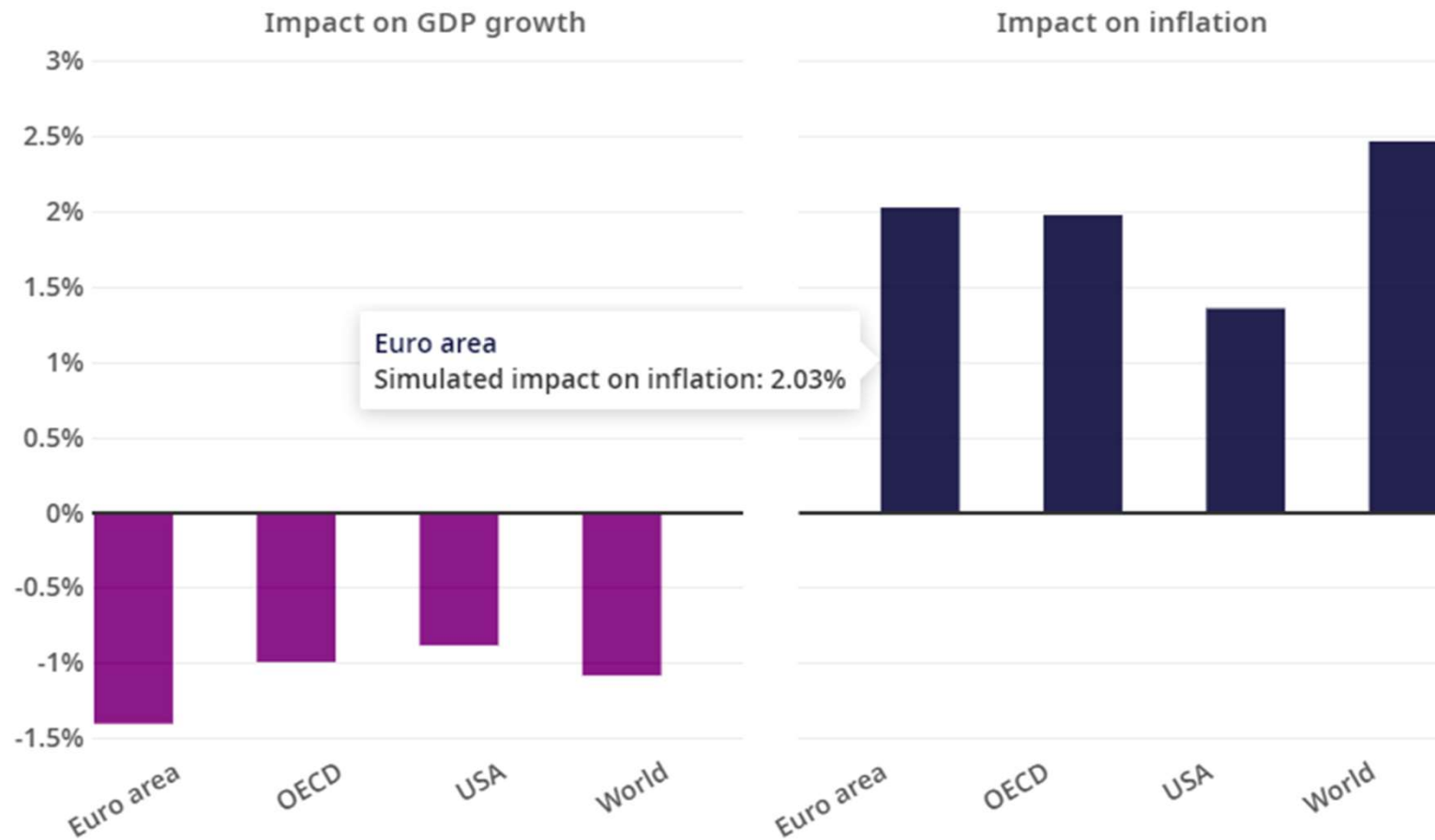


Source: UNWTO

(Data as of March 2022)



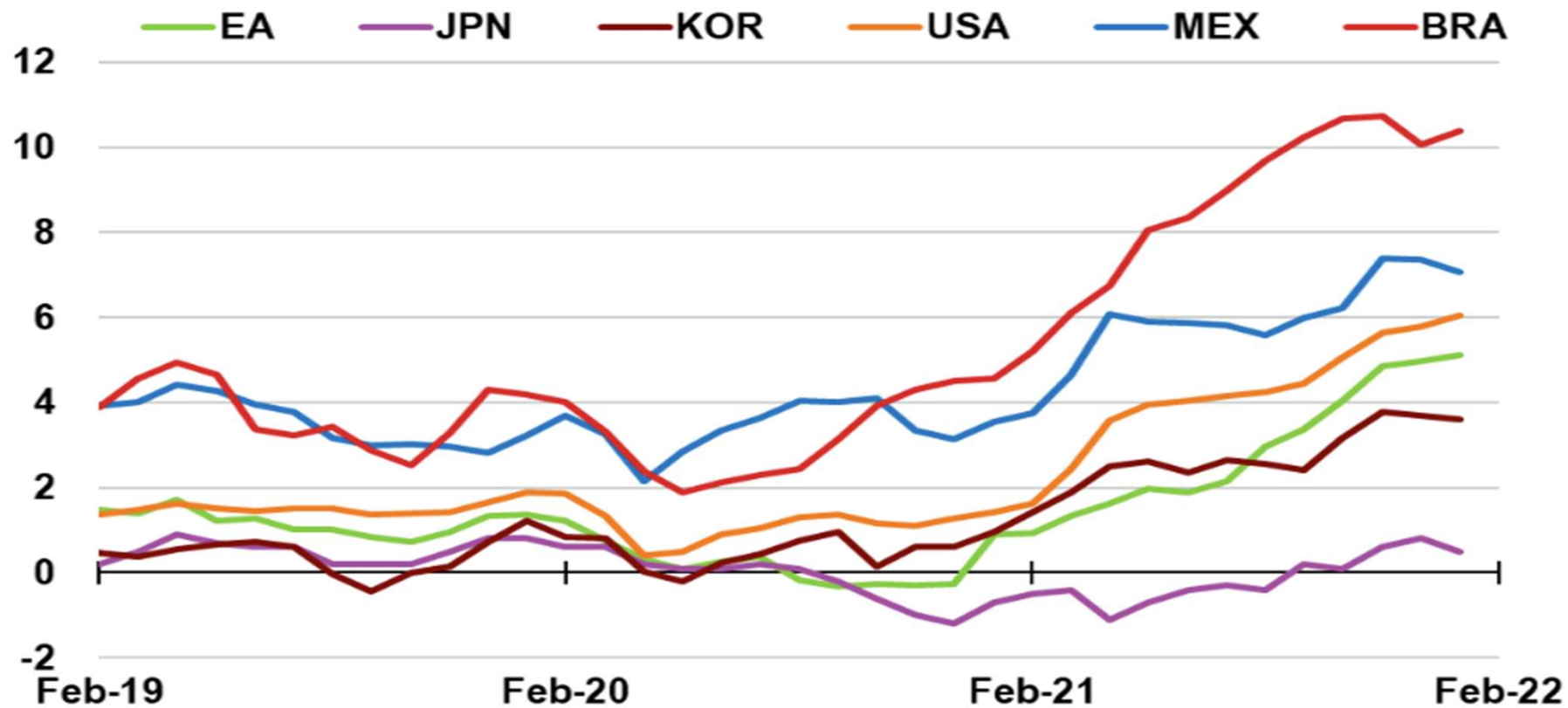
## Simulated impact on economic growth and inflation of the Ukrainian war



Source: [OECD Economic Outlook, Interim Report March 2022](#).



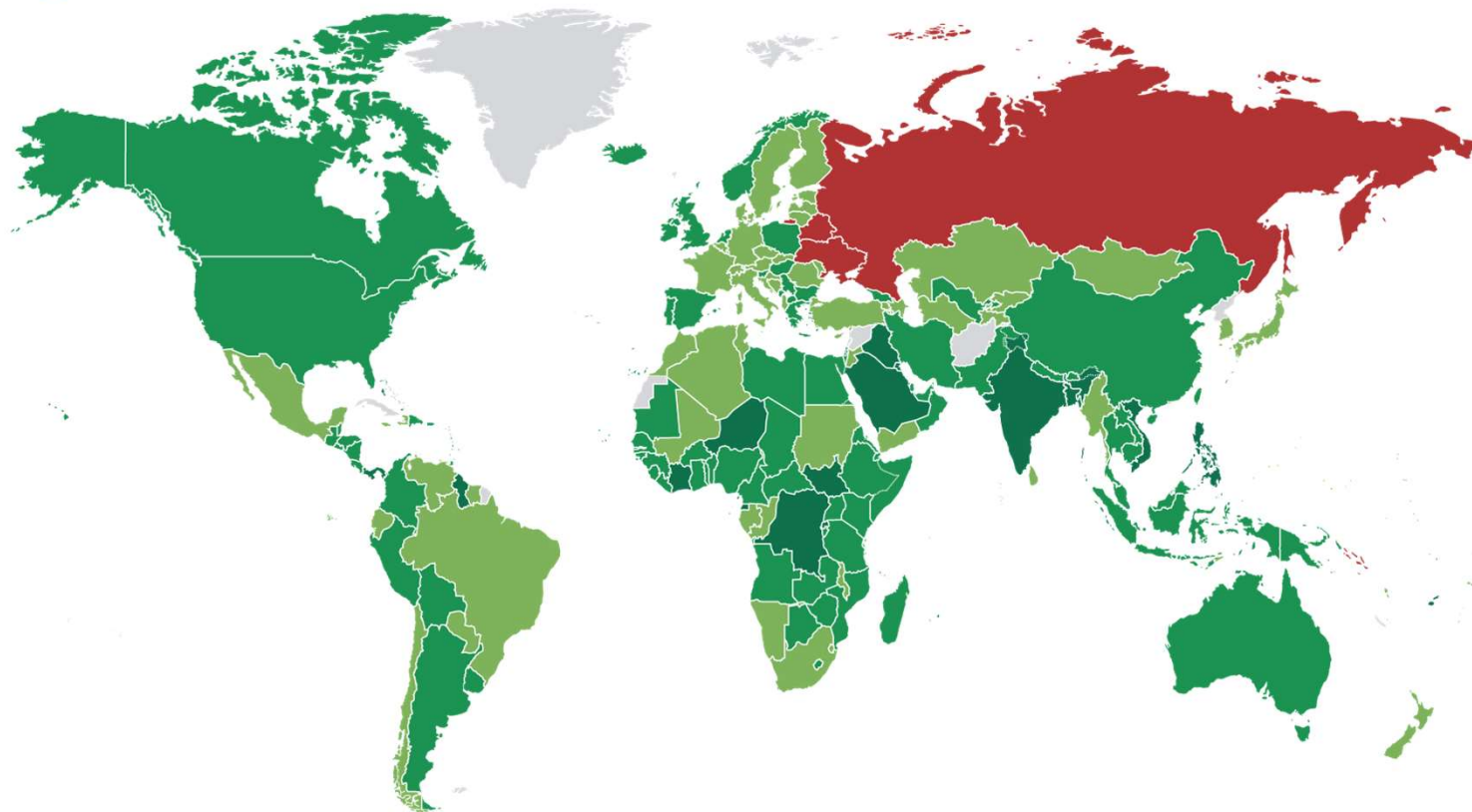
## Annual inflation%



Source: OECD Main Economic Indicators database

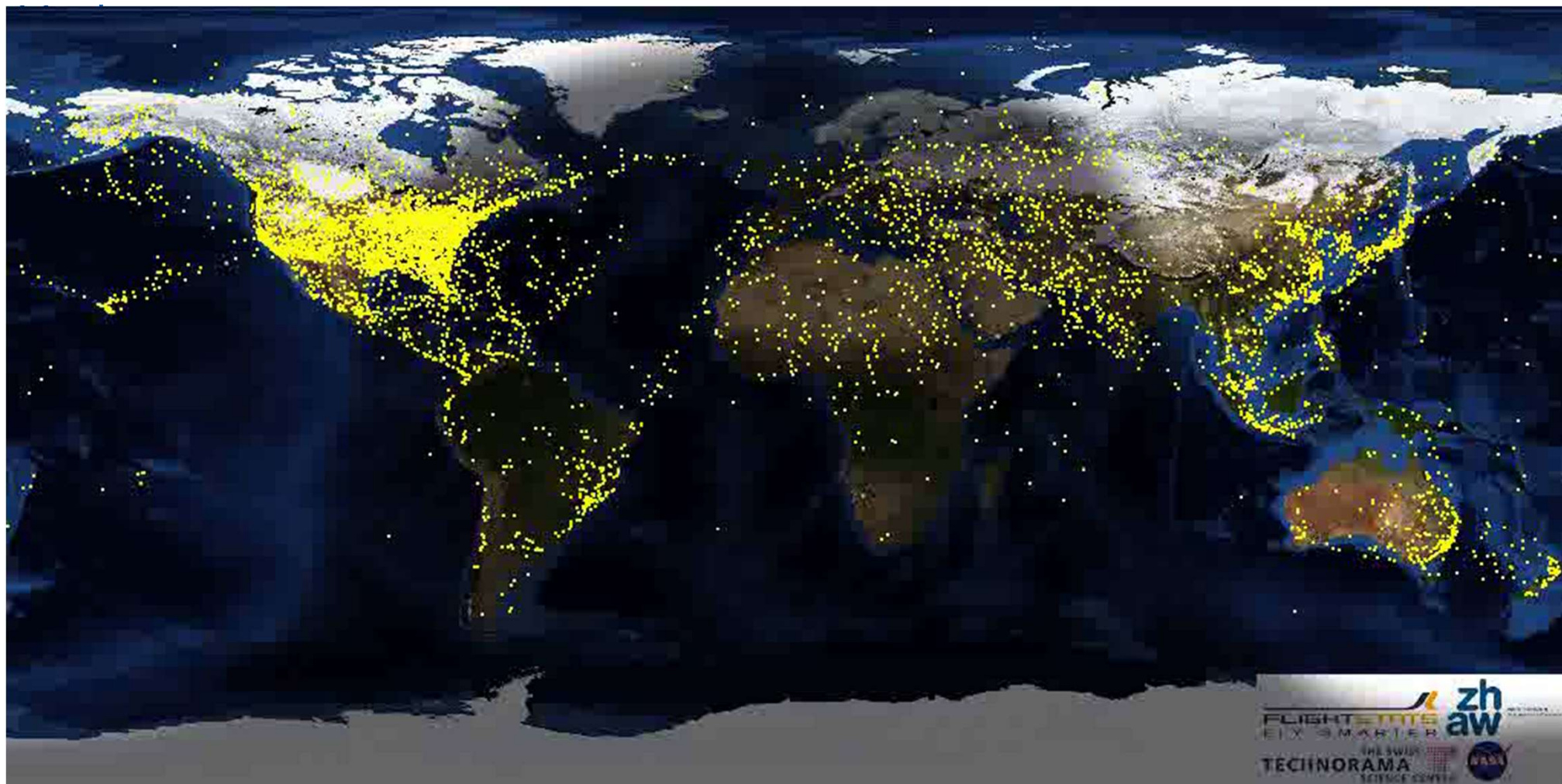


## Real GDP growth



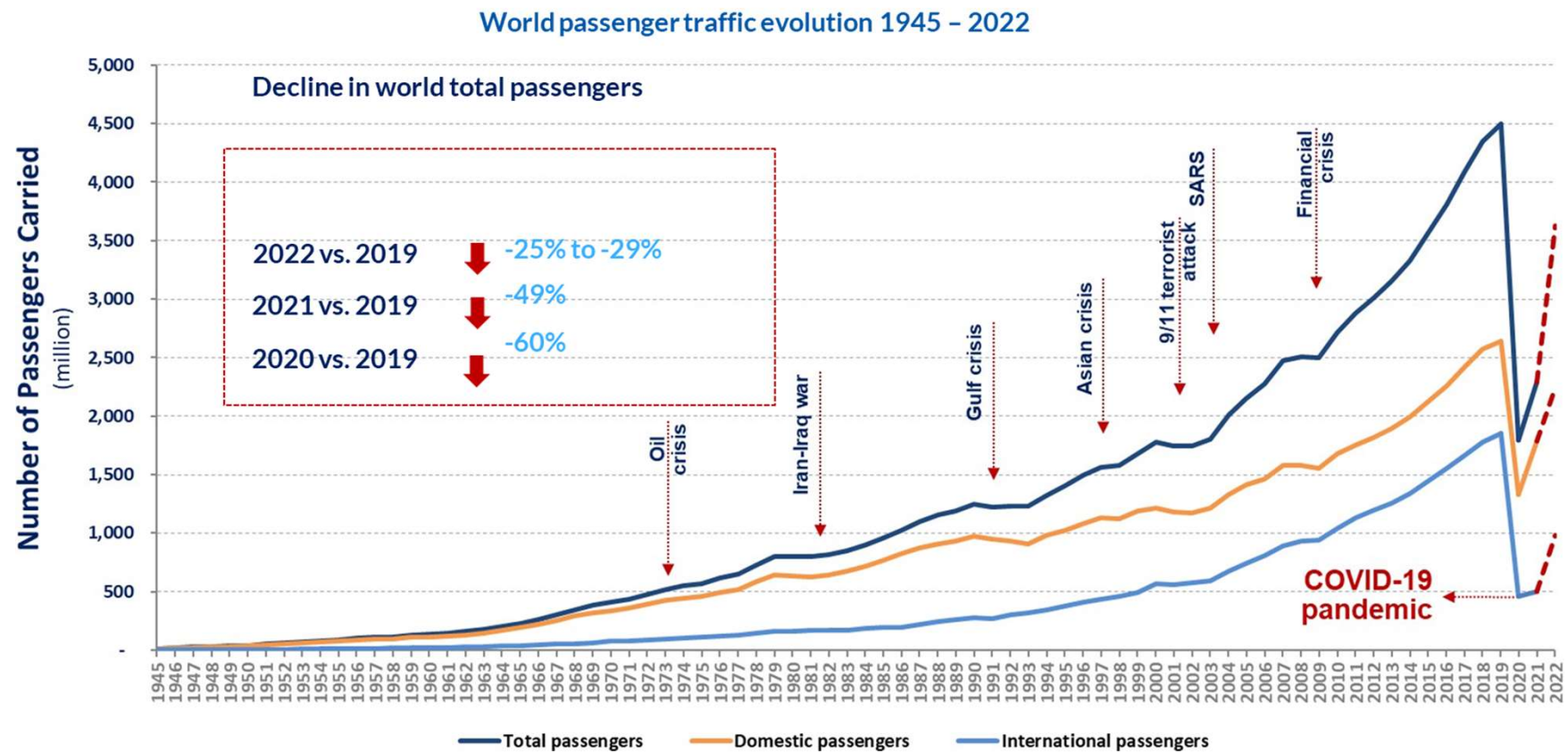
● 6% or more ● 3% - 6% ● 0% - 3% ● -3% - 0 ● less than -3% ● no data

Source: [World Economic Outlook, October 2021: Recovery During A Pandemic \(imf.org\)](https://www.imf.org/publications/WorldEconomicOutlook/2021/October)





## World passenger traffic collapses with unprecedented decline in history



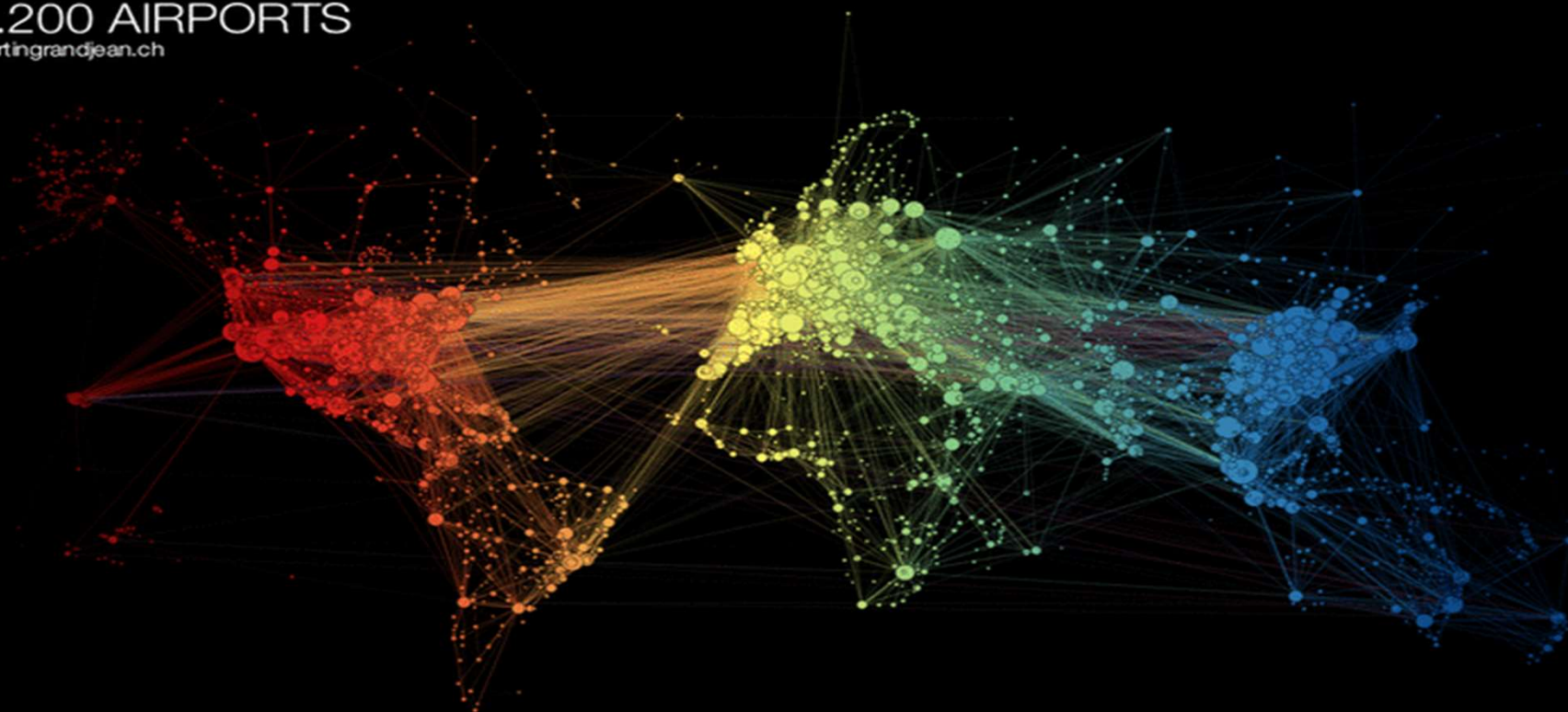
Source: Effects of Novel Coronavirus (COVID-19) on Civil Aviation: Economic Impact Analysis. ICAO May 2022



# CONNECTIONS

3.200 AIRPORTS

[martingrandjean.ch](http://martingrandjean.ch)





## Year 2020/2021 results: World total passenger traffic

The COVID-19 impact on world scheduled passenger traffic for year 2020 (actual results), compared to 2019 levels:

- Overall reduction of 50% of seats offered by airlines
- Overall reduction of 2,703 million passengers (-60%)
- Approx. USD 372 billion loss of gross passenger operating revenues of airlines

**2020**

**2021**

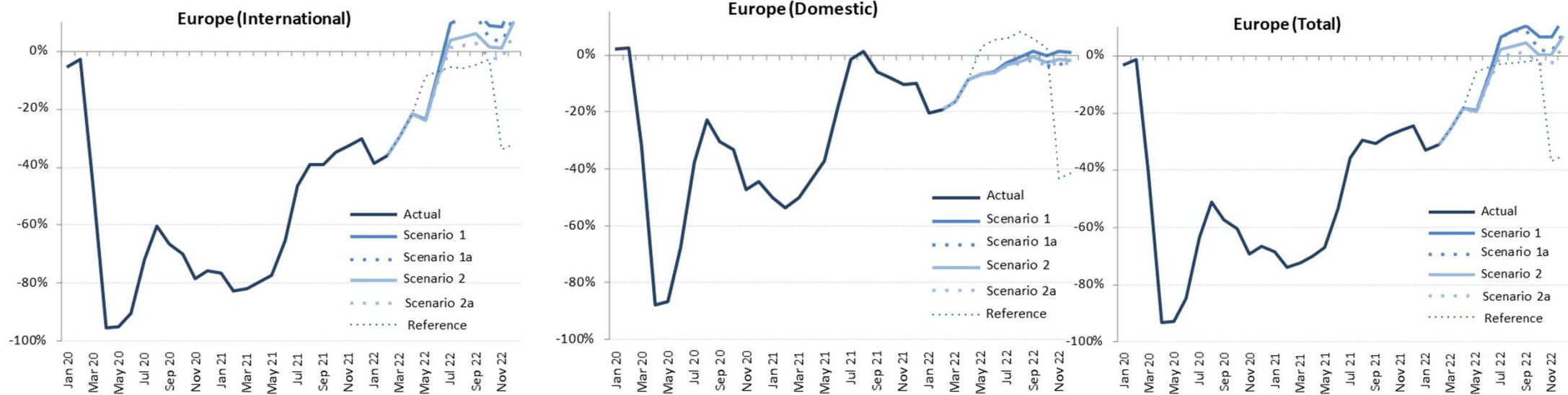
The COVID-19 impact on world scheduled passenger traffic for year 2021 (preliminary estimates), compared to 2019 levels:

- Overall reduction of 40% of seats offered by airlines
- Overall reduction of 2,201 million passengers (-49%)
- Approx. USD 324 billion loss of gross passenger operating revenues of airlines

**Source:** Effects of Novel Coronavirus (COVID-19) on Civil Aviation: Economic Impact Analysis. ICAO May 2022



## Seat capacity

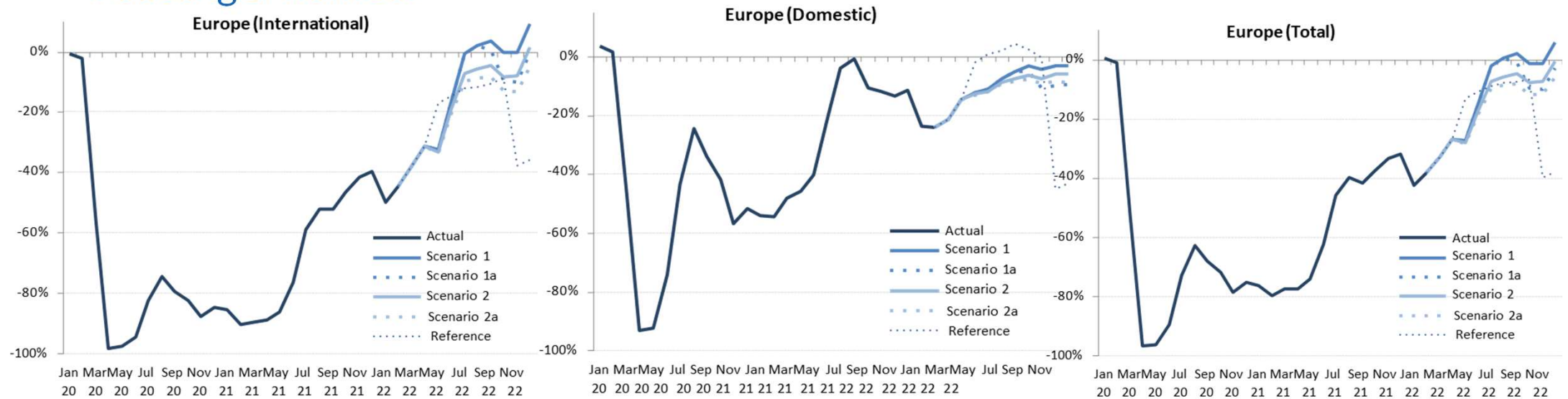


Source: ICAO estimates. Effects of Novel Coronavirus (COVID-19) on Civil Aviation: Economic Impact Analysis. ICAO May 2022





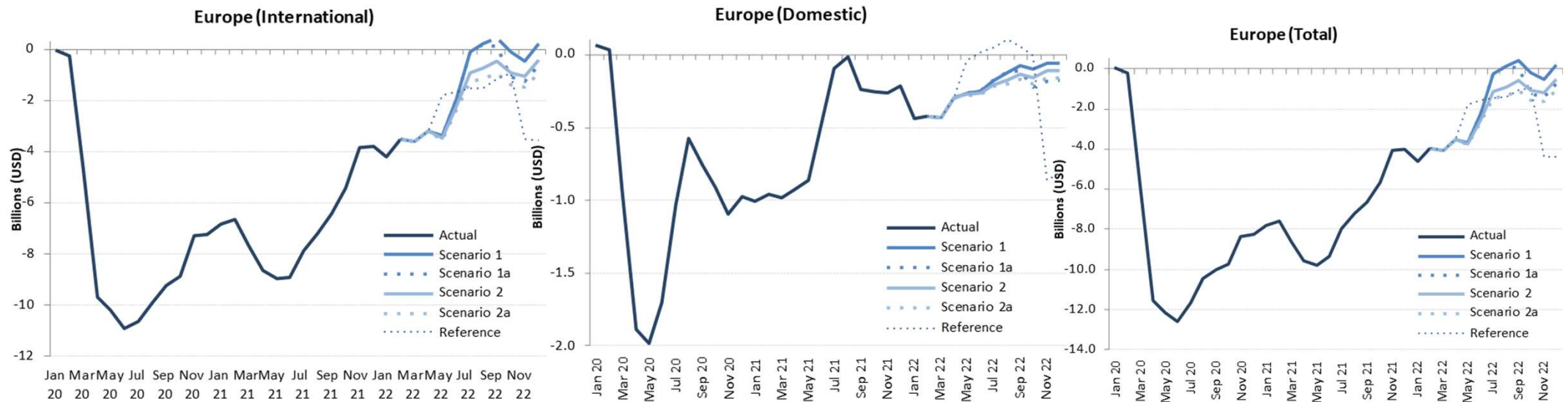
## Passenger number



Source: ICAO estimates. Effects of Novel Coronavirus (COVID-19) on Civil Aviation: Economic Impact  
Analysis. ICAO May 2022

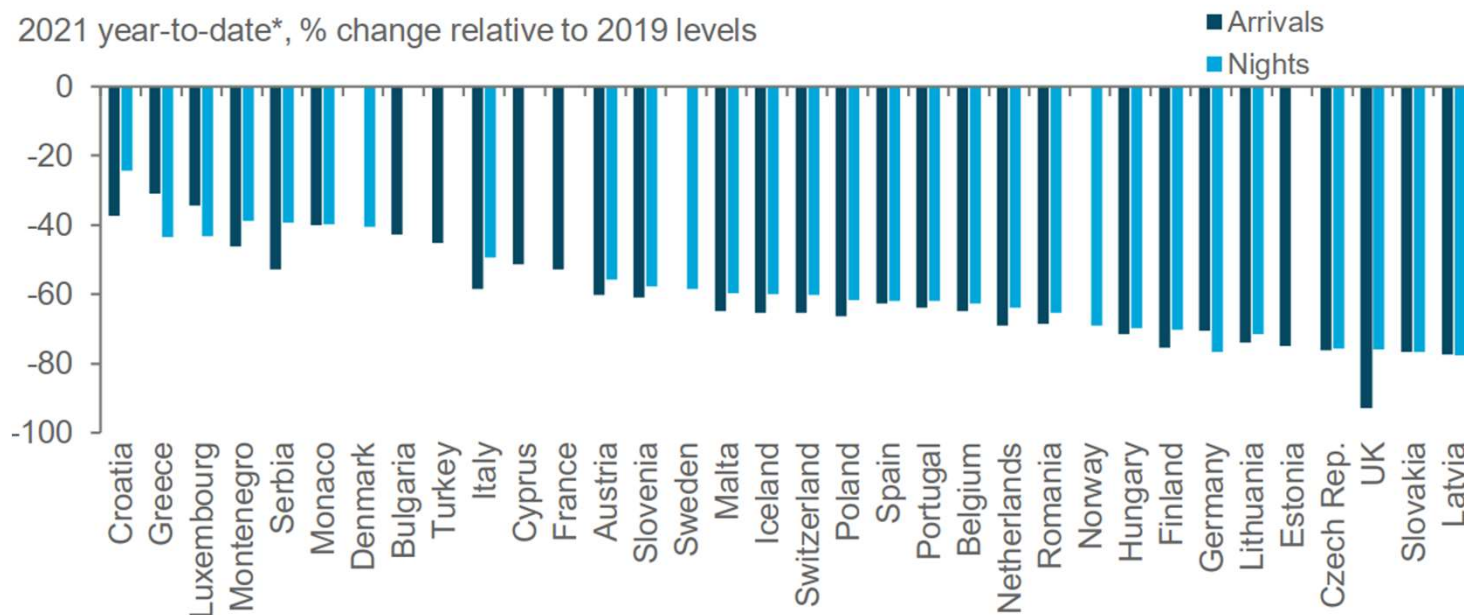


## Passenger revenue



Source: ICAO estimates. Effects of Novel Coronavirus (COVID-19) on Civil Aviation: Economic Impact Analysis. ICAO May 2022

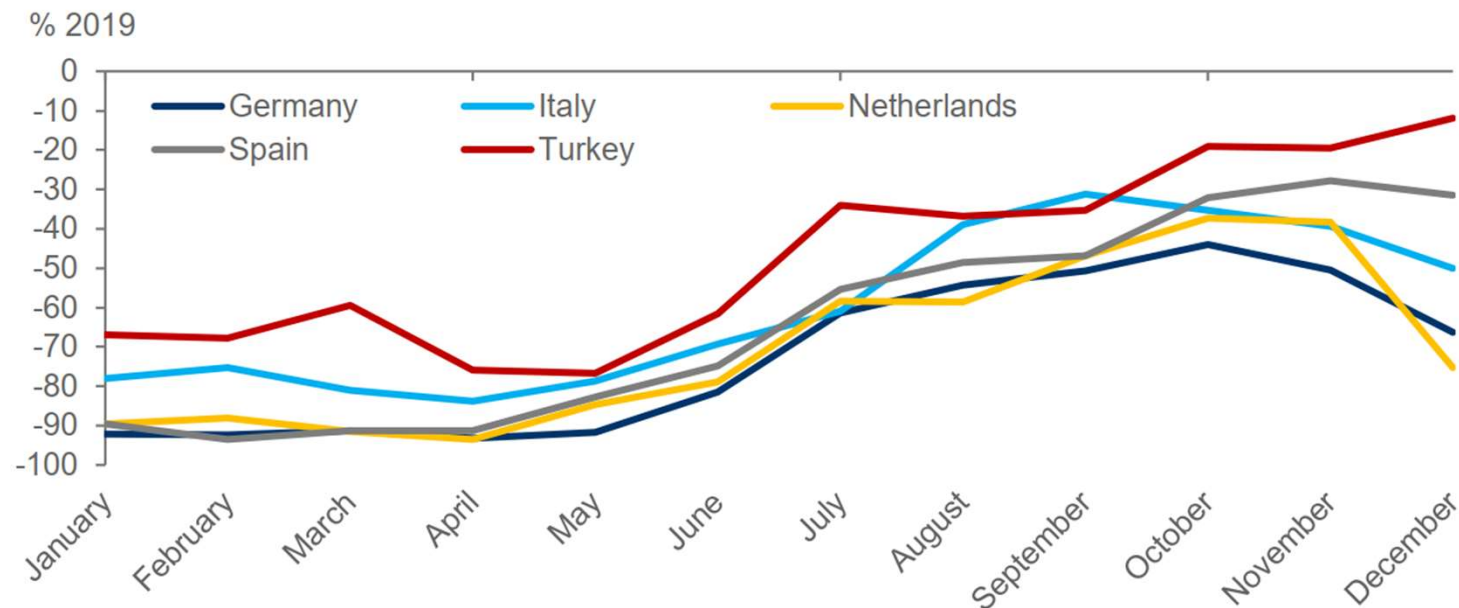
## Foreign Visits and Overnights to Select Destinations



Source: European Tourism – Trends & Prospects (Q1/2022) European Travel Commission. May 2022



## Evolution of Arrivals Recovery for Select Destinations, 2021 vs. 2019



Source: European Tourism – Trends & Prospects (Q1/2022) European Travel Commission. May 2022





## WTTC Recommendations

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Implement standardized global health and safety protocols

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COVID-19 testing before departure and contact tracing tools

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Digital technologies that enable seamless travel

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Offer flexibility for bookings or changes

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Offer promotions to incentivize domestic and international travel

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Promotion of destinations

---

Adapt business models

---

Reinforce the provision and purchase of travel insurance

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Provide consistent and coordinated communication to travelers

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Develop capacity building and training programs to upskill and retrain tourism workers

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Reinforce sustainability practices

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Continue to invest in crisis preparedness and resilience

Source: "100 Million Jobs Recovery Plan Final Proposal", World Travel & Tourism Council (WTTC) [www.wttc.org](http://www.wttc.org)  
G20 2020 Saudi Arabia



CZECH TECHNICAL UNIVERSITY IN  
MASARYK INSTITUTE OF ADVANCED

## Instagram



visit.dresden

Seguir



1,438 publicaciones

54.6k seguidores

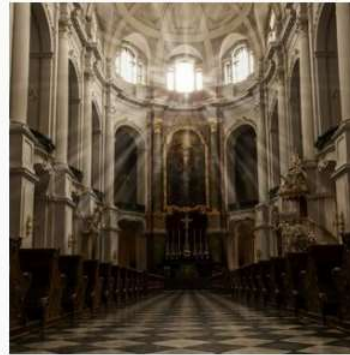
457 seguidos

Visit Dresden

♥ Official channel of a region between baroque and urban lifestyle | Dresden Marketing Board

♥ You're planning your next city-trip? 📌

[www.visit-dresden.travel](http://www.visit-dresden.travel)

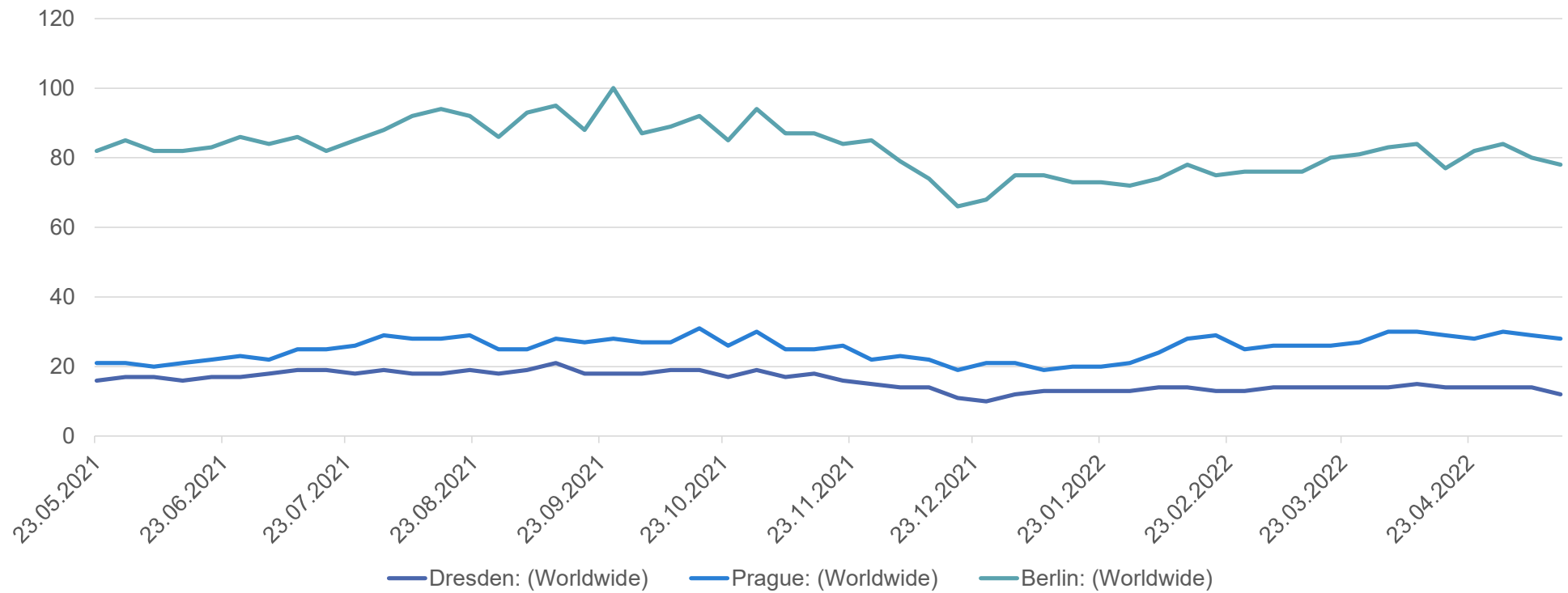


FHD Fachhochschule  
Dresden

FAKULTÄT  
BETRIEBSWIRTSCHAFT

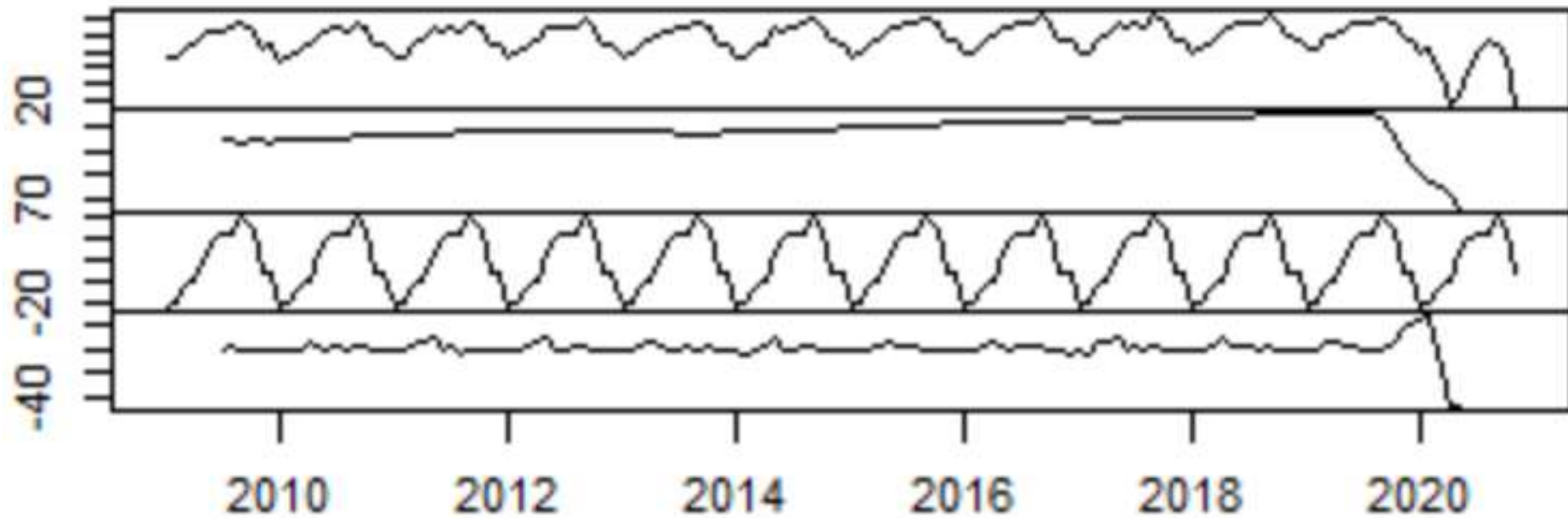


## Google Trends: Search





## Overnight stays abroad guests: Dresden







## Drivers of change

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Geopolitics

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Data

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Africa and Asia-Pacific

---

Government

---

Security and borders

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Data protection and trust

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Business

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Economy

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Values and Communities

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Environment

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Technology

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## Some tourism trends

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Virtual and Augmented Reality in Holiday Planning

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Shared Experiences

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Staycation

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Authentic local experiences

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Bleisure

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Integrated holiday planning

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Slow Travel

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Holiday short trips

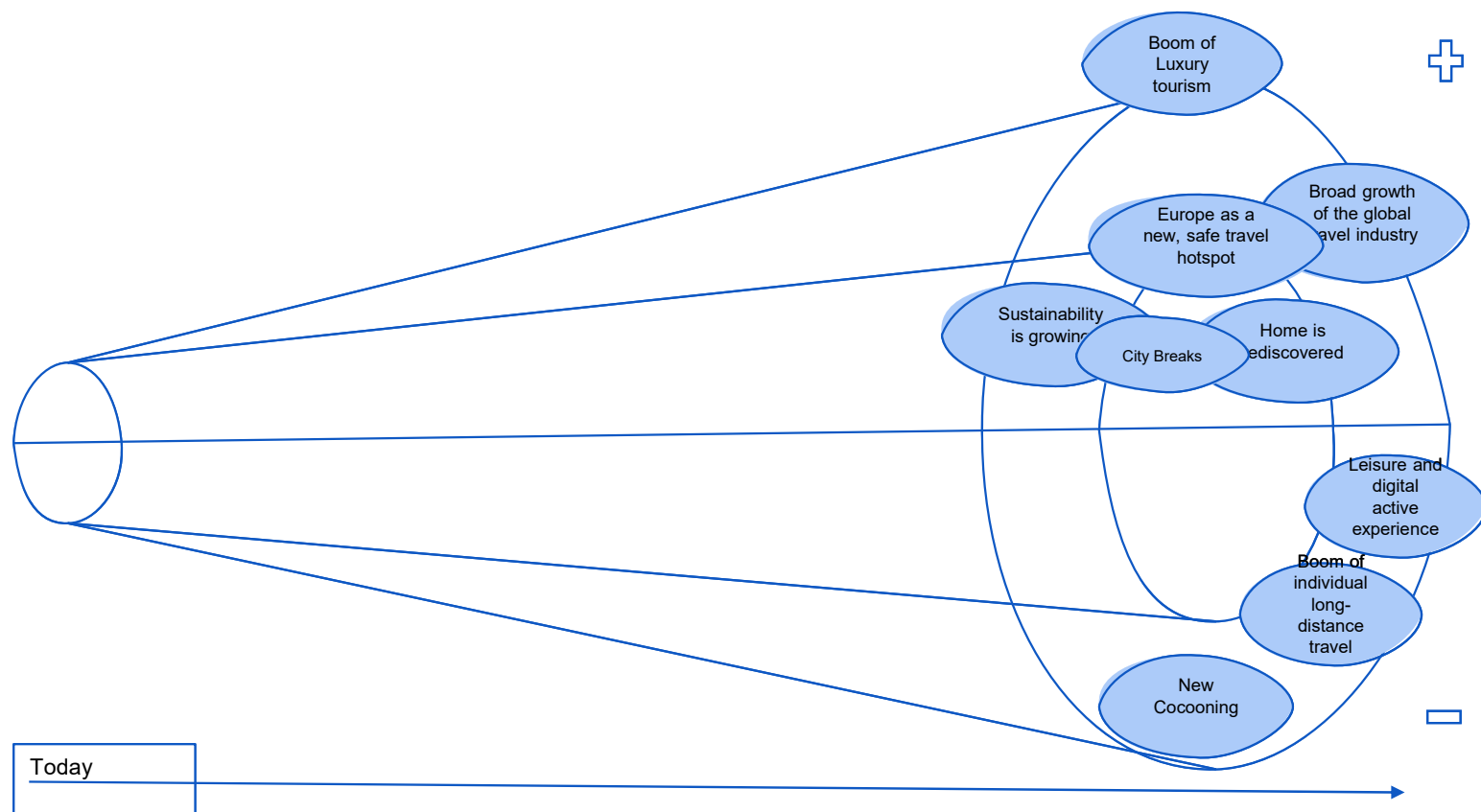
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Personalization and exclusivity

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## Scenario Analysis: Europe





## Results



Tourism recovery will be uneven



Product customization



Slow consolidation of major tourist players: airlines and hotels



Agile entrepreneurship



Public incentives to business: financial, non-financial and legislative





# Děkuji mnohokrát

Thank you very much!

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