

# Effects of COVID-19 on European tourism

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# Overview

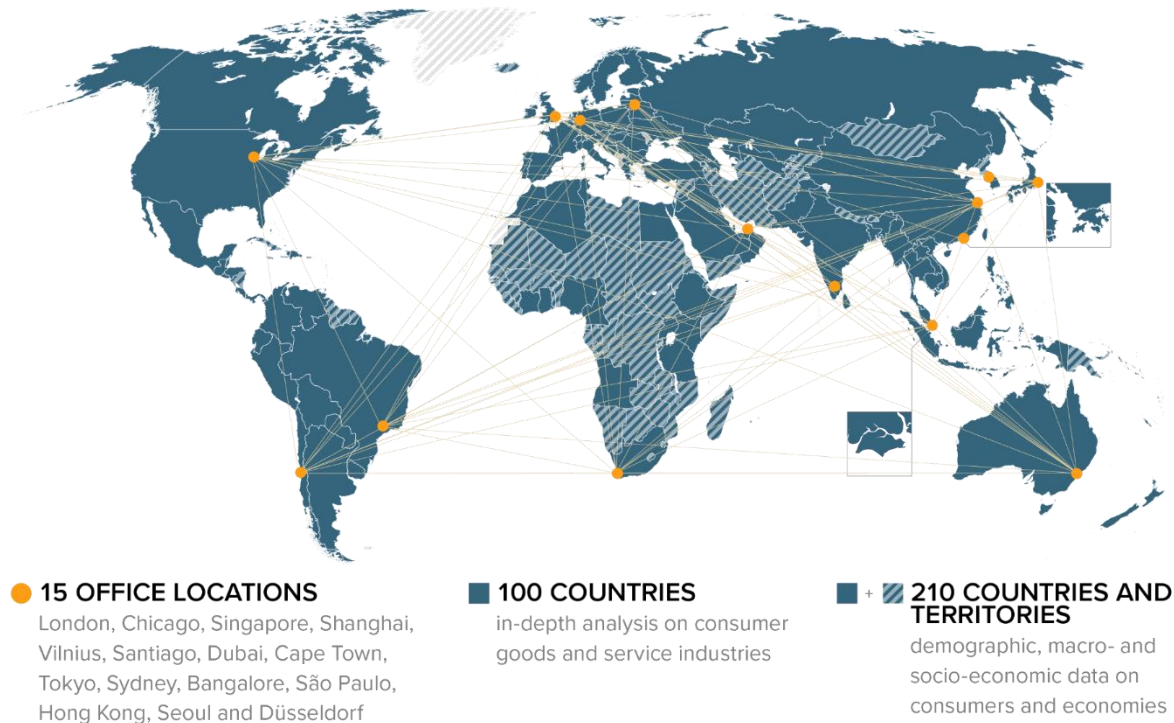
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Latest travel outlook

Changing consumer values

Sustainable transformation

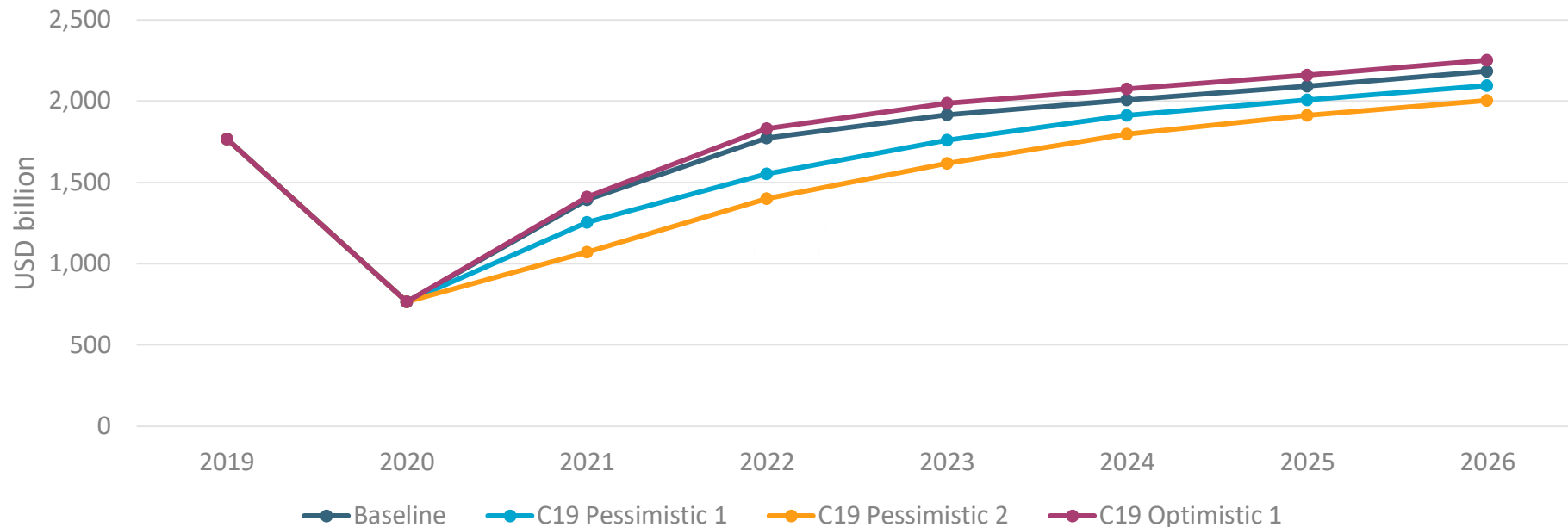
# Euromonitor International network and coverage



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# Latest travel outlook

## World Inbound Tourism Spending Forecast Scenarios 2019-2026



**-57%**

decline in global  
inbound spending 2020

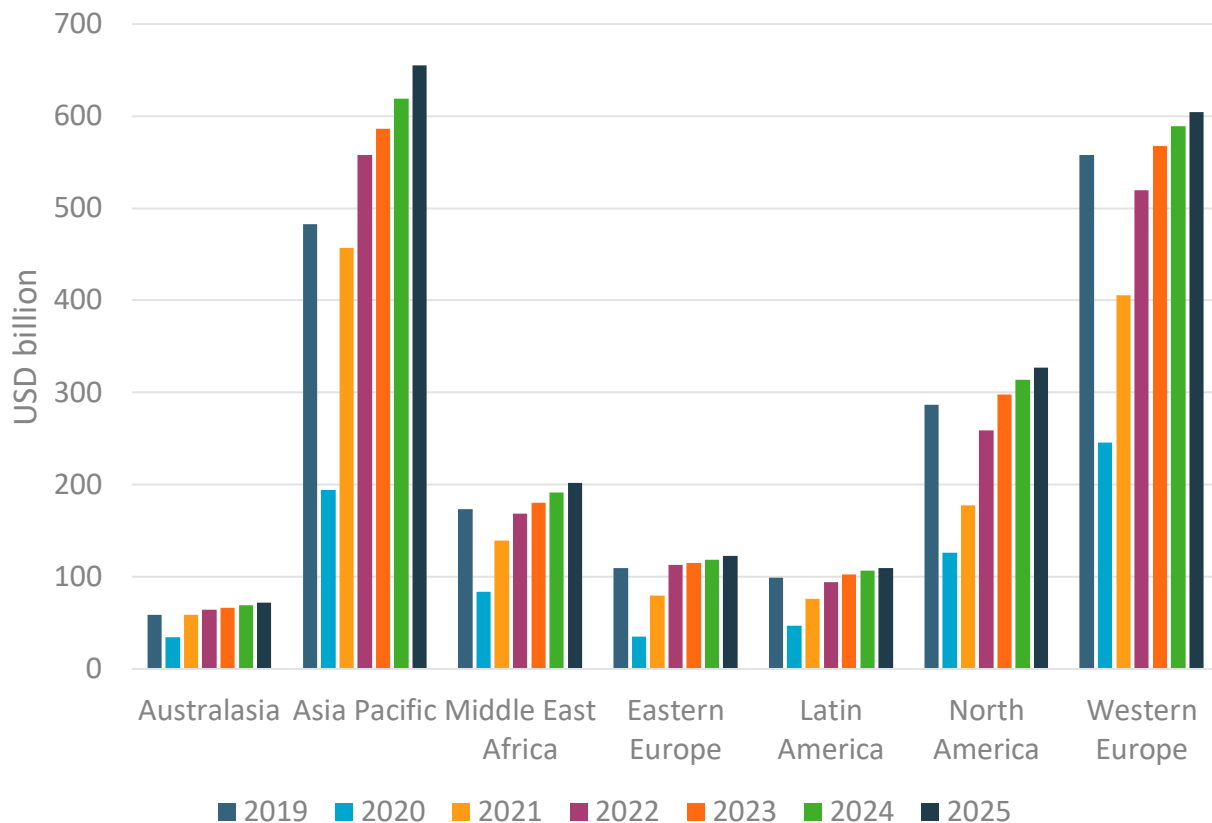
**-20%**

less spending in 2021  
compared to 2019

**3 to 5**

number of years  
best to worst case recovery

## Baseline Inbound Receipts by Region USD billion 2019-2025



**\$1 tn**  
world inbound receipts lost in  
2020

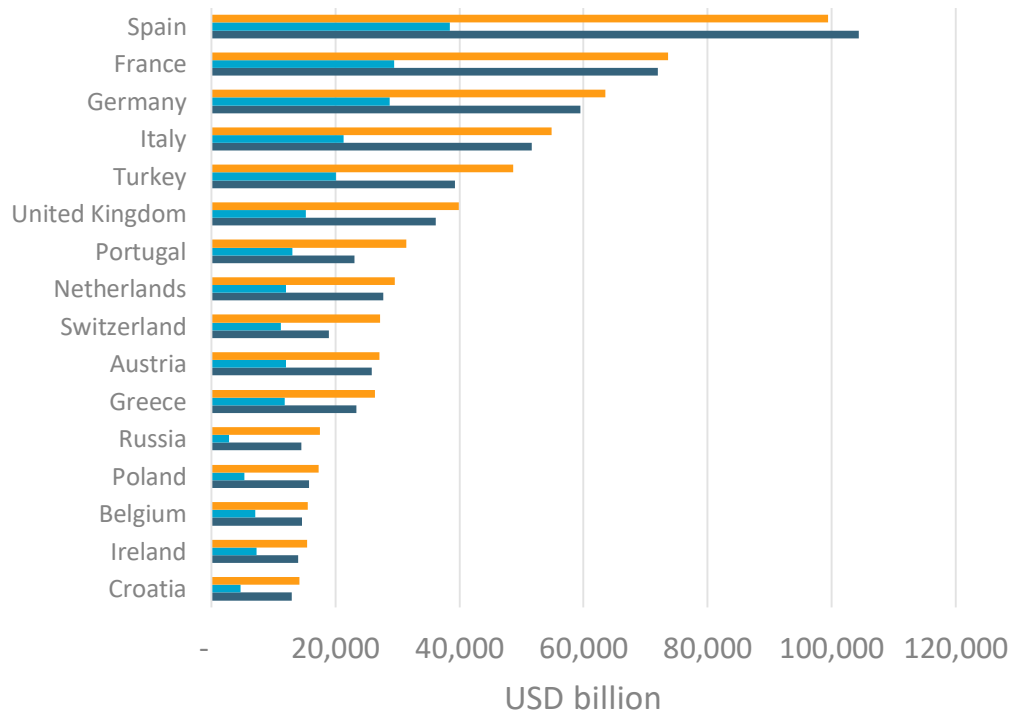
**33%**  
% value share for Asia in 2021,  
overtaking Western Europe

**2023**  
Baseline recovery for Europe

Note: Baseline forecast, 1 March 2021

# Value driven recovery

Inbound Tourism Spending for Top European Destinations 2020/2025



■ 2025 ■ 2020 ■ 2019

Note: Baseline forecast

## Faster rebound

Switzerland, Portugal, Turkey,  
Greece,

## Mid

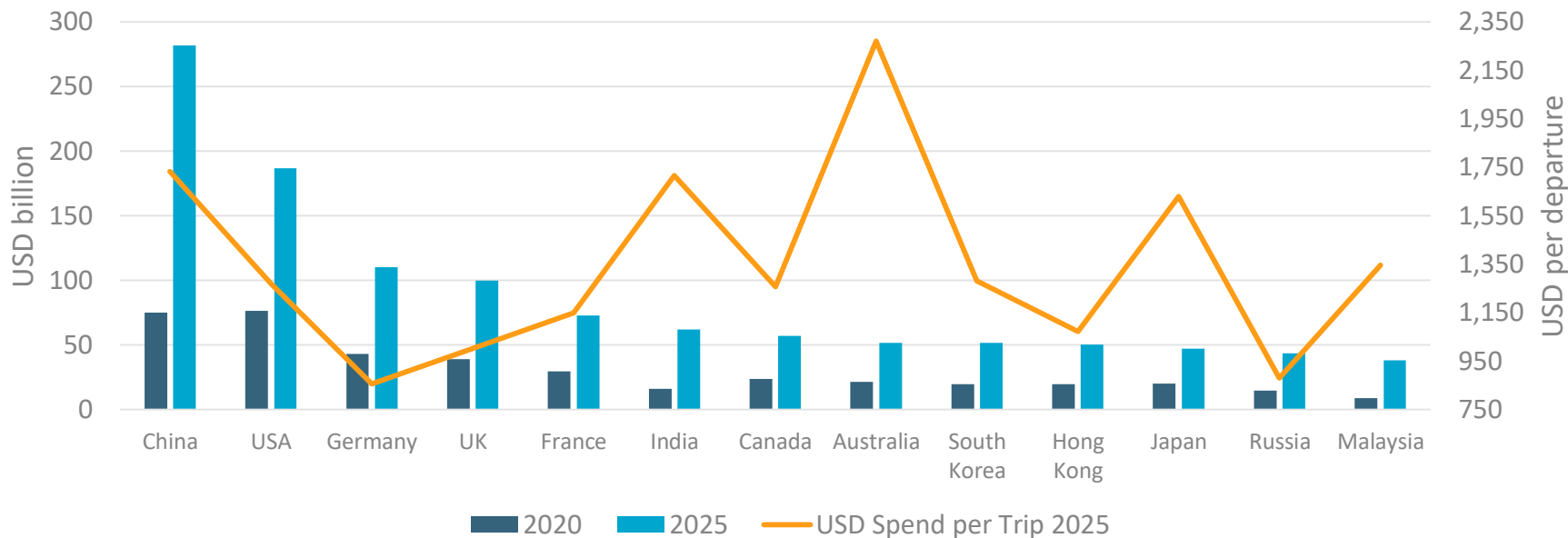
Croatia, Italy, UK

## Slow

Spain, France

## Redefining source market value for greater returns to local communities

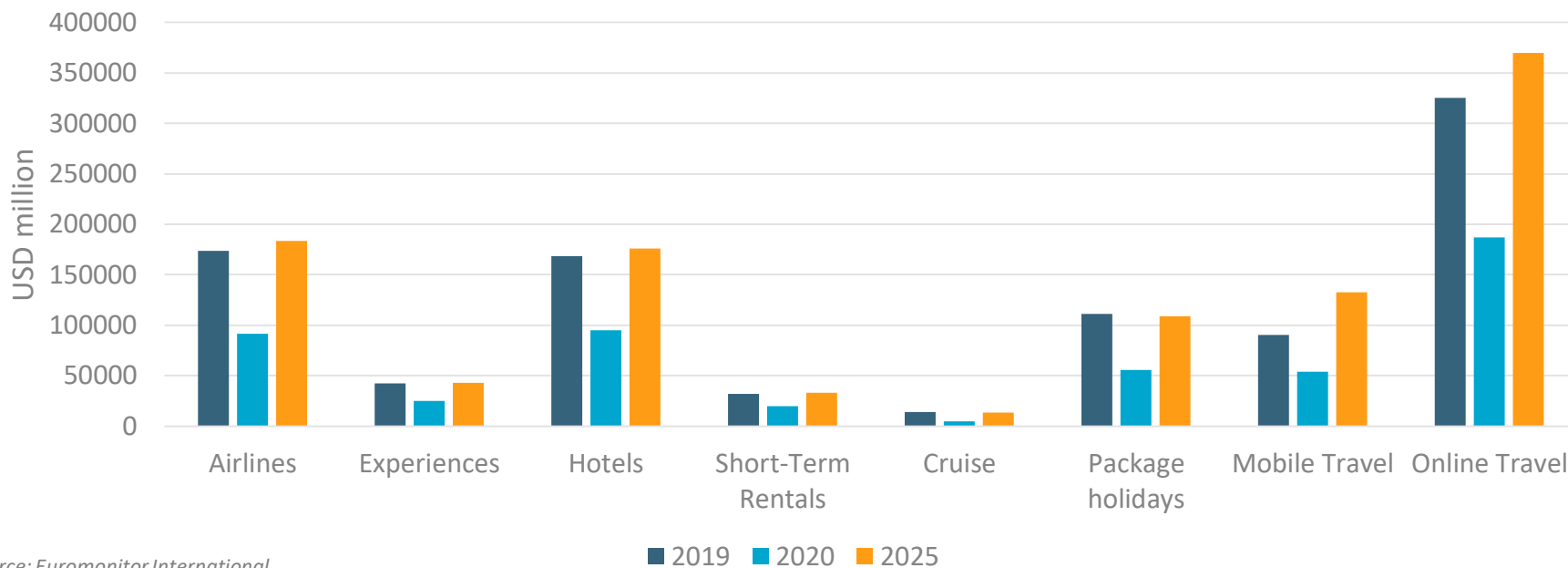
Outbound Tourism Spending by Top Source Markets 2020/2025





## Digitalisation to drive recovery

### European Travel Forecast Sales 2019/2020/2025



Source: Euromonitor International

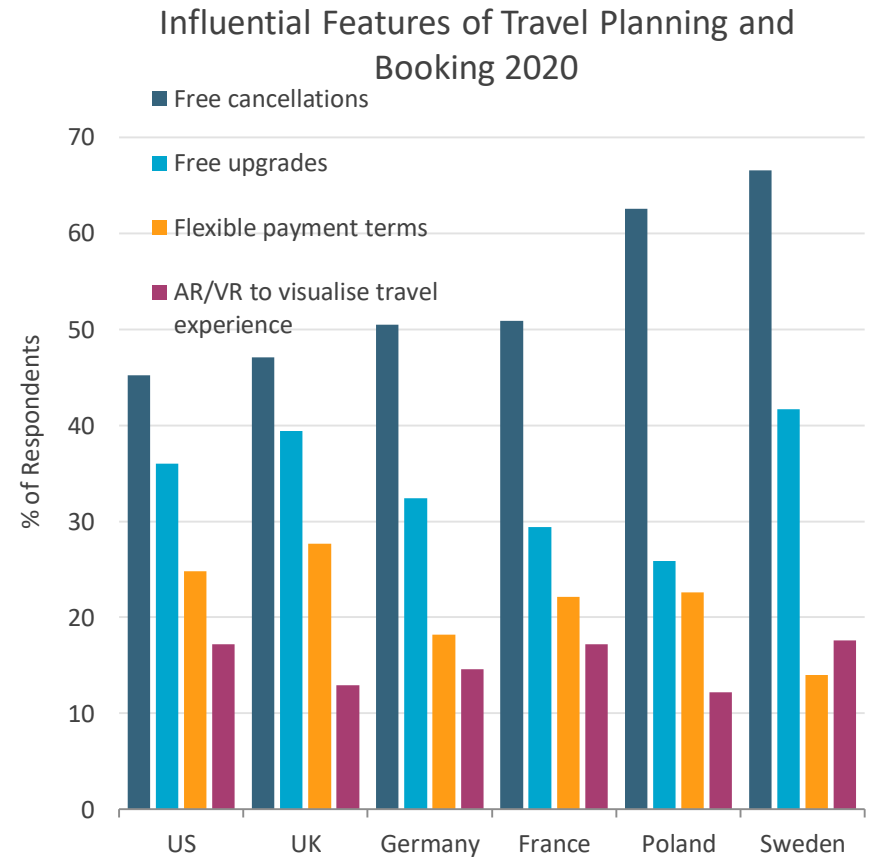
Note: Travel 2021 edition, August 2020

# Consumer-centric

Flexible

Personalised

Seamless and low touch



Source: Euromonitor International – Digital Survey, December 2020

Note: Data not available for Italy, Spain and the Netherlands

# Building trust

Person-to-person

Family & friends

Influencers

## Importance of Family In-Person Conversations 2020 *% of respondents agree they are extremely to very influential*

	Poland	France	Germany	UK	USA
All ages	43.5	41.9	50.4	41.4	46.8
Generation Z	53.1	50.0	57.0	53.3	45.7
Millennials	50.6	50.4	56.8	45.4	51.9
Generation X	40.0	37.8	50.7	38.2	50.7
Baby Boomers	33.9	32.8	40.7	32.2	37.6

## Importance of Social Media Influencers 2020

	Poland	France	Germany	UK	USA
All ages	13.9	30.1	27.4	32.5	38.4
Generation Z	22.1	48.9	38.1	53.3	51.4
Millennials	19.3	42.3	42.1	47.8	53.1
Generation X	13.0	25.7	21.4	23.0	38.7
Baby Boomers	4.3	10.6	14.1	11.3	12.3

Source: Euromonitor International Digital Survey, December 2020

Note: Green indicates a high % share of respondents, compared to red for a low % share

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# Changing consumer values



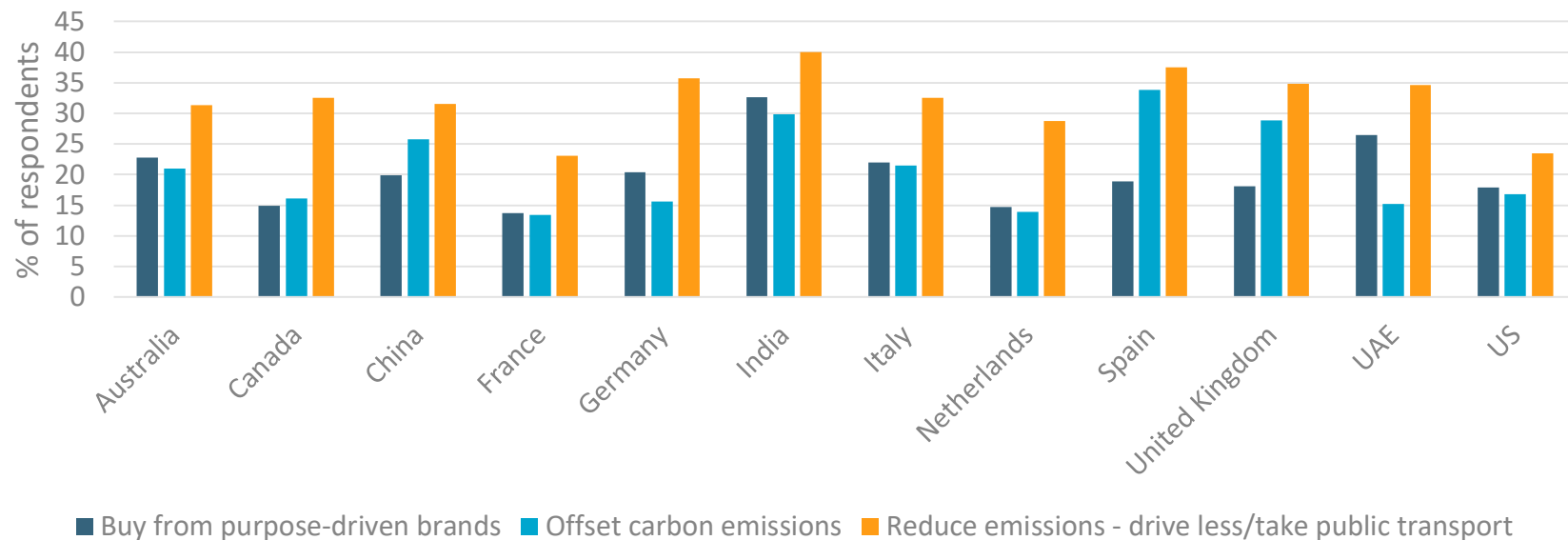
66% of consumers globally  
want to have a positive  
impact on the  
environment through  
their daily actions in 2021

*Euromonitor Voice of the Consumer Survey,  
fielded January 2021*



## Purpose-driven brands resonate

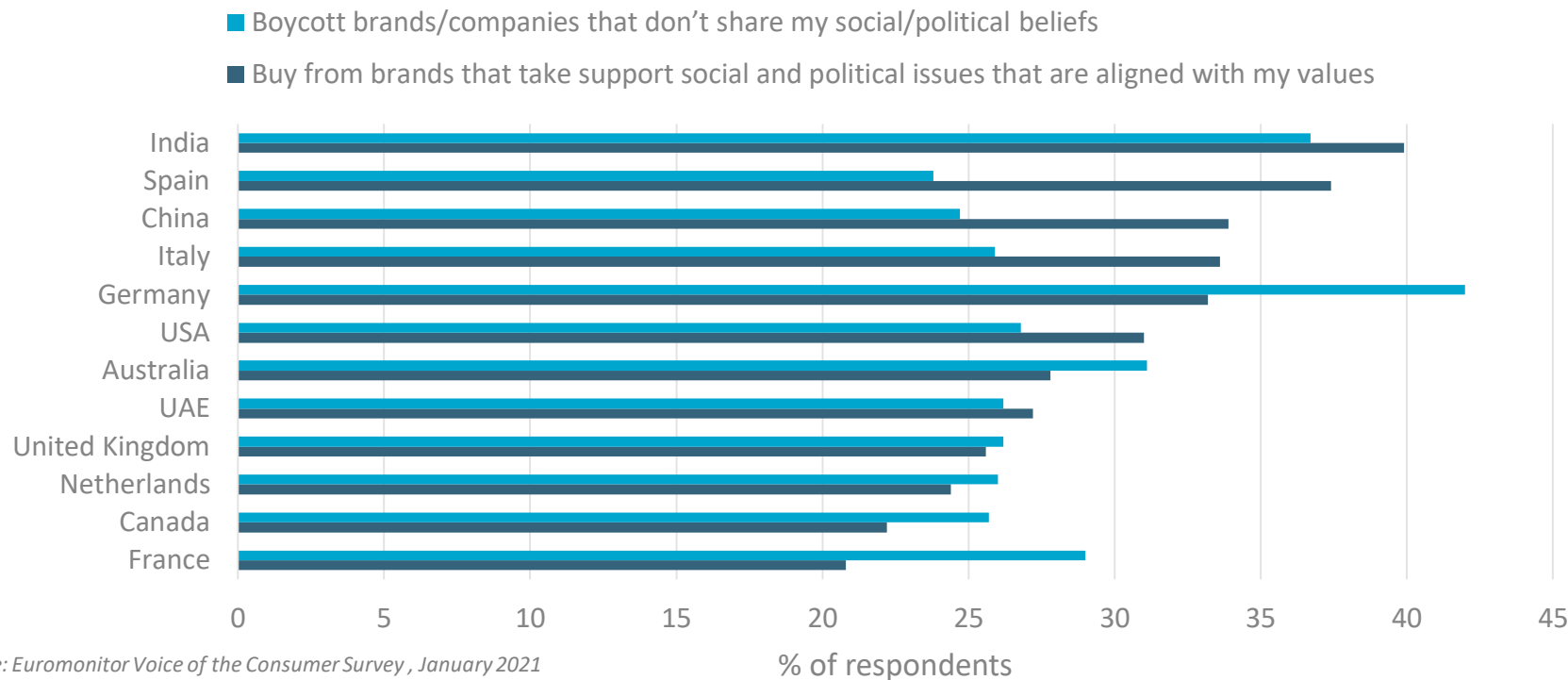
### Green Activities by Key Country 2021




Source: Euromonitor Voice of the Consumer Survey, January 2021

## Social values more prominent

### Social Values by Key Country 2021



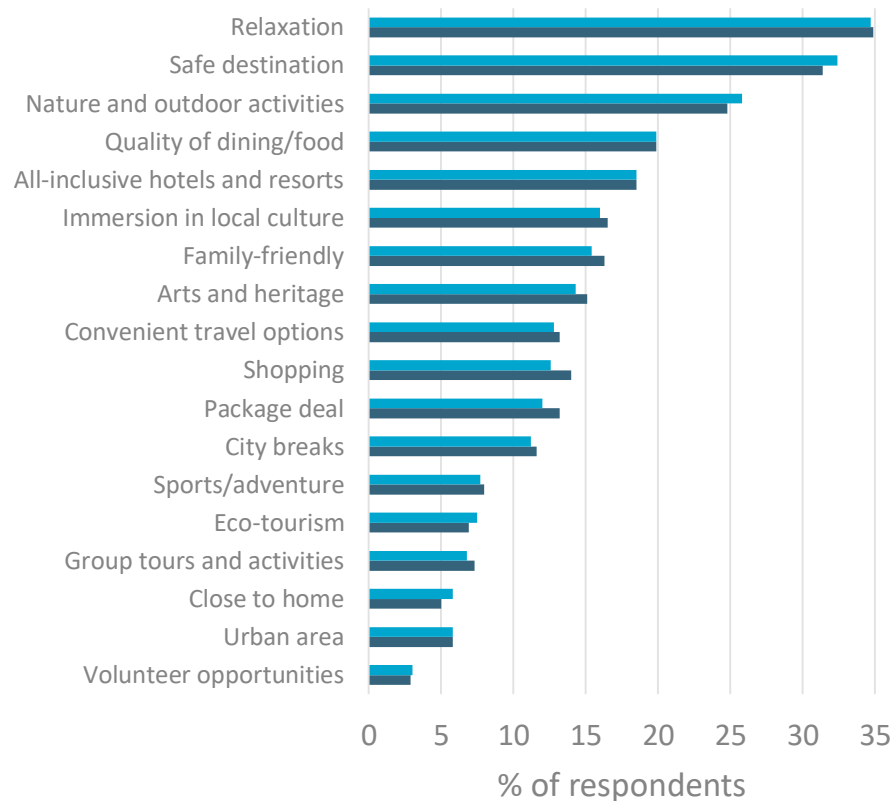
Source: Euromonitor Voice of the Consumer Survey, January 2021



Nature, safety, volunteering,  
sustainable, close to home

Arts & heritage, shopping, adventure,  
packages, family friendly,  
group tours, city breaks

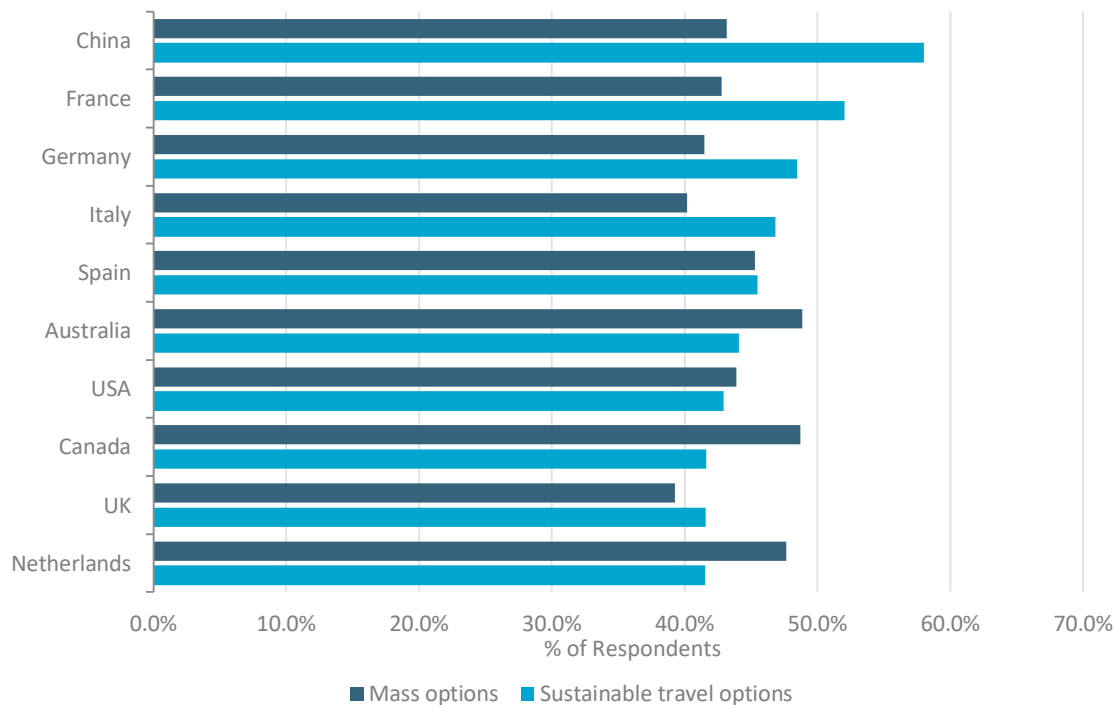
## Global Consumers Travel Preferences 2020/2021



■ 2021 ■ 2020



## Consumer Interest in Sustainable vs Mass Travel Destination Features 2021



Source: Euromonitor International Lifestyles Survey, January 2021

Note: Selected at least one sustainable travel features including eco-tourism, voluntourism, immersion in local culture, sports/adventure, nature and outdoors activities;

Selected at least one mass travel features including packages, all-inclusive resorts, group tours, family friendly and shopping

# 48%

of global consumers seek sustainable travel options

# 52%

of global consumers seek mass market options





















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# Sustainable transformation

## Top 10 countries

- Scandinavia and Europe lead for sustainable tourism
- 65% of Scandinavian travel businesses implement a sustainable strategy vs a global average of 55%

## Top 10 Countries in the Sustainable Travel Index 2020

Country	Rank 2020	2015-2020	2019/2020
Sweden	1		
Finland	2		
Austria	3		
Estonia	4		
Norway	5		
Slovakia	6		
Iceland	7		
Latvia	8		
France	9		
Slovenia	10		

Source: Euromonitor International

Note: rank 1 = best performing; yellow dash signifies no change, green arrow - positive movement and red arrow – negative movement in the ranking

# Croatia performance

## Croatia Performance in the Sustainable Travel Index

	Rank 2020	2015-2020	2019/2020
Sustainable Travel Index	13	▲	▲
Environmental sustainability	2	▼	▼
Social sustainability	27	▼	▼
Economic sustainability	8	▲	▲
Risk	65	▲	■
Sustainable tourism demand	77	▲	▲
Sustainable transport	5	▲	▲
Sustainable lodging	5	▲	▲

Source: Euromonitor International

Note: rank 1 = best performing; yellow dash signifies no change, green arrow - positive movement and red arrow - negative movement in the ranking

# Playing catch up

- Travel falling short in sustainable action
- Positive momentum growing with Tourism Declares and COP26
- Pioneers like Intrepid go from B Corp to science-based targets

## Travel and Tourism Comparative Commitment to Sustainability 2020



Source: Euromonitor International – Voice of the Industry Survey – Sustainability, June 2020

# Key takeaways

Paradigm shift to value  
driven tourism



Optimised benefits to build  
trust for opening up



Digital and sustainable  
transformation critical for  
building strong foundations



Elevated experience for  
visitors



Momentum building to  
tackle the climate  
emergency





# Thank You

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