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**TOURISM INDUSTRY DEVELOPMENT IN THE CONTEXT OF THE CORONAVIRUS (COVID-19)
PANDEMIC: RESPONSE AND RECOVERY MEASURES**

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Abstract

The article analyzes the impact of the COVID-19 pandemic on the tourism industry. Based on an expert survey, the necessary response measures have been defined to restore the functioning of the tourism industry, including support for tourists and tourism workers, support for tourism companies and destinations, coordination measures, as well as measures to restore confidence and demand stimulation. It has been proven that in order to overcome the negative consequences of the coronavirus pandemic in the tourism sector, it is necessary to take appropriate measures to mitigate the consequences of the pandemic, with their subsequent transformation into longer-term measures to restore and stimulate the functioning of the tourism industry.

Keywords

Tourism – Tourism industry – Domestic tourism – Support measures

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Introduction

The coronavirus (COVID-19) pandemic is, first of all, a humanitarian crisis affecting people's lives and provoking a global economic crisis. This has very tangible implications for the tourism sector, which is critical for many people, destinations and enterprises, with the impact especially felt in countries, cities and regions where tourism is an important part of the economy.

Tourism generates foreign exchange, stimulates regional development, directly supports many types of jobs and enterprises and many local communities¹. Thus, in OECD countries, the sector directly accounts for an average of 4.4% of GDP and 21.5% of exports of services². For example, tourism in Spain accounts for 11.8% of GDP, while travel accounts for 52.3% of total exports of services; in Mexico, these figures are 8.7% and 78.3%, in Iceland – 8.6% and 47.7%, in Portugal – 8.0% and 51.1%, respectively³. Tourism is also a labor-intensive sector, which on average, for example, in OECD countries, directly accounts for 6.9% of employment. This sector is a leading source of employment and job creation, providing jobs for low-skilled workers with more skilled jobs. The sector employs many seasonal, temporary and part-time workers⁴. Under normal circumstances, the tourism sector can help to provide a variety of employment opportunities for migrants, women, students and the elderly, not only in large cities, but also in remote, rural and coastal areas, as well as in other often economically unstable places where alternative employment opportunities can be limited⁵. For example, tourism employment accounts for 15.7% of total employment in Iceland, 13.5% in Spain, 10.3% in Ireland, 10.0% in Greece and 9.8% in Portugal⁶.

¹ L. Shayakhmetova; A. Maidyrova y M. Moldazhanov, "State Regulation of the Tourism Industry for Attracting International Investment", *Journal of Environmental Management and Tourism* Vol: 11 num 6 (2020): 1489 – 1495; Y. A. Kireeva, "The Current State of Event Tourism in Russia", *Turismo: Estudios & Prácticas (UERN)* num 4 (2020): 1-11; G. I. Avtsinova; O. A. Blokhina; N. V. Gubanova; E. E. Konovalova y J. A. Semenova, "Socio-Economic Effects of Small Business Development in The Hospitality Industry in the Context of The Digital Economy", *Turismo: Estudios & Prácticas (UERN)* num 4 (2020): 1-7 y A. A. Fedullin y O. I. Vapnyarskaya, "Development Of Intercultural Communication In Tourism", *Turismo: Estudios & Prácticas (UERN)* num 4 (2020): 1-12.

² Policy Brief: COVID-19 and Transforming Tourism. UNCTAD. August 2020 Retrieved from: https://www.un.org/sites/un2.un.org/files/sg_policy_brief_covid-19_tourism_august_2020.pdf

³ Tourism Policy Responses to the coronavirus (COVID-19). OECD. June 2020. Retrieved from: <https://www.oecd.org/coronavirus/policy-responses/tourism-policy-responses-to-the-coronavirus-covid-19-6466aa20/>

⁴ M. A. Kozhevnikova; S. N. Kurbakova; Y. V. Artemyeva; N. V. Palanchu y M. M. Umarov, "Development of International Tourism in the Context of Integration Processes", *Journal of Environmental Management and Tourism* Vol: 11 num 4 (2020): 1013-1018 y O. I. Vapnyarskaya y T. M. Krivosheeva, "Improving the Quality of Tourist Services in Central Russia", *Utopía Y Praxis Latinoamericana* Vol: 25 num EXTRA 5 (2020): 317-327.

⁵ A. G. Germanovich; O. N. Vasilieva; M. E. Ordynskaya; L. M. Allanina y A. E. Gorokhova, "Impact of Tourism on Sustainable Development of Rural Areas: International Experience", *Journal of Environmental Management and Tourism* Vol: 11 num 4 (2020): 965-972; N. G. Novikova; N. T. Pirozhenko; E. V. Bokareva y N. V. Dmitrieva, "Analysis of the specifics and efficiency improving factors of project management in Russia", *Revista Inclusiones* Vol: 7 num Especial (2020): 115-128 y I. V. Bushueva y E. V. Yudina, "Current state and analysis of tourism development in Russia until 2035", *Revista Inclusiones* Vol: 7 num Especial (2020): 350-356.

⁶ COVID-19: The Great Lockdown and its Impact on Small Business. The International Trade Centre. Retrieved from: <https://www.intracen.org/uploadedFiles/intracenorg/Content/Publications/ITCSMECO2020.pdf>

Tourism is one of the sectors, which has been hit the hardest by the current crisis. International aviation has largely come to a standstill since March 2020, tourist sites and attractions have been closed, major festivals and events have been canceled or postponed and there have been restrictions on public gatherings (indoor and outdoor) in many countries. In addition, despite the sector's proven resilience to previous crises, the sheer depth and breadth of COVID-19's impact on tourism and the economy as a whole mean that a quick recovery, according to numerous experts⁷, is unlikely.

According to OECD estimates, international tourism will decline by 60% in 2020, and if the recovery is delayed until December – by up to 80%. The last time the global tourism economy fell was right after the 2008 financial crisis, when international arrivals fell by 3.9%. According to UNWTO estimates, in the first three months of the year, the number of international tourists will decrease by 22%, while in 2020, it is projected to decline from 58% to 78%, which means a loss of \$910 billion to \$1.2 trillion in export earnings from tourism⁸. Meanwhile, experts predict that 100.8 million jobs worldwide are at risk⁹. Tourism has been identified by researchers as one of the most vulnerable sectors likely to experience dramatic job cuts as a result of the COVID-19 crisis¹⁰.

Literature review

Tourism industry research in recent months has been paying close attention to the impact of the COVID-19 pandemic on the tourism industry, including labor market trends in the tourism industry (Table 1).

No	Manifestations of environmental behavior
1	Global tourism will be hit hard during 2020 and beyond, even if the spread of the virus is brought under control. Tourism companies were among the first to be closed following the measures to contain the spread of the virus, as tourism involves people-to-people interaction and the movement of people traveling from their usual place of residence to destinations within their own country and other countries. Tourism activities are also likely to be the last to resume and it will occur on a phased basis. Even when tourism companies do open, in the absence of the vaccine, they will operate according to the new procedures.

⁷ T. Baum y N. T. T. Hai, "Hospitality, tourism, human rights and the impact of COVID-19", *International Journal of Contemporary Hospitality Management* Vol: 32 num 7 (2020): 2397-2407; Y. Zheng; E. Goh y J. Wen, "The effects of misleading media reports about COVID-19 on Chinese tourists' mental health: A perspective article", *Anatolia* Vol: 31 num 2 (2020): 337-340; N. A. Bakar y S. Rosbi, "Effect of Coronavirus disease (COVID-19) to tourism industry", *International Journal of Advanced Engineering Research and Science* Vol: 7 num 4 (2020): 189-193; Y. Hong; G. Cai; Z. Mo; W. Gao; L. Xu; Y. Jiang y J. Jiang, "The Impact of COVID-19 on Tourist Satisfaction with B&B in Zhejiang, China: An Importance-Performance Analysis", *International Journal of Environmental Research and Public Health* Vol: 17 num 10 (2020) y N. Khazami; Z. Lakner y A. Nefzi, "Pandemic and tourism: Re-preparation of tourism post COVID-19", *The Journal of Business and Hotel Management* Vol: 9 num 2 (2020): 89-95.

⁸ N. Khazami; Z. Lakner y A. Nefzi, "Pandemic and tourism: Re-preparation of tourism post COVID-19"...

⁹ M. Sigala, "Tourism and COVID-19: Impacts and implications for advancing and resetting industry and research" *Journal of Business Research* Vol: 117 (2020): 312-321.

¹⁰ C. M. Hall; D. Scott y S. Gössling, "Pandemics, transformations and tourism: Be careful what you wish for", *Tourism Geographies* Vol: 22 num 3 (2020): 577-598.

	The pandemic could also affect tourist behavior, influencing the resumption and recovery of domestic and international tourism ¹¹
2	Opening the sector will be more difficult than closing it, which will require a balanced approach. While the pandemic and the measures taken to contain the virus have greatly affected tourism, tourist flows are also a potential vector for the spread of the virus. While the continued uncertainty creates additional problems for the sector, moving too quickly could further undermine confidence that the sector will start working in the long term ¹²
4	Domestic tourism will recover faster. It offers a major chance to spur recovery, especially in countries, regions and cities where the sector supports many jobs and enterprises ¹³
5	Domestic tourism will play an important role in the early recovery phase given the uncertain prospects for international travel. Thus, countries in which domestic tourism already constitutes a significant share of the tourism economy are likely to see a recovery in this sector faster than countries that are heavily dependent on international tourist flows. Many countries and the tourism sector seek to promote domestic travel and serve visitors from their home country ¹⁴
6	The possible impact will depend not only on the duration of the pandemic, but also on the potential long-term changes in travel behavior, as a result, of the crisis. The crisis will have a permanent impact on consumer behavior, with greater emphasis on hygiene and healthy lifestyles and increased use of non-cash and contactless payment methods ¹⁵

Table 1
Impact of the COVID-19 pandemic on the tourism industry

The purpose of the article is to analyze the necessary response measures and the prospects for the recovery of the tourism industry in the context of the coronavirus pandemic.

The research objectives:

- to identify response measures to resume the functioning of the tourism industry;
- to consider the implementation of measures to mitigate the effects of the pandemic and longer-term measures to restore and stimulate the tourism industry.

The research hypothesis: In order to overcome the negative consequences of the coronavirus pandemic in the tourism sector, it is necessary to take appropriate measures to mitigate the consequences of the pandemic, followed by their transformation into longer-term measures to restore and stimulate the functioning of the tourism industry.

According to the results of the study, it can be concluded that the goal set in the study has been achieved.

Methods

To solve the tasks set in the work, general scientific methods were used:

¹¹ A. Hoque; F. A. Shikha; M. W. Hasanat; I. Arif y A. B. A. Hamid, "The effect of coronavirus (COVID-19) in the tourism industry in China", *Asian Journal of Multidisciplinary Studies* Vol: 3 num 1 (2020): 52-58.

¹² A. Assaf y R. Scuderi, "COVID-19 and the recovery of the tourism industry", *Tourism Economics* Vol: 26 num 5 (2020): 731-733.

¹³ D. Ioannides y S. Gyimóthy, "COVID-19 crisis as an opportunity for escaping the unsustainable global tourism path", *Tourism Geographies* Vol: 22 num 3 (2020): 624-632.

¹⁴ A. Chebli y F. Ben Said, "The impact of COVID-19 on tourist consumption behavior: a perspective article", *Journal of Tourism Management Research* Vol: 2 (2020): 196-207.

¹⁵ S. Gössling; D. Scott y C. M. Hall, "Pandemics, tourism and global change: A rapid assessment of COVID-19", *Journal of Sustainable Tourism* (2020): 1-20.

a) theoretical: analysis of peer-reviewed scientific sources and industry analytics on the development of the tourism industry in the context of the COVID-19 pandemic;

b) empirical: an expert survey. The main tasks for the experts were to define the response measures to restore the functioning of the tourism industry and justify the use of the measures to mitigate the consequences of the pandemic and longer-term measures to restore and stimulate the functioning of the tourism industry.

At the first stage of the research, the available scientific works and analytical sources in the field of the research were studied.

At the second stage of the research, online communication with the experts was carried out. The survey was conducted in Russian on September 21, 2020. The experts (24 people), employees of travel companies, whose professional activities had been associated with the tourism business for more than 5 years, took part in the survey. All the survey participants were warned about the purpose of the survey and that the organizers of the study planned to publish the results in a generalized form.

Results

The crisis demonstrates the urgent need for tourism policies to take an integrated approach so that responses – to mitigate the impact of the pandemic, as well as long-term recovery and stimulus measures – are coherent and complementary to overall economic stimulus packages (e.g. support measures for SMEs and tourism workers) (Table 2).

№	Response measures	Expert opinion
1	Help for tourists	Tourists outside of their normal environment often suffer from a lack of information and steps need to be taken to provide assistance and information in different languages and formats
2	Employees and business support	The tourism sector will benefit from cross-sectoral measures introduced to provide flexibility and ease the work of industry workers. Measures are needed to specifically target the self-employed, which is especially true for many micro and small tourism companies. In countries and regions where the impact of the pandemic on tourism is particularly significant, the focus should be on providing financial assistance to tourism SMEs, such as deferred payment of VAT. Non-financial support is also needed, including the provision of information and advice on compliance with the new rules
3	Support for tourist destinations	The impact of the pandemic on travel destinations will vary according to several factors, with those most dependent on international markets being hit the hardest. Other key factors include the nature of the tourism supply, the impact of restrictions on tourist flows, the size of the domestic tourism market and the place of tourism in the overall economy. That is, individual measures are needed
4	Using measures of coordination and target groups	Some countries have established coordination mechanisms such as government committees and task forces to monitor the impact of the pandemic on tourism and respond to a rapidly changing situation. These mechanisms often aim at identifying those subsectors that are most distressed and in need of immediate assistance and at developing road maps and action plans. A dialogue with the industry should be a priority to ensure targeted and effective responses

5	Providing tourist confidence and demand stimulation	Tourists will need to be convinced of safe travel, and governments need to work with the private sector to enact new standards for safety, hygiene, testing and so on. Governments will also need to take steps to ensure that target communities are satisfied that the benefits of returning tourists outweigh any concerns about potential health risks. It is also necessary to strive to keep developing the domestic market and promoting a positive image after the COVID-19 pandemic
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Note: compiled based on the expert survey

Table 2

Response measures to reactivate the tourism industry

Discussion

As the experts say, the efforts to help should include information campaigns aimed at preventing the spread of the virus; support for companies and employees in the face of reduced working hours and temporary layoffs; liquidity injections and other financial instruments (e.g. tax breaks, guarantees, grants) to ensure business survival in the near future; procurement and late payment measures; actions to help travel agents introduce new business processes and find new markets.

The examples of initiatives of specific countries to support tourists and tourism workers are given in Table 3.

Country	Support measures for tourists and workers
Japan	Tourism Agency will spend 3.6 billion yen to provide international tourists with timely, accurate information and make travel destinations more attractive to attract tourists when the pandemic ends
Ireland	Fáilte Ireland has developed detailed guidelines for the tourism sector in collaboration with the tourism industry and relevant authorities to help travel companies comply with social distancing and cleaning requirements in line with the national protocol
Korea	Tourism is designated as a specific sector of employment support and is eligible for employment support providing up to 90% of annual vacation within 6 months to support the retention of jobs in this sector
Spain	The Ministry of Labor and Social Economy has developed guidelines on how to act on aspects related to work in the context of the coronavirus and the Ministry of Industry, Trade and Tourism – on best practices for enterprises and workers in the tourism sector

Note: compiled based on¹⁶

Table 3

Support measures for tourists and tourism workers

According to sources, the scale of the assistance packages that are being introduced to support and ensure the early recovery of travel agencies and destinations is enormous and extends to enterprises of all sizes throughout the travel supply chain. For example, Portugal has committed €1.7 billion to support accommodation providers, restaurants and travel agencies.

¹⁶ The impact of COVID-19 on the tourism sector. ILO Sectoral Brief. Retrieved from: https://www.ilo.org/wcmsp5/groups/public/---ed_dialogue/---sector/documents/briefingnote/wcms_741468.pdf

In Australia, the Aviation Assistance Package provides for the reimbursement and abolition of several government taxes levied on the industry, including excise tax on aviation fuel, domestic airline operations and charges for domestic and regional aviation security; the total cost of the measures is estimated at 715 million AUD¹⁷. While recognizing the exceptional nature of the challenges governments face in creating new programs at short notice¹⁸, the experts point out the urgent need to inject immediate liquidity for enterprises across the tourism supply chain. Initiatives to support enterprises and tourist destinations are presented in Table 4.

Country	Support measures for enterprises and tourist destinations
Australia	The guarantee system will support up to 40 billion AUD in lending to SMEs with a turnover of less than 50 million AUD, including individual entrepreneurs.
Brazil	The National Development Bank (BNDES) has opened a line of working capital loans for small and medium-sized tourism firms. This includes a 6-month break in loan repayment without delay in interest payments.
Canada	Tour operators in national parks, historical sites and marine reserves will be able to defer payments for commercial leases and licenses without interest.
Croatia	Several measures to support the tourism business have been implemented, including deferred payment of fees, tourism taxes and increased liquidity. The inclusion of tourism in the scope of the Export Guarantee Fund to provide guarantees for bank loans to obtain additional liquidity.
Korea	A total of 300 billion KRW (\$243 million) is being mobilized from the National Tourism Fund to support travel companies in the form of concessional unsecured financing, a general loan at a 1.5% interest rate and a grace period of one year. In addition, the rules have been relaxed to support the tourism sector in the COVID era: simplification of the hotel classification system, as well as the promotion of recreation and tourism in the forest, the introduction of special relaxed rules for the camping industry
Portugal	€900 million is for hotels and residential properties (of which €75 million is for micro and small enterprises), €200 million is for travel agencies, recreational services and event organizers and €600 million is for restaurants (€270 million from which are for micro and small enterprises).
Spain	Suspension of interest payments and loan payments for entrepreneurs in the tourism sector for one year. Postponement of interest and/or principal payments by regions to companies and self-employed workers affected by the crisis.

Note: compiled based on¹⁹

Table 4

Support measures for travel companies and destinations

¹⁷ T. Haryanto, "Editorial: Covid-19 Pandemic and International Tourism Demand", *Journal of Developing Economies* Vol: 5 num 1 (2020): 1-5.

¹⁸ E. V. Glinkina; L. M. Allanina; M. U. Yakhyaeva; V. A. Mushrub y D. I. Stepanova, "Formation of an action plan aimed at promoting tourists destinations", *Revista Inclusiones* Vol: 7 num Especial (2020): 371-379.

¹⁹ Briefing Note – Tourism and COVID-19. How are countries supporting tourism recovery? June 2020. UNWTO. Retrieved from: <https://www.e-unwto.org/doi/epdf/10.18111/9789284421893>; Covid-19 and Tourism: Assessing the Economic Consequences. UNCTAD. Retrieved from: https://unctad.org/en/PublicationsLibrary/ditcinf2020d3_en.pdf y Impact Assessment of the COVID-19 Outbreak on International Tourism. UNWTO. Retrieved from: <https://www.unwto.org/impact-assessment-of-the-covid-19-outbreak-on-internationaltourism>

The experts note that the main challenge is to modify pandemic mitigation measures into longer-term recovery and stimulus measures that can more effectively support the recovery of the sector, in particular, those viable enterprises that may be in distress, but are the key to the resumption of the functioning of the tourism system. It is also necessary to pay attention to what adjustments are needed in the current measures to better meet the needs of the tourism business.

Measures to restore and stimulate the tourism industry are presented in Tables 5 and 6.

Country	Coordination measures
Belgium	Regional working groups bring together government bodies and the private sector. They are working on post-COVID-19 recovery plans and conducting regular surveys. Useful information is compiled and disseminated, such as answers to frequently asked questions about the crisis and national and regional government responses to it
Greece	A government coordinating committee has been created, which includes representatives from all ministries. The strategic goals of the Tourism Recovery Committee are to reopen enterprises as soon as possible, keep destinations safe in terms of public health and support the entire value chain of the tourism industry (tourism enterprises and employees)
Ireland	The Department of Transport, Tourism and Sports has created a dedicated Observatory made up of industry representatives, government travel agencies and Department officials. The team, which has been meeting regularly since the onset of the crisis, monitors disruptions in the sector, facilitating the rapid exchange of information and assisting in the formulation of a recovery plan
Finland	Business Finland and Visit Finland organize webinars, for example, on scenarios and tourism recovery in Finland. Visit Finland has launched free online training materials, for example, on the digitalization of the travel business

Note: compiled based on²⁰
Table 5. Using coordination measures

Country	Measures to restore confidence and demand stimulation
Greece	The Ministry of Tourism and the Greek Tourism Organization launched an online platform called "Greece from Home" with the aim of strengthening the country's positive image during the pandemic
Japan	The Emergency Economic Package includes measures to actively stimulate tourism demand. Demand stimulation measures include a new subsidy of more than \$10 billion in rebates and consumer vouchers to support tourism, transportation, catering and events for immediate recovery from the pandemic. Japan Tourism Agency will spend \$2.2 billion on tourist attraction after the pandemic ends to make tourism destinations attractive, improve travel conditions and conduct promotions for foreign tourists

Note: compiled based on²¹
Table 6
Measures to restore confidence and demand stimulation

²⁰ Briefing Note – Tourism and COVID-19...; Covid-19 and Tourism: Assessing the Economic Consequences... y Impact Assessment of the COVID-19 Outbreak on International Tourism...

²¹ Briefing Note – Tourism and COVID-19...; Covid-19 and Tourism: Assessing the Economic Consequences... y Impact Assessment of the COVID-19 Outbreak on International Tourism...

Conclusion

The impact of the coronavirus pandemic is felt throughout the tourism ecosystem, and the discovery and recovery of tourism destinations will require a unified approach. Tourism enterprises and workers benefit from stimulus packages across the economy, with many governments also introducing special measures in the area of tourism. Governments and the tourism industry are now focusing their efforts on lifting travel restrictions and working with tourism enterprises to access liquidity, implement new health protocols for safe travel and help to diversify tourism markets, restore tourist confidence and demand stimulation, prepare comprehensive tourism recovery plans to rebuild destinations, encourage innovation and investment and rethink the tourism sector.

The results of the study confirmed the hypothesis of the study that in order to overcome the negative consequences of the coronavirus pandemic in the tourism sector, it is necessary to take appropriate measures to mitigate the consequences of the pandemic, followed by their transformation into longer-term measures to restore and stimulate the functioning of the tourism industry.

It can be said that the measures taken today will shape the tourism of tomorrow. In this connection, preparing the tourism industry for health improvement and shaping the tourism of the future may be a prospect for further research.

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