

FUTURE OF TOURISM AND COVID-19 CRISIS: THE PARADIGM SHIFT

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Abstract

The COVID-19 crisis has led to major changes in economic and social relations around the world. These changes have not bypassed the tourism industry, which is disproportionately more affected than other economic activities, due to numerous restrictions imposed on passengers and companies for the transport of goods and passengers. In order for the tourism economy to recover as quickly as possible and establish stable business, it is necessary to overcome current obstacles through the implementation of inventive solutions. Thus, the paper focuses on main obstacles imposed by COVID-19 pandemic and government restrictions on tourism industry and their influence on tourism business model which has been called into question. The goal of the paper is to analyze key factors affecting the tourism industry, as well as to produce possible directions for future development after the establishment of normal conditions in the tourism market. In that sense, the emphasis was placed on sustainable development of tourism, further digitalization, strengthening of eco-tourism and personalization and customization of services.

Key Words: *COVID-19 crisis, tourism, management, shifting tourism paradigm*

JEL classification: *E0, Z32, H12, Z30*

Introduction

Modern tourism is facing the biggest crisis in the 21st century caused by the emergence of a new coronavirus SARS-CoV-2 caused by Corona Virus

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Disease or COVID-19 (Uğur & Akbıyık, 2020; Tran et al., 2020). This respiratory virus was first registered in China in December 2019 (Han et al., 2020; Noorashid & Chin, 2021; Kim et al., 2021) and has since spread to almost the entire planet. Given that the virus spread very quickly, there were a number of consequences reflected in the expected consequences for public health (Noorashid & Chin, 2021) and the health of each individual exposed to the virus, but also, perhaps not so much expected, the consequences for everyday life and economic consequences for the World economy as well as for the personal wellbeing (Khalid et al., 2021; Zhang et al., 2021). These consequences are a direct result of the decisions of most countries to impose various restrictions in order to slow down or prevent the spread of the virus. These restrictions are reflected in the restriction of movement (Andrei & Drăgoi, 2021; Kim et al., 2021), interruption of airline flights, closure of non-essential businesses, ban on gathering large groups of people indoors and outdoors, cancellation of major events, closure of borders (Tran et al., 2020; Zhang et al., 2021) etc.

Unfortunately, this has led to an unprecedented blow to tourism, as non-essential businesses and high-risk places for the spread of the virus include hotels, restaurants, bars, spas, entertainment venues (Collins-Kreiner & Ram, 2020; Uğur & Akbıyık, 2020; Khalid et al., 2021), but also cultural facilities such as museums, galleries, theaters, cinemas and the like. The consequences of these closures, which did not completely stop two years later, nor was the hospitality industry normalized at the pre-pandemic level (Ntounis et al., 2021), are reflected in the reduced number of tourists, overnight stays (Andrei & Drăgoi, 2021; Milovanović, 2021), hospitality services consumption etc., which directly affected the decline in the number of employees in the hospitality industry (OECD, 2020; Stojanovska-Stefanova & Magdinceva-Sopova, 2021; Allaberganov et al., 2021). Overall losses for tourism industry as well as World economy are huge. According to the United Nations World Tourism Organization (UNWTO), the number of international tourist arrivals in 2020 and 2021 is close to 1.1 billion less than in 2019 or a total of almost 2.2 billion fewer tourists. That is a drop of 73% and 72% respectively, and that has never happened before in modern tourism (UNWTO, 2022).

How quickly will tourism recover depends on a number of factors, and the UNWTO in its UNWTO Panel of Tourism Experts as a key obstacles in normalization of travel identified travel restrictions (83% of respondents identified as the main obstacle to normalization of travel industry), slow

virus containment (59%), low consumer confidence (52%) and economic environment (36%) (UNWTO, 2022).

Literature Review

The current COVID-19 pandemic and the resulting tourism crisis and the restrictive measures taken to stop or slow down the spread of the virus are just one of the crises that have hit tourism in the 21st century. There have been several major crises, most notably September 11th terrorist attacks in 2001, the severe acute respiratory syndrome (SARS) in 2003, the Indian Ocean earthquake and tsunami in 2004, the World Economic Crisis and the H1N1 epidemic in 2009 and the Middle East respiratory syndrome coronavirus (MERS-CoV) in 2012 and 2015. So, there were several crisis events that we can classify into four groups: security crises, economic crises, natural disasters and health crises.

When it comes to previous health crises such as SARS and MERS epidemics, which were also the most widespread, the literature is mainly focused on the economic effects of the crisis in the regions most affected by these crises (Au et al., 2005; Wilder-Smith, 2006; Chen et al., 2007; Tanaka, 2022; Edwards & Ott, 2021). In addition, a number of papers focus on changes in consumer behavior due to fear of disease (Kim et al., 2017), the need for prevention (Al-Tawfiq et al., 2014; Pavli et al., 2014) and crisis management and the response of states, organizations, and international institutions to health challenges (McKercher & Chon, 2004).

Regardless of the fact that these are basically similar crisis events, ie health crises, they differ to a certain extent in their manifestation and effects on tourism in relation to the COVID-19 pandemic. The main difference is in the number of infected, which was much less during the SARS and MERS epidemics (Tanaka, 2022). This has meant that the number of deaths recorded during the COVID-19 pandemic significantly exceeds the number of deaths during the SARS and MERS pandemics despite the significantly higher mortality rates recorded during these epidemics (Al-Tawfiq et al., 2014; Pavli et al., 2014; Kim et al., 2017; Yang et al., 2021). There is also some similarity between the COVID-19 pandemic and the SARS and MERS epidemic when travel restrictions and quarantine restrictions were observed, but the difference is that the restrictions are mainly imposed on the East and Southeast Asia region and its tourists as well as within the region (McKercher & Chon, 2004; Au et al., 2005; Chen et al., 2007, Kim et al., 2017).

One of the basic reactions of men, but also of the economy to the unknown is the fear of possible consequences. It has already been noted that fear has greatly changed consumer behavior during SARS and MERS epidemics. Excessive fear and reaction to the epidemic was noted during the SARS epidemic in East and Southeast Asia in 2003. On that occasion, in addition to exaggerated and inaccurate statements about the dangers of the virus, the travel industry was identified as one of the main channels for spreading the epidemic due to the unfortunate fact that the world's major media identified one hotel as a "ground zero". The result is panic over tourist travel, and the direct result of that panic is 3 million lost jobs in the tourism sector of China, Hong Kong, Singapore and Vietnam, a decline of over \$20 billion in GDP in these four economies and a drop in the number of tourist arrivals of about 70% in Asia (McKercher & Chon, 2004). Au et al. (2005) compare the consequences of this crisis to the previous global economic crisis of 1997. Kim et al. (2017) analyzed the changes that occurred during the MERS epidemic in Seoul in 2015. Despite the fact that a relatively small number of patients were recorded during this epidemic, there were significant changes in the behavior of individuals and society. These changes were reflected in a reduced number of trips of as much as 11.8% and a reduced number of participants in travel of 10.8%, a number of primary schools were closed, and students who continued to attend classes instead of public transport were driven by parents, there has been a decrease in the use of the subway by tourists and the locals, etc. The COVID-19 pandemic did not bring anything new in the behavior of tourists, tourism industry and the state, and almost identical reactions were repeated this time as well. (Han et al., 2020; Gössling et al., 2020; Tran et al., 2020), but even more intensely over a longer period.

The COVID-19 pandemic has not only hit tourism in a way never seen before, but the duration of this crisis and global presence is something the travel industry has never encountered before (Yang et al., 2020; Yang et al. al., 2021). In order to better explain and monitor the effects and manifestations of this crisis as well as to identify the best response to similar future crises, a number of authors propose and introduce various analytical tools. Yang et al. (2020) propose the "COVID19 tourism index" as a tool to monitor the effects of the pandemic on tourism and provide possible responses to them. They propose a basic index consisting of three sub-indexes and two independent sub-indexes (aviation and hotel sub-indexes). On the other hand, Anguera-Torrell et al. (2020) deal with the response of urban destinations to the challenges of the COVID-19 crisis, i.e. measuring the performance of these destinations during the crisis. For

this purpose. they propose the Urban Tourism Performance Index (UTPI) for a month-to-month data analysis of urban destinations performance and to monitor future recovery paths. In addition, Duro et al. (2021) propose the Tourism Vulnerability Index to COVID-19 (TVI-COVID) as a comprehensive tool for measuring the vulnerability of the tourism sector within a destination and identifying opportunities to reduce vulnerability.

It is clear that the COVID-19 crisis is an unprecedented event for the tourism industry and based on previous experiences, only to some extent answers can be given to these challenges. The response of the tourism industry, states and international organizations, at least for now, was primarily economic in nature and varied due to numerous economic and social factors, the most important being the economic strength of states and companies, the importance of tourism for the overall economy (Khalid et al., 2021), the size and number of activities that partially or completely depend on tourism (Ntounis et al., 2022; Helble & Fink, 2020), the number of employees in tourism and related activities and the like. However, given that most economic responses are short-lived and unsustainable in the long run, with a number of changes observed on the side of tourism supply and demand fueled by the COVID-19 crisis, the dilemma arises as to whether these changes are immediate and transient after the normalization of the situation or a comprehensive paradigm shift will occur within the tourism industry.

Methodology

Method that was used in this study is Document Research Method - DRM. It is a systematic approach to the analysis of professional and scientific content that can be found in print as well as on the web. According to Bailey (1994), this method is very useful when researchers study documents that also deal with the same or similar researched content. Materials were obtained from Google and Google Scholar search engines with combination of key words relevant to this research, and authors have selected 50 papers they considered most relevant to cover broad range of this topic.

Tourism strategies for the future

Since the beginning of the COVID-19 pandemic, the scientific and professional public has tried to identify topics and trends that will shape

tourism in the future, in order to lay the foundations and make recommendations for further work of the tourism sector locally and globally in order to develop new sustainable and inclusive perspectives on travel and tourism. World actors such as UNWTO, OECD, WTTC Travel & Tourism Task Force and others have developed a range of measures, standards and protocols as a proposal to governments to relaunch tourism, protect workers, restore passenger confidence and ensure a stable recovery in the medium and long term. The common opinion that stands out is that in order to successfully reopen the tourism economy and start businesses, coordinated action between market actors and the state is needed.

The “global economic crisis has had far-reaching consequences on the economy of all countries around the world, slowing economic growth globally due to the falling demand in the developed economies” (Štetić et al., 2012; Ilić & Leković, 2016, p 256). Sharma et al. (2021, p 8) point out that by building inclusive resilience of the tourism sector with the help of four factors: government response, technological innovation, local affiliation and trust of consumers and employees, the tourism industry can be transformed “into a new global economic order characterized by sustainable tourism, social welfare, climate actions and involvement of local communities”. Vargas-Sánchez and Rodríguez-Toubes (2021) believe that a more diverse client base and a more flexible administrative and legal framework are important for the development of resilient tourism, as well as the development of a resilient organization through organizational learning. Fitriasari (2020) in his paper points out that the three important elements of organizational resilience are product excellence, people behavior, and process reliability, and that business resilience is supported by digital transformation.

In his matrix of potential evolutionary paths towards tourism transformation, Brouder (2020) showed that tourism will be transformed only if sufficient innovation of institutions occurs, both on the supply side and on the demand side. Postma & Yeoman (2021) concluded in their paper that the future development of travel and tourism systems, determining strategic directions of development and ensuring long-term productivity can be set correctly only with the help of strategic forecasting and scenario planning.

Assaf et al. (2022) in their research has identified following areas that the tourism sector should be more focused in post Covid 19 period such as: “consumer behavior, demand and performance modeling, forecasting,

destination and facility management, information technology, and quality of life” (p 455).

Based on the analysis of the current situation in the tourism sector both globally and locally and published scientific and professional papers dealing with similar topics, the authors set a strategy for future development of a sustainable tourism sector, highlighting the most important factors influencing its design (Scheme 1).

Scheme 1: *Strategies for reshaping tourism future*



Source: *Author's own elaboration*

The reactive role of the government in creating a sustainable and resilient tourism sector - With the outbreak of the COVID-19 epidemic, most European and world countries have closed their borders to all but necessary travel, putting the tourism and hospitality sector in a very unenviable position. Closing borders, restricting the work of catering facilities, bans on gatherings have led to a drastic reduction in income and employees in these and related sectors.

Due to the growing number of new destinations around the world and investments made in these destinations, tourism has become one of the largest and fastest growing sectors and the main driver of socio-economic development through job creation and enterprises, export revenues and infrastructure development (Ilić & Obadović, 2017). That is why governments are playing key role to the preservation and recovery of the tourism sector and its further development. The main role of governments in the recovery of the tourism and hospitality sector is to restore their functionality and provide conditions for their smooth further work and development. There are several ways governments can help the tourism and hospitality sector. The authors' proposals after the analysis of professional and scientific literature are as follows:

- Providing financial assistance to the tourism and hospitality sector through wage schemes, tax breaks or deferrals, pay-outs and even skills programs, is a necessary measure that will enable the survival of companies in this sector and related sectors, in conditions when the state restricts or prohibits fully the work of these enterprises.
- Government's measures to restore confidence in travelers and encourage them to book a visit as restrictions ease, through various creative solutions and promoting the adoption of measures in the field of hygiene and health, for instance, free COVID-19 insurance during their stay. One of the most significant measures taken within the European Union to relaunch EU travel is the development of the Digital COVID Certificate (DCC).
- Stimulating the demand for domestic tourism. A positive example of this measure is the example of the Government of Serbia, which set aside 2.8 billion dinars for the distribution of 560,000 tourist vouchers worth 5,000 dinars each to strengthen domestic tourism (Ilic et al., 2021; OECD, 2021).
- Collaboration with the private sector to determine what kind of assistance would be needed in different crisis scenarios and design the most effective policies for companies large and small (WTTC, 2021).
- Understanding the effect of crises on Travel & Tourism, address how governments can enable the sector's future resilience (WTTC, 2021).

Further development of domestic tourism and strengthening of small businesses – border closures and travel restrictions, as well as a number of restrictions imposed in many countries around the world such as mandatory quarantine or mandatory COVID 19 tests on entry, have influenced tourists'

attitudes and attitudes towards travel to domestic rather than international destinations.

Research conducted as part of the 'ERIA Research on COVID-19' project at the Economic Research Institute for ASEAN and East Asia (ERIA), (Chan, 2021), which aimed to explore the potential of domestic tourism as a means for the revitalization of the tourism industry from the perspective of the local population and tourism actors found that “domestic tourism has the potential to revive the tourism industry“ (page 1), and that many respondents wanted to take advantage of discounted travels within the country.

In the summer period of 2020, the arrivals of domestic tourists in Serbia are significantly increasing compared to the previous three years. A similar growth trend of domestic tourist arrivals is noticeable until July 2021 (Ilić, et al., 2021). Tourism actors have recognized the potential for renewal and revitalization of the tourism industry and business through domestic tourism. Tourism flow simulations conducted by Arbulú et.al, (2021), suggest that in conditions in which the influx of foreign tourists is prevented, redirection to domestic tourism is a good strategy. Domestic tourism will certainly gain more importance in the future than it has had so far, bearing in mind that complete freedom of travel will not be established in the near future as it has been so far.

This means a reorientation of domestic capacities in the direction of attracting more domestic guests than it has been so far and the possibility of developing new, especially small companies that will cover the increased demand for domestic destinations. For small businesses, this implies a chance for further growth and development and improvement of existing capacities. New thinking on small business financial support in the future will be vital to tourism stability.

Hotels will need to make key operational changes to survive in the world of COVID-19. They will have to look to the future and adjust their approach to recovery to meet new segments of travelers (such as domestic travelers), shorter deadlines for reservations and new channels for the source of reservations. It will also be necessary to implement new marketing strategies that are relevant, such as communicating the necessary steps that the hotel takes to ensure the safety of passengers and inspire their confidence to book just that facility (Guillot, 2022).

Moving away from mass tourism and adapting to the specific needs of travelers - As more and more people are able to work from home and use technology everywhere, personalization and technology are becoming a key factor in attracting this group of people. Travelers expect new experiences that will be more personal and focused on their separate needs. Highly personalized, unique experiences, authenticity and obtaining all the necessary information on the click become the norm to meet the needs of tourists. This places demands on domestic tourism companies to provide themselves with a competitive advantage, to adapt their business and offer guests what they are looking for, which are personal, authentic, and sustainable journeys and experiences.

Sector digitalisation - Digitization is very important for building the resilience of the entire tourism sector. The development and encouragement of digitalization opens up new marketing opportunities, promotion and development of new products and destinations. Human capital and the development of a skilled workforce is an additional advantage of the digitalization of the sector (OECD, 2021).

Digitalization encourages innovation and more efficient use of resources, which can have a positive impact on the environment. With a development of smart facilitations that are used in travel such as smart visas, smart borders, facilitated security controls and infrastructure, travelers has much easier access to all travel and security clearances (UNWTO, 2022; Štetić et al., 2020). Smart destinations has also emerged with a digitalization era. “It is one with a strategy for technology, innovation, sustainability, accessibility and inclusivity along the entire tourism cycle: before, during and after the trip. VR tourism is definitely taking over, presenting indoor and outdoor tourism attractions” (<https://www.unwto.org/digital-transformation>). Need of new skills will create a new job profiles that will be able to manage and implement all this inovations that comes with a digitalization.

Development of eco-tourism – Eco tourism is a popular alternative to mass and commercial tourism. According to the International Ecotourism Society, ecotourism is “responsible travel to natural areas that conserves the environment and improves the well-being of local people.” With today’s growing health concern’s, eco-tourism is taking a stronger and more visible place in travelers choices. This will shape all tourism sector to be eco oriented, which will have much larger impact beyond just one sector. Using electric, instead of conventional vehicle, including organic

food in regular offer which will make food industries to orient more to growing bio food, installation of energy saving devices, smarter water saving devices, recycling, and other actions toward ecofriendly tourism, will not only attract growing population of tourists but will benefit whole environment.

Emphasizing efforts in the field of hygiene and health - Promotion of safe health practices has become very important in regards of sustainable tourism principles. Fenton (2020) takes into consideration that tourism sector can use the increased health awareness and makes advantage for themselves by emphasizing the visitors greater wellbeing. New guests, collectively known as "Generation Clean", are waiting for hotels and other catering facilities to deeply clean and disinfect areas with a high degree of contact. Scrupulous processes and procedures of cleaning and disinfection will be vital for the implementation of cleanliness standards (OECD, 2021). All parties involved benefit from emphasizing efforts in the field of hygiene and health. Tourists will gain health benefits, while destinations will gain economic benefits and can continue to operate safely and sustainably. In view of this point, a positive example that can be highlighted is HORES³, which has, following the example of the national European association's members of HOTREC⁴, created a seal „Clean & Safe”, which is a recognizable sign for hotel facilities, by which potential guests would know that the facility or content is adequately prepared for virus control.

Conclusion

The Covid era has shown us that mass unforeseen events are possible and can easily happen again in the future. In order to survive in such an unpredictable and turbulent environment, we need to learn to adapt and be ready to face the coming challenges. For tourism, this implies a complete orientation towards a flexible business model that will meet the growing needs of passengers on the one hand and ensure the survival of the sector in conditions that exclude the sector from the established business model.

The authors presented the challenges facing the sector in the post-COVID-19 era and give suggestions for its preservation and development.

³ HORES - Business Association of Hotel and Catering Industry of Serbia

⁴ HOTREC is the umbrella Association of Hotels, Restaurants, Bars and Cafes and similar establishments in Europe, which brings together 47 National associations in 36 countries, and is the voice of the hospitality industry in Europe.

Innovative solutions such as digitalization can create new business opportunities and new jobs and skills in order to make the sector more competitive and sustainable. Post-Covid world has increased conscious of “living healthier” and “clean world”, which puts in focus Eco tourism as a strong alternative to the current mass tourism. We need clean air and a green environment to survive in the next generation. In order for tourism to take place in the post-Covid period, cooperation between the private and state sectors is needed. All actors in tourism, with the support of governments, must mutually develop strategies for the further development of the sector, while maintaining and improving its authenticity (Fenton, 2020).

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