

Looking to the future: The fight of the tourism sector against COVID-19



About the study.

With this study, we aim to analyze where the sector is focusing its efforts to fight COVID-19 towards its recovery.

To carry this study, we have conducted interviews to more than 4.700 professionals and 427 companies in the tourism and hospitality sector from seven european countries: Austria, France, Germany, Italy, Portugal, Spain and Switzerland.

The results show how the tourism and hospitality industry is still severely affected by COVID-19. Furthermore, the study also highlights the main measures implemented to support the economical activity in this sector and where are investments bieng made for aiming for its recovery, with technology and talent retention being key factors in such process.

Due to roundings, values might slightly deviate from 100%. Percentages underneath 1% are presented in this study as 0%.

Answers from HR professionals, company owners and managing directors.



What measures did you have to take to reduce costs?



Facing this health crisis, most Spanish businesses had to **Lay off** their employees (**37%**), **reduce costs (26%)** and to **stop recruitment processes (14%)**.

Compared to May, Lay offs have increased by 10% and companies are still not hiring.

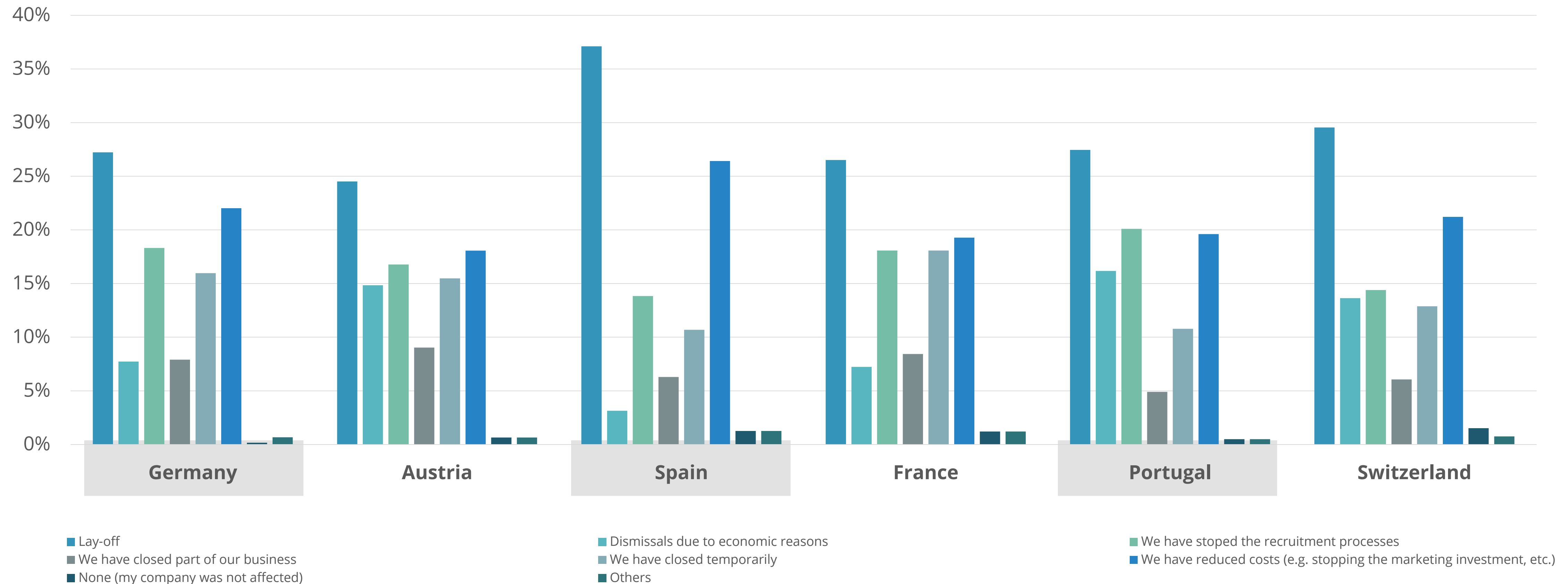


In May, the majority of businesses in Spain were forced to either close temporarily or to lay off workers.

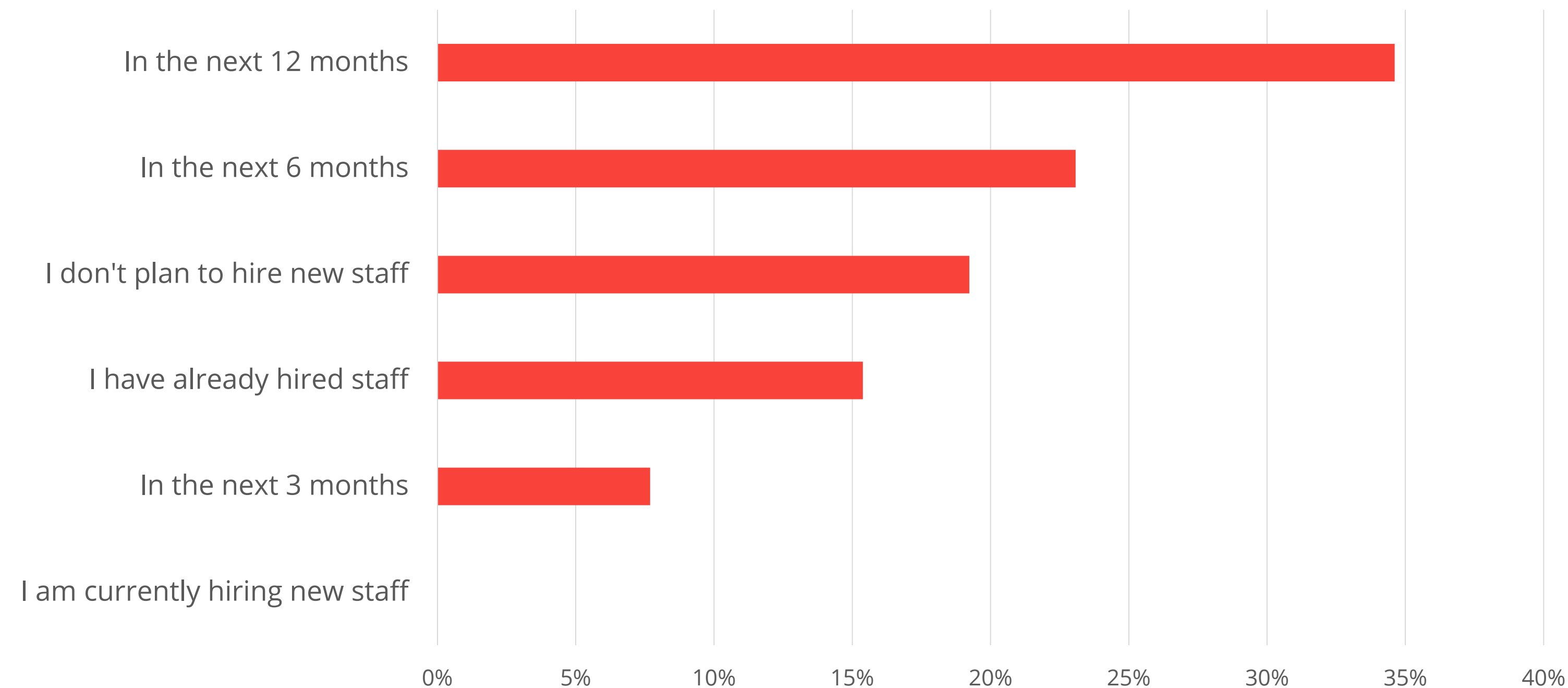
Regarding hiring, the number of **businesses stopping their recruitment processes** has **increased by 6%** in the past five months.

What measures did you have to implement to reduce costs?

In Europe, the **main measure** applied was to **Lay off** employees. If we compare the spanish companies with the remaining countries, we conclude that, even though there have been dismissals due to economic reasons, it didn't reach such high values like in Austria, Switzerland or Portugal, where such measure is on the top 4.



When do you expect to recruit and hire staff again?

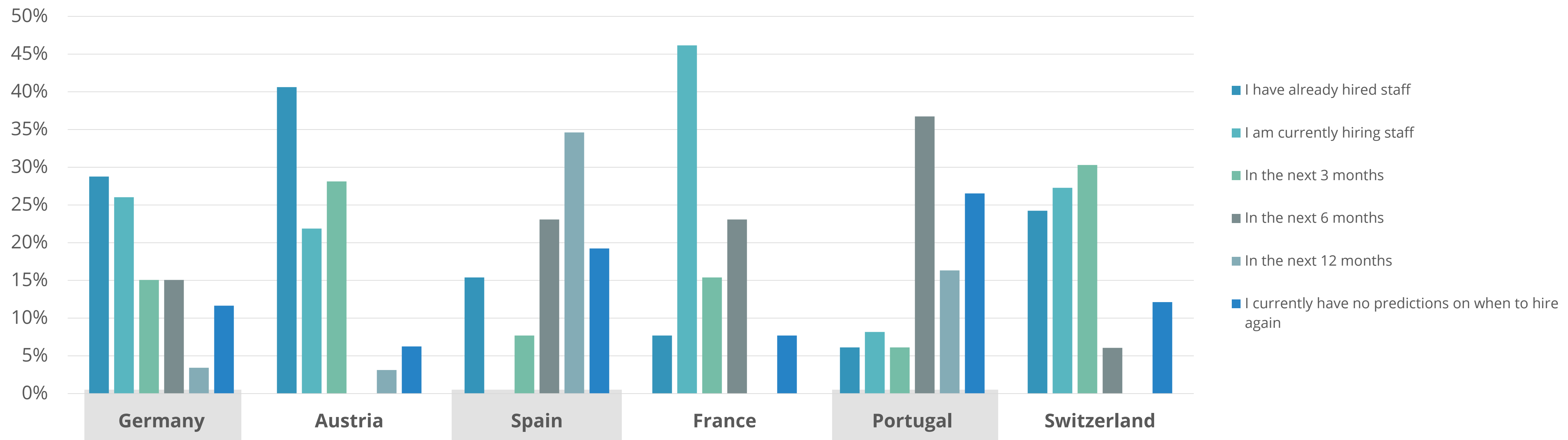


Facing the challenges of the situation and the need for reducing costs, **64%** of the spanish companies state they **don't intend to hire in the near future**. What is the expectation?

1 out of 6 companies don't expect to do so in the next 6 months; and 35% in the next year.

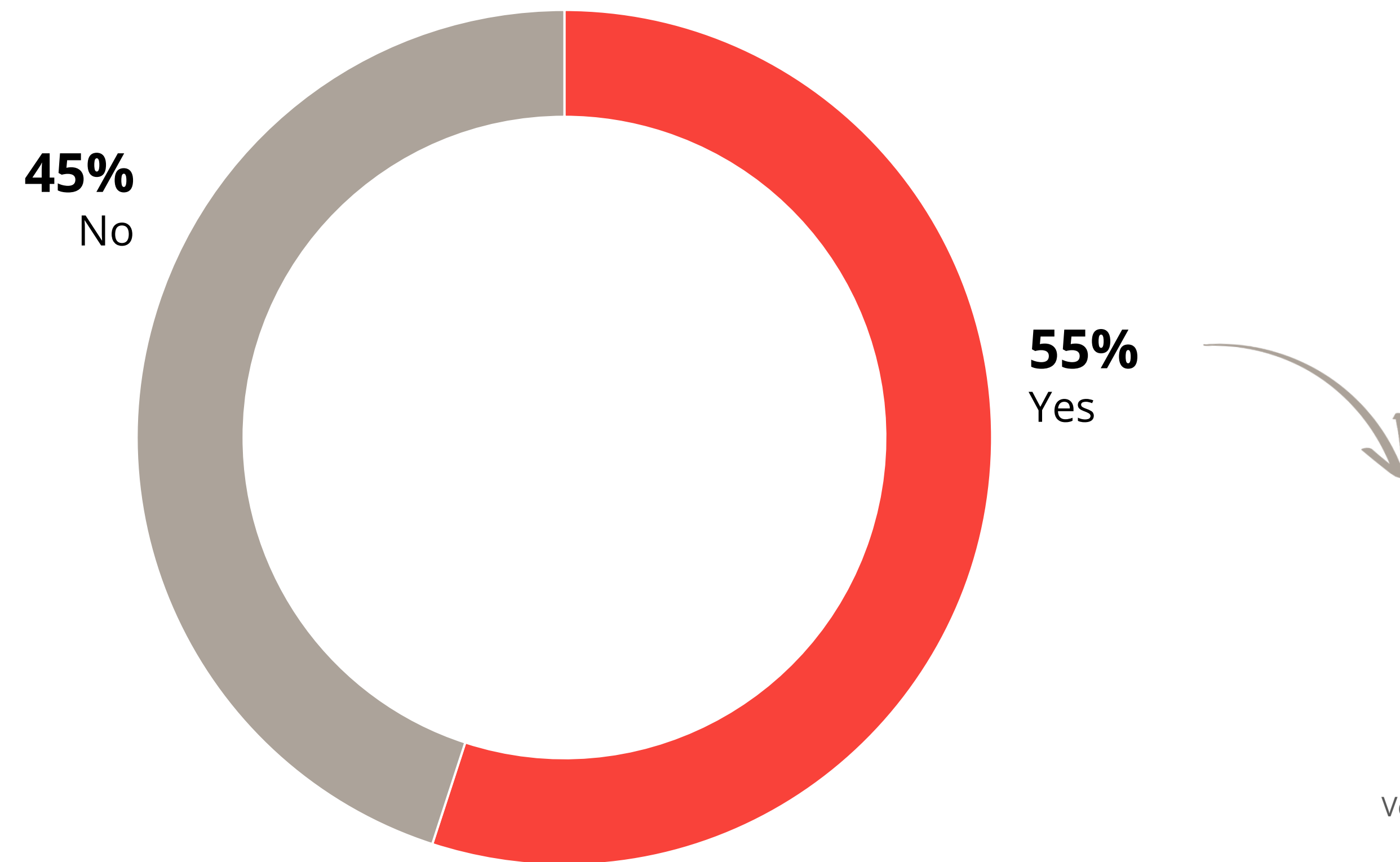
What countries are reactivating the recruitment processes?

There has been a forced reduction on the tourism and hospitality activity and, consequently, companies worldwide have been forced to suspend their recruitment processes. Countries like **Switzerland, Austria and Germany** are more optimistic, as companies here **predict hiring new staff in the next 3 month.**

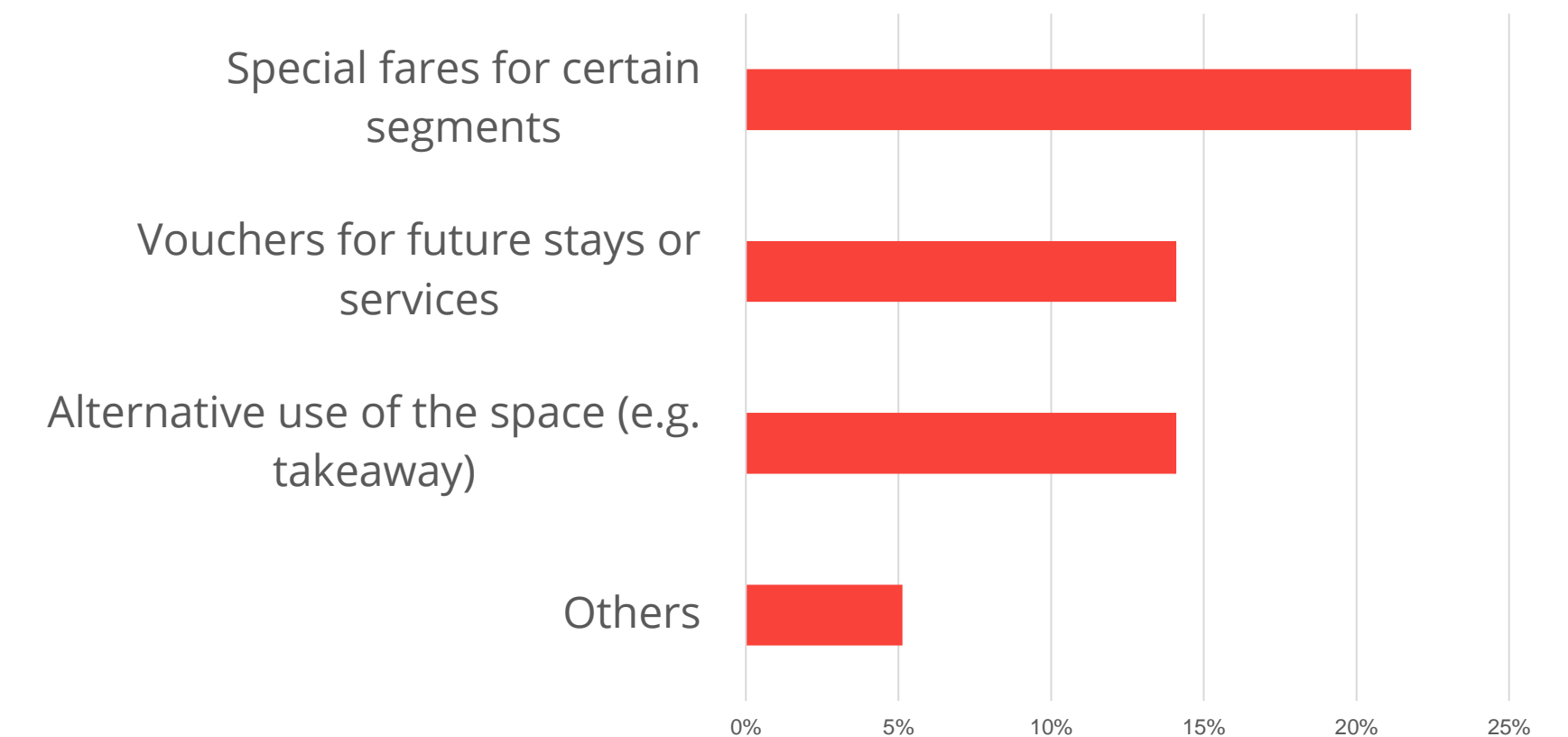


Did you implement new business models to generate revenue?

Data from spanish companies

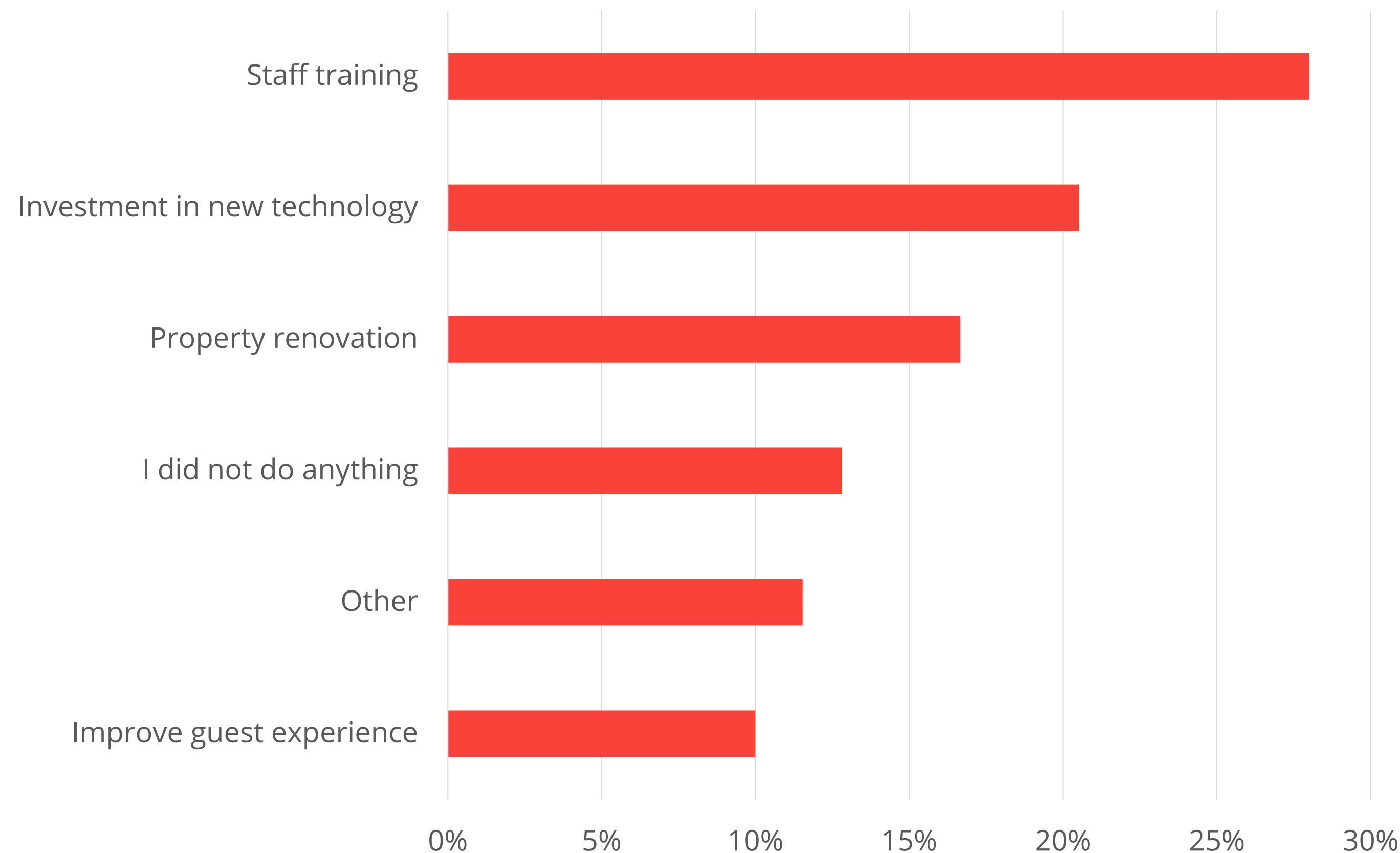


Which new models have you developed?



Is technology redefining the future of our sector?

67% of the spanish businessmen state that the current situation has taught us to work in a different way, where **technology is being key in the redefinition of our jobs and businesses.**

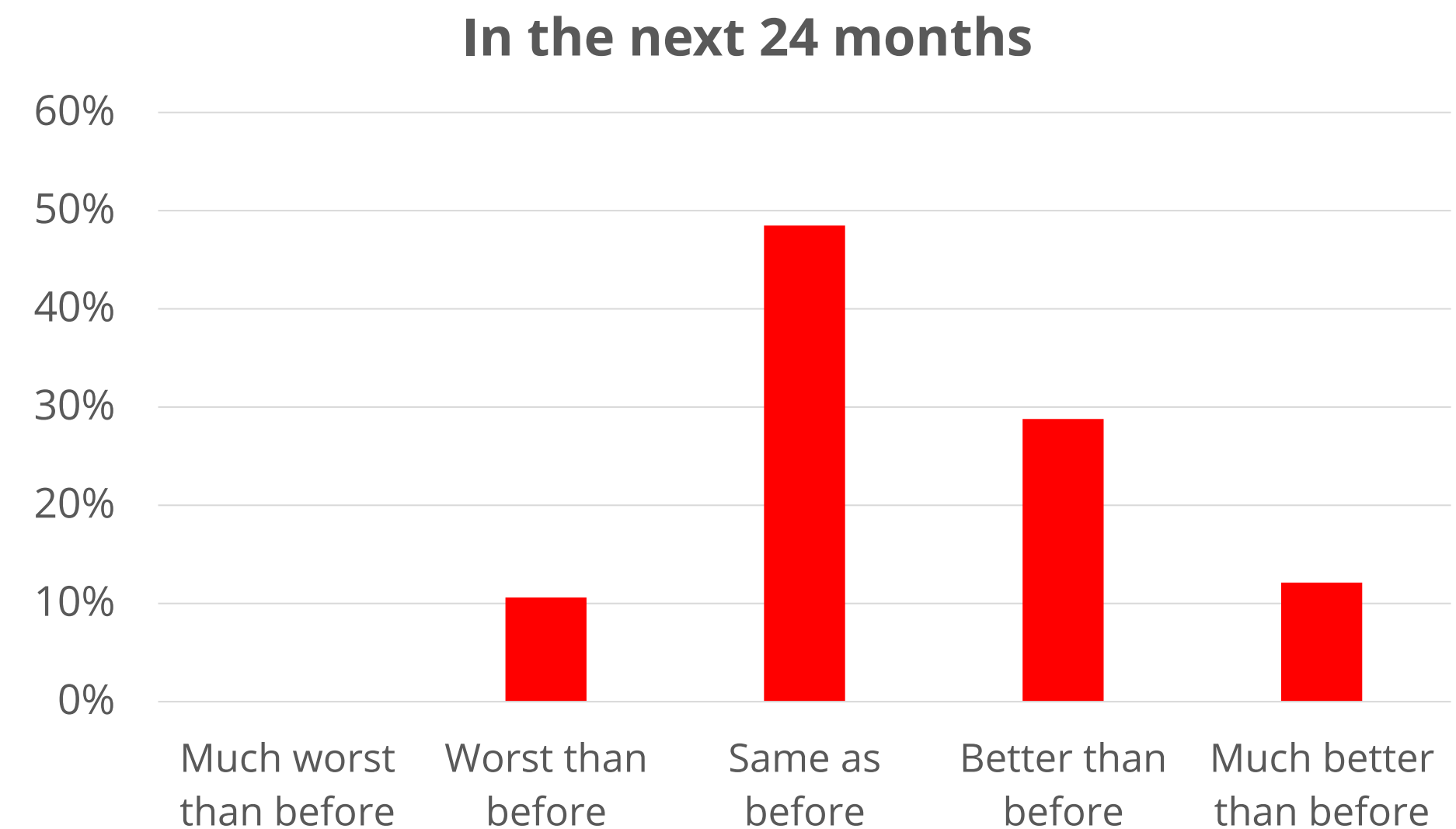
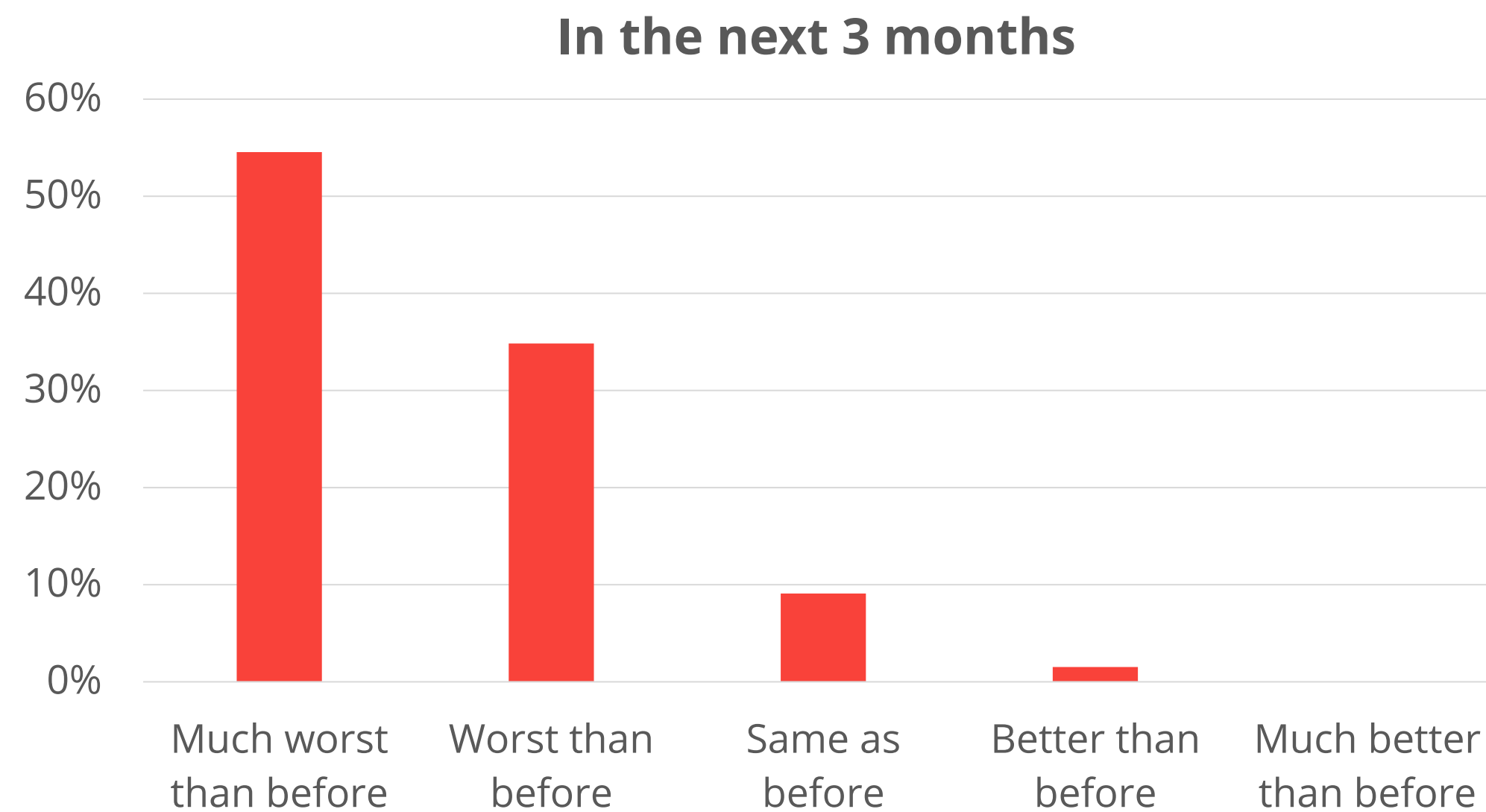


Even though the surveyed believe that technology is key, only 21% has invested in it during this period. Nevertheless, **almost 30% of the companies focused on training their staff.**

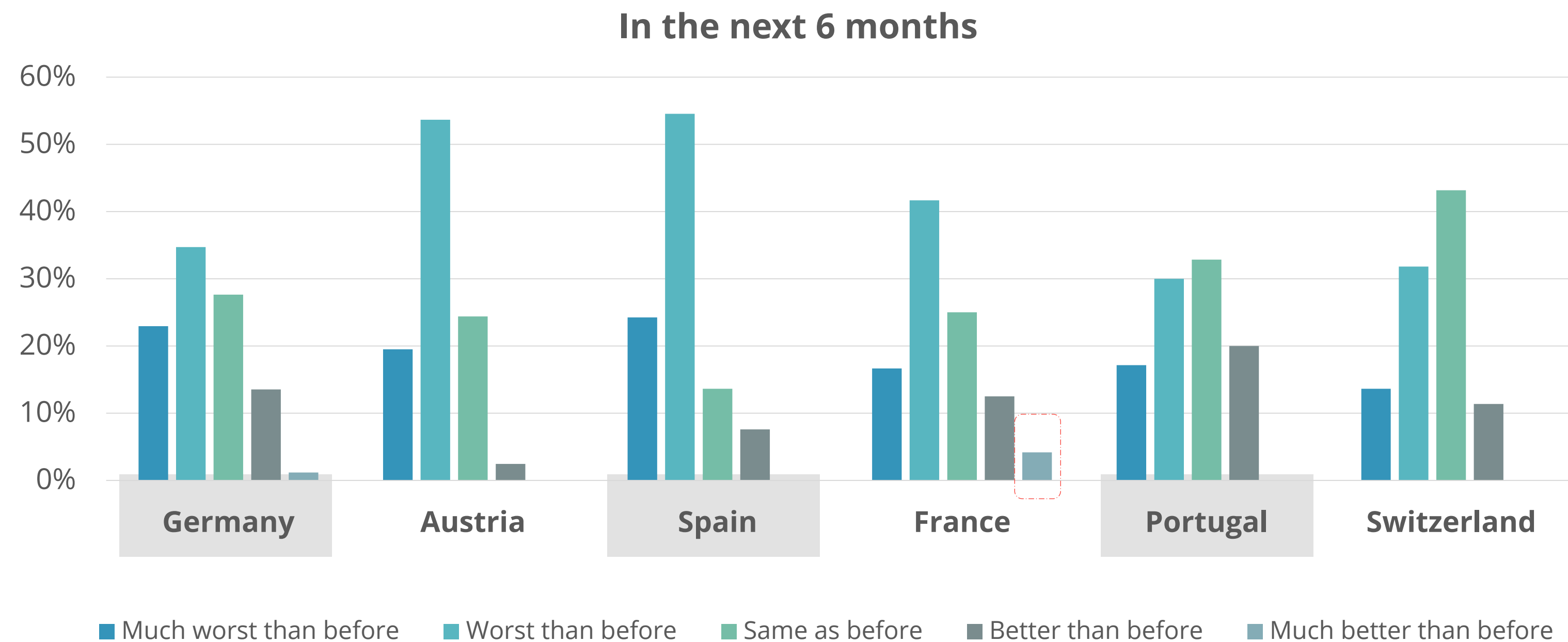
What is the prediction for the recovery of the sector in Spain?

Nationwide, businesses are not optimistic on the short run. **They believe the situation will not improve until the next two years**, with 48% considering that by then we will be in the same situation as before, while nearly 30% believes we will be better than before.

And in the meantime? The truth is that in the short term the situation seems to be complicated. **55%** of the surveyed consider that within the next 3 months the situation is even going to **get worst**.



What is the prediction for the recovery of the sector in Europe?



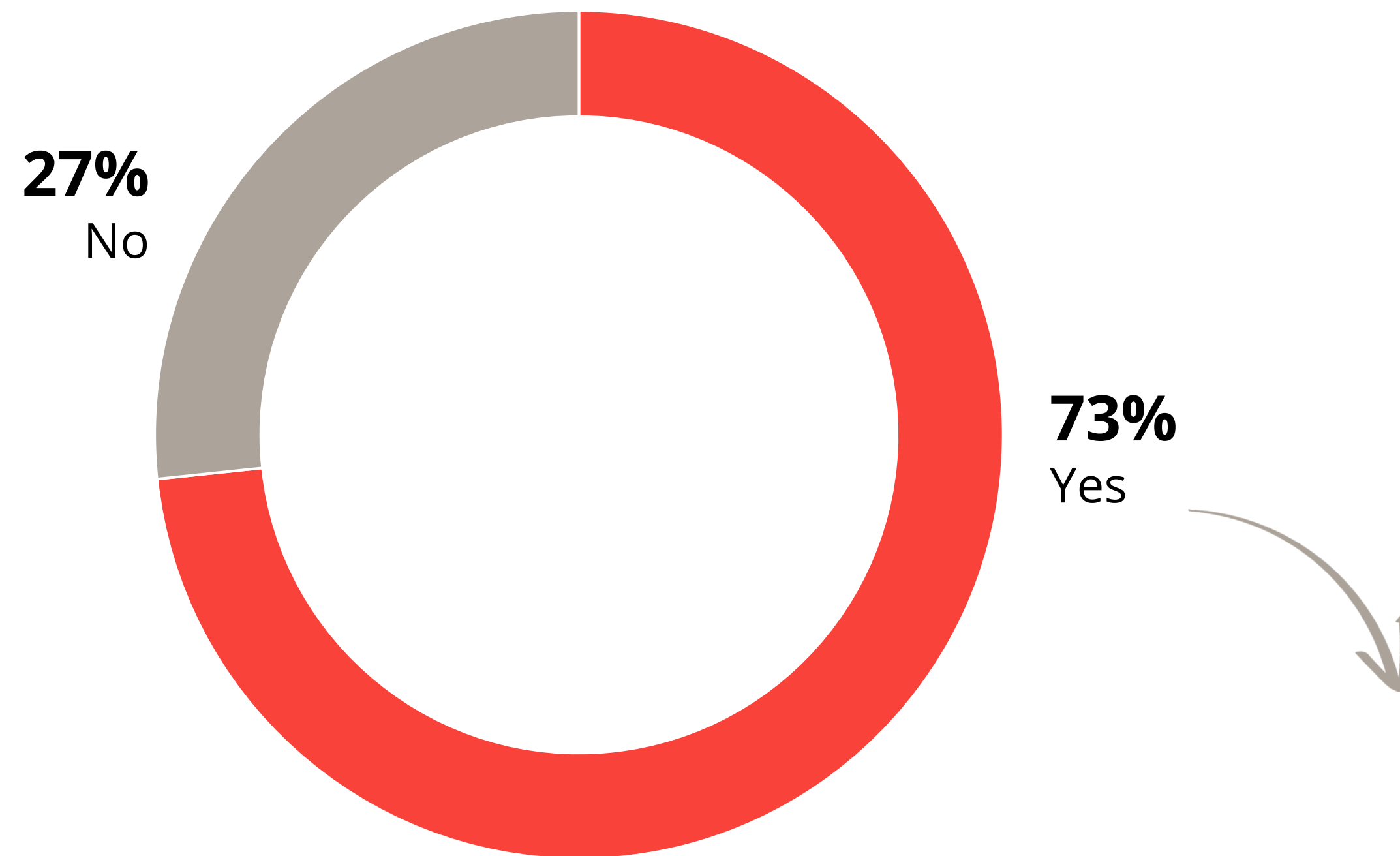
In Europe, the context is a bit **more optimistic**. Countries such as **Switzerland**, with 43%, or **Portugal**, with 33%, **believe that within six months the sector will return to the levels prior to the health crisis**.

One out of eight french companies believe the sector will be better than before.

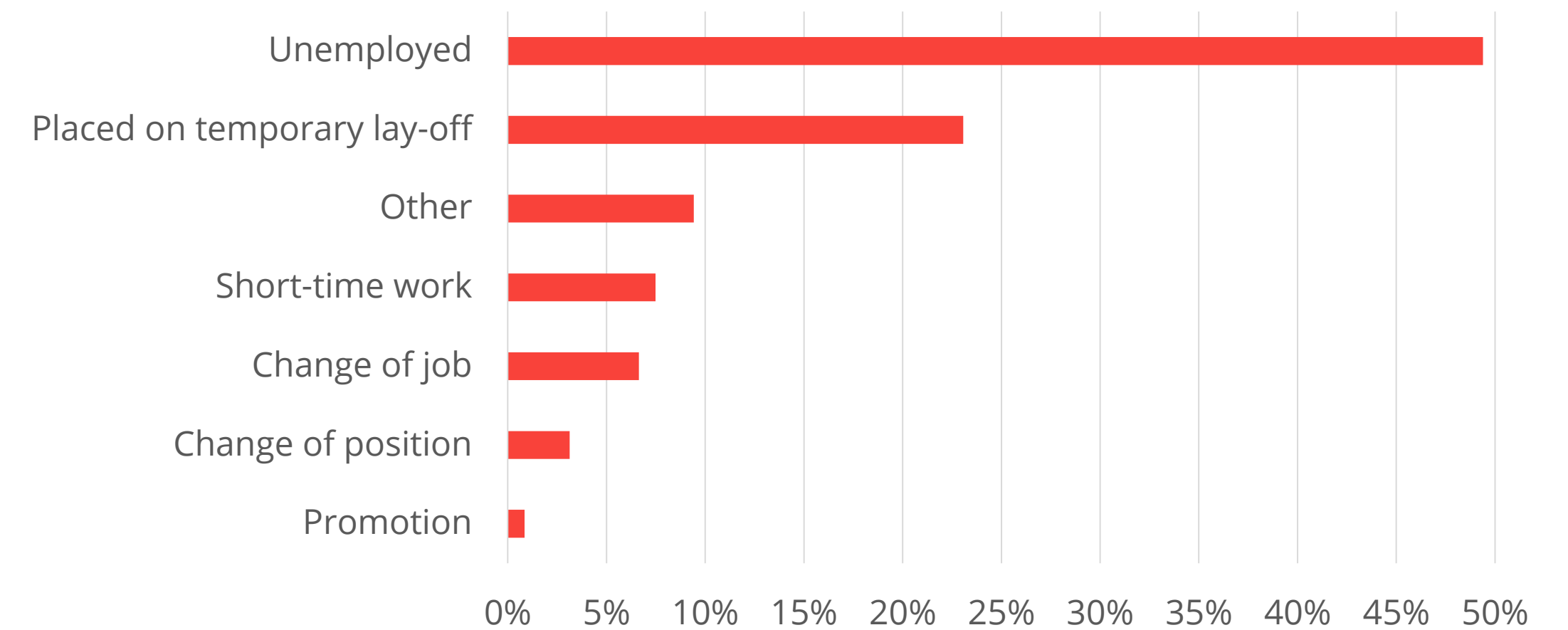
Answers from professionals within the tourism and hospitality sector.



Did your employment situation changed due to COVID-19?

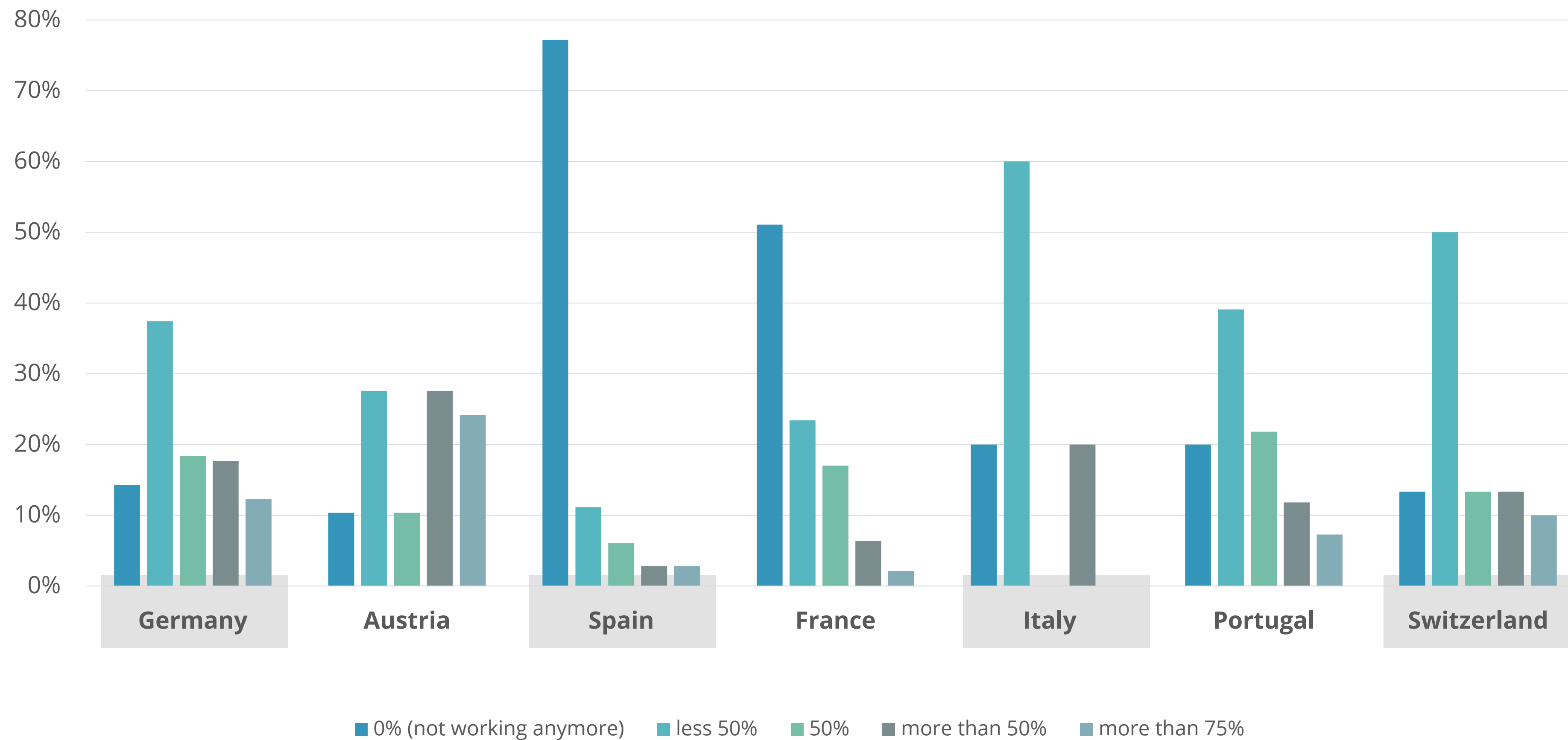


What changes have happened on a professional level?



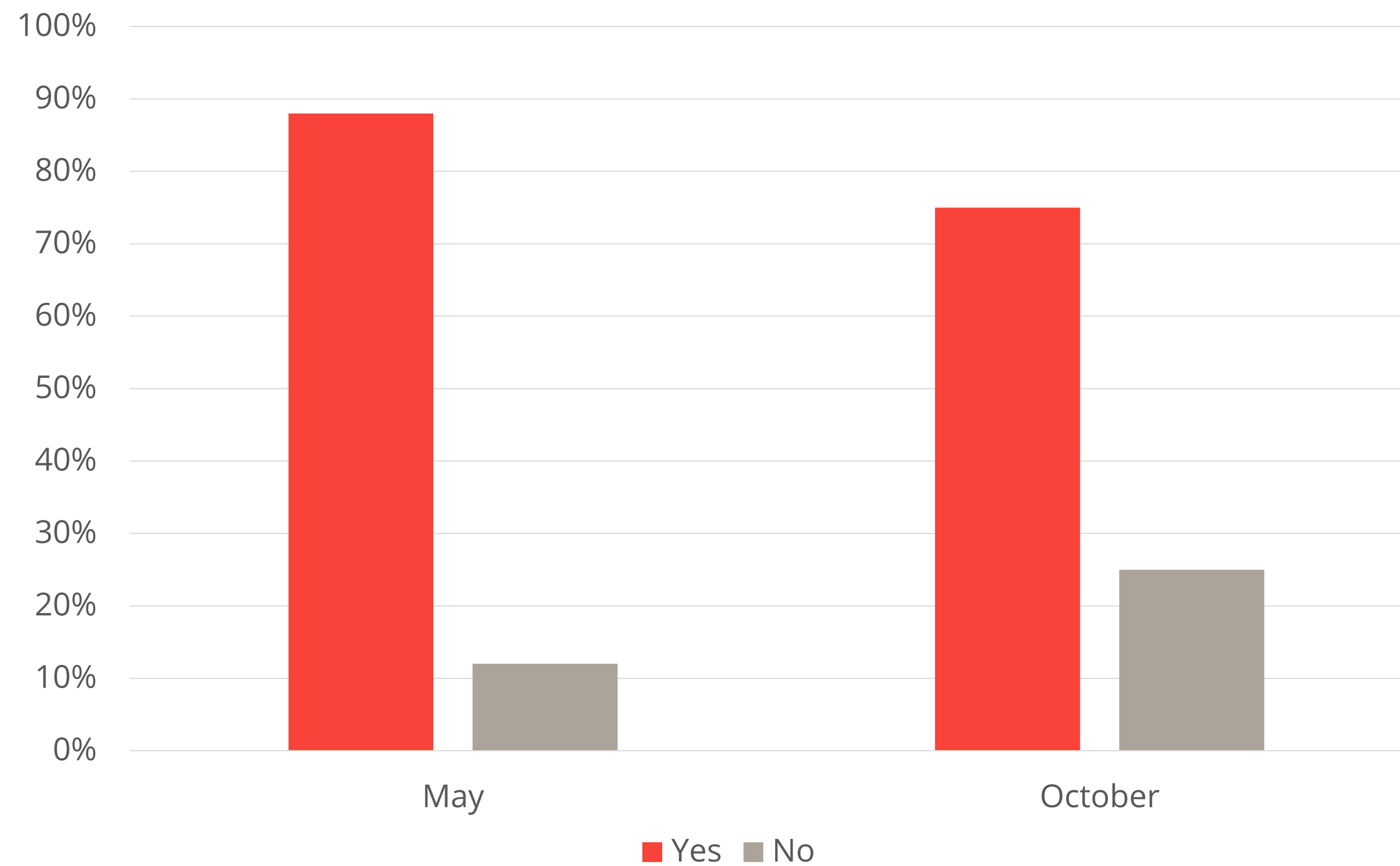
What is the current employment situation in Europe?

Austria, Germany and Portugal are the countries with a higher number of **professionals**, within the tourism and hospitality sector, **who are currently working 50% of more of their stipulated working hours.**

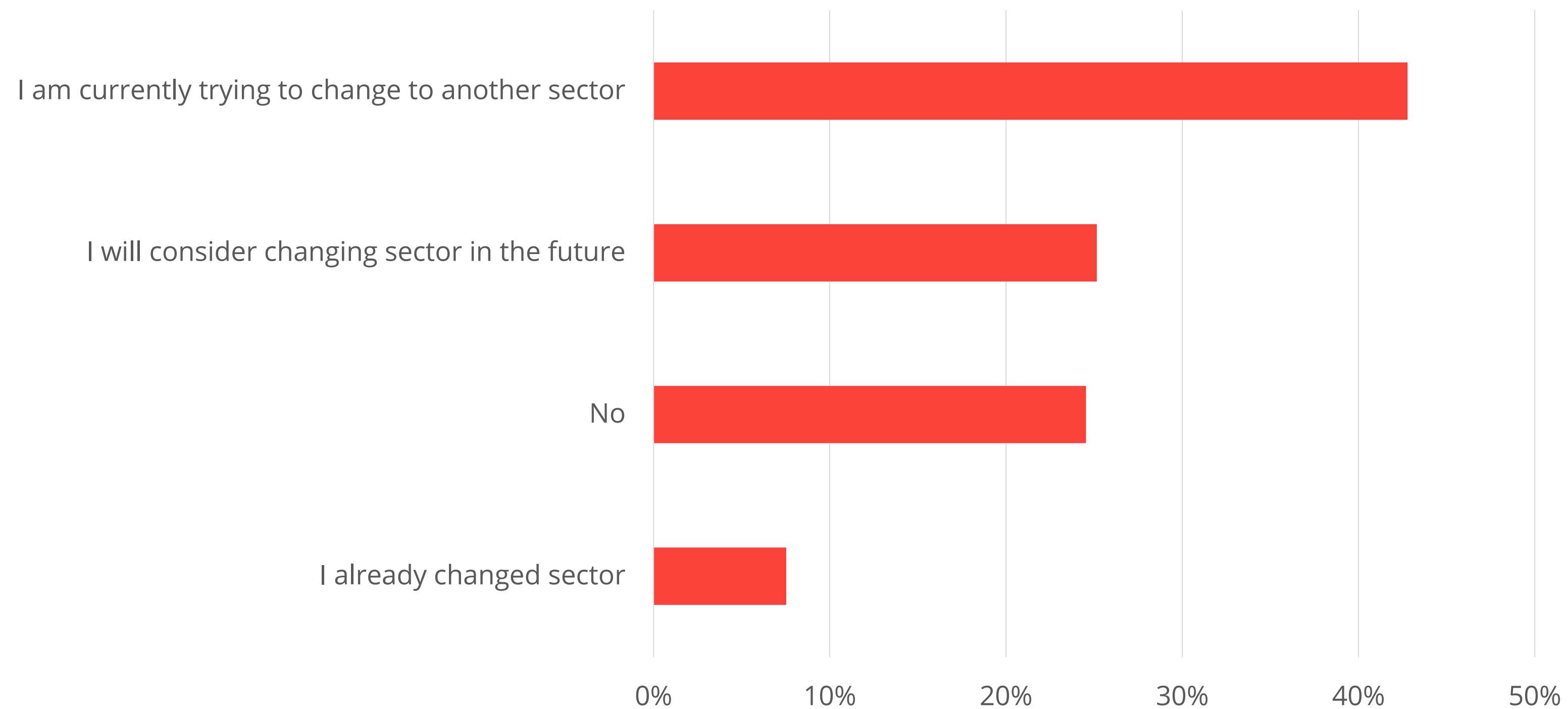


Are you looking for a job?

If we compare the results with the ones from our study in May, we can conclude that the amount of **professionals currently looking for a job, in our country, has decreased by 13%.**



Are you considering changing sector?



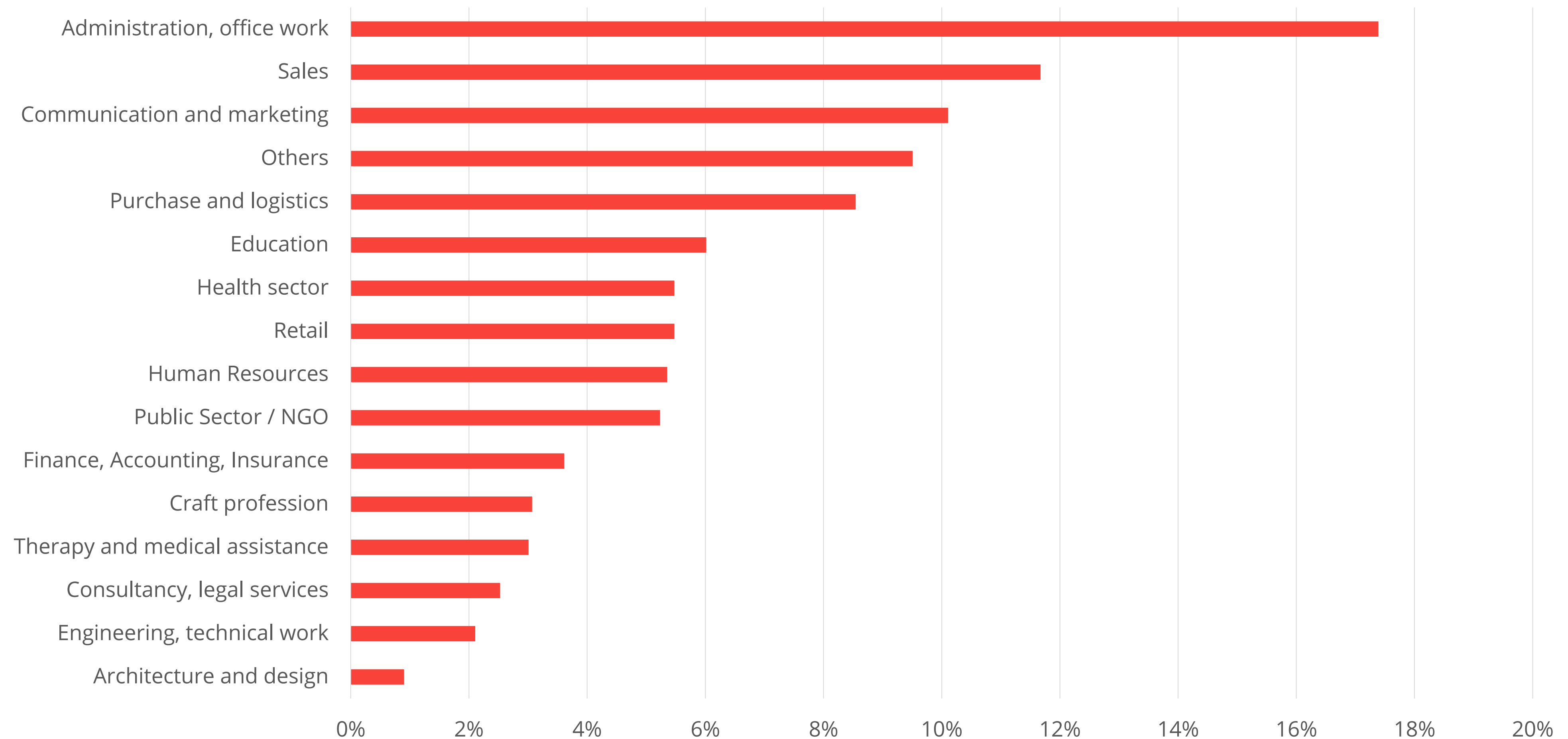
One of the **main consequences** highlighted in the area of hospitality and tourism is **the migration of talent to other sectors**.

More than half of the surveyed state they are **considering to change in the short term**; of which 8% have already found a job in another industry.

To which sector would you like to change / have you changed?

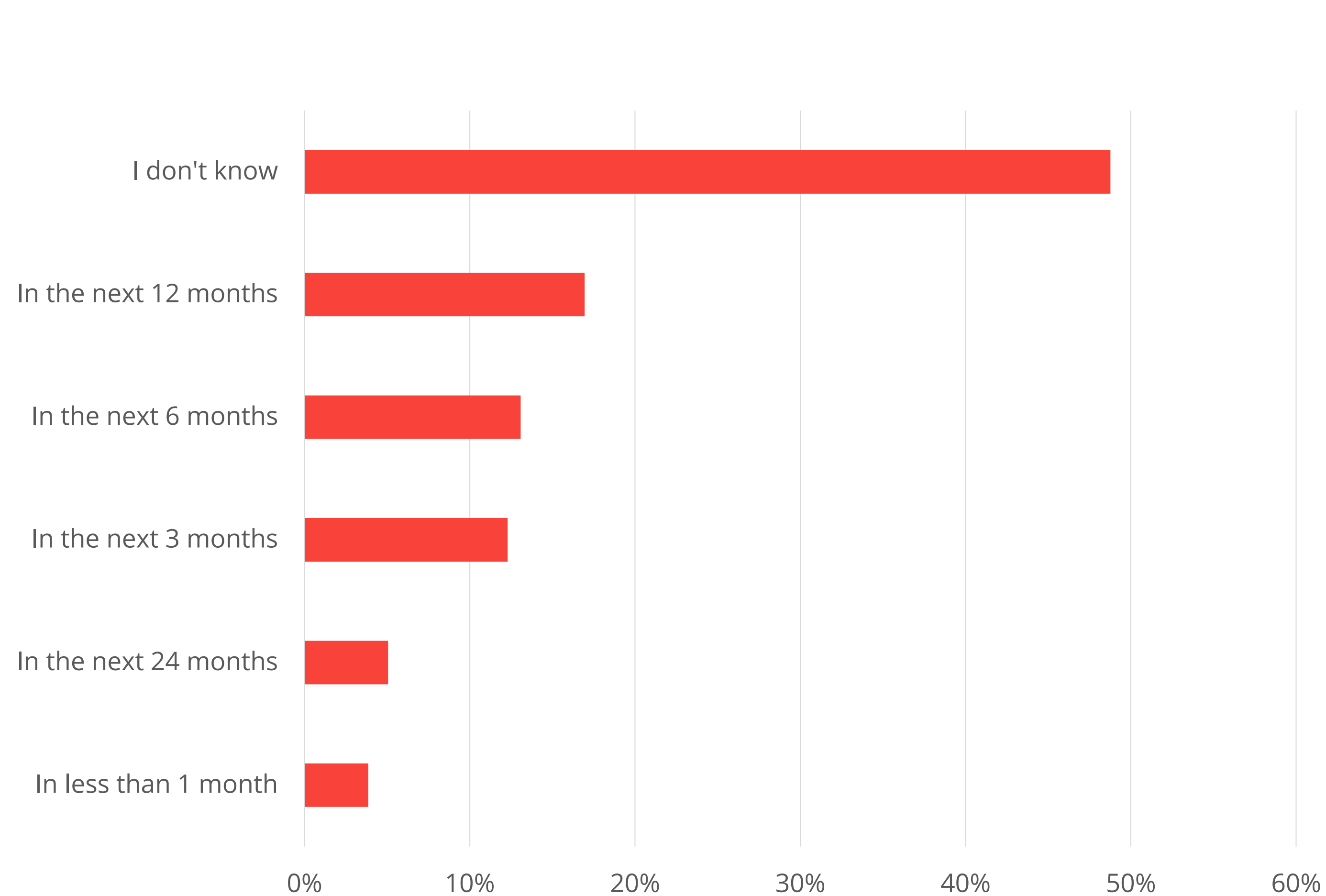
The areas of greatest interest when looking for a change are: **Administration** (17%), **Sales** (12%) and **Communications and Marketing** (10%).

In 'others', the areas more mentioned are Customer Service, Web development / IT and Cleaning.



Data from Spain

What are your expectations to find a job during these times?



The situation we are living is full of uncertainty. **The majority of applicants don't know when they will be able to find a job.**

However, some professionals start to do predictions, even if not very encouraging. **30% of the surveyed believe that, until at least the next 6 months they will not be able to find a job** in tourism and hospitality.

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the difference.**
