

Eurostat Podcast: Stats in a Wrap

Episode 1: How do we travel in a world changed by COVID?

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Stats in a Wrap, the new podcast series from Eurostat.

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Welcome to the first episode of Stats in a Wrap. The new podcast series from Eurostat, the Statistical Office of the European Union. With this series, we want to immerse ourselves in the world of statistics and to pick its most delicious morsels and striking flavours to give you, our listeners, insights into the unexpected, the quirky and the downright peculiar perspectives that only the numbers can reveal. I'm Jonathan Elliott, your host for this episode. And in today's wrap, my guests and I are going to be slicing and dicing the stats to find out exactly what happened to tourism in Europe when it was hit by the COVID pandemic.

So we're lucky to have Christophe Demunter from Eurostat, who can give us all the numbers on our old and new ways of travelling. And joining him we are equally lucky to have Ulf Sonntag from NIT, a tourism research institute in Germany.

Gentlemen, welcome to Stats in a Wrap. Before we dive into the numbers and talk stats, I think we should better just talk a little bit about what Eurostat is. Christophe?

Christophe Demunter

Eurostat is the statistical office of the European Union and as such we're a part of European Commission. And our role is to present, well, high quality data that is independent and objective.

In general, a lot of the work is done by the statistical offices of the different member states, like conducting the surveys, and our role is mainly to coordinate, to make sure that all countries have compiled the data in a similar way, so that we have harmonised data that we can compare across countries.

Because for users like Ulf who, for instance, when he wants to compare evolutions in Germany with evolutions in competing markets, of course, it's essential that the data is actually comparable. We also add the European layer to the national data - the EU aggregates, as we call it.

Jonathan Elliott

Right, yes. And just to clarify, aggregates or aggregation is putting a number of statistics into one single figure, so it's often things like averages or totals. So Christoph, can you now tell us a little bit about the stats and how they are put together, how they are actually produced?

Christophe Demunter

There are two main sources: One is business surveys from operators in the hospitality sector, so it's basically monthly surveys with hotels, campsites and so on to produce

these monthly data on nights spend. And on the other hand, we also have household surveys where people like you and me can be asked by the statistical office about trips they made in the reference period prior to the interview. Where did you go? How long did you stay? What mode of transport did you use? What type of accommodation did you book? How much did you spend?

Because that's also interesting information, of course. So, these are the main sources. Next to that we also try to look into more innovative sources. We have some projects looking into using mobile phone data. Since a few years we get data directly from some of the major accommodation platforms, which allow us to cover that segment.

So it's a mixture of sources with, as I said, a big role for the statistical offices in the member states and then some coordination on our side.

Jonathan Elliott

OK, so thanks, Christophe. That's the work of Eurostat. Travel activity in Europe during the period in question over the last - what we're talking about - roughly two years, roughly two years has changed. Did change. Was reduced, obviously, but travel didn't entirely stop either.

So just talk us through some of the key features statistically that we can talk about with any safety about those two years. Christophe, what happened in Europe in terms of tourism?

Christophe Demunter

I mean, there're people who like travelling, there're people who don't like travelling. I think those who like travelling, they just try to travel anyway, regardless of the restrictions. They just, let's say, adapted their travel aspirations, to what was possible.

We saw the same like ten years ago in the times of the financial crisis that people kept on travelling. I mean, you have a number of days of annual leave per year and you want to use it for travelling.

And because of budget constraints, people travelled closer to home, stayed maybe in cheaper accommodation options. Under the pandemic, we saw the same: people just choose destinations closer to home, basically because the borders were closed, because they wanted to be closer to home in case the pandemic suddenly became more dramatic so they could be faster at home.

When we look at the data. As I said, not everybody is travelling. Before the pandemic, about two thirds of Europeans were travelling, which means they make at least one trip with an overnight stay throughout the given year.

In 2020, this dropped to just below half of the people. So, there were a number of people who did not travel. Was it because of fear? I mean, we don't always know. Things we saw is that domestic tourism became more important than international tourism.

And so the drops in domestic tourism, I mean, there was drops everywhere, but the drops in domestic tourism were less dramatic than the drops in international tourists,

for instance, in hotels the number of nights spent was cut in half in 2020 compared to 2019, the last year before the pandemic.

But this cut in half was actually -70% for foreign guests and only -34% for domestic guests. So, it's mainly the foreigners who no longer came.

Jonathan Elliott

Absolutely. Ulf, can you just tell me a little bit about from your perspective and your clients' perspective, what were the key features in the last two years for you? Was it destination change? Was it method of transport?

Ulf Sonntag

We saw that the drop of participation wherever we looked, and so it was less trips, less people travelling and travelling in a different way. But we saw that different kinds of destinations and different kinds of travel were differently affected, so people tended to stay within their own country.

They tended to go with a car. They also - if they went - they tended to stay a little bit longer. So, we saw really kind of different patterns on the one hand side, but on the other hand side, the desire actually to try as much as possible to keep up patterns that you were used to. As soon as hotels were allowed to cater for tourists again or for leisure tourists again, demand picked up almost at the same time.

Voice from the street

I definitely use other terms of transportation more often, for instance I usually take the train – it's faster, especially to go the Netherlands, to go to Paris and also to the south...

Jonathan Elliott

Tell us what we know about modes of transport and whether people, you know, whether flights were up or down - I mean, they were down, obviously - and whether we just saw more car use or whether travel tended to default to modes where people have more control.

So, you know, a cancelled flight means you're not going anywhere, but no one can cancel your car, right? So, what do we know about the modes of transport during those two years?

Christophe Demunter

It's possible that people prefer to be in like in a car bubble with their own family rather than in a plane with lots of other people. But there are also, of course, the pure facts. If you stay closer to home for your destinations, it's less likely that you need a plane to go there. When you go to the next door region, you can go by car, by train, while if you were used to go to the Canary Islands, you can only go by plane. So, it's what we see in the figures that, of course, airline passenger transport dropped really heavily, it was about -75% in in 2020, which is much stronger than the drop in nights spent in hotels, which was -50%, so proportionately, airline transport suffered more.

Voice from the street

Because of the pandemic I think we discovered a lot more local areas to explore, to which we probably won't go normally. In terms of where we would go after the

pandemic, it's to say, we booked Berlin before the pandemic, couldn't go because of the pandemic and we are here now, so yeah, there is some change...

Jonathan Elliott

Ulf, when we were talking about destinations, you mentioned a little bit about how your research showed that people tended to go more towards coastal destinations or perhaps mountains and rural areas, and you could kind of understand why that might be.

And cities saw quite a large drop in visitor numbers. Talking to your clients and in your own experience, can you sort of say why you think that was?

Ulf Sonntag

When you look in the cities, you have a high share of business trips and you have a high share of international visitors. And what we saw is that business travel and that international travel was most affected. And also because of the, let's say, being closer with other people within a city and also with having basically mostly hotels to stay at where you also are likely to meet other people and also where it's more convenient to go with public transport, where you also meet other people. This feeling in the last two years that you feel safer when you have more space around you.

That was something that the holiday makers and the short breakers also affected, and which in the end was basically also one of the reasons why – yeah - areas where you have space around you and where it's more easy, maybe to stay in a holiday apartment or in a holiday house rather than in a hotel that those were less affected.

Jonathan Elliott

Absolutely. I mean, and activities within cities tend to be more crowd based, perhaps you tend to see more things like entertainment, socialising, restaurants, possibly clubs, that sort of thing. Those things tend to sort of not be very good to be -

They're not very compatible with social distancing, which was obviously required of us quite a lot of the time.

Ulf Sonntag

These kinds of entertainment in the cities, they were often closed. So it was, museums were closed, restaurants were closed. So even if you were able to go to the cities and stay there, many of the attractions were closed or with restricted access.

Jonathan Elliott

That's very interesting. From my own point of view, I went to London and I don't live in London. I went to visit London right in the heart of the lockdown, and it was the strangest place. I lived, I was brought up in London. I know it extremely well and I've never seen my home city look so weird ... Everything was shut down. Grass had not been cut. There were like wildernesses and there were no visitors and London is defined by its visitors.

It's like New York in that respect, it's the people who come in that make the place alive. Just looking at the north south divide - that's really interesting - I just saw some stats about how the different parts of Europe were impacted.

Ulf Sonntag

What we basically saw was that countries that are relying a lot on international visitors were most affected. So, in the south of Europe, a lot of sun seeking northern Europeans are expected in normal years and they could not travel or would not travel as in the years before. Because of the closed borders or the - let's say - the rules that came with border crossings. Bigger countries, they were likely to be less affected than smaller countries where you don't have this population in the country that could step in for the international visitors.

If you compare Spain with Malta, you see that in Spain to a certain extent, the local population could replace the international visitors. But if you look at Malta with only a couple of 100,000 inhabitants, you will not see this effect.

Jonathan Elliott

Christophe, what is your perspective on this.

Christophe Demunter

When we look at the regional data, you can see this. I mean, comparing the 2019 with 2020 figures, for instance, you can see on the map that the south colours differently than the north of the map. And it's simply because the south relies to quite an extent on foreign tourists who stayed away, while the North is relying less on foreign tourists.

And on top of that, many of the residents of those countries were not allowed to go to these southern destinations. So as an effect in some of the northern regions, northern Germany, the Netherlands, some of the areas of Sweden, we even saw positive figures for 2020.

Voice from the street

I have got to travel more. The pandemic has been a favour for me to travel, because if there had not been the pandemic there had not been the online classes, and if there would not have been the online classes I would not have had the privilege to travel, because then I would have to go about the classes.

Jonathan Elliott

Yeah, I wonder, Ulf, whether there was sort of regeneration effect of local tourism and the fact that people are finding new destinations, spending money in places and that suddenly places became attractive in the northern hemisphere or near where people normally live.

Ulf Sonntag

To consider your own country to go for a holiday, I think for some people, this was really like something new or at least something they haven't been doing for some time. So, there was this reexploring of your own country, first in looking for places to go and then eventually going.

On the other hand, what we saw is that people tried to stick or go to destinations where they had been in the past, even if it was the distant past. So, it was really more like a - let's say - not like a new discovery, but maybe more like a rediscovery.

Jonathan Elliott

That's fascinating. That's kind of like reassurance tourism, it's kind of almost heritage tourism: It's looking for something that's grounded. As I said we've seen that in the UK - and it makes sense - people are looking for something grounded and rooted. I'm just going to move on slightly now to look at the business and the employment side and the whole kind of fact that this is a massive, massive industry. What kinds of workers and jobs are we talking about when we're talking about those affected by the pandemic?

Ulf Sonntag

Let's say tourism wasn't - even before the pandemic - not the most attractive industry to work in. But on the other hand, it was also like, for many jobs, a quite a low skilled... so, the entry level to get into the industry was quite low.

I think we saw mostly that the low skilled work was directly affected, because they were laid off or they weren't reemployed when normally the season starts, so they had to move away from tourism into other sectors.

And I think for the low skilled jobs and also for the talent – like, the high talent jobs - tourism has shown that it is less secure than other sectors. Like, the industry now really sees that they will have a problem with staff in the future and on both levels - on the low skilled staff -because people went away into more secure jobs - but also in the, let's say, higher education.

Jonathan Elliott

Christophe, I wondered what your statistics tell us about labour markets and employment.

Christophe Demunter

The tourism labour market is quite different from the, let's say, the overall labour market. In a positive way there are many people who might have difficulties to find a job in other sectors who do get a chance in the tourism sector.

Also for young people: there is relatively more young people in tourism compared to the rest of the economy. Of course, there's more people with temporary contracts, there's more people with part-time contracts. There was a drop in in the tourism labour markets.

We see that employment figures dropped with about 15%, but this is relatively small compared to the drop in, for instance, the nights spent in hotels, which was 50%. So, let's say the activity levels, I mean, the outputs, the whole tourism dropped with 50%.

But the effects on employment were much lower. So, companies try to keep their staff and also because, at some point, we all thought that the pandemic could be over two months later - it's two years later now.

Voice from the street

So my travel habits changed a lot due to Covid. You always have to be aware of the pandemic, you always have to check the local policies, you always to take a test although you are vaccinated, yeah – it's really annoying.

Jonathan Elliott

So, let's talk about robot hotels. When we were doing our research, we came across a few innovations responding to the very understandable fears around the virus. And we came across the phenomenon of contactless tourism or "low touch, no touch" I think it's called, and obviously robot hotels. Yeah. So, Ulf?

Ulf Sonntag

So, for me, it really goes a little bit against the essence of travelling, but that's a personal feeling. On the other hand, it might be really - for some activities in hotels or in the tourism sector or in tourism services - it might be a solution, and I think we will see it at some point in the future.

Jonathan Elliott

Let's talk about long term changes to tourism. Ulf, we talked about the talent drain and the talent loss. Once a good, experienced chef changes career, it takes a while for that experience to be replaced. So, what has the pandemic done to perhaps the higher, more premium skills of the industry?

Ulf Sonntag

In the industry, I think we will have some long term trends that will affect also the demand on the long run. And this is, I think, on the one hand side, it's everything together with digital. So, the ways we communicate, the ways we will book, the ways we will look for holidays.

This will change. And maybe we will also see that we will have front runners in the industry, destinations or operators who invent something new or do it the best way, and then they will have a comparative advantage.

On the other hand, we see the megatrend of sustainability and now more and more the political will to change something.

Christophe Demunter

There may be some remaining effects of the pandemic as well in terms of travel preferences. I mean, people discover destinations that they would never have considered and what was a Plan B at the time - I mean - people actually liked it.

I don't think there are many people who completely hated the trips they made in 2020 and 2021. People just discovered that's closer to home, I mean, in neighbouring countries or in their own country. It is not always considered nice to take a long haul flight, I mean, people liked it to visit these destinations. So, everything together: it could be that some of the European destinations actually benefit in the long term from this, I mean, everybody having tasted this kind of destinations in the past two years.

Jonathan Elliott

I saw somewhere that holidays that favour, you know, togetherness, that people can build up their networks or take their families or their friends away, an opportunity to sort of recover from the loneliness of being in a bubble and lockdown, those sorts of holidays.

I think, Ulf, you are nodding now, I just wondered what you thought about that.

Ulf Sonntag

For Germany, we see exactly these kinds of travel motivations picking up. So, when it comes to relaxation, when it comes to spoiling yourself, when it comes to be together with your loved ones: this is really something that was always important, but has even increased in importance.

Jonathan Elliott

So skydiving holidays won't be coming back so quickly and retreats and being alone and that sort of stuff, where you could get away from people: they're not going to be so popular.

Christophe Demunter

Recovering from what you've called the loneliness, it's not necessarily about being in bigger bubbles with friends. It can also be that people just want to be like, just want to see people and lights again, not necessarily friends of theirs. So people might have missed, let's say, the crowds in city, the activity in the city. Since a few years, we are cooperating with Airbnb, booking.com, Expedia and TripAdvisor to share data with us. And in that data, we saw that during the pandemic the figures in cities dropped by 75% and more just for reasons that we can probably relate to: Not so easy to travel to foreign cities, to foreign capitals, fear of crowds... But people who like to go to cities, they may have terribly missed this to sit, I mean, to be in the crowd basically, just to be part of the crowd.

Jonathan Elliott

I remember the first French restaurant I went back into after a year of not being out of the house. And the sight of seeing other diners just feet away from me, enjoying themselves and laughing and eating was completely sensational.

It was, I mean, I was speechless, as I am now with the memory of it. It was the most wonderful sensation just to see other people around you enjoying yourself. Yes, I completely get that.

Voice from the street

What changed most in travelling due to Covid was the relaxation part. You are always really tense. When you get on a plane or just go to a supermarket or whatever, you always have in your mind that I can get infected and then my holiday is going to be ruined, because I am gonna lay in bed and hope that I don't die.

Jonathan Elliott

In the pandemic, my expectation would be that people would be motivated in their travel plans, mainly by anxieties about catching COVID. But I think from my research that actually it's more about cancellation or monetary loss. Just tell us about that.

Ulf Sonntag

This is exactly what we saw in our research when we asked for sentiment and for travel plans and for attitudes in travelling. When we look at the pandemic and what people told us about their travel plans and their intentions concerning travel, it's: they always wanted to travel.

They always had ideas on what they wanted to do and they always had concerns. But these concerns were not panic concerns, they were quite pragmatic concerns. What

would happen with the money if the trip got cancelled? What would happen with the money if they catch COVID before and had to go in quarantine?

So, it was a quite pragmatic approach on travel planning. And what came out in the end, what we saw is that many, many people all over Europe adapted, were flexible and did what was possible, rather than saying: ok, I cannot do this, then I will not travel at all.

Jonathan Elliott

So, before we go, I have a question to ask both of you, which mirrors the opening question, which is: what your plans are this year to go on holiday? How confident you are that you'll be enjoying it exactly as you plan? Because obviously during the pandemic, plans were very difficult to make.

So, tell us, what are your holiday plans, Ulf?

Ulf Sonntag

If I knew that answer, I would be maybe a little bit more relaxed. So, the fact is, we know where we are going for the Easter holidays and this is going skiing to Norway. And this is the first time, so, we're trying that out and we are quite curious how this would go.

Jonathan Elliott

Christophe?

Christophe Demunter

We usually don't plan a long time ahead, so summer, it's still a black box for us. But I can already confirm to Ulf that I'm going to Porto of the beginning of June for a music festival, so I'm staying there four days.

And this was booked a long time in advance. Closer to today, we're going to Italy for Easter holidays.

Jonathan Elliott

Thank you very, very much. You've both been amazing, Christophe Demunter and Ulf Sonntag there. Everyone that was Stats in a Wrap. If you've enjoyed it, don't forget to follow us on Twitter and share the show with friends and colleagues. You can find us on Spotify, Apple, Google and all the usual places. And of course, join us next month when we'll be dishing up more flavoursome insights from Eurostat, this time into the complex origins of Europe's mountain of waste.

We'll be asking, are our waste related habits changing? What about the strangely widening gap between the packaging we produce and what we recycle? Eurostat has the numbers and the answers in the next episode of Stats in a Wrap.

Goodbye for now, goodbye!

Further information:

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