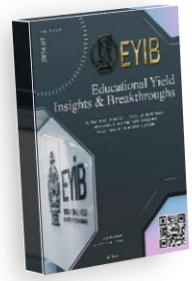
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The COVID-19 Pandemic and Tourism: A Multi-Level Synthesis of Global, European, Local and Traveler-Level Evidence

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Annotatsiya

The tourism industry has been affected like never before in recent history due to the effects of the COVID-19 pandemic. The purpose of this study was to understand the effects on different parts of the tourism industry using quantitative data. 5 sources were used from the years 2020-2021. These sources were the economic sector (Global), political (EU member states), city (Developing city in Vietnam) and personal (Travelers from Indonesia, Poland and USA). Secondary data was collected using a qualitative comparative method. No new data was collected. Original predictions indicated that international arrivals would fall by 60-80%. Airline revenues fell by approximately 55%. Between March 2020 and January 2021 an average reduction in overnight stays were seen within tourist accommodation in 24 EU countries. This ranged from 53.21% in the low impact cluster to 66.66% in the high impact cluster. Non-resident overnight stays fell by 75-81% in both clusters meaning the difference in impact was mainly down to domestic tourism. In Can Tho Vietnam managers had an average reduction of customers of 62.3% and revenue of 61.3%. Survey responses showed positive intentions to travel in the future with 78% of respondents in Jakarta intending to travel. Most people intended to travel within the next 6 months with a focus on short nature based breaks. It seems locations with a good domestic market, clear health measures and specific support for small businesses were more resilient to the effects of the pandemic.

Kalit so‘zlar: COVID-19, tourism demand, travel intention, tourism resilience, secondary data synthesis

1. Introduction

Tourism is one of the largest and fastest growing sectors within the global economy. The growth of international tourism has increased from approx 533 million in 1995 to 1.461 billion in 2020 (Haryanto, 2020). Visitor exports were worth US$8.9 trillion to world GDP, supported about 330 million jobs (one in ten jobs worldwide) and generated US$1.7 trillion in 2019, which made up 6.8% of total exports and 28.3% of total service exports worldwide. In 2018, half of all international arrivals were to Europe, followed by Asia-Pacific (25%) and the Americas (15%). Within a short period of time, the World Health Organisation (WHO) declared a pandemic due to the virus

'COVID-19' on the 11 th March 2020. There were 3,024,059 confirmed cases of this virus by the 29 th April 2020 in 213 countries/areas/regions (WHO). Governments enforced lockdowns, quarantines, visa cancellations and border closures. Due to tourism being a travelling based industry, this impacted greatly. Tourism can be seen as a vector for spreading infectious diseases, therefore leaving them more vulnerable (Roman et al., 2020). Tourism has faced challenges previously however this has never been on such a scale. During the 2003 SARS outbreak, it is estimated that 3 million tourism jobs were lost. Tourism throughout Asia dropped by approx 70%. However between 2000 and 2015, the only time international arrivals have dropped was during the SARS outbreak and the Global Financial crisis. These events didn't cause a lasting impact within the tourism industry (Roman et al., 2020). Due to the scale of the pandemic and the restrictions placed, this has made this crisis unique. Compared to the terrorist attacks on 11 th Sept 2001, the hotel industry has been impacted 9x worse (Haryanto, 2020). There is growing literature regarding the impacts from the pandemic. However, research has looked into different aspects of the tourism industry. Some research looks into macroeconomic indicators, some into how different countries have been affected, some into specific businesses in a certain destination and some into traveller intentions. This makes it difficult for students and practitioners to understand how this crisis has impacted tourism on a global, national, local and individual level. This article looks into the quantitative evidence from five studies completed between 2020-2021. There are three research questions answered:

How significant has the impact on tourism demand, income and employment been on a global, national and local level?

What destinations, sectors and businesses were most vulnerable and why? What does the data show about traveller behaviour and interventions?

2. Literature Review

Tourism is viewed as a fragile industry. In order to manage tourism disasters, Faulkner (2001) developed framework of what actions to take in each stage of a disaster. Ritchie (2004) emphasised that a strategic and holistic approach should be taken when managing a crisis. He highlighted it is important to consider the relationship between mitigation and preparedness and the relationship between response and recovery. Ritchie and Jiang (2019) did a review of 142 papers to show how far the field has developed over the years. The review led to a special issue of Annals of Tourism Research looking at tourism risk, crisis and disaster management. Health related crises such as SARS in 2003 have had an impact on tourism flows but have not caused a reduction in international arrivals between 2000 and 2015 (Roman et al., 2020). Pandemics previously have had a mainly idiosyncratic impact causing vulnerability in the domestic tourism sector (Škare et al., 2021). However the nature of this pandemic shows recovery will take longer than usual, usually 10 months. As this situation is extremely unique it is important to determine whether theories developed will apply. The impact of the pandemic on tourism has been researched very quickly after the initial border closures. Gössling et al. (2021) were some of the first to respond quickly. They highlight how different the pandemic is compared to previous epidemics and global crises, with over 90% of the worlds population affected by international travel restrictions. They argue that there should be reflection on the volume growth model that has been very promoted by tourism organisations. Hall et al. (2020) looked

at the impact of the pandemic on tourism and whether it will cause a transformation. Sigala (2020) looks at the impacts and opportunities of research by discussing the response, recovery and reset stages. Škare et al. (2021) used quantitative methods to do their research. They used panel structural vector autoregressive modelling and systems dynamics modelling on data collected from 185 countries. They concluded that coordinated public and private support was needed during 2020-2021. However, the fast publishing has been criticised. There is a danger of rushing to find gaps in research rather than carefully doing rigorous research (Zenker and Kock, 2020). Many patterns have been explained in previous research on crises and disasters. There have been two review articles published to capture the initial research (Yang et al., 2021; Zopiatis et al., 2021). This pandemic has caused changes in how tourists perceive risk. A survey was carried out by Neuburger and Egger (2021) in Germany, Austria and Switzerland asking tourists questions twice during March 2020, 2 weeks apart. Their results found that there was a significant increase in perceived risk of the virus and travelling. They also found changes in tourist behaviour. Cluster analysis showed there were 3 different clusters of tourists for both waves. Zheng et al. (2021) looked at the fear of travelling post-COVID-19 and how tourists are protecting themselves. Many surveys are looking at how likely people are to travel using famous behaviour theories. The survey done in Jakarta (Wachyuni and Kusumaningrum, 2020) used in this synthesis uses the Theory of Planned Behaviour (Ajzen, 1991). This theory explains intention by looking at attitude, subjective norms and perceived behavioural control. As these surveys were done at one point in time during the crisis, it makes it difficult to compare findings. For example, Neuburger and Egger saw changes in behaviour in only 2 weeks.

The main theme in all these papers was resilience. Resilience is important to create less volume dependant destinations (Gössling et al., 2021). It is mentioned by Sigala (2020) during the reset stage and Škare et al. (2021) during collaboration of public and private support. All 5 papers give examples numerically. Haryanto (2020) looks at global forecasts and statistics. Vărzaru et al. (2021) analysed the number of overnight stays in tourist accommodation across 24 EU members. Huynh et al. (2021) analysed the losses tourism businesses faced in Can Tho, Vietnam. Roman et al. (2020) and Wachyuni and Kusumaningrum (2020) did surveys with tourists in Poland and the US and Indonesia. Each paper answered a question from a different level. Most of the research I have looked at are conceptual and review articles. They give an agenda for research or show areas for research. This article looks at how evidence can be shown at a global, national, local and individual level. How much evidence is there from each level to back up or qualify evidence from other levels?

3. Methodology

This study is a qualitative secondary data synthesis undertaken using the principles of an integrative literature review (Snyder, 2019) to aggregate findings from various sources. It uses a narrative approach to data synthesis (Popay et al., 2006). The purpose of this study was to compare the data provided in the literature rather than to gather primary data. Due to varying data types (percentages, loss, Likert scale, proportions) the data could not be combined via statistical analysis so a comparison was made of the direction and magnitude of the data. RQ1 looks at comparing demand, income and employment indicators across each level of data. RQ2 compares subgroups

and RQ3 explores behaviour and mitigation strategies by travellers. A purposeful sample of 5 documents were analysed (Table 1). The sources have been purposefully selected meaning the synthesis is not representative of the whole literature. They were chosen because they were published between 2020 and 2021 (a), provided quantitative data on the impact of the virus on tourism (b) and could be placed in one of the four levels of analysis (c). This gives data from each level: Global (Haryanto, 2020), National/Regional (Vărzaru et al., 2021), Local/Business (Huynh et al., 2021) and Traveller (Roman et al., 2020; Wachyuni & Kusumaningrum, 2020). The first source is an editorial which collates forecasting data and statistics from international organisations meaning all data should be treated as estimates. The remaining four sources are all empirical providing either official statistics, business data from a survey (including interviews) or traveller data from a questionnaire. It is unclear when data was collected for Wachyuni & Kusumaningrum (2020).

Table 1: Sources used in Synthesis

Source Design Sample Timeframe Level

Haryanto (2020) Editorial Secondary Statistics Global Data from international organisations (IMF, WTO, UNCTAD, UNWTO, IATA, STR, AHLA) Early 2020 to approx April

Vărzaru et al. (2021) Cross sectional analysis (Neural Network, Clustering, Structural Equation Modelling), Literature review Data from 24 European Union countries (Eurostat, Worldometer) March 2020 to January 2021 National

Huynh et al. (2021) Mixed Methods (Interviews and Questionnaire) 40 Interviewees & 280 Business Managers Can Tho Vietnam Interviews Oct-Nov 2020 Survey Dec 2020-Mar 2021 Local/Business

Wachyuni & Kusumaningrum (2020) Descriptive Online Survey (Theory of Planned Behaviour) 128 Respondents Jakarta Indonesia Feb-April 2020 Individual

Roman et al. (2020) Diagnostic Survey (Questionnaire) 564 respondents (Poland) & 133 respondents (USA) April-May 2020 Individual

[Note: Table created by myself.]

Data was coded for each source indicating what indicator, unit of analysis, timeframe and population was being looked at. Indicators were also coded for what level of analysis they related to and what RQ they related to.

Comparisons were made between indicators at each level of data (International vs Domestic demand) and within each level of data (Clustered EU Countries or different types of tourism businesses). Comparisons were made between the direction, magnitude and consistency of data. Key findings were identified where results were consistent across more than one source and level of data. These have been elaborated on in the discussion. Where there were conflicting results between two sources, both results were included. Where data was conflicting in one source (text vs tables), the table data was generally used. This has been explained in the footnote. All data in the results section has been sourced from the 5 sources. The data has been presented as found in the original sources with authors cited. Only simple calculations (addition, subtraction & averages) have been completed by myself. This has been indicated in the footnote. Results from the tests (ANOVA, SE modelling and importance scores from neural network) have been presented as found in the original sources. No formal bias score was given, due to the purpose of this study being to compare patterns. However,

they were described to give an overview of how generalisable the data was. Whether the data was an estimate or actual number, how many people were in the sample and what sampling method was used to collect data. How long the data was collected for and whether there were any inconsistencies within the data. This has been noted in the footnotes and discussed in the discussion. No intercoder reliability was completed as only one author coded the data. This means the data has been double checked from the tables in the original articles. Ethical approval was not required as this study only used published secondary data and no human participants.

4. Results

This shows that there was a 3% decline in global economic growth (Haryanto, 2020). Tourism was almost completely restricted globally, with 93% of European destinations fully closing their borders compared to 60% in Africa. There was a 22% reduction in international arrivals during the first quarter of 2020. A sharp decline occurred during March (UNWTO). If there is a reduction of 60-80% during 2020, 100-120 million jobs could be lost. The forecasts are quite volatile. Initially they predicted a 1-3% decline in March 2020 (6 th March 2020) however by 26 th March 2020 they were predicting a 20-30% decline (Roman et al., 2020). IATA predicted a reduction of $314 billion in air revenue. This is a 55% reduction in air revenues compared to 2019. This meant approximately half of the global hotel industry (approx. 212million people) lost their jobs (Vărzaru et al., 2021).

Nationally, Vărzaru et al. (2021) analysed the overall change in the number of nights spent in tourist accommodation across 24 EU member states between March 2020 and January 2021 compared to the same period in 2019. They found there were two clusters and two outlying countries (Table 2). All countries experienced a reduction in total nights. Cluster 1 (Netherlands, Denmark, Sweden, Finland) had an average reduction of 53.21%. Cluster 2 (Spain, Italy, Greece, Hungary, Portugal) had a larger reduction of 66.66%. The biggest reduction was seen in Malta (-79.62%) and Spain (-79.19%).

Table 2: Average % Change in Number of Nights Spent in Tourist Accommodation (March 2020 – January 2021)

Group Country n Total (%) Resident (%) Non-resident (%)

Cluster 1 (Least Affected) 9 -53.21 -25.99 -75.06

Cluster 2 (Most Affected) 13 -66.66 -52.42 -80.92

Outliers (Malta, Slovenia) 2 -70.96 +7.50 -83.74

Note: Data is compared to the same time period in 2019. Source: Vărzaru et al. (2021) Table 3.

There was a much smaller difference in non-resident tourism than resident. Cluster 1 saw a reduction of approximately 3/4 of non-resident nights (-75.06%) and Cluster 2 saw a reduction of approximately 4/5 of non-resident nights (-80.92%). This meant there was only a 5.86% difference between Cluster 1 and 2. However, Cluster 1 showed a large reduction between resident (-25.99%) and Cluster 2 (-52.42%). This meant there was a 26.43% difference. Malta and Slovenia saw an increase in resident nights however a significant reduction in non-resident nights. Overall, the countries that were least affected were those who still had domestic tourism. A multi-layer perceptron model showed the number of deaths due to COVID-19 was a better indicator than the number of confirmed cases. There was a negative effect on intention

to travel due to deaths per million inhabitants (-0.649). However, there was a strong positive effect on tourism activity (0.820) and change in GDP per capita (0.945).

Locally, Huynh et al. (2021) researched the impact on the tourism economy in Can Tho, Vietnam. This involved 40 in-depth interviews and a survey with 280 business managers. Overall, there was a reduction in total arrivals (36.8%) and revenue (28.6%) in 2020. International overnight visitors decreased by 72.7% however domestic overnight visitors only decreased by 26.5%. Approximately 45.9% of direct tourism workers stopped working in the industry. 49.3% of business managers said it had a serious impact and 40.0% said it had a very serious impact. On average businesses lost 62.3% of customers, 61.3% of revenue and 50.3% of staff. Different sectors were affected more than others (Table 3). Tourist Attractions and Fruit Orchard Sites lost the most customers and revenue. Attractions lost the most staff (74.3%). Travel Agencies lost the most revenue. There was a significant difference between the sectors for customers lost (P≤.003), revenue lost (P≤.003) and staff lost (P≤.003). However, there was no significant difference in the number of customers and staff lost.

Table 3: Impact ofCOVID-19 on Tourist Businesses by Sector (Can Tho)

Sector Customers Lost (%) Revenue Lost (%) Staff Lost (%) Revenue Lost (VND Million)

Accommodation 58.4 58.3 46.4 2337.7

Travel Agency 65.8 64.2 39.5 11336.9

Dining Establishments 53.4 54.7 39.2 1577.9

Tourist Attractions 67.8 66.5 74.3 263.2

Tourism Fruit Orchards 68.5 65.3 63.0 240.5

Note: Data is the average for each sector. Source: Huynh et al. (2021) Table 4.

The survey shows there was a reduction in demand. In Jakarta (n = 128), 41% of people were aged between 21-30. 78% of people would like to travel after the pandemic with most wanting to travel within the next 6 months (65%). Most people wanted to do nature-based tourism (66%) and travel for 1-4 days (56%). The most important factors for them were safety (73%), cleanliness (64%) and beauty (62%). Half would choose a destination with fewer patients with COVID-19. The average score for positive attitude, social norms and perceived behavioural control questions were 3.77-4.34 (Mean=4.07). The average score for anxiety questions were 2.08-2.59 (Mean=2.27).

Roman et al. (2020) carried out a survey with 564 Polish and 133 US residents in April and May 2020. Approximately 68% of people overall intended to go on a tourist trip in 2020. However, the pandemic had a large effect on behaviour. Many people decided to take a holiday domestically. However, approximately 1/3 of Polish people and nearly 60% of US people said they were discouraged to the point of staying at home or postponing their trip. The main reason for travel was leisure (Poland=85.7%, USA=68.4%). The main type of accommodation chosen was hotels (Poland=40.4%, USA=56.4%). Polish people travelled mainly by their own car whereas the USA travelled by plane.

Vărzaru et al. (2021) identified different ways to measure resilience at three levels (International, National, Industry) and four types (Financial, Economic, Sanitary, Labour). Nationally there was public guaranteed loans, delaying debt and business tax and covering unemployment benefits. At an industry level there was high sanitation standards, virtual experiences and staff training. Internationally there was

financial assistance to countries that rely on tourism and standardised safe travel protocols. The business managers in Can Tho identified promoting domestic tourism, developing new products and ensuring safety as the most effective solutions. The government provided a stimulus package focusing on domestic tourism which increased capacity to approximately 60% during the second wave of infections. In order to ensure tourists feel confident, destinations need to increase trust in their safety and health (Wachyuni and Kusumaningrum, 2020). It has been estimated it will take between 10-35 months for the industry to return to normal.

5. Discussion

Overall, the case study highlights a variety of impacts from shock on different areas of the world. The trends identified were: 1) Global demand has dropped but domestic demand has provided some relief. Both clusters have seen non-resident nights drop by between 75-81% within EU. The key difference between the two groups is the more impacted saw greater drops in domestic tourism (-26%) than those less impacted (-52%). This trend was mirrored in Can Tho, where overseas demand fell by 72.7% and domestic by 26.5%. High domestic behaviour from Polish and US respondents and the stimulus package from Vietnam highlight how people have turned to close destinations due to closed borders and awareness of the risk. Destinations with high domestic markets bounced back quickly. 2) Concerns over health. The EU model saw higher deaths per million had a negative impact on willingness to travel. In Jakarta half of respondents would look for places with less people with the virus. Safety was the highest factor (73%), followed by cleanliness (64%). This shows that success in public health and clear communication has become a selling point for tourism. 3) Responses were positive towards destinations. High intentions were found in Jakarta (78%) however the average reduction in the number of nights stayed in EU is large (53-67%). In Roman et al (2020) 60% of respondents from the US were staying at home or postponing travel. This does not contradict the survey results as they were conducted between February-May 2020 and therefore uncertainty around the future of the pandemic existed. The accommodation data provides real data up until January 2021. The respondents in Jakarta were also young. 4) Labour intensive and small businesses were most at risk. On average attractions in Can Tho have lost 74.3% of staff. Globally hotels have lost approx 1/4 of staff. Small businesses had difficulty surviving long periods of lockdown due to lack of funding. (Huynh et al, 2021; Vărzaru et al, 2021). This shows that government funding was seen as very important to managers but was not very effective. Destination managers and policymakers should: 1) Work on increasing domestic demand and diversifying sources of tourism. Domestic tourism was seen as the most reliable relief. 2) Create, certify and clearly communicate health and safety processes. Safety was one of the top factors for tourists. 3) Create products to meet the new trends. Tourists want short, nature based and less crowded holidays. This means for heritage destinations creating products that work alongside monuments and museums such as outdoor, small group and local. 4) Provide funding to small businesses. Labour intensive businesses should be supported through measures to keep jobs such as loan guarantees, tax deferral and subsidised short time working. This study has some limitations. It was a combination of 5 different sources, meaning purposeful sampling was used and not all sources were included. They do not use the same metrics, sample population or time frame meaning comparisons could be made but data could

not be combined. Multiple sources used non probability sampling. Predictions were made in the early stages of the pandemic (Haryanto, 2020) which have now been replaced by real data. None of the sources provide any information on recovery past early 2021. There were some inconsistencies within some sources (footnote). Future research should look to collect data at both business and tourist level from the same destinations. Longitudinal data should be used to understand recovery. Further research should also be done on whether the domestic market buffer seen in Europe and Vietnam would occur in Central Asian destinations and other heritage based destinations.

Conclusion

The international tourism industry has had significant impacts from the COVID-19 pandemic, with initial estimates of a 60-80% drop in 2020. The literature shows that the most affected areas are international tourism, small business and labour intensive industries. Key factors that helped increase resilience in the industry were domestic tourism, good health practices and timely public support. Tourists were found to have positive attitudes to travelling, focusing on short and safe nature based holidays. Initial survey results show an overly optimistic attitude to recovery. Overall it can be seen that increasing a resilient tourism industry should be done before the crisis through market diversification, flexible products and support systems.

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