

White paper 02

Voices of Clarity



Season
21
Roadmap
to recovery

Voices of Clarity

The new reality

Greek National
Tourism Organisation
Poseidonion Grand Hotel
Athens International Airport
Delphi Economic Forum
Traveller Made
Les Roches Global
Hospitality Education
Sotheby's Greece
International Realty
AQ Strategy
Greek Travel Pages
INSETE

Hospitality Clairvoyance

Kanava Hotels
H Hotels Collection
Karatzis Group
Elounda SA Hotels & Resorts
Domotel Hotels & Resorts

Advise from the field

Horwath HTL
Kyvernitis Travel
Revinatē
INcrementUM

Insights: Europe

GNTO UK & Ireland
MMGY Grifco
GNTO France
MCA Communication
SUITCASE Magazine

Insights: Americas

J.MAK Hospitality
Covo PR and Marketing
Kreps DeMaria PR & Marketing

Architecture & Design

Design Ambassador
Elastic Architects
Slow
K-studio

Academic Insights: an overview

Bournemouth University

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**Academic Insights:
an overview**
Bournemouth University

Masthead

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Voices of Clarity is our effort to incorporate the insights and thoughts of 32 prominent hospitality leaders and professionals across Europe & the Americas into one document

When our team started drafting the first Season21 white paper, our key driver was to understand what the coming era of tourism holds in store for us. To get a rough idea of the key dynamics that would forge the tomorrow of hospitality. To familiarise ourselves with the major behavioural patterns that would determine the future of our segment in the midterm.

As we deep-dived into data, information, policies, papers & opinions, one thing became clear: our first white paper was merely scratching the surface of the greater picture, touching on the massive changes which are taking place within the industry. Entry level insights can definitely be helpful, but in order to imbue the decision making process with further clarity, one must ask the valuable opinions of respected leaders in each and every part of the hospitality sector. And this is exactly what we did.

Voices of Clarity is our effort to incorporate the insights and thoughts of 32 prominent hospitality leaders and professionals across Europe & the Americas into one document. I would like to thank each and every one of the participants for their extensive effort and support in providing us with a view into their minds, especially during this challenging time. Especially now that every hour matters, when it comes to tackling the difficulties of what is going to be remembered as the most challenging season in contemporary hospitality.

In these times of uncertainty, an element of clarity is invaluable. I truly hope this second white paper will be of help.

The new reality

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GREEK NATIONAL TOURISM ORGANISATION



Angela Gerekou
President of the Greek National
Tourism Organisation



**The need for a new
narrative in tourism
is an urgent need!**

Interdependence is the main feature of our economy, especially when it comes to a small country like Greece. A weak economy, in need of development in an international economic and geopolitical environment, where uncertainty, turbulence along with fierce competition, are the main ingredients.

Recovery, a much-speculated subject, will eventually commence in the world of tourism. One cannot determine or compare with previous crisis scenarios as this pandemic has found us in the dark, unable to apply a template for strategies and restructures. I recently read a study by Ipsos Opinion, that only 4% of consumers believe that brands need to stop advertising, but they emphasize that the approach, content, and platforms, need to change.

In the same study, I note that the issue of “health and safety” (safety protocols) is now, even more so, the most important requirement of the travelling public. This applies to both business and leisure travel.

It is important to point out and congratulate the coordinated efforts of the Greek Government as well as, the public’s response.

Early action was pivotal in preventing the spread of the virus.

Till today, our country has shown a sense of responsibility and seriousness in the European and international circles. This will be rewarded in the near future, as long as it continues to move at the same pace with the public’s full cooperation.

The government’s priority continues to be on delaying, containing and, preparing the country to minimize serious illness and economic disruption. We must all do our part to prevent transmission of COVID-19 and I ask that you all follow the advice of the Government’s health officer. We need to be united and prepared, now more than ever, as we still have a long way to run and we are heading for uncharted waters.

We are also working in ways to support businesses and organizations affected the most by restrictions on travel and public gatherings.

I am speaking with my Cabinet colleagues daily and the Ministry of Tourism so we are all well informed of the impact on people and businesses in this sector. It is also important to broaden and maintain the production business



and the wider economy until the crisis has plateaued out. This should be the main concern of the state.

The structure and scope of economic policy decisions at a European level is a crucial contributor to this.

During this important period, I also believe that we should work in developing, learning and, equip ourselves with as much “armor” as possible. It is going to be a case of new beginnings in a changing world.

PROGRESS, EVOLUTION, AND GROWTH AFTER A CRISIS

To begin with, we need to maintain communication. Discussing news and exchanging views with our audience is of the essence. Thankfully, with today’s technology, we can achieve this via different online platforms.

Technology alone of course is not a panacea. While adequate privacy and data security protections can be built into the technical architecture of an immunity certificate system, full protection of personal rights and civil liberties depends on the development of an appropriate trust framework. Accompanying legislation and, in some cases, executive orders will be necessary to guide implementation.

With careful technical design and appropriate legislation, such an approach could be effective in the short term as nations struggle to control the pandemic and in the longer term for ongoing disease control as work sites, schools, and public places begin to reopen. It is a period not only for personal development and building strength

(spiritually, mentally, physically) but also to enhance and strengthen collaborations and cultivate existing and new relationships.

Everything moves in cycles so we must act wisely and reprogram, yes reprogram! Focus, strength, and calm thinking /are the tools to go forward during uncertain times.

We ought it to ourselves and to our children, to discover the hidden positives even during a pandemic. Adapt and better oneself as well as learn how to apply improvements in the professional world.

Finally, I want to take a moment to acknowledge that this is a stressful time for everyone. I encourage you all to take care of yourselves and your families, during the difficult days ahead.

I will close these thoughts with a prayer.



Give me the beauty of the soul and claim me with the harmony of soul and body. Help me count the wise as rich... and give me the wealth that only the restrained man can endure and maintain.

Prayer of Socrates

Angela Gerekou

Emmanuel Vordonis

POSEIDONION GRAND HOTEL



Emmanuel Vordonis
President of Spetses Initiative S.A.
Poseidonion Grand Hotel



The Greek philoxenia is now being further enriched with the strong notion of cosmopolitanism and bold spiritual fearlessness

On the foundation of strict interpretation of numbers, objective observation of world progress and our own high achievements in Greece, together with a few puffs of lateral positive thinking, this note would like to contribute in dispersing the clouds created by the current barometric low, and help make this paper as WHITE and as sunny as can be.

When a situation is as serious and grave as the one our world is experiencing at the moment, then periodical ground-breaking reviews, at least for the sake of the debate, are not only reasonable, but essential and worthwhile. Stirring peaceful waters to trigger ripples of change is always useful. Stirring waters in acute turbulence to help calm them down and bring them back to peace and normality is even more so.

With radical reviewing we always achieve clearer, more pragmatic and balanced assessments, we make better predictions, we distinguish between the possible and impossible, the important and the needless as we organise our state of mind so as to avoid misfirings and extremes.

THEN

Then, during the early days, on a

train, on a plane or in a supermarket, a man or a woman, young or old was unknowingly, unintentionally and unwittingly spreading a virus via an innocent sneeze. Unsuspecting neighbours were inhaling, drawing the virus into their own noses, lungs and bloodstreams....

Then, infected travellers were crossing borders, checking into hotels, participating in parties and meetings.

Then, the unexpected, the unknown, the invisible and uncharted, became a shock and scared the planet.

Then, medical systems proved deeply inadequate, doctors and hospital staff were less knowledgeable and unprepared, state leaders had to assess the unknown, the unpredictable, the explosive.

Then, politicians had to make decisions with colossal impact on economies, societies, international relations, human rights and even life itself.

NOW

Now, we are better informed, those who have been infected have stopped participating in the spreading; people don't import the virus into their bodies, neither are they carrying it forward. Borders have been closed, medical systems have switched from alarming



Poseidonion Grand Hotel

inadequacy, to comforting over-capacity, preparedness is at its highest and the human power has been stress-tested across the board, and has been proven responsible and effective. Now, four months later, most countries have passed over the peak of their infection curves, losses are decreasing and new cases are becoming more and more sparse. Now, we have more faith in our countries and trust more ourselves, our civic responsibility has been awoken and we all anticipate and hope for a quick return to a new, improved and enriched normality.

A RISK ASSESSMENT AND MANAGEMENT EXERCISE

We need to distinguish that the scary numbers which we hear about daily, originate from big metropolitan cities, where population densities are

high and thus probability of infection is high. These numbers do not reflect smaller places or islands, turning them into shelters and safe spaces. Also, statistics focus more on those infected and affected, without bringing to public awareness the millions who have not been infected or those infected, tested and found positive, but with stronger immune systems which either keep them totally asymptomatic or allow minor symptoms. It is very reassuring to hear more and more every day about cost-effective test kits with improved reliability which are becoming available in big numbers. The possibility of pre-departure testing and filtering out positive cases is creating a new form of border controls / filters which can protect countries from suspect intrusions. Such controls applied by shipping companies, railways and air carriers for all cross-border travellers,



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The classic vision and mission of Athenian democracy of receiving the alien visitor as an honoured personal friend and guest, to be hosted and guided through the paths of spiritualism of Greek philosophy, is now getting an additional new dimension

will substantially reduce probability of virus transmission and confine risk levels. If we reach probability levels of common flu or car / airplane accident, which are anyway acceptable and tolerated in our everyday lives, we will remove anxiety and panic which is currently prevailing in the minds and hearts of tentative travellers around the world. In case our visitors engage, and most certainly they will happily do, in such pre-entry tests and medical / wellness certificates with frequent validations which can be shown at the arrival at any new destination, complemented by periodical assessments, then we will have achieved a high level of filtration of undesired intrusions. Such requirements may not necessarily be introduced through international conventions, they can become

simple procedural state requirements in cooperation with air carriers, railways and cross-border shipping operators. Of course, similar tests and certifications will be secured for all hospitality staff and attending providers, so each hotel and residence facility can remain proactively protected. After all, the bright sun, dry weather, higher temperatures and clean sea breeze which summer is bringing along, keep us away from the climatic conditions that encourage cold and flu situations. What is, of course, reassuring is the wider understanding that the virus has no wings, intellect or desire to travel and actively invade our bodies. We are totally aware that it is purely up to each and every one of us to avoid becoming a positive carrier, or even to



Poseidonion Grand Hotel



**The numbers for small places and islands
turn them into shelters and healthy
destinations of wellness**

successfully resist the infection, by fortifying our immune systems and personal defences.

A NEW PAGE FOR GREEK PHILOXENIA

Now Greece, on the basis of successfully containing the situation, is actively preparing its hospitality infrastructure and its staff community to once again welcome our international visitors from the beginning of this July. The classic vision and mission of Athenian democracy, of receiving the alien visitor as an honoured personal friend and guest, to be hosted and guided through the paths of spiritualism of Greek philosophy, is now being enhanced and enriched. More than art, mathematics and our open theatres, welcoming visitors into the ancient Hellenic notions of freedom, universal values, togetherness and conciliation, taught in the gardens of the democratic Agora and the Parthenon, now, Greek philoxenia is being enriched with the strong notion of cosmopolitanism and bold spiritual fearlessness. That ideal, which was recognised when Solon, the wise Athenian legislator, and, years later, Alexander the Great, were welcomed by the Egyptian priests and leaders as:

“HELLENES AEI PAIDES i.e. HELLENES EVER ETERNAL YOUNGSTERS”.

Describing thus, as generic background of Greek philosophical thinking and values, the freshness of a youngster’s state of mind, characterised by innocence and “a-phobia” i.e. fearlessness, which allowed the ancient Greek mind to travel and explore beyond the non-boundaries of Hellenic spiritualism.

New hygiene and wellness protocols are now being instilled in us, to be conscientiously applied in the spirit of free will, in a sensible and responsible manner.

Our bright, strong sun, the clear horizons and the fresh sea breeze, loaded with the sea’s precious salt and sterilising iodine, make up the atmosphere surrounding our archipelagic coastline and islands. This microclimate rescues us from the cold, wet and gloomy atmospheres of that stressful past period of uncertainty, which we are now, thank God, leaving behind.

Therefore, this is how we are all preparing in Greece to set the grounds for a healthy and happy autumn and winter.

Sea, sun, spiritual food and the Hellenic warm-hearted and personal philoxenia, will aim at healing, recuperation and rehabilitation this year, more than all other years, in every small spot and island of the country.

“A-phobia”, joy and a great smile are the tools that will reinforce “anosia” and immunity, strengthening the resistances, we will need, for whatever may follow, during this coming autumn and winter.

Together, of course, with an abundance of sun, sea, fresh breezes, and a little bit “mezedaki” and “ouzaki” on the seaside!

Ioanna Papadopoulou

ATHENS INTERNATIONAL AIRPORT



Ioanna Papadopoulou
Director, Communications & Marketing
Athens International Airport

“
Navigating the “De-COVIDization”
era: in the search of
new – aviation - coordinates

In the BC – Before Covid – era , airports and airlines were focused on delivering operational efficiency and process optimization, improving passenger experience and driving business growth; they were also continuously exploiting new opportunities, substantially contributing to the economic and tourism growth of the regions / countries they served, strengthening at the same time their role in the local, regional and national economies’ development.

By entering the pandemic phase, with locked- down societies and grounding of almost all airlines worldwide, aviation embarked on an uncharted “non-journey”. The industry which is tantamount to charts, navigation and journeying has now lost its coordinates; to navigate the “De-COVIDization” era, it urgently needs to re-build new aviation charts and redefine and adapt its course based on new coordinates.

i. Institutional & Regulatory Framework: the institutional players and the decision-making processes have changed. The gradual reopening of the markets,

the respective prerequisites, the time and pace of the reopening, operational terms, business issues even, will be considered and decided by the health/ state authorities/ experts for an undefined period of time. Business continuity will also be continuously at stake, with the degrees of -business and operational- freedom depending on possible outbreaks of the disease and the (successful or not) course of combatting the pandemic.

The open skies regulatory framework with global, unconditional and unlimited access to markets, which used to be the status quo in aviation for approximately two decades, seems to be put aside for a while. The idea of “travel bubbles” or “travel corridors” is now emerging. In simple terms, this means that the reopening of the aviation market will be gradual, under specific criteria and as it seems, it will not initially entail a general opening of the borders and a full lifting of all bans and restrictions. Markets that have successfully brought their coronavirus outbreaks under control seem to be the ones to be “connected” first, under strict pre-travel requirements as set by the experts. Schemes like this are already considered by countries that have, so far, combatted the



Photo © Thomas Gerasopoulos / AIA

pandemic successfully.

ii. Digitalization: In the BC era, airports were continuously and constantly transforming to data-driven organizations. Digitalization, AI – and the -so called- 4th Industrial Revolution were at the forefront of all discussions, the basic themes in most conferences and core strategic topics in the airport management boardrooms. With data being generated across all stages of the airport operations and the passenger’s journey, an environment rich for digital technology and analytics was there, waiting to be exploited and turned into insights and informed business decisions. Disruptive technologies, extending from Artificial Intelligence and Machine Learning to Immersive Experience, Robotics and Autonomous

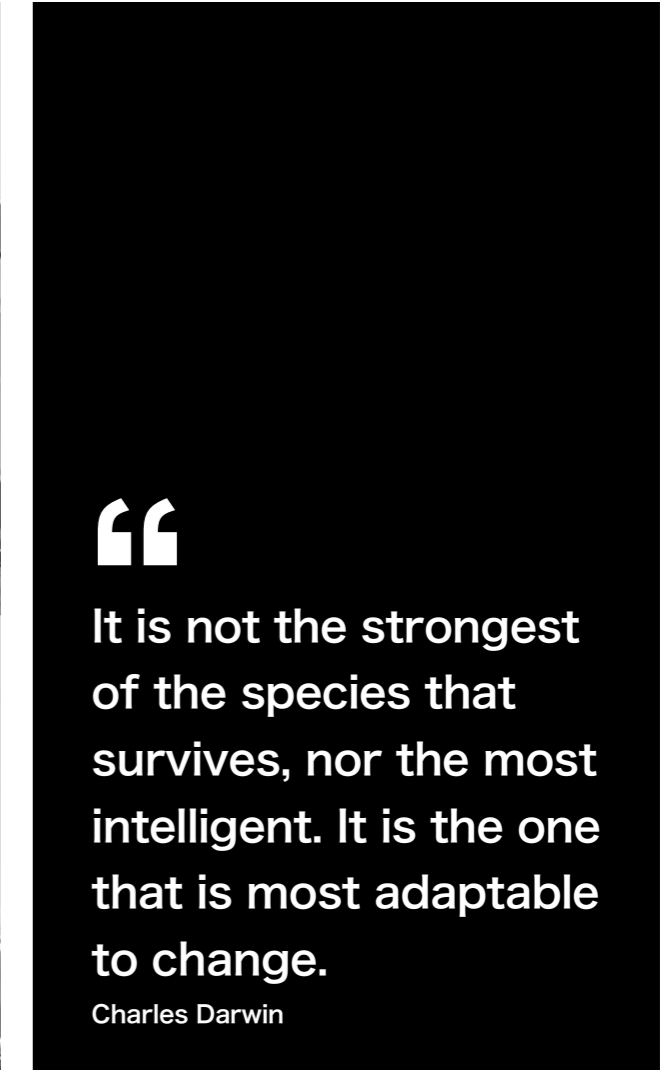
Vehicles had already made their way to the airport’s everyday operations and management practices. During the De-COVIDization era the strict prerequisites set by the health / state authorities for the gradual and controlled reopening of the aviation market and the need for restoring the consumers’ trust and confidence in air travel call for technological advancements, rewriting software and re-architecting a digital ecosystem. Focus will shift to the enabling technologies that will not merely support the “Sense of a Digital Place” but also, the “Sense of a Safe – in terms of Public Health – Digital Place”, the data- generating sources being, among others, virus-tracking apps and innovative technology that will:

- Facilitate health certifying processes

- Respond to the public health and safety challenges where analytics can make a difference
- Analyze factors influencing travel decisions and
- Predict travel patterns and passenger behaviors

Advanced technology, new sophisticated tools in place and digitalization will prove to be “the license to re-operate” for aviation in total, both in the minds – and travel decisions – of the consumers, as well as in the minds – and policy decisions- of health / state authorities.

iii. Airport Retail: A new Airport Realit(y) seems to be emerging. Restoring consumers’ confidence to air travel will also entail the



It is not the strongest of the species that survives, nor the most intelligent. It is the one that is most adaptable to change.

Charles Darwin

restoration of the consumers’ trust to the airport retail. The need for the minimization of risk, possible introduction of social – distancing measures and the establishment of contactless processes will most probably point the way to major spatial changes in the airport terminals and to the expansion of digital, online platforms.

From the business perspective, the dire necessity for liquidity and new sources of revenues are inevitably leading to innovative ideas and practices that will establish, at least partially, the non-aeronautical revenues’ non-dependence on passengers’ daily throughput and volumes.

In the “De-COVIDisation” era, the three main “R’s” of the airport retail reality, ie. Relationship with the consumer, Re-setting expectations and



Photo © Thomas Gerasopoulos / AIA

Re-discovering the customer experience will have to be “Reinvented” through the rebuilding of the airport business ecosystem.

iv. Human Factor - The Repositioning: It has already commenced, abruptly overturning - and, at the same time, modernizing - established practices at the workplace. A new distance office work culture is emerging through the work-from-home digital platforms, interactive dashboards and connected multiple devices. A sense of flexibility and “freedom” is apparent, it seems however that eventually, creative, solid practices and a new “toolkit” for the reinvention of the work culture that will keep the employees involved in and connected to the company, will be needed.

In terms of operational efficiency and front-

line work, Machine Learning and Robotics will be instrumental. Robots are already hard at work in hospitals, sterilizing rooms, delivering medication and supplies and assisting medical staff to work much safer and more efficiently. Robots are also already in place at airports for passenger assistance, security or cleaning and it seems that the need for contactless processes and minimization of health risks as well as operational efficiency and subsequent cost-cutting gains are pointing the way to further exploitation of this model at the airport’s working environment, changing, at the same time, the end-to-end passenger experience.

v. Passenger Experience: In the BC era, the airport’s passenger experience “toolkit” had

two major components: the operational and the emotional aspect. On the one hand, “seamless” travel was a term used frequently to describe the optimum passenger experience; self - service technology, artificial intelligence, real-time information and data- sharing were some of the “tools” deployed to achieve a seamless passenger experience, while, on the other, additional components would include more “intangible”, yet extremely valuable aspects; hospitality, friendliness and courtesy of staff, entertaining elements and overall ambience were the elements that made an airport experience unique.

In the “De-COVIDisation” era, Health and Safety will prevail; from social -distancing and protective gear to massive testing, health - certifying processes and additional self- service

equipment, passengers will be willing to give up time and personal details over the “Sense of a totally Safe - in terms of Public Health- Place”. Striking the balance between the new “seamless” and the “intangible” aspects will be the main challenge, ultimately defining the new unique airport experience.

vi. Airport Branding & Communication:

In the BC era, consumer satisfaction and creating unique passenger experiences were key elements of the airports’ branding. The airport’s consumer of products and services being the airlines, retailers, concessionaires and other business partners, the passengers/ visitors and the general public, this multi-dimensional consumer base and the need to cater for their wants and needs in terms of products and services, has led airports to realize that, as in the case of other businesses, creating and communicating the value of their brand is vital, the brand being one of the most important, intangible assets of the firm. During this “De-COVIDization” era and in line with the basic branding principles “Brands live in the minds of the consumers” and “Branding is about delivering promises”, airports are expected to re-construct their brands by building-in all those components that will substantially contribute to the restoration of the consumer’s trust and confidence in air travel, through:

- the re-establishment of their identity as “Safe - in terms of Public Health - Places”
- the reorientation of their branding and communication strategies aiming at establishing and maintaining a constant flow of open and frank communication to timely inform, facilitate and engage its multi - dimensional consumer base and, by all means,
- the even closer alignment with the branding of the destination they serve

vii. Finally, Leadership; at this stage, no one knows how long the De-COVIDisation era will last and what will be the shape of aviation - regulatory and business models, players, operational status - in a couple of months from now, let alone, a year or two.



Photo © Thomas Gerasopoulos / AIA

While timely, informed decisions are imperative for the successful management of airport businesses, all three key elements (time, data and information that could lead to business decisions, as well as the decisions themselves) will now be determined, at a great extent, by factors and agents that will not be within the organizations' influence and reach.

At the same time, the roles and responsibilities of business leaders have dramatically changed during the last few weeks, along with the business and corporate priorities. Maintaining liquidity, controlling costs and balancing complicated labor and legal issues are - and will be for quite some time- the main priorities, amidst health and safety concerns.

The road to a new normality and full De-COVIDisation will be a long and winding one, with recurrent disruptions along the way. Now more than ever, new leadership qualities and behaviors are needed in this battle for survival: Deciding with speed over precision, Re-Inventing solutions, Communicating openly and frankly, Taking care of people, Engaging for impact.

And Adapting boldly.

Yiannis Thomatos

DELPHI ECONOMIC FORUM



Yiannis Thomatos
Vice President
Delphi Economic Forum



Personal space will become really important and affect our choices in our way of traveling

Some say that the current pandemic will trigger radical changes across multiple sectors; do you see this happening in hospitality? If yes, in which way?

In an on-going situation like the Covid-19 pandemic, I think all predictions are premature, as there are too many pieces of the puzzle missing so as to see the big picture.

The only certainty is that the longer it takes to have a vaccine, the harder it will be to return to world traveling as we knew it. Although my expertise is in event planning, I can say a few things out of my experience in the conference sector, which makes part of the broader hospitality industry.

Obviously, as long as the pandemic is still evolving, the sector will have to adjust to current circumstances and needs. I believe there will probably rise a new, hybrid model for events that will combine a live, small-scale event with strong virtual elements, addressing a larger crowd.

Mega-events will probably take a toll at this phase as people will be more reluctant to gather in large groups and closed spaces.

However, no matter the fear, let's not underestimate the human need for face to face networking.

Which are the two most important disruptions that you expect to take place in the hospitality industry in the years to come due to the current crisis?

As far as the event sector is concerned, besides the hybrid-model event mentioned above, we will most likely see an increase in small, exclusive events with special interest and content, aiming to inner circle stakeholders.

In addition, the event venues will definitely have to adjust to the new space requirements – as for larger spaces, for less people. On the other hand, the tourism industry will probably go through major changes, starting from the very same vehicles we travel in. Air companies are already considering reducing seats to enhance security, while I believe we will soon see a comeback in train and car transportation which will boost the feeling of safety and independence, and revive internal tourism and the oldie but goodie road tripping. The space rule goes for hotels as well, especially super-luxury hotels. I believe hoteliers will have to bet on a “Covid-safe” label,



meaning constant sanitation, multiple tests for employees and guests, on-site medical services and a lot of personal space for clients.

At which pace do you expect travel to make its recovery? Do you expect a quick (V shaped) rebound or something different?

It's hard to say whether the rebound will be V, U, or L shaped, as it clearly depends on how long the pandemic will last. The rebound will also be based on the ways in which each country is going to confront the pandemic, and whether there will be a coordinated global effort. It also depends on finding an efficient medication, and the steps we are going to take going in that direction. In any case, we should never lose our faith in the deep desire for human contact, whether it's a formal handshake or strong hug: people are always in need of getting in with each other.

What are the key human behavior patterns that will drive change in travel from 2021 onwards?

The need to create life experience, and at the same time the need for greater personal space, which I find crucial. Personal space will become really important within the next period, and will affect our choices in our way of traveling, our accommodation (would you prefer a hostel out of an AirBnB apartment?) our destinations (crowded India or remote Iceland?), our budget (expensive resorts or low-budget road trips?). The only pattern that will stay the same is our innate need of exploration of life and the way we decide to spend and cherish our free time with ourselves or our beloved ones.

“

I believe there will probably rise a new, hybrid model for events that will combine a live, small-scale event with strong virtual elements, addressing a larger crowd

Quentin Desurmont

TRAVELLER MADE®



Quentin Desurmont
Founder & President
Traveller Made®



**Unparalleled service is taken for granted.
In the ultra-luxury segment you do not
buy service, you buy a fantasy**

Some say that the current pandemic will trigger radical changes across multiple sectors; do you see this happening in your primary field? If yes, in which way?

Over the past few weeks I have been speaking with a lot of people across various markets and verticals, from hoteliers to villa owners and yacht brokers. The questions on their minds are no different than those on yours. This global pandemic has made clear to all of us that our day-to-day life is going to change in the foreseeable future. In trying to understand and process what we can expect tomorrow will bring, I must start by deep-diving into my own state of mind, and examining how I feel right now, on a human level. The answers are clear and provide a trustworthy insight for the next days of hospitality:

1. People are feeling more vulnerable than ever right now. They understand that there is no such thing as being invincible; we are not superhuman, and cannot avoid our core weaknesses.
2. Family has become more important than ever. This lockdown has increased bonding time, reintroducing us to our loved ones and making it clear in

- the most profound way that we have been missing out on a lot.
3. People have progressed more in understanding that our lifespan is finite and time is the most precious thing in the world. They have learned to focus more on what's most important to them.
4. Sustainability has been embedded as a core value of tomorrow's growth. Now more than ever, the true meaning of respect towards our entire ecosystem is understood.

All the above significantly impact our clients' decision making processes when it comes to travel. Destinations, experiences and concepts matter more than ever. Travel is no longer a break from ordinary life; it is becoming a significant part of it.

Do you identify with the opinions that surfaced recently suggesting that regional traveling will gain more traction in the near future?

Regional travel will gain traction, but this does not necessarily mean a disruption in luxury travel. The idea that long-haul travel is reserved for the upper-class customer segment belongs to the past. People will - and should - stop travelling across the world just to lock themselves in a fancy resort



that resembles nothing of the local ambience & experience. Secluding yourself in a resort makes sense only if it takes place as part of an overall travel concept and brings in meaningful added value. And added value comes only from experiences that resonate with the request of your client. A seasoned travel designer will deliver value even within the borders of your country. The key attribute is the quality of the experience and its relevance to the specific needs of each traveller.

What are the key changes that you expect to see in the travel mentality?

People want to dream. People want to be inspired by a hotel brand or a destination. Especially now; especially when it comes to high-net-worth individuals. In luxury, perfection is the absolute minimum; high quality is considered a prerequisite. Unparalleled service is taken for granted. In the ultra-luxury segment you do not buy service, you buy a fantasy.

The key - especially in the years to come - is in the brand narrative and how it will inspire the discerning traveller. Every travel inspiration is a fantasy that has come to life. In order to properly address the needs of tomorrow's travellers, hospitality brands need to embrace their core values with much-needed storytelling, and create those fantasies.

Dr. Dimitrios Diamantis

LES ROCHES GLOBAL HOSPITALITY EDUCATION



Dr. Dimitrios Diamantis
Dean of Graduate Studies & Professor
Les Roches Global Hospitality Education



**In the medium term,
the industry will show
signs of recovery**

Managing the global pandemic: a view point from an educational perspective

Any crisis, in this case a global pandemic, has an effect on the society both in terms of its human cost as well as its business routine. That inevitably affects educational institutions as their curriculum delivery has been impacted. Our educational plans for the year 2020 were to deliver our curriculum on a face to face model. With our Les Roches sites in China, Shanghai, Spain and Switzerland our program model was disrupted earlier in the year with the Les Roches Jing Jang site in Shanghai under restriction and its programs then delivered via remote learning.

Through our experience in education and as an establishment for international students for 60 years, we have been very much proactive with careful measures of hygiene from our student graduation event in late January and thereafter. We have worked on different scenarios of learning delivery for the start of the year and then we switched to remote learning in a very smooth way when it became a necessity. The plans did not change as far as the curriculum and its learning outcomes. What has changed is the postponement of different campus

events and study trips in Shanghai, Dubai and Chicago for our graduate students. As our educational model is very agile and global that also provided a good platform that we were able to adapt to this short-term reality of remote learning.

How has the outbreak affected your business? What are your biggest challenges?

The outbreak has definitely changed our business in terms of the educational delivery of our programs. In effect, we had to deliver them remotely. Our biggest challenge was to manage the natural worries of our students of 95 nationalities. Next, our faculty and staff have been very agile and understanding and as a community we have adapted well to the new reality. With students and employee health as a paramount importance, our biggest challenge has been to make sure that everyone is well taken care of as well as staying healthy during the pandemic period.

What are you currently doing to tackle the situation?

We have developed our educational systems remotely and at the same time we are looking after a number of students on campus. Through regular meetings with our stakeholders: students, faculty and staff as well as the wider



In the mid-term and as with any historical events, the society managed to flourish after a result of a crisis

community, we are constantly monitoring the situation. At Les Roches we have been very proactive and anticipated that the outbreak may reach our shores. As such, we had educated our population in healthy measures before our educational provision moved to remote learning. Our community has shifted to working from home and at the same time, we have been carrying our regular meetings with all the community. Being healthy and well is of a top priority at this stage and as such we constantly monitor and communicate our situation with our community and local government agencies.

How do you see the future?

The immediate future will be enigmatic in terms on how the industry will respond. With a number of economies depending on tourism as a contributor to their balance of payments, certain countries have already started to take “small steps” to a new normality. This norm will be different. Consumers will be hesitant at start, social distancing may take some time to become a social interaction and as such the travel may start being slow at first.

In the mid-term and as with any historical events, the society managed to flourish after a result of a crisis. Although the global pandemic has been a relatively short-term event, its effects will be felt much longer. Its economic impacts will be showcased in direct, indirect and induced effects where the notion of a holiday may be may be questioned into a question. As such, in the medium term, the industry will show signs of recovery, once the consumer gets the confidence that there is no health threat to the places that they visit.

As far as the educational institutions, the challenges will be to showcase adaptability and engage in the sort of practices distinctive to their activity. For us as a top ranked hospitality school it means to work closely with our industry patterns, having an engagement with our students as well as to take the lead in educational practices both in delivery and research.

Hospitality at its core is about understanding the gestures of service which now are more important than ever, especially after a global crisis. Taking



the lead with an entrepreneurial flair - that is something that our school ethos is founded upon and a principle that runs through the veins of our institution.

In such times, the way forward for the hospitality and tourism industry alike needs to be dynamic, more sustainable and supportive across industries. Especially after a crisis, different industries need to work closely together in very much circular economic principles that offer a mode of activity that is innovative, implicit and above all collaborative for the benefit of its consumers and the future generation, in this case the students that are currently with us.

On-line certificates

To enable students to make the most out of their

remote learning period, Les Roches students have been granted private access to join small group sessions coached by experts in Revenue Management, Hotel Valuation and Spa Management. The additional two-week courses available since the end of April this year have already proven very successful with almost 4 500 students already registered from 90 countries worldwide.

The courses “Hotel Market Analysis and Valuation”, “Hotel Revenue Management”, “Excellence in Spa Operations” and “Maximizing Spa Profitability: Financial Planning for Spa and Wellness Centers” are all designed to meet specific industry needs and will allow students to obtain 4 professional certificates in addition to their academic degree.



Unique series “Leading Hospitality Through Turbulent Times”

Les Roches students will also be able to access exceptional new series of live online classes entitled “Leading Hospitality Through Turbulent Times”. From the initial impacts of the crisis and the lessons to be learned from past cycles, to a potential recovery and what hospitality is likely to look like post-COVID-19, students will gain a thorough understanding of how Hospitality industry is being affected by the crisis while learning from experts on ways to face up to it in the most efficient way possible. Every week between now and the end of June, senior faculty from Les Roches and its sister brand, Glion Institute of Higher Education, will be joined by expert guests from the worlds of hospitality, luxury, finance, academia and research.

The sessions will be around three main topics: Global Trends & Economic and Financial Impact, Strategies & Tactics and Organizations, Leadership & Careers. Yves Schemel, Emeritus Professor of Political Science and International Relations at Sciences Politics Paris, will share some of his outstanding insights. So will, among many others, Steve Hood, Senior Vice President of Research for hospitality data and analytics specialist STR, Robert Alter, Chairman Emeritus and Founder of Sunstone Hotel Investors, Inc., Michel Girardin, Economics Applied to Finance Professor at University of Geneva, Chris Mumford, CEO Cervus Leadership. This content exclusive at first to the institutions’ students will be available to all through the schools’ websites to give the Hospitality communities some insights as they look to rebound.

Savvas Savvaidis

GREECE SOTHEBY'S INTERNATIONAL REALTY



Savvas Savvaidis
President & CEO
Greece Sotheby's International Realty



**A holiday home becomes
more tempting than ever**

Some say that the current pandemic will trigger radical changes across multiple sectors; do you see this happening in your primary field? If yes, in which way?

As long as the pandemic will come to complete eradication, within a year or so, I do not see radical changes in our industry. The luxury holiday homes sector has always served a primary need for our clients, mainly High Net and Ultra High Net Worth Individuals. It is more than just a purchase of a house in the sun. It is about owning a personal retreat, a sanctuary, a place to bond with family and the loved ones, it is about creating priceless memories with the children and grandchildren, it is about enjoying valuable regenerating time.

Actually, during the crisis, our data indicate a consistent and significant increase in demand, as the pandemic seems to accelerate decisions connected to personal wellbeing and leisure. The acquisition of a luxury holiday home is certainly one of those. A holiday home becomes more tempting than ever especially now that technology allows working from home in an effortless manner. Demand for beautiful modern high tech homes, with

large openings, large gardens, secluded and private is already on the rise.

Greece being a low-density population country holds a competitive advantage in relation to other real estate destinations. Our country is an eco-paradise in the heart of Europe with hundreds of different dispersed locations and islands, diverse landscapes of immense beauty, authentic ways of life, warm and welcoming people, healthy climate and daily living in a place rich of history and culture. All being the perfect ingredients for an ideal second home or relocation destination.

Which are the two most important disruptions that you expect to take place in your industry in the years to come due to the current crisis?

As more and more businesses and consumers become familiar with video tours and teleconferences it is evident that **video** will be the dominant force of communication for the years to come. Technology will evolve and high-quality communication platforms will be more affordable and easy to use. Professionals will need to master the art of skilful tele-presentations to be competitive especially in an industry that is based on empathy



Elysium | Mykonos

and on establishing high levels of trust early on the business relation.

In addition, embracing creativity, change and flexibility, adopting and leveraging technology innovations as well as keeping up with learning new skills will be making the difference between failure and success. In a fast-evolving social and business environment professionals will be required to adjust swiftly to new challenges.

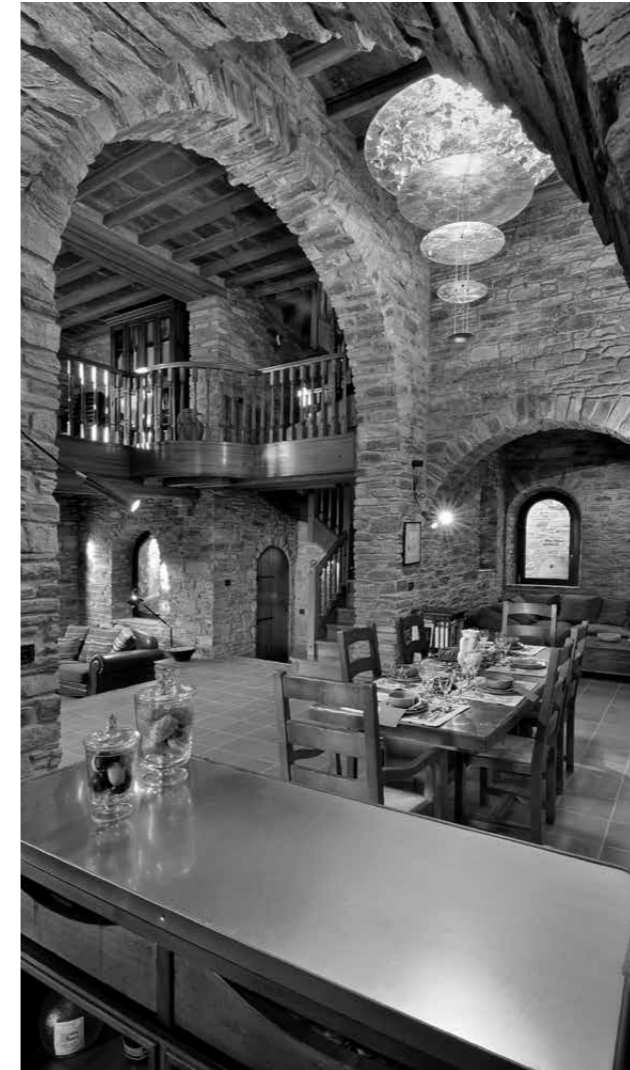
On the basis of your insights from your clients & partners, which destinations are showing the most resilience during this crisis, and which will be the first to recover?

Luckily Greece offers an abundance of idyllic destinations. Places like Paros, Tinos, Kea,

Milos, Paxos, Ithaca or Meganisi are amongst the islands that have sparked an interest to international buyers in the search for their place in the sun. Most of the Greek territory is scarcely inhabited providing a real sense of safety.

At which pace do you expect travel to make its recovery? Do you expect a quick (V-shaped) rebound or something different?

Our country's tourism is depending heavily on air travel. It is hard to know as at the moment there is still not enough visibility on how visitors will be travelling to Greece in large numbers. However, even in the presence of a reliable test, it may take some time for the traveller to feel secure and fly as frequently as before.



Mistico | Tinos

Up to the complete eradication of the disease, it is not easy to predict how things will evolve making somehow uncertainty the normal condition for the foreseeable future; definitely not ideal for a quick V shape rebound. Still, I am optimistic that we will find ways to come out of the crisis earlier than we think. After all, in only two months there has been significant progress on combatting the disease worldwide. By focusing too much on the problem on a daily basis we may lose sight of the perspective of time.

Which is the key action that destinations can take at this time in order to benefit in the long run (2021 and onwards)?

Health and Safety have always been a key prerequisite for choosing a destination whether it



Actually, during the crisis our data indicate a consistent and significant increase in demand, as the pandemic seems to accelerate decisions connected to personal wellbeing and leisure

is for a real estate acquisition or just holidays time.

It is essential that a robust and efficient **health care system** organized in a decentralised manner will play an important role in the years to come to Greece. It is a challenging project because of the fragmentation of the territory. Besides reinforcing Greece's identity as a safe destination it will also enhance the quality of life for its permanent inhabitants.

Even more valuable than transportation infrastructure seems to be the accessibility to a **high-speed internet network**. A growing number of services will be provided online starting from government agencies to entertainment companies such as Netflix



Gaia | Milos

or business applications, video conference meetings and medical care.

Green energy projects, as well as investments that will safeguard the national heritage both natural or manmade, will need to be accelerated. As more and more people will become sensitive to sustainable growth developments the destinations that will wholeheartedly embrace them will stand out from their competitors. Regeneration projects based on a cooperation between the local authorities and the private sectors such as the Piraeus Port Plaza will be having a positive impact both on the quality of life as well as the economic growth.

One of the challenges that the luxury real estate industry will be facing soon is the scarcity of luxury homes. **Modernising our outdated planning laws** should be the first step by allowing greater flexibility in licensing developments and single homes.

All the above are easier to implement than one can think. I am optimistic that the pandemic will be a real opportunity for Greece to unleash its real potential. The time has come.

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The luxury holiday homes sector has always served a primary need for our clients, mainly High Net and Ultra High Net Worth Individuals

Yiannis Tsakalos

AQ STRATEGY



Yiannis Tsakalos
CEO
AQ Strategy



I consider three things to be vital for the next day of tourism: Adaptability, sustainability and, of course, a digital transformation in preparation for this new era

How will the current pandemic affect hospitality?

The worldwide lockdown which we are experiencing is something that nobody could have imagined. The last twenty years were a whirlwind of events which forever altered the world of tourism on an international scale, from 9/11 to the MERS & SARS viruses and the swine flu, and yet the COVID-19 pandemic is completely different from everything we have experienced so far, which is why I believe that its consequences will be unprecedented. In this very difficult conjuncture, ruled by fear and lack of security, it is our duty to carefully study these developments, understand the situation, adapt and, finally, draft an action plan for the next day with the required level-headedness.

Our past has shown that tourism has shown resilience, and I believe that we can expect the same from our present. The last decade was the best ever (until the arrival of the next one, that is). It's a given that we will need more time to recoup from this crisis but the general estimation is that in 2020, tourism in Greece will face a reduction in total revenue that will range from 80% to - best case scenario - 50% in comparison to

2019. Slowly but surely, it seems that there will be a recuperation in 2021, but everything rests on whether or not the vaccine will have been found, as well as respective medicine, so that this problem can be faced head-on. I predict that in 2021 there will be around 75% occupancy in comparison to 2019. The only certainty is that the new normal will be different in every possible way.

What do you expect that the rate of return to normalcy will be?

What we are now experiencing is unprecedented. Nobody can predict anything with certainty, so I propose that we look at the rate of return to normalcy in terms of the next decade. I believe that this will be a year when "survival" is everyone's priority, with us approaching normalisation in 2021. All we know for sure is that we need to be prepared for tomorrow.

Now is the right time to see this problem as an opportunity, to prioritise "we" over "me" and to invest in tourism in new ways. Transforming this survival plan into a plan of sustainable growth, with tangible results, will bring hope to the tourism sector, also affecting all the other sectors which are directly or indirectly connected



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The changes which we will witness in the next five years mainly due to artificial intelligence, machine learning and big data will be larger than those which we experienced in the last fifty years. Those who realise this in time to ride the wave will reap the benefits

to it. Apart from its great contribution to our country's GDP, tourism is the international ambassador of Greece's "brand". The value we imbue it with will shine through in olive oil and wine production, among others. This is an issue which concerns us all, which is why it should be supported in every possible way.

I personally believe that the seven years between 2023 and 2030 will be the best that worldwide tourism has ever seen. I know that this is an optimistic approach, however I presume that the modern need for new experiences, which will offer "emotional growth" will multiply after self-isolation.

According to studies, about 50% of the world's population will belong in the "middle class" in

2020. These numbers were taken just before the beginning of the crisis but, because the economy will rebound sooner or later, I believe that based on the theory of the "spring" (being compressed before "bouncing back"), it will return to a level of normalcy and adopt an upwards route.

If 2030 finds more than half of the world's population in the middle class, with great purchasing power, this will mostly comprise of Millennials and Gen Z's, generations born to technology, born wishing to collect experiences and travel the world. If we consider that 40-50% of these individuals will hail from China and India, I believe that new circumstances will be created and lead to a rebound, which, when looked back on in terms of this decade, will present a "V" shape.

How can we expect to move on to the next day of tourism? What's the profile of the traveller of tomorrow? Where do hoteliers stand in all this?

It's going to be a very difficult year for those in the hospitality industry, and tourism as a whole. It is absolutely clear that a complete strategic plan for future action with a beginning, middle and end is needed; this will paint a clear route to tomorrow, a common course for the new normal, since nothing will be the same.

What we knew until two months ago no longer exists. Everything is changing, with guests themselves first and foremost. If they had 40 or more touch points affecting their decisions so far, a few more, crucial ones are being added. Whether a company is focused on preserving

the health and safety of guests will now be their main concern, as will be whether the destination, company and brand care about sustainability on a communal, personal and environmental level. If the hoteliers themselves have yet to take strides in this direction, it is certain that the traveller of the future will call for such affirmative action, so complete readiness is required. Marketing will be tremendously important in the next day of tourism and have a decisive hand in growth, because of its role in reading the market and fulfilling its needs in the best possible way.

The changes that will be made in hotel booking processes are particularly interesting. The booking window may change from up to a year and a half to a mere month or a week prior, especially for the 2020-2021 seasons (with



an emphasis on summer 2020) when last-minute reservations are expected to skyrocket. “Last minute” packages are also going to be key for tour operators and online wholesalers.

If we consider, from the side of the companies which deal in large numbers of tourists, options for this year are truly low, inadequate for curbing massive losses. Greece falls under this umbrella, and we must find a way to make it through this situation without damaging what we have made for ourselves from its appropriate management. The economy needs to reinforce and cases must remain minimal so as to allow companies to survive until we navigate into calmer waters. In my opinion, there is a sweet spot, where (with a manageable amount of difficulty) all these different parameters can find balance and maximise output, whilst keeping the rest of the indicators at a low level.

As I mentioned earlier, the average ADR will need at least two years to return to its 2019 levels. Strong Revenue management will be very important in trade policy, across the spectrum of tourism. More than ever, it is crucial that the right product is sold at the right time, to the right consumer, in the right package. We should not follow the logic of “I used to sell 300 so I will continue to sell 300”, nor should we switch to “Last year I sold 300 and this year I will sell 50”. It’s crucial to remain flexible and adapt to the new realities that will present themselves every day, if not every hour. The usual key players of the market (Booking, Expedia, Hotels.com, Ctrip etc), despite the difficulties that they

are now faced with, will be here tomorrow, altering their products to fit the “new normal”. We may even welcome new players to the online market, super-platforms which we cannot yet imagine, as we bear witness to bankruptcies, buy-outs and mergers. Google’s role will become even more important, since it works as a mediator for all the aforementioned parties and certainly controls the game - on the one hand, they are the advertisers, but on the flip side, they also want a piece of the pie (frenemies). Lastly, Airbnb is the big unanswered question; will it last as a business model, and, if so, for how long? My prediction is that it will, in fact, adapt to the “new normal”, though ending up with a lower portion of the market share than before the COVID-19 era, despite establishing a highly developed product.

I don’t think that the tour operating model will become completely outdated, but its market shares will shrink and continue to do so over time. They, too, will be modernised, going “full digital” and adopting larger amounts of flexibility. Travel agents will also need to show resilience and enrich their services or else they will find themselves losing more and more of their market share. It’s a one-way street, necessary to their survival. We all experienced the collapse of Thomas Cook, due to inability to embrace the new reality. Digital development, the ability to acclimate and show flexibility are key so that everyone can hold onto their piece of the pie.

Leisure travel is expected to rebound first; the initial steps will be made with domestic car travel,



giving way to aeroplanes, ships and international journeys over time. I predict that this will be the “year of the car” and that many Europeans will choose to visit even our country, either in their cars or their motorhomes and trailers and without limiting their exploration to Northern Greece. Business trips will gradually rebound right after, though there will be fewer than there were in the past, at least in the beginning. The MICE sector will re-emerge later, however not in full force; but, in the meantime, events with up to 50 participants will resurface relatively soon. Large exhibitions (WTM, ITB and more) may gradually reappear starting from next year (and on the condition that the pandemic has been conquered) but not with the same amount of visitors as was seen in previous years. Networking and human contact are

important and cannot be fully replaced by video conferences. Domestic tourism will increase, but I don't think we can expect it to make up for the absence of international visitors. In Greece's non-touristy destinations, such as small islands and the mainland, we may witness some demand this year, as these places will seem particularly attractive amid this era of social distancing.

In domestic tourism, OTA's will no longer have the upper hand this year, since most consumers will favour direct bookings or reservations made by phone.

Hoteliers will have to adapt to these new conditions completely, and lead their companies to the next day of tourism, with all the changes that this entails. Reaping the

benefits of all tourism-related advantages is an important part of this process. A new ecosystem needs to be created, which will be based on a well-balanced portfolio when it comes to distribution channels (so no great dependencies), an increase in direct bookings, added daily value offered to brands and modern ways of communication with audiences.

I consider three things to be vital for the next day of tourism: Adaptability, sustainability and, of course, a digital transformation in preparation for this new era.

The changes which we will witness in the next five years mainly due to artificial intelligence, machine learning and big data will be larger

than those which we experienced in the last fifty years. Those who realise this in time to ride the wave will reap the benefits.

How important is the destination itself? More important than ever. However, this new reality also calls for a new narrative. Every single campaign without a strategy, will never succeed in reaching its objectives. A new narrative which will be the base of the storytelling campaigns to follow. The different ways in which we will be experiencing our surroundings will need to be reflected in an updated representation of our country, in an effort to accelerate the recovery of tourism. A new point of view, based on human values, experiences and sustainability, aimed in a specific path. Apart from sun and sea, this new



narrative will need to showcase gastronomy and wine, culture, modern art, the new Greece as a whole. Its people. Every part of this country has a breathtaking story to tell. Everyday, every month, throughout the year.

Greece is an open country, with open people and open hearts, who know how to welcome travellers from all over the world and offer them truly unique moments. Not only in the summer, but during autumn, winter and spring. It's an open country all year long. You could go skiing, hiking, wine tasting, kite surfing, discover the wild beauty of the Greek mountains, visit museums and art exhibitions, throughout the year and not only in the summer. Even on the same day!

Every corner of this country has a story to tell. I'm pretty sure that every single traveller out there would be interested in hearing these stories, becoming a part of these stories. As wine lovers would say, it's worth exposing our "terroir" and the uniqueness of our land. Amyntaio, Drama, Peloponnese, Kastoria, Epirus, Naoussa and many more intriguing destinations could unveil hidden gems and offer unforgettable experiences to those who "dare" to explore. The aspects which make Greece one of a kind are what will enrich our product, thus differentiating us from our competition. The new narrative should point out that Greece is always open, especially this year and until April of the next, with the need to struggle and seize any opportunity to attract as many travellers as possible, leaving our legacy for the future.

And also for us, the Greek citizens. Let's rejoice in our love for our country and support our local communities; instead of going abroad this year, let's visit all the places we've always had on our bucket lists within our country. Let's "Relove Greece" by also paying a tribute to all the modern heroes out there, inviting them to visit our country for a week for free. Mainly from Europe, where the majority of our visitors come from. And show to the world that we do care. Here in the land where philoxenia was born, we do believe that people come first. The initiative of "Greece welcomes the modern heroes of our times" will spread to the world in mere days.

If we connect the pieces of the puzzle and take on a unified approach and a solid plan, we will enjoy an ultimate competitive advantage. One which will last us the entire year, not just six months. One that will shine through forever; this is what will make our future bright.

Maria Theofanopoulou

GREEK TRAVEL PAGES



Maria Theofanopoulou
CEO
Greek Travel Pages

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**We might see a return
to a more quality form
of travel**

The last few years we have been bystanders to how tourism was rapidly growing. Each year had been a record one with the country running on ‘autopilot mode’ regarding tourism arrivals. We did not have the proper time to set all the rules and develop our sustainable model while, at the same time, much of our strategy was focused around a trouble-free future. We were following the momentum.

The coronavirus pandemic came to rock the boat and set new rules. It exposed the tourism industry’s fragility and the interdependence of our societies. In just a few months, the pandemic overturned our everyday life and set the whole world to a ‘pause mode’. Tourism is among the industries that have been hit harder due to quarantines, travel bans, and social isolation measures. In like manner, in Greece we count greater losses as tourism has been our top economic driver.

It is almost impossible to predict what will happen during the next weeks and it is very difficult to say which changes are here to stay and how much they will affect our lives in the future. Is it a crisis that will reshape how we travel and live? Will it turn out to be more of a ‘pause’

before we return to ‘business as usual’? I believe that we need first to understand the scale of economic distraction the pandemic will leave behind. We can only forecast possibilities, albeit one thing is certain: we will witness a ‘new normal’.

We are going to see a massive disruption, working in both good and bad directions. Every economic crisis brings unprecedented problems and challenges but also unprecedented opportunities that we need to acknowledge and use in order to bring the industry forward. So far we have seen that government reflexes are mainly looking inwards with ultimate objective to protect their own people. EU institutions and leaders have been criticized for not taking sufficient and coordinated measures to deal with this crisis. Significantly, this crisis leads to a new economic division between the North, which seems to be getting stronger out of the crisis, and the South, which has taken a harder hit.

EU’s biggest asset, the single market, is at stake. Each nation is adopting solutions that appears best suited for them, without much consideration of its neighbors or trading partners. With most airplanes of airlines being grounded, depending on



national policies, some airlines will fare better, while others will struggle. The whole airline system is reconstituted. We expect that soon weaker airlines will exit the market, stronger ones will grow their share and low-cost carriers will be 'swallowed' by large carriers. Notably, regional airlines, which often provide essential connectivity to remote regions and support regional airports, will also face extreme risk. Before the crisis, airlines were trying to maximize capacity on airplanes. The new norm will require airlines to do exactly the opposite. In like manner, it is expected that airlines will reduce the number of flights and routes to increase revenue, resulting in reduced travel options, more miscellaneous charges and more expensive flights. At the same time, we should expect to see consolidations in the aviation industry.

In this respect, it is important for governments to coordinate, and states to safeguard measures in order to address unfair competition and market twist. After all, the aviation industry is much more than airlines; it's also about communications and trade. A decrease in air connectivity, in the long run, will hurt tourism and will partly block the economic growth potential of regions. It is expected that the slow recovery of air travel will lead people to travel by using more extensively other means, such as trains, ferries and cars. This opens a window of opportunity for rail and ferry companies to respond to this opportunity by improving their product and services and 'creating' loyal customers that will be 'here to stay'. Destinations are also fronted with new challenges.

Notably, now is a unique opportunity to take a step backwards and press the 'reset button'. It is the best opportunity we have to start envisioning the destinations and the companies operating within as we have always wanted. To reinvent and build more sustainable strategies. To start shifting our perspective about 'who we are' to what community value we bring. We need to bring value that others do not have.

In this respect, all stakeholders: the destinations (DMOs), the locals, the enterprises operating in the destination and the bodies need to agree on who their customers are, which are their channel managers, their air partners and what their experience providers are offering? This crisis is an opportunity to bring together all involved and to agree upon

a vision which should then deploy a wholistic strategy to follow. It is important to be looking not only on the demand side of the equations but also on the supply.

In the throes of the pandemic, technology is transforming faster than we expected for many industries. The hospitality industry is not immune. What we have experienced in the last few months is a welcoming response by companies and its employees and a willingness to go through the learning curve of this technological transformation.

Following the crash test that companies had to take in order to organize their employees to work remotely, it is likely that more flexibility around working hours and workplaces will be established and thus more people will continue to work virtually. There will be no distance restriction due to work. If you can work from anywhere, then why not work and travel simultaneously?

On the opposite side of the equation, as telecommuting has become a new normal amid the pandemic, business travel as we know it might become an unnecessary cost for most businesses.

Behaviors are also changing. It is possible that people will reconsider the purpose of their travel, their options and the duration. We might start seeing people taking fewer, but longer, trips. We might see a return to a more quality form of travel.

All things considered, we must not rely on past success. We cannot know all the parameters leading to the next day, but we should be able to adapt to every path they will make. Now is the time to make big changes.



A decrease in air connectivity, in the long run, will hurt tourism

Lia Zampetoglou

INSETE



Lia Zampetoglou
Director of Learning and Development
INSETE



**Why Greek Tourism
will rise like
a Phoenix**

I do not know the future of global economy. I cannot even begin to imagine the fate of international travel, airlines, tour operators, hotel chains. I am not even able to say for certain if season 2020 will be a complete loss for Greek and international tourism. Seems like it? Maybe. Do I know? No, no one knows. I've read what you've read, I've heard what you've heard, maybe I have talked to more people than you have, but that didn't help, as they are as puzzled as I am.

So, I must confess that my crystal ball is well and truly out of order! Just like it was on that rainy Sunday at the end of June 2015, when I stood for 3 hours in a queue at the bank with 100 other people, waiting to get some cash, lost and scared, believing the world as we knew had ended. But it did not. A few months later we had learned how to live with capital controls, how to do business, how to organise ourselves and our obligations based on it and then, a few years later they were gone. So, I might not know a lot of things, but I do know a few. I know that human nature is programmed in a way that it resents change on one hand but has a built-in mechanism to embrace it and manage it on the other. I know that this is a historic era and we need to make sure that

we come out of it alive and kicking, because there are far too many new horizons to conquer. I know that Greek Tourism will be wounded, however in a few years from now, these wounds will also become a memory and our industry has the maturity and the capacity to absorb the changes and thrive. And you know how I know it? Because for the past 5 years, I have watched the "engine", of this industry, its people, grow, learn and excel in ways they haven't in decades. I've observed them become smarter, more knowledgeable, savvy, trusted and trustworthy. When did we go from trying so eagerly not to become "The waiters of Europe", to small tourism business owners who are not only passionate about what they do, but dive into subjects like strategy, indigenous guest experiences, and loyalty, and young adults who decide that tourism is their dream career? I was blessed to see -and keep seeing- the shift from easy profit and quick fixes to authentic hospitality and developing our people. Don't take me wrong, it's an on-going process and we still have a long way to go, but it's definitely happening. If you pay close attention to the people, you will be able to see it for yourself. In the next generations of business owners, father and daughter attending training courses together, in the immaculately groomed, young,



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Greek Tourism will be wounded, however in a few years from now, these wounds will also become a memory and our industry has the maturity and the capacity to absorb the changes and thrive

college student who wants to be a waiter, because he knows that that's the best way to become a GM in the future, in the brilliant entrepreneurs and start-uppers, who pop up with intelligent ideas aiming to conquer the world.

I wasn't paying attention myself. Being an insider for 20 years does alter your perception. Moving from working in Hotels and into INSETE changed my point of view. Actually, it altered it completely, to a degree that I couldn't see clearly at first. Then we started touring Greece with seminars. People were sceptical at first, and then slowly but gradually they started realising "Oh, I need to be up front, I need to make a difference, I need to fight the competition", and they joined the cause. Then School of Tourism OnTour came along and destinations shifted in my eyes. It was no longer just another island or just another city. Those places were alive, they had a vibe, they had challenges and blessings, they had people whose hearts were beating to one tune "We want to be better; we want to make it right!". Then, a couple of weeks ago, when we entered a scary lock down, with life threatening conditions, and we launched The INSETE Webinar Series, they were there again. They rushed to learn, to keep up, to stay active, to become better, to stay competitive, apply new knowledge, develop their businesses, stay updated. They are the reason we will make it. Because they are scared and disoriented but somehow, manage to find their True North. They are hurt but, now they know how to take care of their injuries, they use tools and technology, have the ability to shift their products and services to match the new guest needs, and they can exercise empathy to become one with their future guests. They are full of questions, but now they are not afraid to ask for answers, they look for the experts and they no longer worry this it might hurt their ego. And finally, they no longer travel alone. They've got others with them, they have realised the magic of companionship, synergies, togetherness and now whole destinations travel in packs.

No matter what happens, even if I trust no one, I trust them. And because they trust us, we will keep going, a never-ending circle of give and take, a never-ending belief we will make it and Rise like a Phoenix. TILL THEN #KeepLearning & #StaySafe

Hospitality Clairvoyance

01.

Kalia Konstantinidou

KANAVA SA

02.

Stamatis Hatzilazarou

H HOTELS COLLECTION

03.

Antonios Karatzis

NANA HOTELS

04.

Fotis Kokotos

ELOUNDA S.A. HOTELS & RESORTS

05.

Konstantinos Alexopoulos

DOMOTEL HOTELS & RESORTS

Kalia Konstantinidou

KANAVA SA



Kalia Konstantinidou
Owner & Vice President
Kanava SA



**Travel reminds us of all
the things that we share**

The challenge we are currently encountering has made us look deep into the reality of our world, being a global community with linked demand and supply systems, which results to almost all industries being affected by the pandemic.

The travel industry is one of the greatest catalysts for this interconnected global system. Travel is a far greater mechanism for the dispersal of wealth to local economies than has previously been recognized.

We tend to be reticent making predictions when it is clear that we are all sailing in uncharted waters and in some cases trying to control things that are not really in our control. The best we can do in these cases is count on our instincts, be as charitable as possible, and very importantly, be respectful of everyone. Try to prepare ourselves for the next day in travel, when one thing we know for sure is that nothing will be the same, but also that now, more than ever, people will need to connect, to engage with communities, to be mindful and to travel for a purpose.

But what is really going to happen and where do we stand now? The future is already here as we witness the emergence of new concepts,

services, and approaches. We are experiencing a unique situation of dealing with a crisis, recession and recovery all at the same time.

Unprecedented events require an unprecedented response and a change of mindset. The moment we accept this, we will feel liberated. The starting point is that everything has changed. No industry, and even more tourism, shall try to revert back to what it has been regularly practicing, before taking a pause and ask if it makes sense in this new normal. Everyone needs to evaluate and make decisions in a different way.

Travel reminds us of all the things that we share, most notably our humanity and our planet. Sustainable travel as an industry is growing around this reality, and the “business as usual” mentality around the products and practices we use is changing. While the planet has been incredibly resilient for billions of years, it is uncanny how vulnerable we are on this earth that has a vastly growing population, and one that is so interconnected. If global citizens see the positive impact on a planet wracked by the effects of climate change, and when borders do reopen, a more mindful approach to travel will likely be top of mind: fewer trips, longer trips, more meaningful trips.



Mystique, a Luxury Collection Hotel

At this stage, it is more clear than ever that we must prepare ourselves to welcome the New Global Explorer (NGE) and evaluate new technologies, innovations and disruptions that will build his trust, keeping in mind that the meaning of “high-end” or “jet set” travel will not be defined by materialism and underlying desires, rather by experiences and collective interests. NGE will seek for a journey made of personal spaces and disinfecting regimen, but also fueled by word of mouth, as he will prioritize on supporting local communities. He will not perceive himself as a consumer, but he will travel to contribute towards several purposes and assist people to progress. He will not trust easily and as a result, hospitality brands will need to redefine themselves showing transparency and realism. He will

embrace conscious tourism, powered by localization and he will step away from peak travel, constantly seeking for culture and collective mindsets and heading to destinations that call for new and innovative solutions to support the environment and the development of sustainable tourism experiences, products and services.

The tourism industry will need to adopt and transform in order to serve for the NGE, and prioritize on the frontier of tech safety and confidence over other aspects for a seamless journey. The revival of travel will bring electronic passports, medical screening and innovative cleaners in order to protect travelers from a physical contact. Hotels, airlines, and especially cruises will have to



Istoría, a Member of Design Hotels

determine how to give travelers personal spaces they feel they can control. It is a common hope that the pandemic will serve as a wakeup call for the travel industry to work together and for governments to effectively collaborate with the private sector. NGE will be much more cautious on health insurance, he will absorb travel policies and follow the WHO guidelines as he plots his travels and will definitely be more appreciative to the times that he was traveling freely and safely. Being a mindful globetrotter will be the equivalent of being a VIP Jetsetter in the Pre Pandemic days.

This is a time for all of us to start looking again into the essence of things. We can create a better world for tourism, one



At this stage, it is more clear than ever that we must prepare ourselves to welcome the New Global Explorer (NGE) and evaluate new technologies, innovations and disruptions that will build his trust

that listens to its communities better than any other industry in the world. That’s the opportunity we have right now, so let’s take make the best out of it and create something very special out of this crisis. It is important to take the time that is needed to make sure that whatever emerges from this is fit for purpose - not just for dealing with a very unique situation - that builds resilience into the shape of the sector in the longer term. The world will not be the same after this, but it relies on us to make it a sustainable, sincere, hospitable and purposeful place for us and the future generations to live in.

It lies with us not to dive in a great recession but instead insist on creating awareness for a better kind of travel!

Stamatis Hatzilazarou

H HOTELS COLLECTION



Stamatis Hatzilazarou
Board Member | Sales Director
H Hotels Collection



Hotels will need to invest a lot in their brand awareness

Going back three months ago, no one would have thought that in the next days, weeks, months, we would experience such an unprecedented situation. Global economy has come to a halt, markets have seen some of their biggest drops in history, oil prices have plummeted to, first time in history, lows, whole countries have been in total or partial lockdown, schools have closed and life as we knew it, simply stopped.

It takes time to “digest” such radical changes; even more time is needed to adapt our body, mind and soul to the present but most importantly to the future that lies ahead, be it short, medium or long term. And while every human being is currently trying to cope with the above situation, as an existence on this planet, businesses need to adapt as well. Humans and businesses are interconnected though and depended on each other, so, the faster humans understand what is going on and manage to adapt, the sooner they will manage to prepare and organize their new “business as usual”.

Tourism is not the only one but certainly one of the sectors most badly hit by the spread of the corona virus. Thousands of hotels

have been closed, almost two-thirds of the world’s 26,000 aircrafts have been grounded and approximately 25 million people working in the tourism sector are currently either unemployed or partially employed but definitely uncertain about their future in this sector. **IATA has warned that carriers face a \$314 billion shortfall in ticket sales this year, and half of them face bankruptcy in two to three months without government help***

The financial damage that this sector is still experiencing, could only be compared to a soldier very badly wounded who undoubtedly will not survive without any help. But this soldier needs to be rescued, receive any help possible until he stands on his feet and then he must be given instructions on how to fight in the new battlefield and of course he must be given the proper weapons in order to do so successfully. His experience before and after the incident will prepare him for the next battle.

But let’s assume this soldier has been rescued somehow and he is back on his feet and on his duties. He is definitely carrying his scars which remind him of what happened and will always be present in every decision he makes. Let’s see how tourism will manage to cope in the medium and long term.



Princess Andriana Resort | Spa

First of all, we need to stress that normality will not exist as we knew it until before the pandemic appeared; at least not before a proper vaccine or treatment is available to every human being on this planet and this, according to the medical experts' opinion, is not expected to happen before the second half of year 2021. But still, after the vaccine is there, people will need some time until they forget and return back to old habits. For the purpose of this article let's assume that life is back to normal, everyone is vaccinated and the danger named covid19 belongs to the past.

Challenges

First thing we need to expect is a series of measures that will ensure better hygiene procedures everywhere, from airports and

aircrafts, to means of transport and hotels. This will logically lead to higher operational costs and a greater need for qualified and trained staff. Our estimation is that the tourism sector in the medium term will face a big shortage of staff who will probably try to change profession under the pressure of uncertainty which they now experience. In the long run the numbers will increase, as also the salaries should increase due to supply and demand dynamics.

Hotels will need to create and organize or reorganize and upgrade their own training departments, in order to properly train new staff and keep their current staff updated according to the new measures imposed. More staff will be needed in order to cope with the upgraded hygiene standards.



Mayia Exclusive Resort | Spa Entrance

Hotels might need to change their product in the medium term; MICE for example will take longer to recover as the ban of people gathering in closed rooms will continue. So, hotels whose main business was focused in this market will need to seek for other markets. Tourism businesses will need to control their financial situation very well, as this will be a choppy ride for at least 2 to 3 years. New Investments will probably stop for a while and give more space to M&As, as companies already focus on keeping as much cash as possible and this seems to be their strategy for the next few years at least. New technology will certainly be introduced in the business of tourism at a much faster pace than expected. More and more things will be done remotely and most of them will be available

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New technology
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to everyone's smart phone. Fast online check-in, and check-out, faster and more technologically advanced security checks, high tech cameras controlling people's temperature, movements, gatherings in public areas are only some of the developments that will take place in a matter of months. And hotels will also need to adapt to this very fast. Hotels might also need to change their way of operation if the buffets for example are banned from their restaurants. More staff to cope with the need to serve guests on their table, more staff in the housekeeping department to cope with the high standards of cleaning and disinfecting the rooms are only the beginning of a series of changes to take place. Taking into account current trends concerning the climate, the food industry, the high rise in



Boutique 5 Hotel | Spa Pool

the number of people having allergies, the global production of food and the probably new client mix, our estimation is that hotels in particular will change the way they produce and offer food to their guests. More personalized services will take place and the one who does it better, he will get his market share for sure.

In relation to the above, more, greener policies, adapted and executed by hotels is a current trend and no one doubts that this will be the future. Climate will be our number one subject of discussion and concern globally and hotels will definitely not escape from this. They will need to reduce their footprint to the lowest level possible.

Business Survival

Quite some number of M&As will take place in

the global market of tourism as well as many companies will seize their operations due to the damage done during the pandemic and due to the higher operational costs incurred after that. Businesses that will make it through this situation will have done so, probably with the help of a loan, so they will have to face a future with increased costs until these loans are paid in full. Some of them will “bend” under the pressure of loans and hoteliers for example will probably prefer to sell their properties to big hotel chains. This means that the market will change in the medium term and financially healthier group of hotels will emerge stronger after this crisis.

Travel Dynamics

The first people expected to travel will be of

lower average age but in the long run, everyone will get back to travelling again.

Slow pace of bookings is expected in the medium term, even with attractive offers by hoteliers, airline companies and Tour operators but this will slowly start to change and the financial losses will be replaced by profits not long after people start to feel safe and companies manage to increase their prices accordingly.

The average length of stay is expected to increase in the medium term as people will prefer to travel less (reducing the risk of contamination during the trip) but stay longer in the destination. We are not sure if this will change soon but if technology in transportation in the next decade manages to evolve at the level that the time of travelling is reduced to 1/3 or even more (according to experts’ estimations), then people will be traveling much more often but stay for shorter period of time at a destination.

Destination brands at the moment and in the future will be more important than hotel brands in the short and medium term. A destination’s brand however will keep playing a very important role in the tourism development of any region. People will prefer to travel to destinations where they feel safe and where there is proper infrastructure. The marketing and promotion of the destination will be of crucial importance as the competition will be fierce.

A huge campaign focusing on gaining the trust of the travelers will need to start immediately and keep investing in this for at least 2 to 3 years, until people really trust that they will not be in danger while traveling.

Hotels will need to invest a lot in their brand awareness and their sales and marketing departments will need to adapt to new trends of attracting guests and increase their sales.

Online sales will probably increase in the medium and long run, but this will greatly depend on how safely the airline industry will get out of this pandemic. If the global number of airplanes provided by independent companies is reduced

a lot due to bankruptcies and the supply of seats is not enough, then the tour operators will be the big winners. If, however, the opposite happens and Tour Operators are the ones who do not survive the pandemic, then more people will need to learn on how to book their holidays online, with or without the help of a travel agent.

All of the above might sound catastrophic to some ears; Tourism however has been present for a long time and being one of the most sensitive sectors, it has learned how to adapt to changes. Let’s not forget that tourism is changing and reshaping constantly. In the eyes of the experts, this is another evolution of the sector. When this battle is over and the next one comes, everything will be just a memory, and tourism will still be there. People are not going to stop traveling. On the contrary, global traveling is expected to increase in the future. Companies will need to keep evolving and adapting to new realities; they will keep facing small or big crises, maybe even more frequently but they will be there.

Last but not least, when I am in trouble, I like to say that every obstacle comes for a good reason. Big events lead to big changes. Tourism is no exception.

*Information from The Bloomberg magazine. How Coronavirus Will Forever Change Airlines and the Way We Fly <https://www.bloomberg.com/news/features/2020-04-24/coronavirus-travel-covid-19-will-change-airlines-and-how-we-fly>



Destination brands at the moment and in the future will be more important than hotel brands in the short and medium term

Antonios Karatzis

NANA HOTELS



Antonios Karatzis
President and Managing Director
of Karatzis S.A.
NANA HOTELS



Creating a safe and private environment for the guests of tomorrow

The next year will find the world of hospitality completely altered in certain key aspects, which are associated with consumer behaviours as well as the restrictions which will be present, transforming various deeply ingrained tourism habits.

More specifically, the current situation will affect various groups in different ways; people will come to revise the ways in which they travel and what a “vacation” means to them.

· For middle and upper-income families, the post-lockdown crisis will mean reduced expenditure on luxuries, with tourism taking a big hit. Disposable income will be reduced by significant amounts for many due to the recession that is expected. Many households will also increase their savings, following the widespread feeling of caution which is a given after the unsettling events which took place. These general truths will lead demand for hospitality services to decrease as people choose more economical ways in which to spend their time on holiday. Families are expected to become more selective when choosing their vacation destination, preferring hotels which offer a wide range of private amenities.

· For high-net-worth individuals, the wish for seclusion is now going to ring truer than ever. If the past decades found them in search for unique experiences in obscure destinations around the globe, the following years their preferences will shift, causing them to favour the complete privacy offered by renting a mansion or yacht over exploring unknown territory. Resorts with luxury villas and bungalows will be the name of the game, and those offering privé beaches are expected to be among the most popular. High-end in-room amenities such as private chefs or exclusive spa services will become prime selling points.

· The age group of 70+ is expected to minimise tourism of all categories for a significant time period. Since they are considered to be among the most vulnerable and already had a tendency to avoid risk even before the pandemic, travel which they engage in is expected to be limited to the absolutely necessary. Especially considering their preference for cruises, a sector which is being hit because it does not offer the privacy which is now a necessary part of every vacation, it is apparent that elders will be skipping their summer holidays for the time being.



Nana Golden Beach



Nana Princess



Privacy has always been an important factor for each stay, even before the events which are now shaping the tomorrow of tourism in Greece and the entire world. However, this situation has made it a completely defining feature, which can “make or break” the potential of each hospitality experience. Creating an air of seclusion is ideal for putting guests at ease at this time, as is due diligence when it comes to adhering to all new safety instructions set into place by health authorities.

Following all necessary guidelines is key for minimising the risk factor of each stay and helping visitors to feel completely secure. Additional time and resources are expected to be allocated by hotel brands to the consistent re-training of their teams. To increase the comfort of guests and associates, the changes which will be implemented must be subtle, and yet noticeable; not made to dominate the experience, but, rather, imbue it with an additional feeling of security.

Generally speaking, we expect some of the services offered by the world of hospitality to be altered; al fresco dining is going to be more popular than ever, as will outdoor fitness programmes. Domestic tourism in general will increase worldwide, with people preferring to stay “close to home” as a precaution; international visitors to Greece will hail mainly from European countries, as opposed to the USA in the short term (around 12 months). As spending power will be limited due to the crisis, it is time for the hospitality industry to show flexibility; standing together will help us face the tomorrow of tourism well-prepared.

Though tourism is facing some great challenges at the moment, now is the time for careful planning and original thinking to shine through. Hospitality leaders have found success despite diversity in the past, and will do so again; this is when the diligence shown in the past years will make its mark.

Fotis Kokotos

ELOUNDA S.A.
HOTELS & RESORTS



Fotis Kokotos
Member of the Board,
Development Director
Elounda S.A. Hotels & Resorts

The growth of travel over the past 15 years was based on the ease of mass transport, and specifically air travel. It is inescapable to note that this came in the years after 9/11, a time when the airline sector seemed to be heading for a major contraction. The accessibility of flights to enormous swathes of the global population, primarily, and the growth of other sectors (like cruises) secondarily, allowed countries to invest heavily in new airports and ports, further boosting the connectivity of their tourism product.

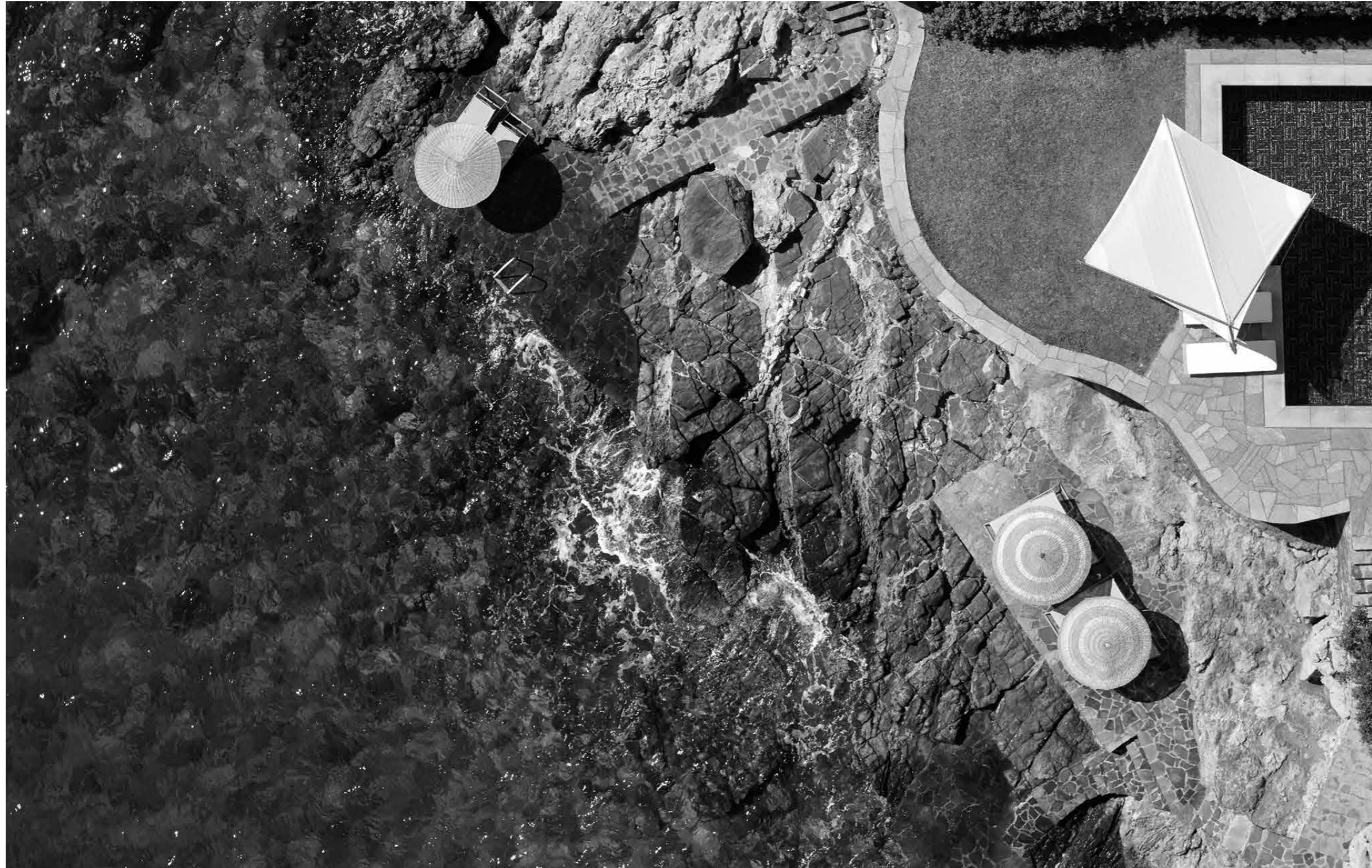
Countries like Greece have also benefited from this trend, to the point where over-tourism at certain popular destinations recently became a hot topic of discussion: Athens, Mykonos, and Santorini being the three prime examples, with the latter ostensibly burdened most by the phenomenon. Over-tourism manifested itself in a variety of ways, the most prominent ones being the traffic, the lack of affordable housing, and the crowds at all the popular sites.

Enter the era of social distancing, heralded by the spread of infectious diseases like SARS-CoV-2, which we know to be only one of many such

potential pandemics. At first, it seems to forcefully solve the “over-tourism” issue, doesn’t it? This is clear for small island destinations, where health infrastructure could not possibly ever cope with any outbreak, but is also the case for city destinations that thrive on the very concept of being crowded and busy, whether that be the Acropolis in Athens, San Marco in Venice, or Piccadilly in London.

Furthermore, besides the destinations themselves, the need for social distancing also impacts the kind of vacation sought, or whether it is even available. Thus, the mass-tourism sector will be impacted more than other types of vacation, some of which might actually grow their share: holiday homes (from small houses to large villas), yachting (from bare-boats to super-yachts), and outdoor activities (hiking, cycling, golf, etc.) being three good examples.

On the other hand, we must also bear in mind that the transition to more environmentally-efficient activities remains a dominant (and indeed necessary) trend for global tourism, and the economy as a whole. In this light, mass tourism has actually been a greener alternative to villas, yachting, and pretty much anything that



Elounda Peninsula All Suite Hotel - Royal Suite



The transition to more environmentally-efficient activities remains a dominant trend for global tourism

is individualistic. Economies of scale in mass tourism have also meant that destinations could reduce their average GHG emissions and production of waste per overnight stay.

Therefore, a further challenge now for the entire industry is to find ways of further improving the environmental performance of holiday-home vacations, yachts, and all sorts of outdoor activities that do not take place through large organized groups and efficient modes of mass transport. As a matter of fact, such activities had always been considered as the Holy Grail of a savvy destination, the epitome of global success and the trademark of world-leading luxury brands like Switzerland's Gstaad, Italy's Porto Cervo, or Greece's Elounda.

Growing the segments of the industry that address the need for social distancing by their very nature, will allow us to attract these segments of the global tourism market that could potentially thrive despite the overall slump, given that the availability of mass tourism will necessarily be curtailed. Destinations that have the potential to showcase such formerly "niche" products, and to grow them relatively quickly so as to meet the demand, will mitigate their losses.

Furthermore, wherever possible, mass tourism must overhaul its modus operandi to protect public health vis-à-vis the spread of infectious diseases. The protocols for achieving this are still a work-in-progress, but we expect European-wide action to be taken within the month of May, so as to establish them for the upcoming summer season. It will then be a race against time to prepare destinations accordingly: shore up public health infrastructure, plan and execute the publicity, re-route the demand through the agents and operators, develop the product, and execute whatever certifications are mandated.

Clearly the challenges ahead are numerous and the goals might be even too lofty to reasonably attain. Yet, we must attempt them. And we surely will. Because true entrepreneurs see opportunities even in what seems to be a dire predicament. That is the nature of a leader.

Konstantinos Alexopoulos

DOMOTEL HOTELS & RESORTS



Konstantinos Alexopoulos
CEO
Domotel Hotels & Resorts



The Seesaw

The current pandemic has pushed people, organizations and governments to unknown limits and territories. The health factor is undoubtable the top priority for all stakeholders and this has been brought forward to the conscious broader and higher than ever. Even the perception of what safety means has shifted. What once was taken for granted has now become the driver for almost all decisions. Along that way sacrifices are made. Some of those will have long lasting effects that will further define our lives in the future and will most probably change the social, political and the economy's structure.

These effects and their evolution will dramatically affect the public and the private ability and means to provide the "not-so-granted" anymore health and safety of the people. The health of the community and the Economy have been put on the seesaw and the balance is in quest. In the very near future we will find them on the same side, either both rising or both diving.

After the first phase of the COVID era, the current phase, the recession that will hit the global

economy is one of a size that has never challenged us before. It is widely acknowledged that transportation and tourism are those that are already suffering the greatest losses. The season 2020 is already considered as lost. Even now, as these words are put in paper, none of the key players of the distribution are able to plan and organize their business. Restrictions in all markets, in the borders and in the destinations themselves do not allow for the leisure segment to initiate a restart. However, a kick-off even for a much shorter period is vital for the travel industry and staid players are going to support this at any cost, otherwise the season 2021 will be further jeopardized too. For this to happen, it is absolutely necessary to have a structured framework at least in the EU and the sector's restart to be part of an organized intra-countries plan. The appetite to travel is there. How the health factor is addressed is critical, both for the consumers' trust and for the actual safety of visitors and of local communities.

Assuming that, one way or another, we go through this season and most of the players are in place or others have taken the place of some, I would expect 2021 to be a year of adequate recovery in the leisure sector, subject to



Domotel Agios Nikolaos Suites Resort



The appetite to travel is there. How the health factor is addressed is critical, both for the consumers' trust and for the actual safety of visitors and of local communities

the depth and the quality of the recession in the source markets. The disruption in the distribution will definitely further handicap an accelerated growth of travel. Changes that were already noticed and developing in the industry will be faster forwarded. New products, players, channels, technologies and habits will arise but most likely in a fragmented way in the beginning. Safety, as always will be key, but considered differently than before. In time, the authentic experiences and locality in a sustainable and human approach are going to win over squandering time. However, the economies of scale and the lower capacity to spend will slow down some of this evolution.

Most people would expect or hope for 2022 or 2023 to bring us back to the past and the levels of 2019. We should consider that most probably the greatest challenge lies ahead and is to be evident at that time. The former -a decade long- recession, the drained liquidity and the new crisis and following recession will create a paradox. As demand grows the existing businesses that made it through this turbulent time will be struggling to follow. An increased number of properties getting outdated versus keeping up with the trends will be the outcome of the lack of investments. Furthermore, the valuations in the sector will drop significantly as the markets will raise the factor of the tourism volatility in all models making new investments almost unattractive.

How the governments and the EU are going to deal with the broader and specific issues will be the gamechanger. Unfortunately, the inability to agree on almost any issue and to act leaves no great room for wild optimism. However, the tourism sector, directly and indirectly, accounts for almost 30% in my country's GDP, while in the EU for around 10%. Supporting the businesses that employ the 9,7% of the EU labor force this period will be crucial for a rebound and a sustainable future. The stake is high and as SETE and the respective confederations of Germany, Spain and Italy stated in the recent letter addressed to the EU Tourism Committee, "Tourism and Travel represent the essence of the European idea, the right and freedom to travel."

Advise from the field

01.

Xenophon Petropoulos

HORWATH HTL GREECE

02.

George Kyvernitis

KYVERNITIS TRAVEL COMPANIES

03.

Thanh Luu

REVINATE

04.

Stella Tsantila

INcrementUM

Xenophon Petropoulos

HORWATH HTL GREECE



Xenophon Petropoulos
Country Director
Horwath HTL Greece



**Never Look back,
unless you are planning
to go that way**

David Thoreau, Philosopher 1817 - 1862

About 20 years ago, humanity observed a big change. Families and individuals started spending more on travel and experiences than they spent on household goods. Gradually, the traveling industry became a huge contributor to global GDP. And then Covid-19 stopped everything.

Monday 9th March 2020. That was the date I took the decision to work from home and distance myself to protect my family. Today, almost two months later, full of zoom meetings with clients, colleagues and friends, I find myself thinking that this is a trust related crisis that will eventually become a fundamental milestone to change.

Covid-19 pandemic and aftermath, is completely shifting our attitude towards human & business priorities, health, moving and travelling, socializing and experiencing. What is positive about this crisis is that for the first time travel and tourism has been named specifically as an industry that is vital in any functioning economy and in fact many countries derive a considerable amount, if not the majority, of their GDP from travel and tourism related activities.

So, change is the only constant on which the tourism industry can rely for the After Covid-19 era. And it must consider it with a positive attitude. Changes made voluntarily yield a better, faster and easier result. The trigger for this change will not be competition. It will be the common effort to restructure the industry in order to survive.

In a marketplace where no one is too big to fail, decisions will need to be taken quickly to protect assets, values, destinations and products and making sure the industry is in good shape to take advantage of the inevitable rebound.

Destinations will need to design from scratch their products, their operating procedures, their provided experiences, their positioning, their identity and message to prove their trustworthiness to travelers and local communities. Hotels and resorts will need to act immediately on their operational plan, their SOPs, their budget, their peoples' training needs. We all realize how fragile the short-term period looks like. But when the dust is down, we will need to realize and adopt to the new reality.



The “New Luxury” in hospitality

When the industry starts operating again, travelers will be seeking a more transformative and soul enriching experience. The emotional impact on guests, therefore, needs to be a strategic focus. The strength of emotional touch points is in direct relation to brand engagement.

Luxury hospitality is traditionally known as a human-centric, and we believe it will always stay human-centric. However, in today’s new environment we need to be aware of one significant difference: it must have a transformational impact on the individual.

We have defined ‘New Luxury in Hospitality’ through five perspectives needed for a transformational impact:

Purpose:

Travelers will be in pursuit of a better, more fulfilled - lifestyle, increasingly turning their backs on spending on superficial brand experiences. Brands must address (in business terms) - Maslow’s ‘Self-Actualization’ as a business strategy. Visionary brands recognize that society is in the midst of a major paradigm shift which is not a trend; it is evolution.

Personalization:

Brands should develop a genuine interest in the guest’s lifestyle to create an understanding of preferences. Only with this understanding is personalization possible, thus as a consequence must have the potential to evoke feelings of appreciation and surprise. This is the

opportunity to develop an intimacy with the guest and as a result, generate trust.

Experiential:

This perspective pushes us to rethink guest experience and take it to the next level by focusing on the emotional value and the potential to transform ‘me’. The evolved mindset of travelers will include the search of lifestyle solutions while travelling. This shift concentrates increasingly on experiences that address the physical, mental, spiritual and emotional needs.

Balanced Disconnection:

The opportunity lies in focusing on an approach to balance between digitally intensive and digitally aversive experiences.

Ironically, technology can serve as an enabler for a personalized and seamless experience leading to a transformational impact.

Seamless Journey:

Impeccable service has always been the core of the luxury hospitality, and today new methods and technologies support delivery of the service. This increased complexity requires detailed planning including scenario planning approaches.

As always, those who are rethinking, planning and implementing and fundamentally changing, will be the winners. The others will have to think of good excuses.

George Kyvernitis

KYVERNITIS TRAVEL COMPANIES



George Kyvernitis
Managing Partner
Kyvernitis Travel Companies



I am confident that Greece will be on the forefront of this recovery as we have gained peoples' confidence & our brand has become strong again

Some say that the current pandemic will trigger radical changes across multiple sectors; do you see this happening in hospitality? If yes, in which way?

It's been almost 4 months now that the world has come to a pause and that is the most radical change of all. It is hard to imagine that currently there are only 24,000 commercial flights per week, approximately ¼ of what it used to be in January of 2020, streets are carless and major touristic attractions and urban cities, once packed with tourists, feel practically empty and deserted. This has certainly given us a different perspective of the "next day". It would be very naive to even think that the evolvement of life will pause too and that in two years down the road we would come back to what we call today normality.

Things will move, things will change, and we need to be in the forefront of this change as we have been in the past through our stances, our families, but also our companies. This so called "next day" would come to the hospitality industry as well, and we will be speaking for a new norm in our businesses, our countries, our lives. People will still have

the desire to travel, explore and discover but the experience will be different, and how this experience will be shaped, it is in our hands to make as human and alive as possible. Today we see individual data sharing only through our emails, meal plans (allergies), seat preferences etc. and people are quite hesitant in sharing this personal information. Tomorrow, our needs, our habits and possibly some form of a medical record, would be an extension of our ID that would need to be shared to prepare us for the unimaginable journey without horizons.

We will actually put a meaning next to the word "Personalization", that we often hear from so many companies and that will create a new norm.

Which are the two most important disruptions that you expect to take place in the hospitality industry in the years to come due to the current crisis?

In times like these, it is too early to make predictions on the disruptive businesses, technologies and future needs of the industry. Travel will be different, other destinations, other security measures, one global health passport, touchless luggage handling and technologies such



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**Inquisitiveness,
 escape, exploration
 is part of people’s
 nature and will always
 drive the tourism
 industry forward**”

as VR and augmented reality will be part of the traveler’s experience, prior, at and after the journey. Localization will be reinforced therefore limiting the traveling boundaries to sometimes even zero when technology will be able to substitute the human touch and interaction especially to business traveling related to conferences, meetings will be an important aspect of that change. However, holding a crystal bowl these decisions for the future of our country is not the optimum solution instead, we should be agreeing on clear specifications for domestic travel and for traveling within Europe and the EU. The tourism industry is called upon to provide solutions to a number of questions and within these critical questions, lies the solution to the future of hospitality and the tourism industry.

At which pace do you expect travel to make its recovery? Do you expect a quick (V shaped) rebound or something different?
 The recovery is depended on the measures and the level of confidence of each country. Greece has performed tremendously at PHASE 1 against COVID-19, it is now an opportunity to prepare our country and our businesses for the “next day”. However, the effect of the virus on each nation has been quite different and many countries are still struggling to overcome this vast threat. Measures have not been neutralized and still fight to control their curve of Covid-19 cases. Greece on the other hand, is highly depended on inbound tourism out of the UK, France, Germany and the United States and until they open their borders for travel, we will be depended on domestic tourism.

Unfortunately, this might not be enough to provide us with the support it requires to maintain a V-shaped curve towards recovery, but I am confident that although the recovery depends on a very complex, international and interdependent set of elements, we will be on the forefront of this recovery as we have gained peoples’ confidence and our brand has become strong again.

What are the key human behavior patterns that will drive change in travel from 2021 onwards?
 Human behaviors are part of each nations culture, it is not something that can be easily lost, forgotten or changed. WWI, WWII, the Economic Crash of 1930’s, Cold wars, and many more events have taken place around the world

and temporarily affected people’s behaviors, and morals But the DNA, the values and roots of each civilization remains untouched and this is what makes this world a beautiful place. The variety of personalities, norms and behavior makes each destination ideal and memorable. Will tourism be done differently? I think yes, will life become more urban and people would look even harder for these hidden gems until global confidence is restored, definitely.

The uniqueness of this virus for travelers, is that other people or places may carry an invisible threat. The short term behavior pattern changes are clear. Travelers will place their confidence to travel to “safe” places higher and as a result this may change the nature of what we perceive as luxury products &



services, personal space, being in a crowd, homemade cooking etc. Travelers will need to see the safety measures hospitality providers are taking against the virus. Medium-term travel is expected to be closer to home initially and we foresee an increase in domestic alternative tourism.

There are also many indications that travelers will feel more comfortable staying in someone's home or renting a villa and choosing homemade cooking vs delivery or visiting a restaurant. It is important to note that short-term adjustments in behavior can have long term effects. On the positive side, the travel industry is resilient and will jump back fairly quickly and there is always going to be a segment of the population that is more willing to get on a plane and go overseas. Inquisitiveness, escape, exploration is part of people's nature and will always drive the tourism industry forward.

Thanh Luu

REVINATE



Thanh Luu
Director of Sales - EMEA
Revinate



Why leaders and Hotel Owners should take a Gemba Walk

The impact of Coronavirus has been indiscriminate to species, climate, countries and industries. The economic pain on the hospitality industry is incalculable simply because we do not know when the end will be. Some countries have started to slowly relax quarantine measures and invigorate their economy, with the Greek government allowing year-round hotels to open their doors from the 1st of June.

For hospitality executives, there are no modern-day examples to reference from on how to cut across the noise of thousands of hotel 'openings' across Greece. Competitors sets have changed, not only do you need to differentiate your 5* brand from similar brands/products but your competition may now also include that 4* and 3* down the road that was never on your radar pre-Covid.

Leadership in the face of this new adversity will require a business Darwinism mentality. In your new reality, you have laid off or furloughed talent from all functional departments to reduce operating costs. How will you lead your skeleton team to re-engage with your most profitable segments quickly and with a compelling

offering? All those 2020 well-planned strategies, budgets and workforce have been 'Covidified' so you cannot revert to the old 'normal' ways of working.

The term "Gemba" comes from Japanese, and it means "the real place". Quite simply, for hotels, the "Gemba" is your guest touchpoints. Based on Lean Management principles developed by Taiichi Ohno, it is an opportunity for leaders to go back to the front lines to observe actual work processes, engage with employees to gain knowledge and explore opportunities for improvement. Why is this important now more than ever?

Remember the times when your RM manager complained about the sales teams were offering ridiculous discounts that were eroding rates? Or when GM's requested more budget because they did not have the human resources to deliver your Guest Experience vision? Well, guess what, all these problems have now become yours and the few team members left in the business—multiplied those challenges of running a normal operation with the fact that you have fewer resources to deploy what will essentially be 'hotel opening'



Leadership in the face of this new adversity will require a business Darwinism mentality

scenario. In my opinion, this should be seen as a clean slate to re-think and re-imagine your future. From experience, the best learnings are from spending time with each area of your business to find the root causes of friction. Now is the time to gain more control and visibility of your organizational set-up to prepare for recovery.

KEY FOCUS AREAS:

•Re-evaluate your tech stack.

Try out various workflows yourself as an employee or as a guest on your different front end and backend platforms. If you find it complicated to deliver and complete required tasks, then it's time to 'Marie Kondo' that system/process that does not bring joy to anyone.

•Re-examine the data flow through your organization.

How is information shared and understood by each department to make collaborative decisions? For example, what is your RM wish rates strategy, what are the profitable segments to market to first, and your sales team should know what they can offer and to whom? The cross-functional alignment will be critical to success in the execution of new strategies.

•Re-educate yourself with who your guests/segments are.

Sitting in your database are local guests who were never a priority before. What do you know about them? It should not come as a surprise to anyone that hygiene is going to be high on the future guest's agenda. Ask your past guests what changes would they like to see to boost confidence in returning to your property? Will this be mobile check in to reduce

time spent in communal areas such as hotel lobbies? What are their expectations from in term of staff interaction and social distancing? Knowing what the key drivers for post-COVID demand are, that will help you prioritize where investment is needed the most.

I know what you are thinking 'I've been in this industry for a long time. I know my business and who my customers are'. Well, this is a Covid industry we are venturing into. The only certainty is the uncertainty of this period, and the survival of your business long-term will be dependent on how well you adapt to your current reality. I believe proactive leadership is what is needed now rather than management behind closed doors. Rolling up your sleeves and getting your hands 'dirty' will bring several benefits:

- A more engaged workforce as they will feel that you understand their day to day challenges
- Foster better communication between team members
- Your organization will become more innovative, more collaborative and better prepared for the next period of chaos.

I have the utmost respect for leaders who can walk the talk. As business leaders, your workforce will look at you for direction and guidance, so it is time to shine and show them that you are there for them at the Gemba.

Stella Tsantila

INcrementUM



Stella Tsantila
Co-Founder | Hotel E-sales Specialist
INcrementUM



We must decide what kind of hospitality we want to offer

Some say that the current pandemic will trigger radical changes across multiple sectors; do you see this happening in hospitality? If yes, in which way?

To me it is the end of the world as we know it. But this does not need to have a bad meaning.

For the past two decades the tremendous increase in the hotel industry has created a suffocate atmosphere and there have been intense discussions on where this will lead us.

Large hotel affiliations, chains and mergers pushing competition to the limits, renovated old buildings turned to small boutique hotels trying to fit in, houses, flats, lofts, villas, cottages along with the all-time classic family – run hotels struggling to keep up with the sign of the times are the “interesting” hospitality mix of our times.

Yes, demand increased, yes travel is easier than it used to be, access to information is super easy with the internet specially via all this smart devices we hold in our hands but have we equally improved our quality of services? Have we offered a good product to our guests all these years? Or did it remain mediocre or in best cases slightly above average? Have we managed to escape

from the “Sun and Sea” concept? Have we managed to shut out the monopoly of the Tour Operators? Have we even tried to sell our own hotels with our own means? Did we take advantage of the technology given to us? Did we educate our staff & managers to keep up with the new trends?

Until we got the answers straight, the pandemic hit us and re-shuffled the cards and now we must re-write everything from the beginning.

Large islands like Rhodes, Crete, Zakynthos etc depend in their vast majority to the volume of guests brought to them by Tour Operators. Now, that the flights & programmes of the Tour Operators are put on hold, who is going to look after them? How will they sell their empty rooms? Do they have a back up plan?

What I realise these past few weeks is that many hotels have turned to the internet, to digital marketing, to social media campaigns just when the crisis hit us. Probably because they all now realise that you cannot get the message sent to the world if you do not use these means. But, why did we have to wait for the crisis to realise how important



Myconian Avaton | Photo © Christos Drazos

technology is, how important the direct online sales are. How important it is to distribute your property & advertise your services in the best way possible. When all this money is spent to renovate the hotel lobby & the rooms, why don't we invest and spend time & effort to showcase it digitally? No matter how good your merchandise is, if you don't have a good shopping window, now one is going to get inside & shop. How important it is for a hotel to have its own sales channels & it's own database. If it's not a Tour Operator, then it's definitely an OTA who monopolises and takes advantage of the missed opportunities.

Why does it have to be necessarily this or that? Why can't a hotel have a balanced mix of all? So, I think that the pandemic has affected in

a good manner too the hospitality industry. Even those who were reluctant to change are now embracing new methods in terms of distribution of their product. I hate repeating what is mainly common knowledge but, if only all these years, there was a national strategic plan for tourism in Greece. Would we then, have the same stress as we do now that we must struggle with just 3 potential months of operation? I think our perception of things would be slightly different, don't you think? We would see & do things differently.

Imagine if tourism in Greece could be 8 or 10 months a year! Imagine if there was an actual plan and Greece could also depend on medical tourism, silver hair tourism, religious tourism, slow tourism, sports tourism. These

sectors could extend seasonality. Instead we have based our heavy artillery in All – inclusive and massive hospitality. But massive is now what people don't need. We have been social distancing even from our loved ones let alone when you think of packed restaurants for breakfast or large check in / check out queues.

I don't mean to be unfair to those who have invested in their properties and re-branded their business, gave their hotel a character and targeted in luxury sector and not in massive tourism. But, let's face the fact that hospitality in Greece is either this or that.

No middle ground. To cut the long story short we are in front of a very crucial point where we must decide what kind of hospitality we want to

offer and advertise it accordingly for the very near future when we will be called upon to welcome our guests again. And since we are in point zero now, there is no better point to start than from the scratch. Of course, hospitality is affected. Travel the first thing you give up in time of crisis. But not only because there are serious health issues or financial issues or accessibility issues.

Let's all imagine for a moment that tomorrow all planes can take off and take us where we want to go. Would you go? Would you take the plane with the same free spirit attitude as before? Would you book any hotel? Or would you stop for a minute and prioritize on what is important? Would you pack your bags with same things inside? Now, you put disinfectant first and then your bathing suit. Truth be told.



Niche Hotel Athens

From now on, travelers will be seeking for safety, they will not only look for the best value for money deal or for their once in a lifetime trip so they can tick it off their bucket list. Travelers – and you can even ask yourself if you'd do the same – will be seriously considering the overall infrastructure around the place and inside the place they visit as they will need to feel safe and relaxed. But safe first. New methods for cleaning the rooms, dining, serving, check-in procedures have started taking the place of what we knew so far as ordinary. Hotels must adapt – again – and now is the time because the pandemic may end but the “threat” of infection will be here for a while. Hospitality in general must prepare for the next day as today is the new ordinary and it will be here for long.

Which are the two most important disruptions that you expect to take place in the hospitality industry in the years to come due to the current crisis?

Hospitality in Greece is based on the warm smiles on arrival, the warm hugs, the tap on the shoulder, it's about shaking hands. We are not stiff and we cannot stay neutral when we greet our guests again. We cannot accept for long to say hello with our elbows or by nodding our heads. Hospitality – and allow me to talk for Greece – is all about the 5 senses. If we are deprived of one, then there is a piece of the puzzle missing. The picture won't be 100% whole. I am not here to talk about economy or how this crisis is affecting our society. It surely does and in full extend. I mainly believe that hospitality as we know it here in Greece will



Anemomilos Folegandros

not be the same. For a period of time, we shall be looking at each other with suspicion, we will be double checking where to seat, where to sunbathe. This is not a normal concept. So I think that the major disruption is around the general concept of what it means to have holidays.

Having said that, travelers may be looking for more privacy, isolation, distance or even self-service. So, how can a hotel unveil and offer its services when the waiter cannot pure the wine in the glass? If the maid cannot tighten the sheets or give an extra towel and guest must pick it up himself?

Touching, mingling, dancing, strolling around, shopping, dining, drinking, talking, swimming, sitting etc., all these remarkably simple things we do on holidays will be limited to only what is necessary. Uncharted waters but, let's not be pessimistic and let's keep the positive side of things: it's human nature to socialize, to travel, to meet new places, to dream, to hope, to long for. So, this is the strength that will take us back to the top.

The first shock is past us. Now, we just need to re-invent a new era of holidays. And who knows? We might make something out of it, even better, even healthier, even more sustainable. We might even re-invent new ways of spending our holidays which will be bring serenity, relaxation, safety & still keep the fundamental elements of what hospitality means in Greece.

01.

Emy Anagnostopoulou

GREEK NATIONAL
TOURISM ORGANISATION

02.

Claire Griffin

MMGY GRIFCO

03.

Dimitra Voziki

GREEK NATIONAL
TOURISM ORGANISATION

04.

**Marie-Carole
Ancelin-de La Chapelle**

MCA COMMUNICATION - PARIS

05.

Serena Guen

SUITCASE MAGAZINE

Emy Anagnostopoulou

GREEK NATIONAL TOURISM ORGANISATION



Emy Anagnostopoulou
Director, GNTO UK & Ireland Office
Greek National Tourism Organisation

Greece, according to early bookings and market estimates was getting ready for another record year in the tourism sector. Based on data collected up until late February 2020 from valued partners in the British market, we expected an increase of +15-18%, following an exceptional 2019, when the number of arrivals from the UK exceeded 3.8 million passengers.

Since March and with the Covid-19 outbreak leading to a global lockdown, it has become clear that the economic crisis will be profound and that the tourism sector around the world will be hit extensively. The exact starting point towards normality cannot be determined yet, as a lot of the countries where most of our visitors originate from are significantly falling behind in managing this pandemic. In the case of the United Kingdom, the significant delay of the government in taking action and implementing sufficient measures has resulted in a constant rise of the number of fatalities and frightening effects on tourism.

With the closing of the borders and with outbound travel minimizing, major airlines are announcing redundancies and furlough and plea

for government grants in order to avoid bankruptcy, while travel agents are struggling to create sales strategies for their holiday packages due to the uncertainty of not knowing when they will be able to send holidaymakers abroad again.

At this point it has been made demonstrably clear that the fundamental problem is not the host countries. After all, the way the Greek government handled the pandemic was exemplary, leading to praiseworthy comments from international media, which is the best, most effective and most cost efficient form of advertising Greece could have asked for in these turbulent times.

In this context, the main objective right now is the measures that the countries with outbound tourism, the airline companies and the tour operators/travel agents will implement in order to safeguard not only the health of their customers and their co-travellers, but also the local communities that they will be visiting. Ideally the precautionary health measures should be decided on a Europe-wide level, but in case this doesn't happen, Greece is willing to establish its own rules and will try to reach agreements with source



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The adaptability,
flexibility and reflexes
that each country will
demonstrate under
these new conditions,
alongside all the tourism
entities, public and
private, will be decisive
for the future and the
viability of the sector

countries, in line with the protection and security of the travellers and local communities.

In the United Kingdom there are constantly increasing requests from travel professionals towards governmental bodies to consider mandatory tests for coronavirus before passengers board the aircraft as part of the measures to lift the travel lockdown. The tottering travel industry has been plunged into a new crisis after ministers discussed plans for a 14-day quarantine for tourists and overseas business travellers. Hoteliers and airlines already reeling from global shutdowns and a collapse in demand could be hammered by the decision, which is likely to discourage swathes of holidaymakers from going abroad. Airlines have had to deal with a collapse in global air travel as nations went into lockdown. In view of the recent

developments, it is initially foreseen that British Airways, easyJet and Ryanair will fly with less than the required capacity. If the necessary public health rules for the passengers' safeguard cannot be settled before they get on the plane, not only the international transports won't be possible, but also the viability of the tourism sector and the business-related services is in stake.

Recent researches show that the British are willing to travel again soon and that demand for inspirational travel destinations is holding firm. However, the criteria for choosing a destination and accommodation will now vary. Sustainability, which is also a strategic pillar of our country's tourism development, health and safety and reassurance that all necessary measures have been taken will be the most important factors for

every traveller, which can prove to be a decisive advantage for Greece in the coming years. It cannot be ruled out that many of the trends may become permanent, allowing brands to reset their marketing and distribution plans.

The way we travel will change radically, perhaps permanently from now on. The adaptability, flexibility and reflexes that each country will demonstrate under these new conditions, alongside all the tourism entities, public and private, will be decisive for the future and the viability of the sector. Greek Minister for Tourism Mr Harry Theoharis has already announced that precautionary measures will be taken and Greece will be looking into implementing before-travel requirements to those willing to enter the country this summer as

well as keeping some social distancing measures in place in order to welcome British tourists thinking of travelling soon.

Greece's handling of the outbreak has been a success story so far. The key challenge that the country will be facing this year would be to not only safeguard its tourism structure intact and keep building on a successful strategy and synergies, while maintain its competitive advantages that have established Greece as a top tourist destination with unique travel experiences worldwide, but to also become a pioneer in developing new security protocols, strengthening its structural features with a priority focus on people, security and warm hospitality, that will allow the country to look with optimism towards the future.

Claire Griffin

MMGY GRIFCO



Claire Griffin
Managing Director
MMGY Grifco



**Travel Brands That
Maintain a Voice Will
Emerge Stronger**

MMGY GRIFCO and MMGY OPHIR teams have spent the last month in intense conversations with clients all over the world.

The biggest question is “What now”? It is the primary obligation of our PR teams to have the eyes and ears to lead the client. The fact that the media still needs content means we keep rolling. One thing is clear: Maintaining a voice in the market is imperative. Stuck at home, consumers are gorging on media content and online platforms are experiencing unprecedented volumes. That hunger means a need for new ideas thus there has never been a more important time to have a PR seeking out – and making – every opportunity for coverage and exposure. We must be storytellers; be quick to recognise trends and novel ideas because in many ways travel and lifestyle communications have never been so “bespoke” – so much about individual conversations to drive new opportunities.

And so, the critical nature of PR in a crisis – and as travellers emerge from the crisis – is twofold. First, we are engaging nonstop with our media partners about the “now”. Second, we are planning and preparing for change and for recovery. In these two respects,

when our clients find themselves against the proverbial wall, PR is the fundamental fix of the marketing mix.

For those wise enough and bold enough, PR never diminished but we also have proof that – after the initial shock – it is also reviving for those who utilise it to its best effect. In the middle of a global lockdown some brands are forced to pause their PR effort temporarily, but we are also seeing some travel companies and hotels around the world asking us to do more, not less. Because those brands that are brave with their voice will be the ones that recover fastest. The multiple small advantages that we gain for our clients in this period will compound their brand lustre and recognisability. Their messages are being heard louder in a quieter market, and their relationships with the media and other brand partners are thus strengthened for the future.

These are the brands who will not be playing catch-up when tourism and hospitality begins to bounce back – who will already be on the front foot – unlike those who begin to speak again from a standing start. We know from our MMGY Global research teams that travel resumes quickly and that pent-up demand benefits those who are in place to receive it.



**ONE THING IS CLEAR:
Maintaining a voice in the
market is imperative**

KEEP THE CONVERSATIONS FLOWING

Firstly, clients need to talk to their PR teams and remain engaged. The best ideas and solutions can be worked on together and these spring from open and energetic conversations. Working with our clients like this, we are designing robust communications plans for various scenarios and supporting the organisation of re-opening logistics with planning techniques.

PREPARE FOR A MORE FOCUSED AUDIENCE SEGMENT

The present situation, we believe, will speed up a nascent trend in the luxury sector. Guests will be more considered and careful in the holidays they book, with more focused requirements from, and expectations of, the companies with whom they chose to book. At Grifco and Ophir, we are tracking this new wave of sentiment and making it relevant in our planning for clients. We believe UK consumers will book a different type of trip in the coming year but that they will expect a new level of quality in their holidays. In the early stages of recovery, we anticipate that regional travel via car and train will rebound first (and we may even see further micro-segmentation among older retirees and Millennial families on these close-to-home trips). But when we look at historical trends from previous crises, affluent travellers tend to be more resilient and continue to travel even when there is an overall downturn. In the MMGY Travel Intelligence Traveler Sentiment Index (TSI), we are tracking a “resilient traveller” segment that represents 16% of travellers. These consumers tend to be early influencers on a return

to the marketplace, and therefore they are a segment that luxury suppliers should influence quickly.

HEALTH - THE NEW LUXURY

As we scan for trends, we believe that health is going to be a priority. Do you have a doctor at your hotel? If my family is unwell how will you look after us? Our travel PR plans now include a number of healthcare elements and we are advising clients to prepare to include the best possible healthcare in packages should it be required.

DON'T PRESS PAUSE

Those clients that continue to work with their PR teams will be kept abreast of trends like these, which brings me to the “Pause vs. Reduction” question in PR. Those clients that have retained full service, or asked for a reduction in PR are benefiting from strong sounding-boards and the establishment of clear new strategies that include new elements – from medical care to sanitisation. Those who paused efforts could be behind the curve and way off the mark when we have “lift off” again – they will be under pressure as competitors out-perform and gain market share.

INSPIRE, SUPPORT AND BE READY

This is the time to be inspiring and supportive and to guide our clients in a way that is responsible and long-term.

Dimitra Voziki

GREEK NATIONAL TOURISM ORGANISATION



Dimitra Voziki
France Office Director
Greek National Tourism Organisation



**This is the moment
to rethink tourism
models**

Unprecedented times.
Unprecedented crisis.
A global sanitaire
crisis which is evolving into a
socioeconomic crisis that our
generation has neither seen
before nor imagined. With 2.6
billion of earth's population
into some kind of lockdown
for the past two months, the
World Economic Forum talks
about the largest psychological
experiment ever. The world was
not ready for this.

Most experts, underline that the economic downturn on the 2020 global GDP may reach a negative of -6% and a comeback to prior crisis growth is not to be expected before 2023. If these estimations prove themselves correct, we will be talking about the worst economic downturn since the Great Depression.

Our industry was the hardest hit and will be the last to recover. The World Tourism Organization expects international tourism arrivals in 2020 to fall up to 20%-30%. OECD estimates that the implied shock could amount up to a 45%-70% decline in the international tourism economy, while WTTC underlines that around 75 million jobs globally are being at stake due to the current crisis.

Governments across the globe are taking public bullock measures that cost trillions of dollars in order to support the economy and the tourism sector in particular. France, the most visited country in the world, has already announced public bullock measures of billions of euros in order to support tourism businesses and employment.

Taking all the above into account, it is most probable that recovery will be of U shape, this meaning that positive evolutions are not to be expected before the end of 2020. Moreover, security and health safety will be the top priorities for the vast majority of travellers, while it is crystal clear that domestic tourism will be the first type of tourism to start moving. This is why, at the moment, all countries are designing promotional campaigns in order to boost demand for domestic markets.

Millennials, FIT travellers and travellers who seek adventure will probably be the ones to start planning seamless holidays abroad as soon as travel restrictions are lifted. Mass tourism as we know it is not expected to start recovering before the end of 2020 and this is only if there is no second



Covid -19 wave. MICE tourism would be the last to recover.

On the other hand, everybody will need to be closer to nature and reconnect with oneself, while popular tourism sites will be avoided for some time. Green and responsible tourism that respects local environment and culture is the answer to this type of demand. This is the moment to rethink tourism models, invest and promote green and responsible tourism as the main trend for the years to come.

Digital transformation has to become a top priority for all business, while the governments should support them in order to adapt successfully to this new environment. The right use of technology can be a valuable asset that can absolutely transform once's business in terms of management, sales and off course customer experience.

Our industry is facing an immense challenge indeed. In order to set the basis for future growth on solid grounds we should all reconsider tourism as we know it. This is the time to react, rethink and thus recover. The path will not be an easy one, but if we stick together, if we set the right priorities for people and businesses, we shall recover stronger than before.

Marie-Carole Ancelin-de La Chapelle

MCA COMMUNICATION - PARIS



Marie-Carole Ancelin-de La Chapelle
CEO
MCA Communication - Paris



**Travel will find a form of
wisdom, fewer tourists
but more travellers**

Some say that the current pandemic will trigger radical changes across multiple sectors; do you see this happening in your primary field? If yes, in which way?

This health crisis has surprised everyone by the violence and the fact that it has no history, and if all the global economies have been affected, the tourism sector is experiencing this crisis without having had time to prepare. Overnight, we had to learn to communicate differently. Communication in the tourism sector goes mainly through journalists - individual reports or press trips in small groups -, indeed what could be more effective than a report on a hotel in a powerful media to make it known and to give the immediate desire to go there!

Today, when we can no longer invite journalists, we must absolutely continue to keep this particular link, which is the specificity of a press relations agency. We need to make journalists dream of the moment when they can once again discover the hotel (or the destination). But of course journalists as well as individuals will travel differently with a different approach. These moments of confinement allowed many of us to reflect, to rethink

our way of life, our habits and our priorities. Slow life will be the winner in this crisis, from now on we will take the time to travel looking around, meeting and sharing moments with those who receive us. Nature, that has never been so beautiful and pure when this moment, will also be at the centre of new discoveries.

Which are the two most important disruptions that you expect to take place in the hospitality industry in the years to come due to the current crisis?

The hotel industry will have to review its way of thinking and its sense of hospitality by being even more attentive to its customers. Small units will have, in my opinion, more power of seduction than large complexes, hotels located in the middle of nature, sea, countryside or mountain will be more attractive than hotels located in towns. Particular attention should be given on possible discoveries from the hotel, the hotel is no more a destination in itself but part of the discovery of a country or a region. Local cooking or gastronomy (quality of the regional products), outdoor activities will be highlighted as well as of course all the safety aspects linked to sanitary measures



On the basis of your insights from your clients & partners, which destinations are showing the most resilience during this crisis, and which will be the first to recover?

Europe has the capacity to recover, it seems to me that the medium-haul destinations will be the first to benefit from a tourist recovery. If Italy has a lot of work in terms of effective and positive communication, Greece, Portugal, Malta and some northern countries that seem to have handled the crisis better should be the first to return to the tourist scene.

In my opinion, smash prices to sell better could have a counter productive effect. It is important to keep the very concept of the establishment, the one which makes its DNA, it is however important that the clients received a customized attention.

At which pace do you expect travel to make its recovery? Do you expect a quick (V shaped) rebound or something different?

It is a very difficult question, because it depends on the resumption of the air traffic and the opening of borders, there is no doubt that this summer many countries will experience a more important domestic tourism, international tourism should resume in early 2021 but this means that PR strategy has to be ready this summer.

What is the key action that destinations can take at this time in order to benefit in the long run (2021 and onwards)?

Travel will find a form of wisdom, fewer tourists but more travellers. People will travel longer but less often. The journey must become a dream again.

Continue with effective communication, continue to make people dream, be creative in order to always be more attractive. As a service provider, we assist our client with their project from ideas to implementation.

My last hard truth is that we need to think of how to better manage such a crisis in the future.

Serena Guen

SUITCASE MAGAZINE



Serena Guen
Founder
SUITCASE Magazine



**The travel ecosystem
will become a lot
more sustainable**

Some say that the current pandemic will trigger radical changes across multiple sectors; do you see this happening in travelling? If yes, in which way?

People will experience a strange mixture of emotions – exhilaration of being able to leave their homes and the lingering fear that COVID-19 might come back. This will manifest itself in people heading to more sparsely populated areas at first – lesser known destinations or somewhere in nature. They'll like to be in environments that they can control if possible – their own cars (that they can disinfect) or villas/ rented accommodation if possible. For the first few months people will tentatively venture out to their neighbourhoods, wider areas that they live in and then travel domestically before going abroad. Hopefully, we will end up with travellers who think before they book and as a result the travel ecosystem will become a lot more sustainable for the future.

On the basis of your insights from your clients & partners, which destinations are showing the most resilience during this crisis, and which will be the first to recover?

Sparsely populated areas/ destinations will recover the most quickly or destinations that have controlled the disease carefully. We can see this already with states such as Alaska and countries such as New Zealand who are already coming out of lockdown as well as certain Asian countries who have done a good job at managing the situation.

Insights: Americas

01.

Jon Makhmaltchi

J.MAK HOSPITALITY

02.

Sabina Covo

COVO PR AND MARKETING

03.

Veronica Villegas Baldwin

KREPS DEMARIA PR & MARKETING

Jon Makhmaltchi

J.MAK HOSPITALITY



Jon Makhmaltchi
Hospitality Personality
J.MAK Hospitality



**It unfortunately appears
to be a long road
to recovery**

Some say that the current pandemic will trigger radical changes across multiple sectors; do you see this happening in your primary field? If yes, in which way?

At J.MAK, we specialize in connecting independently operated hotels and operators with luxury travel advisors. No doubt we have already started to see change and will continue to as we begin to recover. There is room on the advisor side to be placing fees for their services so that they are not solely reliant on commissions should bookings cancel. On the operator side, there will have to be new consideration for deposits, how those funds are spent and when, as well as a revisit of cancellation policies and fees.

Which are the two most important disruptions that you expect to take place in the hospitality industry in the years to come due to the current crisis?

I anticipate the need for space and a revisit of service to be two near immediate and lasting changes to our business. In the luxury segment, privacy has always been a cornerstone however there will be a greater emphasis on the need for

guests to have their own space and distance away from other guests on property. This will also incorporate into service: things such as breakfast buffets immediately come to mind as something that will need a re-think, does there need to be so much human interaction in the arrival process, etc?

On the basis of your insights from your clients & partners, which destinations are showing the most resilience for the American traveler during this crisis, and which will be the first to recover?

While we are seeing re-bookings into summer 2021 for travel that has had to be postponed with credits issued in destinations such as Italy and Greece, we believe that the US domestic market will be the first to rebound. As we start to see slow recovery and reopening in the US by state, we are seeing interest for people to travel somewhere they can drive to easily or fly private if they have the means. While international government regulations in terms of allowing Americans to visit are still unclear in many areas, we find that those who will want to travel will do so more regionally to begin with due to the lack of barriers.



Soneva Jani, Maldives



I anticipate the need for space and a revisit of service to be two near immediate and lasting changes to our business

At which pace do you expect travel to make its recovery? Do you expect a quick (V shaped) rebound or something different?

It unfortunately appears to be a long road to recovery. We are fortunate in the luxury market that those with the means to do so will likely be the first to get back out and travel again, however there are many that will await a vaccine before they roam too far from home.

Which is the key action that hoteliers can take at this time in order to benefit in the long run (2021 and onwards) from your services?

Now is the time to be a true partner. Local law may protect deposits on reservations but keep in mind travel advisors will remember how you treated them and their clients during this crisis. Those who work to find the best common solution will succeed in the long run. Now is also a good time to show the personality behind the hospitality as we say. Tell stories that share the experience and the people behind the property, people want the human not the business side right now.

Sabina Covo

COVO PR AND MARKETING



Sabina Covo
Partner
Covo PR and Marketing

Hospitality and tourism are part of the human desire to stimulate curiosity and creativity. People have never stopped completely traveling or exploring, not even after the worst of wars and/ or other pandemics. After the chaos, it is all cyclic and its part of the survival of species. Migrating, for many causes. (Permanently, vacationing, visiting family and friends.)

However, we will never see the term “socializing” the way we saw it before. The fact that the coronavirus Covid-19 is more contagious than many others, without showing symptoms on some people for a certain time, and without a not known efficient vaccine until this point, has created a lot of uncertainty in cities and towns that feed their economies from the beauty of tourism.

Tourism will re open gradually, travel should be more organized and less crowed. The protection in airplanes with masks and gloves will be the new normal. Hotels and hostels will take many more distancing measures. This will also be true for tours, restaurants, bars and public events. The question will be, how will people see socializing now. The trend is not written on stone, it will all depend on the psychology of the people. And it will vary from country to country, even from town to town.



**The trend is not
written on stone**

Veronica Villegas Baldwin

KREPS DEMARIA
PR & MARKETING



Veronica Villegas Baldwin
Vice President
Kreps DeMaria PR & Marketing



Overtourism will no longer be a concern

Some say that the current pandemic will trigger radical changes across multiple sectors; do you see this happening in your primary field? If yes, in which way?

No doubt there are radical changes. People are different because of the pandemic and behave differently. Every industry across the board is working differently and with less people and less resources.

There has never been a time where hotels all over the world have had to close and halt operations. There are little to no opportunities to gain any kind of profitability. We are dealing with the most significant decline in our modern-day history. However, there is a silver lining in all this – light at the end of the tunnel. Establishing a reopening strategy in phases now is key.

The economy will be gradually getting better. We need to now shift our focus from responding to the immediate effects of the COVID-19 crisis to focus on longer-term revival.

This pandemic is setting the tone now for future travel and bookings of small boutique properties and villas in remote places in the world. When we start to travel again, it seems reasonable to expect that more people will consider traveling to destinations that offer

opportunities to enjoy nature and the outdoors (forest, mountains, ocean and other remote locations), and/or to generally unpopulated areas. Luxury travel will vary, but places with private locations that are ostensibly made for social distancing will most likely do better. When travel restrictions begin to lift at a domestic level, we will probably see a strong demand for destinations that people can drive to and enjoy fresh air a change of scenery. We anticipate people will look for road trip opportunities and crave quiet destinations. Wellness travel will become front and center again as people will want to get outdoors and engage in activities that make them feel healthy.

Which are the two most important disruptions that you expect to take place in the hospitality industry in the years to come due to the current crisis?

·Brands and company identity — what a company does now, will determine its future. Companies that take on a crisis proactively and provide back to the community will end up gaining a new audience and or loyal clientele.

·Overtourism will no longer be a concern at least not for a



The Ritz-Carlton Residences, Sunny Isles Beach



We need to now shift our focus from responding to the immediate effects of the COVID-19 crisis to focus on longer-term revival

long time. People are changed from this pandemic and will not want to travel where there are massive crowds, nor will venues and destinations want to host massive crowds either. There will be new restrictions and more stringent capacity levels. What we will probably see more of is robust personalized services and a greater demand for privacy. Coupled with that, will be price adjustments and increases as we rebuild a healthy hospitality industry from ground zero.

At which pace do you expect travel to make its recovery?

Do you expect a quick (V shaped) rebound or something different? Our lives as we know it have forever changed, therefore the behavior of travelers will change, hence the travel industry will overall also change. It is unlikely to have a V shape recovery. As we reopen slowly across the board it will be a gradual, phased recovery. There will most certainly be pent up demand wanting to travel, but not as many people will be able to travel. It will take time – it's a new normal.

Which is the key action that destinations can take at this time in order to benefit in the long run (2021 and onwards)?

Right now it would be key for everyone to honor restrictions set by government mandates. If you're in a position to help support the industry, do what you can. How you respond to the community and the industry today will stay with a company and its brand(s) for the long term if not forever. It will be during this time that a company or organization will be remembered most.

It's also key right now to continue to market your destination, hotel, product or industry in the most sensitive way and continue to create demand. People will travel again and you want to instill that desire and that dream to travel and enjoy new experiences and cultures. You also want to ensure you keep your brand top of mind, to keep people thinking of you before they can even travel, so when they are ready to do so, they will do it with you.

If you have a restaurant, or a culinary school, it's a great opportunity to offer virtual experience through Instagram, Zoom, Facebook or Teams. Offer cooking (discounted or complimentary) lessons and host happy hours so guests can enjoy a piece of your hotel or destination at home. It would be good to tie in a local charity so for those who participate in the virtual event can make donations to people in need. It's also import to plan for the future. It's the perfect time to plan into 2021. For meetings and groups travel, it's a great opportunity now to coordinate "Forward Bookings," for 2021 especially for team building and small to mid-size groups. Meeting planners can often times lock in current rates for future travel. Currently prices and rates have decreased dramatically. But in some regions that are now starting to reopen, you may see price increases in the very near future to ensure smaller crowds.

Architecture & Design

01.

Vassilios Bartzokas

DESIGN AMBASSADOR

02.

Ria Vogiatzi

ELASTIC ARCHITECTS

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Serdar Kutucu

SLOW

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Dimitris Karampatakis

K-STUDIO

Content curated by the Design
Ambassador & ARCHISEARCH.gr



Vassilios Bartzokas

DESIGN AMBASSADOR



Vassilios Bartzokas
Founder
Design Ambassador



**Worldwide, the fishbowl
of artificial experiences
is being rejected**

The pandemic gives life to new ideas, sparks experimental thinking and results in explorable options. At the same time, it creates longing for a life richer in experiences, vistas and sensual immersion. Architecture and design make up integral parts of tourism, “building” on that which can be seen and that which can only be felt: an ambiance that awakens our emotions, sparks our imagination, calls for action and re-kindles lost memories. In the meantime, this desire turns into user-generated content: ratings and recommendations on online platforms, social media posts, blog articles. This model is in place everywhere, from the design of a city hotel to an exclusive resort, from a glamping ground to a pop-up experience hotel.

It is doubtful whether the development of city infrastructure will be affected by the pandemic, but its social structure will change. Functional solutions which reduce energy costs will become part of our day to day. Working remotely may turn into the post-pandemic norm in favour of the environment, increased free time and reduced expenditure of company resources. These

changes may affect the size of homes. They may transform Airbnb properties into rental spaces on the short term, notably changing the scene for tourism and, of course, creating opportunities for different kinds of hotels and vacations. After all, we don't expect cities to become primary tourist destinations during the coronavirus era.

With an obvious preference for the countryside and, more specifically, secluded, airy and sun-kissed destinations, concepts of luxury can be viable, if the necessary well-placed and timely actions are taken from a marketing perspective. Certain businesses will welcome exclusive guests and others will take this opportunity to make the appropriate investments towards next year's season.

Slow living entices vacationers keen on discovering the meaning of life through activities that take place at a more leisurely pace. In the untouched side of nature, they are called by a world with less connectedness, closer to the lost Garden of Eden which everyone secretly dreams of. High-end resorts and hotels are favoured as seclusion is embedded in their DNA. In nearly “secret” locations,



a select few can enjoy ample and abundant public and private spaces to relax out of the public eye, but always present via technological means and, in certain cases, able to socialise in the name of lobbying. This is the viable side of tourism in this day and age. In the meantime, whilst waiting for tomorrow, “mandatory” safety measures are not viewed as ideal by hotels.

Worldwide, the fishbowl of artificial experiences is being rejected. People of tourism are expected to produce experiences that are authentic, unique, meaningful and true, ideal for helping travellers “make up for lost time”. A day of complete and utter freedom, with everyone playing their special part to make it happen.

“

With an obvious preference for the countryside and, more specifically, secluded, airy and sun-kissed destinations, concepts of luxury can be viable

Ria Vogiatzi

ELASTIC ARCHITECTS



Ria Vogiatzi
Founder
Elastic Architects



**Protecting and not
just promoting
destinations**

Your prediction on future hotel design trends as the top Greek architecture firm specialized in travel and leisure architecture here and abroad.

Design has always been inspired by the social psychology and through time has followed the political and social changes. This is a period where physical distance is becoming a method of protection and necessity.

We have received instructions from our International Clients to proceed into several design changes that will comply with a new design manual that is produced currently on an International level. This has to do with access distancing on spaces, creating private areas, provide more space per guest, design custom furniture with special purposes e.g. for reception or hostess of the restaurant where antiseptic fluid will be available for the guests entering the area.

We understand that the biggest challenges we deal with are on the food and beverage department, where hygienic restrictions are larger now. Therefore, we have limited the use of larger tables and have located them in greater distance than before, so that people feel comfortable within their private space. Intimacy is no

longer the prerequisite. The a la carte restaurants are preferred against the buffet as the latter will need to now provide individual packaging meals. Very important is the new use of materials, this means that we can specify materials, fabrics etc. that can be easily cleaned and disinfected so that surfaces for use are smooth *e.g. wicker is not considered a cleanable surface

It is a new design challenge that the large-scale resorts and hotels have to comply with and be considered internationally safe. In terms of hotel and resort design we need to point out that high end resorts and hotels such as Aman Resorts are already on a better mode and case. This is because this luxury brand has a narrative based on privacy and social distance. Public spaces are quite large and keep distance between seating areas. The count of guestrooms is always less than 50 keys so they are boutique hotels with a rather small number of guests using the areas. It's a resort primarily for adults so most of the guest rooms are limited to 2 to 4 people

The next day will be a new look on the design tools we have up to date. We need to see what true luxury means, privacy, space,



JANU Montenegro created by Aman

materials. It's a reinterpretation of the design language we used up to date but in a more responsible and methodic manner.

Protecting and not just promoting destinations...

Our primary concern in creating architectural experiences for the guests in the tourism, is to analyze, understand and reinterpret the architecture, landscape and environment that our project is located on.

The Janu Resort in Montenegro that we have designed, the new brand created by Aman resorts, is a clear example of this concept. Montenegro is a destination that fascinates its guests with its natural beauties, the myth says that when god was sharing beauties to the world his bag was torn apart on top of

Montenegro and everything fell there. Our design is to celebrate this uniqueness. The plot is located on a valley between two hills. Our architecture sculpts the void between them and creates a new architectural concept of with a new formation, designed with organic shapes like contour lines, levels of structure that are planted with the same trees in type and size as the adjacent forest. It's like a building coming out of an existing landscape. The creation of a water bay is contributing uniquely to this feeling. It's the sense of place that must be achieved in every location. We have projects around the world and need to be inspired by the local architecture and nature each and every time. When the guest arrives in a new destination needs to have a sense of place. Our Greek

projects for high end international brands and developers, in Mykonos, Crete, Santorini or Athens have a strong sense of architectural and interior design language that is inspired by the place but with a new contemporary view of design.

The example of the Durmitor resort, were the villas are inspired by the local farm houses but with a modern contemporary architectural language. The spa is inspired by the glacier cave creating a mystical feeling of this mountain resort.

When we do interior design, it is essential to bring into the concept local materials and craftsmanship. We aim to research vendors and craftsmen in the area and get them involved in every one of our projects so that local

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High end resorts and hotels such as Aman Resorts are already on a better mode and case. This is because this luxury brand has a narrative based on privacy and social distance

community participates and also bring the local flavor into our design.

Does hotel architecture & atmospheres contribute to customer engagement?

Customer engagement is the reason behind most design ideas and the main reason for each final decision. This is about using creative design tools like symmetry, perspective, clear simple shapes and forms, but most important of all is to analyze, research, discover and reveal the hidden jewels of nature within each property.

We aim to create Instagramable hotels and resorts so that guests create and keep the memories of their trip and more than this, they visualize themselves returning into to this same



Nammos Dubai | Photo © Stelios Kyriakis



We understand that the basic rule for designing luxury destinations is not always about the budget allowance

place every time they see their picture again. This used to be the target for each project, to create areas, corners, pools and specific locations. Nowadays, the aim is to create an Instagramable project in a holistic way, to identify every corner where we can have a unique experience and create a framed view for the memory to be preserved.

Is design only meant for luxury travel?

Our large variety of projects allows us to have a good understanding of what design for luxury travel means. From high end resorts and leisure with Aman Resorts, One n Only and Nammos restaurant in Dubai, to more boutique hotels such as the Coco mat hotels in Athens and the Sir Paul hotel in Limassol, we understand that the basic rule for designing luxury destinations is not always about the budget allowance. We have a team internally in the office, that is working exclusively on budgeting our design (procurement, cost estimation and value engineering per stage) so that we can ensure the clients required budget is achieved as at the same time we maintain the Operators and Clients standards.

There are high end projects with greater budget allowance and others with more restricted budget. In all cases design aesthetics and rules apply. The Nammos in Dubai is one of our projects where the absolute luxury experience is achieved in every way. The detail in furniture and floor patterns and FFE as well as the quality of materials used in this project, is unique. At the same time projects like the Sir Paul in Limassol have been identified as unique luxury destinations with the level of design provided where the final result is astonishing!

Renovating the existing.

We have great experience and currently renovating many hotels and resorts in cities and Greek islands. This is an amazing opportunity for us to transform an old building (most cases are old hotels or office buildings) into amazing hotels or resorts. We research and rediscover the projects with its natural beauties and the potential the existing buildings can offer.

Serdar Kutucu

SLOW



Serdar Kutucu
CEO
Slow



**Slow, the new
word for luxury**

Serdar Kutucu has deep understanding of the travel industry and hoteliers needs paired with his wealth of experience in marketing, communication and consultancy. After being appointed COO of Design Hotels, in the heart of pandemic crisis he launches, as a real visionary the Slow collective a new concept of luxury hotels. It's interesting to read his vision, deployed in the following interview.

How did come up with the idea of Slow collective?

Travel and hospitality have always been my passion. I personally have been visiting many hotels and meeting entrepreneurs in this industry over the last 12 years, my business partner Claus Sendlinger has been the founder of Design Hotels 27 years ago. There is a lot of inspiration we gained from these people and places. We have been guiding the positioning and re-positioning of many hotels in many countries, San Giorgio Mykonos (now Soho Roc House) for example has been one of our initiatives in the year 2012, where we re-launched it together with its new management for a new target group as a "Design Hotels Project". We were always

dreaming of our own places. We are committed to the overall slow movement, it is a cultural revolution against the notion that faster is always better. The Slow philosophy is not about doing everything at a snail's pace. It's about seeking to do everything at the right speed and properly. We work in multidisciplinary teams and collaborations, pushing boundaries of travel and re-invent new forms of hospitality concepts.

In which degree of its development is it now?

The portfolio of Slow currently includes La Granja Ibiza, a working farmstead supporting a discourse on organic farming, sustainability and our relationship with the food we eat, and Tulum Treehouse, a hybrid guesthouse that facilitates exchange between artisans, chefs, artists and designers toward the preservation and evolution of Mexican craft traditions. Next to open is a reimagined noble house in the old neighborhood of Graça in Lisbon, and a creative campus at the intersection of wellbeing, culture and technology in Berlin, where we will also establish the Slow Foundation, including an academy, a museum of humanity and subterranean rituals space.



La Granja | Ibiza

We want to further grow this portfolio mainly in Europe with our core interest being in destinations that bring variety, like a mountain location, leisure destinations connecting urban environments that are new to our portfolio, as well as alternative and emerging destinations that allow novel approaches and hospitality concepts. Greece is certainly on our map too!

What practically means a Slow hotel?

The future of travel will face major challenges that will demand that hospitality businesses embrace innovation and new technologies. Hotels will be the new community hubs, providing everything from libraries to wellness clinics, learning programs and platforms for guests and locals to interact and have new experiences. The Slow hotel is a place to simply

feel good, such experience should come with a healthier, wealthier and happier being. Every place still has a unique theme it focuses on, which comes from its local environment and culture.

We consider the future traveler's needs, creating a premium through a holistic guest experience, encompassing cultural programming, social interaction, on-site content strategy, outstanding architecture and design, and a fresh, localized approach to sustainability and social impact.

“Maybe the virus was just an emissary from the future. The drastic message is: Human civilization has become too dense, too fast, and overheated. It is racing too swiftly in



Treehouse | Tulum

a direction in which there is no future”, says the trend forecaster Matthias Horx. In which ways can we step back, pivot and take actions for a more meaningful life?

The epidemic will offer a blank page for a new beginning. Eventually allowing humanity to reset its values. We are starting a new future that will require a deeper sense of consciousness in everything we are doing. I see an opportunity in redefining competition into collaboration. The last years have really been worrying because of such a selfish society. We will move into a more collectivist culture and that's good. I would be grateful for a more conscious, more human, and more empathic humanity, facing environmental challenges, as well as supporting the mental health of our society for a better future. Travelers will



The Slow philosophy is not about doing everything at a snail's pace. It's about seeking to do everything at the right speed and properly

value transformative experiences that enable them to interact with and contribute to local communities while also pursuing destinations that help them to retreat and recharge from the hectic urban lifestyle. Ultimately, the new travel horizon will be one that asks not where or how, but why?

The slow movement in architecture was championed by Michael Sorkin, whose terrible loss we recently experienced because of the Corona virus. Is your approach somehow relevant to this point of view?

The world has lost a great architect who has been committed to a more equitable and sustainable urban planning, and to create beautiful cities for our planet. We are



absolutely aligned with Sorokin's philosophy. Ultimately we want to share with others, to abandon the sense of self that obsesses us, to learn how to work and live together and to embrace the idea of the alter ego, humans are sharing space, joining groups and working together, trying out new forms of living in harmony. Slow Architecture and Design focus on process, origin and materials, while valuing the environment and the individual.

“By 2024, personal and experiential luxury alone are estimated to be a €1,1260 billion market—a significant increase from €845 billion in 2015” says the Boston Consulting Group. In the day after the corona virus, is experiential luxury going to be defined in the same way as it is now?

According to the new normal the values and mindset of future travelers will drive innovation in the travel sector. It needs new concepts, services and approaches. Sustainability and luxury travel will be expected to be synonymous, both in the environmental sense and from a cultural perspective. The luxury industry will continue growing but the added value will be found in the intangible, the experience, emotions and the intellectual, more than in any product. Brands have to become more empathic and humble, branding will be more subtle.

Is the idea of collective living in hospitality an innovation?

Hotels are actually the origin of the idea for co-living. However it has been re-discovered



Marina Marina Office | Berlin

in a new interpretation recently, an idea born from the shared economy especially in the real estate business. Hybrid concepts reflect the rapidly changing intersection of home, work, and hospitality in a single, community-building universe. We will see more of these coming and the concepts will have to be proved and improved constantly.

If you had to inspire the Greek architects, which international examples of “slow architecture” would you recommend?

It's not really about architecture, it's how the ingredients of a place are integrated with each other. In fact good architecture, design and sustainability are common sense for us today, but architecture could think beyond drawing boards, to imagine atmosphere and feelings for a more meaningful experience and creating an added value through such space.

What knowledge is gained after 11 years of building and nurturing a community of creative hoteliers and sophisticated travelers through designhotels.com? Both business wise and design wise.

Our business model at Design Hotels allowed a constant evolution, I'd say this is what made us stand out in many ways. We have developed our own in-house creative team which helped to implement any good idea immediately. This is needed as the travel and hospitality segment of independent hotels has grown so fast in the last decade especially, every hotel now wants to be “boutique”, while our passion was to define the evolution in our niche of lifestyle hotels. Design Hotels has been able to create a community of the most creative hoteliers in the world, these people are game changers, many of them not grown in this industry and this is why they think things differently. My passion today, the learnings and inspiration I gained mostly comes from this community, which we called our “Originals”.

Dimitris Karampatakis

K-STUDIO



Dimitris Karampatakis
Co-Founder
K-STUDIO



**After the Next Day
of Tourism**

Dimitris Karampatakis, co-founder of k-studio, a leading architectural firm in the hospitality sector, speaks with Thanasis Diamantopoulos, senior editor of Design Ambassador, about the next day of tourism, which will come after the coronavirus pandemic.

How do you envision the next day post-lockdown for tourism?

In order to envision the “first day” we will need to allow for the passage of some time after the end of the lockdown, so that these predictions can hold some meaning. The larger this time period, the more my response will differ. On the “first day” this May, I don’t expect much change. The more people question whether each country’s health system can handle the rate of new cases, the less tourism there will be. One of the main conditions for tourism is the movement of the population. In Sweden and Germany there are many more hospital beds available for patients. Greece will need more time to invite tourists, which is why I foresee mainly domestic tourism this August. Even this will mostly mean “unwinding” with family at a vacation home or as guests of friends, and not necessarily spending time at a hotel. As a result, international travel will start with the appearance of a vaccine to counteract the coronavirus, or with the appearance of a travel protocol agreed upon by the countries in question, according to which travel can take place under certain conditions which can be tested for through an application or at the airport. Even a protocol like this will require months before it can be enforced.



In the future, we will be able to travel to a place and explore it in more and more authentic ways



Casa Cook Chania | Photo © Georg Roske

Which additional measures will be enforced at tourism facilities, designed so that clients can enjoy a pleasant vacation?

In order for a vacation to be enjoyable, there cannot be too many protective measures in place. When designing accommodations where people will want to “have fun”, the first thing to address is the choices which will be offered to guests so that they don’t feel constrained. Especially in places like the hotels that we are designing, we offer multiple different schedules so as to give off a feeling of freedom. This is the meaning of luxury, after all: freedom of choice. When your prospects are limited with a “don’t go there, don’t do that”, it’s not possible to have a pleasant experience. It will be natural to choose to go to a private space with fewer limitations. It’s more important to focus on

the filtering and designing of a trip than on the destination itself. This will all be over in a year or two so there’s no point in re-designing hotels.

What’s in the books for the next day in Spain?

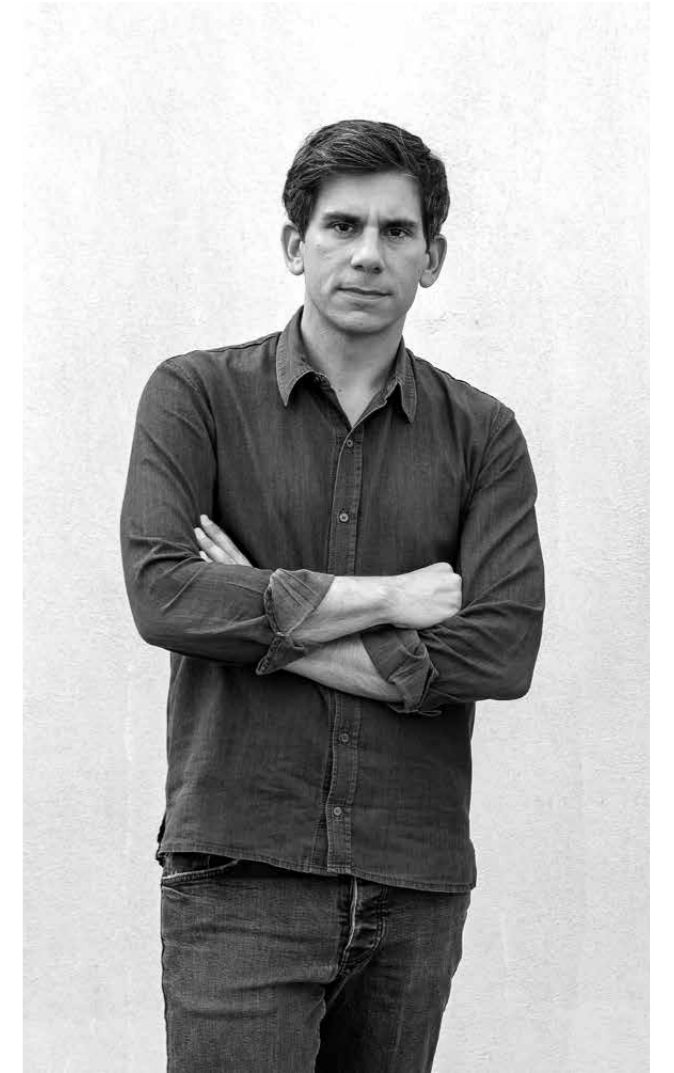
There is a different brand to preserve during this period in Spain. To my knowledge, tourist accommodations there are generally of a larger size. At those with a capacity similar to that of Greek tourist accommodations, concerns are also comparable; they prefer to wait a little while so as not to mar the experience. Larger-scale accommodations are expected to transfer their gastronomy, fitness and general social facilities outdoors, under pergolas and in gardens.



Vora Santorini | Photo © Ståle Eriksen

What would you like future of tourism to look like?

In general, I would like to travel so that I can learn new things about a place, not to find myself in a “bad replica” of the destination or in a fishbowl. In the future, we will be able to travel to a place and explore it in more and more authentic ways. This educational element is key, not just for children but for adults as well. Returning as a better person than you were when you left. Seeing travelling as an opportunity for self-betterment. Thinking about how much you owe to your destination. How many of our hosts are actually benefitting their communities and the environment.



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This is the meaning of luxury, after all: freedom of choice

Academic Insights: an overview

01.

Dimitrios Buhalis

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BRACE the future and time to Reignite, Refocus, Redesign and Reengineer our global tourism industry: the new 4Rs of tourism!

In my 35 years in tourism and hospitality strategic marketing, we have never encountered a crisis such as this. Most crises, such as September 11, terrorism attacks, fires, tsunamis, earthquakes, hurricanes and tornados, even the 2010 Eyjafjallajökull volcanic eruption, lasted for a short period of time, counted numerous victims, destroyed infrastructure and superstructure however, the industry bounced back into recovery phase fairly quickly. The COVID-19 has taken everybody in the tourism industry by surprise because it has already killed so many people, caused the world to pause and destructed everything we do globally. It is impossible to predict how long it will last, what conditions will be required for lifting restrictions, how many waves it will entail and what will be the operational and strategic requirements for the “new” realities. Thankfully it does not damage the infrastructure and the superstructure. Many people failed to realise the seriousness of the situation and even now remain in denial stage. Unfortunately, risk and crisis management are often an afterthought, rather than a well-rehearsed plan and these organisations are exposed to risk more than others.

Many colleagues and friends from around the world have asked my advice on how to navigate through these uncharted waters, survive this period and prepare for the future. Crisis management has primarily six stages, namely: **preparation** time when organizations take actions to prevent disasters and avoid crises; **prodromal** stage when it becomes apparent that the crisis is approaching and is inevitable; **emergency** stage when the crisis hits and urgent action is required to save lives and resources; **intermediate** phase when short-term needs must be addressed to restore some normality; **recovery** stage that repairs damaged infrastructure and superstructure; and the **resolution** stage when society and organisations adjust more to the new realities and reengineer their processes to fit the emerging market conditions. They also prepare for other possible threats. Resilience is about accepting the new reality fast enough and progress to the new conditions emerging. The speed of adapting, preparing and implementing strategies that address the new realities, rather than looking back, determines the competitiveness of organisations and their ability to survive in the future.



Being an academic and a researcher in smart systems and agility, I am always alert on contextual situations, seeking real time solutions to optimize outcomes. My research is always based on credible sources and decision-making is based on dynamic evidence, accessed in near real-time. I have been following COVID-19 since the very early days. As a result, I have introduced the Buhalis Rapid Communications on my blog <https://buhalis.blogspot.com/> to alert colleagues and friends of the seriousness of the situation and prepare them for the consequences. I started shouting BRACE BRACE BRACE and resilience: The global tourism should prepare for a major impact from Coronavirus COVID-19 as early as on the 3rd March 2020. At that time many colleagues were really upset by the

cancellation of the ITB... On the 17th March 2020 I predicted that the global crash of the Coronavirus Tourism industry and called for **humanity, resilience, solidarity and leadership**. Greece went into lockdown and introduced its non-essential movement ban on March 23. On the 26th March 2020: I called again BRACE BRACE BRACE for Greek Hoteliers predicting that Greek tourism cannot open until July and flights, bookings, occupancy levels and income will be very limited. On the 1st April 2020, I changed my stance and predicted that tourism will reach GROUND ZERO. I felt obliged to raise the alarm and ask industry to prepare urgently for this reality, predicting that tourism as we know it, will stagnate for the 2020 summer season. If we manage to have a short season before the virus reappears in Autumn, we will



have to be very smart and agile to deal with last minute, short distance, primarily ground transportation and principally domestic leisure activities. I stated then that it is with regret that I do not expect any serious international tourism activity happening in summer 2020. That meant that I expected Tour Operators being unable to operate charter flights, whilst non-frills carriers will struggle to operate with low fares and low load factors. Airlines in general will suffer catastrophic consequences and will struggle to survive. Tourism activity will primarily be domestic and staycation will prevail. If we manage to control the virus, tourism will come back stronger in summer 2021. Many industry colleagues and friends asked me to be more optimistic and "cold-blooded". They told me that my predictions would be

catastrophic and therefore they simply cannot materialize... because they will cause too much disruption. I still predicted a huge economic and humanitarian catastrophe and asked colleagues and friends to prepare for a hard crash. On a positive side, the COVID crisis brought forward a sense of **solidarity** where individuals, organisations and communities got together to support those in need and those on the front line of the virus with a range of acts of kindness. Kyros Asfis and I, established the 360TourismSolidarity community on Facebook <https://www.facebook.com/360TourismSolidarity/> to acknowledge solidarity actions of tourism and hospitality organisations to the wider community. To address COVID-19 effectively we need to be disciplined, exercise solidarity and humanity.



At this time, we require inspirational leaders who can take us safely forward into the next stage.

Optimism and sticking our heads in the sand will not help. Neither will looking into the mirror to predict what is coming our way in the future. The new reality requires **transformational leadership** to urgently identify needed change, create a vision to guide the change through inspiration, and execute the change in tandem with all stakeholders. The best example comes from aviation. No pilot wants an aircraft to crash, but when you can predict an inevitable crash early enough, you can take urgent measure to minimize the damage of the impact. I am inspired by Captain Chesley "Sully" Sullenberger the US Airline pilot, who in 2009 successfully and single-handedly ditched his Airbus A320-214 in the Hudson River in New York, after a bird strike disabled both engines. He had 3.5 minutes or 210 seconds to make critical decisions to save the life of the 155 people on board the US Airways Flight 1549. In his many leadership videos and books, he emphasizes how critical teamwork is required in these situations. Although Captain Sully was the pilot in command, the team coordinated actions to make sure that no lives were lost. The co-pilot, flight attendants, and even passengers assisted each other. We need to learn from this experience and prepare fast for the crash through collaboration, altruism and solidarity. Captain Sully did not waste time, he disobeyed Air Traffic Control commands and was focused on one task only, to take his passengers to safety. In interviews he said "I was Sure I Could Do It !" <https://youtu.be/rZ5HnyEQg7M>

Now it is time to Reignite, Refocus, Redesign and Reengineer our global tourism industry: the new 4Rs of tourism!

Analysing the existing situation, it is evident that a range of factors will determine the 2020 Summer Season. This advice is only for those who need it and seek guidance on making it to the better days that will come after this nightmare is over. International travel in Summer 2020 will be largely restricted, to reduce spreading the virus between countries and regions. We need to examine carefully **The Tourism System** which is based on three regions, namely: the place of Origin where travellers come from; the Transit region which represent the transportation space; and the Destination region, where travellers go.

Place of Origin. Most countries have suffered a considerable loss of life, with the USA, UK, France, Italy, Spain, China, Belgium, Brazil and Germany leading the list. As the national health systems of the regions worse affected have exhausted their limits, Governments will be really careful and have proactively been advising their citizens to avoid leisure travel until the discovery of a vaccine that will reduce the infection and death rate. The health crisis has put significant pressure on health systems whilst lockdowns have significantly damaged national economies. Most governments had to reallocate their national budgets and cover the immense cost of the health crisis, purchase of PPE, creation of extra ICUs, ventilators, etc, whilst offering unemployment benefits and furlough pay to



their citizens to survive the crisis. Against that background, governments will suffer from low tax income and VAT, since most of the economic activity is still paused. Most governments have provided COVID-19 Exceptional Travel Advisory Notices advising citizens against all but essential international travel indefinitely. They have strongly advised citizens to return now, where and while there are still commercial routes available. Many airlines are suspending flights and many airports are closing, preventing flights from leaving. Governments paid significant amounts of money for repatriation of citizens, testing, providing hospitality in hotels for quarantined travellers. The cost and effort of repatriation has been enormous and it being financed by the taxpayer. BREXIT, ECONOMICS and the collapse of Thomas Cook will remain to

be external factors in the current climate that will influence demand, especially from the UK. Disposable incomes will vanish for those who became unemployed or were unable to work as well as those still in employment due to the global economic recession. For many people, travelling will cease to be an affordable option or one that they have time for. Even when the coronavirus crisis has passed, many governments will be apprehensive in reopening their borders to avoid importing a second wave of infected travellers. We have seen this in China already. Countries that have suffered severe impacts from COVID such as Italy and Spain will be very reluctant to import new cases from countries that will have a COVID peak later, such as the UK or Sweden for example. This will have huge implications for insurance policies too. As many countries have



still not seen the peak of the pandemic they are really nervous relaxing the restrictions. They are also uncertain of the impacts of the gradual reopening of the economy, schools and allowing leisure activities. It is very likely that countries will have to return to restrictions when their R0 value is increasing and that will mean citizens will be asked to refrain from travelling. Hence, leaders at the place of origin have made extensive statements advising their citizens “not to rush” to book their summer holidays. Insurance companies will also find it very difficult to insure international travel and this may be at very expensive premiums that will be Unaffordable or discouraging for leisure travellers. Voices for smart travel will encourage citizens to holiday close to home for safety and also in order to support the regional economy.

At the **transit region**, transportation services are perhaps the most vulnerable to the COVID-19 disruption, as travellers are afraid to board on inevitably crowded vehicles and travel in confined spaces. Already most airlines have grounded their planes and urgently seek methods to reduce the risk involved. Most countries have closed their borders for the foreseeable months and introduced strict controls to prevent the spreading of the disease. Airlines will take a long time to recover, if they ever survive. So far FlyBe, Virgin Australia, Air Mauritius, and Norwegian subsidiaries have failed. Alexandre de Juniac, the General-Director and CEO of the International Air Transport Association (IATA) explained that air transportation will have to suffer “de-densification” referring to social distancing in plane cabins and “neutralisation”



that involves leaving seats empty on flights. Not only passengers are very nervous to fly but the economics of air transportation change rapidly. We need to consider the actions to regain passenger confidence and invite them back on board. Under these conditions, a lower load factor will mean that fares will need to increase to make sure that routes remain profitable. Effectively airlines will emerge as business carriers offering business class type of space, service and prices. Low cost airlines and charter flights will suffer most and this will have major impacts on destinations that depend on those, such as islands and peripheral regions. Other surface transportation modes may benefit from this situation. Train, coach, ferry transportation that can adopt the two principles above and can be more flexible in scheduling and cabin

conditions will regain passenger confidence earlier. The principles of de-densification and neutralization will still force companies to increase their fares. More importantly it is the use of technology and smart systems that need to be used, specifically on the transit region where passengers feel more vulnerable, to protect them, as well as transportation and borders staff, as well as fellow passengers.

At the **destination region** the impact and stage of coronavirus depends on the preparedness of the region to deal with the pandemic. China closed its border to most foreign travellers to prevent the first outbreak and then re-closed borders to avoid a new outbreak of the coronavirus by imported cases. The restriction applied to foreigners holding visas



or resident permits, as well as to those holding APEC Business Travel Cards. Badly hit regions such as USA, UK, Italy, Spain, France, Belgium that failed to protect their population will be unattractive tourism destinations until the situation stabilizes, perhaps with discovery of a vaccine. Regions such as Greece, Bulgaria, Cyprus, Portugal that have performed well many be considered safer and may be able to open up more facilities to visitors. It is clearly a decision that epidemiologists should take together with local authorities, once they can establish the parameters for each particular place. The contextual study needs to include geographical and urban planning characteristics, identify congestion areas and create suitable plans for social distancing. Regions that are easily accessible and can reach appropriate health facilities within a short period of time and at an affordable cost are predicted to be more open to external risks. Islands that may require support from larger hospitals in mainland may face more challenges and delays in reopening. The place of origin of tourists and key markets may be of particular interest as different regions had different COVID peaks. There is a major concern from local populations on whether they really want to open up their destinations to visitation and attract tourists, particularly from badly affected regions. This is the case in destinations where health structures are not in a position to deal a significant increase of population due to tourism. The number of available beds and intensive care units, as well as medical staff and equipment can determine the tourism activity that will be allowed by authorities in many occasions. Each destination is facing different level of challenges and therefore need to be treated differently.

There is no easy way forward until a vaccine and full medical treatment have been developed. There are **no magic solutions** for those regions and business that depend on tourism. Each stakeholder may experience the crisis differently but will all suffer in the short term and learn our lessons for the longer term. The level of suffering will depend on location, type of product, organisational structures and finance, marketing strategies, expertise, resilience and business continuity planning. Some business or regions



Organisation (WHO) has issued operational considerations for COVID-19 management in the accommodation sector on 30 April 2020 (<https://apps.who.int/iris/bitstream/handle/10665/331937/WHO-2019-nCoV-Hotels-2020.2-eng.pdf>). The document offers guidance to collective tourism accommodation establishments such as hotels and similar establishments, holiday and other short-stay accommodation, and campsites. These considerations provide guidelines as well as best operational practices for the management of accommodation establishments, as well as for specific front office housekeeping, recreational facilities and food and beverage functions. It also provides advice for handling COVID-19 cases in hotels and tourism accommodation establishments for both staff and guests. Simplifying has done similar guidance for airlines <https://simplifying.com/guidance-airlines-covid-19/>. Although protocols and guidelines are useful each organisation needs to carefully analyse the process of service and all inputs and outputs throughout the value chain. They will need to analyse each step, identify the contact points and redesign processes to protect the health of all people involved. Processes need to be redesigned to deal with the challenges faced in real time and at the particular context, requiring smart solutions.

may even benefit from the situation. I predict that domestic destinations that are within two hour drive/train ride from key markets, such as Bournemouth, the New Forest and Brighton in the UK may benefit from the expected staycation. Social distancing is almost against tourism where we travel to be in close proximity with our loved ones and also with people in different places of the world offering authentic experiences. We need to explore the tourism system in more detail and use **smart and agile tourism methodologies in real time** to manage tourism and hospitality organisations and destinations. At the **macro level** there are ethical, social, cultural and economic implications. We need to establish whether we are ready to expose our communities to the extra risk that coronavirus

patients may bring. We need to establish new carrying capacity for destinations, according to the capacity of health structures as well as the geo-distribution of tourism activity. New procedures are required at borders and at entry points. Those procedures need to be well designed and address all eventualities in a pragmatic way. Destinations need to protect travellers, employees and host populations. To do that they need to address all risks in the entire ecosystem. Hygiene rules should be applied and followed by all religiously, to protect everybody in the system. Early detection systems should be in place and clear procedures for all eventualities. At the destination the flows of tourists, the transportation modes they use, honeypots and pedestrian routes need to be redesigned to ensure that the disease is not spread. Social

distancing changes dramatically business models. More resources will be required for co-creating tourism experiences. For example, a hotelier may require double the housekeeping and waiting staff to offer services under the new protocols. This will balloon costs of production and delivery. Prices may have to increase dramatically to accommodate the new requirements, as fewer travellers will be using more space on given capacity, especially for transportation, hotels as well as food and beverage outlets.

At the **micro level** tourism and travel organisations are places where guests stay temporarily in close cohabitation. There is a risk of high degree of interaction among guests and workers, which requires specific attention in the context of COVID-19. The World Health

Tourism companies and regions are desperate to **#ReigniteTourism** around the world. They need to support the economy and enterprises to generate the much-needed employment and economic benefits. It is really painful to see so many aircraft parked on airports around the world and to see so many communities that desperately expect tourism income to survive. However, it is clear that this needs to happen very carefully to avoid more deaths. We need to be alert, observe all information, use smart methodologies and apply agility as we find a new normal in the tourism industry. Preparation, agility and fast and calculated reactions are key to survival. Technology empowered smart and agile management and marketing will support us to survive in the short term.



BRACE BRACE BRACE and time to Reignite, Refocus, Redesign and Reengineer our global tourism industry. In the immediate recovery the global tourism industry has **several key preconditions** that need to be observed in order to #ReigniteTourism.

- **People and health first.** We need to ensure that the health of our guests, employees, local population in the three regions of the tourism system is safeguarded at all costs. The risks will cost dearly in human life and misery, if not all appropriate measures are taken and businesses rush to tourism for short-term economic gain. In any case, the economic benefit will be wiped out by the cost of health care and compensations as well as the damage in reputation if this is not observed with long term negative effects.

- **Holistic care for customers, staff, local populations.** At this time of crisis, we need to engage the entire ecosystem to address the needs of our communities holistically and with solidarity. It is this holistic approach that can help deal with the disease, look after our communities and reignite our industry. This may be beyond our immediate areas of activity and may extend to acts of kindness to our extended communities.
- **Hygiene and cleanliness processes** need to be reengineered looking at all eventuality and engaging every single person in the value chain. This starts from travellers that need to understand their own responsibility and every single person in our teams and communities. This is a collective responsibility towards all members of the value chain. It simply cannot be the responsibility of a single entity. Public health and safety training

in the new conditions should include customers, staff, suppliers and all members of the ecosystem, with simple implementable instructions. We should also provide basic medical protection equipment such as masks, gloves, sanitizers as well as distribute sanitation amenities to passengers or in rooms. Although there is space for certification this should not be instead of alertness and constant reinforcement. It is not the badge that will protect us ... but the thorough and continuous implementation of the measure.

- **Redesigning the tourism facilities** may include de-densification, making little spaces and streets one way; eliminating spaces that cannot be supported, pre-determining and reducing capacity; marking spots to social distance, redesigning queuing systems. Perhaps markings on the floors, separations

and different furniture may be required. We need to do this dynamically and observe flows, reactions and impacts to address all issues in real time.

- **Reengineer service process** to address hygiene and cleanliness, ensure the relevant equipment and trained personnel are available to satisfy the new requirements; reassure and empower guests to be a central part of the disease defence mechanism. It is business as un-usual and new protocols need to be drawn dynamically and in real time.
- **Boosting health systems** to make sure that they can deal with the extra requirements emerging from the flow of tourists. This means that health structures should be on a 24-hour alert and have the health care professionals and the equipment required to address issues.



The capacity of the health system should drive the ability of the tourism sector to operate.

- **Business model** As a result of the required changes and particularly the de-densification and the neutralisation, there are significant changes to the business model for tourism organisations. Not only they will need to reduce their capacity but the cost of servicing will increase due to the additional requirements. Tourism organisations will need to re-budget their operations, redesign their pricing strategies and perhaps refocus on their operational procedures and increased costs. This at the same time that tour operators and travellers will be pressuring for lower prices. Smart solutions will need to address cost elements and redesign pricing and service principles.

- **Booking conditions, flexible cancelations, refunds, vouchers** are on top of the agenda of travellers. Organisations need to take measures to reassure consumers that they will be supported. Flexible cancelations and refunds are a key strategy to gain consumer confidence. Vouchers can only be used when consumers are happy to do so and are supported by guarantees and insurance. They should be used carefully if organisations would like to maintain their reputation and perhaps avoid law suits.

- **Relationships, Online Engagement and Social Media**

Strategies will enable organisations to engage closely with existing and future customers and support them during this difficult period. Messages and discussions should refrain from hard sell and advertising. They should focus on solidarity, dreaming of future travel and reassuring that travel activities are safe through

sharing measures and real time conditions. Relationships are key in this period and loyalty clubs should be used extensively to bring tourism organisations and destinations closer to their consumers.

- **Smart methodologies and techniques** Technology brings a range of smart tools to support us. COVID-19 has accelerated the use of digital tools and therefore travellers will be more familiar with applications and digital support mechanisms. Processes need to be redesigned to include touchless check-ins, check-outs, door locks and other service elements as well as to redesign the very essence of tourism, human touch. Smart techniques and methodologies will enable us to operate differently, remotely and more safely. On some occasions, robots may be used, especially for getting close and serve infected travellers.

The COVID-19 war that we are fighting will have many casualties I am afraid. Humanity should prevail to save human life and despair. The economy and industry will sooner or later recover to the new reality and that new reality will offer opportunities for those who can see the future first and prepare services and products that can provide value to all stakeholders. The trick is to understand this new reality early enough and Reignite, Refocus, Redesign and Reengineer our future.

BRACE BRACE BRACE and time to Reignite, Refocus, Redesign and Reengineer our global tourism industry.

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Season 21

Roadmap
to recovery

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