



# Shifting Dynamics: The International Order in a Post-Pandemic World

1<sup>st</sup> - 2<sup>nd</sup> of December | 2020

## A World Without Travel:

The Impact of Pandemic-Related  
Technological Adaptations on the  
Future of Industry



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# A World Without Travel: The Impact of Pandemic-Related Technological Adaptations on the Future of Industry



- The global tourism industry has been severely impacted by the COVID-19 pandemic. Tourism is a labour intensive sector, a leading source of employment and job creation, providing a high volume of jobs for low and high skilled workers, as well as for many seasonal, part time and temporary workers. With the restrictions on international travel, the impact on the tourism industry has been overwhelming.
- Domestic tourism has also been severely impacted by containment measures but it is expected to recover more quickly. It offers the main hope for driving recovery in the sector.
- The hospitality industry as well as corporate travel will see the rise of hybrid models as has been already witnessed with the advancement of the contactless experience, however, many consumers will still welcome the human touch.
- The hotel industry will see a dynamic growing demand for special tailor-made solutions beyond mass tourism. Personalised products and services that answer individual needs are going to be the key to the future.
- The increasing use of biometric screening and digital health passes are among the technologies travellers can expect to encounter as international travel resumes.
- Global collaboration with harmonised guidelines are vital for the future of the travel and tourism industry in an effort to restore confidence among travellers.
- The future of travel depends on how efficient vaccine is distributed, however, building trust is the key to the future of travel and public and private collaboration are of essence.

## Summary of the Session

**T**he panel titled “A World Without Travel: The Impact of Pandemic-Related Technological Adaptations on the Future of Industry” discussed the impact of the disruption to international travel on a variety of sectors and on the speed and direction of technological innovation.

Julián Guerrero Orozco, Colombia’s Vice Minister of Tourism, stated that the tourism and hospitality industry have been severely affected by the lack of international travel and that the sectors that are able to adapt and adjust to attend to customer needs will be better prepared to handle the emerging new normal. He also added that the sectors that have thrived this year are those that have been digitally focused.

CEO of Radisson Hotel Group, Federico J. González highlighted that digital health passes or vaccine requirements, temperature checks, biometric screenings will be part of the future of hotel stays. He added that the hotel industry will adopt mobile technology and the future of the hospitality management industry will be shaped by the seamless integration of technology.

Tony Wheeler, the Co-founder of Lonely Planet, emphasised that post-pandemic travel will witness many changes amid numerous restrictions, the coronavirus vaccine could become mandatory and passengers will consequently be required to have proof of vaccination before being allowed to fly. He highlighted that technological innovation would bring major upheavals. With remote work, people will no longer be as tied down to location and therefore will have more flexibility regarding where they choose to live.

Bulut Bağcı, President of World Tourism Forum Institute stressed that while shutting borders is

easy, it is difficult to get the system back up and operating again. He also raised concerns that if digital passports or vaccination certificates are to be made mandatory, it will be easy for some countries like Germany, Turkey or Columbia, however, others will find it more challenging.

The Head of Aviation, Travel and Tourism Industries at the World Economic Forum, Lauren Uppink Calderwood, stated that governments need to move from risk avoidance to risk mitigation to reduce risk to a level that is comfortable and that protects the public health of citizens. She also emphasised that digital health passes will likely be implemented and will enable sharing the required information regarding vaccination, etc. without necessarily having to share any personal information.

Tom Lowry, editor-in-chief of Skift, stated that corporate travel has been one of the hardest-hit sectors during the COVID-19 outbreak. The lack of business travel has had a ripple effect across the airline and the hotel industries. At the same time, the COVID-19 crisis has impacted the speed and direction of technological innovation. Many businesses have adapted to the trend of remote working and will continue to retain these changes even after the travel restrictions are lifted. The way contactless technology has been implemented is like a silver lining to the pandemic in terms of technological advancement.

Tom Jenkins, CEO of the European Tourism Association (ETOA), emphasized that the virus itself has had tragic impact but stressed that the measures which have been put in place by governments in response to the virus have also been devastating. He further added that in the post-pandemic world, one of the highest priorities of the European Union will be to reassert the Schengen area as a free travel zone.

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# Julián Guerrero Orozco's Highlights



## Vice Minister of Tourism, Colombia

Julián Guerrero Orozco, Colombia's Vice Minister of Tourism, is a lawyer from the Javeriana University of Bogotá. He has a master's degree in international relations from the London School of Economics and studied film and photography at the American University in the United States. He has been a university professor of law, political science and international relations. In addition, he has worked in the public sector for more than 20 years. He has dedicated himself to the development of projects for the conservation of nature in Colombia and in Tanzania. Since 2012 he has been a member of The Linnean Society of London, the oldest natural history society on the planet. From the Vice Ministry of Tourism, he hopes to contribute to the development of the sector, directing it towards formalisation, quality and sustainability.

- ” “Tourism and the hospitality industry have been severely impacted by the lack of international travel. The industry is a contributor of approximately 10% of the world's GDP as well as 1 in 10 employment in the world. As it is a service, labour intensive industry, the impact has been huge.”
- ” “The industries that are able to adapt, to re-imagine what they can do, to change their type of products, and have a greater flexibility to attend to their customers' need, are the ones that are better prepared to handle this new normal and to come into a really good situation in the future.”
- ” “The sectors that have thrived this year are the ones that have been digitally focused. For tourism, for example everything that has to do with bio safety measures and the use of technology. In addition, there are many tools like statistics or market analysis that tourism companies can use to be better positioned in the recovery stage; we are moving from the forecast to the nowcast to be able to have information in real time to make good analysis rightly on the markets.”
- ” “This pandemic is a huge opportunity to rethink, to reactivate, to re-imagine the travel and tourism sector, to have a better type of tourism than the one we had before, and of course the issue of sustainability becomes a very central point in this effort to reactivate.”
- ” “As other countries did, Columbia adopted biosafety protocols that were compulsory for all the tourism sectors to adopt. But we compliment that with a voluntary stamp - the check-in certified stamp - using the conformity evaluation organism developed by a third party, to make sure that the protocols adopted by the government were being put in place in the correct manner.”
- ” “The keyword for the recovery phase is trust. We can build trust in every single decision we make as a government, and the private sector has to contribute to building that trust that we need in order to incentivise demand.”
- ” “I think that Latin America and Columbia are well positioned to attract the type of post-pandemic tourism that will be popular like nature travel, adventure travel, in which there is less contact with a high number of people.”
- ” “Tourism in Columbia is seeing a rebound and is starting to be reactivated more speedily. Of course, not to the extent that we would want, but more speedily with regards to travel domestically. Several decisions have been put in place. We had to strengthen the budget for promotion, for marketing, and focused more on the domestic campaign. We are seeing a good trend, but this is not the time to relax biosafety measures. On the contrary we need to have more control, outdoor protection, etc. to make sure that we don't have the need to go back to measures that limit the mobility of people.”
- ” “One of the key elements of the future of tourism is sustainability and we need to enhance that discussion that is being held in different forums like the World Economic Forum, WTO, and the WTTC. Sustainability might be quite an important criteria for future travellers. It is an increasingly important issue that countries need to address, a crucial aspect of the competitiveness of different destinations, and I'm sure that the ones that invest in sustainability are better positioned to attract travellers from around the world.”

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# Federico J. González's Highlights



## CEO, Radisson Hotel Group

Federico J. González is the CEO of Radisson Hotel Group (RHG). Federico has extensive global executive leadership experience in the hospitality, leisure and fast-moving consumer goods (FMCG) sectors. Prior to joining Radisson Hotel Group, he was Chief Executive Officer of NH Hotel Group and as Deputy General Manager of Disneyland Paris. A respected marketer and hotelier, González has written three books: *Living and Working Abroad*; *How to Live and Work with Portuguese*; and *How to succeed in doing business the Swedish way*. As a global leader, Federico's personal mission is to motivate and energize large organizations to be more ambitious – in profitability, purpose and people – through respect for diversity of thoughts, culture, gender, experience and beliefs. He majored in Economics at the Universidad Complutense de Madrid and received a Masters of International Trade and Finance from the École Supérieure de Commerce de Paris.

- ” “The impact on tourism has been very strong across all the segments in the industry but the sectors that have done best have been those destinations reachable by car. Many business travellers and tourists have replaced international travel by local travel. Segments like mid-scale service apartments, suburban, those that are outside of big towns have had actually a better performance than big urban hotels, or big tourist destinations.”
- ” “Digital health passes or vaccine requirements, temperature checks, biometric screenings will be part of the future for hotel stays. There will be nothing that is extremely different to what is required to go to destinations. The hotel, in the end, is only one and a small piece of the travel industry. Destinations in the future are going to have to prove to the world that not only is the hotel is safe, but that the destination itself is well coordinated and well managed.”
- ” “Turkey did a phenomenal job not only in trying to do the right thing, but actually to communicate with the right targets. We are very confident with all the measures and the approach that Turkey had. That is why, for example, in our five year plan, we have reinforced our bet in Turkey and we want to grow even more than we have today. And I think more and more operators will do the same with those countries and destinations that share concrete measures and communicate those measures in the proper way to the key stakeholders.”
- ” “One of the big benefits of this crisis is the level of quality and the level of safety standards that have developed all over the world. The protocols that have been put in place, the protocols of the World Travel and Tourism Council, will not only prevent the spread of COVID-19 but prevent many other diseases and make the health and the safety standard in the hotels much better.”
- ” “Even though the mobile phone is becoming a key component in delivering a safe contactless experience, I don't think people will lose jobs. Possibly the nature of the jobs will change. People working at hotels are asked to be more flexible and to bring different needs at different times to consumers.”
- ” “I think digital transformation is setting the trend for the hospitality sector. Mobile technology or the use of mobile apps will be adopted by the hotel industry offering guests a seamless experience. Many consumers will welcome the contactless experience but many will still want human contact; so the key for the future of the hotel industry, is a much higher level of individualisation, tailor made solutions and an increased complexity and flexibility in the execution of solutions.”
- ” “For the hospitality industry, the speed of technological innovation and the ease of connectivity have acted as an accelerator for the introduction of what we call hybrid solutions or hybrid rooms. With the equipment installed, the hotel room can also be used as an office. I don't think that it will kill or replace many meetings, but it will make many of the meetings have a larger reach in terms of numbers.”
- ” “I think it is crucial that global and regional institutions agree on common protocols, common standard and rules that are science based for the hotel industry to adopt.”

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# Tom Jenkins's Highlights



## CEO, European Tourism Association (ETOA)

Tom Jenkins is the CEO of the European Tourism Association (ETOA), an organisation dedicated to promoting fair business environments in European tourism. ETOA represents over 1,200 tour operators and suppliers from more than 50 countries that deliver more than €12 billions of business annually within Europe. Mr. Jenkins also regularly contributes to a variety of media, including the BBC, GMTV, CNN, & CNBC. Before taking the reins at ETOA, Mr Jenkins held a number of management positions at American Express. He also spent six years as a tour guide for American Express and Thomas Cook, and helped launch Galleries Magazine. Mr. Jenkins graduated from Bristol University with a BA in English & History. He also conducted two years of post-graduate research at London University's Courtauld Institute.

” “The virus itself has obviously had a tragic impact, but the measures which have been put in place [by governments] have [also] been devastating. I think the current situation is genuinely abnormal. We are looking at a situation which is created partly by the virus and partly by the government's response to the virus.”

” “I think with a vaccine, we will see a post-COVID situation and COVID-19 will be a thing of the past. I think if we have adapted to what people are calling the new normal, which is the situation at the present, we have adapted to the wrong environment, since the future will be looking at something which will not be identical to the situation we had before the pandemic, but it won't be radically different because people's motivation to travel won't change.”

” “Our analysis, in the short term, is that the people who have been most affected by the economic downturn are not the target market for European vacations, so we are quite confident that the demand and the financial capacity to travel to Europe are there to remain robust.”

” “I think the short term question really is how far the supply line within Europe is going to be able to meet the demand. I am not saying that the demand is going to wildly outstrip supply at any time shortly but the state of the service economy within Europe as it emerges from what is effectively a coma is an interesting question.”

” “I think in the post-pandemic world, one of the first things that European Union is going to be really keen on doing is reasserting the Schengen area as a free travel zone. This will be one of the first things that will come into play and will certainly be very high on their priorities.”

” “There is a huge pent-up demand for people to travel. It is extraordinary that sectors which in theory, should be highly resistant to people coming on board during the coronavirus pandemic like coach tourism, domestic coach tourism within Europe, take off whenever they are allowed to take off. So there is huge demand for tourism within Europe. Thus, I think we will see a bounce back, certainly in terms of domestic and into European travel quite quickly.”

” “I think reassurance is going to be important and I think with a vaccine, that reassurance will exist. I think what we shouldn't be doing is fighting our last battle. We need to take initiative to try and reassert confidence and get things going again.”

” “One thing is for certain, it is not unusual to have a vaccine before travelling. Any of us who go to equatorial regions know that you really have to have a vaccine before you travel. And this is not unusual at all. So I think this will be part of the new normal. But beyond that, I can't see a major change either in travel patterns or people's desires.”

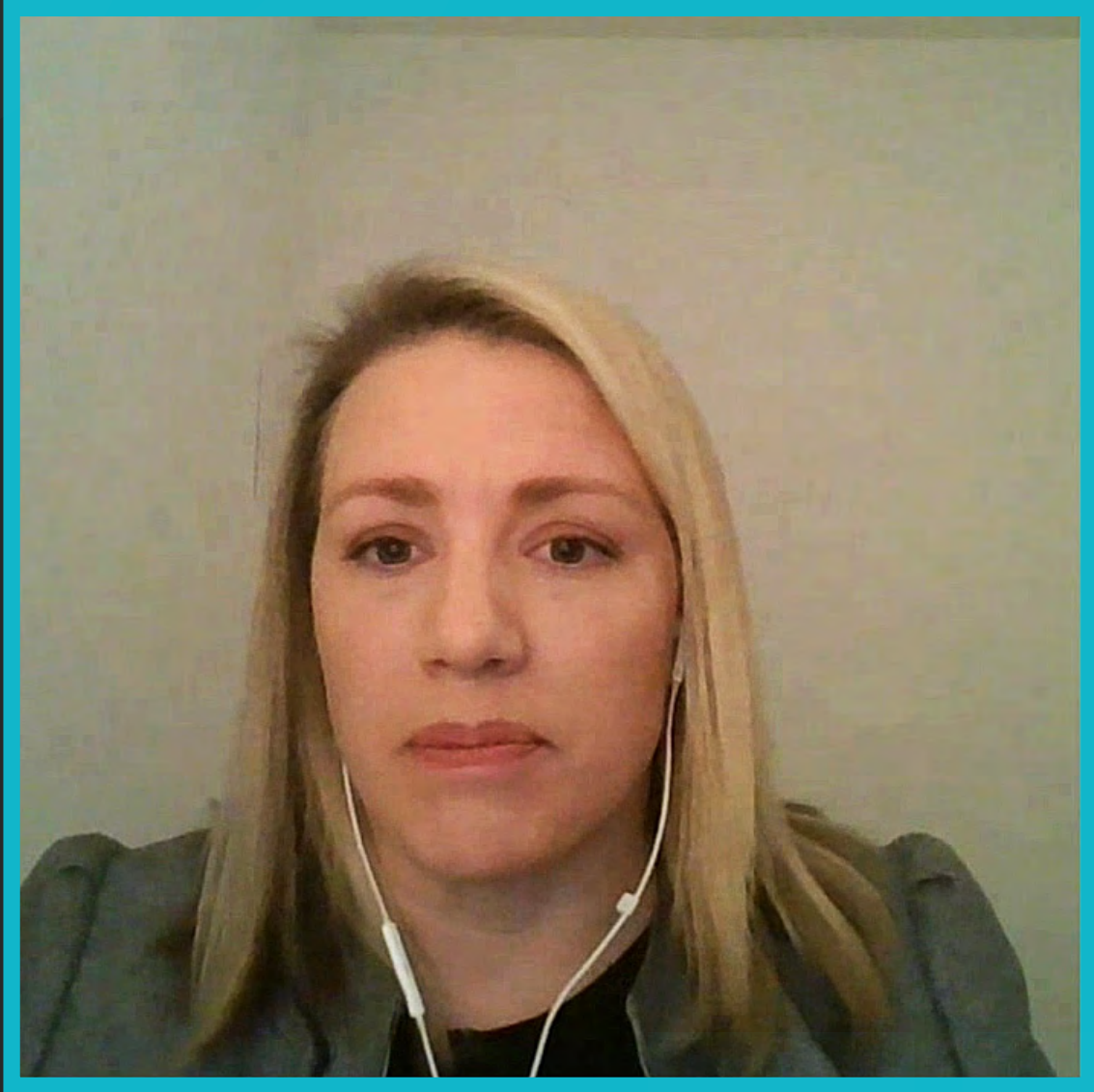
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***We are looking at a situation which is created partly by the virus and partly by the government's response to the virus.***

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# Lauren Uppink Calderwood's Highlights



## Head of Aviation, Travel and Tourism Industries at the World Economic Forum

Lauren Uppink Calderwood is Head of Aviation, Travel and Tourism at the World Economic Forum. She drives thought leadership, industry strategy and action on sustainability and climate change, travel security, pandemic recovery and the impact of technology on the sector. Uppink Calderwood is co-author of several World Economic Forum publications including the flagship Travel and Tourism Competitiveness Report and represents the World Economic Forum on ICAO, IATA and WTTC technical and advisory taskforces. She holds an MPhil in Development Policy and Practice from the University of Cape Town Mandela School of Government and is a fellow of both the World Economic Forum Global Leadership Fellowship and Young African Leadership Initiative.

- ” “Before the pandemic, the aviation industry was experiencing extreme growth and we were expecting international arrivals to reach 1.8 billion by 2030. The original forecast was 1.4 billion for 2020, and we met that in 2018. We have only seen growth in terms of numbers and people moving across the world and with that is access to the benefits that the aviation delivers in terms of jobs created through travel and tourism but also indirect economic development that is a result of travel and tourism.”
- ” “In comparison to many other sectors, the aviation industry has actually got a small carbon footprint. But one thing that this pandemic has served to do is actually accelerate the efforts of the industry across the value chain to make changes around carbon intensity, adoption of sustainable aviation fuels, and we have actually had renewed interest in energy from our stakeholders to do that.”
- ” “What is great is that stakeholders across the sector, from the international regulators to governments, member states to carriers, to airports, are all working very closely together on the take-off guidelines and working very closely in collaboration with the World Health Organisation and chief medical officers across the globe to make sure that as we open travel again, it is done in a way that is not a risk to public health.”
- ” “I think no one knows yet who has had the right approach, or who has the exact solution but we really believe that governments in particular need to move from risk avoidance to risk mitigation. There is no zero risk and there are ways that you can reduce the risk to a level that is comfortable and protects the public health of citizens.”
- ” “Digital credentials or health passes are certainly here to stay. It enables travellers to share proof of information about yourself without handing over your personal data. It says that ‘I meet the requirements for this flight or entry into a country and I am not passing as a traveller any of my information on’ and if that is the way it develops, then I think that it is on the same trend that has been happening with digital identity, with biometrics, with proving information about yourself, as you have to do for the visa requirements to enter a country.”
- ” “Aviation and travelling by plane is one of the safest ways to travel and has always been because of the safety accreditation and certification rules that are in place globally. The study that came out by many of the manufacturers showed that there is a very low risk of transmission of COVID-19 in aircraft and is not due to any increase to new procedures or, filtering systems, but actually through their existing system.”
- ” “I think an important thing to remember is, while technology is an enabler of many things, it’s not the only thing that has to be unlocked for travel to re-open and for people to feel safe. One of the biggest challenges that we’re seeing is that travellers are less fearful now, but actually more frustrated. And the reason that many travellers are not travelling, especially internationally, is because they’re worried about being quarantined unexpectedly or not being able to get trapped somewhere.”
- ” “The technology that’s being developed for health credentials is a key piece to unlock travel but it can’t be solved by technology alone. It requires an enormous amount of global coordination of public and private interaction and cohesion so that the private sector, industry and governments are all speaking the same language and are able to provide that seamless, experience for travellers.”

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# Tony Wheeler's Highlights



## Co-founder, Lonely Planet

An Asia 'hippie trail' trek in 1972 led to the creation of Lonely Planet and the New York Times to describe Tony as "the trailblazing patron saint of the world's backpackers and adventure travellers." Since Tony left Lonely Planet he has been involved with the Planet Wheeler Foundation's education and health projects in the developing world, Global Heritage Fund's archaeology sites and, until the coronavirus pandemic interrupted things, lots of travel to keep him busy.

” I think that there isn't a new normal for the global tourism industry to adapt for, since there are all sorts of restrictions on our approach to travel. But I think that the future is going to be radically different with lots of changes that are going to stick around for a long time after the pandemic is over, and lots of restrictions that will become part of everyday life, like proving to be healthy to travel or that we have been vaccinated.”

” There has been so much said about how we have been concerned about climate change and the effect of travel, but you couldn't change it, that was the way it was. But, suddenly we found, we can change it, we can shut everything down and suddenly start a new world.”

” With the fact that we can do so much more of our business meetings on the internet, I think there is going to be major upheavals, people don't need to be living in the place they were before. Why live in the middle of the city if you can live out in a village in the country somewhere and still meet just as if you were in the middle of the city?”

” I think there is going to be lots of changes that we really haven't anticipated yet and they are going to be bigger changes than we assumed.”

” For the travel guide book publisher companies, I think it's going to be very difficult for a while to know what is happening, it is hard to write about places if you don't know when they're going to be reopening, or if they're going to be back in action by the time the new edition of the guidebook comes out.”

” I think we are going to see a lot more of local tourism, people wanting to drive rather than to fly. Another sort of local tourism that will develop is walking tourism, where you don't have to worry about interacting with large crowds, you are off by yourself or have little isolation.”

” One of the things that concerned me during this whole pandemic is regions of the world which may not necessarily have been hit so badly by the pandemic or have recovered to a large degree, like South Africa is a case, but the tourists stopped going there. And, it has had a huge impact economically.”

” Just before the pandemic hit, the local population of some destinations like New Zealand, Barcelona or Venice were almost overwhelmed by the number of tourists. But now with no visitors, that side of the picture isn't good either. The question is when we restart, what would be the best way to approach this after the pandemic.”

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***I think there is going to be lots of changes that we really haven't anticipated yet and [they] are going to be bigger changes than we thought were going to happen.***

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# Tom Lowry's Highlights



## Editor in Chief, Skift

Tom Lowry is the editor-in-chief of Skift responsible for the global editorial strategy for the premier media brand covering the business of travel. His oversight focuses on news, analysis, and data, through mobile, desktop, podcasts, video, social, print publications, and two daily newsletters. He has also managed the successful editorial integration of two acquisitions, the Airline Weekly subscription product, and EventMB, the leading resource for the events industry. What's more, Lowry works closely with a subscription research division and plays a key role in a global conference business. Previously, Lowry worked as an editor and reporter for CNBC, Business Week, The Daily and USA Today, and taught business journalism at the Craig Newmark Graduate School of Journalism at CUNY.

- ” “I think that corporate travel has been one of the hardest-hit sectors by the pandemic, because of the ripple effect, sort of standstill, not only on business itself but on the airline and hotel industries. At the same time, corporate travel has been one of the most resilient sectors because of the technological innovation that has been implemented.
- ” “I think we are going to see a little bit of a hybrid model with corporate business going forward. Many companies have been adopting virtual platforms to be able to do business making it that you don't need to get on an airplane to conduct a meeting while others are arguing that you have to be there in person to do business.”
- ” “We have done in 4 months what probably would have taken 10 years. The speed of the technological innovation and adaptation has been phenomenal, the way contactless technology has been implemented in airports and in hotels is like a silver lining to the pandemic in terms of technological advancements.”
- ” “I think in terms of pent-up demand, some of the expectations are a little overblown and it all comes down to the sort of travellers there will be and consumer confidence. About digital health passes, there is a sort of a double edged sword in terms of the confidence of travellers; will travellers be deterred by the fact that they have to share information, or will there be kind of renewed confidence knowing that the person next to you had had the same sort of health screening that you have had?”
- ” “I think that consumer confidence comes from obviously national leadership on some of these issues, as well as sort of how well the vaccine is distributed and how efficient that distribution is.”
- ” “Following the Aviation Forum two weeks ago, I can say that there is a sort of measured optimism among the airline executives, and that there are no expectations that even when there is a vaccine, the vaccine will be this panacea and we will see a return to sort of robust travel by the end of 2021. Some airline executives don't expect to see things return to pre-pandemic levels until 2025.”
- ” “How important is the digital health pass to people as being sort of necessary to be able to travel? I saw a study over the summer that said that people that were nervous about traveling that finally got on a plane and travelled, 80% of those people said they would travel again, so it is just sort of like breaking through those initial fears. I think a lot will be determined once we get the vaccine out and people feel comfortable with what they are seeing in terms of others traveling.”
- ” “The questions asked is whether 'under tourism' is going to be the new 'over tourism'. As we are moving towards domestic tourism, I think there are real opportunities in local tourism. We have been seeing many small business owners who are really doing inspiring, innovative things in promoting their local cities and towns.”

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# Bulut Bağcı's Highlights



## President, World Tourism Forum Institute

Bulut Bağcı is the founder and President of the Executive Board of the World Tourism Forum. Mr. Bağcı graduated from the Tourism Administration department at Boğaziçi University in 2009. He has more than 8 years of experience working in both national and international non-governmental organisations and over 10 years of experience in the tourism industry. He is also the founder and CEO of Linkline Event and World Tourism Development. Mr. Bağcı started the World Tourism Forum in 2014, which, under the auspices of numerous countries and governments, brings together world tourism leaders and representatives at the forefront of global industry issues and trends.

”My call to the Presidents, the Head of States and the Ministers is to give huge attention when closing the borders, because closing the borders is easy but it is too hard to get it back up and operate the system again.”

”The global cost of the COVID-19 pandemic is 3 trillion dollars. Again in 2021, the industry will suffer but our aim is to reduce this number to 1 trillion dollar. Our expectation for 2022, all the industries are going to recover with the jump of 25% if we compare the numbers with 2019 before the pandemic.”

”Germany, Turkey, and South Korea have really stood out in regards to their management of this pandemic, and on tourism business as well. Some countries, instead of shutting down, developed hotel manuals, aviation manuals, airport manuals, with protocols to manage and operate the system. Some of the manuals and protocols have been announced by WTCC and the World Economic Forum.”

”What I observe is that Digital passport is already applicable for some countries but my question is how will it be implemented in other parts of the world, how will the practices be carried out?”

”Turkey managed the pandemic very well. It created a safe zone, like Antalya, the coastal area of Turkey. Then they gave huge education and training to the staff, they followed the COVID-19 protocols determined by the World Health Organisation and UNWTO, in addition to the inspections from the Ministry of Tourism. The

change of Turkey is that all tourism were coming from just one destination source which was easy to manage.”

”Tourism is not a luxury but a must. It is an experience, a feeling, and socialisation. With technology, it is easy to access information about a destination via Google or YouTube but tourism is like a feeling, like an experience.”

”I think that the future of tourism is directly related to governments. People are ready to travel, hotels are ready to host, taxi drivers are ready to drive but governments need to focus on how to organise airports standards and protocols for tourists.”

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***Tourism is not a luxury but a must. It is an experience, a feeling, and socialisation. With technology, it is easy to access information about a destination via Google or YouTube but tourism is like a feeling, like an experience.***

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