



## [European tourism to recovering destinations](#)

Developing countries are especially vulnerable to the effects of geopolitical instability. Tourism can be a key instrument for recovery, as European travellers are often eager to return. To develop or redevelop tourism, affected destinations need to invest in tourism infrastructure, and restore their safety image through honest communication. Ideally, they have risk management strategies in place. The Netherlands, Sweden, France, Italy, Germany and the United Kingdom are promising source markets.

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## 1 . Product description

An unfortunately continuing trend in the travel industry is the effect of geopolitical instability. Countries are increasingly exposed to such things as political turmoil and natural disasters. Especially developing countries are vulnerable to these events. They are exposed more often, while having fewer resources and mechanisms to cope. [Tourism can be an effective tool to build peace](#), through economic development, as well as cultural understanding and environmental conservation.

In this study, “recovering destinations” refers to areas that suffered widespread human, material, economic and/or environmental losses, severely compromising the local tourism market. These can be areas that have experienced an incident or a crisis. An incident is usually an unforeseen singular event – often a natural disaster – whereas a crisis generally refers to a long-term conflict.

Table 1: Differences between an incident and a crisis

Incident	Crisis
<ul style="list-style-type: none"> <li>• short-term</li> <li>• often a singular event</li> <li>• generally unforeseen</li> <li>• short, but heavy impact</li> <li>• shorter recovery phase</li> </ul>	<ul style="list-style-type: none"> <li>• long-term</li> <li>• often multiple events</li> <li>• generally foreseen</li> <li>• long impact</li> <li>• longer recovery phase</li> </ul>
<p>Examples:</p> <ul style="list-style-type: none"> <li>• act of terrorism: for example a bomb explosion</li> <li>• criminal act: such as rape or kidnapping</li> <li>• natural disaster: for instance a cyclone, drought, earthquake, epidemic, extreme temperatures, flood, hurricane, tsunami, volcanic eruption, wildfire</li> </ul>	<p>Examples:</p> <ul style="list-style-type: none"> <li>• civil war</li> <li>• ethnic conflict</li> <li>• political conflict</li> <li>• religious conflict</li> </ul>

The [WorldRiskReport](#) combines the likelihood of natural disasters with countries' ability to cope with such events. This illustrates that developing countries are indeed most at risk. Their exposure to natural hazards is relatively high and the population is vulnerable, while coping capacities and preparation are limited.

The [Conflict Barometer](#) confirms that developing countries are also more frequently exposed to conflicts than developed countries. Highly violent conflicts are most common in Africa, although Asian and Latin American countries also have to deal with violent crises. The [Fragile States Index](#) indicates that although developing countries are generally the most fragile, considerable improvement can also exist, such as in destinations like Nepal and Colombia.

## Traveller profile

European travellers that are interested in recovering destinations are generally experienced, adventurous travellers that like a challenge. These travellers often want to explore the country, and are therefore especially interested in round trips. They are usually driven by curiosity, or they already planned a trip to these destinations in the past. Many are repeat visitors, who are generally less hesitant to visit a recovering destination because of previous good experiences.

## Restore safety image

A safe image is one of the most important requirements for the recovery of a post conflict area. Geopolitical instability does not put Europeans off of travelling. Although they may switch to "safer" destinations initially, tourism to destinations affected by geopolitical instability can also recover quickly. For example, [Turkey received 28% more foreign tourists in 2017 than in 2016](#). Similarly, Egypt and Tunisia rebounded strongly from previous declines.

This illustrates that tourists are eager to come back after the Ministry of Foreign Affairs of a European country amends or retracts its travel warnings. Until then, most commercial tour operators do not offer holidays to countries that their government has declared "unsafe". It is therefore key for recovering destinations to restore their safety image and with that, the confidence in their destination.

### Tips:

- Keep (potential) customers updated on changes in the safety situation in your area, for example via your website and staff. Be open and honest in your communication concerning which areas are safe, or where safety might be an issue. Your client has plenty of information sources too.
- Share safety experiences from customers on your website. Let them write about how safe

they felt, since people value the experience of other travellers.

- Team up with stakeholders at all levels and together develop branding campaigns that counteract negative images, repair your safety image and increase brand identity.
- Participate in European tourism trade events, like [ITB](#) or [World Travel Market](#), and organise press conferences and [familiarisation trips](#) to increase awareness and establish a renewed image.
- If your region is “unsafe”, commercial tour operators will probably not go there. In this case, focus on volunteer organisations and individual travellers. Check your country’s current safety status on the Ministry of Foreign Affairs website of your target countries, such as [Ireland](#) and the [United Kingdom](#).
- Use the negative image in a positive manner. For example, in memory of its ten-year struggle with the Maoist insurgency, Nepal launched a new trekking trail retracing the steps of the Maoist guerrillas. Another example is Montserrat, which developed volcano tourism after its famous eruption, allowing travellers to explore the ruins.

## Invest in infrastructure

Besides damage to their image, recovering destinations also have to cope with physical damage. Even after an incident or crisis has occurred, the physical damage is still present, with valuable infrastructure, properties and tourist sites perhaps having been destroyed. At least some basic level of tourism infrastructure has to be restored/rebuilt to attract or re-attract travellers, such as accommodation, transport and trails.

Travellers do not necessarily mind if certain items are not functioning yet, because of the unique experience and sympathy for a recovering destination. For example, your destination may be home to a famous trekking trail that is now inaccessible due to a ruined bridge. Until the bridge is rebuilt, you can re-route the famous trail along a safe road and/or promote a lesser-known trail as a safe and unique alternative.

### Tips:

- Together with other stakeholders, invest in restoring/rebuilding tourism infrastructure as soon as possible.
- Develop special information campaigns in your main (potential) source markets to inform travellers that tourism facilities in your destination have been restored or rebuilt.

## Focus on risk management

Risk management can reduce the impact of crises and disasters. This starts long before any event occurs. To be prepared for a crisis, tourism companies should develop risk management strategies to mitigate negative consequences and allow for a timely and effective response.

Risk management includes:

- risk identification – assessment of potential hazards and vulnerabilities
- risk prevention – actions intended to reduce the likelihood of adverse events
- risk mitigation – actions intended to reduce the damage should these events occur

- risk coping – actions to take after an event has occurred.

A close working relationship between government organisations, businesses and emergency management agencies is integral to minimise the impact of any conflict or disaster on a tourism destination or business. Tourism associations can also play an important role in aspects like sharing information and providing training.

### Tips:

- Governments and tourism boards should educate tourism businesses in important tourist areas in basic risk management.
- Join forces with governments, tourism boards, tourism businesses and other relevant stakeholders in your destination, and together develop effective risk management strategies to prepare for potential events. These should include such things as weather forecasts, climate variations, plans of zones that are vulnerable to hazards and evacuation plans.
- Also have your own emergency plans in place. Regularly update these plans and make them available on your website to increase trust in your company.
- Use the experiences and lessons learnt from previous conflicts and disasters in your own country or in other, comparable countries.
- Join national and/or international tourism associations to gather information and participate in training courses. For example, you can enrol in the course on [Safety and Risk Management for Adventure Travel Tour Operators](#) provided by the Adventure Travel Trade Association (ATTA).
- For more information, see our [tips for risk management in tourism](#).

## Emphasise new and/or unique experiences

Travelling to recovering areas is especially popular among adventure travellers and cultural travellers who are seeking new, unique experiences and/or are interested in expanding their historical knowledge. The opening of recovering areas provides these travellers with the possibility of exploring new destinations and having new experiences, while adding excitement to their trip. Unaffected unique experiences may also serve to draw travellers or draw them back, such as famous trails or good surfing spots.

### Tips:

- Emphasise in your marketing the new and/or unique experiences that travellers can find in your destination.
- Try to partner with specialised adventure tourism or cultural tourism tour operators in your European target market(s).

## 2 . Which European markets offer opportunities for tourism to

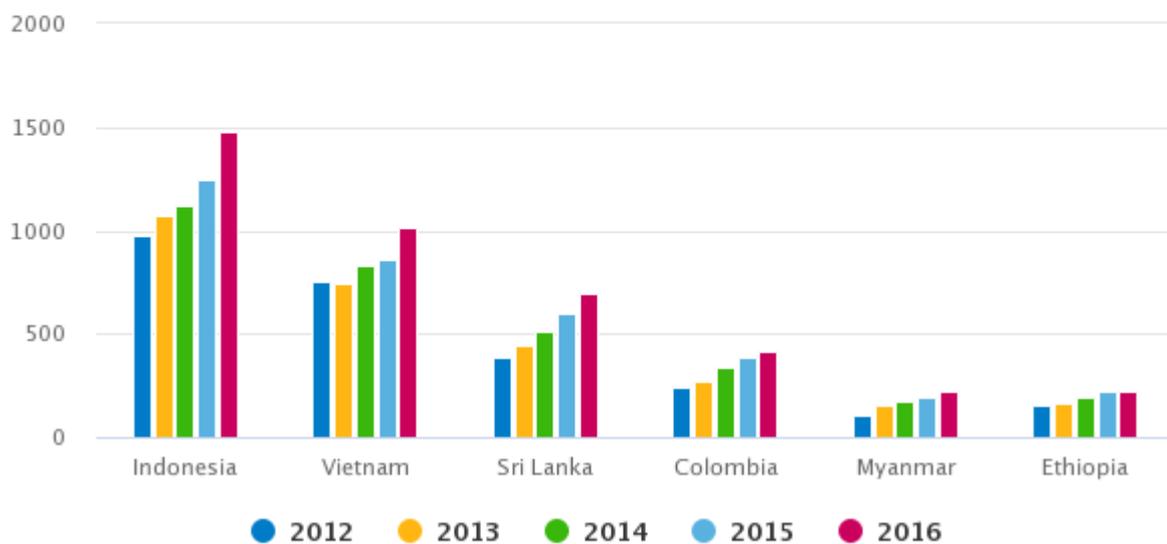
## recovering destinations?

### Increased travel to recovering destinations

Travellers are often eager to return to destinations affected by geopolitical instability. In 2017, [traditionally popular destinations like Turkey, Egypt and Tunisia recovered strongly](#) from recent declines. In addition, [Nepal now welcomes more international travellers than before the 2015 earthquake](#).

Figure 1: Trips to selected recovering destinations from Europe 2012–2016

in thousands of trips



Source: World Tourism Organisation (UNWTO)

Travelling to countries whose borders have newly reopened after extensive periods of crisis is also becoming increasingly popular among European travellers, even if a crisis is already long a thing of the past. For example, Vietnam has become a popular destination after extended periods of conflict, built on both the country's history and everything else it has to offer. Another example is Sri Lanka: after 25 years of civil war ended in 2009, tourism arrivals from Europe increased significantly.

Another interesting example is Myanmar. The country's tourism sector benefited from the political change in 2011, opening the country to foreign visitors. Although the recent Rohingya crisis was expected to have a negative impact, this seems to be mitigated by the fact that the affected region is not a major tourist destination.

#### Tip:

- Use successful post-conflict tourism destinations as a good example. Look, for instance, at how these position themselves in product offering, quality and price. You can learn useful lessons from them that you can apply to your own destination and/or business.

### Key European source markets are mature

Promising source markets for tourism to recovering destinations tend to be countries with experienced, explorative travellers. These are generally the more mature markets in northern and

western Europe. Key European source markets include the Netherlands, Sweden, France, Italy, Germany and the United Kingdom.

Dutch and Swedish travellers are generally adventurous and are not afraid of a degree of danger, while Italian and French travellers also tend to be relatively intrepid. Although German and British travellers are a little more cautious, the sheer volume of these source markets makes them interesting.

### Tips:

- Explore your options in the Netherlands, Sweden, France, Italy, Germany and the United Kingdom. If you have limited budget, focus on the market(s) where you have the best connections or speak the language.
- Do not forget the countries where your destination is traditionally popular, as you may be able to attract repeat customers from there. Email marketing is an especially useful tool for this. For more information on how to maintain a relationship with your previous guests, see our [tips for online success](#).

For more information on European outbound travel in general, see our study about [European demand for tourism in developing countries](#).

## 3 . What trends offer opportunities on the European market for tourism to recovering destinations?

### More specific negative travel advice

In addition to the information you put out, source markets' official travel advice is key to welcoming back travellers. As a result of pressure from the travel industry, Ministries of Foreign Affairs are increasingly becoming more specific when giving negative travel advice. They give travel advice on a regional level, rather than a national level. This way, (relatively) unaffected regions can start the recovery process of their tourism industry as soon as they are ready.

For example, many countries issued a negative travel advice for the entire country of Nepal after the 2015 earthquake. This led to an enormous drop in tourism arrivals. Tourism companies in Nepal teamed up and started a lobby directed at the consulates and embassies to limit the negative travel advice to the areas that were really affected by the earthquake. Their lobby was successful and the negative travel advice was lifted from unaffected areas.

### Tip:

- If your area is (relatively) unaffected after an event and you are ready to receive travellers, try to make sure you are excluded from any potential negative travel advice. Team up with local stakeholders to maximise your influence.

### Volunteering on recovery projects

Philanthropic travel and volunteering are increasingly popular activities. They are intended to support economic prosperity, harmony, and peace building in recovering destinations. Common activities of volunteering organisations and travellers include building and funding health centres,

mobile health services, rural schools, community run guesthouses and solar-power generators. However this so-called [voluntourism also poses risks, for example to local children](#) and wildlife.

### Tips:

- Be careful when offering voluntourism experiences and make sure they actually benefit your local community, environment and/or wildlife. Work with trusted volunteer organisations.
- If you are in Africa, consider [Fair Trade Tourism](#) certification. Since 2016, this certification standard includes additional criteria for tourism products with volunteer offerings.

## “Dark tourism” is on the rise

An increasingly recognised travel trend is “dark tourism”. European travellers are increasingly interested in visiting battlefields, memorials, cemeteries, disaster areas and historic sites that serve as a reminder of today’s ideals and hardships. This kind of tourism is also referred to as disaster tourism, black tourism or war tourism. These activities are usually part of a holiday rather than the main holiday purpose.

### Tip:

- Develop products and tours for dark tourism enthusiasts. For example, map out a trail along several memorial sites.

## Increasing use of online research

European travellers increasingly research and plan their trip online. To gather information and share experiences they use:

- peer review sites, like [TripAdvisor](#) and [Zoover](#)
- travel forums, like Lonely Planet’s [Thorn Tree forum](#)
- social media, like [Instagram](#), [Facebook](#), [Twitter](#) and [YouTube](#).

These channels are especially relevant for recovering destinations, as they provide you with a great way to spread the word about developments as they occur. You and your guests can share up-to-date information about subjects such as accessibility and available tours and activities.

### Tips:

- Maintain a strong internet presence and online marketing strategy, including social media.
- Use photos and videos to bring your story to life. For more information, watch this [webinar series on visual communication in adventure travel](#) by ATTA and Libris.
- Use current customers as ambassadors for your company and area. Encourage them to share their experiences and visuals on social media, write blogs and review your company.
- For more information, see our [10 tips for online success with your tourism company](#).

For more information, see our study about [European tourism market trends](#).

## 4 . What requirements should tourism products in recovering destinations comply with to be allowed on the European market?

For general tourism requirements, see our study on [what requirements your services should comply with to attract European tourists](#).

There are some voluntary safety standards for adventure tourism, which can be relevant for recovering destinations as well.

### Voluntary safety standards

Safety is extremely important for adventure tourism. Three international ISO (International Organization for Standardization) standards support safe practices in adventure tourism: [21101](#), [21102](#) and [21103](#). Additionally, some countries have their own voluntary standards, such as [BS 8848](#) in the United Kingdom.

### Tips:

- Study the ISO standards on adventure tourism. Use them to enhance your safety performance.
- Check for possible voluntary standards in your target markets.

## 5 . What competition do you face on the European tourism market?

Examples of developing country destinations that have become popular (again) after conflicts are:

- Cambodia
- Colombia
- Egypt
- Rwanda
- Sri Lanka
- Vietnam.

Popular developing country destinations (previously) affected by natural disasters include:

- Indonesia
- Nepal
- Philippines
- Thailand.

### Tips:

- Study successfully recovering destinations, preferably similar to yours, to learn from them.
- In your marketing message, emphasise the unique elements of your offer that travellers cannot find elsewhere.

For more information, see our study on [what competition you face on the European outbound tourism market](#).

## 6 . Which channels can you use to market your tourism products in Europe?

### Selecting smaller specialised tour operators

As travelling to recovering destinations includes some uncertainty, many European travellers prefer to book their holiday through a tour operator, especially when it comes to lesser-known developing countries, or the more challenging activities. Tour operators therefore remain the most important trade channel. Smaller European tour operators specialised in adventure/cultural tourism or your destination offer the best opportunities.

You can identify relevant tour operators via trade associations, events and databases, such as:

- [Adventure Travel Show](#) - annual adventure tourism trade event, January, London
- [Adventure Travel Trade Association](#) (ATTA) - global trade organisation for the adventure travel industry that organises the Adventure Travel World Summit ([search for members](#))
- [ECTAA](#) - national associations of travel agents and tour operators per European country
- [ITB](#) - annual tourism trade event, March, Berlin
- [Wanderlust](#) - magazine for adventurous, authentic travel (browse their [tour operator directory](#))
- [World Travel Market](#) - annual tourism trade event, November, London.

Examples of tour operators specialised in tourism to a number of recovering destinations are [Better Places](#) (the Netherlands), [Äventyrsresor](#) (Sweden) and [Exodus](#) (United Kingdom).

### Generating direct sales

Although your potential guests probably prefer to book through more traditional channels, it is important to be visible online. It increases awareness of your product/service, your professional image and your trustworthiness. To increase awareness and your chances of direct sales, you can promote your product on (adventure or cultural) tourism websites/portals. There are good options in this [list of adventure tourism websites/portals by activity](#).

For an overview of the trade structure for tourism, see our study on [the channels and segments of the European tourism market](#).

## 7 . What are the end-market prices for tourism products?

Travellers have many destinations and types of holiday to choose from. This makes tourism a relatively price-sensitive and competitive industry. The price of a long-haul trip consists of three dimensions:

1. The exchange rate between the currencies of the country of origin and the destination country.
2. The costs of transport to and from the destination country.
3. The price of goods and services the traveller consumes in the destination country.

European tour operators are not open about the purchasing prices of their tourism products. According to industry experts, their margins range between 10–25%. Prices of holiday packages vary widely as they depend on a lot of factors, such as:

- availability
- destination
- modes of transport
- period of travel
- number of travellers
- length of stay
- type of accommodation
- included activities.

## Tips:

- Check which countries have cheap (direct) flights to your destination, for instance at [Skyscanner](#). This gives you a competitive advantage in those countries.
- You can compare prices for travel products via portals like [Lonely Planet Adventure Tours](#).
- Tourism Council WA has some useful [online tools for pricing tours and accommodation](#). These help you determine the break-even point and ideal retail price of your tourism product.

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