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When We Travel Again (Responsible) Tourism After COVID-19

Innovation. Responsibility. Resilience.

De:
Planeta Formación y Universidades

TTBB
Responsible Travel Insider

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Introduction

The global pandemic has forced everyone to slow down, if not to stop. The management capacity of governments has been severely tested, the economy has never been so fragile, and society has had to fight an invisible and lethal enemy that has added to problems such as social exclusion and unemployment. The goal of this book is to resist, and to react. Even motionless. When we travel again. (Responsible) Tourism after COVID-19 wants to act as an investigation to support those who, in one way or another, are part of the tourism sector and support sustainable choices. Tour operators and agencies, receptive structures, consultants and academics, travelers: all are part of this dynamic world that pushes us not only to move constantly, but that gives us the opportunity to grow as individuals and also do good, when operating responsibly and in compliance with the principles of sustainability.

The first section of this research work starts analysing the global tourism trends over the last five years, to prepare the ground for a better understanding of the future of tourism after COVID-19. Then, it focuses on the concept of "crisis" within the tourism sector, with reference to three different categories of emergencies: terrorist attacks, epidemics, and natural disasters. Finally, it explores the origins of the COVID-19 pandemic and how it spread all over the world; while also analysing on the global environmental, economic, and social consequences that have occurred.

The second section goes through some case studies, covering different countries which the authors know particularly well because they are natives or residents: Colombia, Ecuador, Italy, Spain, United States of America. For each of them, not only are the effects of the global pandemic discussed, but also the measures proposed by governments to safeguard the country's well-being and support the tourism sector, fundamental for all the nations mentioned.

The third section starts by exploring how the tourism industry reacted to survive the crisis, through innovation and diversification. After that, it was possible to forecast the tourism industry. Then, a survey, conducted in April, and its results, contributed to the generation of findings, recommendations, and models for the public and private sector (including business ideas and public implementation and strategies).The work ends with the section dedicated to policies and certifications, by presenting a mitigation model for tourism crisis management.

What this work aims to prove (or disprove) is whether, after the global pandemic, travelers will change their behaviour and traveling schemes, becoming more responsible in consuming experiences and moving around the globe; and, eventually, if the tourism industry will be able to evolve and shift towards a more sustainable model, being able to influence travelers with some support from the private and the public sector.

Before the COVID-19 pandemic:
Global trends and crises in the tourism industry

01

Tourism World Wide Trends

Johanna Coral Flor

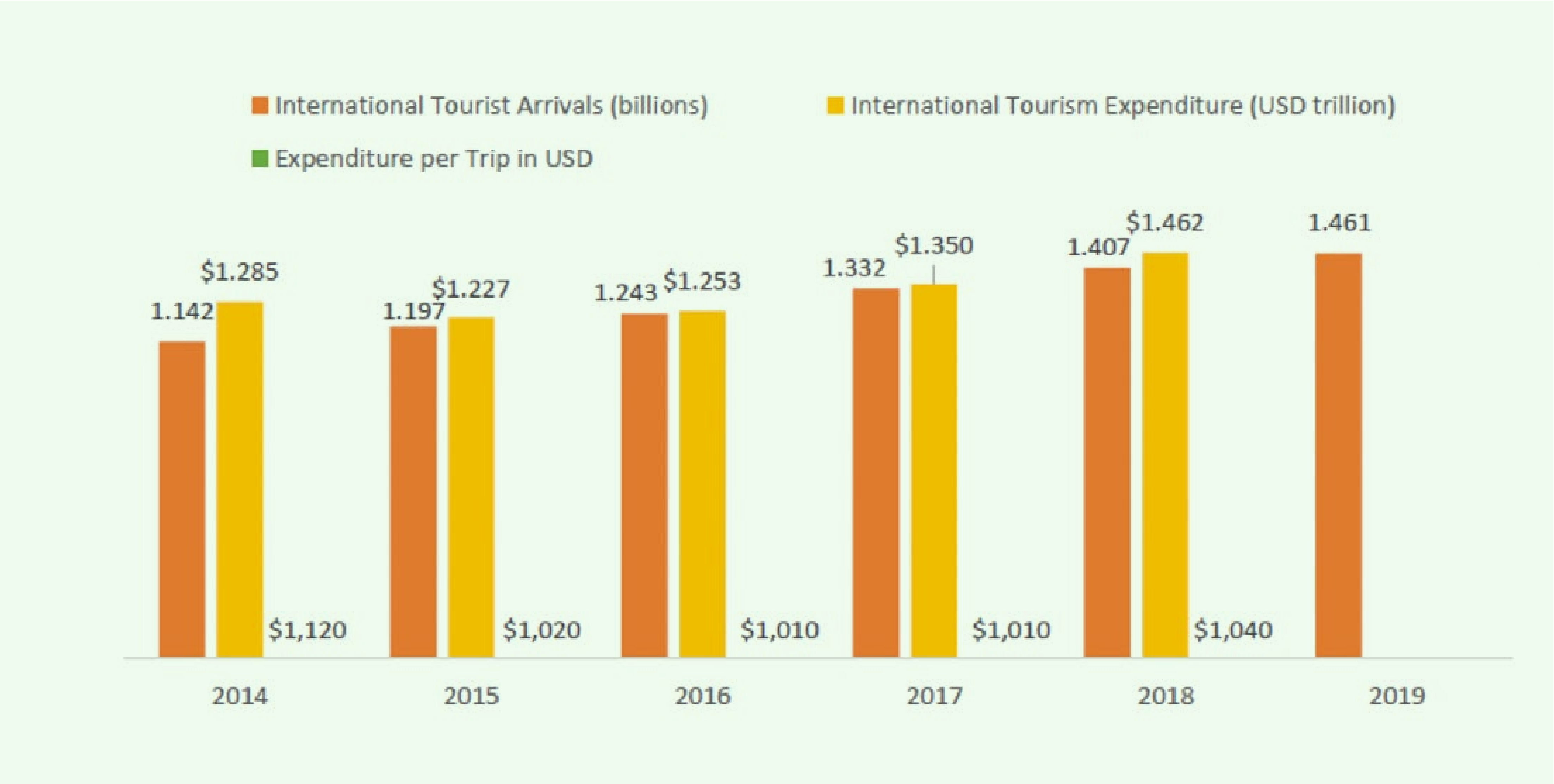
Throughout the years, tourism has become one of the fastest growing economic sectors in the world. As of 2019, it was the world's third largest export category, surpassed only by chemicals and fuels, and it often showed a strong capacity to compensate for weaker export revenues in many oil and commodity exporting countries (UNWTO, 2019a). Several factors have allowed the industry to grow in a rapid manner, including the expansion of the middle class, increasingly affordable travel costs, more accessible visa facilitation, new business models, continuing technological advances, and more (UNWTO, 2019b). Additionally, prior to the COVID-19 pandemic, the long-term forecast for the tourism sector was expected to reach 1.8 billion international arrivals worldwide by 2030 with an increase of 3.3% a year between 2010 and 2030. These numbers were previously calculated considering that tourism was shown overall as an uninterrupted sector with only occasional shocks (UNWTO, 2017).

In order to have a better understanding of the tourism industry after the COVID-19 pandemic, it is essential to analyze the past global tendencies and trends. This section has taken into consideration the years 2014 to 2018, as full reports and updated data were available from the World Tourism Organization up to the year 2018.

»»» *Statistics of tourism trends from 2014/2018*

A comparison of behaviour throughout the years was made, starting with the correlation between international tourist arrivals and the international tourism expenditure and expenditure per trip, followed by the analysis of the motivation for travel and the most used methods of transportation in the same period. Figure 1 shows the numbers of international arrivals, expenditure through tourism and the expenditure per trip.

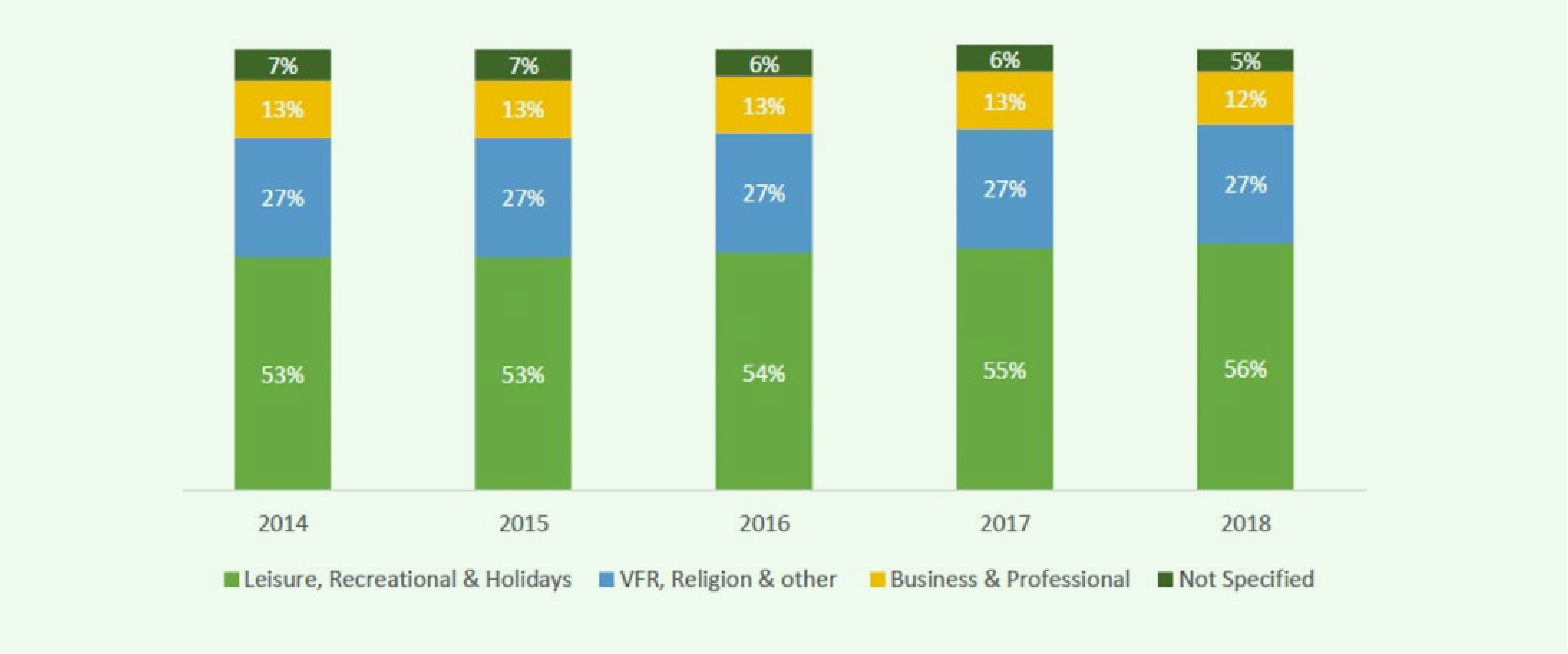
Figure 1 - International Tourism Statistics from 2014- 2019



Drafted by authors from UNWTO 2020

As can be seen with figure 1, international arrivals have had a consecutive growth throughout the years, with an average of increase of 5.2% per year. Though a decrease was seen in international tourism expenditure in 2015 and 2016, it bounced back in 2017 and 2018, resulting in an overall growth of 4.4% over this period. Finally, the overall average expenditure per trip totalled to $1,040 USD. Additionally, the arrival shares by region had an average of 50.8% for Europe, followed by Asia and the Pacific with 24.4%,

Figure 2 - Purpose of Visit (Global)



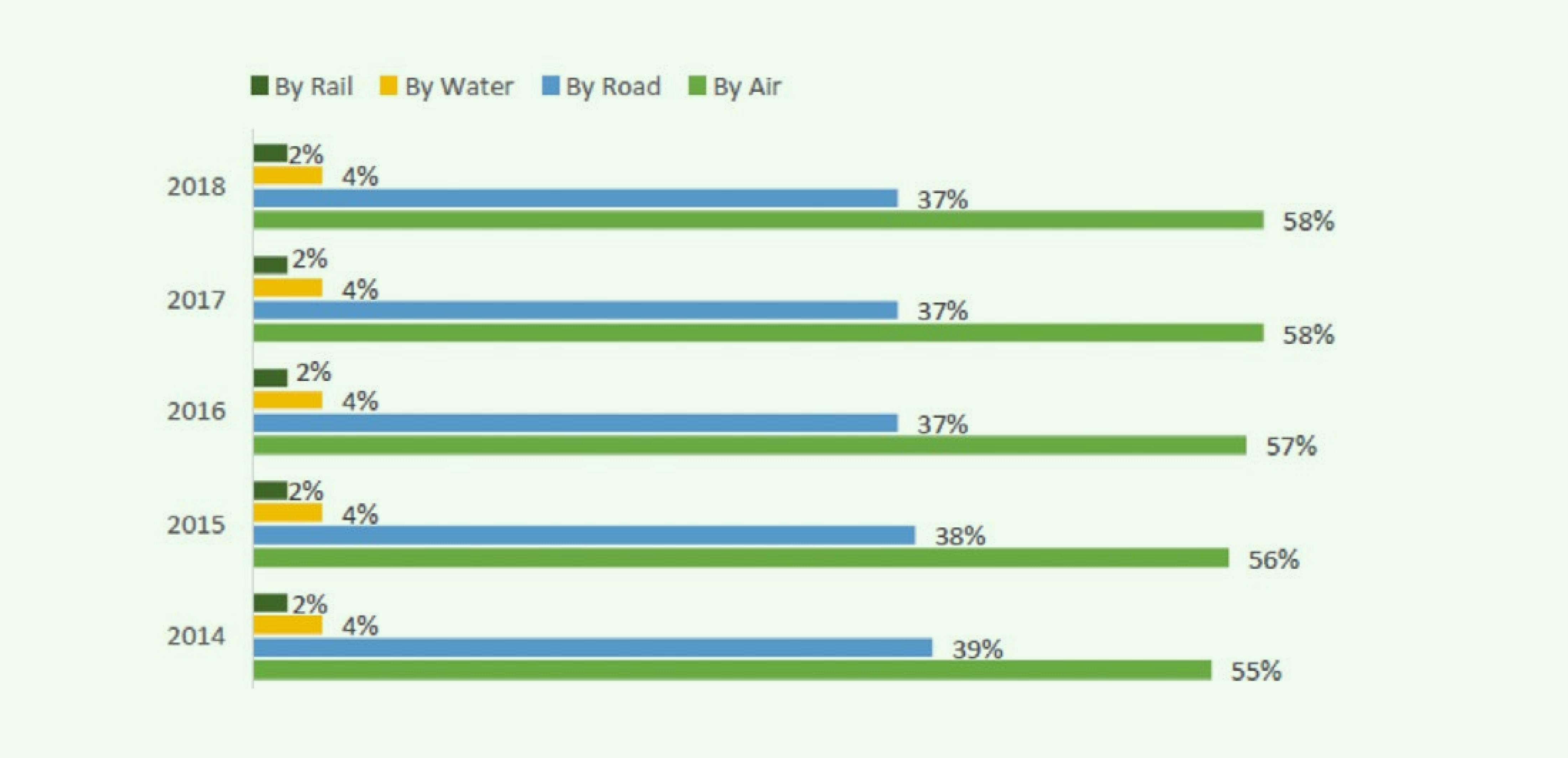
Drafted by authors from UNWTO 2020

the Americas with 15.8%, Africa with 4.8% and the Middle East with 4.4%. However, in terms of the highest amount spent per arrival by region, the Americas lead the board, followed by Asia and the Pacific, the Middle East, Europe and Africa (UNWTO, 2020).

Figure 2 shows that, without a doubt, the main reason for traveling is for leisure, recreation or general holidays with an overall average of 54% across the years. This is followed by the people that travel to visit friends and relatives (VFR), due religious reasons or other, with an average of 27%. The third overall purpose for traveling was for business and professional reasons with an average of 13%, and, finally a 6% of participants did not specify their motive for travel. Regionally, between the years of 2014 and 2018, Europe had the highest leisure and recreational travelers with an average of 58% and the Middle East received most of its visitors due religion, VFR or other with an average of 45.6%. Africa led the business and professional travel category with an average of 15.4%, and, finally, the most non-specified travelers were in the Americas with an average of 19.8% (UNWTO, 2020).

According to the UNWTO, the most used method for travel has been by air with an average of 57%, followed by transportation by road with an average of 38%. Travel by water and rail were the least used modes of transport with an average of 4% for the former and 2% for the latter. It's important to mention that, historically, the region with the most aerial transportation was the Middle East, with an average of 69%, and Africa led in transportation by road and water with an average of 44.8% and 6.25% respectively. Lastly, Europe was the region where the most travel was done by rail with an average of 2.96% between 2014 and 2018 (UNWTO, 2020).

Figure 3 - Modes of Transport Used for Travel Globally



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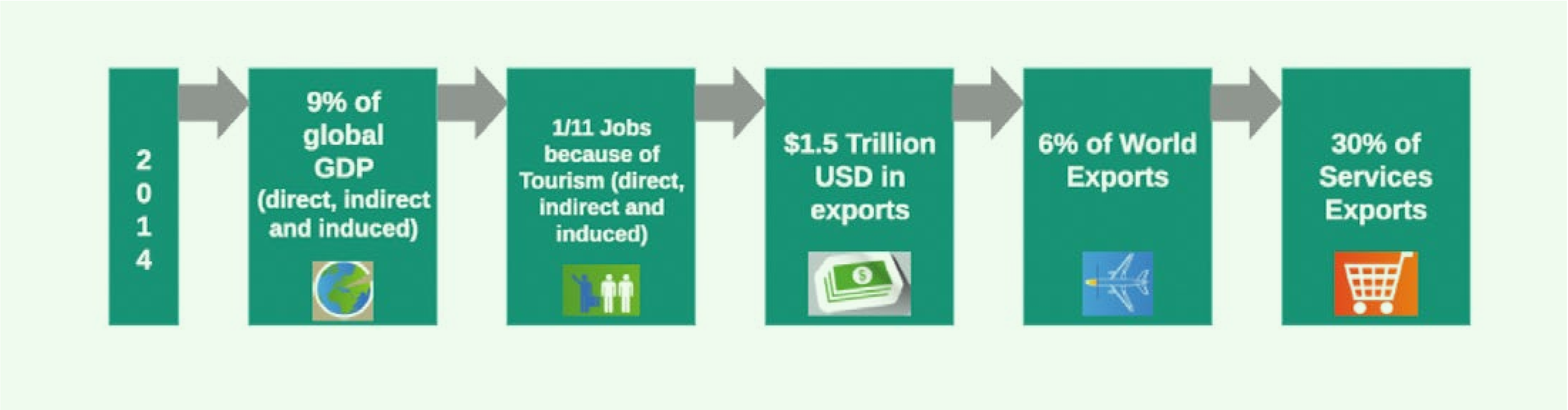
»»» *Trends in 2014*

According to the 2015 report provided by the UNWTO, the highlights of 2014 showed that the Americas had the strongest growth in international arrivals (8%) across all world regions and Mexico climbed places to re- enter in the Top 10 arrivals in the 10th position. Countries like France, the United States and China led the rankings for international arrivals and receipts, while the majority of destinations that showed the weakest growth were located in Africa. Furthermore, China was highly relevant for the tourism sector as the top and fastest growing market source for the industry, increasing the expenditure abroad by 27% and generating 13% of the global tourism receipts (overall, China, the United States and Germany were the top spenders of the World for 2014). Finally, the majority of the international travels took place within the traveler's own region, with four out of five arrivals originating from the same region (UNWTO, 2015).

Figure 4 - Global Economic Indicators in Tourism in 2014



Drafted by authors from UNWTO 2015

»»» *Trends in 2015*

In 2015, tourism flows were affected more so than in previous years, primarily by three factors: unusually sharp fluctuations in exchange rates (dollar appreciation and the weight of the pound in the market), the drop in the price of oil and other products and, lastly, the growing concern about security on a global scale due to geopolitical conflicts manifesting in multiple destinations. As a result of these fluctuations, the tourism receipts were positively influenced in some regions (revenues increased in the Americas by 8%, Asia and the Pacific and the Middle East by 4%, Europe by 3% and Africa by 2%). As far as international arrivals go, the Americas and Asia and the Pacific registered an increase of 6%, and the Middle East saw an increase of 2% (fueled by intraregional demand by the members of the GCC[1]); simultaneously, international arrivals fell by 3% in the African region, mainly due to the poor performance of North Africa (namely, public health and security problems, and slower economy based

1. Gulf Cooperation Council - is a political and economic alliance of six countries in the Arabian Peninsula: Bahrain, Kuwait, Oman, Qatar, Saudi Arabia and the United Arab Emirates.

Figure 5 - Global Economic Indicators in Tourism in 2015

Drafted by authors from UNWTO 2016 & World Travel & Tourism Council (WTTC)

Figure 6 - Global Economic Indicators in Tourism in 2016

Drafted by authors from UNWTO 2016 & World Travel & Tourism Council (WTTC)

around lower oil, gas and raw material prices). Furthermore, China, the USA and the UK led outbound tourism in their respective regions due to the strength of their currencies and economies (UNWTO, 2016).

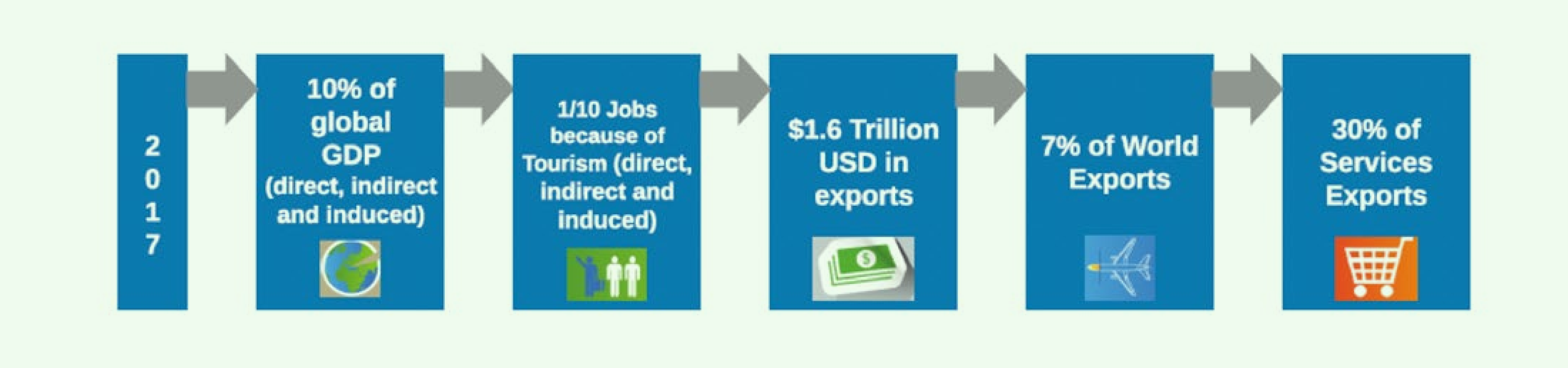
»»» *Trends in 2016*

The previous years' trend of increasing demand for international tourism continued; multiple destinations reported a solid rise in visitor numbers and receipts, while others did not due to security incidents (either within the country or region). Several tourism flows were redirected, however, most destinations participated in the overall growth in relation to the stronger travel demand via increased connectivity, more affordable air transport and, for many countries, simpler visa procedures. Asia and the Pacific led the growth in international arrivals (+9%) (due a growing purchasing power in emerging economies, relaxation of visa requirement, etc.); followed by Africa (+8%) (with a strong rebound on previous years due the wake of various geopolitical, economic and health challenges); the Americas (+3%) (representing 16% of the world total, with South America leading the growth for the region) and Europe (+2%) (with mixed results across destinations - while some showed exceptional results, others reported weaker due security concerns). The Middle East suffered a decline in arrivals of 4% (the mixed results within the region were not enough to create a positive growth, as the increase for more solid destinations was unable to balance with the offset decrease of others). Finally, China remained the leader in outbound travel and several destinations outside the Top 10 showed a double digit growth in expenditure (India, Argentina, Qatar, Thailand, Spain, Israel, Ireland and Egypt to name a few) (UNWTO, 2017).

»»» *Trends in 2017*

In 2017, destinations that had suffered from security challenges in recent years began to show recovery (this was seen strongly with Brazil, India and the Russian Federation). International arrivals surpassed the UNWTO's 3.8% forecast per year for the period of 2010-2030, with a 7% increase. This growth was fueled by a global economic upswing led by a strong demand from multiple market sources, both traditional and emerging. The Middle East led the growth in receipts after a weak 2016 with a 13% increase in income due to international tourism and above average growth was seen in both Africa (with a 9% increase in arrivals and 8% in receipts due the recovery in the north) and Europe (with an 8% increase led by Southern Mediterranean arrivals). Furthermore, Asia and the Pacific continued their growth (+6% in international arrivals) based on a solid intraregional demand (from China, the Republic of Korea and Australia) and Japan entered the top 10 in receipts. The changes in this ranking resulted in China moving down from 5th to 12th place in terms of receipts. Finally, the Americas displayed positive results across most destinations with a 5% increase in receipts overall (UNWTO, 2018).

Figure 7 - Global Economic Indicators in Tourism in 2017



Drafted by authors from UNWTO 2018

»»» *Trends in 2018*

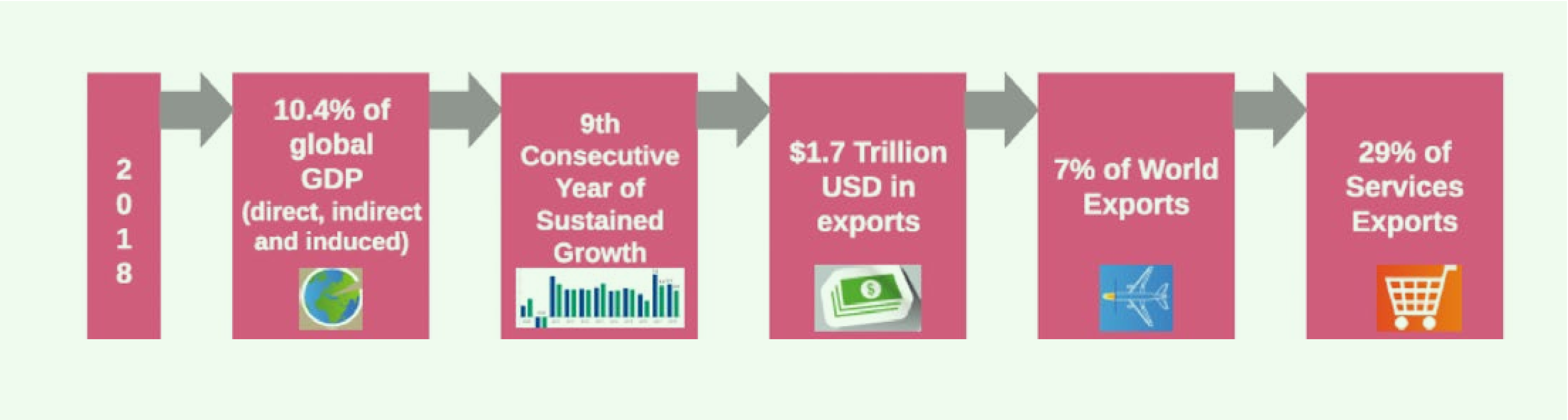
2018 was the 9th consecutive year of sustained growth - this year due to three main factors: the strong demand for air travel (as a result of stable fuel prices and lower fares), digital technologies shaping the travelers experience (such as artificial intelligence transforming tourism and enabling a hyper-personalized customer experience, while improving businesses performance) and enhanced visa facilitation (as there was a rise e-visas and visas on arrival and a decrease in traditional visas). Moreover, there were great displays of societal changes, with consumer travel trends that promoted sustainability, competitiveness through the efficient use of resources, promotion of biodiversity conservation and actions against climate change (UNWTO, 2019b).

Examples of these shifts in thought include:

* **“Travel ´to change´** - Live like a local, quest for authenticity and transformation”.
* **“Travel ´to show´**- ´Instagrammable´ moments, experiences and destinations”.
* **“Pursuit of a healthy life** – Walking, wellness and sports tourism”.
* **“Rise** of the ´access´ economy”.
* **“Solo travel & multigenerational travel** – as a result of aging population and single households”.
* **“Rising awareness on sustainability** - zero plastic and climate change”.

(UNWTO, 2019b, pg. 5)

Figure 8.- Global Economic Indicators in Tourism in 2018



Drafted by authors from UNWTO 2019 & World Travel & Tourism Council (WTTC) 2019

»»» *Trends in 2019*

The information concerning this year is based on the Travel & Tourism Economic Impact 2019 World report by the World Travel & Tourism Council, taking into consideration that the last complete report provided by the UNWTO was of the year 2018. The most relevant data of this year started with the jobs generation through the industry, with 1 out of 10 being either directly or indirectly from the tourism sector and 1 out of 5 newly created jobs over the last five years being related to tourism. Additionally, 28.8% of global travel and tourism GDP came from international tourism receipts, while the remaining 71.2% originated with domestic spending. Regarding the tourism industry's direct contribution to the global GDP, it was forecasted to rise by 3.6% from the previous year and was expected to grow by the same percentage (3.6%) per year until 2029 (WORLD TRAVEL & TOURISM COUNCIL, 2019). Finally, in the period of January- September 2019 the international arrivals grew by 4% globally (in comparison of the same period of the previous year). During 2019, several factors influenced the growth of the international tourism, such as: a slowdown of the global economy; raising geopolitical challenges; prolonged uncertainty about Brexit; and lower business confidence - including the collapse of the major travel group "Thomas Cook" and some small European airlines, which temporarily affected some key tourism destinations, especially in the Americas and Europe (UNWTO, 2019a).

»»» *Conclusion*

The tourism industry has been non-stop and expanding for several years and has historically been associated with the development of many economies and societies. Even a few months ago, the sector would have commonly been described as rapidly growing and highly beneficial to invest in. However, the COVID-19 pandemic has abruptly halted this pattern of growth and created a completely different economic environment, changing the course of the industry. Travel restrictions have been enacted around the world, social distancing has become the new norm, and tourism is currently seen as a reckless and dangerous activity. Nevertheless, it is important to remember that interest and accessibility to travel was previously on the rise, and the sector was promising and highly relevant. Although the tourism industry may not be able to fulfil its original 2030 projections, it is still highly likely that it will return to prominence once again, especially if practitioners and businesses create or follow new models that are based on post-pandemic patterns and changes of thought.

02

The effects of previous disasters and crises on tourism

Gabriela Vera Cardenas & Carolyn Manning

Travel is one of the most popular activities worldwide and countries that have developed a tourism industry often find it to be a lucrative source of wealth. However, negative events such as economic and social crises, terrorist attacks, and natural disasters have the ability to affect tourism operations from running smoothly and, ultimately, contributing to a country's economy. By its very nature, the tourism sector is more vulnerable than most other industries to a broader range of crises. Due to tourism being fundamentally based on the expectations and trust of visitors, even small disturbances can damage the image of a destination and cause a negative perception for travelers (Rodriguez- Toubes, 2009).

In the short term, the consequences for tourist destinations can be economic losses due to the decrease of visitor arrivals, cancellation of reservations or loss of trust. Nevertheless, it has been shown before that the tourism sector has a great capacity for recovery and, in the long term, the effects of these disasters can be reduced (Rodriguez- Toubes, 2009).

Two aspects can characterize a crisis in a tourist destination: one being a situation in which the destination suffers a sudden and significant reduction in tourist arrivals and spending, and the other is the expansion or exportation of the crisis to other areas due to mismanagement (Sharpley, 2005).

The following characteristics are by definition a crisis in tourism:

›Threat to normal operations and tourism related business management

› Damage inflicted on the destination mainly in safety, tourist attraction and comfort by the tourist's negative perception of the destination

› Decrease in sales of the local travel and tourism sector and interruption in the development of the operations of travel and tourism companies due to the reduction in the arrival and departure of tourists".

Sönmez (1999) identifies these characteristics in his definition of a crisis in tourism:

The decrease in arrivals is directly related to visitors' perception of threats to their health and personal safety, and the image of the destination greatly influences the decision-making process of potential tourists. Travel and vacation plans are often adapted by potential travelers in response to perceived threats (Sönmez, 1999).

According to Faulkner (2001), the difference between these two; is that a crisis is the result of wrong actions or lack of adequate actions by any actor or organization, reaching a negative situation for a person or community, whereas the disaster refers to situations where an institution has had to face unexpected and catastrophic changes, where the human being has minimal control, such as natural disasters (for example floods, earthquakes, or tornadoes).

Although tourism is a globally resilient sector with continuous growth, it is also highly vulnerable to external events which temporarily or permanently interrupt, divert or decrease tourist flows (Sharpley, 2005). The tourism industry is highly susceptible to external factors and pressures in the environments in which it operates, which, in turn, has a broader effect on economies as a whole due to the industry's influence on and intermingling with many other sectors (Goeldner, 2000).

According to Nankervis (2002), vulnerability can be perceived in the tourism sector on three levels: on a wide scale covering the entire sector (macro ambit), on an individual or organizational scale (micro ambit), and due to the frequent problems that arise from the contacts and relationships (interface). Other elements to consider when it comes to tourism vulnerability are the wave or expansion effect and the lack of uniformity of the impact on the destination. For example, in many cases, a crisis suffered in a country has an expansive effect on the neighbouring destinations, and thus multiple tourism markets could be impacted (Beirman, 2003). Simultaneously, a natural disaster could hit a destination and only impact certain locations within it, rather than its entirety. In terms of risk factors that can affect tourism activity, there are three that have been determined to leave the industry and sector most vulnerable: terrorist attacks, infectious diseases, and natural disasters (Law, 2006).

»»» *Terrorist attacks: the example of 9/11*

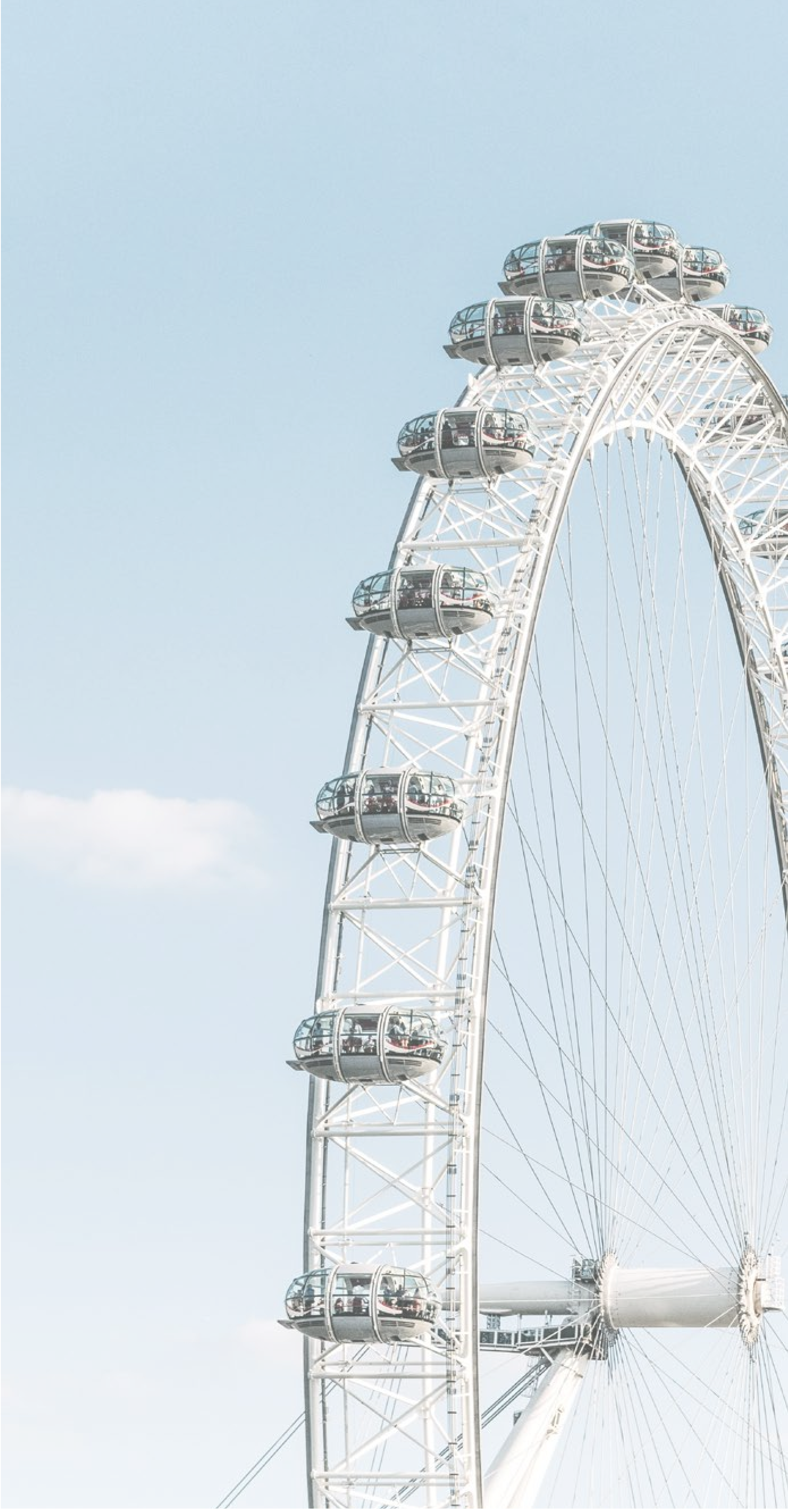
After the terrorist attacks in New York City on September 11th, 2001 and London on July 7th, 2005, international leisure services did not return to normal with usual speed, mainly because the acts themselves were done using transportation (airplanes for the former and the public underground trains for the latter).

"9/11" was a terrorist attack that occurred on September 11, 2001, when 4 passenger planes were used to target and destroy influential buildings in the United States including the World Trade Center and the Pentagon. 2,972 lives were taken (Goodrich, 2001) and the incident not only shook the East Coast of the USA, but the entire world.

Months following the attack, the tourism industry saw a 10% downturn in revenue worldwide and a loss of over 6 million jobs; with the Americas and the Middle East being hit the hardest (Belau, 2003). This also resulted in a redirection of tourism flow into place like the Mediterranean. At the time of the attacks, the airlines were a rising industry, but between September 2001 and December 2001 flights fell by 20%, creating a financial crisis. Following 9/11 the unemployment rate in the United States fell by 5% amongst all industries and the estimated GDP lost from tourism in the U.S. was $27.27 billion (Blake and Sinclair, 2002). Hotels and flights saw the biggest loss. The effects of 9/11 spanned past the United States, especially as U.S. tourists either stopped traveling altogether or started traveling more domestically, taking a hit on international destinations. For example, the Caribbean post 9-11 saw a 13.5% decline in U.S. visitors, which eventually led to temporary loss of nearly 365,000 jobs in the area (Korstanje & Clayton,2012).

As a response to the evident economic crisis in the United States, Congress enacted the Air Transportation Safety and System Stabilization Act (ATSSSA) which was ultimately a $15 billion bailout plan for the airline industry, with $3 billion of that going to further security and safety (Blake & Sinclair, 2002). News sources reported that a percentage of the allocated money also went to unexpected companies that weren't necessarily passenger carrier planes, such as package delivery companies and Grand Canyon helicopter rides (Holguin, 2002). Another measure taken to help save the tourism industry was the implementation of the Six Point Plan, which was created by the Tourism Industry Recovery Coalition (TIRC). The TIRC was made up of industry members that formed a lobbyist group to fight for more action from the government to help the tourism industry. The six points included providing tax credit on domestic travel, modernizing loan programs for small businesses, allowing for workforce tax credit for employees in travel, extending taxes allowances, getting tax deductions, and organizing funding for marketing campaigns (Bysyuk, 2012). The actions taken by lobbyists and Congress helped many companies stay afloat, especially airlines, and the tourism industry in the United States bounced back by 2004 (Werling & Horst, 2009).

In the time following 9/11, travel patterns changed as more people opted for car and domestic travel. An example of a tourism



entity that knew how to take advantage of the changing domestic and regional tourism patterns during this time was the Tourist Office of Canada. They accurately estimated that Americans would be reluctant to travel long distances in a plane to places in Canada, so focused their attention on North American cities located within a 10-hour radius by car. All the scheduled announcements for the U.S. market were immediately removed and replaced by a new campaign with the slogan "A short drive down the road, a million miles away" (Pike, 2004).

»»» *Epidemics: the example of SARS*

Another range of crises that impact tourist destinations are epidemics of infectious diseases. This can be seen with the impact of SARS (Severe Acute Respiratory Syndrome), which started affecting different Asian countries in early 2003 and gradually spread to other parts of the globe via infected international travelers. Chien and Law (2003) confirmed the vulnerability of tourism during this outbreak, and made note that the economy was impacted more negatively in territories in which tourism was a basic sector (like Hong Kong), rather than in other regions that were already positioned in the industries of production and manufacturing (such as Singapore and Mainland China).

The first case of SARS was found in March of 2003 and the World Health Organization did not consider the outbreak finished until August of that same year, reporting a total of 8,437 cases worldwide. The SARS outbreak caused an immediate reduction in the number of passengers on international flights - in fact, between June 2002 and June 2003, numbers dropped by 80%. The epidemic also affected hotel occupancy numbers; as can be seen in May of 2003, when rates dropped between 10% and 90% across the countries and areas that were the most impacted (primarily China, Hong Kong, Singapore and Vietnam) (Pine and McKercher, 2004).

Though initially a medical problem, the consequences of SARS affected the tourism sector in a major way and changed the behaviour of travelers around the globe; as could be seen when tourism worldwide dropped by 1.2% in 2003, visitor spending and capital investment decreased from 5% to 2.9% and Asia experienced a 9% drop for the year. According to the World Travel and Tourism Council (2003), the outbreak of the SARS disease led to the collapse of the tourism industry in the most severely affected Asian countries. Additionally, SARS was estimated to have cost these four countries over USD $20 billion in loss of the Gross Domestic Product, with a GDP reduction of more than 70%

across the rest of Asia, including countries which were 100% disease free (Mckercher and Chon, 2004). As can be seen with many crises, media outlets primarily produced sensationalized content associated with the epidemic, which ultimately portrayed the handling of the situation to be far worse than it was in actuality; creating an opportunity for the public to be misinformed. In hindsight, the government bodies of the majority of the affected areas did not have experience managing the communication of this kind of outbreak, which resulted in the primarily negative media attention; this ended up playing a major role in the drop of tourism. McKercher and Chon (2004) explained that "the reason for the collapse of tourism in this region (China, Hong Kong, Singapore and Vietnam) must be attributed to how governments reacted to perceived threats from the disaster more than the real danger to public health".

As the COVID-19 pandemic aligns more closely with the SARS epidemic than other crises and disasters mentioned herein, a more thorough analysis was done on the research conducted by Mao, Ding and Lee in 2009 titled **"Post- SARS Tourist Arrival Recovery Patterns: An Analysis Based on a Theory of Disasters"**. Their methodology utilized the catastrophe theory[2] , which explains why a drastic change occurs to an element, while the rest of the factors surrounding it stay stable. It also considers how quickly it returns to the initial dynamics or if it produces a hysteresis[3] , prolonging the return to "normality". In this study, the catastrophe theory was used to analyze post-SARS recovery patterns of inbound arrivals to Taiwan from travelers coming from Japan, Hong Kong, and the USA.

Taiwan's tourism industry suffered from the outbreak of SARS. Arrival numbers subsequently fell in the second quarter of 2003 by 71.54% due to the epidemic. It is important to mention that a historic decrease in arrival numbers was recorded in May of the same year. Furthermore, inbound arrivals in Taiwan began to recover after the WHO removed the country from its list of SARS-affected areas. The government and private sector worked on various tourism promotion programs featuring new destinations to attract foreign visitors to Taiwan under the Post-SARS Recovery Plan. As a result of these efforts, the number of arrivals to Taiwan rose at a steady rate of 8% per month in 2004 and by the end of the year had recovered to 90% of the amount seen concurrently in 2002 (Taiwan Tourism Bureau (TTB), 2004).

Visitors from **Hong Kong** (including **Macao**) have historically been the second largest population of arrivals in Taiwan. From 2001 to February 2003

(pre-SARS), the number of Hong Kong tourists in Taiwan averaged around 20,000 per month. Moreover, Hong Kong (like Taiwan), was hit badly by SARS from mid-March through the summer of 2003. In order to decelerate the spread of SARS, the Taiwanese government imposed special travel restrictions for Hong Kong and Macao. These regulations included the cancellation of visa-free entry into Taiwan for citizens of Hong Kong and the requirement for all passengers and crew arriving in Taiwan from Hong Kong to spend 10 days in quarantine in their own homes or hotel rooms. By mid-April, the number of flights between Hong Kong and Taiwan had decreased by 45%; resulting in a reduction of the number of tourist arrivals from Hong Kong of 61.6% (from 22,345 in March to 8,582 in April). Furthermore, in May, the number of flights declined to 63% and the number of tourist arrivals from Hong Kong dropped to merely 105 (the lowest ever recorded). In late June and early July 2003, Hong Kong and Taiwan were officially removed from the list of SARS-affected areas. Taiwan immediately launched aggressive campaigns to revive its tourism sector, including special promotional packages offered to citizens of Hong Kong. As a result, the number of tourist arrivals from Hong Kong jumped to 13,470 in july and

to 21,288 in August. By the fourth quarter of 2003, the number of tourist arrivals from Hong Kong had recovered to 90% of the level achieved in the same period of 2001.

Historically, **Japan** has been the largest source of tourist arrivals for Taiwan. However, Japanese tourists tend to have a high preference for safe and passive activities (Pizam &Jeong,1996; Pizam, Verbeke, & Steel, 1997). Therefore, the willingness of Japanese tourists to visit Taiwan decreased due to the SARS outbreak. According to the statistics of the Taiwan Tourism Bureau, before the outbreak of SARS, the number of Japanese tourist arrivals averaged around 50,000 per month, however during the SARS period, the number of Japanese arrivals declined from 60,786 in March 2003 to 1227 in June.

Lastly, the United States was the third largest source of tourist arrivals in Taiwan. From 2001 to February 2003, the number of U.S. arrivals averaged around 5000 per month. After the outbreak of SARS, the number of arrivals decreased from 4090 in March 2003 to 480 visitors in May. Nonetheless, after the alert was withdrawn, the U.S. arrivals jumped back to 4541 in August, a number close to the pre-SARS level.

Overall, tourist arrivals from Hong Kong recovered in a relatively short period of time of 3-4 months (stressing that Hong Kong was more affected by SARS than Taiwan). This likely was due to travelers feeling psychologically indifferent when it came to health security, feeling similarly to being in Hong Kong or travelling to Taiwan. On the other hand, Japan, which was not as severely affected by the epidemic itself, displayed a significant hysteresis phenomenon, as its tourists seemed to be more cautious and heterogeneous. Nevertheless, the arrival volume was gradually restored, though it took a year for figures to recover to pre-crisis levels. Although the United States and Japan were affected by the SARS epidemic in different ways, the fall in tourist numbers during the outbreak was similar. However, the USA did not experience the same level of hysteresis and the numbers rose back up immediately after the alert was withdrawn. According to the authors, it is possible that this phenomenon occurred because American travelers trusted the judgment of the World Health Organization, and once this entity removed Taiwan from the list of SARS-affected areas, they felt comfortable travelling.

Ultimately, it can be concluded that there are different recovery patterns primarily depending on two factors: the origin of the tourists (which can be the basis for their psychological and cultural views on safety and travel) and the overall impact that a disease has on their individual countries.

2. "Catastrophe theory was developed in the early 1970s to provide a theoretical framework for studying discontinuous phenomena in otherwise continuous systems (Thom, 1975; Woodcock & Davis, 1978; Zeeman, 1976, 1977). Catastrophe phenomena are ''a class of dynamic processes that exhibit a sudden and large scale change in at least one variable in correspondence with relatively small changes in other variables'' (Brown,1995, p. 1) (e.g., water suddenly boils, ice melts, earthquake, and stock market crash).

3. "The hysteresis phenomenon represents the effect of system memory or the inertia of the system. Thus for a changed system to recover its original state, it must be ''over- corrected'' with extra efforts. The existence of hysteresis effect also calls for the need to exercise a deliberate ''unfreezing'' (to break the ice of system inertia) endeavor before any drastic change of the state of a system can bring about." ("Post-SARS Tourist Arrival Recovery Patterns: An Analysis Based on a Theory of Disasters"), Article pg. 1 Date (September 17th, 2009).

»»» *Natural disasters: the examples of hurricane Katrina and the 2004 tsunamis*

In 1994, Barton emphasized that effective crisis management, post-crisis communication and marketing are essential to recovery after the crisis. Therefore, it is important to know what marketing and communication tools are going to be the most beneficial for a full recovery in the long term.

In their 1989 article “Tourism and Disaster Planning”, Murphy and Bayley explained the steps necessary for a successful long-term recovery process for natural disasters and identified four main phases present in disaster plans:

› **Evaluation:** potential risks were identified and assessed.

› **Notice:** the warning period must be relatively long, allowing enough time to spread information effectively for the creation of emergency plans. Safety notices, which are common and standard for ship and plane trips, may not be as common in the case of tourist destinations, in order to avoid alarmed visitors.

› **Impact:** This stage is characterized by the disaster-produced threat of life and property damage caused, and by the subsequent public and private implementation of emergency services and rescue operations. During this stage problems with media coverage and curious visitors can arise.

› **Recovery:** this is the most important phase; tourism can start the recovery period by spreading international information and by inviting tourists to the affected areas. Such visitors will witness the restoration of security to the afflicted area, having the attractions of the zone potentially providing new income to aid recovery. Furthermore, the recovery phase is divided into four successive periods (emergency, restoration, reconstruction and commemoration).

Hurricane Katrina hit the coast of the United States of America on August 29th, 2005. Primarily hitting the states of Louisiana, Mississippi and Alabama, it resulted in serious flooding, material damage and loss of life. The catastrophe had a severe impact on tourism in the area, which was a main economic activity of many parts of the region, especially the city of New Orleans. According to the New Orleans Tourism Marketing Corporation, tourism produced close to $5.5 billion USD annually, representing 40% of local government income. In the previous year of 2004, the record of visitors had reached over 10.1 million people (New Orleans Conventions and Visitor Bureau, 2009).

The impact of Hurricane Katrina could clearly be seen in 2005, with that number going down to only 3.7 million visitors within the year. However, in subsequent years starting in 2008, these numbers have rapidly increased, with figures ascending from 7.6 million in 2008 to 51.3 million in 2018. In 2014, 10 years after the disaster, New Orleans finally saw it’s numbers bounce back to those pre-Katrina with 9.5 million (Castro- Rodriguez, 2009).

After the natural disaster in the city of New Orleans, Hurricane Katrina itself ultimately became a new tourist attraction. New Orleans visitors who once toured mansions in the garden district or learned the history of the plantations of the Mississippi River, now had a new motivation to visit the areas most affected by the hurricane and flocked to guided tours that made the disaster the main attraction (Castro- Rodriguez, 2009).

On January 4th, 2006, The Gray Line company started its newest tourist attraction: “Katrina: America’s Worst Catastrophe”, in which they showed the ruins of the city. Normally, Gray Line organized trips through the historical districts of the city, as well as its swamps and cemeteries; but the company was severely affected by the hurricane and decided to create the “Katrina tour” due to the frustration of the government authorities’ slow response in reconstructing the city. 10% of the ticket sales for the three-hour ride were donated to those affected by the hurricane. Indeed, the commemoration period of Hurricane Katrina was a key factor in boosting tourism again (Castro- Rodriguez, 2009).

Another example of a natural disaster affecting tourism occurred on December 26th, 2004, when an underwater earthquake originated West of Sumatra and caused a series of tsunamis that hit the coasts of most of the countries bordering the Indian Ocean. This event caused a high number of deaths and the devastation of a large number of coastal communities. This, in turn, impacted the tourism industry in Thailand, as tourism contributed almost 6% of the Gross Domestic Product in 2002, making it an important portion of the Thai economy (Birkland, 2006).

The destruction of infrastructure during the tsunami was severe; hundreds of hotels in Thailand were partially or totally damaged. However, many of those hotels had been rebuilt and were operating normally approximately one year later. Despite the reconstruction of the establishments, the Hotel occupancy in June of 2005 was 40%, while only a year earlier it had reached 70%. After the tsunami, new tourist products appeared which were directly built around the exploitation of the disaster. For instance, the travel agency “World Class On Tour”, offered a three day package that consisted of traveling to devastated areas (Hoontrakul, 2005). A study by Rittichainuwat (2006) on the recovery of Thai tourism after the tsunami in 2004, showed that low price tourist packages were not effective in the long term as promotional tools. Overall it seems the aspect that convinced tourists to travel to the destination after the impact was the information (and verification) provided by the governmental and local authorities that displayed that the appropriate measures had been taken in order to maintain the safety and security measures in the area.

»»» *Conclusion*

Tourism has been considered one of the largest industries worldwide due to its contribution to the global GDP (for example - 10.3% in 2019, equating to $8.9 trillion USD) and the social, environmental and economic impacts it has had within destinations. However, given its interrelation with other industries and sectors, tourism is also influenced by the environment around it. Additionally, a crisis or disaster in one destination can have negative effects on other destinations, whether they are directly involved or just located nearby. The COVID-19 pandemic is not the first instance in which the industry has been affected by outside events such as natural disasters, socio-political crises, terrorism attacks or health emergency outbreaks. In terms of the latter, the industry has faced challenges previously with SARS in 2003, H1N1 in 2009, Ebola in 2014, MERS in 2015 and ZIKA in 2016; experiencing declines in tourist arrivals, losses in revenue, less expenditure and job loss in the specific geographical regions that were affected. Though the scale at which the COVID-19 pandemic has affected the world may be unheard of in modern history, there are lessons that can be taken from previous crises and disasters and used to more easily transition the tourism industry to a state of “normality” as the outbreak concludes.

Although defined as a vulnerable industry, tourism is equally as resilient. As was shown above with the examples of the 9/11 terrorist attacks, SARS outbreak, Hurricane Katrina, and the 2004 tsunamis; crises and disasters will impact locations differently and the measures in which tourism destinations are rebuilt should reflect as such. In all situations: the issues were exacerbated by the media overall influencing the image of each place, especially in a negative manner; government action and funds were required to rebuild destinations and assist in bailouts of suffering industries, such as the airlines; and tourism products were built from the story of these disasters, resulting in a form of “dark tourism” in each area. A major take-away can be seen in the case of the 2004 tsunamis, where information put out on safety and security measures were much more effective in bringing in new visitors than promotions. It is vital that not only are destinations rebuilt or restructured, but that the media properly conveys the concern that should be taken for each location, rather than exacerbating fear or inaccurate data. In all dire situations explored, innovation in product, security and safety were important factors in revitalizing a destinations’ tourism industry; and, in the case of the COVID-19 pandemic, this will need to be done on a global scale.

03

The start and effects of the COVID-19 pandemic

Daniela Apparente
& Juan Henao Bradford

This chapter aim to explore how the COVID-19 pandemic started, reaching the rest of the world from China, in the city of Wuhan. The global pandemic impacted many countries in different ways, bringing consequences from an environmental, economic and social point of view. The current chapter analyzes these effects worldwide.

»»» *China*

When did it all begin and how? What is now referred to as Coronavirus Disease 2019 (COVID-19) manifested with a strain of Coronavirus called SARS-CoV-2 at the end of the year 2019. Initially, it was believed that the first individual showing symptoms was identified on December 1st, 2019 in the city of Wuhan in the Hubei prefecture of Central China. However, it is now known that the disease has an incubation period ranging between 1 and 14 days, so it is very likely that COVID-19 actually started during the previous month of November with a 55-year-old man that is believed to have shown symptoms as early as November 17th. (Cohen, 2020) (Ma, 2020) The first 15 patients (including the men from November 17th and December 1st) had no link to the Huanan Seafood Wholesale Market or any epidemiological links with other cases. The remaining 66% of the cluster – whose symptoms showed up later in time - confirmed a link with the Huanan Seafood Wholesale Market (武汉华南海鲜批发市场). This market was well known in the Jianghan District for selling live animals, as well as products made from animal parts; and was shut down on January 1st, 2020 in response to an epidemiological alert released by the local health authority the day before (December 31st, 2019). On this same day, Chinese authorities informed The World Health Organization (WHO) about what was happening in Wuhan, describing the new "form of pneumonia" that was affecting part of the Chinese population (Secon & Woodward & Mosher, 2020).

On December 30th, one day before alerts and information were made public, Doctor Li Wenliang - an ophthalmologist working in the area of Wuhan - warned some of his colleagues and friends about the outbreak of a virus he had witnessed in seven patients that had been quarantined that was causing severe acute respiratory syndrome (SARS). This information was spread on the WeChat social media platform. A few days later, he was accused by the Public Security Bureau in Wuhan of making false statements that disturbed the public order. There, he had to sign an official document declaring he would stop illegal activities - otherwise, he understood he would face legal consequences. After the summons, Li Wenliang kept working on the frontlines during the worsening of the infection, inside the Wuhan Central Hospital - one of the health facilities most affected by what was considered at that time to be purely an epidemic.

On February 7th, 2020 Doctor Li Wenliang died at the age of 33, after being infected with SARS-CoV-2. A few days before his death, in an interview with The New York Times, he declared: "If the officials had disclosed information about the epidemic earlier I think it would have been a lot better (...) There should be more openness and transparency" (Green, 2020).

»»» *The rest of the world*

The WHO issued its first official report about COVID-19 on January 21st, 2020, referring to the period of December 31st, 2019 to January 20th, 2020 (WHO, 2020). At that point, there were only 282 confirmed cases, of which 278 were in China, 2 were in Thailand, 1 was in Japan and 1 was in the Republic of Korea. These included 6 deaths in Wuhan, China. At the same time this report was published, in China, there were 51 people in serious condition and 12 people at risk of fatality. On January 30th, the WHO officially announced the emerging coronavirus outbreak to be a global health emergency. (WHO 30, 01, 2020) .

China initiated strict measures to contain the spread of the virus, and other countries started acting in the days and months to follow. The measures taken included massive quarantines, restrictions of movement and strict controls, which were progressively taken throughout each country in differing formats. This was first seen in Japan, South Korea, Singapore and Italy; the last of which was seen as a symbolic country in the European fight against this new epidemic. After Italy declared itself a “red zone” in March of 2020, containment measures started being applied in Spain, France, Portugal, Germany, the United Kingdom and various other European countries, as the infection was spreading differently from place to place.

In Latin America, Peru was the first country to act. On March 15th, in order to stop the spread of the virus throughout the territory, the borders were completely closed and mandatory social isolation started. The day after, Ecuador announced 60 days of Health Emergency inside the country. In Argentina, social, preventive and mandatory isolation was decreed starting from March 20th to March 31st for all people present in the country. On March 22nd, Chile and Colombia took isolation measures and closed the borders. Within the same month, Mexico and Brazil were the only ones not taking any measure to fight the spread of COVID-19, as citizens opted for voluntary isolation, pushed by the authorities to stay home as long as possible. Meanwhile, in North America, It wasn’t until March 19th that the U.S. State Department issued a global Travel Advisory Level 4 - “Do Not Travel”, which had an impact not only on citizens and residents of the USA, but also on many countries that had yet to start travel restrictions (Kelleher, S. 03,19,2020).

In a report published by the WHO on March 30th, they confirmed 693,224 cases worldwide, with 33,106 deaths (WHO, 2020). Specifically in the Americas, 142,081 cases were confirmed with 2,457 deaths, the United States having 86% of these with 2,112 deaths. In Europe, 392,757 cases with 23,962 deaths were confirmed, where Italy contained 25% (with 10,781 deaths) and Spain 20% (with 6,528 deaths).

The world is now facing a new panorama, suspended in a state of static and constant evolution, where the future of industries and the current model of the economy is being fractured. The fear that this virus will collapse healthcare systems all around the world, from the most precarious to the most advanced, led to something unheard-of: for the first time, governments are defending public health, not only above the economy, but at its expense. One of the most affected areas is tourism: here, mobility and social interactions are fundamental - as they have been for the spreading of the virus. Due to these two factors, the virus moved more quickly through and hit very hard a sector who closed 2019 with big numbers - as the last report published in 2019 by the World Tourism Organization showed tourism as a healthy sector, with of 10% of the world’s GDP, generating up to $1.7 billion USD and moving 1.461 billion tourists (of which Europe received 716 millions, Americas 220 millions, Asia and the Pacific 340 millions and the Middle East 59 millions) (UNWTO, 2020)

04

The effects of the pandemic

Daniela Apparente
& Juan Henao Bradford

»»» *Environmental*

According to what the United Nations World Tourism Organization published at the end of the last year, the emissions related to global tourism represented 22% of worldwide transport emissions in 2016 and was anticipated to continue doing so through 2030 (UNWTO, 2019). As the COVID-19 pandemic was completely unexpected, this outlook has changed; indeed, based on what has happened for the past few months, it appears global carbon emissions from fossil fuels could drop by 5% this year (Rauber, 2020). In fact, news has spread all over the world concerning air pollution improvements. According to the Wisconsin Department of Natural Resources, offices and other business environments in general tend to produce more garbage than individuals do while working from home during this quarantine period, which is having a positive effect in terms of a smaller amount of waste (Groh, 2020); and the Centre for Research on Energy and Clean Air (also known as CREA) confirmed that global nitrogen dioxide emissions reduced by 25% in just one month. The same is happening in countries where lockdowns are lasting longer; for example in Italy - where the improvement of the condition of the air is especially evident in the North, which happens to be the most industrial part of the country as well as the area that was hit the hardest by the virus (NASA, 2020). India is witnessing the first spring ever with the lowest average level of nitrogen dioxide pollution, and the same is happening in the USA – especially in Yosemite National Park, usually crowded with people and now a kingdom of coyotes, bobcats and bears; just think that 4.6 million tourists visited the valley in 2019 and only approximately 308,000 were there in April (Rust, 2020).

While emissions from fossil fuel combustion have dropped radically in many countries, on the other hand, this is just a temporary positive effect of the pandemic on the environment.

However, this pandemic is causing a worsening of two other situations: garbage accumulation and the slowdown of plastic-free attempts.

Garbage accumulation.

Just think of the huge increase in the amount of hospital waste. Masks and other protective equipment used by healthcare professionals can only be worn once, as disposable tools. Wuhan hospitals produced over 200 tons of waste per day during the peak of the outbreak there, compared to an average of less than 50 tons in an earlier period. Moreover, due to the quarantine status, many cities and town have had to stop the environmentalist measures in place before the pandemic broke out: for example, in the United States, smaller municipalities have suspended recycling programs because of the risks associated with the spread of the virus; and in Italy, infected residents have been asked not to sort waste. Furthermore, the collection of garbage by the public service no longer occurs at the same speed as the pre-pandemic period in some areas, causing the accumulation of different types of waste for several days, exposed to the uncertainties of the climate. On top of this, with the start of smart working procedures and mass lay-offs (due to the consequent economic crisis), the quantity of consumers isolated in their houses has increased rapidly. This has led to a significant rise in online shopping and home food orders, which has increased the use and production of "disposable" materials.

Plastic-free attempts "on pause". In addition to what was mentioned in point A, the temporary slowdown and stop of environmental measures can also be seen with some companies. Regardless of geographic location, many brands have returned to producing and using disposable plastic objects and utensils, while many restaurants will no longer accept reusable containers - for example, Starbucks has temporarily banned the use of reusable cups and glasses (Voice of Youth & UNICEF, 2020).

The "positive" side of this current global crisis is that Earth is taking its space back again. This can be seen with sika deer wandering the streets of Nara, Japan; endangered turtles that are now able to populate once more on beaches in Brazil; gangs of wild turkeys that are infiltrating of the Bay Area of California; wild goats that have taken over a town in Wales; and wild boars roaming past cars and through gardens in the Israeli city of Haifa. (Thailand article and Emboldened article) On the other side, some environmental measures have been stopped in order to contain the spread of the virus. When this pandemic ends, mass isolation won't be the solution to climate change – it would be by rethinking the way humans are used to living. Keeping what good has been gained from this situation, plus holding onto positive trends from before the pandemic would be a preferable compromise – and a second chance.

»»» *Economic*

The COVID-19 pandemic has come at a time when economic systems have been in decline for more than a decade. According to the Economic Commission for Latin America and the Caribbean (ECLAC), the economic performance of the world economy was already weak before the COVID-19 pandemic: in fact, between 2011 and 2019, the average world GDP growth rate was 2.8%, a lower figure than the 3.4% rate that occurred between 1997 and 2006. In 2019 alone, the world economy registered its worst performance since 2009, with a growth of only 2.5%. Even before the pandemic, global GDP growth forecasts for 2020 had been revised downward (ECLAC 2020).

As the pandemic has spread in 2020, the forecasts have spoken of a decrease in world GDP for this year of 2.3% (OECD 2020). The New York, London and Tokyo stock exchanges, along with other major global markets, all saw declines following the outbreak on December 31st. The Dow Jones and Financial Times Stock Exchange indicators have experienced their biggest one-day declines since 1987.

Another important aspect that has caused the stock markets to fall is the fall in the prices of commodities, such as gold, oil (which has decreased by more than 50%), and most metals and minerals (which have decreased by 20% or more during the month of March, 2020). Countries that base their economies on these goods may experience a major recession in the coming months; it should be noted that the vast majority of these countries are in Africa and Latin America, home to a quarter of the world population (UN 2020).

According to the International Labour Organization (ILO), the COVID-19 pandemic is expected to wipe out 6.7% of working hours globally in the second quarter of 2020 – equivalent to 195 million full-time workers. Also, according to this organization, the economic and labour crisis caused by the pandemic could increase global unemployment by almost 25 million people, which is 3 million more than was seen in the global financial crisis of 2008-2009. The ILO also estimates that between 8.8 and 35 million more people will be in working poverty worldwide, compared to the original estimate for 2020 - which predicted a decrease of 14 million globally; in fact, it is considered highly likely that the numbers predicted in the first half of 2020 will rise by the end of the year (ILO, 2020).

»»» *Social*

The COVID-19 pandemic is currently showing many differences that exist in society, since it can be more damaging for certain social groups in vulnerable situations - including people living in poverty, the elderly, people with disabilities, youth, those living in abusive home environments and indigenous peoples. These groups may suffer more strongly from the impacts of the pandemic; for example, homeless people may be unable to take refuge safely, leaving them highly exposed to the dange r of the virus as well as more susceptible to others intending to commit crimes against them. People without access to running water, refugees, migrants or displaced people also suffer disproportionately both from the pandemic and its consequences, whether due to limited movement, fewer job opportunities, increased xenophobia, or more.

Two categories that are worth dwelling on briefly are women and migrant workers.

Women

Women have been recognized as 70% of the global health workforce fighting against the spread of COVID-19, exposing them to a greater risk of infection.

Nevertheless, they continue to face many kinds of disrespect and abuse in the workplace, as well as at home (WHO, 2019). In fact, the risk of increase in forms of abuse in times of domestic restrictions is at the center of several appeals around the world. One of these was launched globally by un secretary-general antonio guterres, who spoke of a relevant increase in cases of domestic violence - with double or triple requests for help in certain countries (donnini, 2020). In short, the COVID-19 pandemic seemingly exacerbates the feminization of poverty, vulnerability to violence and women’s equal participation in the labour force (Sadeque, 2020).

Migrant Workers

Migrant Workers fall under another demographic that is suffering the crisis generated from the COVID-19 pandemic. Migrants account for almost 30% of workers in some of the most affected sectors in oecd countries, especially when it comes to seasonal jobs. Due to varying measures taken by governments (in order to mitigate risks), a large number of migrant workers are stuck in foreign countries with no economic support - either from their state of origin or from the country in which they find themselves in isolation (this is even more exacerbated for undocumented migrants who often are not registered with government authorities).

According to the International Labour Organization, even before the outbreak of COVID-19, one in five countries, home to billions of people living in poverty, would likely see per capita income stagnate or decline in 2020 (ILO, 2020). Now, it is likely that billions more are affected as governments struggle to cope with the situation. This will increase the number of people in vulnerable situations.

In addition to the above, according to the last report from the United Nations, it is anticipated that as the COVID-19 pandemic worsens, deep-seated economic anxiety — fuelled by slower growth and higher inequality — will increase (UN April, 2020). Even in many high-income countries, a significant proportion of the population does not have sufficient financial wealth to live beyond the national poverty line for three months. For example, this can be seen in countries such as Italy and Spain, where, up until this point, it is estimated that 27% and 40% of the population, respectively, do not have enough savings to afford not to work for more than three months.

It is commonly seen that financial crises weigh heavily on individuals psychologically, and the economic impact of the COVID-19 pandemic can be hard-hitting globally in this way. On top of this, and less emphasized between countries, there are psychosocial consequences occurring on a mass scale directly related to mandatory social distancing protocols. In March, the Inter-Agency Standing Committee (an inter-agency forum formed by the United Nations and non-UN humanitarian partners, founded in 1992) published a few relevant guidelines for mental health and psychosocial support. These guidelines addressed not only the world population, but focused as well on local and government institutions around the world.
It is understandable that during an epidemic or a pandemic, people often feel stressed and worried. The most common fears are related to death, resulting in many individuals avoiding healthcare facilities in times of need purely out of concern of contracting the virus; more commonly seen is the everyday fear of being infected outside of the home, which results in social isolation and possible avoidance of people who have been identified positively with COVID-19, even after recovery. Moreover, as the global economic crisis has led many companies to fire a large number of workers, the fear of losing means of subsistence through job loss and not being able to provide for self or family during solitary confinement can heavily affect a person.

For this, different levels of intervention are suggested for local governments and institutions to act on - such as:

› **Specialized** services for people with mental disorders.

› **Emotional** and behavioral support from social workers.

› **Further creation** of online and offline local networks, in order to support people on an everyday basis (especially families with children).

› **Securing basic services** and respecting the dignity of individuals (IASC, 2020).

It seems that everywhere - on TV shows, in articles, through online streaming platforms - people are being recommended behaviors that aim to fight the sense of isolation and social abandonment. Promotion of keeping up a healthy lifestyle; regular video and phone calls with friends and family; and stopping tobacco, alcohol or drug use are only a few of the suggested topics. Overall, the encouragement and action of these healthy activities may be helping some people relax or find solace in the short term, but, depending on the length of lockdowns per country, other measures may need to be taken by individual governments and institutions in order to protect the psychosocial

state of residents in the long-term.

Conclusion

The global COVID-19 pandemic is continuously changing aspects of everyday life around the world. This can be seen in media (both large and small-scale), where issues that have previously received less coverage are receiving headlines - such as environmental issues outside of global warming, domestic abuse, the hardships of both documented and undocumented migrant workers and so on. In many ways, we have reached a point where today's decisions will shape tomorrow's world sooner than was previously expected. Ultimately, this pandemic will likely lead to devastation for both countries and individuals, but there may be an opportunity to bring something positive out of this time of global change. Hopefully, the emergencies and crises that are becoming more visible during this time will be acknowledged by politicians and constituents over the years to come, and measures may be taken to prevent similar difficulties from happening during future disasters.

How the pandemic has affected tourism in Colombia, Ecuador, Italy, Spain and the United States of America

»»» Introduction

Juan Henao Bradford

The tourism sector has made great strides in providing employment and other opportunities for women, youth and members of rural communities. According to the World Travel and Tourism Council (WTTC), prior to the COVID-19 pandemic, 330 million jobs were related to the tourism sector (meaning 1 in 10 employees around the world); which reinforces the tourism industry's role as a driver of economic growth and job creation (WTTC 2019).

According to the UNWTO, international tourist numbers fell by 22% within the first quarter of 2020, and it is likely that these statistics could become 60-80% by the end of this year. Taking past market trends into account, this would mean that five to seven years of growth will be lost due to the COVID-19 pandemic. (UNWTO 2020). According to the Economic Commission for Latin America and the Caribbean (ECLAC), this lower demand for tourism services would affect the Caribbean countries the most intensely. Original predictions said that If the travel ban caused by the virus lasts for one, two or three months, Caribbean tourism activity would decrease in 2020 by 8%, 17% or 25%, respectively. As of the time of publication, it has been over two months since travel restrictions were enforced across the Caribbean, however, official tourism industry numbers are yet to be released. Ultimately, according to the World Economic Forum, up to 70% of the GDP across the Caribbean Islands is generated from tourism and "S&P Global Ratings expects that tourism in the Caribbean will probably decline by 60-70% from April to December compared with last year", thus it is highly likely that the Caribbean will indeed be hit hard economically regardless of the overall length of travel restrictions (Barbara Bernard, May 7th, 2020). In fact, as of mid-May, 100% of countries (comprising 217 destinations) have imposed travel restrictions, with 72% of them shutting down their borders internationally (156 in total); within these numbers, 25% have had a form of these in place for over 3 months and 40% have had them for more than 2 months. Putting this in context, the UNWTO pointed out that following the global economic crisis in 2009, international tourist arrivals decreased by 4%, while the SARS outbreak caused a decrease of just 0.4% in 2003 - meaning that these travel restrictions will impact the tourism industry more heavily than has been seen in any other modern crisis (UNWTO 2020).

One important and lucrative tourism sector that is being hit hard due to wide-spread cancellations is that of Meetings, Incentives, Conferences/Conventions and Exhibitions (MICE). According to a survey led by Burson Cohn & Wolfe (BCW-global, 2020), (a leading global communications agency) that focused on an international selection of 100 major cities that host events, 78% answered that they expect to suffer financial losses in 2020 due to the cancellation or postponement of events in their city or region. In terms of impact on overall hosting strategy, there seems to be a possible shift focusing more on national events; indeed, 37% of the cities said that it is likely that they will host less international events in the future.

All of this could lead to a corresponding reduction in jobs of between 31% and 33%. The World Travel & Tourism Council (WTTC, April, 2020) says that up to 100.8 million jobs in the Travel and Tourism sector are at risk due to this pandemic.

Many governments are working to try to mitigate the most devastating effects of the pandemic; which are not only those of health, but the economic and social as well. The measures they have used have been vastly different between different countries and regions. In this section, we are presenting a summary of some of the impacts on tourism and steps taken by governments in the countries of Colombia, Ecuador, Italy, Spain and the United States; first through April 14th then updated through June 5th, 2020.

01

Colombia

Juan Henao Bradford

Figure 9.- Map of Colombia

Source: www.lonelyplanet.com, maps' section (Colombia)

Colombia is a country in which tourism has become an engine of the economy. In 2018, President Iván Duque announced that "tourism is the new oil in Colombia" and ensured its strategic nature as a generator of employment, investment and opportunities. In fact, according to data from the United Nations World Tourism Organization (UNWTO), international tourist numbers in Colombia have had an average growth of 5% over the past 10 years. This has opened up new possibilities of investment and support to the communities in the different regions. In fact, in 2019, Colombia received 3.9 million tourists, representing $6.6 billion USD in receipts (UNWTO, 2020) and around 2.1% of the GDP. This figure exceeds the combined income of exports of flowers, coffee and bananas.

In addition to the country's growth in tourism and its economic importance, two other important facts should be noted: first, the nomination of Colombia as the main destination to visit in 2020 according to the United States Tour Operators Association (USTOA 2019) and, second, its position as the best leading destination in South America for 2020 according to The World Travel Awards (considered to be the most important award in the tourism sector).

Regarding the productive structure of the sector, according to the Colombian Tourist Information Center (under the Ministry of Commerce, Industry and Tourism - MinCit) (MinCit, 2020), in 2018 there were 30,008 registered tourism service providers in the country. These included: travel agencies and accommodation, among others; and did not count air transport companies. Of these, 95% were small companies (0-20 employees), 4% medium-sized companies (21-100 employees) and only 1% were large companies (more than 100 employees). Additionally, there were fifteen hundred registered tourist guides.

MinCit (2020) additionally reported that 183,861 people were directly/formally employed in the tourism industry in 2018; it is estimated that only 46.1% of people were directly/formally working in tourism, while another 53.9% were indirectly/informally doing so. To this it should be added that the air transport sector employed 71,000 people in the country pre-pandemic, according to the International Air Transport Association (IATA 2020). It is important to note that these concrete numbers only show the jobs directly linked to the tourism sector and do not count the indirect jobs to which contribute to the sector, which are many more.

In 2019, according to the MinCit, 4.5 million Colombians traveled abroad; out of these, 3.5 million were classified as outbound travellers (having left directly from Colombia). In terms of domestic tourism, according to the National Administrative Department of Statistics (DANE, 2020), in 2019, 12.4% of the national population participated in internal tourism, and each person spent an average of $18.40 USD per day. Regarding the transportation they used, most of them traveled by land via private car (45.1%), while 38.4% used public land transportation. The remaining 13.4% traveled by plane.

The first measures against the pandemic in Colombia

On March 6th, 2020, the National Government confirmed the first case of COVID-19 in Colombia. This was found after a traveler arrived from Italy to the country. The measures taken by the Colombian national government began more rigorously starting on March 17th, 2020; two months after the WHO issued its first official report on January 21st, 2020. At this time, the Government declared a State of Emergency. From that date, the following measures were taken:

The Ministry of Foreign Affairs decreed that travelers would not be allowed to enter Colombia, with the exception of Colombian nationals, foreigners who are classified as residents in the country (visa holders in the Migrant or Resident categories) and members of the diplomatic corps.

On March 22nd, it was decided that from March 23rd until May 30th, no national would be allowed to enter Colombia.

Social isolation (quarantine) was declared beginning from Tuesday, March 24th until Monday, April 13th; a date that was later extended until May 30th, 2020, stating that children and young people would be required to stay at home until this date (Presidencia, 2020). No universities, colleges, or gardens were allowed to be open, so as to not become vectors of propagation. Adults over 70 and people with pre-existing conditions which made them vulnerable to the virus were also required to stay at home until the end of May.

Public events, discos, bars, gyms and restaurants were required to close for 18 months.

Only essential businesses were allowed to stay open, including the pharmaceutical laboratories, food industry and its supply chain, call centers, etc. (in total 46 activities/sectors were excluded) (Min. Interior, 6,05,2020).

The construction, manufacturing, bicycle maintenance, public parking, and gambling sectors were able to return to work starting April 27th, 2020.

Also, on April 27th, civilians could do outdoor activity within a radius of 1 kilometer from their place of residence.

On the 14th of April, The Ministry of Health launched "CoronApp", a cell phone application that allows Colombians to follow what was happening with the COVID-19 pandemic across the country. Once the app was downloaded and kept on an individual's cell phone, they would receive 1GB of internet data for free during the quarantine.

»»» *Action lines supporting tourism*

As of April 14th, the measures taken against the crisis by the government have been:

> The suspension of the collection of the tourism tax contribution for all sales generated in the next 6 months.

> Postponement of the presentation and/or payment of income and complementary taxes for businesses.

> The declaration of VAT and income taxes for the aviation and tourism sectors can now be carried out at the end of the second semester (done in an effort to provide cash relief for companies) (ANATO 2020).

> The launch of the 'Colombia responde' credit - a direct response to the losses that the tourism and aviation sector are facing due to the COVID-19 pandemic. In total, the government has set aside $250 billion COP (approximately $64,372,375 USD) for relief, which will be used for loans. These have a maximum amount per company -$3 billion COP (approximately $772,468 USD) for SMEs (small and medium companies) and $5 billion COP (approximately $1,287,447 USD) for large companies - which can be paid back within a max time of 3 years (MinCit 2020).

Lastly, another important action has been taken by the government agency in charge of promoting exports and international tourism in the country - ProColombia. Their 2020 campaign deals with the situation and aims to generate a link with travelers by carrying the slogan "Let's take care now so we can meet later", seeking to reduce the consequences possibly seen in the future.

Colombia. Updates as of June 5th, 2020

> The quarantine was extended until june 30th, 2020 (presidencia 2,05,2020). Only economic activities excluded by decree could reopen.

> From june 1st - 30th, there would be no national passenger flights, nor ground transportation, and everything would be conditioned to the evolution of the pandemic. The national government had not given a definitive date for the reopening of national flights, but the mayors would have the faculty to make requests to reopen before the ministry of the interior (in essence, having this done in a regionalized way).

> On the 6th of may, colombia declared the state of economic emergency for the second time since march. In this stage, the country would close its frontiers until the 31st of august.

> International flights were not allowed until the 1st of september.

Regarding the tourism sector:

> On may 2nd, the national government announced that it would provide a subsidy of $ 585,000 cop (approximately $150 usd at the time) for tourist guides for three months. They had to submit a request to the national tourism fund and meet some requirements (presidencia 2, 05, 2020).

> Procolombia launched training through the program “ruta exportadora en turismo”, to provide tools to entrepreneurs in the sector.

> In order to send a message of confidence and security to travelers when tourism in the country is reactivated, the ministry of commerce, industry and tourism, with the support of procolombia and icontec (the colombian institute of technical standards and certification), created the biosecurity seal “check-in certificate, COVID-19 biosecure”, a certification that aims to guarantee minimum risk of contagion of the virus and which is endorsed by the world tourism organization (UNWTO).

02

Ecuador

Johanna Coral Flor &
Gabriela Vera Cardenas

Figure 10.- Map of Ecuador

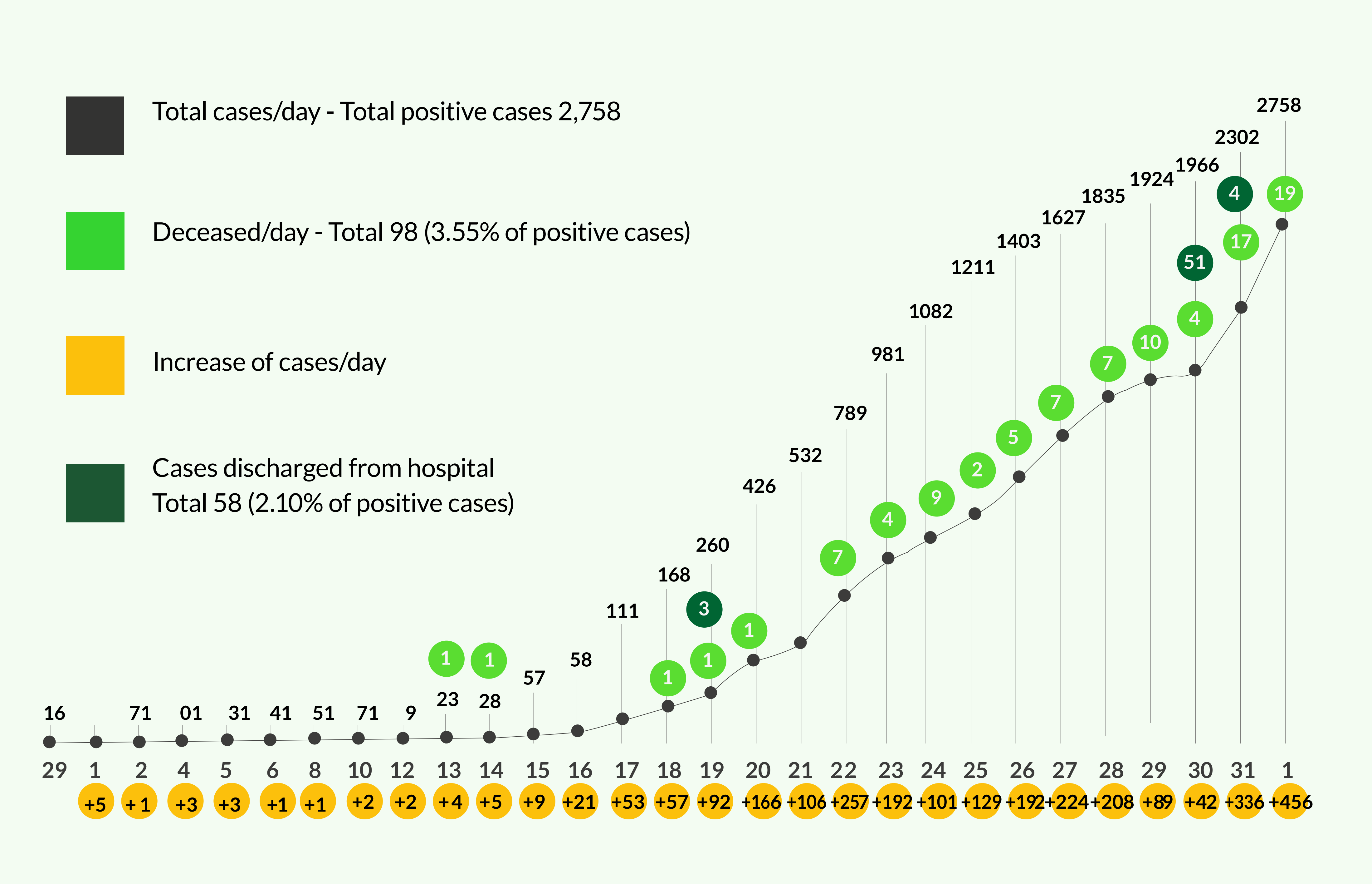
Source: www.lonelyplanet.com, maps' section (Ecuador)

Tourism is currently the third largest source of non-oil income in Ecuador (after banana and shrimp exports). The numbers generated by the sector have inspired the Ecuadorian government to set the goal of making tourism the first source of foreign income in the long-term (Ministerio de Turismo, 2019).

Prior to the COVID-19 pandemic, the tourism industry in Ecuador continuously generated an important source of income for the national economy – in the latest report from the Ministry of Tourism, presented in 2018, it accounted for a total contribution of $2,392.10 million USD, which represented 5.8% of the Gross Domestic Product that year (the direct contribution equated to $2,300 million USD, a total of 2.3% of the GDP). Indeed, previously in Ecuador, for every $100 USD produced, $5 USD was generated through the tourism sector (Ministerio de Turismo, 2019). Additionally, by 2019, 24,720 touristic establishments were registered in the country and an average of 500,000 employees that worked in jobs associated with accommodation and food and beverage (representing 6.5% of total employees in the national economy). These statistics show how relevant tourism was and can continue to be in the Ecuadorian economy (GEO VIT, Geo portal. Innovación turística 4.0, 2020).

The COVID-19 pandemic that was initially reported to the WHO from Wuhan, China on December 31st 2019, has rapidly reached various countries and continents worldwide (World Health Organization, 2019). Ecuador's patient zero was first detected on February 29th - a 71-year-old woman that came from Spain for a holiday. The woman was asymptomatic and held a family reunion, where the virus began to spread at a very fast pace (AFP, 2020) (Metro Ecuador, 2020). The figure below shows the cases of COVID-19 that tested positive between February 29th and April 1st, which went from 1 to 2,758 positive cases. Moreover, in only two weeks, according to the official data presented by the National Risk and Emergency Management System of Ecuador, the number of infected people grew in a rapid manner, ultimately reaching 7,603 confirmed positive cases and 369 deaths (Sistema Nacional de Gestión de Riesgos y Emergencias, 2020).

Figure 11.- Timeline of COVID-19 Cases in Ecuador from February 29th to April 1st, 2020



Drafted by authors from Servicio Nacional de Gestión de Riesgos y Emergencias, 2020 and WHO, 2020

As of April 14th, over 70% of the cases in Ecuador have taken place in the province of Guayas, where the virus first arrived (Sistema Nacional de Gestión de Riesgos y Emergencias, 2020). As the virus continued to grow, the country occupied third place for the highest number of positive COVID-19 cases in South America until April 15th (proceeded by Brazil and Chile) (World Health Organization, 2020). Additionally, several reports, including the testimony from President Lenin Moreno, acknowledged that the real number of deaths was not shown on the official records (as several people were dying in their homes and not being included in statistics). In April, it was estimated that 2,500 to 3,500 people would die in the province of Guayas within only a few weeks[4].

4. As mentioned in various national and international channels:

'Local newspapers make reference to the national televised network by the president Lenin Moreno stating that the official reports fall short" Los registros oficiales se quedan cortos", Metro, 02/April/2020.

'International portal with the title: Coronavirus in Ecuador "The numbers fall short": Lenín Moreno admits that the crisis of the COVID-19 is more serious than reported, BBC News Mundo, 02/2020.

“El presidente de ecuador, Lenin Moreno, en un mensaje a los ecuatorianos menciono que los registros oficiales se quedan cortos a la realidad y ha ordenado que se transparenten los datos de los casos de coronavirus en Ecuador. Además, se estima que habrá de 2500 a 3500 fallecidos solo en Guayas: The President of Ecuador, Lenín Moreno, in a message to ecuadorians mentioned that the official records fall short of reality and has ordered that the data of the coronavirus cases in Ecuador be transparent. In addition, it is estimated that there will be 2,500 to 3,500 deaths in Guayas alone.”- Los registros oficiales se quedan cortos” (President Lenin Moreno stating that the official reports fall short), metro (metro Ecuador), date (April 2, 2020).

“La crisis de sanidad que atraviesa Ecuador por el número de muertos de los últimos días, tanto victimas de COVID-19 como por otras causas, es más profunda de lo que los informes del gobierno mostraban. Las autoridades dicen haber recolectado los cadáveres de unas 300 personas fallecidas en domicilios que, por falta de sitio en morgues repletas, no habían podido ser levantados por efectivos de criminalística de la policía nacional: the health crisis in Ecuador is deeper than what government reports showed, due to the number of deaths in recent days, both victims of COVID-19 and other causes. Authorities say they have collected the corpses of some 300 people who died in homes, as a result of lack of space in crowded morgues, additionally, the bodies could not be lifted by members of the national police criminalistics.”- coronavirus en Ecuador | "los números se quedan cortos": Lenín Moreno admite que la crisis del COVID-19 es más grave de lo informado (Coronavirus in Ecuador “The numbers fall short": Lenín Moreno admits that the crisis of the COVID-19 is more serious than reported), BBC News (aka BBC New mundo), date (April 3, 2020).

»»» *The effects of the COVID-19 pandemic on Ecuador's tourism industry*

On March 16th, Ecuador declared and enforced a national State of Exception. By the 17th, a new curfew had been imposed in order to prevent the spread of the disease which mandated that residents could only take their cars out to get groceries once a week between 5am and 2pm (with threat of a fine if not followed and retention of the vehicle if circulating on a non-authorized day or if a repeat offender). Additionally, residents were not allowed to leave their homes after 2pm from Monday through Sunday; penalties for not obeying the established curfew were a $100 fine for the first offense, $467 for the second offense and jail time for up to 3 years for the third offense. All citizens were required to wear a mask at all times outside of their homes in order to prevent the spread of the virus (for people not complying with the mandate a fine was implemented and, in some towns, community service was made necessary. Social distancing was also required at all times in any public space, as per the State of Exception. On April 9th an "epidemiological traffic light system" was announced where the colors red, yellow and green determined how the restrictions in each province were applied (red: the rules set at a national level still applied, restriction of mobility, curfew, suspension of classes and on-site work; yellow: allowed up to 50% of staff to return to work, operation of commercial premises at a 30% capacity, reduction of curfew and urban transport authorized up to a 30% occupancy; green: allowed work activity to resume up to 70%, further reduction of curfew, business operations permitted up to 50% capacity and transport services with a maximum of 50% occupancy). These measures were enacted in order to keep people safe, however, due to their restriction of the mobilization, they had a huge impact on tourism in Ecuador and significantly altered the course of the industry (Cedeño,2020).

For instance, hotels all around the country were among the first affected, receiving numerous reservation cancellations by national, foreign and corporate tourists and events. Tour operators were also greatly affected, with cancellations spanning the entire first semester of the year 2020. As a result, the entire supply chain (including transportation, guides, informal vendors, freelancers, etc.) were left at a stand-still and suffered countless losses, primarily visible in the fast-growing rate of unemployment for many working directly and indirectly in the industry (Cedeño, 2020).

The Vice Tourism Minister, Ricardo Zambrano, conducted a virtual interview on March 18th, in which he analysed the three different scenarios if the industry were to stop for 30 days, 60 days or 90 days (Cevallos, 2020). He estimated that Ecuador would face a monetary loss of around $150 million USD if the tourism industry stopped for a month due to the COVID-19 pandemic. He went on to say that this amount would increase by more than a 100% if the industry stopped for two months, with an impact of $345 million USD; not only would this happen due to the decline of inbound tourism and limited foreign exchange earnings, but also because April is considered a strategic month (considering the Easter holiday). As of the time of publication, this data has not been calculated by an official government body - thus Ecuador will have to see the accuracy of his prediction. His final calculations showed that the economic losses for the tourism sector could potentially reach $540 million USD if the crisis continues for 90 days.

Zambrano clarified that these projections were meant to be precautionary, considering that the actual length of the State of Emergency is unknown. He added that the recovery of the sector will depend on each of the three scenarios, in addition to the aperture of financial credit and promotional incentives that the government can provide (Cevallos, 2020).

When taking into consideration the damages suffered by the tourism industry in Ecuador as a result of the COVID-19 pandemic, the most relevant consequences are the following.

Table 1 - Damages suffered by the Tourism Industry in Ecuador

The UNWTO projected that the world tourism industry would likely decrease by 20-30% in 2020 as a result of the COVID-19 pandemic. When these numbers were taken into account for ecuador's touristic section, it was estimated that between 80,000 and 134,000 people would no longer have a job. Prior to the pandemic, the tourism sector generated 600,000 jobs.
At the level of tourism operators, the smallest were in trouble and the largest were laying off staff due to the lack of Galapagos cruises.
According to figures from the ministry of tourism, the sector in 2019 employed 477,382 people. Of this number, Obiol the President of the Hotel Association of Ecuador, estimated that 50% were dismissed.
90% of Ecuador's tourism industry was made up of medium and small companies; 80% of these were affected by the pandemic (either through their labour, productive or economic spheres - or a combination). It is safe to say that the lack of income caused small businesses to fail and large ones to begin to falter.
Holbach Muñeton, President of the National Federation of Provincial Chambers of Tourism, calculated that the losses in income up to April would be close to $700 million USD.
From February 19th to march 27th, the economic losses estimated by the hotel establishments were $1,545,450, with the 3- and 5-star hotels having the highest losses.
As of mid-April, 3% was the maximum of occupancy of hotels. The hotel sector had had daily losses of $1.6 million USD in revenue, and occupancy rates had fluctuated between 0% and 3%.
André Obiol, President of the Hotel Association of Ecuador explained that tourism companies could not resist one more day and that is why the layoffs began and there were businesses that were in a final closure (some hotels had to pay their employees with food when firing them due to the lack of economic liquidity), adding that 30% of the restaurant area would not have the capacity to reopen.
As far as the airline industry, some were returning leased planes; others cancelled new plane acquisitions.
The most affected sectors were tourist operation services, tourist guides, restaurants, accommodation and events. Recovery is expected to start only in 2022.
Drafted by authors.

»»» *Ecuadorian governmental strategies to revive tourism after the pandemic*

As of mid-April, 2020, several governmental strategies had been developed and implemented in order to adjust to the COVID-19 pandemic, including:

» The government continued to consider entrepreneurship key to reactivating the sector, thus they promoted an open call program titled "Emprende Turismo" (Tourism Entrepreneurship) and created a tourism business incubator and mentor bank to help small entrepreneurs excel in their businesses. The Ministry of Tourism stated that they would strengthen investments in the sector and would continue to provide financial credit for tourism. Additionally, the public bank continued to generate lines of credit, refinancing and deferral of taxes based on the current needs of the sector; and the Bank of the Ecuadorian Social Security Institute (BIESS) had been providing a line of unsecured loans for tourism that remained active up til the time of publication.

» National, provincial, local and autonomous governments had been working with academia, businessmen and representatives of the industry in the private sector in order to develop a new strategy, to restore the confidence of the traveler and with the aim of understanding the economic labour and social impact in the tourism industry throughout the national territory. The information found by some Ecuadorian university academic representatives was collected in a single document (along with their criteria for future research) which was presented to the National Committee of Emergency Operations (COE), to ensure that necessary measures could be channelled to benefit the sector.

››› In order to maintain employment for those who worked in the industry, recovering the national market became a priority for the tourism revival agenda. Regarding the international market, a focus was put on growing tourism within the continental region - a strategy was in the process of being developed with other Latin-American countries (such as Peru and Colombia) to create combined products targeted at the European and North American markets; $3 million USD was allocated to promote these products.

››› The government worked on multiple campaigns, such as “Discover Ecuador from Home” (carried out in three stages; “Stay at Home” effective as of March 17th, “Discover Ecuador from Home” which started on March 26th and “Stay in Ecuador”, which is planned to start at the end of the health emergency) which focused on promoting tourism domestically, across all four “worlds” (environments) of Ecuador. Through the digital platforms offered by the Ministry of Tourism, citizens could tour the country virtually from the comfort of their homes. Over the next few months, the ministry also planned to launch a series of domestically inclined promotional tourism campaigns; including “I Miss You Ecuador” (which would seek to generate interest in local destinations using emotional marketing) and the reactivation of “Travel Ecuador” (which would encourage citizens to travel during specific seasons of the year as well as weekends and holidays).

››› The Ministry of Tourism developed a project titled “Agroturismo y Turismo Ecológico“ (“Agrotourism and Ecotourism”) which focused on these two niche branches of travel, which have been shown to be major pulls for tourists in the country and continuously burgeoning fields. The government was investing in related Agrotourism and Ecotourism projects as a strategy to recover the nation’s tourism industry and strengthen the local communities by introducing tourists to different cultures, production techniques and foods from the country.

››› Understanding that from the pandemic on tourists´ decisions would be made based on the health and safety conditions offered by destinations, care protocols were created across different branches of the tourism sector for travelers. These came into effect at the beginning of the health emergency.

››› The Ministry of Tourism determined that the recovery stage of the industry would be achieved over three phases: the first would be “Resistance” (in which actions would be promoted to maintain businesses and jobs in the sector), the following stages would be “Recovery” and “Reactivation” which would be fully flushed out as a result of an agenda articulated in the work tables of the ministry. Additionally, the sector pinpointed four keys to emerge from the pandemic: business capacity to adapt to major changes; search for new opportunities; rethink business models; and generate innovative elements that serve to reinvent themselves and meet the new requirements of travelers.

››› In order to meet the high demand for training from tourism service providers, the Ministry of Tourism was in the process of releasing nine online courses (for example food safety, tourism business innovation, and management of social networks for tourist destinations and establishments) from March 26th to June 10th; each training cycle would last 40 hours spread over 20 days and finish with a certificate.

Ecuador. Updates as of June 5th, 2020

› **May 6th:** the Galapagos Islands pushed a digital campaign to promote the reactivation of tourism after the pandemic.

› **May 12th:** technicians from the Ministry of Tourism carried out preventive control operations in tourist accommodation establishments where travelers arrived from abroad and carried out the mandatory preventive isolation (apo) ordered by national service for risk and emergency management.

› **May 14th:** The Ministry of Tourism presented a protocol of biosecurity measures for the food and beverage sector.

› **May 20th:** The city of Guayaquil (Ecuador’s epicentre of COVID-19) was put on “Yellow Light” of the Epidemiological traffic light system.

› **The development** of tourist routes that ensured health, safety and security for travelers began (as part of the “Recovery of Destinations” plan).

› **May 21st:** Under the slogan "I promise you Ecuador", the Ministry of Tourism started a new phase of the Discover Ecuador from Home campaign.

› **May 22nd:** The Ministry of Tourism promoted the "Reactívate Ecuador" Fund for the micro, small and medium tourist entrepreneurs of the country (with over $1.150 million USD to loan with a 5% interest rate). The Tourism Sector received biosecurity protocol by the Ministry of Tourism for the reopening of accommodation establishments.

The Ministry of Tourism submitted 101 tourism projects to the Ecuador Development Bank (BDE) for analysis with possibilities of obtaining financing.

› **May 25th:** Strengthening local identity and retaking market position were named as two of the strategies for tourism revival by the Ministry of Tourism.

› **May 28th:** The Ministry of Tourism trained Quito Tourism´s technicians on biosafety protocols.

› **May 29th:** The Ministry of Tourism carried out verifications of biosafety protocols in tourist accommodations.

› **June 1st:** Ecuador restarted domestic and international flights. Commercial passenger operations could be resumed with 30% of the authorized frequencies.

› **June 3rd:** The city of Quito was put on “Yellow Light” (Epidemiological traffic light system).

› **June 4th:** Biosecurity measures were being verified in tourist establishments by the Ministry of Tourism.

› **June 5th:** Ecuador sought to position itself as a bio-secure and sustainable destination, working alongside the public, private and academic sectors to achieve a speedy revival of tourism.

› **June 5th:** the Ministry of Tourism delivered a general biosecurity guide for tourist establishments in rural areas.

Figure 12 - COVID19 Timeline in Ecuador

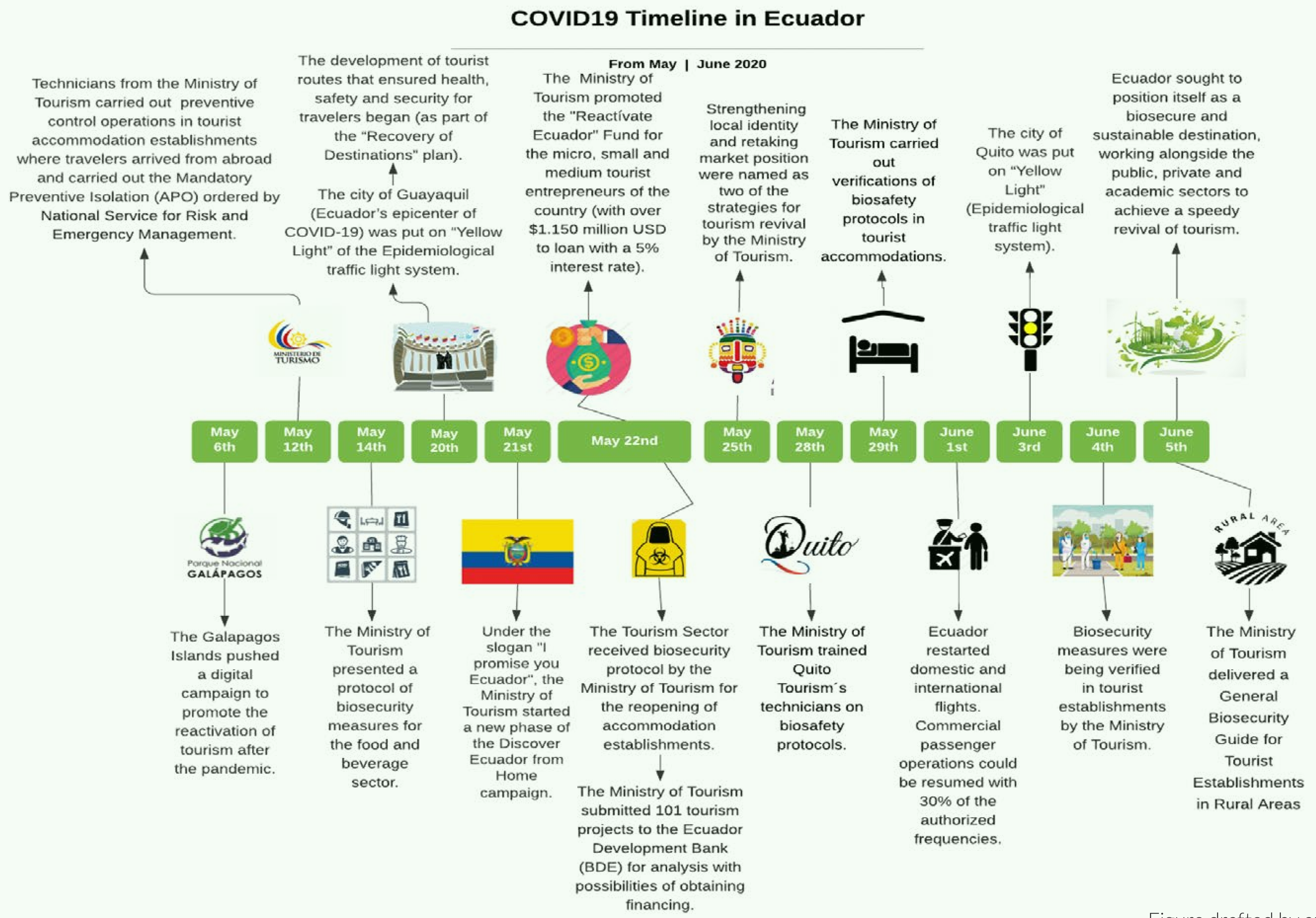


Figure drafted by authors

03

Italy

Daniela Apparente

Figure 13.- Map of Italy

Source: www.lonelyplanet.com, maps' section (Italy)

»»» *Tourism as the main asset of the country*

Tourism has been a primary economic asset for Italy for years; in 2019 alone, it constituted 13% of the country's GDP and the sector represented 4.2 million jobs directly (with many more indirect employees) (Bartoloni, 2020). Within that year it also saw a large improvement in terms of visitor arrivals – considering that the numbers in 2018 were totalled at 2,408,927 (a 4.4% drop from the previous), and rose to 2,429,722 in 2019 (a growth of +0.4%). This positive trend was also seen in Tourism Revenue: raising +10.5% from the previous year of 2018; this ultimately equated to an additional $4.883 billion USD, totalling to $51.602 billion USD mn by the end of the year (CEIC, 2020). Additionally, International tourism remained highly relevant for the country, increasing 6.6% between 2018 and 2019 - indeed, since 2017, foreigners have represented more than 50% of all total arrivals (specifically 50.5%) (Centro Studi Touring Club Italiano, 2020).

In terms of the domestic market, in 2019, 76.2% of travels made by Italians were to Italian destinations (ISTAT, 2020). In the same year, domestic tourism represented 13% of Italy's GDP (The Local, 2020) with a total spending amount of 139.2 billion euros (Statista, 2020). Of this, 5.9 billion euros were spent by Italian companies for business travel accommodation (Statista, 2020), and business tourism spending represented 1.2% of the country's GDP (Statista 2020).

The COVID-19 pandemic has brought an unexpected (but necessary) national lockdown which, in turn, infected the Italian economy. This hit the tourism sector especially hard. Due to the country-wide quarantine that started on March 8th, 2020, the sector had already lost almost 4 billion euros by the beginning of April. It is estimated that if these measures last until June, the loss might reach a value of approximately 7.7 billion euros (Statista, 2020). The country is expected to lose 28.5 million tourists in terms of visitor arrivals over the course of the summer for 2020 (mid-May through mid-September); it is likely this impact will hit especially hard in the destinations located in the "Red Zone" (an area where a sizable number of cases were registered and new hotspots are likely to appear again - in opposition to "Green Zones", where there are no longer COVID-19 cases) (Statista, 2020). For example, the regions of Veneto (home to Venice) and Lombardy (home to Milan) are expected to face a decrease of 4.61 million and 3.87 million arrivals respectively. Rome (and its region of Lazio), in the center of Italy, might face a decrease of 2.95 million. Southern Italy, which is less economically powerful, is also less likely to be hurt as badly by the pandemic – possibly enduring, for instance, a reduction of 1.42 million tourist arrivals in Campania and 1.14 million in Sicily.

In terms of Tour Operators and Travel Agencies - which employ approximately 50,000 workers - the ability to survive is going to be challenging. The difficulties for these companies will mainly involve two situations: many foreign destinations have closed off entry for Italians (giving less destinations to promote and sale) and many would-be-customers are likely to be cautious or scared about travelling not only during the lock-down, but for a lengthy period of time after the outbreak has subsided. Since the end of January, Tour Operators have been recording extra costs in the form of refunds for cancellations and tours that ended early, covering employee salaries in times of hardship, property rentals to be paid even when they cannot be occupied, and advances given to and penalties applied by suppliers - especially those that are foreign (Askanews, 2020).

In conjunction with the tourism industry, the transport sector is also suffering heavily. Due to the travel and flight bans that European countries are adopting - following Italy's example - passenger traffic at Italian airports has suffered a collapse of over 90% in March alone (Centro Studi Touring Club Italiano, 2020).

»»» How COVID-19 reached the country

On January 23rd, 2020, Italy found its first two cases of infection: a couple of Chinese tourists, who were hospitalized at the Spallanzani Institute in Rome. A little bit less than a month later, on February 21st, in Lombardy, the first confirmed case of an Italian resident appeared: a 38-year-old man was found positive with the disease and was hospitalized in the Codogno Hospital in Lodi; a city that ultimately became one of the most affected by the virus. The same day, a 78-year-old man in the city of Vo 'Euganeo (Padua province) became the first victim of the virus, having not been confirmed with the virus before his passing. From that moment onward, the epidemic grew incredibly quickly and spun out of control. On March 4th, the number of victims broke 100 and Prime Minister Giuseppe Conte signed a new decree that initially physically shut-down universities and schools throughout the country until March 15th. By March 8th, he declared a quarantine status for the entirety of Italy: the country itself became a "red zone", with no exceptions. Any travel or movement inside and between towns, cities and regions was prohibited - unless it was for urgent needs (which could be proven). Despite the mandatory restrictions, a huge number of people from the North escaped in the night for the South within the following days, overcrowding the last trains that were still running. Italy closed one terminal of Milan's main airport on March 16th, when it's region (Lombardy) already had 3,760 confirmed cases (Penney, 2020). By the end of the month, in Bergamo (one of the main cities in Lombardy), there were no longer cemetery plots available for the people who had died. The images of Army trucks transporting corpses to other regions became "famous" around the world. The State of Emergency (quarantine) was extended until early May, and by April 14th there were 162,488 cases of COVID-19 in Italy - of which 37,130 people healed and 21,067 died (Protezione Civile, 2020).

»»» Supporting the tourism sector: measures offered by the italian government

The Italian government published the "Cura Italia" Law Decree in the Official Journal of the Italian Republic on the 17th of March, which made an effort to fight the economic and social crises caused by the pandemic by

allocating a total amount of 25 billion euros to a social safety net, temporarily suspending taxes and mortgages, redefining family leave and allowing requests for bonuses for specific workers.(Gazzetta Ufficiale della Repubblica Italiana, 2020) From this, five key elements can be applied directly to the tourism sector (and may be particularly favorable for travel agencies) (Di Camillo, 2020):

» **Social safety nets** (art.19) - New dismissal procedures and short-term economic support are replacing the previous social safety nets, in order to support those companies which are making an effort in providing salary integrations (where the Italian government will pay a portion of employees' salaries in times of hardship) for a maximum duration of nine weeks; which, currently, should end no later than the month of August. In addition, small companies (up to 5 employees) have become exempt from wage supplementation (art.22);

» **Suspension of payments** - Both taxes on the income for employed and assimilated work, and for social security and welfare contributions have been put on hold. Two other suspensions: the VAT (commonly due in March) and the payment of any installments (such as mortgages or bank loans - payments can be made in a single solution by May 31 or in later installments, with a delay up to five months).

» **Bonus** - Effective as of March, two measures: first, a monthly allowance of 600 euros for seasonal tourism workers; secondly, a bonus (from the government) of 100 euros for employees who couldn't do smart or remote work and had to go to the office, to be determined by the number of working days carried out in their workplace (to be decided by the company). These measures may particularly favor travel agents who are registered in the Special Management of Commercial and Tourist Businesses (including owners of sole proprietorships, family businesses and partners who carry out their work in their agency).

» **Liquid asset support** - important measures were taken to support SMEs (small and medium enterprises) that do not have highlighted financial risks (art.56): until September 30th, existing bank credit cannot be revoked. In addition, all installments of mortgages, loans and leasing payments are suspended, to be determined by sending self-certified relevant information and documents. Loans can be extended up to double the residual term. The Guarantee Fund for SMEs is now able to intervene and supply loans free of charge, which will be guaranteed up to 5 million (art.49).

» **Voucher** - The government has approved the use of vouchers for reimbursement of travel tickets, tourist packages and contracts of stay, to be used within at least one year.

Italy
Updates as of
June 5th, 2020

› In April, with more than 105,000 infected, over 77,000 Italians still positive and almost 12,500 dead, Italy traced the exact day and recognized that the country had reached its peak of the infection on March 21st, 2020 (with 6,557 new cases compared to the previous day).

› Italy entered the second phase of the State of Emergency on May 4th, 2020. Some restrictions were released, even though there was not a large difference in the quarantine status overall; a few companies were able to start working again and people were authorized to go out to visit close relatives (within the first grade of familiarity).

› From May 18th, economic and production activities were allowed on the condition that protocols or guidelines (adopted at national level) were respected. Each region could adopt their own protocols. People could go out to work and/or meet with friends, but large gatherings were still strongly prohibited and subject to sanctions.

› From June 3rd, travel within the national territory was limited only with specific measures in relation to certain areas, mainly those which were more exposed to epidemiological risk. Flights and travel within the Schengen area were allowed again, but Italians wouldn't be allowed to go to each country of the European Union immediately (for example, Italians wouldn't be able to visit Greece until July).

› Experts declared that Italians would have to "live" with the virus until at least July, and that people might face other phases where the infection increases again - in periodic "waves".

› Meanwhile, the country tried to fight another kind of pandemic, the same that was affecting the entire world: the biggest economic crisis after the one in 2007-2008.

04

Spain

Diana Garcia Trujillo

Figure 14.- Map of Spain

Source: www.lonelyplanet.com, maps' section (Spain)

On January 31st, 2020, the Canarias (Canary Islands) was the first Autonomous Community in Spain to report a case of the newly found coronavirus, on La Gomera Island. By February 26th, there were a total of 10 confirmed cases among 5 autonomous communities (Canarias, Cataluña, Comunidad Valenciana, Comunidad de Madrid and Andalucia), and the overall risk of infection for Spanish public health was considered moderate (Departamento de Seguridad Nacional [DSN], 2020a). From there, the outbreak spread quickly, resulting in 2,002 cases and 47 deaths across the 17 Autonomous Communities (known as the CCAA) by the 11th of March. This rapid contagion led to the country entering into a reinforced containment and applying some of the first restriction measures, including then ban of direct flights from Italy and the suspension of events and teaching activities in most of the affected communities (DSN, 2020b).

On March 14th, with 5,753 cases and 136 deaths, the Government declared a State of Alarm throughout the National Territory via the "Real Decreto 463/2020, de 14 de Marzo"; which, within one month, was extended twice and will likely be again. The measures enacted included limiting the freedom of movement; suspension of all commercial activities, including hospitality and restaurant activities unless delivery was provided; the closure of public grounds and spaces, including those related with leisure; and the reduction of some public transport operations (rail, air, sea and road) within the country by 50% (Agencia Estatal Boletín Oficial del Estado [BOE], 2020a). As of the day after (March 15th), the virus had reached the entirety of the country, including the 2 Autonomous Cities of Ceuta and Melilla. On April 2nd, Spain surpassed Italy in total number of confirmed cases of the virus and has since remained second in highest number of cases globally, behind the United States (U.S. News & World Report L.P, 2020); and by mid-April, the country was still under the State of Alarm with stronger restriction measures, and the numbers were high and growing, with most of the cases concentrated in Comunidad de Madrid and Cataluña (DSN, 2020c).

As the situation continues evolving, considering that the lockdown has been extended more than once already, it is unclear how long the State of Alarm as well as the validity of its measures could last (La Vanguardia, 2020a). Given the number of economic activities on hold due to containment measures, the consequences of the COVID-19 pandemic are reaching many sectors, with tourism as one of the most affected.

»»» *What was tourism like in Spain before the COVID-19 pandemic?*

For the last 10 years, tourism has experienced a continuous growth, positioning Spain as a leading destination worldwide which offers a great variety of natural, cultural and historical attractions; as well as pleasant weather, great location and connectivity for visitors. Hence tourism is considered a key sector in and driver for the country's economy (Ministerio de Industria, Comercio y Turismo [MINCOTUR], 2019a). According to the latest data published (for the year 2018), tourism represents 12.3% of the total GDP, with a total contribution of 147,946 million euros, being this amount the highest by far (INE, 2019a).

In 2019, Spain had a record 84.7 million international tourists (+1.1% more than in 2018) who spent 92,278 million euros (+2.8% higher than the previous year), with an average of 1,102€ spent per person per trip. Out of this, the United Kingdom accounted for 21.5% of the international tourists; Germany for 13.35% and France for 13.32% - this was consistent, as these three countries have been the main markets for Spain for many years (MINCOTUR, 2020b). The main access point was the airport with 82% of the international tourists; followed by road with 15.2%; then port and train, which accounted for 2.2% and 0.4% respectively (INE, 2020b). Cataluña (home to Barcelona) was the most visited region with nearly 19.4 million visitors; followed by the Illes Balears (the Balearic Islands) with roughly 13.7 million and the Canarias (the Canary Islands) with approximately 13.1 million (INE, 2020c).

Domestic tourism has been significant too; Spanish residents took over 173.7 million trips within the country (89.6% of their total trips), and spent 32,014 million euros (66.6% of their total expenditure), with an average of 184€ spent per person per trip. Regarding the most visited regions, Andalucia (home of Granada and Sevilla) held the first place with 16.9% of the trips, followed by Cataluña (home of Barcelona) with 13% and Comunitat Valenciana (home of Valencia) with 10.2% (INE, 2020d).

Regarding touristic businesses in 2019, there were an average of 14,840 operating hotels which received 108.6 million tourists (48.4% domestic and 51.5% international); with 343.1 million overnight stays and an average occupancy rate of 65.9% (INE, 2020e; INE, 2020f). As for non-hotel touristic accommodation (tourist apartments, campsites, rural establishments and hostels) there were an average of 150,581 operating establishments (INE,2020g). In terms of employment, tourism was one of the industries that created the most jobs - accounting for 13.4% of the total employment rate in 2019, with 2.6 million direct jobs (3.5% more than in 2018); out of this, 1.6 million jobs were in hospitality, 317,227 were in transport and 667,255 were in other touristic activities (TURESPAÑA, 2019a).

»»» *Tourism in Spain and the pandemic*

The rapid spread of COVID-19 worldwide has led to a series of devastating events for the tourism industry across the board. Since the declaration of the virus as a Public Health Emergency of International Concern by the World Health Organization, travel plans, hotel bookings and major events have been cancelled around the world. For Spain, the sector was first shaken in February with the cancellation of the Mobile World Congress, an event that would have brought with it 492 million euros and created 14,100 new temporary jobs (El Periódico, 2020). This incident was followed by the cancellation of ITB Berlin, a massive travel show that

is one of the most important events in the sector; this took away the opportunity for Spanish agencies, hotels and Autonomous Communities to attract new tourists, promote the country and close important investment deals (ABC, 2020a).

The tourism industry relies on the demand for and willingness to travel, a dynamic labour force and free mobility; thus it is feeling the pressures imposed by the State of Alarm in Spain more than most other sectors. The closure of land borders on March 17th, 2020 and air and sea borders on March 22nd resulted in country-wide isolation and a ban of travel; since those dates only repatriation flights and freight flights transporting essential goods were allowed to depart and land in the territory. This situation could place 750,000 jobs at risk and cause a loss of 44,842 million euros for the Spanish economy (Hosteltur, 2020a). This economic strain has already been witnessed in the aviation sector; as early as the end of March, due to restrictions, there was a 91.1% decrease in flights, including 5,800 cancellations (La Verdad, 2020).

In addition, on March 19th, 2020, the government announced that all tourism accommodation had to close their services for the public (BOE, 2020b); then, on March 25th, 370 hotels were declared as essential and reopened only to accommodate workers from specific sectors (such as healthcare and supply and transportation of essential services) and some patients affected by the virus (MINCOTUR, 2020c). With operations suspended, it was estimated that, from March through May, hotels could lose 3,300 million euros in revenue and 80 million overnight stays (El Dia, 2020). Furthermore, due to the State of Alarm measures, the sector has already lost one of its primary seasons; according to the Federación Empresarial de Asociaciones Territoriales de Agencias de Viajes Españolas (FETAVE - the Business Federation of Spanish Travel Agencies Territorial Associations)(2020), 400,000 tourism companies lost 18,000 million euros over the Easter holiday, more than 70,000 flights were cancelled and 15 million hotel overnight stays were lost. This likely has put 2.5 million jobs at risk.

Given the above panorama, and due to the uncertainty as to when the situation could end, professionals of the sectors have forecasted different scenarios on the effects that this pandemic could have on the tourism industry. For example, Exceltur (2020)(a major non-profit group in Spain's tourism industry that includes the heads of the 28 leading Spanish tourist organizations across the sector) has estimated that the sector could lose more than 55 billion euros, resulting in a 32.4% drop in the tourism GDP; while La Mesa del Turismo (another important and highly regarded tourism businesses association) has estimated a loss of 25 billion euros if activities resume in June, a 45 billion euro loss and 60% less international tourist arrivals if they restart in July, and a 90 billion euro loss with massive job losses if the main markets (United Kingdom, Germany and France) restrain from travelling (Hosteltur, 2020b).

»»» *Action lines supporting tourism*

With the measures imposed by the State of Alarm, the pandemic has had a direct impact not only on the economy, but society as well. As a result, the Government has approved the "Real Decreto-ley 7/2020" and the "Real Decreto-ley 8/2020" to form the "Plan de Medidas Extraordinarias"; an economic plan of urgent and exceptional measures to reduce the impacts of the pandemic and re-activate the economy once the State of Alarm is over. As part of this, on March 12th, 2020, the government announced an initial financial aid package of 18 billion euros; then on March 17th, 2020, a further package of 200 billion euros (nearly 20% of the total GDP) was announced.

The economic plan focuses on:

› Supporting vulnerable groups, workers and families affected by this situation.

› Workforce protection.

› Guaranteeing liquidity for businesses.

› Supporting scientific research about COVID-19 to develop medicines and vaccines against the current and future outbreaks.

(BOE, 2020c)

As part of the economic measures, an ICO (a state-owned bank) financing line with 400 million euros was approved for self-employed individuals and companies from the sector in need of liquidity; the payment of interest and amortization for EMPRENDETUR loans (only given to research, development and entrepreneurial projects in the tourism industry) has been suspended for a year; and the deferment and fractionation of tax payments were allowed for self-employed individuals and companies from the sector. In addition, the deferment of social security debt payments until June 30th, 2020 was approved, as well as the exoneration of social security contributions for companies that had to apply temporary suspension of contracts or reduction of working hours (MINCOTUR, 2020d).

As for plans to re-activate tourism after the pandemic, the Autonomous Communities are already working on their promotional campaigns, expecting that domestic tourism will be the first market to bounce back. Technology is playing an active role in promotion, as well as for gathering information about what travelers will be looking for in the future. Also, some destinations such as Cataluña and Pais Vasco are working on health and safety protocols in order to adapt to the new paradigms and reassure travelers that they can travel again without concern (Hosteltur,2020c).

Spain. Updates as of June 5th, 2020

› Nearly 3 months since the initial State of Alarm was declared by the Government, the measures had been extended for a total of six times, as per the "Real Decreto 463/2020, de 14 de Marzo", and was subject to end on June 21st, 2020 (BOE, 2020d). A study conducted by The Imperial College of Science, Technology and Medicine, estimated that the confinement measures had saved around 450,000 lives in Spain (El Español, 2020a).

› The Ministry of Health confirmed that Spain had reached its peak and started flattening the epidemic curve by mid-April; there was a downward trend with a steady 2% increase in infections (ABC, 2020b).

› By the end of April, the Government approved the "Plan for the Transition towards a New Normality". A plan with guidelines to restart economic activities, that proposed a gradual de-escalation in 4 phases; the measures would be continuously updated and/or eased as the de-escalation evolved. As for tourism and leisure activities the following parameters were established:

	Phase 0	Phase 1	Phase 2	Phase 3	Phase 4
Restaurants	Take away service	Terrace service, 50% capacity	Terrace and inside table service, 30% capacity	50% capacity while keeping tables distant	New normality starts Epidemiological surveillance is maintained Expected to be reached at the end of June
Accommodation		Can operate with common areas closed	Common areas can open at 30% capacity	50 % capacity of common areas, maintaining distance	
Cultural and Leisure attractions		Museums, theatres with 30% capacity	Monuments, events grounds at 30% capacity		
Night clubs and Bars				Open at 30% capacity, maintaining distance	
Tourism activities		10 people maximum for ecotourism and active tourism, within same provinces	Beach can be visited, monitoring capacity	Capacity is more flexible for eco/ active tourism, and beaches	

(Ministerio de Sanidad, Consumo y Bienestar Social [MSCBS], 2020a; El Confidencial 2020a)

Tourism was one of the most affected sectors by the pandemic, with consequences never seen before:

› In April there were zero tourism flows and expenditures (100% less than 2019).

› This translates to a loss of nearly 10,000 million euros (2,768 million euros from domestic tourism and 7,095 million euros from international tourism). (Hosteltur, 2020d).

› Overall, the panorama of tourism for the first four months of the year was devastating; and far from reaching the growth of previous years:

International tourists Arrivals	10.6 million (51% less than in 2019)		
International tourists expenditure	11,707 million euros (48% less than in 2019)		
Domestic tourism	No available data for 2020 at the time of this research		
Touristic Accommodation businesses	160,000 closed for operations: 15,200 hotels; 145,437 non-hotel		
Economic loss	10,782 million euros for international tourism 8,272 million euros for domestic tourism (using the domestic tourism data from last year).		
Employment (end of April)	-12.5%, compared to the same period in 2019	957.106 workers affected by ERTE (temporary contracts suspension or reduction of working hours)	In February 2020, tourism represented 12.7% of Spain's working population, which had dropped to 11.9%

(La Vanguardia, 2020b; INE, 2020h TURESPAÑA, 2020b; El Español; 2020b)

› The impact for May is expected to be similar to April; since lockdown measures, the closure of borders and travel restrictions all over the world were still in place. However some variances may be expected for future statistics. From May 4th, the de-escalation plan started and all the territory entered into phase 0, except the Islands of Formentera (Illes Balears), El Hierro, La Graciosa and La Gomera (Canarias), which entered directly into phase 1 (El Confidencial, 2020b). By May 25th, nearly 47% of the population were in phase 2, and 53% of the population were in phase 1 (El Confidencial, 2020c).

› As of June 1st, the Islands of Formentera, El Hierro, La Graciosa and La Gomera entered into phase 3. Nearly 70% of the population were in phase 2, including Comunidad Valenciana and Andalucía; while 30% remained in phase 1, including Comunidad de Madrid, and some areas of the communities of Cataluña and Castilla y León (El Confidencial, 2020d).

› The expectations for tourism in June remained a big unknown, but there was hope. Although the government had announced that international borders would be opened on July 1st, the land borders with Portugal and France were scheduled to open on June 21st (Hosteltur, 2020e).

› A pilot project on safe tourism corridors between Schengen countries was approved and was scheduled to start on June 15th. Initially Illes Balears (Mallorca, Menorca, Ibiza and Formentera) would gradually receive a total of 6000 German tourists (as it is one of the most important inbound markets, and has very similar epidemiological data). The project would monitor the protocols of security and mobility at the destinations; and, depending on the outcome, it could be implemented in other communities (Hosteltur, 2020f; MSCBS, 2020b).

› The Government was also working on a coordinated plan with all the autonomous communities for the recovery of tourism. The plan was based on a complimentary economical aid package, increased industry knowledge and the repositioning of Spain as a safe and sustainable destination. As part of the complementary economic package, 75 million euros would be designated to the Smart Tourism Destinations Network, 70 million would be invested in sustainability projects and 1 million euros would be designated to create a Tourism Intelligence Observatory (MINCOTUR, 2020e; Hosteltur 2020g).

› As of June 5th, 2020, there were a total of 240,978 confirmed cases and 27,134 deaths; and viral transmission and death rates were low (DSN, 2020d). Given that the pandemic is not over yet, it is quite uncertain what the real impact on the industry will be; but soon all of Spain will be under the “new normality” and ready to bring tourism back to life.

05

The United States of America

Samantha Anderson
& Carolyn Manning

Figure 15.- Map of the United States of America

Source: www.lonelyplanet.com, maps' section (United States of America)

Prior to the COVID-19 pandemic, domestic and international travelers in the United States spent an estimated $1.1 trillion USD in 2019 and supported 9 million jobs. The U.S. Travel Organization reported that, "Direct spending by resident and international travelers in the U.S. averaged $3.1 billion a day, $128.6 million an hour, $2.1 million a minute and $35,700 a second". In fact, international visitors spent an average of $4,200 USD per person per trip. Ultimately, tourism activities in the United States resulted in $277 billion USD in payroll income and $180 billion USD in tax revenue; and the World Travel and Tourism Council reported that in 2019 tourism in the United States contributed 8.6% of the GDP and 10.7% of employment.

The U.S. Travel Organization reports that in 2019, 79 million international visitors came to the United States. The top inbound markets were Canada and Mexico followed by the United Kingdom, China and Japan. Within the last 4 years, the amount of international visitors to the United States decreased from 6.4% of global arrivals in 2015 to 5.4% in 2019. The top activities amongst international travelers included shopping, sightseeing, fine dining, national parks/monuments and amusement/theme parks. Travel and Leisure reported in 2012 that the top tourist attractions by number of visitors were as follows: Times Square in New York City; Central Park in New York City; Union Station

in Washington DC; the Las Vegas Strip; Grand Central Station in New York City; Disney's Magic Kingdom in Orlando, Florida; and Disneyland in Anaheim, California.

Domestic tourism has also played a major role in the country; in 2019 alone, domestic travel directly supported 7.9 million jobs, with travelers spending an overall $972 billion USD (representing 86% of total travel expenditures). Though U.S. travelers took 463.6 million domestic business trips in 2018 (Statista, 2020) and approximately 464 million in 2019, the majority of trips were taken for leisure the latter year (with a total of 1.853 billion). Overall, before the COVID-19 pandemic, domestic tourism had been on the rise, while international tourism had taken a small plumet (U.S Travel, 2020).

»»» *The COVID-19 pandemic in the United States of America*

On January 19th, 2020, the Center for Disease Control and Prevention (CDC) confirmed that the first case of the new "novel coronavirus" had been found in the United States in Seattle, Washington. The patient was a 35-year-old man who had been visiting Wuhan, China the previous week to see family. After a few more cases were found (all associated with residents who had recently visited Wuhan), the White House formed the Coronavirus Task Force and began evacuating State Department employees from the city of Wuhan. On January 31st, the Trump Administration imposed restrictions that blocked foreigners (both immigrant and non-immigrant) who had been physically present in China within 14 days of their date of travel from entering the United States. Although there were already CDC screenings present in five major U.S. airports testing all passengers coming from Wuhan for symptoms (beginning January 17th), it was determined that travel restrictions were ultimately the best course of action, as it would be too difficult to screen every person entering from China in all major airports (for example - in 2019, more than 14,000 people entered the United States from China daily). The administration also declared a public health emergency within the country, as per the World Health Organization's international classification the previous day (The White House, 2020a).

New cases seemed to spread slowly in February, however, U.S. nationals were still being evacuated from China as well as other impacted places (such as the Diamond Princess cruise ship quarantined in Japan). It would be discovered in April that the first

death attributed to COVID-19 in the United States occurred on February 6th in California. In the meantime, the CDC was struggling to produce testing kits for the virus that could be processed outside of their facility in Atlanta and public health and health-care agencies were warning about an expected shortage of supplies and equipment necessary to fight a nation-wide outbreak. Additionally, the Trump Administration was being criticized for downplaying the threat of COVID-19 and ceasing to act quickly enough (Cohen and Merrill, 2020). On February 29th, said administration issued a travel ban similar to the one previously seen for China, this time focusing on the Islamic Republic of Iran.

Though COVID-19 seemed to move slowly in February (having less than 100 cases by the end of the month), the contagion spread quickly in March. By March 11th, there were over 1,000 cases across the country. That same day, the Trump Administration issued another travel ban for those originating from any country in the Schengen Area and, on March 14th, did the same for those traveling from the United Kingdom or the Republic of Ireland (The White House, 2020b). During this time, only United States citizens and permanent residents were allowed to travel into the country, which brought with it unforeseen challenges in travel protocols. Passengers' passports were thoroughly checked at their departure airport and they could land in only thirteen airports, where they would go through enhanced CDC screening to test for symptoms (including having their temperatures taken) before proceeding through customs. When initially enacted, many airports experienced extended wait times of up to 7 hours due to the added screenings; this greatly concerned participants who had intended to follow social distancing recommendations, as they found themselves standing in lines in contained spaces with hundreds of others for hours (Murphy and Silverman, 2020; Fausset, Stockman, and Kanno-Youngs, 2020). Within days, after heavy criticism from passengers, media outlets, and government officials, this process was streamlined and wait times were normalized. Travelers were then required to self-quarantine for 14 days after arrival, however this was not enforced by any governing body upon leaving the airport (Center for Disease Control and Prevention, 2020a).

On March 15th, President Trump called for Americans to stop social gatherings of 10 or more people for the next 15 days (which would later be extended); and, on March 19th, California was the first state to implement a stay-at-home order. These orders only allowed businesses and organizations considered to provide "essential services" (such as hospitals, pharmacies, and grocery stores) to stay open, and emphasized leaving the home as little as possible and social distancing to discourage further spread. Over the next month, many more states would also implement stay-at-home orders (by April 8th, only five had no rules at all). It is important to note that so far no stay-at-home orders have been issued at a federal level. Additionally, on March 19th, the total number of cases of COVID-19 reached over 10,000; and by March 26th, the United States became the country with the highest number of cases, surpassing China, with 83,836. As of the time of publishing, the USA still holds this position. On March 27th, President Trump signed the $2 trillion USD “Coronavirus Aid, Relief, and Economic Security Act” stimulus package, meant to provide support to those suffering financially due to the economic impact of the COVID-19 pandemic.

On April 1st, the USA surpassed 200,000 cases and on April 11th, it became the country with the most COVID-19 deaths in the world (19,700). As of April 14th, all 50 states had reported fatalities caused by the virus, totaling to 21,972 (WHO), and the total number of cases was recorded at 605,390 (CDC). The United States is, as of the time of writing, at its peak within the pandemic. It is projected that these numbers will continue to rise and the economy will continue into a recession, with no official end date currently in sight.

»»» *Impact on the tourism industry during the COVID-19 pandemic*

COVID-19 has made a massive impact on the tourism industry as well the economy in general. Roger Dow, the president and CEO of the U.S Travel Association, said that the impact as of early April 2020 was already six to seven times greater than that of 9/11. To put that into perspective, according to the New York Times, it took 5 years for the same level of tourism seen previously to 9/11 to return to New York City (Corasaniti & Wolfe, 2017). In an article by Forbes related to economic losses stemming from COVID-19 released April 1, 2020, it was predicted that there would be a $400 billion USD decline in travel spending in the United States within 2020; which would result in a total loss of $910 billion USD in economic output across all industries that directly and indirectly benefit from tourism (Thiessen,2020).

By mid-April, 2020, federal, state, county and city governments had created different laws, restrictions and policies concerning COVID-19 and stay-at-home mandates. In a majority of the states, travel and tourism operations were shut down. People were still allowed outside of their homes, but most parks, beaches and other public areas were closed and nonessential travel was not encouraged or easy to accomplish.

By April 14th, 2020, twenty-two million Americans had filed for unemployment due to layoffs and furloughs (CDC, 2020). The majority of these were directly associated with the COVID-19 lockdowns. The tourism industry was greatly impacted in this regard. This could be particularly seen when viewing the unemployment statistics for the Leisure and Hospitality industry over a four month period, going from 5% in December 2019 to 8.1% in March 2020 (U.S. Bureau of Labor Statistics, 2020). The U.S. Travel Association estimated that 5.9 million travel-related jobs would be lost by the end of April (2020).

On March 27th, 2020, in response to the high employment stats and suffering economy, President Trump signed a $2 trillion USD relief bill aimed at protecting the United States during the COVID-19 State of Emergency. It included a one time payment of stimulus checks to individual citizens and permanent residents and additional funds to be spent on loans and grants for businesses, health-care funding, and unemployment insurance (Pramuk, 2020). By April 14th, stimulus checks of $1,200 had gone out to people making less than $75,000 a year (IRS, 2020) and states and counties were creating additional ways to help workers during the economic crisis. On the same day, the CARES Act was signed into action, which set forth the Paycheck Protection Program in order to provide loans for small businesses affected by COVID-19. The most relevant loan program for the majority of tourism businesses up until April 14th, was the Paycheck Protection Program (PPP). These loans received from the program focused on maintaining businesses and their employees, with 75% of the loans going to payroll and the other 25% allocated to essentials, like rent. PPP loans were $10 million USD or less. However, the PPP, a $376 billion relief act, came with some major initial issues. The first round of the funds ran out in 13 days. The paperwork was confusing and there were technological problems. Funds were misdirected and large corporations like Shake Shack and the L.A Lakers were recipients. Both Shake Shack and the Lakers returned their loans after scrutiny from the public, but many of the large corporations receiving them did not. In the world of travel, there was controversy about the $6.6 million USD loan granted to Lindblad Expeditions, a luxury cruise company.

As COVID-19 continued to peak around the United States, airlines saw a 95% decrease in travel as top U.S companies such as American Airlines and Delta noted that they were 90% down in revenue for the quarter in comparison to 2019. After over a month of discussions, on April 14th, 2020, the United States Treasury Department reached a tentative bailout deal with large U.S. airlines. This was in sharp contrast to the $15 billion USD airline bailout given after the 9/11 terrorist attacks, which went from introduction to presidential approval in only two days (Holguin, 2002). Though originally asking for $54 billion USD in March, 2020, the eventual deal allocated $25 billion USD and came with very specific restrictions for use of funds (Rapier, 2020; Bloomberg, 2020; Tully, 2020).

Parallel to the airlines, other large tourism industries, like cruising, also experienced heavy economic losses. This sector is vital to the United States, as the country serves as the headquarters for 40 major global cruise companies. In February, 2020, the Diamond Princess was the first cruise ship reported to have a massive outbreak of COVID-19 with over 700 infected and 14 deaths. Other ships followed suit, with cruise ships temporarily serving as an epicenter for the virus. On March 14th, the CDC put out a “No Sail” order on the cruise line industry, which was extended on April 9th (Center for Disease Control and Prevention, 2020b). This left approximately 100 cruise ships idle, containing about 80,000 crew (Woodyard, 2020). Many cruise lines suspended all voyages and stocks and company values dropped as much as 60-70% depending on the company (Business Wire, 2020). Many countries closed off their ports, which cut off cruise companies from key destinations (for example, this was seen continentally with Canada blocking access to Alaskan cruises) (Berry and Guettabi, 2020).

Not only was Alaska impacted due to the pandemic, but other states that rely heavily on tourism experienced economic decline. This was seen in states such as Colorado, well known for its ski resorts and outdoor excursions which were closed prematurely in the season (Svaldi, 2020); Florida, recognized globally for its theme parks and attractions like Walt Disney World and SeaWorld, all of which were no longer operating (Ward, 2020); and Hawaii, which was projected to be the hardest hit state in terms of tourism due to being the most reliant on the industry (McCann, 2020; Sinco Kelleher, 2020).

The United States of America. Updates as of June 5th, 2020

› From the period of April 14th to June 5th, 2020, the United States experienced a large increase in cases and deaths from COVID-19. Despite this, businesses and public places began to reopen as federal distancing laws expired and protests about restarting economic activities and letting people return to work emerged. Due to massive job losses throughout the spring and the issues listed previously with the PPP, more money was put into business protection programs and the federal government added $600 a week onto all unemployment checks. Amidst the pandemic, on May 26th, 2020, George Floyd, a black man in Minneapolis, unjustly died at the hands of the police over video. Protests broke out across the United States in order to revolt against systemic racism and police brutality. The Black Lives Matter movement of June, 2020 became the biggest civil rights movement in the world and protests continued as of the date of publication.

› April 15th, 2020: Protests to reopen economic activities and businesses started emerging amongst multiple states as a response to “stay at home” orders.

› April 16th, 2020: The White House started issuing guidance to reopen parts of the economy.

› April 20th, 2020: The states of Tennessee, Georgia and South Carolina were the first states to start the first phases of opening up businesses.

› April 21st, 2020: the FDA approved at-home testing kits that people could use for COVID-19. This gave the ability to mail results.

› April 23rd, 2020: $320 billion USD is allocated into the Paycheck Protection Program (PPP).

› April 28th, 2020: The United States surpassed one million cases, equating to one third of the worldwide cases.

› April 29th, 2020: The United States economy saw its first drop in output since 2014, decreasing by 4.9%.

› April 30th 2020: The federal social distancing guidelines, which were implemented in mid-March, expired leaving state and county governments in charge of their own regulations.

› May 6th, 2020: Unemployment hit 14.7% with a loss of 20.5 million jobs in the month of April.

› May 11th, 2020: More than 15 states started moving forward with varying phased plans to reopen businesses.

› May 15th, 2020: The United States hit 85,000 deaths and the Trump administration announced Operation Warp Speed, which was an effort to release a vaccine before the end of 2020.

› May 25th, 2020: Memorial Day weekend saw a break in social distancing as people emerged from their homes, creating crowded beaches, outdoor spaces and shops holding sales.

› May 26th, 2020: George Floyd, a black man in Minneapolis, was killed at the hands of the police for a possible fraudulent check.

› May 27th, 2020: The death toll from COVID-19 surpassed 100,000 in the United States. Black Lives Matter protests started in all major cities around the United States.

› June 3rd, 2020: Over 200 major cities in the United States mandated curfews and 27 states brought in the National Guard in response to the Black Lives Matter protests.

› June 5th, 2020: The unemployment dropped to twenty-one million, and the percentage of unemployment dropped by 1.4% in May as local economies slowly began to reopen.

› As of June 5th, the United States remained the global epicenter of COVID-19, with a total of 1,891,690 cases and over 104,500 deaths. These cases were continuing to grow, rather than dissipate.

When We Travel Again:

A look to the future of tourism

01

What did the tourism industry do to fight the crisis?

Samantha Anderson, Daniela Apparente, Juan Henao Bradford, Diana Garcia Trujillo & Carolyn Manning

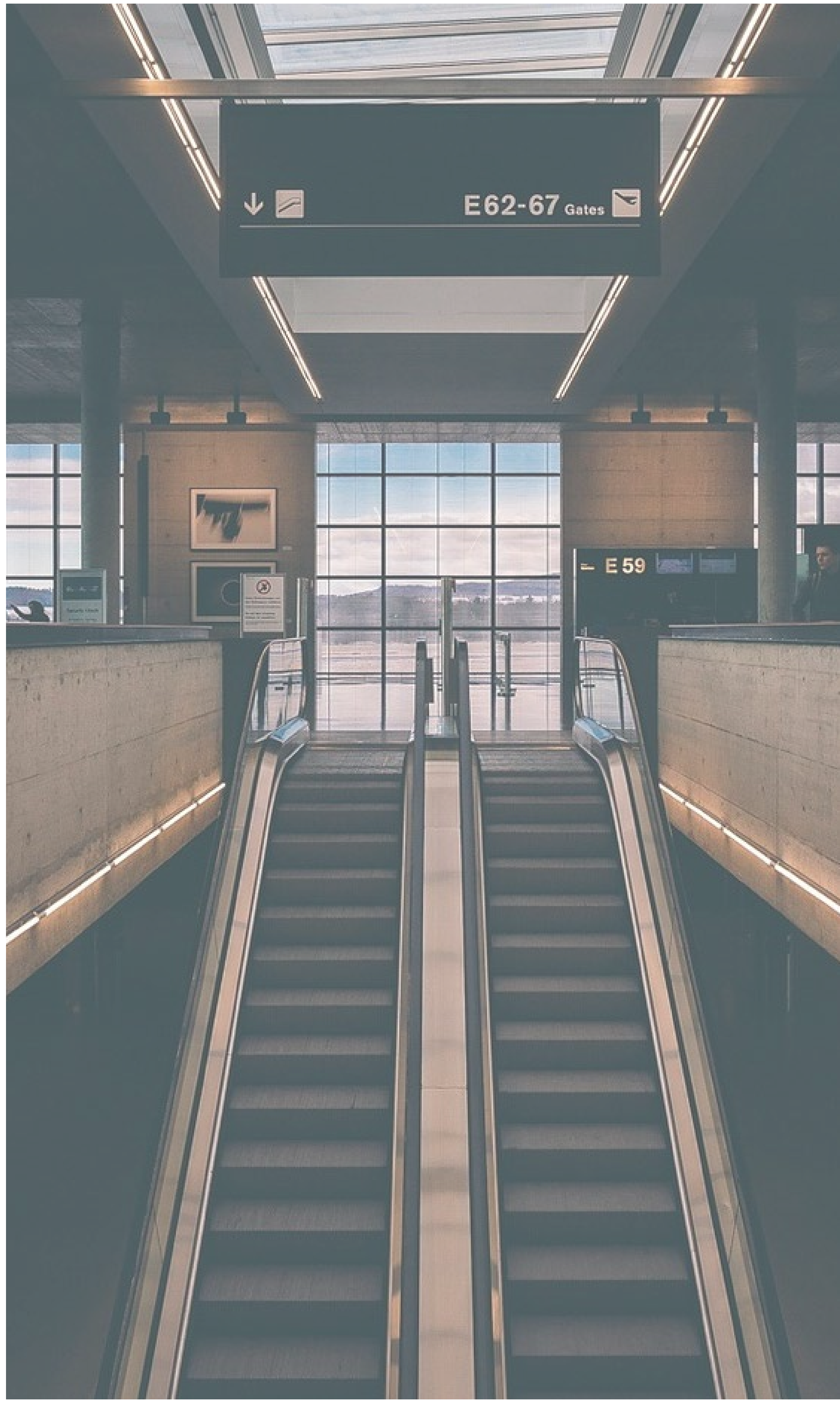
Unfortunately for the tourism industry the first and necessary reaction to the COVID-19 pandemic was cutting overall costs. This meant pausing operations, letting employees go, creating furloughs and introducing major pay cuts. In April 2020, the World Travel and Tourism council projected that the pandemic would lead to a global loss of 75 million jobs and a $2.1 trillion loss in revenue (WTTC, 2020). Despite massive cuts, the industry remained optimistic and created a plethora of innovative ideas to keep travel on the radar. These concepts can be broken into the following categories; virtual experiences, cancellations and rescheduling, reallocation of industry resources, industry collaborations and new innovations.

»»» *Virtual experiences*

Virtual experiences became a popular way to keep customers informed and engaged as technology was seemingly one of the only ways to engage travelers during COVID-19. Different companies launched new strategies, such as Philadelphia-based online travel agency The Tour Guy, which pushed forward virtual tours. Each tour had a cost of less than $20 USD and included questionnaires, surveys, and a live Q&A. Berlin-based global online marketplace for tour guides and excursions GetYourGuide launched a series of virtual experiences to offer some of its most popular tours and activities online to travelers. San Francisco-based world tourism industry titan Airbnb launched "Online Experiences", a new initiative that gave hosts the opportunity to run both their existing experiences and create new ones for a virtual space; this could range from wine classes, to tango concerts, meditation and more. For example, the popular live experience of a burlesque class in Los Angeles was offered online for $10 USD for an hour and a half versus the normal $15 that would be charged in person. The Canadian company CMH Heli Skiing launched virtual reality ski tours that people could enjoy from home via different online platforms.

Outside of offering virtual experiences, some companies also created their own streaming platforms. Viking River Cruises was one of the numerous cruise companies that created their own television platform in response to the crisis. Viking.TV was an extensive online video platform that offered a variety of shows available to stream anytime, as well as new offerings published daily. The shows were broken into categories including Viking Family, Destination Insights and the Viking World. The streaming platform included live music, lectures with resident historians and shows on language (Viking Cruises,2020).

In addition, DMO's started to offer virtual experiences of their destinations along with attractions such as museum tours, Broadway shows, orchestras (the latter two were streamed, usually for free and at set times, on the internet). An example of this was seen in Egypt, where the Tomb of Nefertari opened globally to the public via virtual steaming.



»»» *Cancellations and rescheduling*

Many companies gave credit to their customers for future travel for the trips people were unable to take. This was the case with most airlines, whose refund and rescheduling policies changed regularly throughout the outbreak. Large global tour operators such as Intrepid Travel and Topdeck Travel gave their guests full credit with additional credit to add onto their future booking, whilst others adhered to their usual terms and conditions and offered a partial refund or no refund at all. On March 14th, 2020, Airbnb updated their "extenuating circumstances" policy to allow guests to cancel their homestays or experiences without charge as long as reservations had been made before March 14th and check-in dates were between then and April 14th. Many guests were grateful to receive full refunds, but hosts objected to the measure as that meant they would likely be making no income from the platform during that time. In response to feedback, Airbnb announced on March 30th that they would provide $260 million to be used as a relief fund for those who suffered from the refunds (Keveney, 2020). They additionally created a "Superhost Relief Fund" of $17 million available for hosts that were struggling financially during the crisis. Eligible hosts sent in applications for relief, these were reviewed by Airbnb, and, if approved, they could receive grants of up to $5,000 to help in time of need (Airbnb, 2020).

»»» *Reallocation of industry resources*

In response to COVID-19, numerous hotels began offering their empty rooms to accommodate healthcare workers, patients or people that were without homes; while other hotels experimented with allocating the rooms for alternative services like at-home offices. For example, the Four Seasons in New York City offered 225 of their rooms specifically for healthcare workers, with a minimum 7-night stay (Schonfeld, 2020). On April 1st, 2020, Mitchell Katz, the CEO and President of NYC Health claimed that 10,000 beds amongst 20 hotels in New York City had been secured for noncritical patients to quarantine (Schonfeld, 2020). Other hotels, like the London West Hollywood in Los Angeles, started selling their rooms as private office spaces that could be used for the day along with an included lunch. Additionally, public spaces often used by tourists were also utilized, as was seen when make-shift hospitals popped up in Central Park and the US Open Tennis Center (Tsioulcas, 2020).

»»» *Industry Collaborations*

Impact House, an eco hostel in Lisbon (Portugal), started a partnership with Uber Eats and Happy Cow, where they offered vegetarian and vegan meals to the public that normally would only be available to their guests. On top of that, their excess food was donated to nearby hospitals that were fighting against the pandemic. El Tenedor (a TripAdvisor company specializing in restaurant bookings and food delivery) created the project "Salvemos nuestros restaurantes" (Let's save our restaurants), to help more than 1,000 restaurants maintain liquidity while containment measures were in place. Through its website and app platforms, people could buy pre-paid vouchers that could be used once restaurants were able to open again. (La Vanguardia, 2020).

»»» *New innovations*

In an effort to bring new ideas into the global sphere, the UNWTO ran a competition from March 25th to April 10th, 2020 titled the "Healing Solutions for Tourism Challenge", which sought to find innovators in the tourism sector. After receiving over 1,000 applications from 100 countries, 9 winners of the challenge were divided into three categories: "healing for people", "healing for prosperity" and "healing for destinations". They were then able to present their ideas to the UNWTO Member States (representatives of more than 150 governments) on May 7th, 2020 (UNWTO, 2020).

Not only were governing bodies working on innovations within the industry, private companies also took on this hurdle. This could be seen with ImpacTrip, a B-Corp[5] sustainable tour operator specializing in volunteering programs in Europe, who was able to translate their business model into an online space, offering remote volunteering opportunities. These online programs assisted non-profit organizations and NGOs by having volunteers with particular skills support them with tasks (such as providing professional translations of documents, creating and implementing websites, and running online fundraising campaigns).

Virtual intelligence played an important role during the pandemic, which could be seen with the Spanish chatbot startup 1MillionBot. 1MillionBot created a virtual assistant program called "Carina". This tool was able to answer questions related to COVID-19 by gathering information from official sources such as the World Health Organization and the Spanish Ministry of Health. By mid-March 2020, during the first stage of its launch, 1MillionBot had answered more than 10,000 questions with an 88% success rate. Different organizations, including those from the tourism sector such as "HOSBEC" (a hospitality association from Benidorm, Costa Blanca and Comunidad Valenciana) and "Visit Benidorm", installed Carina as a way to respond to emerging needs based on the circumstances (Hosteltur, 2020b).

5. Certified B-Corporations are for-profit companies that have a positive, measurable impact on their workers, customers, suppliers, community, and the environment. This private certification was created in 2016 by B Lab, a global non profit organization. Among the companies that have received this certification: Patagonia Works, Natura Cosméticos SA, Cotopaxi, Uncommon Goods.

02

Forecasting the tourism industry

Johanna Coral Flor &
Gabriela Vera Cardenas

With a historically promising future, the tourism industry has rapidly gained importance and a favorable reception around the globe; not only as a means to boost economies but also as a key driver for socio-economic progress. It has been proven that tourism has the power to be a major contributor in international commerce, representing the primary income source for many developing countries (World Tourism Organization, 2020). For this analysis, two different timelines have been taken into consideration due to their relevance: forecasting previously reported and expanded on Pre-COVID-19 (going through the year 2030), followed by a separate analysis taking into account likely Post-COVID-19 conditions.

»»» *Forecasting data from the world tourism organization pre-COVID 19*

As one of the fastest growing industries in the world, it is not surprising that the forecast for the tourism sector was going to have favorable results prior to the pandemic. Over multiple years, projections and tendencies were analyzed by the United Nations World Tourism Organization (UNWTO) with the purpose of forecasting future data and behaviors in order to have a general idea of upcoming trends this sector may have. The UNWTO publication "Tourism Towards 2030/Global Overview" presented a set of detailed quantitative projections for international tourism demand for the next two decades, starting with the year 2010. This was constructed based on three independent variables: "international tourist arrivals as a depending variable with the growth of GDP", "an estimation of the traveler affluence and business travel potential" and finally the cost of transport (World Tourism Organization , 2011).
This long-term forecast replaced the Tourism 2020 Vision that was initiated in the 1990´s (previously a worldwide reference of international tourism forecast). Additionally, this updated forecast was enhanced with an analysis that took under consideration the social, economic, political, environmental and technological factors that have historically shaped the industry in the past, with the expectation to influence the sector in the future (World Tourism Organization , 2011).

The following figure contains some of the most relevant information of the UNWTO publication "Tourism Towards 2030/ Global Overview", highlighting the following projections and comprising what is known as the "central scenario":

› By 2030, international tourist arrivals were expected to reach 1.8 billion (with an average increase of 3.3% yearly).

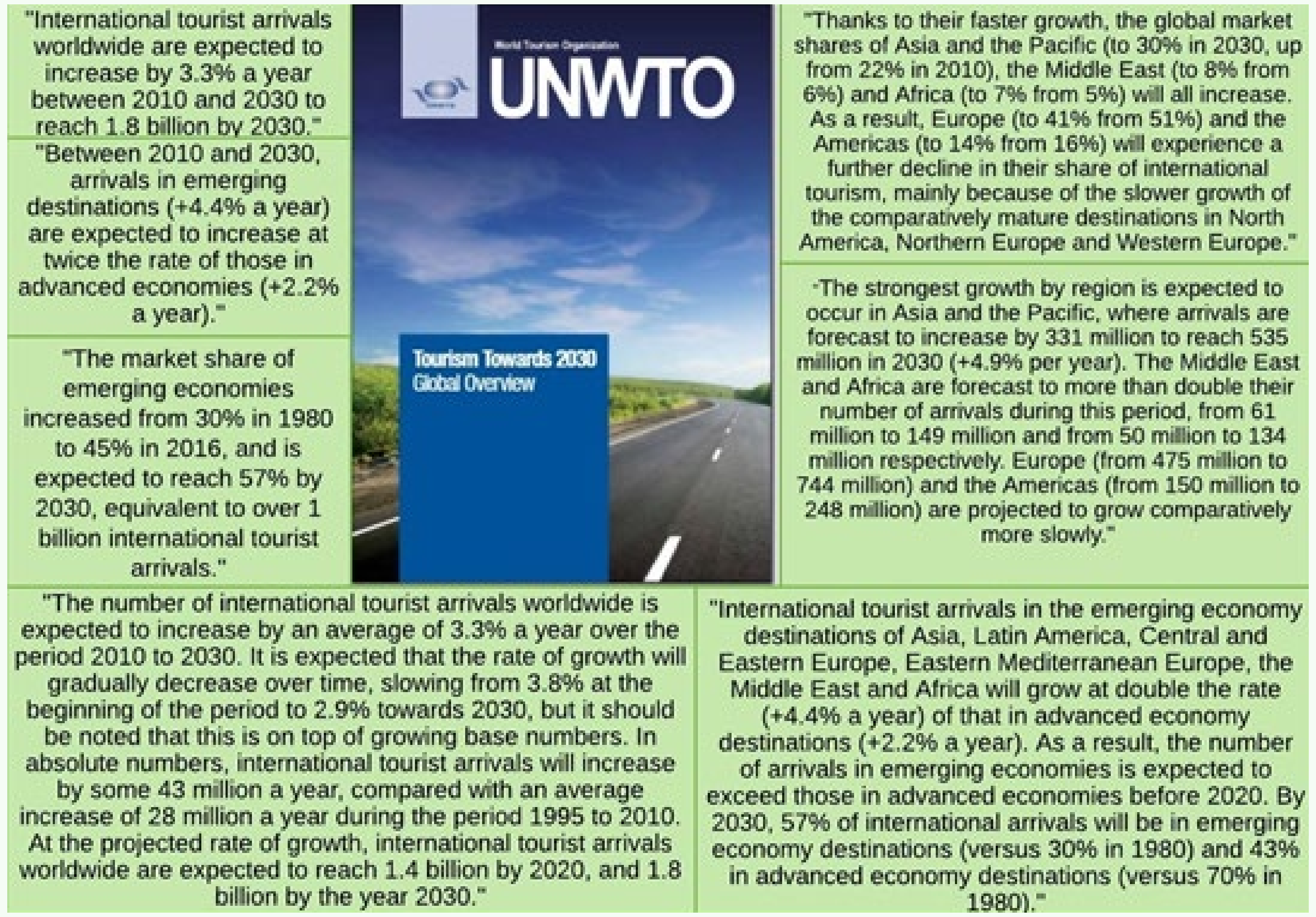
› Arrivals in emerging destinations were expected to double in rate compared with those in advanced economies. International tourist arrivals specifically for emerging destinations were also expected to exceed those in advance economies before 2020.

› The market share of emerging economies was expected to reach 57% by 2030.

› The growth in international tourist arrivals worldwide was projected to increase; starting with an additional 3.8% in 2010, then gradually decreasing over time each year, cumulating with an estimated growth of 2.9% by 2030.

› The strongest growth by region was expected to happen in Asia and the Pacific, with an increase of 331 million of arrivals for this area (+4.9% per year) and a global market share of 30% by 2030

Figure 16.- Highlights of the Central Scenario of the “Tourism Towards 2030/ Global Overview” publication by the UNWTO



Drafted by authors from Highlights of the “Tourism Towards 2030/ Global Overview” publication by the UNWTO, 2011

It is important to note that the above projections could have changed if any of the following three scenarios had occurred (all of which were assumed to be possible):

› **Scenario 1:** “slower recovery than expected from the 2008-2009 crisis in the short term, resulting on a lower growth of the global GDP in a medium term”, in which case the growth rate for international arrivals was calculated to be 2.0% average per year (reaching 1.4 billion in 2030, having approximately 22% less than in the central scenario).

› **Scenario 2:** “if the transport cost increases at a faster rate considering the central projections”. With a 1% increase of costs in transport, a 0.6% of international tourist arrivals would have decreased (reaching an annual growth rate of 2.9%, representing 1.66 billion international visitors by 2030, 8% less than in the central scenario).

› **Scenario 3:** “if transport costs continue their decline at a similar rate as it has occurred in the past 20 years”. With a 0.9% rate of decrease in transport costs, international tourist arrivals could have potentially increased to reach 2.0 billion by 2030 (at an average yearly rate of 3.9%, approximately 11% more than in central scenario).

(World Tourism Organization , 2011)

According to the UNWTO publication, the cost of transport has a more limited impact on the number of international arrivals than the economic growth. Nonetheless, an alteration in transport cost would have had a direct impact on the characteristics of the trip (distance traveled, length of stay, destination choice and mode of transport). Transport cost is not the main determining factor in whether a person will travel or not, but it does have an influence on the destination chosen and method used for transportation (e.g. - an accelerated raise of transport cost would motivate the traveler to stay closer to home, therefore decreasing long-distance traveling; while a further decrease or even a slower raise would cause the opposite effect).

»»» *Forecasting the tourism industry post-COVID19*

As the COVID-19 pandemic was unexpected and altered everyday livelihood worldwide, the tourism and travel industry greatly suffered, especially when a majority of countries went into lockdown and 100% of global destinations put travel restrictions in place. It is important to mention that as of April 20th, 2020, out of all 215 destinations, 45% had totally or

partially closed their borders for tourists, 30% suspended totally or partially international flights and 18% were still implementing the closing of borders in a more differentiated manner, by banning the entry of passengers from specific countries of origin. All in all, 2020 has been the first year in over a decade where the tourism sector has not presented a sustained growth from previous years, and this situation is considered by far the worst crisis that international tourism has faced since records began in 1950.

Initially, on March 26th 2020, the UNWTO expected a fall between 20-30% in tourism worldwide compared to the previous year (calculating a decline on international tourism receipts between $300-450 billion USD, representing the growth of five to seven years lost due to COVID-19). They also showed that in comparison to the global economic crisis of 2008-2009, worldwide international tourist arrivals had declined by 4%; already significantly more than what was seen with the SARS outbreak, which led to a decline of just 0.4% in 2003.

Figure 17.- International tourist arrival changes as of the first quarter of 2020

Drafted by authors from UNWTO World Tourism Barometer May 2020 Special focus on the Impact of COVID-19

On May 7th, 2020, the UNWTO reported a possible fall in international arrivals from 60-80% in 2020; having had a decline of 22% in the first quarter of the year, with 67 million fewer international tourists (a total 57% compared to 2019). Until March, it was estimated that $80 billion USD had been lost in. Asia and the Pacific showed the highest impact in relative and absolute terms (-33 million arrivals), while Europe lost 22 million international arrivals.

The UNWTO outlined three possible scenarios for the future (keeping in mind that it is uncertain the way the pandemic will unfold). These assumption scenarios highlight possible declines in arrivals from 58%-78% for the year; considering the speed of containment, duration of travel restrictions and shutdown of borders. In this instance, three possible dates for the gradual opening of international borders have been taken into consideration.

Table 2.- Assumption Scenarios for the Tourism Industry 2020

Scenario 1	"(-58%) based on the gradual opening of international borders and easing of travel restrictions in early July".
Scenario 2	"(-70%) based on the gradual opening of international borders and easing of travel restrictions in early September".
Scenario 3	"(-78%) based on the gradual opening of international borders and easing of travel restrictions only in early December".
Impacts of the loss of demand in international travel	"Loss of 850 million to 1.1 billion international tourists".
	"Loss of US$910 billion to US$1.2 trillion in export revenues from tourism".
	"100 to 120 million direct tourism jobs at risk (with more than half being women)".

Drafted by authors from UNWTO World Tourism Barometer May 2020
Special focus on the Impact of COVID-19

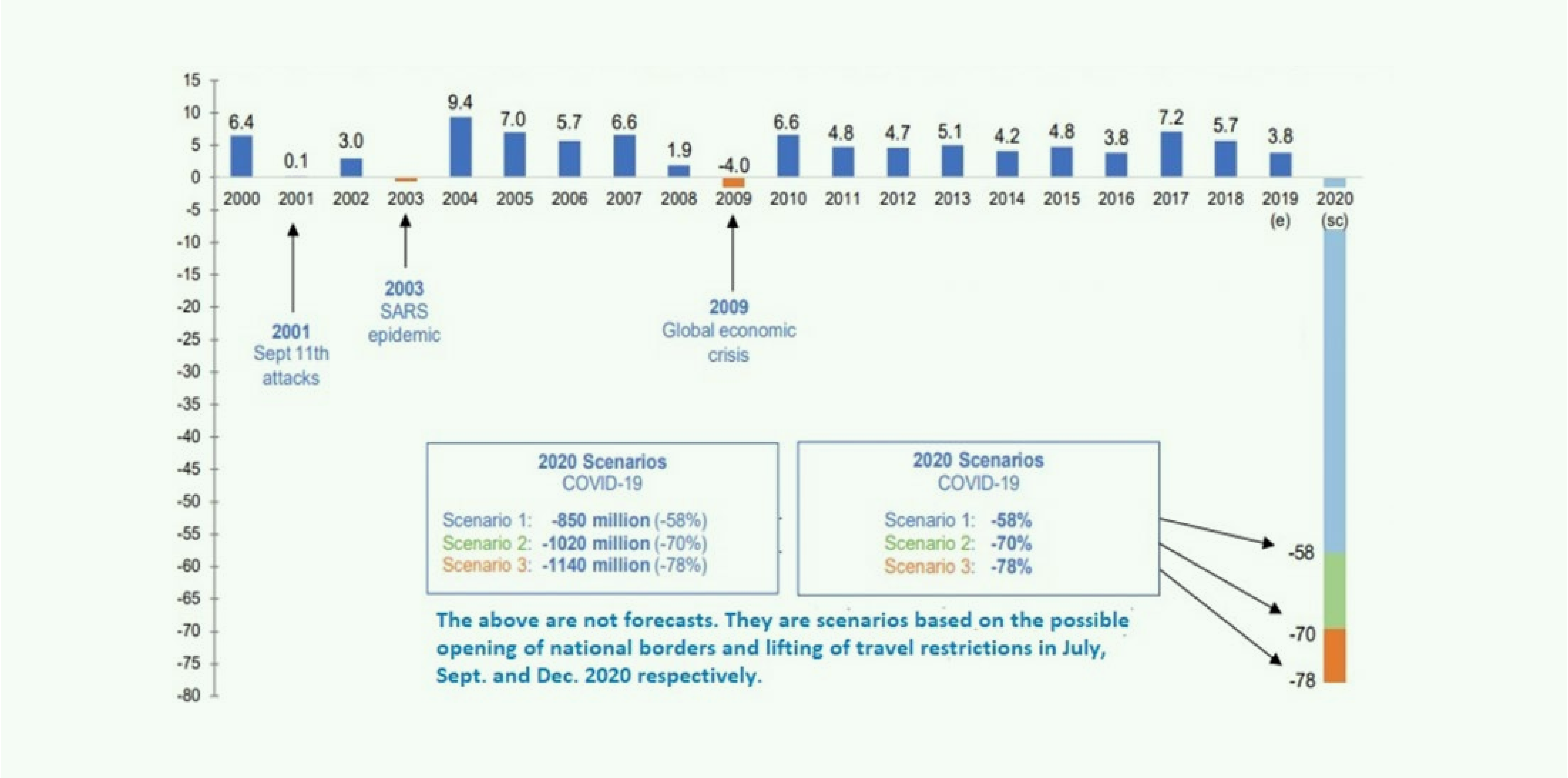
The following chart takes into consideration the different scenarios for the recovery of tourism, in addition to other significant events that have altered the travel industry over the years. For the 2003 SARS epidemic, the recovery time of lost arrivals in Asia took 14 months. In the case of the recovery period for Europe in the global economic crisis 2008-2009, it happened after 29 months, while the longest recovery period from previous impacts took 42 months for the Americas region to restore numbers after the 9/11 attacks.

As far as an expected recovery date for the industry, survey results from global UNWTO Panel Experts point to 2021 for international demand. Domestic demand is expected to have a faster recovery than international demand. Additionally, if previous crises are of any indicator, leisure travel (visiting friends and family specifically) is expected to have the fastest rehabilitation. However, the recovery period will also depend on various challenges that still remain unknown (duration of the pandemic, travel restrictions, global economic recession), as well as the effect of the wide range of measures to mitigate the impact of the COVID-19 pandemic and to stimulate the recovery of the sector.

Considering the opinion of the UNWTO Panel of Experts, Africa and the Middle East are the regions expected to foresee the most recovery in 2020. On the other hand, the Americas are the least likely to see recovery in 2020. Additionally, it is believed that domestic tourism will reach its highest demand in the third quarter of 2020 (from July to September), with a 45% recovery rate due to people traveling locally. By the last quarter, international tourism will have surpassed the domestic one (25% vs. 34%). Finally, by the year 2021 the panel of experts foresaw a great increase in the recovery of international travel and a doubling in the demand for domestic travels (15% vs 35%).

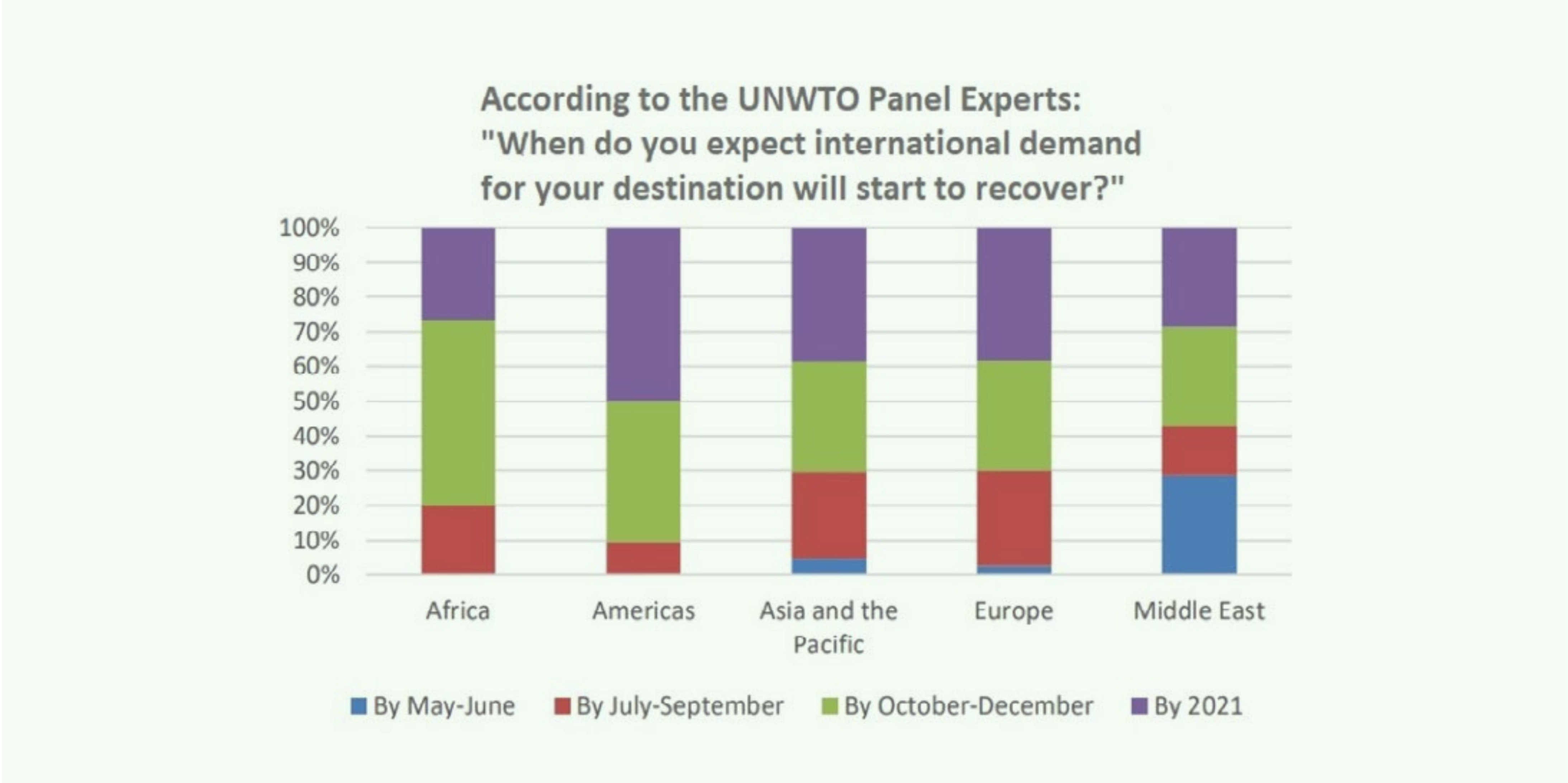
The tourism industry, like many other sectors, depends on a stable global economy and

Figure 18.- International Tourist Arrivals 2000-2019 and Scenarios for 2020



Source: from UNWTO World Tourism Barometer May 2020 Special focus on the Impact of COVID-19

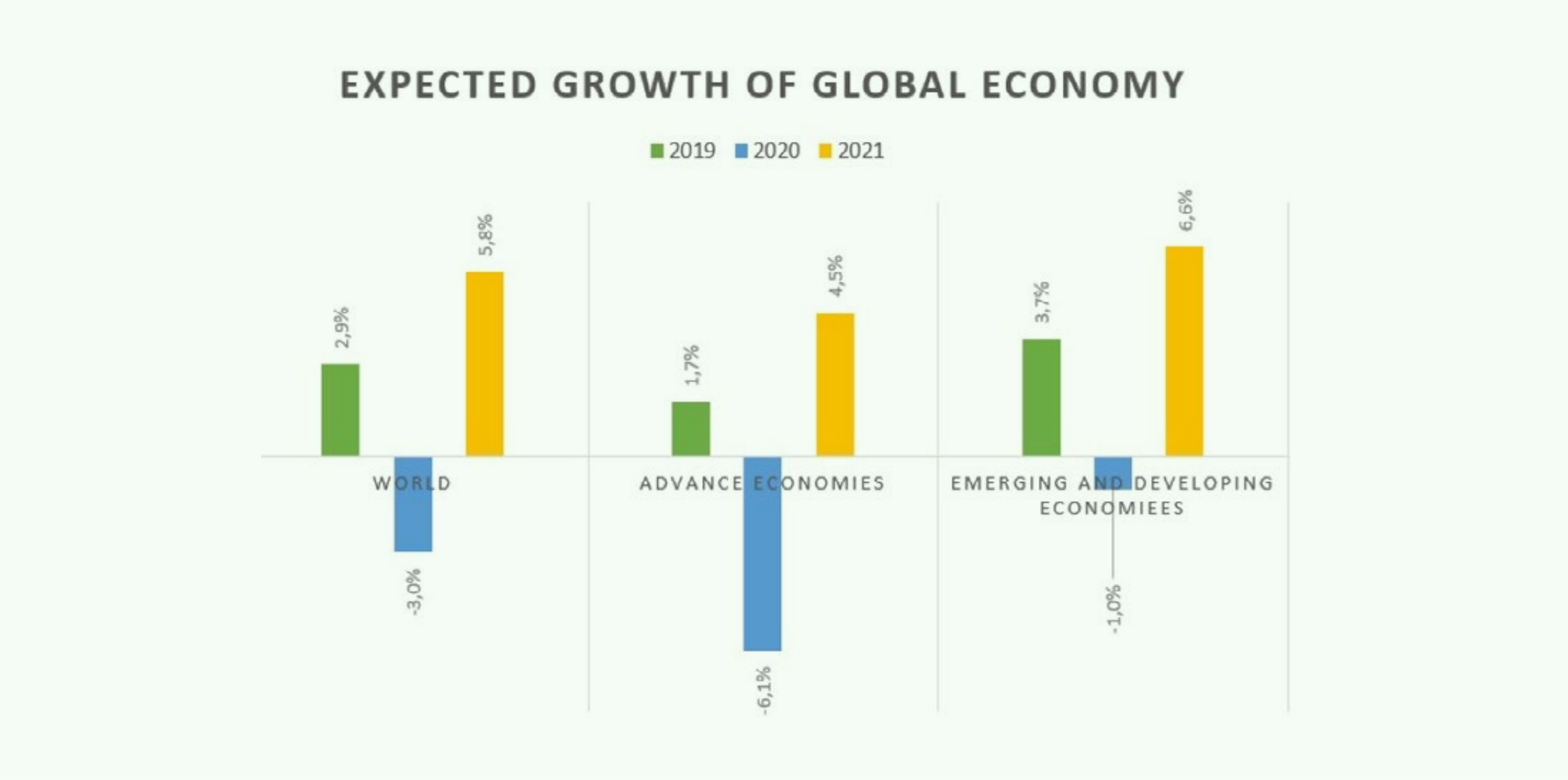
Figure 19.- UNWTO Panel Experts' Recovery Results by Region



Source: from UNWTO World Tourism Barometer May 2020 Special focus on the Impact of COVID-19 purchasing power plays an essential role in the recovery of the sector after pandemic. The International Monetary Fund (IMF) expects that the global economy will pick up by 5.8% by 2021, as the economic activity normalizes (contrasted to -3% from 2020). As seen on the following figure, the emerging and developing economies have a higher expectance of GDP growth in 2021 in comparison to the advance economies (4.5% vs 6.6%); in addition, the latter have a higher decline of -6% in 2020, while the emerging economies will decrease by only -1%.

Furthermore, is important to mention that commodity and crude oil prices dropped by 65% (a fall of approximately USD $40 a barrel), while the world merchandise trade is set to decrease between 13% and 32% in 2020 as a result of the COVID-19 pandemic, ultimately influencing the length of the recovery for the tourism industry.

Figure 20.- Global Economy Growth Expectance



Drafted by authors from UNWTO World Tourism Barometer May 2020 Special focus on the Impact of COVID-19, 2020 & International Monetary Fund, 2020

Eyes on: the aviation sector

› "The slump in air traffic has further caused severe financial pressure on all stakeholders in the aviation sector. Only in March, airlines are estimated to lose USD 28 billion in revenues, and airports and air navigation service providers have lost around USD 8 billion and USD 824 million, respectively. Aviation stimulates global economies through employment, trade and tourism. It also plays an instrumental role as a worldwide enabler in times of crisis, through its vast network and connectivity, vital air cargo services and support of supply chains"- How COVID-19 is changing the world: a statistical perspective, Committee for the Coordination of Statistical Activities.

(ICAO Air Transport Statistics, ADS-B,FlightAware & ICAO Economic Impact Analysis of COVID-19 on Aviation), Date (May, 15, 2020).

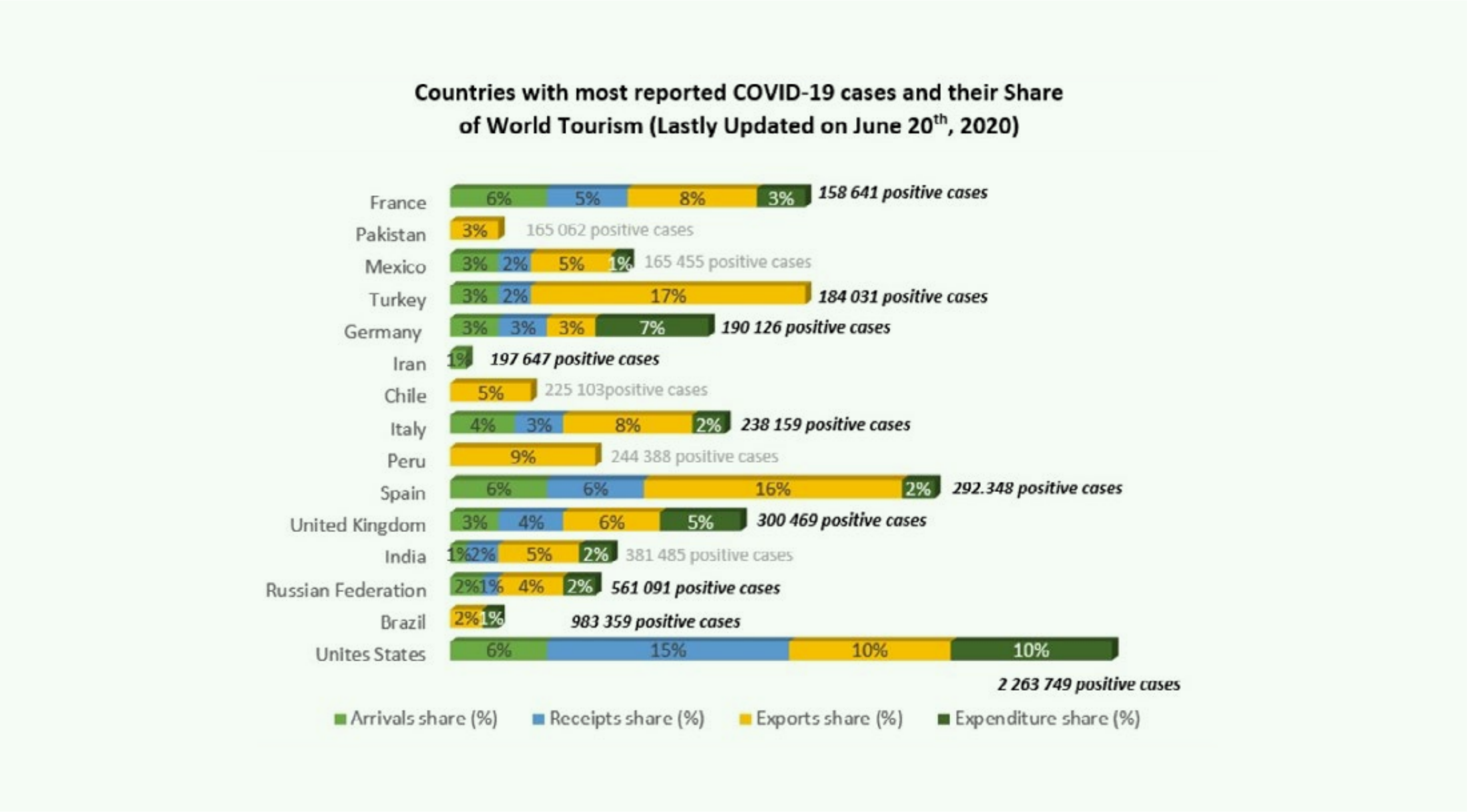
Without a doubt, the tourism sector has transformed on a global scale. Nevertheless, each country has to work depending on its specific case in order to create strategies, manage the future for the destination and ensure traveler safety throughout their entire journey. As of June 19th, 2020, a total of 8,586,115 positive cases had been reported worldwide. Countries in which the most cases have occurred are most likely to have a slower recovery time than destinations where fewer cases have emerged. Likewise, destinations with a high domestic share are less exposed than the ones that have a higher share for international visitors (such as Australia, Indonesia, Peru, Ukraine, Ecuador, Cameroon and Japan, to name a few).

Therefore, it is no surprise that the nations with the highest numbers of infected people have the most affected tourism sectors. Altogether, as of May 2nd, these account for 54% of the share of world tourism expenditure, 39% of the share of world tourist arrivals and 42% of the share of world tourism receipts (this data is made up of 12 different countries, including 10 of the top 15 countries with the most reported COVID-19 cases).

Canada and China currently do not rank in the top 15 countries with the highest number of COVID-19 cases (18th and 21st respectively); however, they are included in the most affected countries for the tourism industry (and considered to be in the average share of the world tourism expenditure, tourist arrivals and tourism receipts). The remaining 10 destinations are highlighted in the following graphic with their individual shares in the tourism industry.

As seen in the graphic below, the countries most affected by the COVID-19 pandemic are also the ones where the tourism sector has had a very significant share of the global industry, and they often have played an important part in global economics. Several actions and strategies have to be implemented in order to recover the affluence of visitors, ensuring their safety and to position themselves again as powerful destinations for

Figure 21.- Top 15 Countries with the Most Reported COVID-19 Cases and their Share of World Tourism



Drafted by authors from STATISTA, 2020 & UNWTO Tourism Dashboard 2020 (INTERNATIONAL TOURISM AND COVID-19), 2020

the tourism sector. On the other hand, with these relevant countries of the industry being greatly affected, this can also be seen as a new opportunity for less known destinations where fewer cases of COVID-19 are reported and the activity of tourism is yet not positioned to emerge.

»»» *Tourist behaviors and the "New Traveling" tendencies post COVID-19*

Tourism has been one of the sectors most affected by the health and economic crisis caused by the COVID-19 pandemic, with several repercussions that have presented on a worldwide scale. With the majority of the global population having gone into mandatory confinement, air traffic has been reduced by 90%; and tourist attractions, hotels and restaurants have either gone out of business or closed for lengthy stretches of time across the world. It is safe to say that this pandemic has been and continues to be a catastrophe for a sector that relies heavily on mobility and social contact; one that has previously managed to move more than 1.5 billion tourists a year, with a constant growth above other sectors in the global economy, that has accounted for more than 10% of world Gross Domestic Product and employed over 300 million people (directly and indirectly).

Beyond the massive reservation cancellations for the most recent and upcoming months, and, with the risk situation for the entire summer season of the northern hemisphere (vital for many destinations around the world), the COVID-19 pandemic will have an overall profound impact on the way in which people travel and how they relate and behave within the near future (García, 2020).

The main issue for the growth and recovery of the tourism sector will be the health and safety uncertainties that people will perceive until they can be rest assured that a more effective treatment or vaccine against the virus is created and implemented throughout the population.

The tourism industry will most likely be a sector that experiences some of the most difficulty in recovering due to the following reasons:

› Mobility limitations - as a result of flight restrictions, entry bans and the closing of borders in the majority of countries; additionally, the fear of sanitary controls or protocols when arriving at an airport can be daunting for passengers, especially when aware that they may be required to self-quarantine for up to two weeks.

› The fear and mistrust that has been generated associated to social distancing, making potential travelers scared to be surrounded by people.

› The economic recession that will result in people having limited resources for travel and, in some cases, not being able to afford this commodity at all.

› The pandemic has generated great difficulties for many companies – some struggling to survive, while others will have to disappear or change their business model completely if they want to endure.

On top of this, the pandemic is likely to create a psychological effect that will result in travelers preferring to either stick to nearby destinations or countries where the outbreak has not had a large impact (ultimately boosting domestic and regional travel) within the first year (García, 2020).

The following changes can be expected for the future of tourism after COVID-19:

› Greater sanitary measures at airports, train and bus stations and other forms of public-accessible transit.

› Health and biosecurity measures applied in museums, at monuments and within other tourist attractions and establishments.

› Reduction of the number of people who can access places of great tourist affluence and public transport.

› Additional cleaning measures in hotels and other accommodation options (resulting in higher rotation).

› Increased and standardized protocols for the logistics of meetings and events.

› Increased demand for travel insurance to cover possible pandemics.

› Social distance as a new and constant method for ensuring the well-being of travelers.

› The mandatory usage of a facemask or face-shield at all times when traveling on a plane, and possibly in other touristic locations.

»»» *The global recovery phases*

The recovery of the tourism sector will be gradual and may not return to a commonly known "normal situation" until 2021. This set recovery is divided in two phases: firstly, the domestic tourism phase, which boosts local economies and makes mass transportation systems unnecessary and, later in time, the second phase of international displacement (Deloitte, 2020).

In the near future, more immigration restrictions and sanitary entry controls will be seen. Furthermore, once a vaccine has been discovered, some countries may require immunization certificates for the virus or may implement a mandatory vaccination in order for travelers to be granted entrance to a territory (Deloitte, 2020).

In the first stage of recovery, the following can be expected:

› Holidays will prevail in rural settings especially in places where fewer crowds are expected (natural areas).

› The rental of tourist houses or apartments will have a preference over hotels.

› Private transport will prevail over public transport (alternative transport methods may be encouraged).

Sectors like business travel and natural tourism (in small groups) will recover earlier, while others such as cruises, organized groups and travel for the elderly are estimated to take longer. Moreover, the increasing demand for boutique and smaller accommodation options will escalate most likely in rural settings, away from large cities and populated centers.

»»» *Domestic trips*

Due to the fear of traveling with the present health risk, the first trips to be made will be domestic (with connectivity logistics playing an important part). Whilst security freedoms are returned to the population and travel regulations are lifted, the most likely or only options for those who want to travel will be to visit nearby communities or destinations within their country or same region.

For economic reasons, a rise in on the road travel will be seen after COVID-19, both in private cars and via ground transportation. Furthermore, the growing trend of sustainable travel will return more empowered than ever. Awareness about supporting local communities and reducing the ecological footprint caused by travel will be an important issue.

»»» *Air transport*

The recovery of the aviation sector will be gradual. A study published by the Official Aviation Guide of the Airways (OAG) mentions that tourists will seek more direct flights or routes in order to avoid crossing multiple borders, therefore, having to deal with many people and vigorous controls. Additionally, the migration filters will be sharper, along with safety protocols and sanitary inspections that should be carried out on each passenger. Although in many airports some of these measures have already been implemented, such as temperature checks, they will become increasingly common and mandatory.

»»» *Cruise ships*

The cruise industry, being one of the most affected by the COVID-19 pandemic, will have to apply even more and more visible sanitary rules and protocols in the cleaning of facilities and entry and exit points for passengers. In the course of 2020, many cruise lines have already canceled their remaining trips for the entire year. Moreover, the decline in reservations and postponed travel plans will make 2021 a year of rebound for the industry, according to Rudi Schreiner, founder of the European cruise company “AmaWaterways”.

Cruises will have to apply new rules to contain contagious illnesses on board, on top of those they currently adhere to for diseases such as norovirus. Additionally, it will be necessary to reinforce their medical teams’ knowledge of coronavirus procedures and to ensure there are safe, integrated spaces for the containment of sick people on every ship. With these recommendations in mind, they will also have to reach new agreements and protocols with their landing ports in the case of a passenger contracting a contagious disease (McCarthy, 2020).

»»» *Behavior of tourists after COVID-19*

As a result of the confinement that the world’s population is currently suffering, many people will be compelled to rethink their social relationships, the way they work (betting on telework) and how they plan their future trips. People who travel will change their behavior patterns after the COVID-19 pandemic in ways such as:

›The demand for less crowded and more sustainable destinations will grow.

›Tourism products with greater flexibility for change and cancellations will be required.

›Tourists will be more lenient with tourism providers on hygiene and sustainability issues.

›Some people will avoid traveling if they present common cold or flu symptoms in order to avoid unnecessary attention that may arise from other tourists traveling with them.

›There will be a greater demand for hygiene measures and biosecurity (both in facilities and with employees).

›Travelers will become more concerned about health security in both tourist facilities and the food and beverage industry.

›Tourists will be more aware of things such as the air filters that the airlines use, therefore, air quality will be a key marketing element.

›New methods of checking-in will be demanded for airlines and hotels where minimum human contact is necessary (such as mobile channels and technological platforms).

›Technology implementation and innovation will be more demanded in order to ensure the travelers safety throughout the entire journey (like apps, biosafety, new business models, etc.).

›There will be a higher demand for better travel insurance packages that cover pandemics.

›The preferred method for eating will be at home or in the room (if a person is staying at a hotel), instead of going to a restaurant, to avoid physical contact with other people.

> There will be an increased demand for food that can be delivered or that can be picked up to go rather than eating at a sit in restaurant (new opportunities for delivery platforms).

> The demand for adventure activities in nature and in outdoor spaces will grow.

> Accommodation options will be sought with the availability of computers, printers and internet accessibility in mind, in order to merge vacations with work.

> In organized groups and activities, fewer people per group will be allowed (resulting in a more personalized experience at a higher price).

»»» *Conclusion*

All in all, the tourism industry has gone through several changes, phenomena, crises, health-related issues and more. However, as history has shown, it will continue to be relevant as the sector occupies an important role in societies and global economies (often considered a tool for development in many countries). It will be the duty of tourists to be able to adapt to new traveling paradigms that will be presented in the coming future; and the obligation of companies and organizations to adapt to new ways of thought and procedures in order to bring the industry back to its former peak.

03

The survey

Diana Garcia Trujillo

The COVID-19 pandemic has brought tourism into a drastically static stage; seen at its worst when worldwide borders closed, travel was banned, businesses shut down and travelers were confined. As the emergency has not yet finished, there is uncertainty about the solutions and measures the industry will need to take to recover, however efforts from different levels are being made to bring back the industry to life. In an effort to determine the future of tourism, a survey was conducted as a part of this study, by investigating how this global pandemic has influenced travelers' choices and preferences.

6.: For the purpose of this survey age groups will be classified within Generation Z (o to 23 y.o), Millennials (24 to 39 y.o.), Generation X (40 to 55 y.o.), Baby boomers (56 to 74 y.o.).

The results are presented in four sections:

1. » Sociodemographic profiles.
2. » Before the global pandemic.
3. » During the global pandemic.
4. » After the global pandemic: A look to the future.

The survey was conducted over 12 days in April of 2020; it was distributed through different social networks to the general public. A total of 687 respondents completed the survey, and the results were analyzed using Microsoft Excel.

It is important to mention that COVID-19 has not only affected tourism worldwide, but regions are also facing challenges on their own; therefore the results were analysed from both a global perspective as well as within a regional context for the areas that had the majority of responses (Europe, Latin America and North America). A note on socio-demographic variations was made when important considerations among regions and gender were found. In addition, since the millennials were the most representative generation in the survey, their results have been analyzed in a separate section.

We hope that the results provide useful and valuable information for organizations, professionals and destinations, and can help determine new trends, strategies and plan towards a more sustainable tourism industry.

»»» *Respondents' profile and results*

» Sociodemographic profiles

A total of **687 participants completed the survey.** The majority of them were from Europe (50.95%); followed by Latin America (37.12%) and North America (9.17%); with the remaining 2.77% from other regions (Fig. 22).

Out of these, **62.15% were female; 36.54% were male and 1.31% preferred not to answer.** In terms of age, the majority of participants would be classified as **Millennials (61.57%)**; followed by Generation X (22.56%); Generation Z (8.73%) and Baby boomers (7.13%)[6] . About 56.48% of participants were employed; 14.99% were self-employed and 10.19% were students; the remaining 18.34% had other occupations and classifications including entrepreneurs, unemployed and retired (Fig. 23).

Figure 22.- Survey Results: Continent of Origin

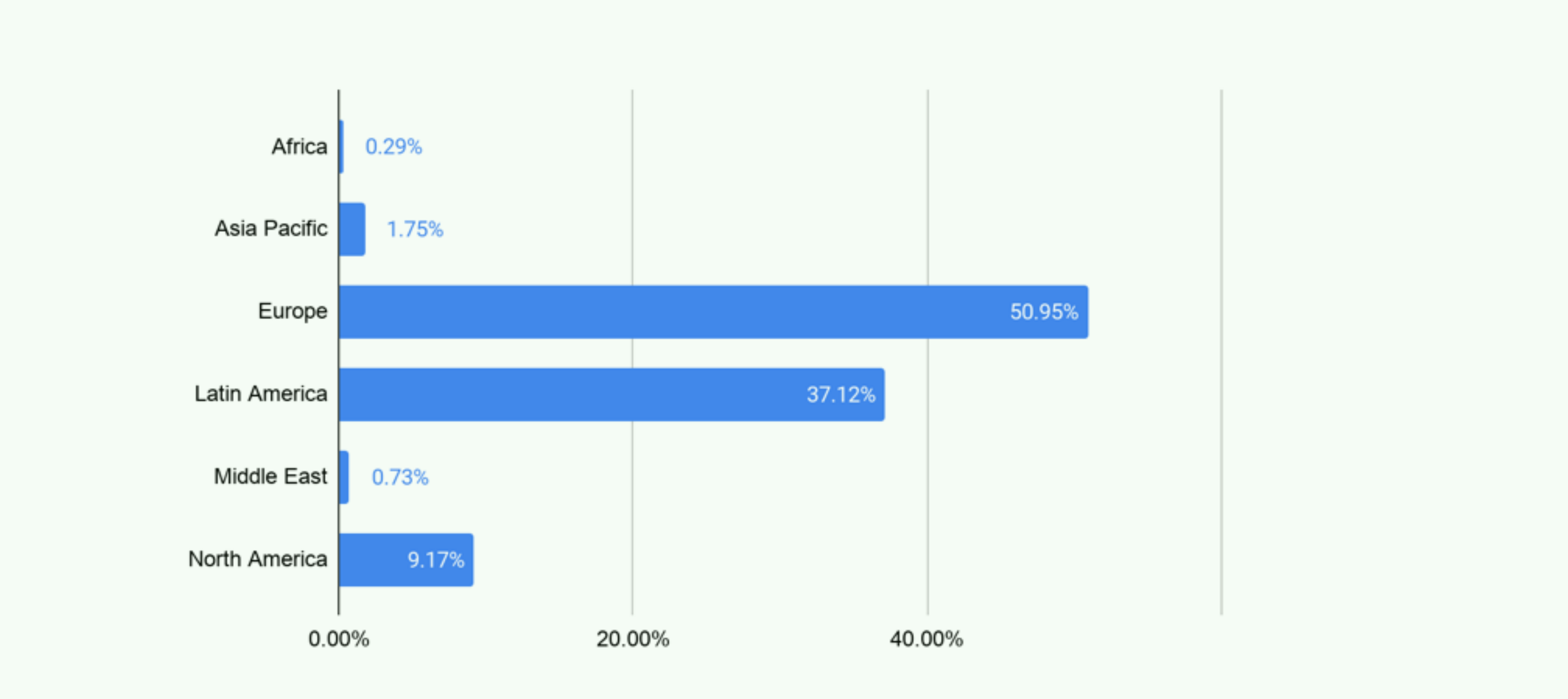
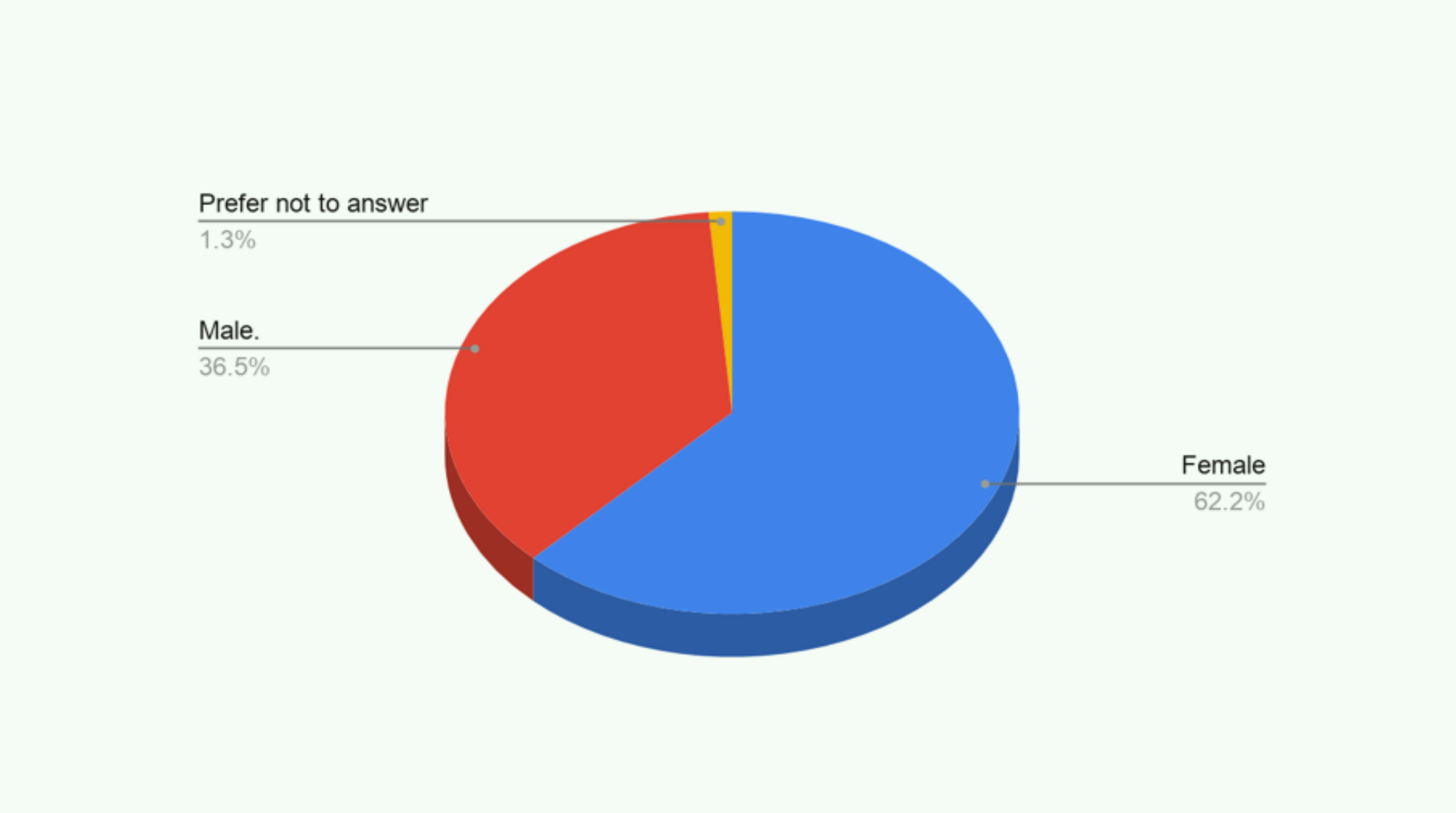


Figure generated by the author, through the platform Survey Sparrow

Figure 23.- Survey Results: Gender



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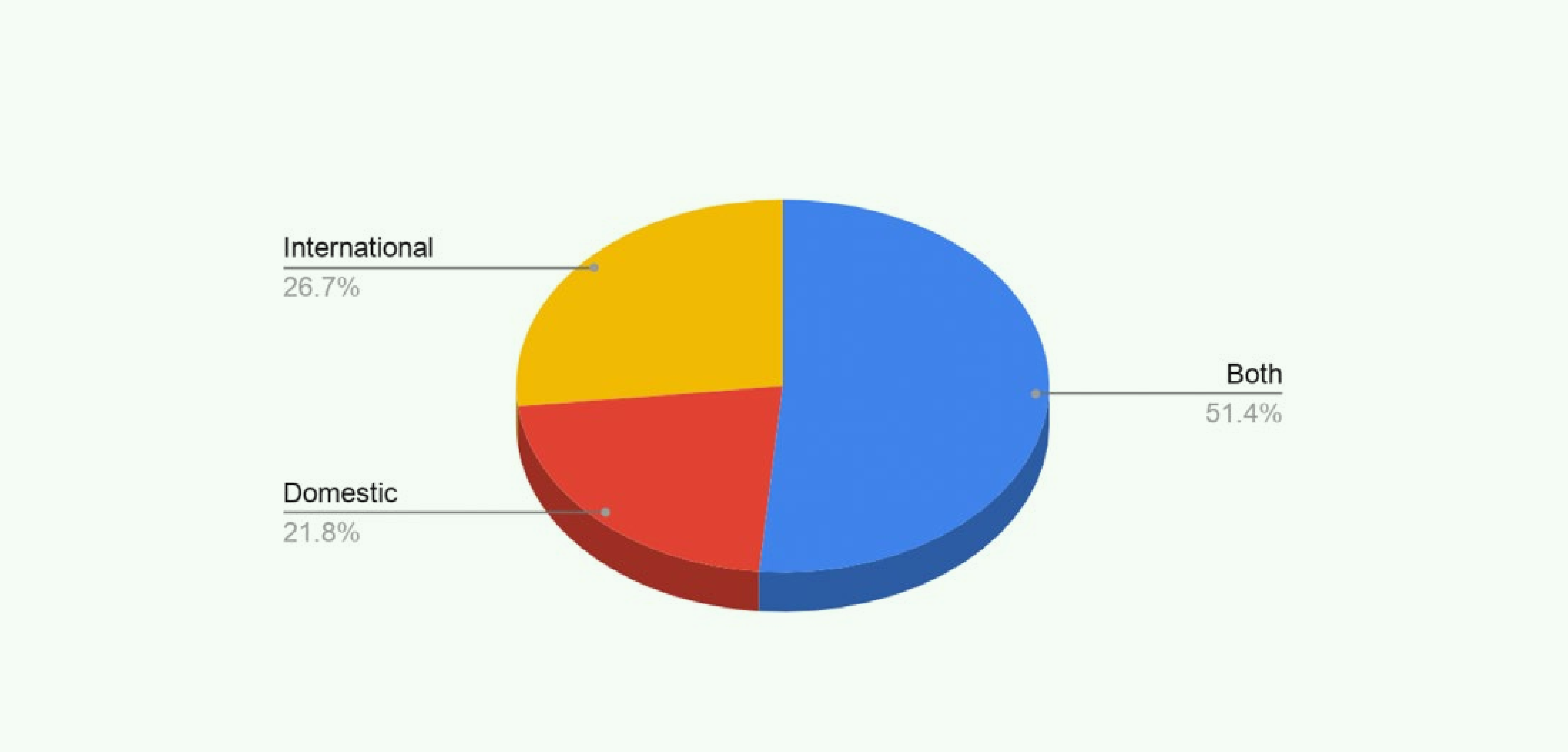
»»»» *Before the global pandemic*

» Travel planning

Before the global pandemic, **half of participants used to travel both within their home country and to foreign countries** (51.41%), and there was not a significant difference between those that travelled solely domestically or solely internationally (21.84% and 26.75% respectively) (Fig. 24).

Figure 24.- Survey Results: Travel Destination



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The majority used to organize their travel independently (84.10%); while just a small proportion used a travel agency (8.62%). Furthermore, **the largest number used to travel as a couple** (45.93%); followed by a slightly lower proportion with friends (40.99%) and with family (39.83%) (Fig. 25).

Figure 25.- Survey Results: Travel Companions

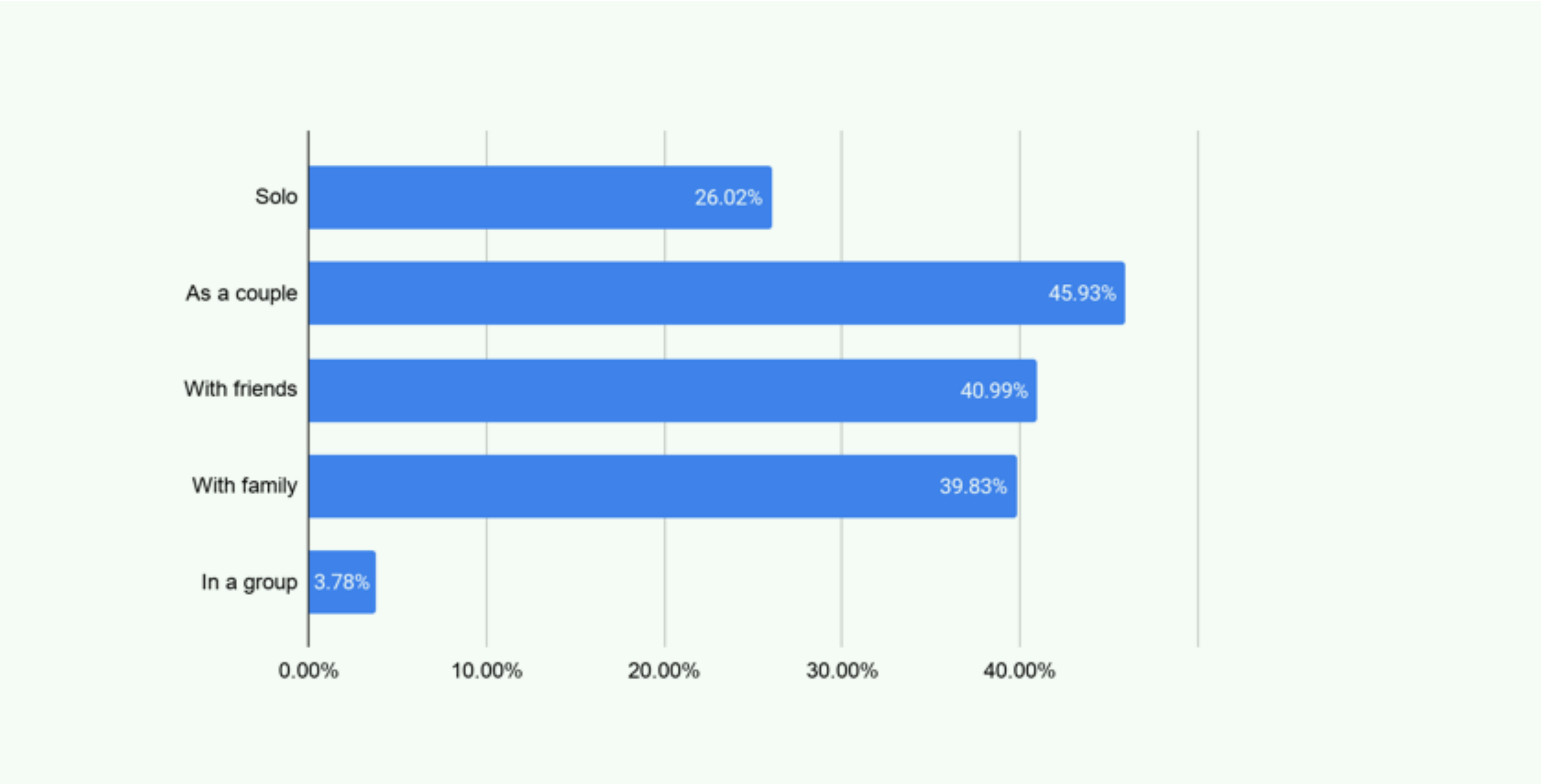

Figure generated by the author, through the platform Survey Sparrow

»› Sociodemographic variations

For the preferred destination type, there was not any notable difference between recipients' regions. In terms of gender, **women used to travel more than men** - particularly both within their own country and to foreign countries combined (53.94% vs 47.35%).

For travel arrangements, it was found that **the highest proportion of independent planning was done by those in North America** (93.65%), as compared to Europe and Latin America (86.69% and 80.24% respectively). In terms of gender, **women organized their trips more independently than men** (84.96% vs 82.04%).

For traveling companions there was a notable difference between regions. **Traveling with family was more popular in Latin America** (56.86%); whereas **traveling as a couple was more popular and quite equal in North America and Europe** (50.79% and 50.29% respectively) (Fig. 26).

Figure 26.- Travel Companions by Region

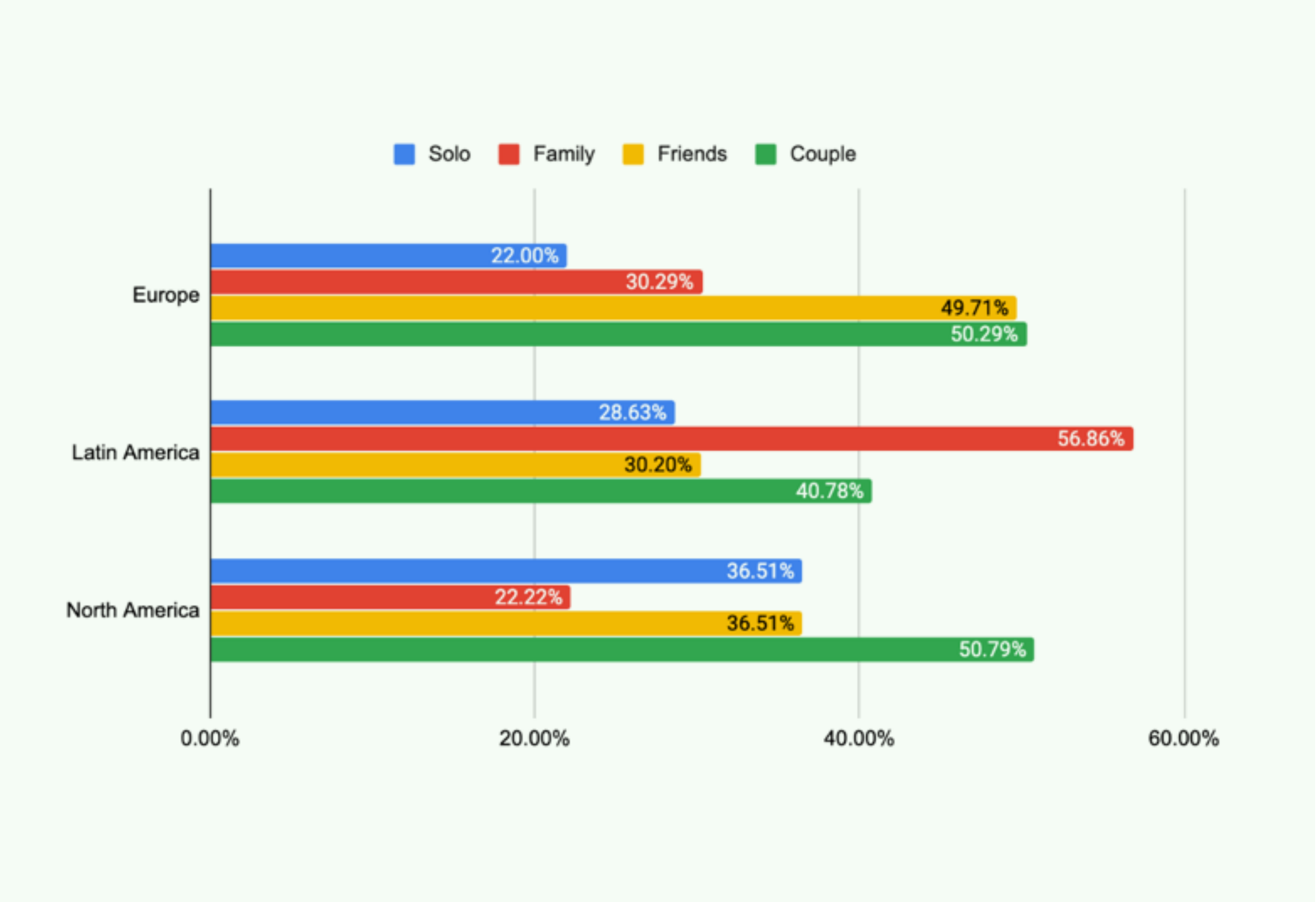

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Figure 27.- Survey Results: Travel Companions by Gender

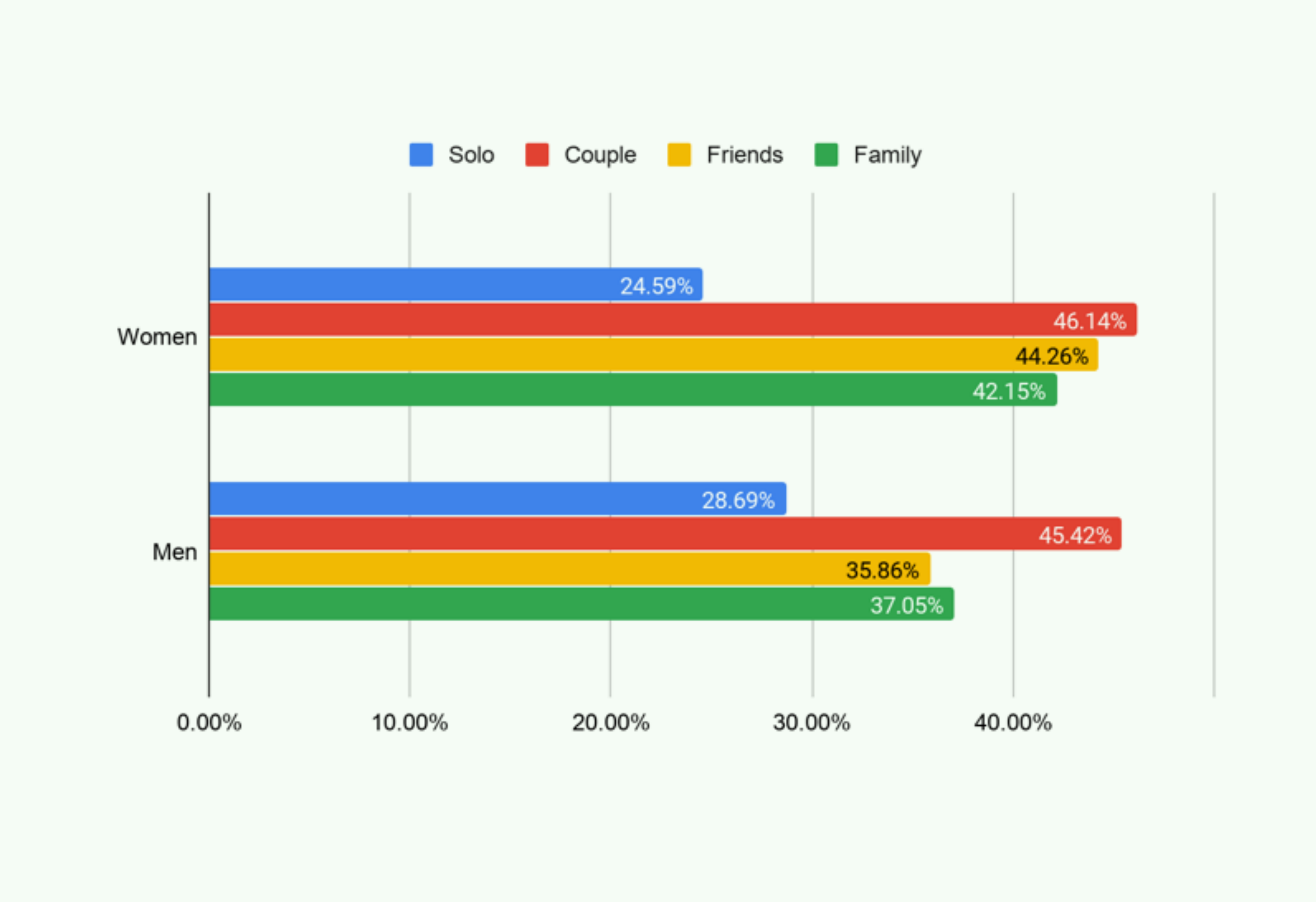

Figure generated by the author, through the platform Survey Sparrow

In terms of gender, **women used to travel more as a couple than men** (46.14% vs 45.42%) (Fig. 27).

»» Travel experience

Before the global pandemic, **planes were the most widely used mode of transport** (76.02%); followed by cars (54.07%); and continuing with lower percentages for trains and buses (25.73% and 19.48% respectively) (Fig. 28).

Figure 28.- Survey Results: Mode of Transport

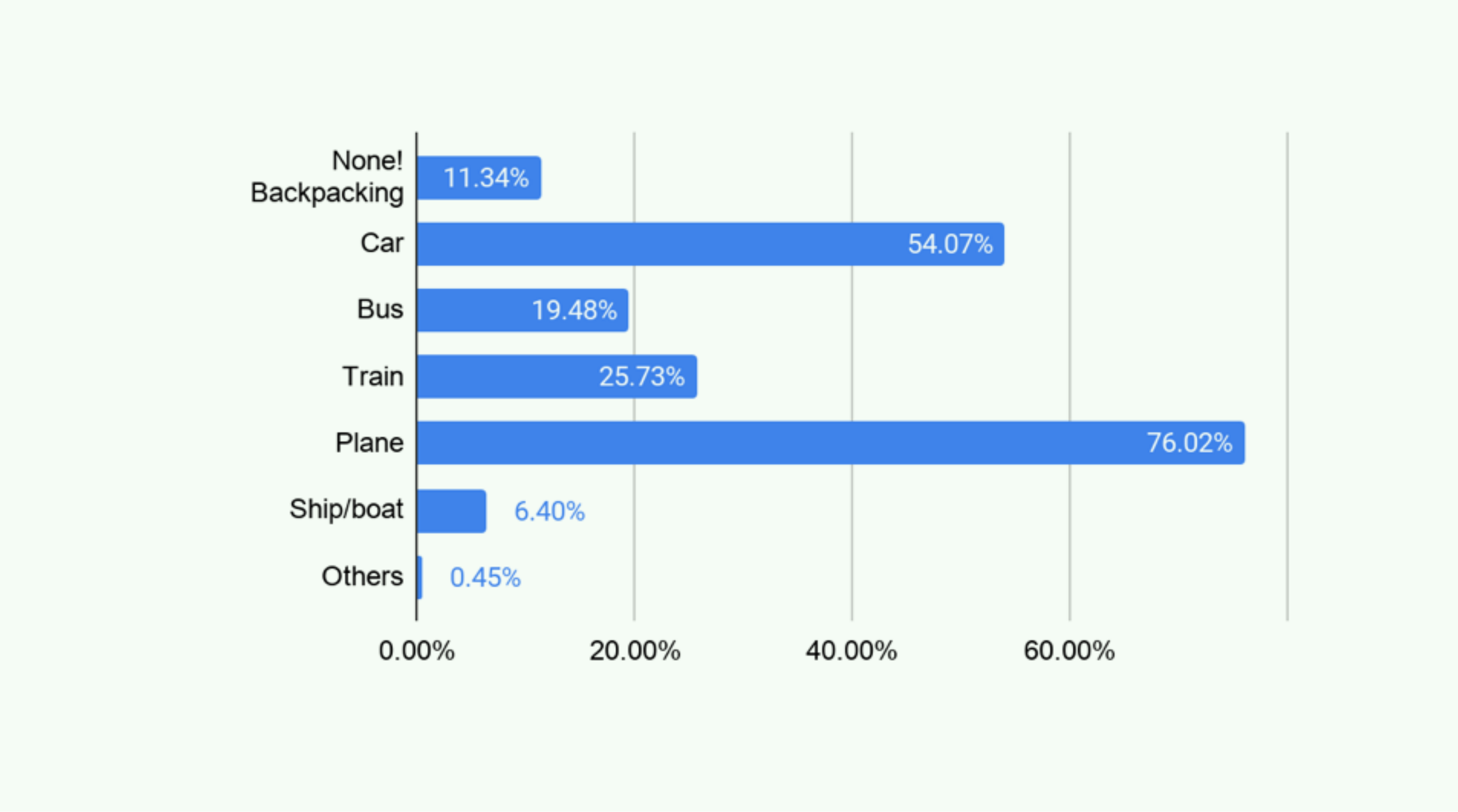

Figure generated by the author, through the platform Survey Sparrow

Almost an equal proportion of participants preferred to travel to big cities (40.84%) and natural areas (39.39%); whereas only 20.09% opted for towns and rural villages. In addition, **culture & history** (56.40%); **urban exploration** (51.45%) and **nature** (47.82%) were found among the **top interests when traveling** (Fig. 29).

Figure 29.- Survey Results: Top Travel Interests

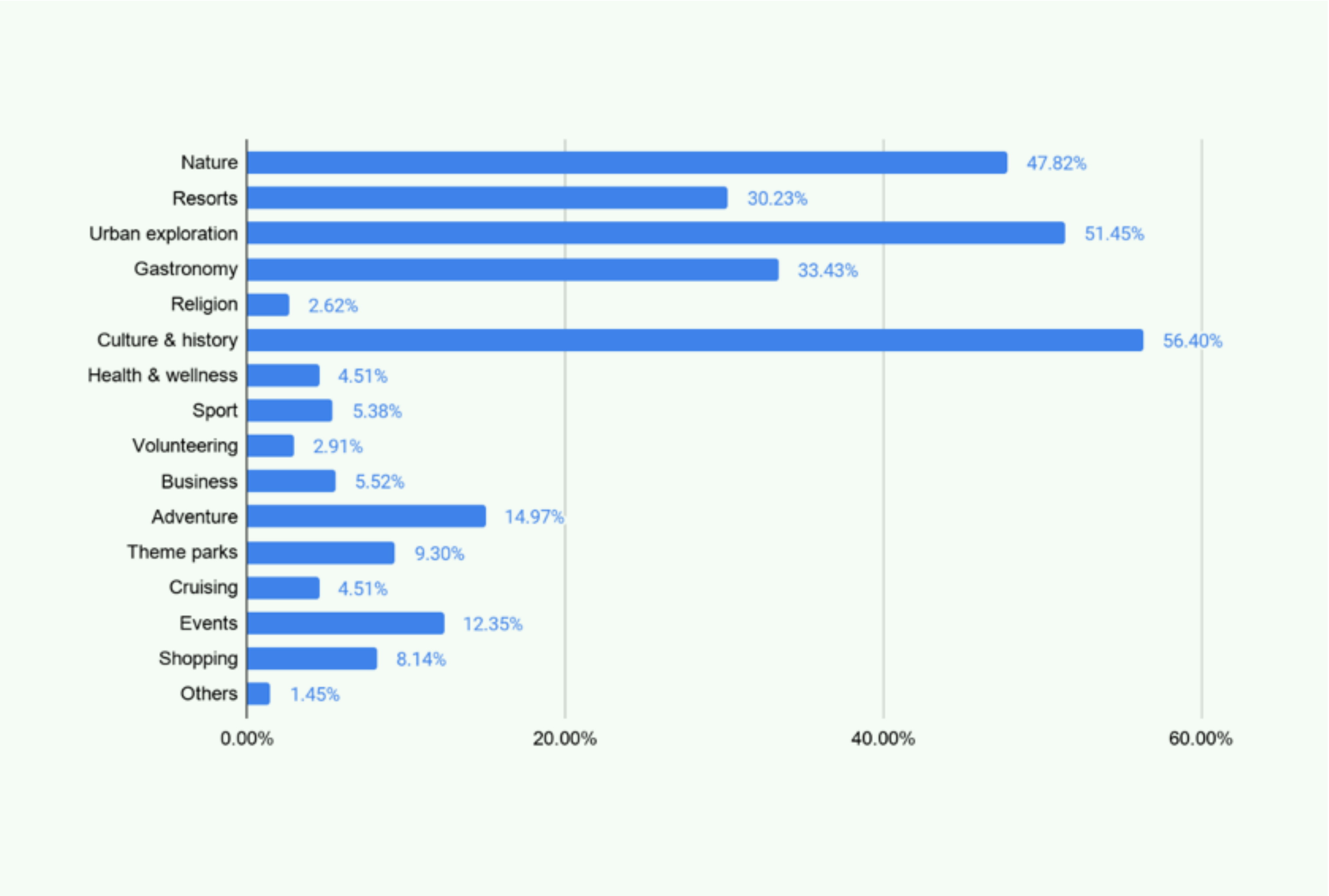

Figure generated by the author, through the platform Survey Sparrow

»» Sociodemographic variations

Although for all regions and genders planes were the most used transport, **North Americans used to travel more by plane** (93.65%), than Europeans and Latin Americans (74.86% and 72.55% respectively). In addition, **women and men used to travel almost equally by plane** (76.35% vs 76.10%)

For the preferred traveling environment, there was a notable difference between regions - **big cities were more appealing for Europeans** (46.57%); whereas **natural areas were for North Americans and Latin Americans** (58.73% and 49.41%) (Fig. 30).

Figure 30.- Survey Results: Travel Environment by Region

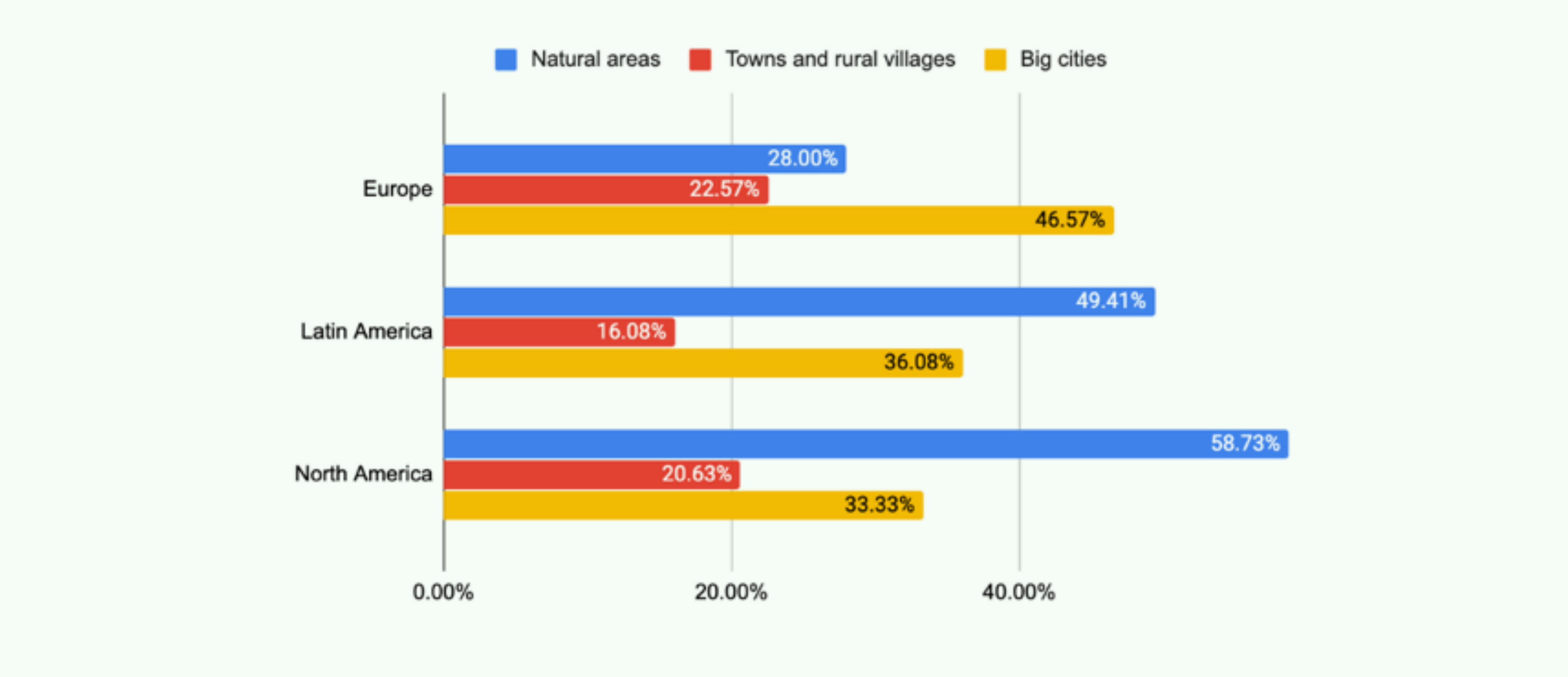

Figure generated by the author, through the platform Survey Sparrow

In terms of gender, women leaned more towards natural areas (40.98%); whereas men were drawn to big cities (46.61%) (Fig. 31).

Concerning the main interests when traveling, some variations were found between regions. **For North Americans and Latin Americans nature was at the top of their interests** (60.32% and 54.12% respectively); followed by culture & history (60.32% and 47.84% respectively) and urban exploration (47.62% and 41.57% respectively). **Whereas for Europeans, culture & history was their first choice** (63.14%); followed by urban exploration (59.14%) and nature (40.57%) (Fig. 32).

Figure 31.- Survey Results: Travel Environment by Gender

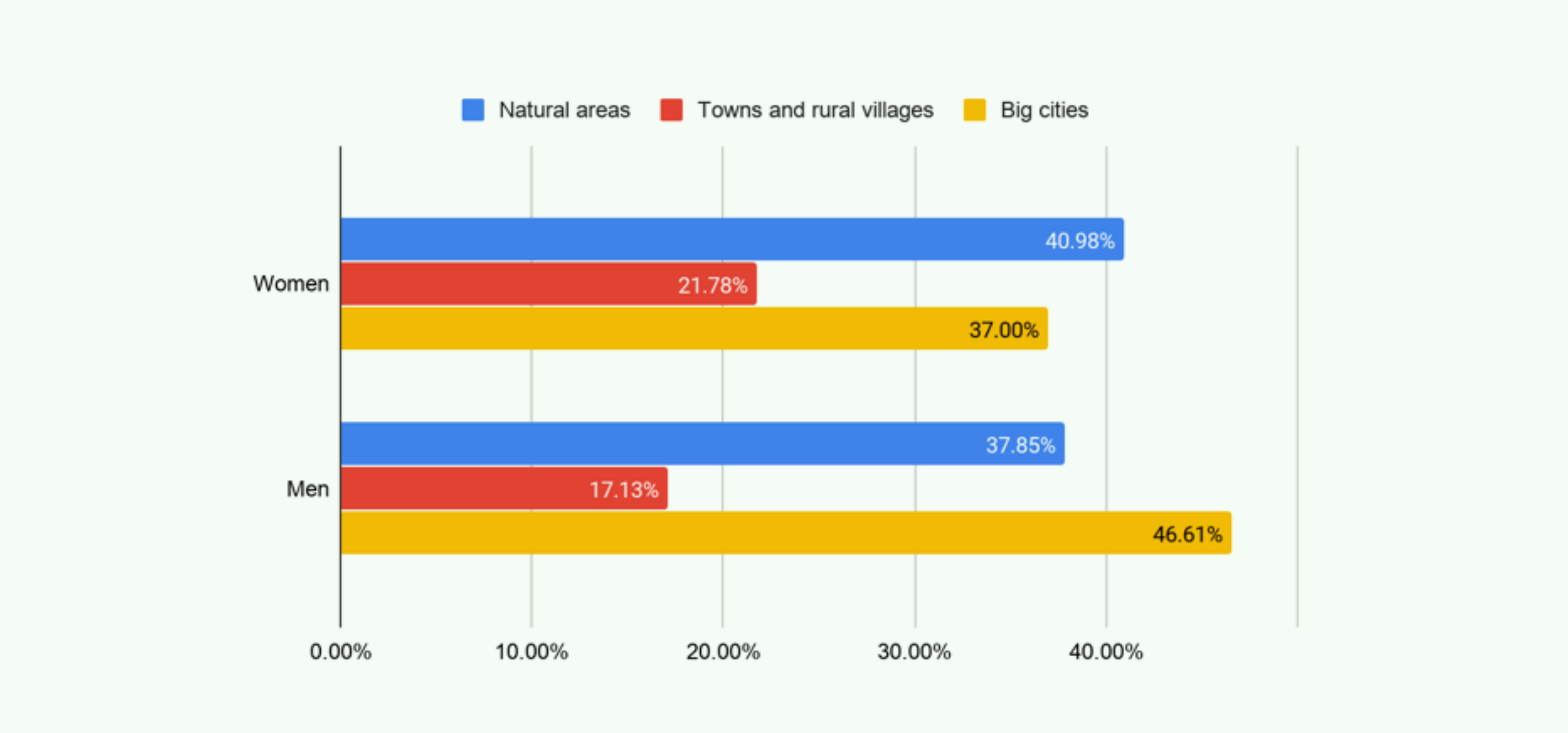

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Figure 32.- Top Travel Interests by Region

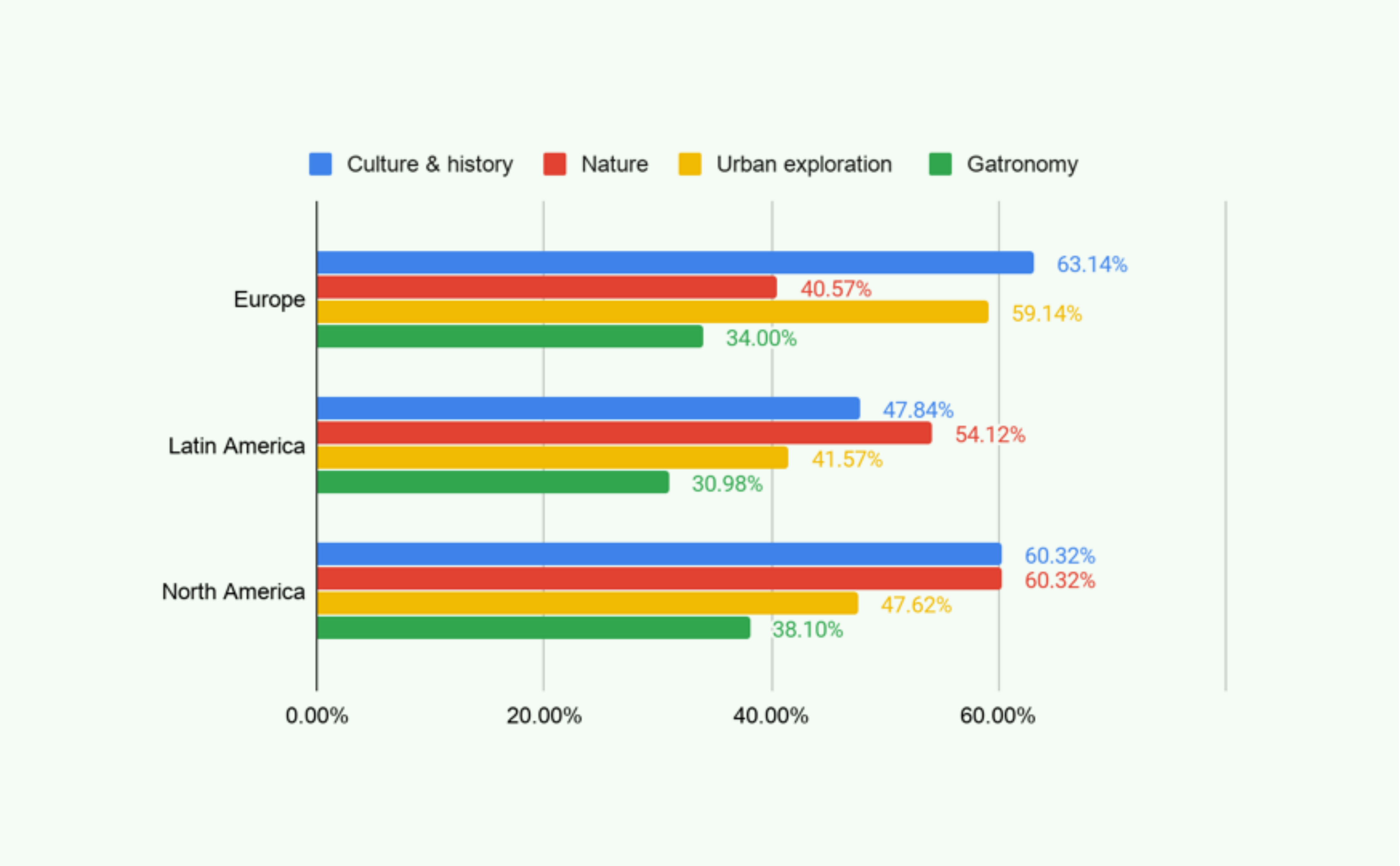

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Figure 33.- Survey Results: Top Travel Interests by Gender

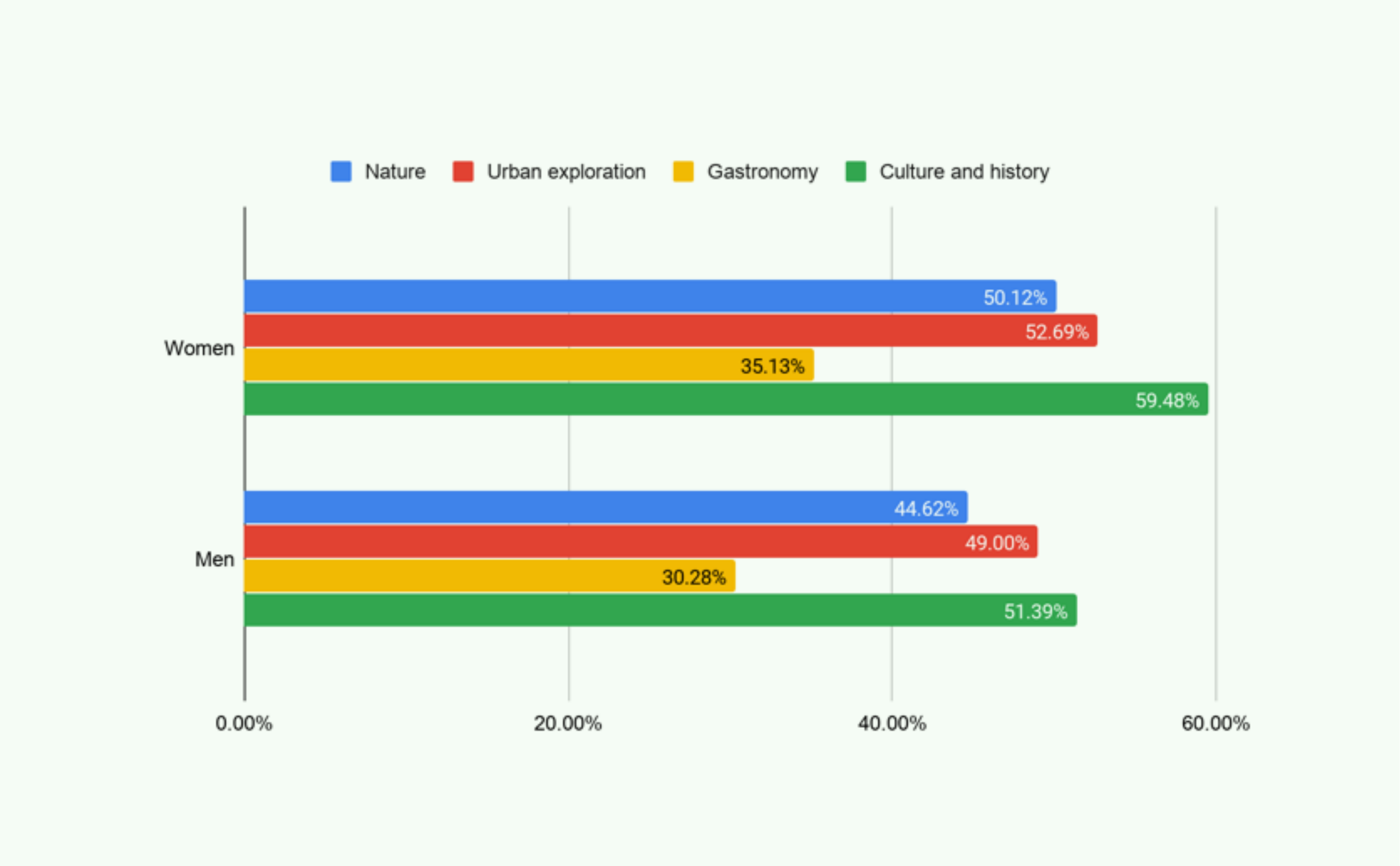

Figure generated by the author, through the platform Survey Sparrow

In terms of gender, the same top interests were found; however, the proportions were higher in women than men (Culture & history: 59.48% vs 51.39% respectively); (Urban exploration: 52.69% vs 49.00% respectively); (Nature: 50.12% vs 44.62% respectively) (Fig. 33).

»»» *During the global pandemic*

» Travel planning

By the time that the pandemic hit, 78.17% of the participants had travel arrangements; with an average of 2 planned trips (35.20%); the majority being for personal reasons (74.30%), followed by a mix of both personal and business trips (21.79%) and finally just business trips (3.91%) (Fig. 34).

Figure 34.- Survey Results: Planned Trips for 2020

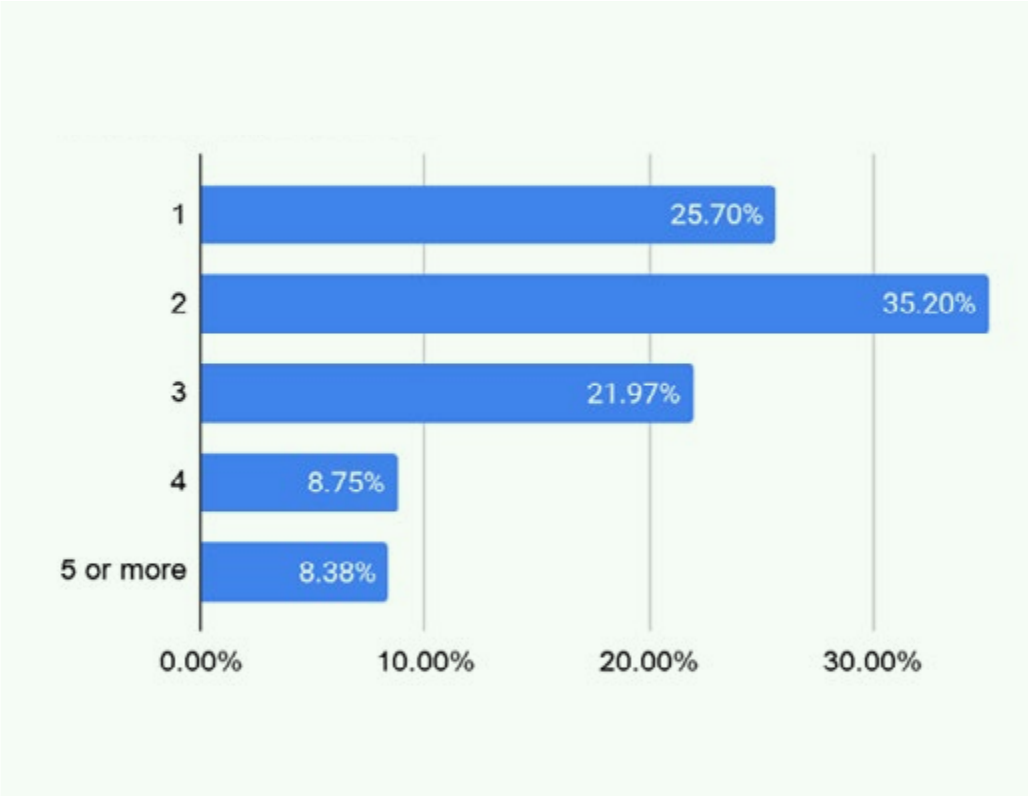

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Figure 35.- Survey Results: Planned Trips for 2020 by Region

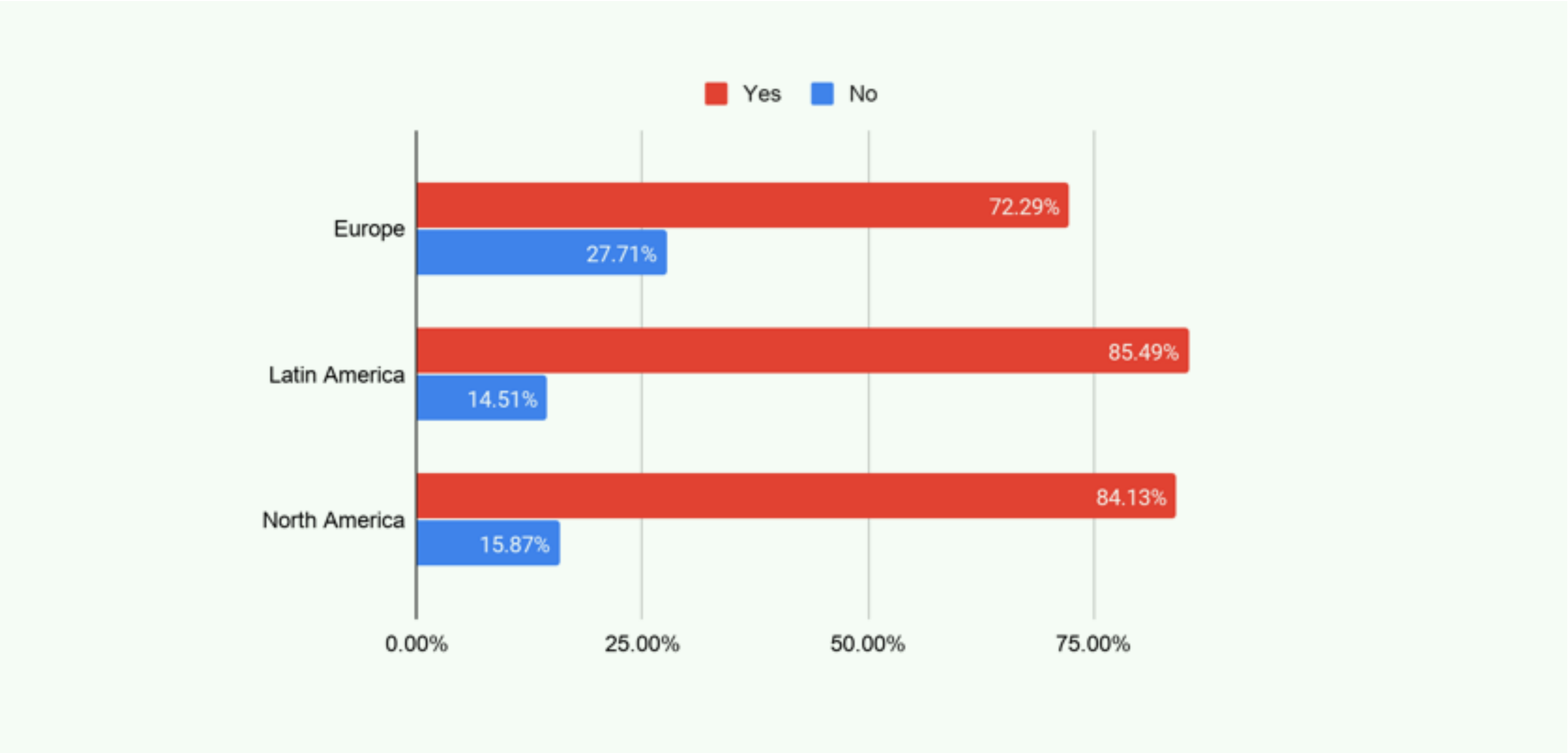

Figure generated by the author, through the platform Survey Sparrow

The majority of trips were to **international destinations** (46.74%), followed by a mix of both domestic and international travel (34.45%); while domestic travel only accounted for 18.81%.

» Sociodemographic variations

The proportion of **travel plans were higher in Latin America** (85.49%). In addition, planned trips to a foreign country were far more popular in Europe and Latin America (50.20% and 48.63% respectively), whereas travel plans for both domestic and international destinations ranked higher in North America (56.60%) (Fig. 35).

In terms of gender, men and women had about the same average of planned trips (34.87% vs 34.37%); however, **men had more international trips planned than women** (50% vs 44.95%), and **women were traveling more for personal reasons than men** (78.29% vs 67.65%).

››› Measures taken due to COVID-19

Given the critical situation globally, **79.89% of all travel arrangements for 2020 were cancelled** as of the time of the survey. **Among the top alternatives given** at time of cancellation, **people were offered a full refund of the money spent** (22.79%); followed by a voucher to be used at a later time (20.93%) and a partial refund based on terms and conditions (14.88%). Among the answers, **44.42% of responses were marked as "none of these options**", showing that participants may have had unknown alternatives (Fig. 36).

If people had the option to choose, **the majority would have preferred a full refund of the money spent** (63.99%), while 23.54% would have opted for a voucher. Although the possibility of donating the money was not among the highest rank, it was noted that people were more inclined to have the money go to a cause fighting against the virus, than to the company they made their travel arrangements with (12.49% vs 3.37% respectively) (Fig. 37) .

Figure 36.- Survey Results: Measures Taken for Cancellations

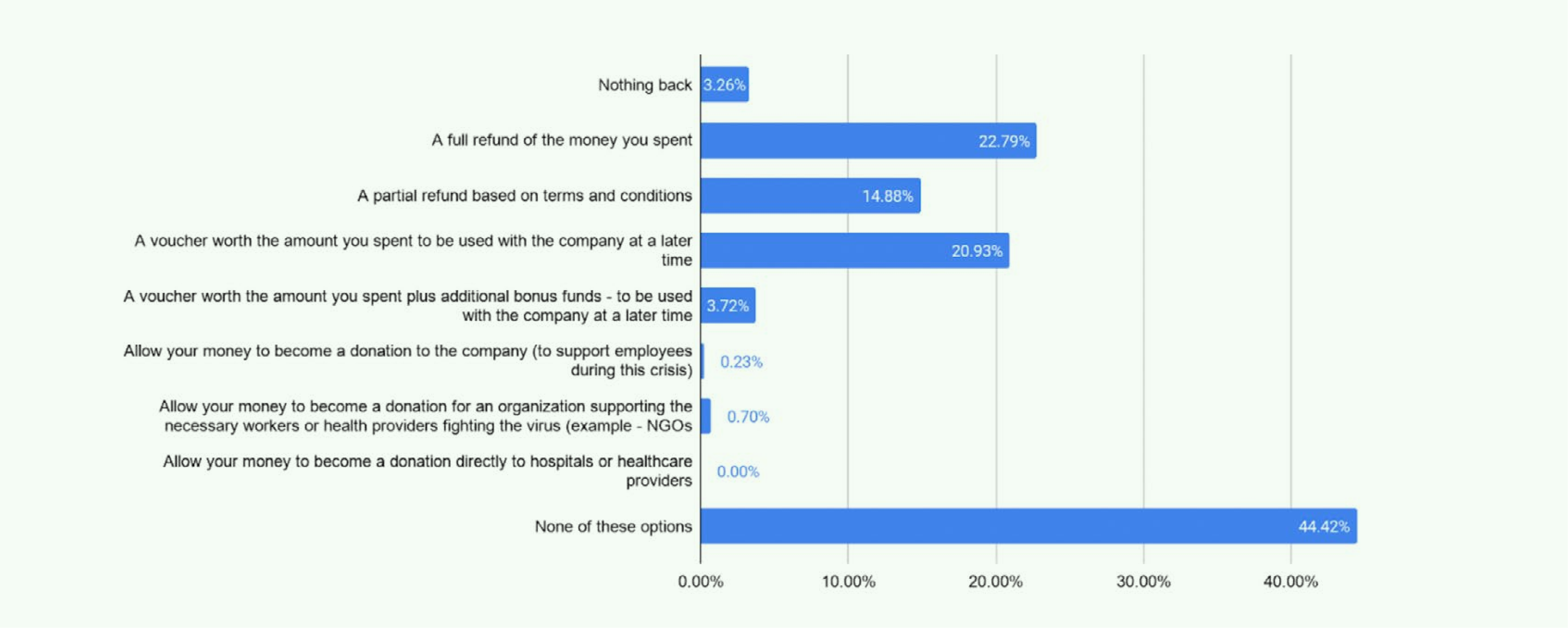

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Figure 37.- Survey Results: Preferred Alternative for Cancellations

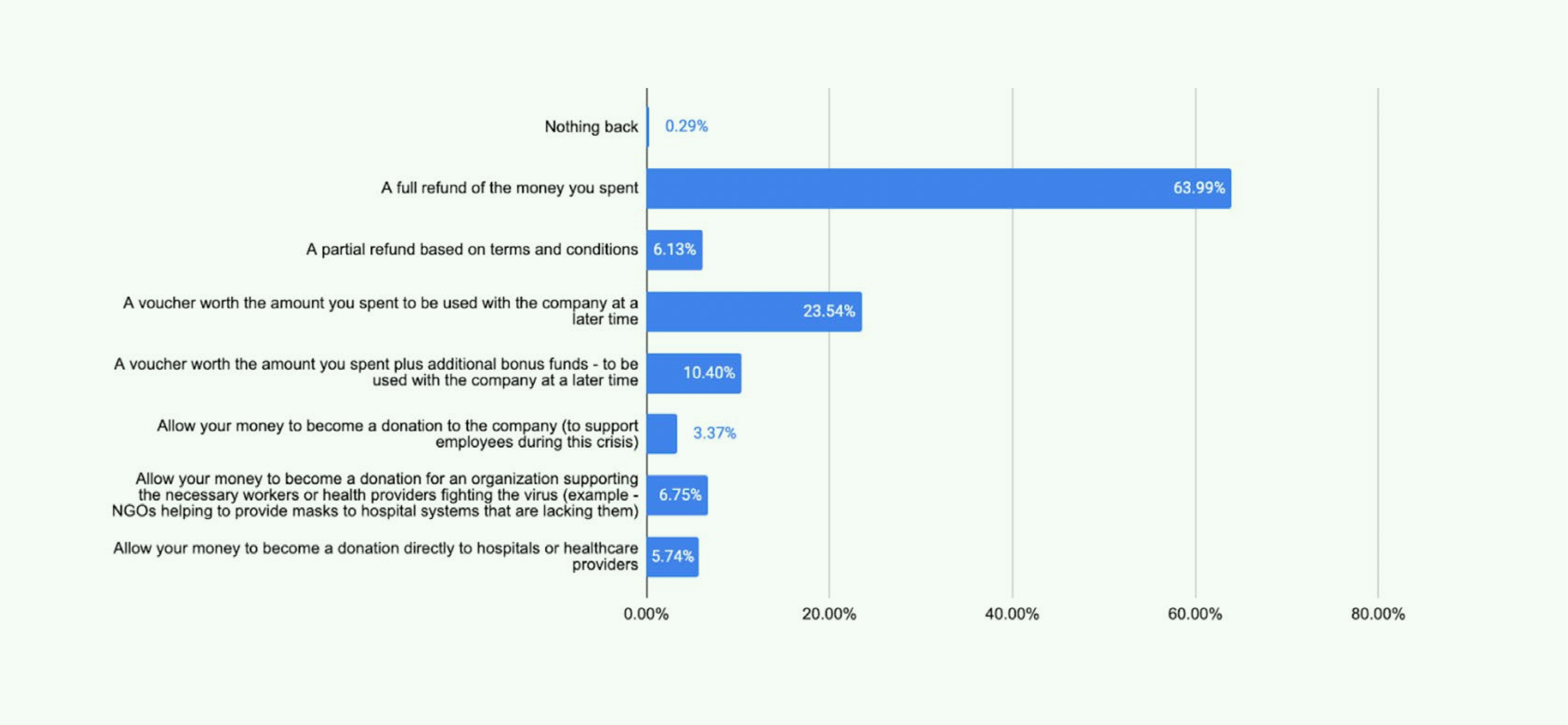

Figure generated by the author, through the platform Survey Sparrow

Nevertheless, despite the proposed or desired alternatives, **there was still a primarily positive attitude towards traveling**, as 75.58% of the people who had their travel plans cancelled said they would be willing to reschedule them during 2020. Furthermore, 63.32% would book for 2021 if they were offered a discount (Fig. 38).

Figure 38.-Survey Results: Rescheduling Cancelled Trips

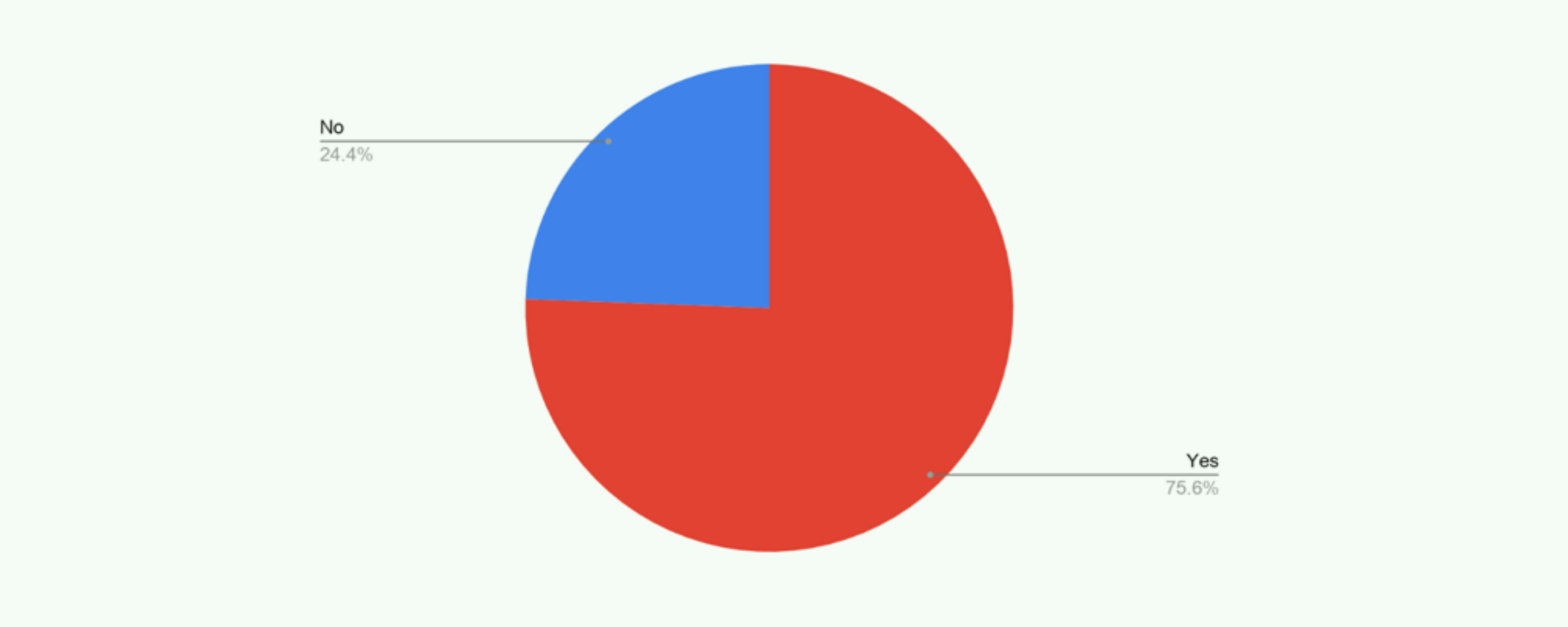

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Figure 39.- Survey Results: Virtual Experiences

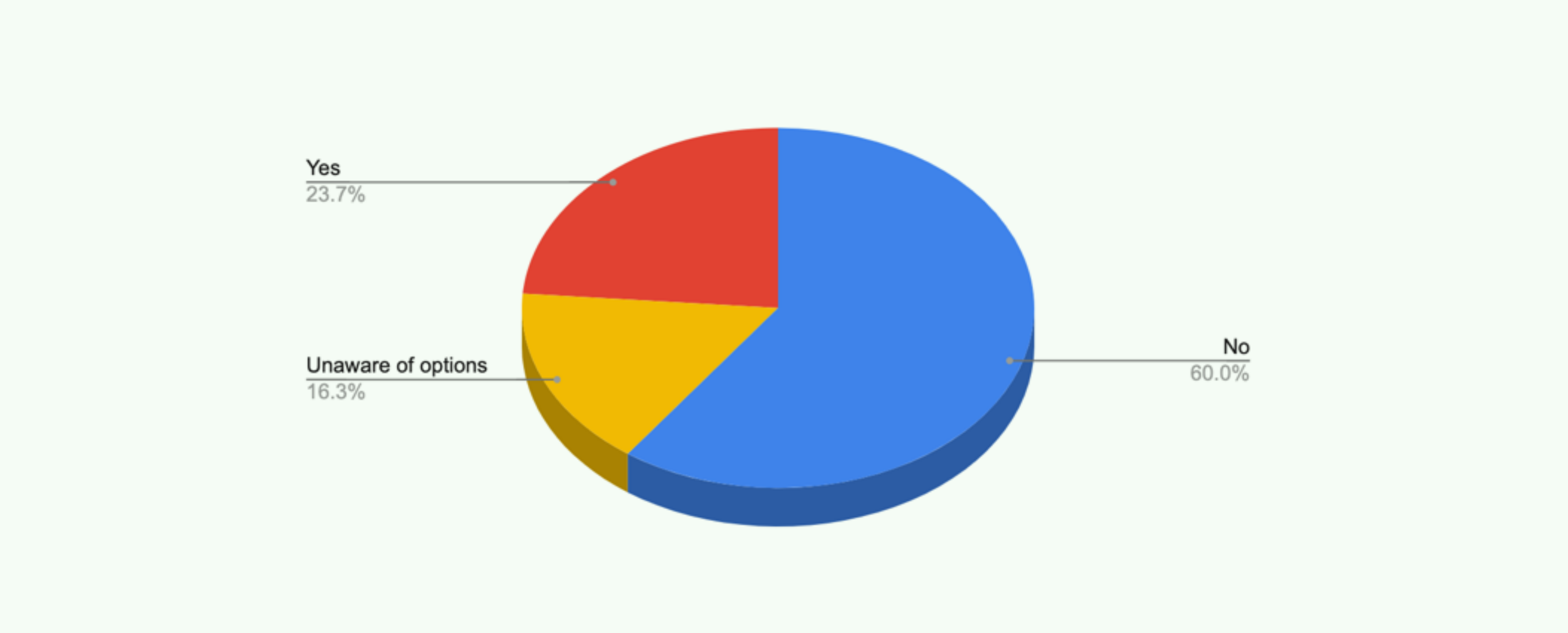


Figure generated by the author, through the platform Survey Sparrow

»› Sociodemographic variations

Although all three regions had a significant amount, **North America was the region with the highest** percentage of cancellations (88.68%), as opposed to Latin America, which had the majority of travel plans.

For the measures taken, there was a slight variation among regions. "None of these options"/unknown alternatives was the most selected within all regions, **a voucher was the second highest option reported in Latin America** (38.30%); whereas for **Europe and North America it was a full refund of the money** (27.27% and 40.43%). In addition, it was found that **women are more willing to reschedule their cancelled trips** than men (77.17% vs 72.35% respectively).

»› Impacts on travel experience

Due to travel restrictions and the rise in online options, participants were asked whether they had partaken in any virtual experiences. The end results showed that **only 23.73% did participate in virtual experiences and events** as of the time of the survey (Fig. 39).

In addition, the willingness to travel has remained strong, as **62.45% of respondents expressed that the COVID-19 pandemic has not had a negative impact on their desire to travel.** However, **guaranteeing health and**

Figure 40.- Survey Results: Travel Concerns Related to COVID-19

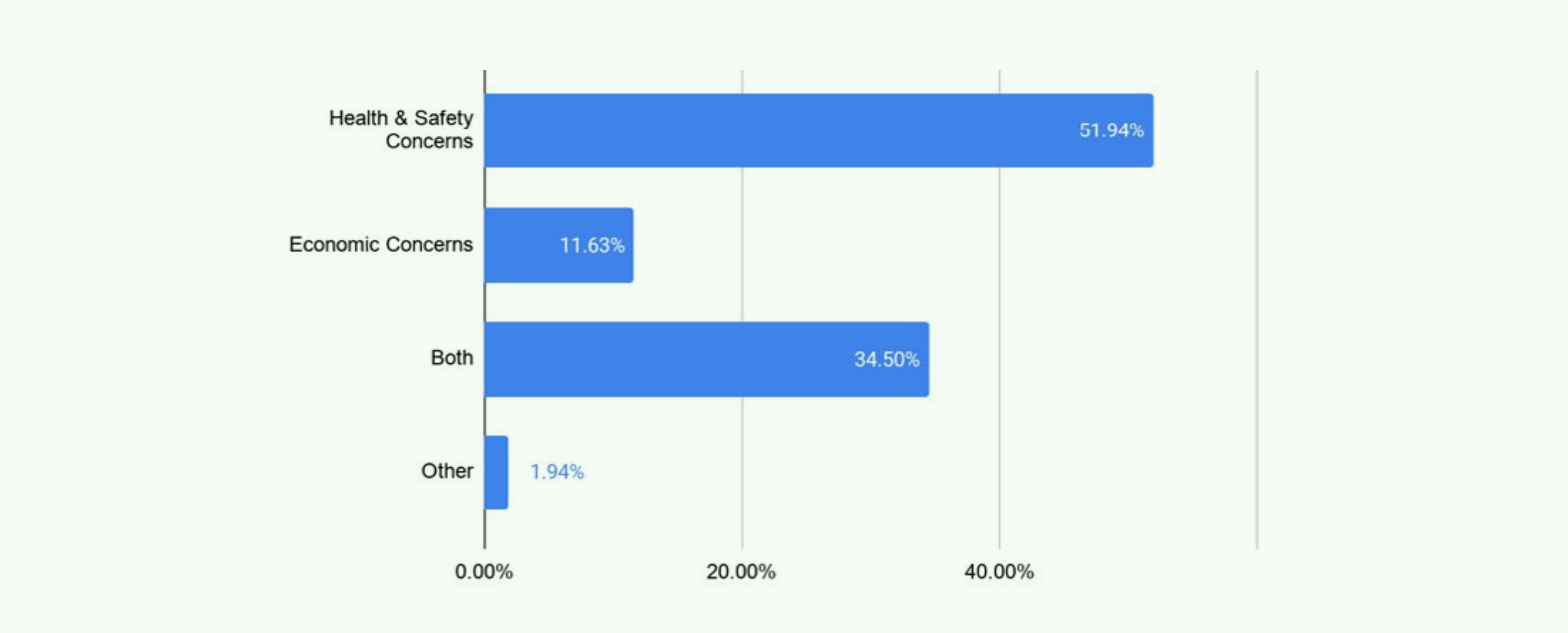
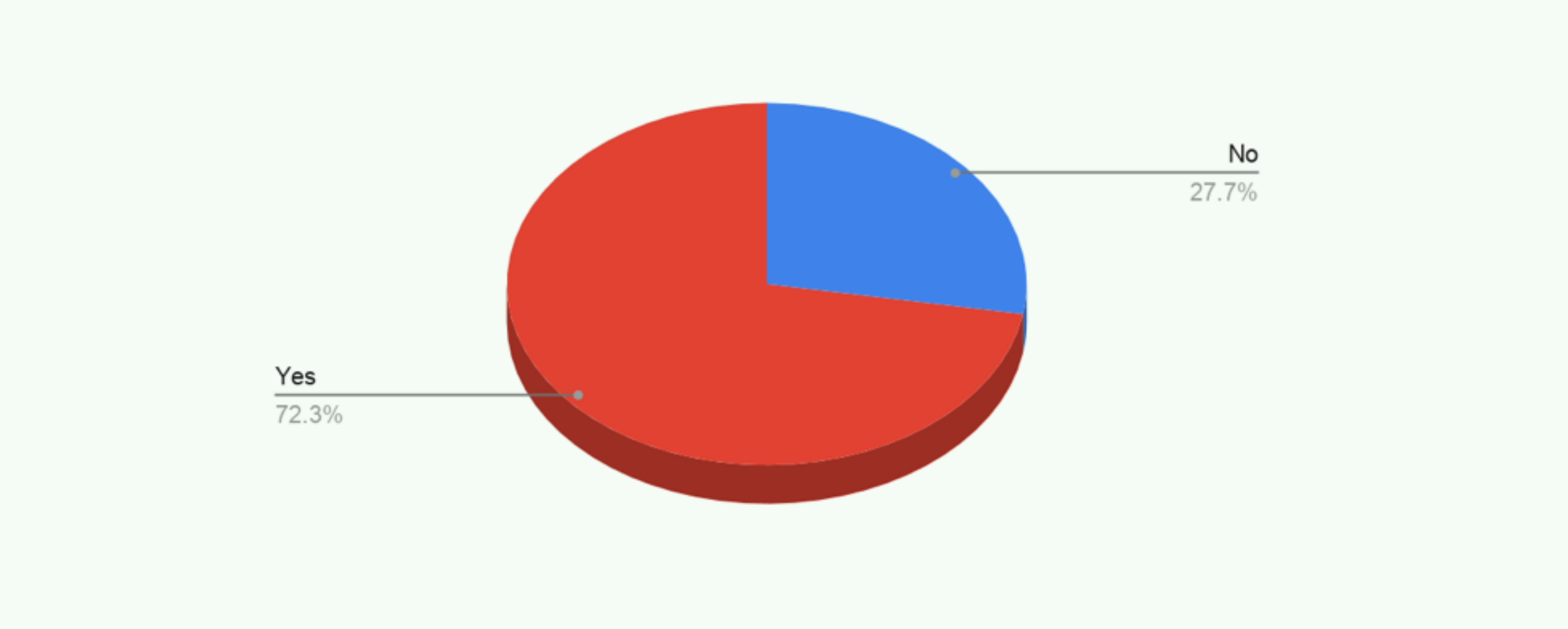


Figure generated by the author, through the platform Survey Sparrow

safety will be key in tourism, since out of the 37.55% of those respondents who did express concern about traveling, more than half of them related it to that aspect (51.94%); while just a small proportion related it to economic reasons (11.63%) (Fig. 40).

Hence, among the measures to regain the confidence in travel and tourism, having a certification that accredits health and safety measures used against COVID-19 would be beneficial. In fact, **72.34% of all participants would be more likely to book trips or experiences with a "COVID-19 Safe" certified company (Fig. 41).**

Figure 41.- Survey Results: Opinion on having a "COVID-19 Safe" Certification



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››› Sociodemographic variations

Concerning the desire to travel, there was a notable difference among regions, gender and age groups.

The COVID-19 outbreak did negatively impact the desire to travel in Latin America, particularly in more than half of the region's participants (55.69%); whereas in Europe and North America the negative impact was a lesser proportion (28% and 20.63% respectively) (Fig. 42).

Figure 42.- Survey Results: Negative Impact on the Desire to Travel by Region and Gender

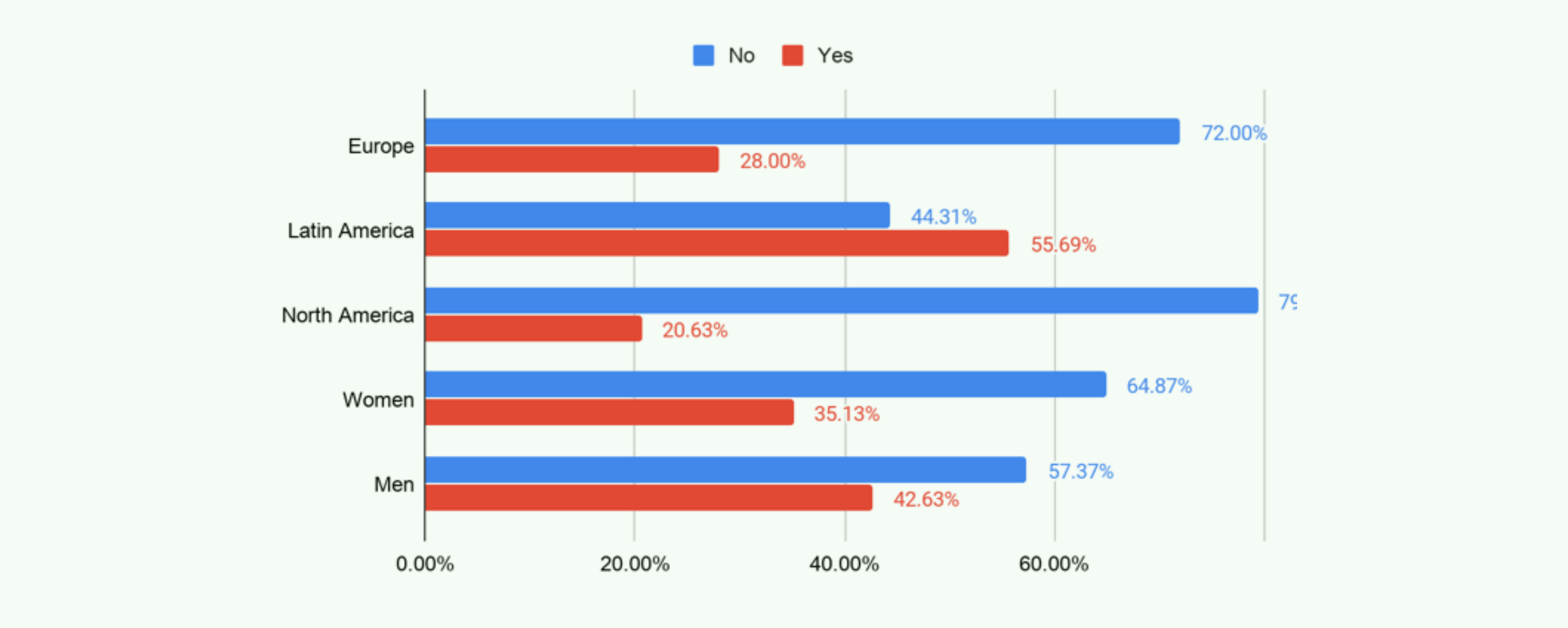

Figure generated by the author, through the platform Survey Sparrow

In terms of gender, although it was found that **COVID-19 affected the desire to travel in men more than women** (42.63% vs. 35.13%), **women felt more concerned for their health and safety than men** (54% vs. 48.60%) (Fig. 43).

Overall, **baby boomers felt more concerned about traveling** (61.22%) in comparison to other age groups; **with their primary concern being health and safety** (50%). This might be due to the fact that they have been shown to be one of the most vulnerable groups and overall are higher at risk. This trend was present across all three major regions (Europe 54.55%; Latin America 65.63%; North America 50%); however, **for baby boomers in Latin America, the main concern was related to the combination of economic and health and safety reasons** (47.62%).

Figure 43.- Survey Results: Travel Concerns by Region and Gender

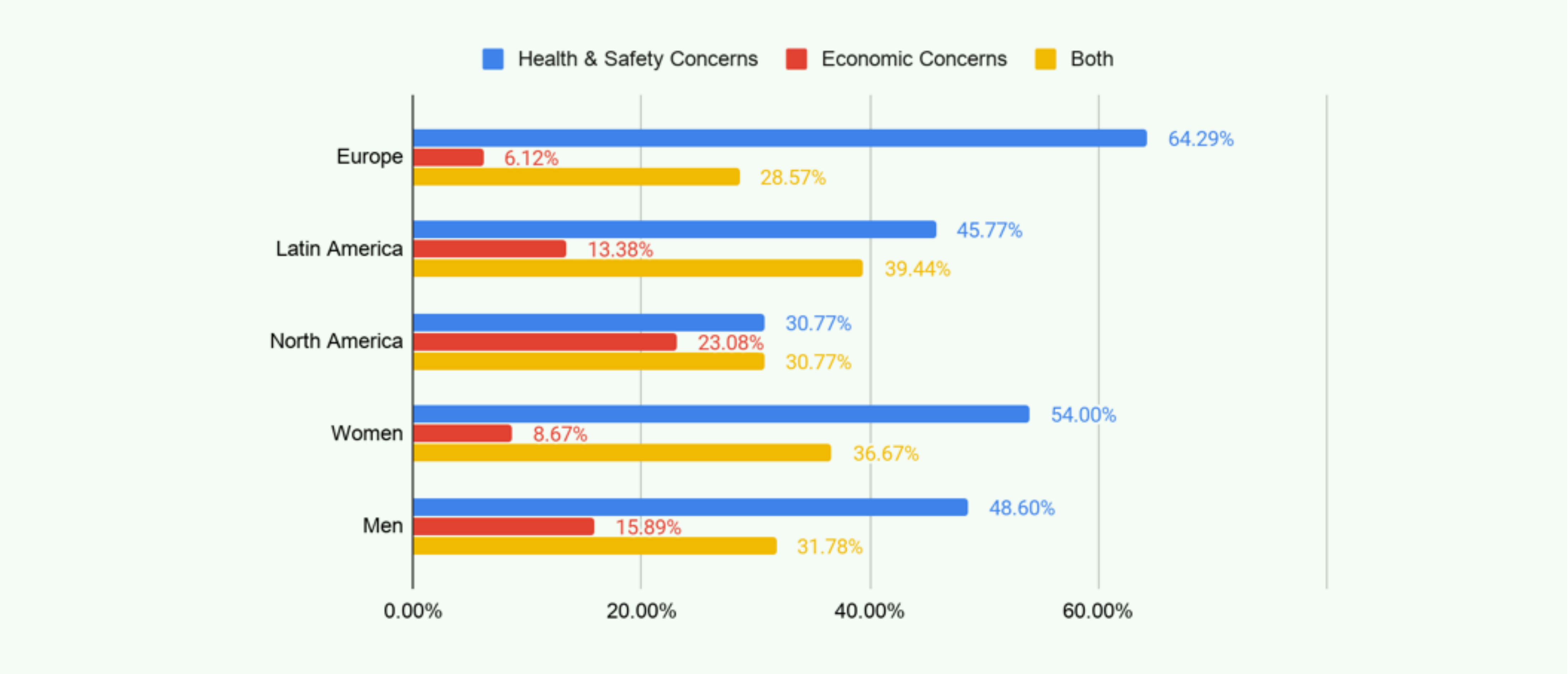

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Figure 44.- Survey Results: Travel Destination

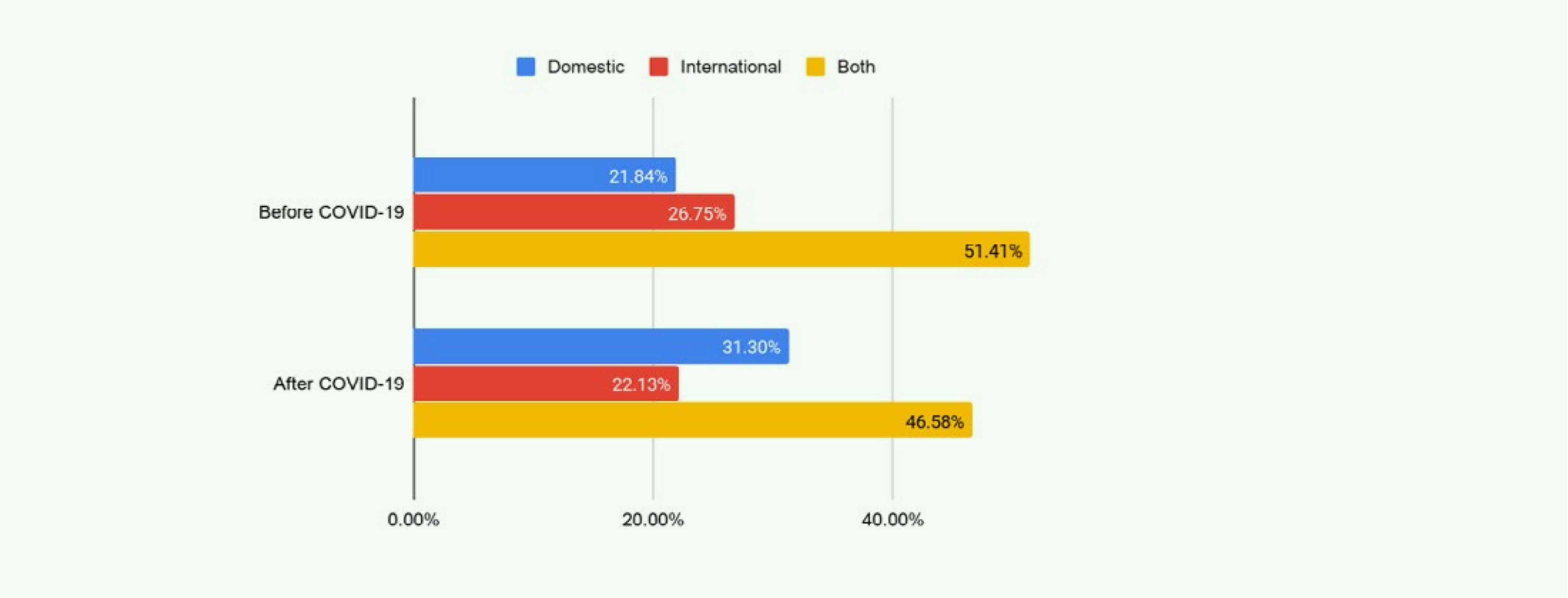

Figure generated by the author, through the platform Survey Sparrow

»»»» *After the global pandemic: a look to the future*

» Travel planning

People will still prefer to travel both domestically and internationally, but interest has decreased from 51.41% to 46.58%. Instead, there has been a shift towards domestic destinations (from 21.84% to 31.30%), showing that **people may be more willing to explore their own local or regional territories (Fig. 44).**

Furthermore, it appears **people will be more likely to travel domestically sooner**, as more than half of participants answered that they would do so **within the first three months** after restrictions are lifted (54.73%). On the other hand, **the willingness to travel internationally has lessened** (from 26.75% to 22.13%) and most **people will wait longer to do so**, with the majority choosing a period between 6 and 11 months (28.09%) (Fig. 45).

Figure 45.- Survey Results: Wait Time to Travel

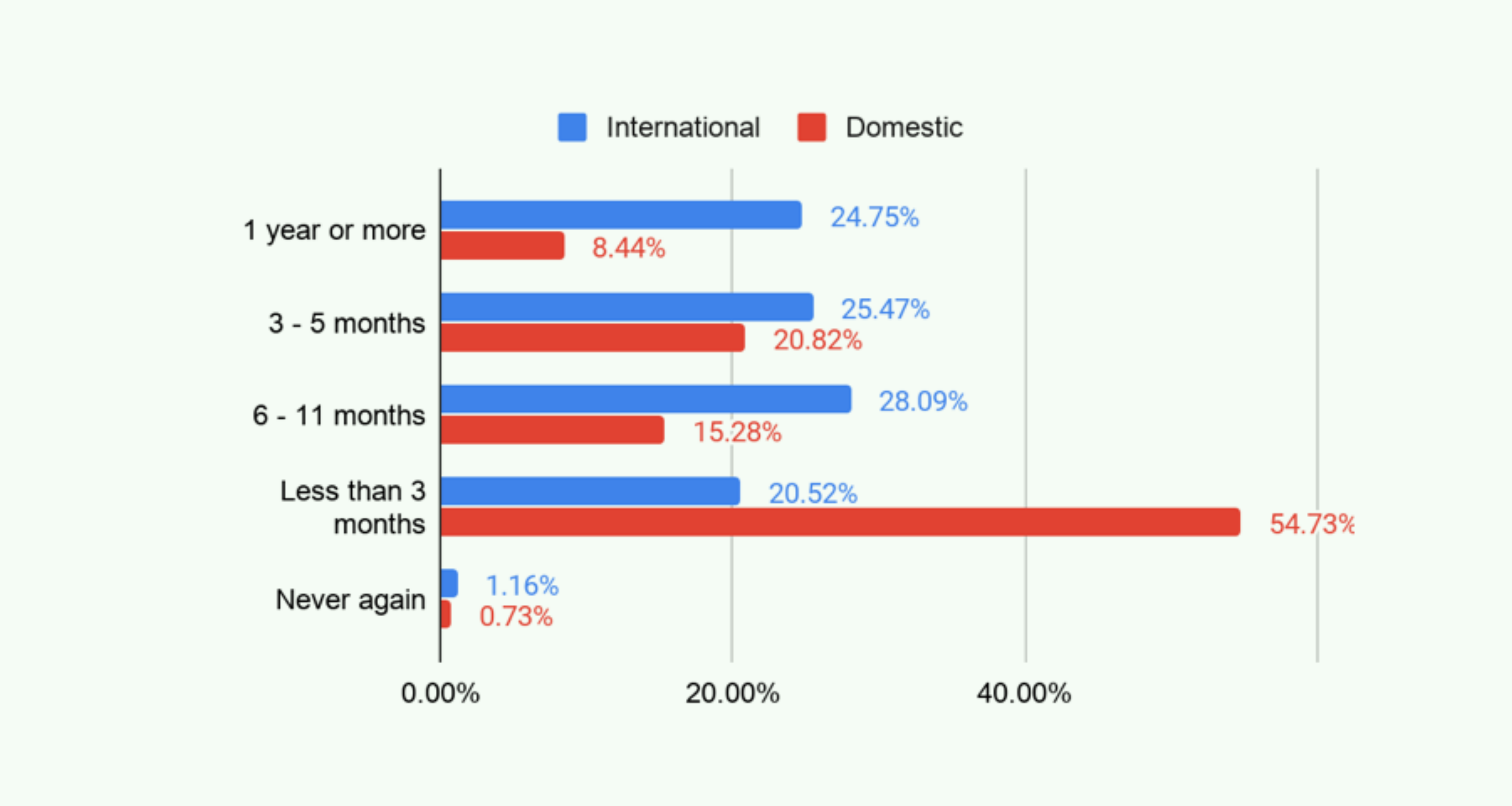

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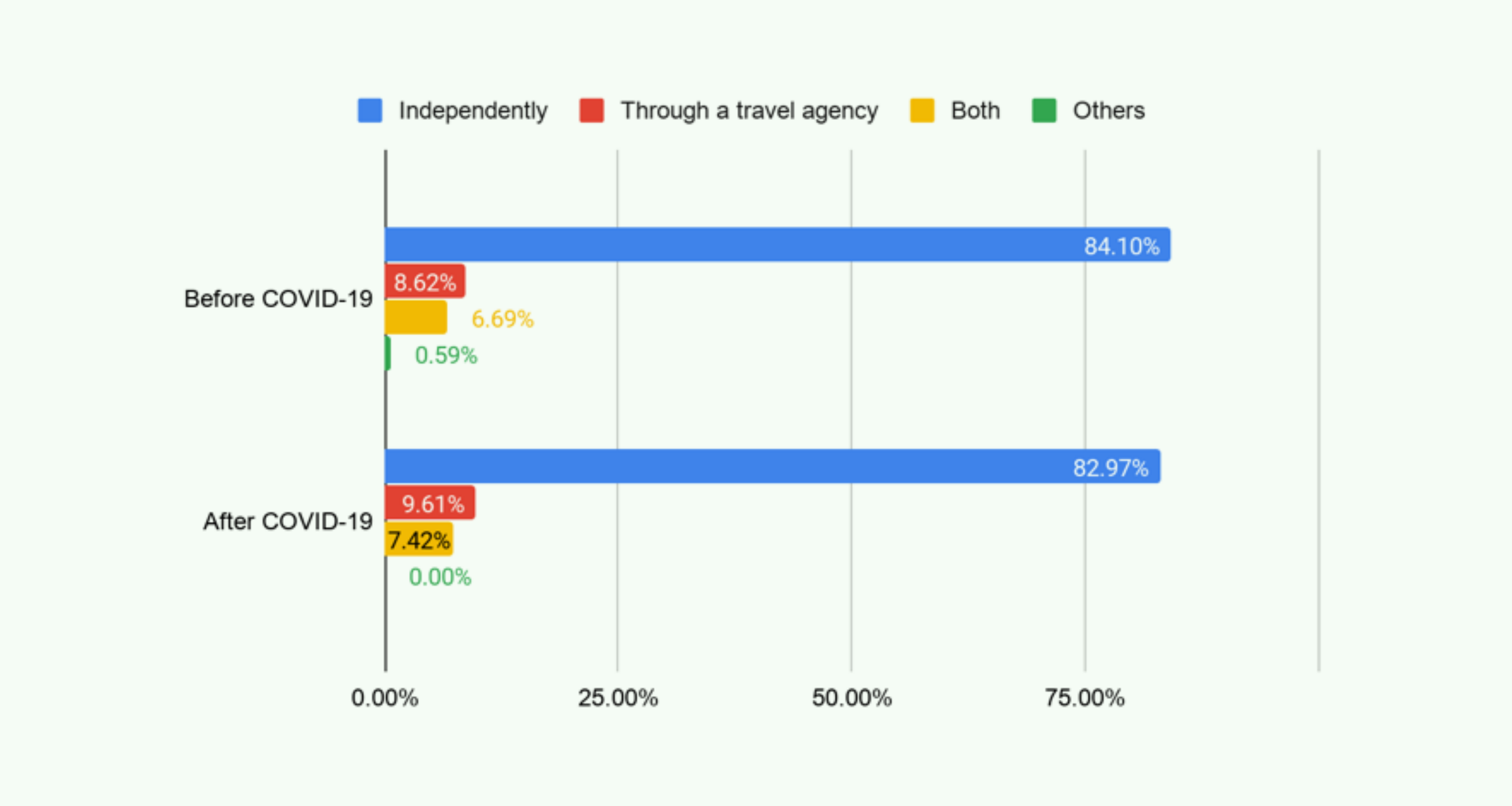
Figure 46.- Survey Results: Travel Arrangements



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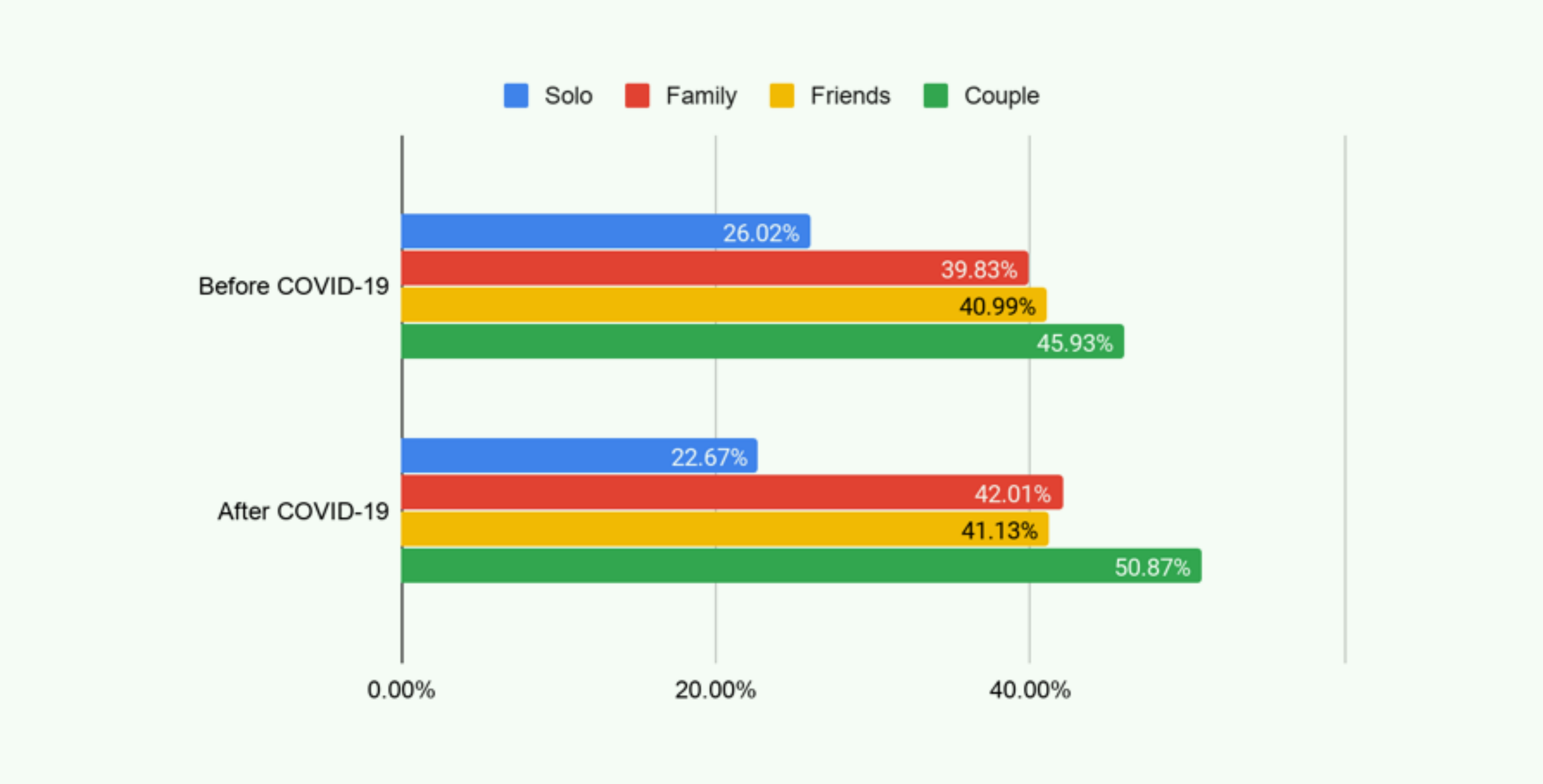
Also, it seems that **participants will continue to organize their travel plans independently** (with numbers slightly decreasing from 84.10% to 82.97%); and, while the use of travel agencies still remains low, there has been a modest increase towards the likelihood of using their services (from 8.62% to 9.61%) (Fig. 46).

In terms of travel companions, **participants stated that they plan to travel even more as a couple** (from 45.93% to 50.87%), **and less as solo travelers** (from 26.02% to 22.67%); a slight increase towards traveling with friends and with family was also noted. This shows that it is likely that after restrictions are lifted, people will still be willing to socialize and reunite for their travels (Fig. 47).

Figure 47.- Survey Results: Travel Companions



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» Sociodemographic variations

When compared with the patterns seen before the global pandemic, no significant variations were found across destinations. All regions and genders still prefer both domestic and international destinations, however **domestic travel gained in popularity among all regions** (North America +12.7%; Europe +10.13%; Latin America +7.24%) (Fig. 48).

Figure 48.- Travel Destination by Region

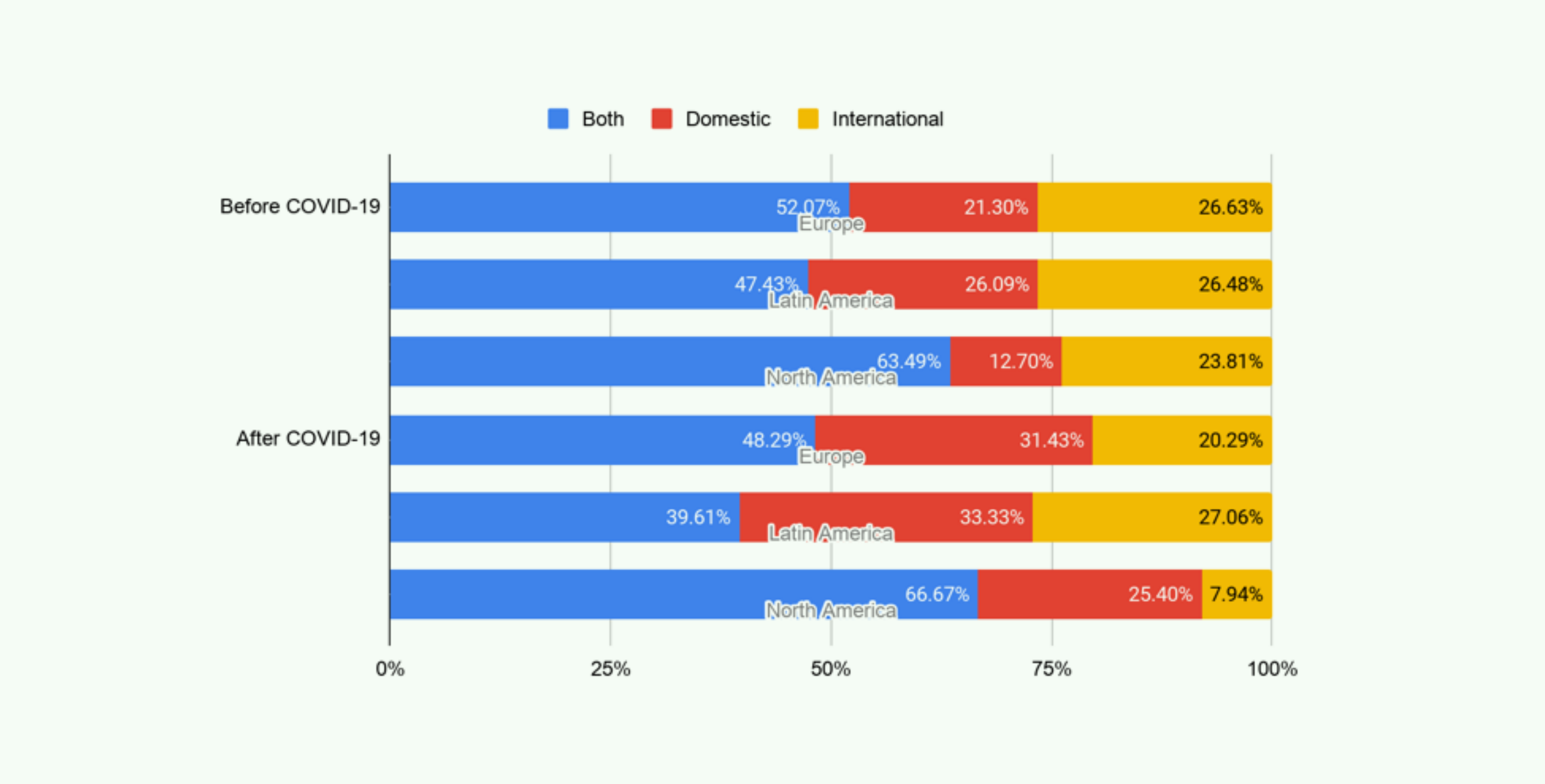

Figure generated by the author, through the platform Survey Sparrow

For travel arrangements, there was not a significant change among regions. In terms of gender, **men and women will still mainly book their trips independently** (82.87% vs 82.67%); however, women had a decrease of -2.29%, while men had an increase of +0.83%.

There wasn't a significant difference pertaining to travel companions either. In terms of regions, **traveling with friends became less popular in Europe**, with a decrease of -2.31%

(47.43%); whereas in Latin America and North America it increased +1.5% (31.76%) and +1.6% (38.10%) respectively. **This was particularly seen with women** in Europe, who marked that they will travel less with friends than before (from 51.53% to 46.72%) (Fig. 49).

Figure 49.- Survey Results: Travel Companions by Region

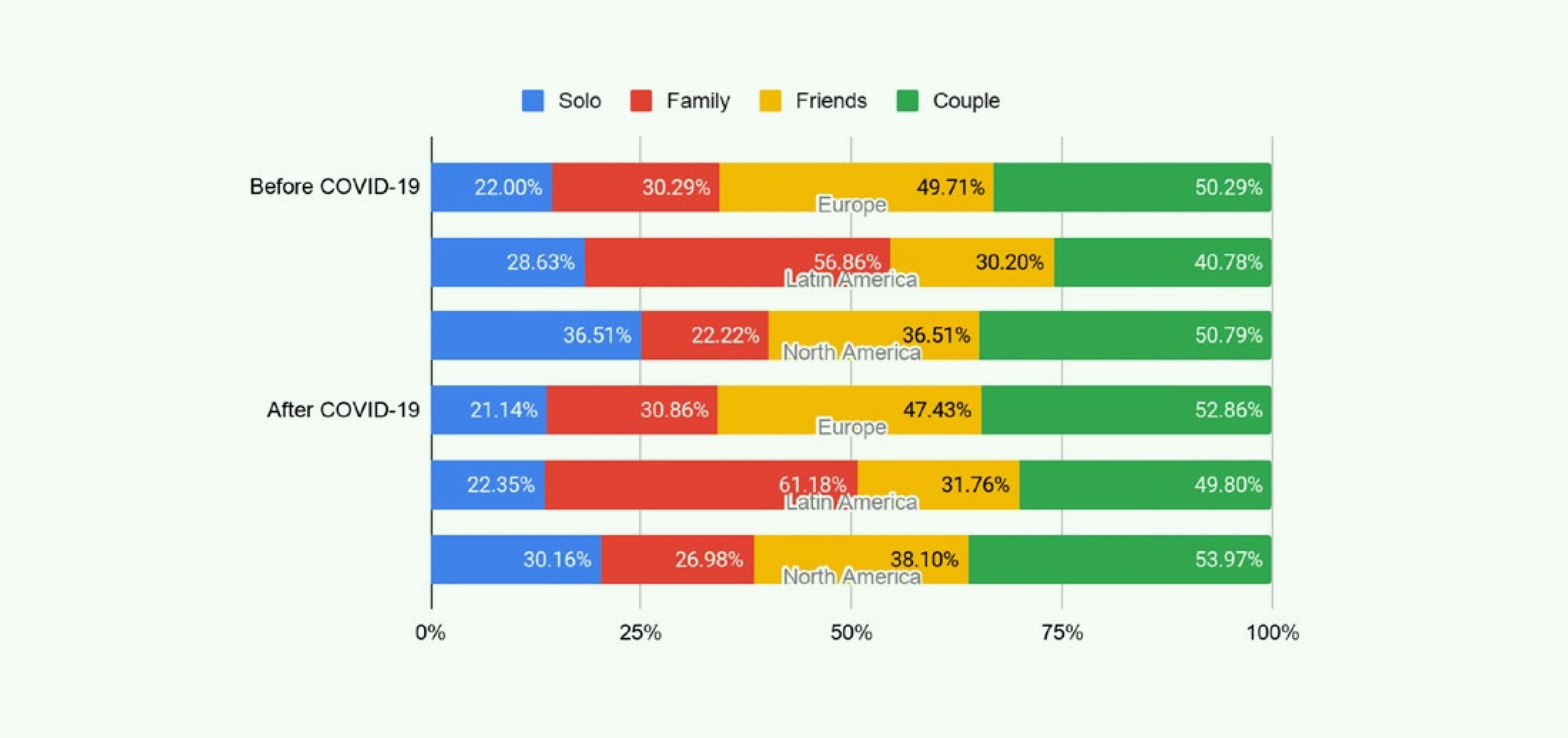

Figure generated by the author, through the platform Survey Sparrow

»› Travel experience

Participants still showed a preference to travel by plane, but in a smaller proportion (decreasing from 76.02% to 67.59%). Meanwhile, travel by car gained in popularity among participants, with an increase of +8.87% (raising the overall number to 62.94%). Notably, **the willingness to use traditional public transport decreased** between 4.80-10.03%. It is possible that the decrease in transport options available to the general public could be related to the fear of a higher risk of future infection (Fig. 50).

Figure 50.- Survey Results: Mode of Transport

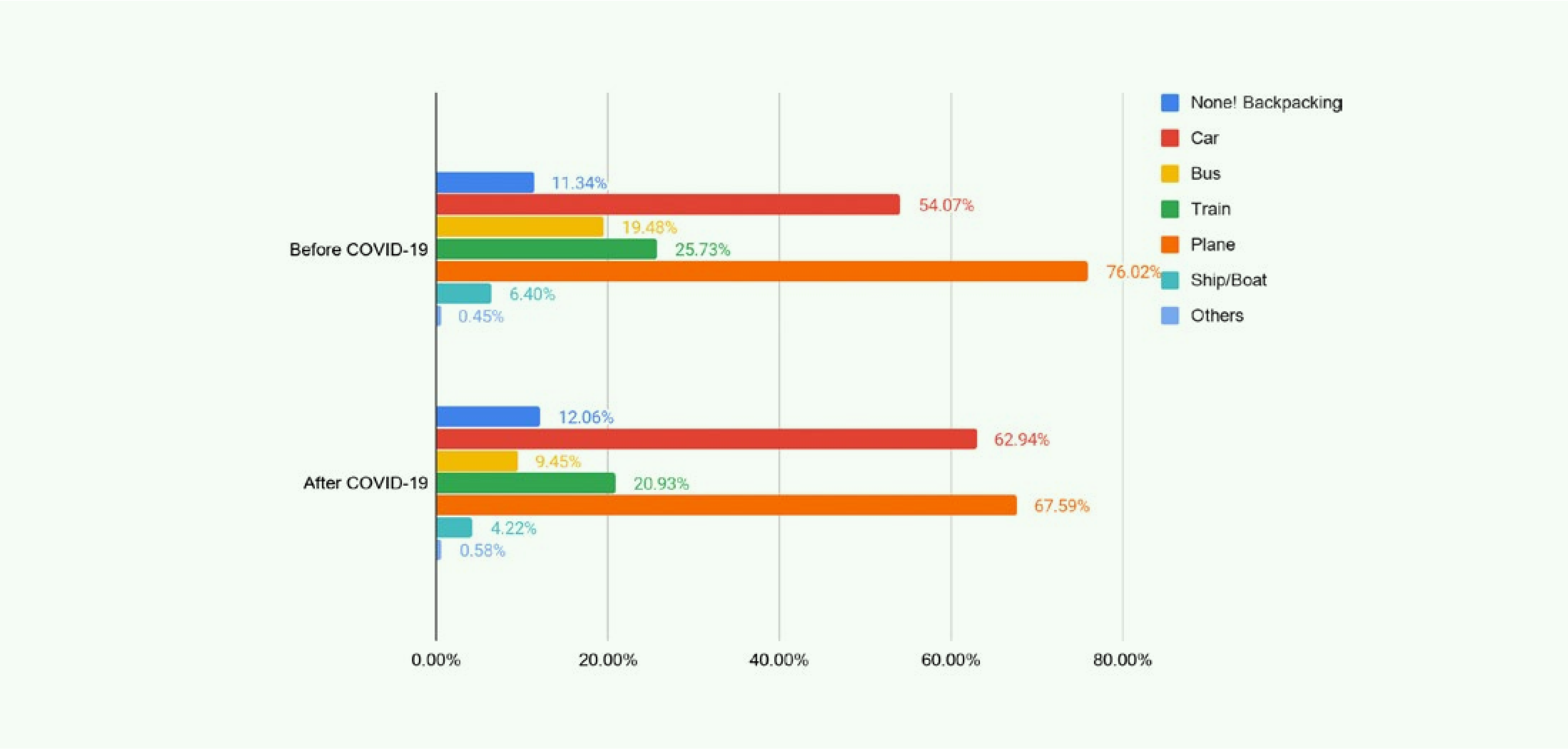

Figure generated by the author, through the platform Survey Sparrow

A significant change was found in the prefered travel environment. In terms of the future, **more than half of the participants have chosen natural areas as their new preferred option** with an increase of +17.44% to the original total (resulting in 56.83%). Big cities have thus become the second choice with a decrease of -14.68% from the original total (resulting in 26.16%). This shows that **people will prefer quiet and less crowded places in the future (Fig. 51).**

Figure 51.- Survey Results: Travel Environment

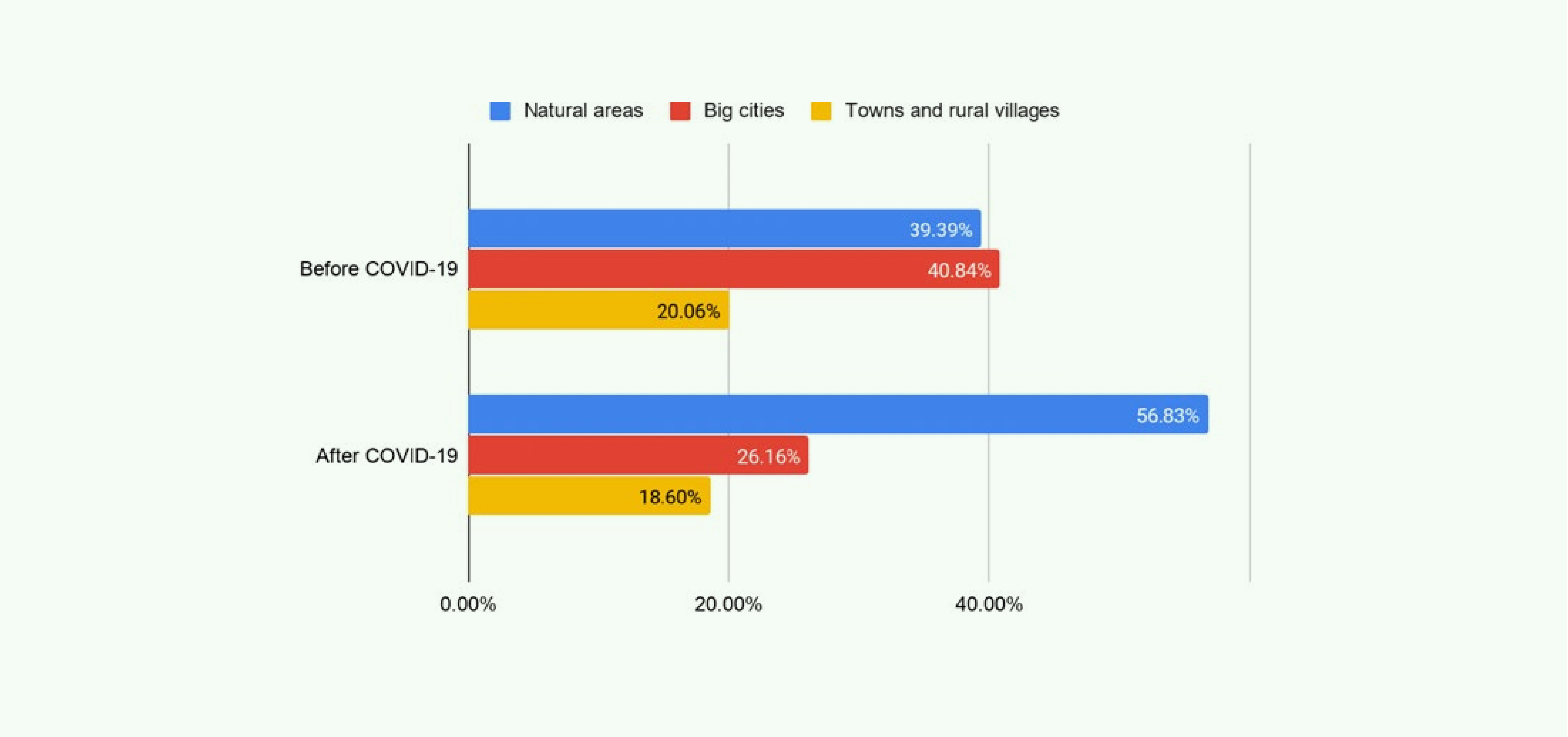

Figure generated by the author, through the platform Survey Sparrow

A change was also found in the main interests. Now **more than half of participants have chosen nature as their new top interest** with an increase of +7.70% (overall 55.52%); whereas culture and history became the second choice with a decrease of -3.20% (overall 53.20%). The previously stated second highest interest, urban exploration, has dropped to third place from 51.45% to 46.22% (Fig. 52).

Figure 52.- Survey Results: Top Travel Interests

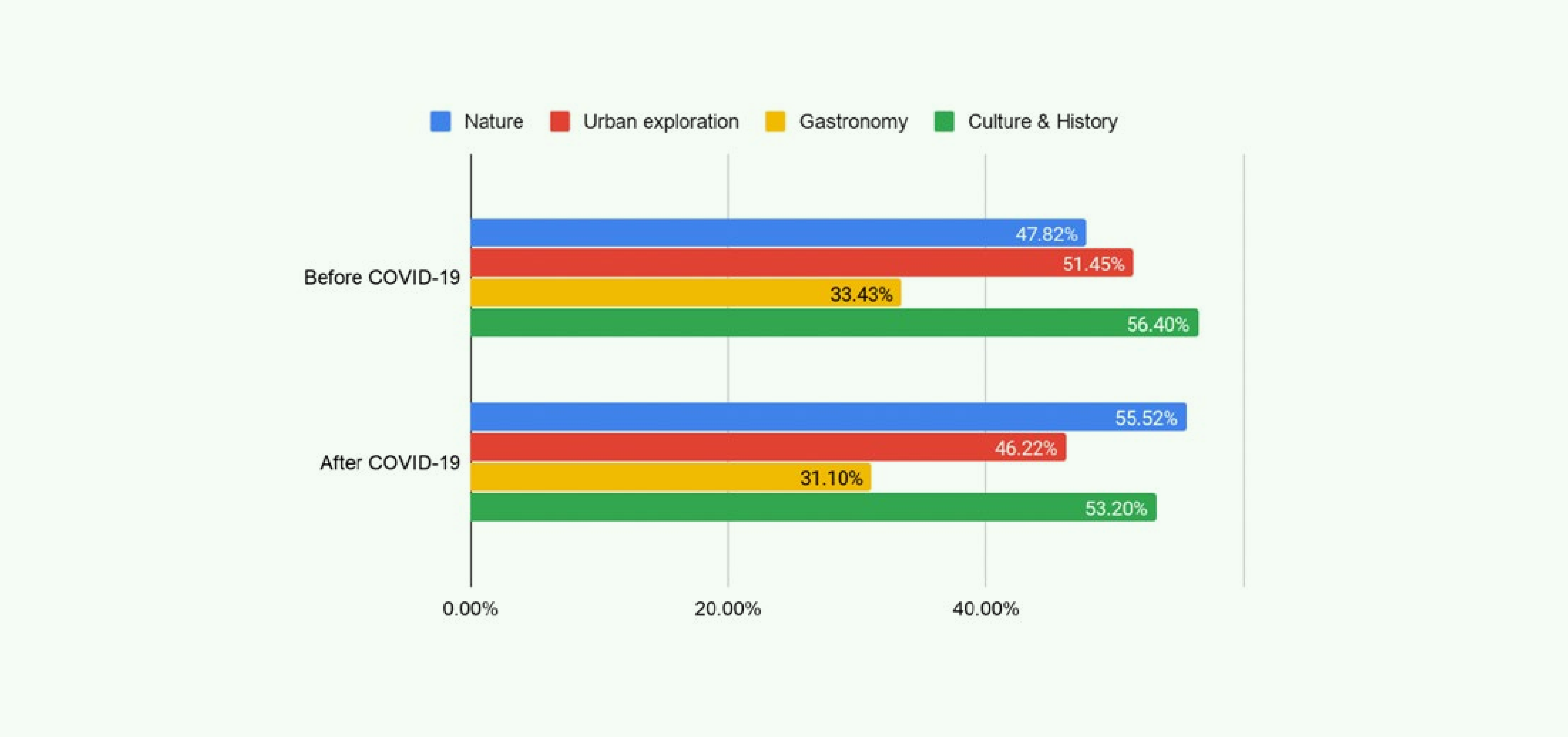

Figure generated by the author, through the platform Survey Sparrow

In terms of alternative activities, of the participants who had previously partaken in virtual tours and experiences during the global pandemic, **39.30% stated they would be likely to book an in-person activity with the same organization once travel restrictions are lifted**, while 38.57% stated that they would not.

In addition, **participants were asked to express their degree of interest in workshops about traditional activities and local culture** in their domestic destination, which was measured on a scale from 0 to 10; **the majority were interested**, with 56.33% selecting numbers on the higher end of the scale from 7 to 10 (including 22.42% who answered a solid 10) (Fig. 53).

Figure 53.- Survey Results: Participation in Cultural Experiences

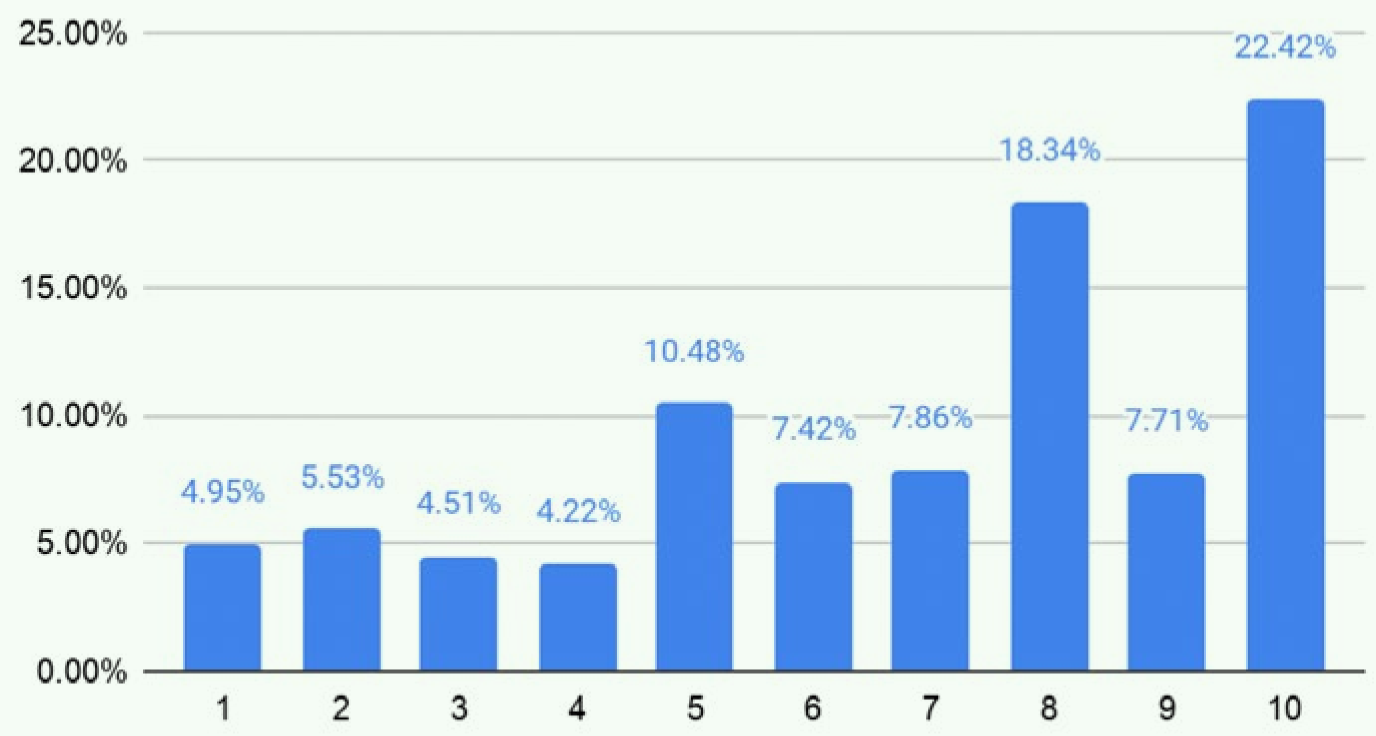

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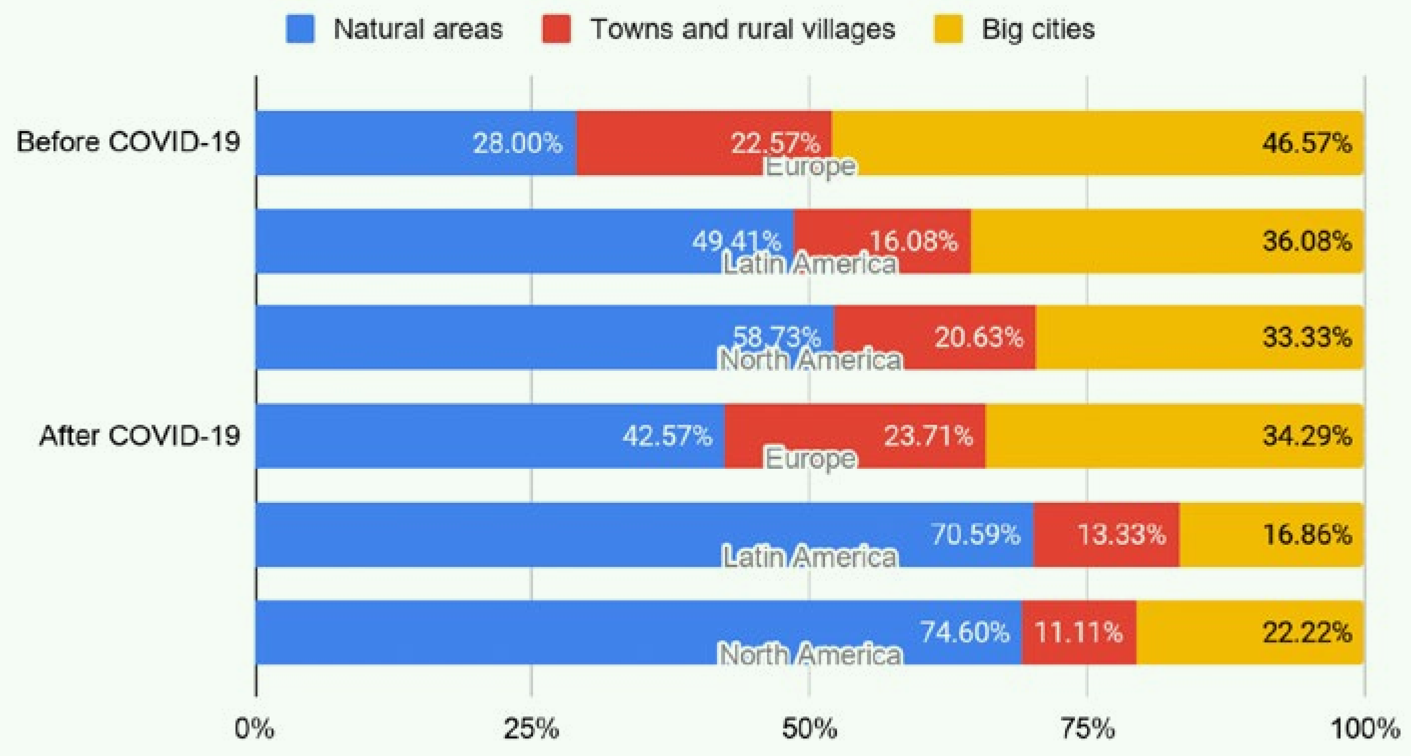
Figure 54.- Survey Results: Travel Environment by Region



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»Sociodemographic variations

For transportation, when compared with the results before the global pandemic, a difference among gender was found - now **men are less likely to travel by plane than women** (65.74% vs 68.85%). **In all regions, the desire to fly decreased**, while traveling by car increased (Europe: -8.19% vs +7.72% respectively); (Latin America: -5.98% vs +5.53% respectively); (North America: -4.75% vs +3.17%).

For the preferred future travel environment, **all three regions chose natural areas as their main option**; for North America and Latin America it became even more popular (74.60% and 70.59% respectively); and, for Europe, it became their first choice (42.57%), overtaking the previously preferred big cities (Fig. 54).

In terms of gender, **both women and men marked that they will prefer natural areas in the future** (58.55% vs 54.18% respectively); this continued to be the main preference for women, but in higher proportions, while **it became the first choice for men**, as opposed to the previously preferred big cities (Fig. 55).

Figure 55.- Survey Results: Travel Environment by Gender

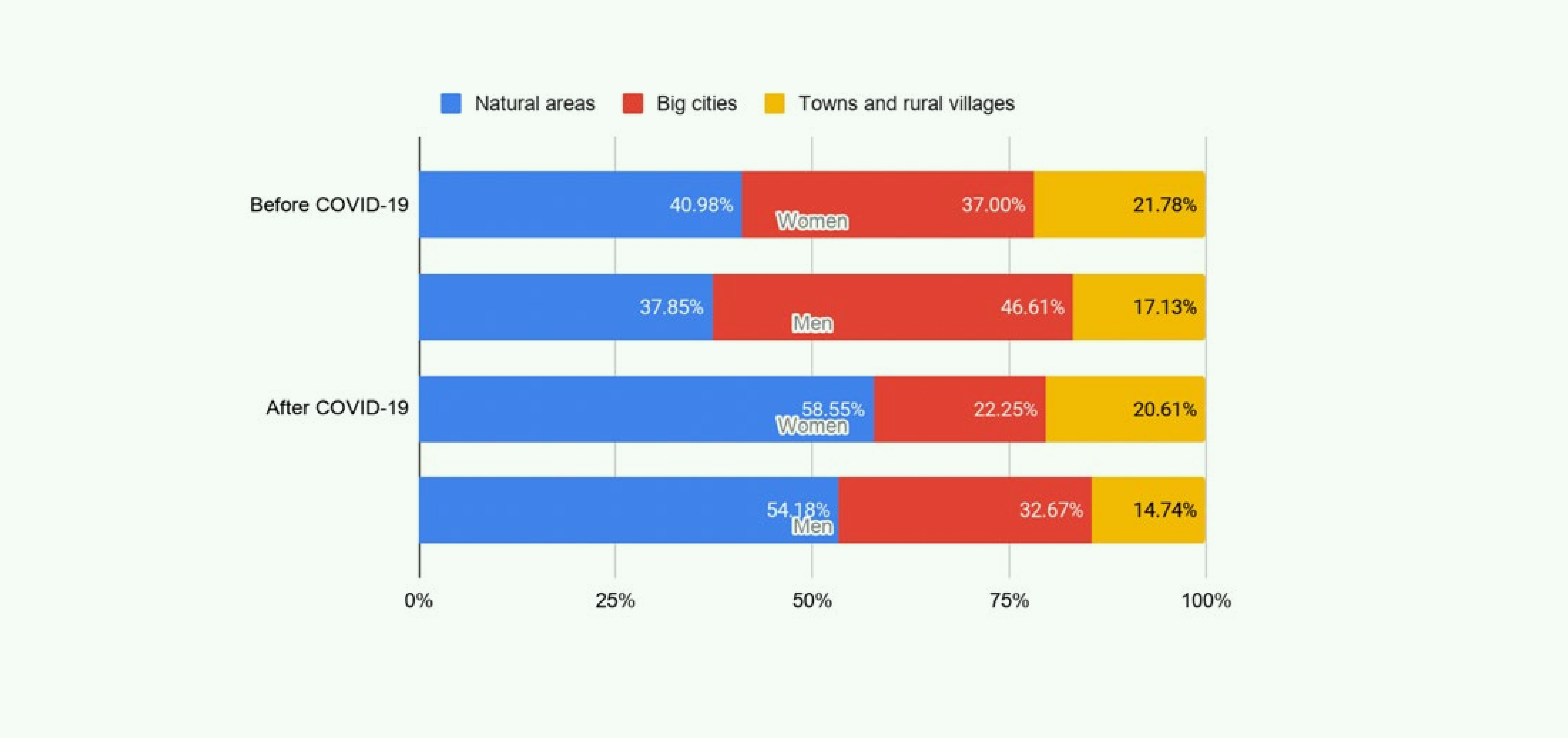

Figure generated by the author, through the platform Survey Sparrow

There was not a significant change within regions concerning main interests when traveling. For North Americans and Latin Americans, nature remained at the top of their interests (68.25% and 62.75% respectively); followed by culture and history (50.79% and 45.88% respectively) and urban exploration (36.51% and 34.90% respectively).

For Europeans, culture and history remained as the first choice (59.14%); followed by urban exploration (57.14%) and nature (47.43%). However, it is important to mention that **nature gained in popularity across all three regions** (Latin America +8.61%; North America +7.93%; Europe +6.86%) (Fig. 56).

Figure 56.- Survey Results: Top Travel Interests by Region

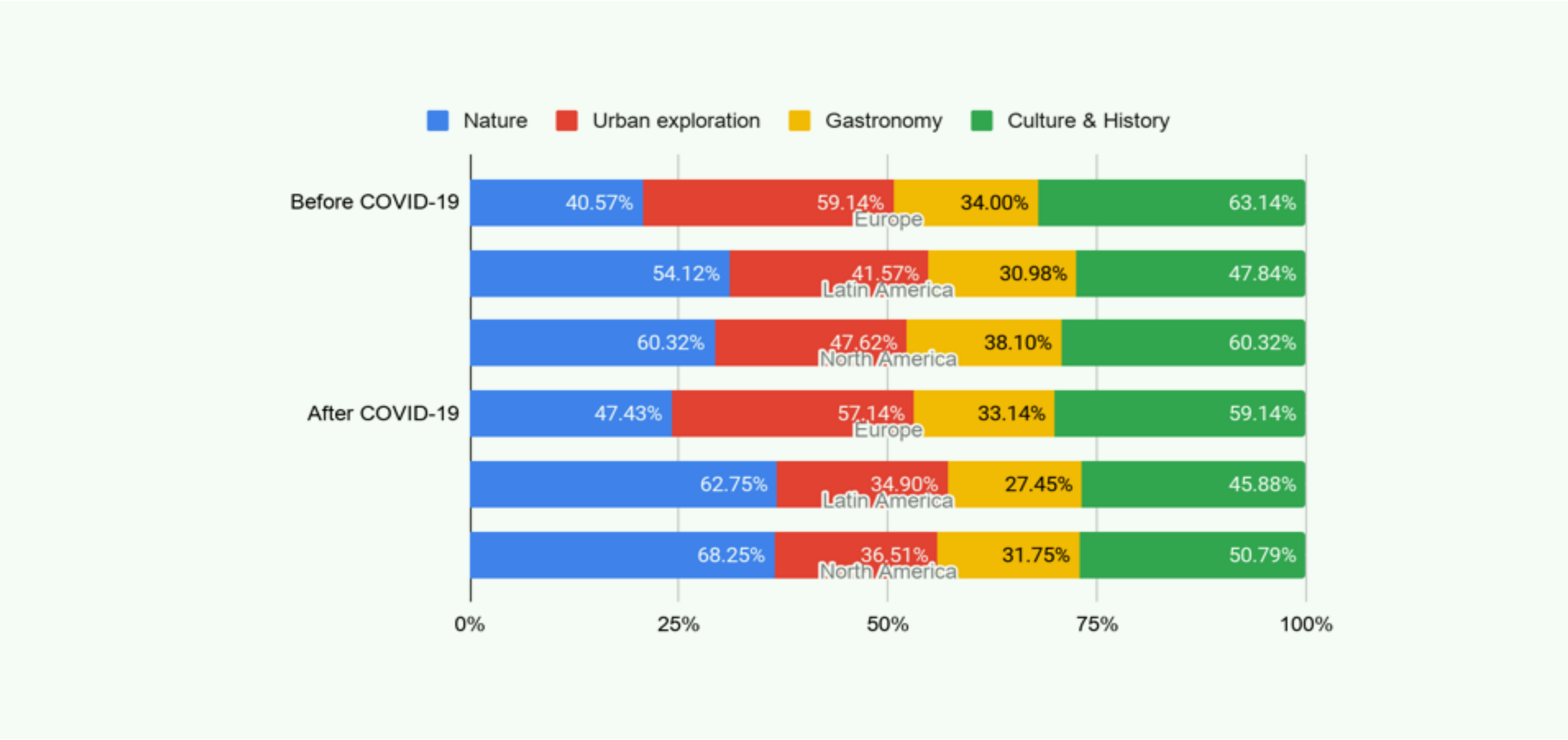

Figure generated by the author, through the platform Survey Sparrow

In terms of gender, **nature became the top interest for both women and men** (57.61% vs 51.39% respectively), followed by culture and history (56.44% vs 47.81%) and urban exploration (46.84% vs 45.42%) (Fig. 57).

For the alternative activities, it was found **that people in Latin America would be more interested in local workshops** (65.10%); whereas **people in Europe would be keener to try out virtual travel experiences** (42.86%) (Fig. 58).

Figure 57.- Survey Results: Top Travel Interests by Gender

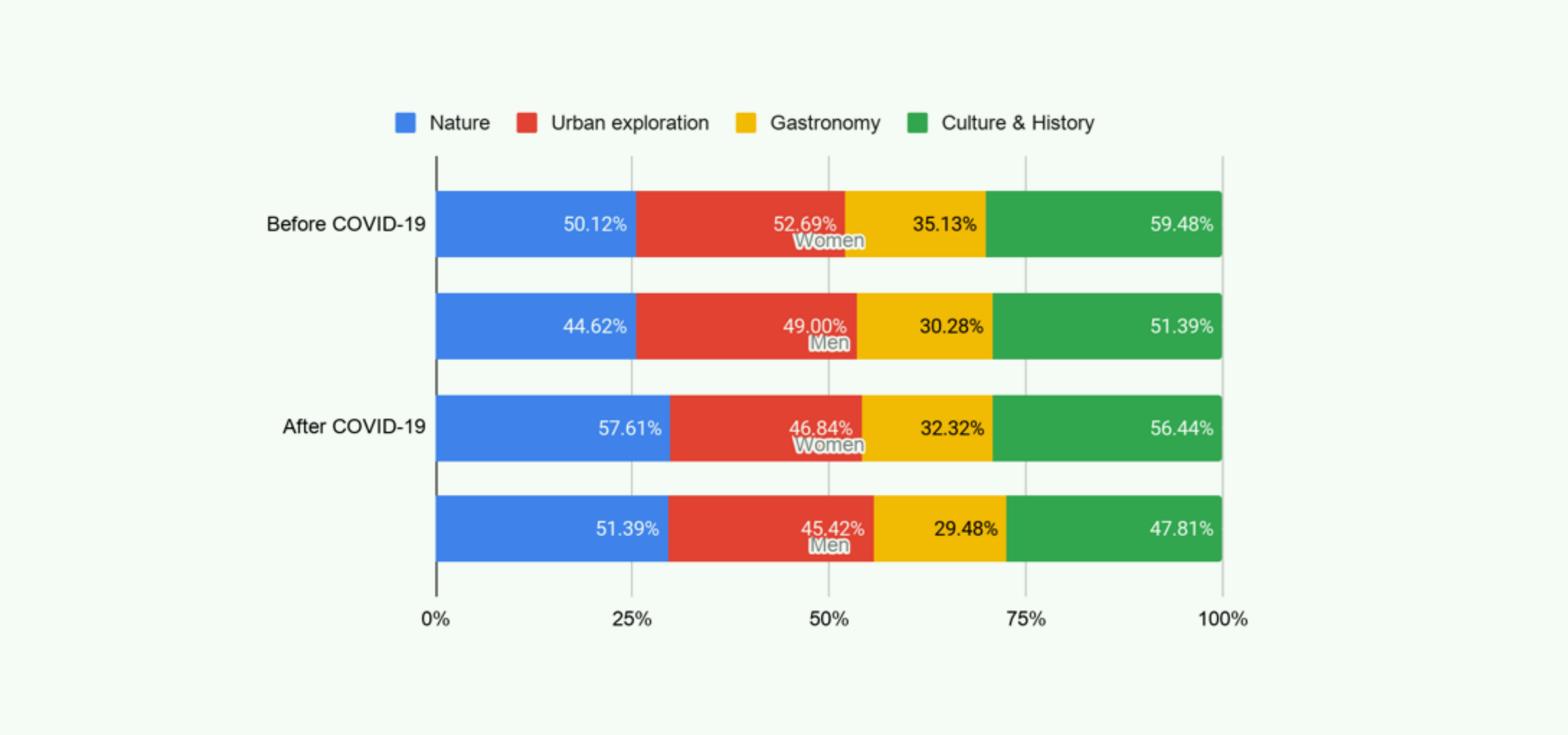

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Figure 58.- Survey Results: Alternative Activities by Region

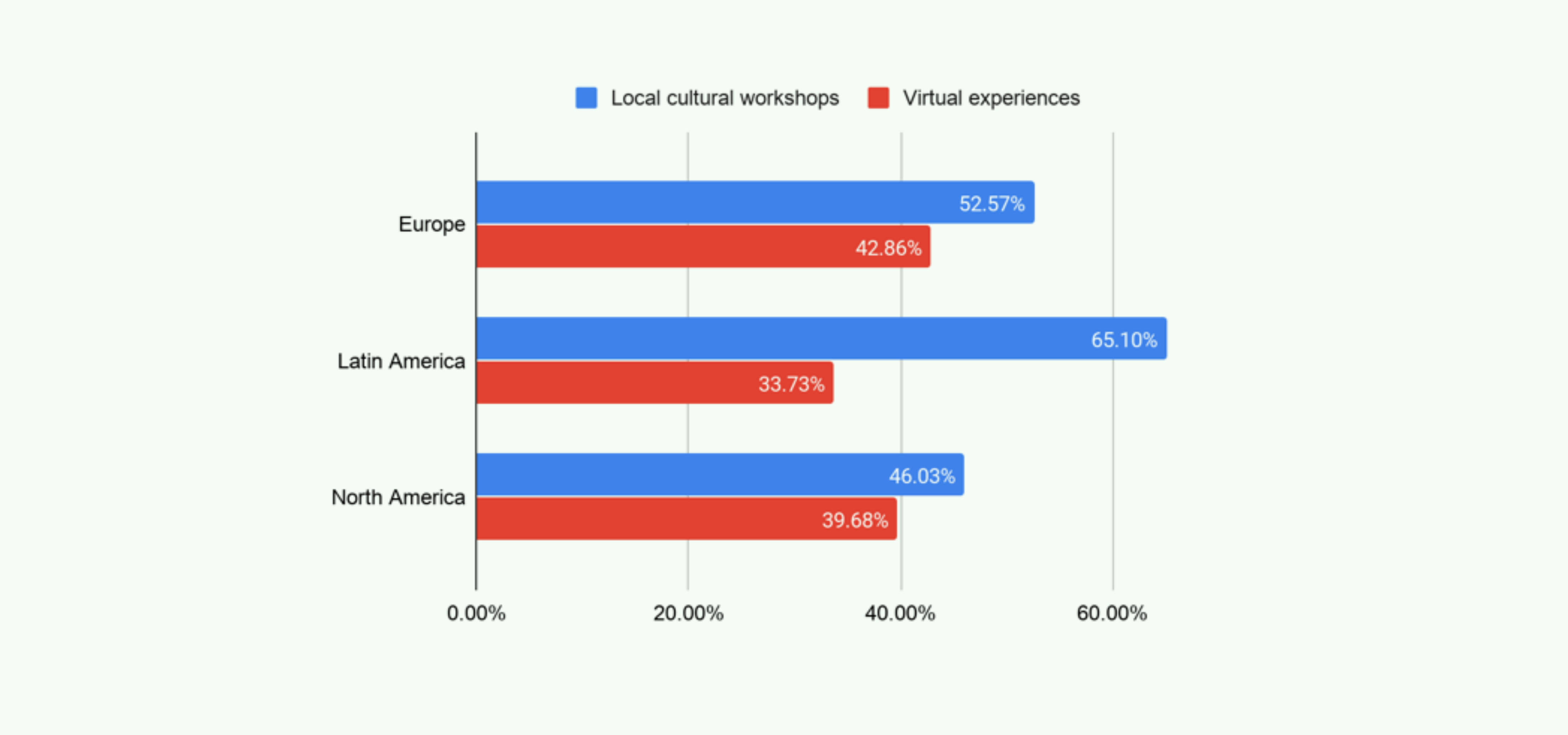


Figure generated by the author, through the platform Survey Sparrow

Concerning gender, it was found that **women will be more eager to try alternative experiences after the global pandemic ends**, as they are more willing to participate in local cultural workshops than men (59.25% vs 52.19% respectively), as well as to try virtual travel experiences (41.69% vs 33.47% respectively) (Fig. 59).

Figure 59.- Survey Results: Alternative Activities by Gender

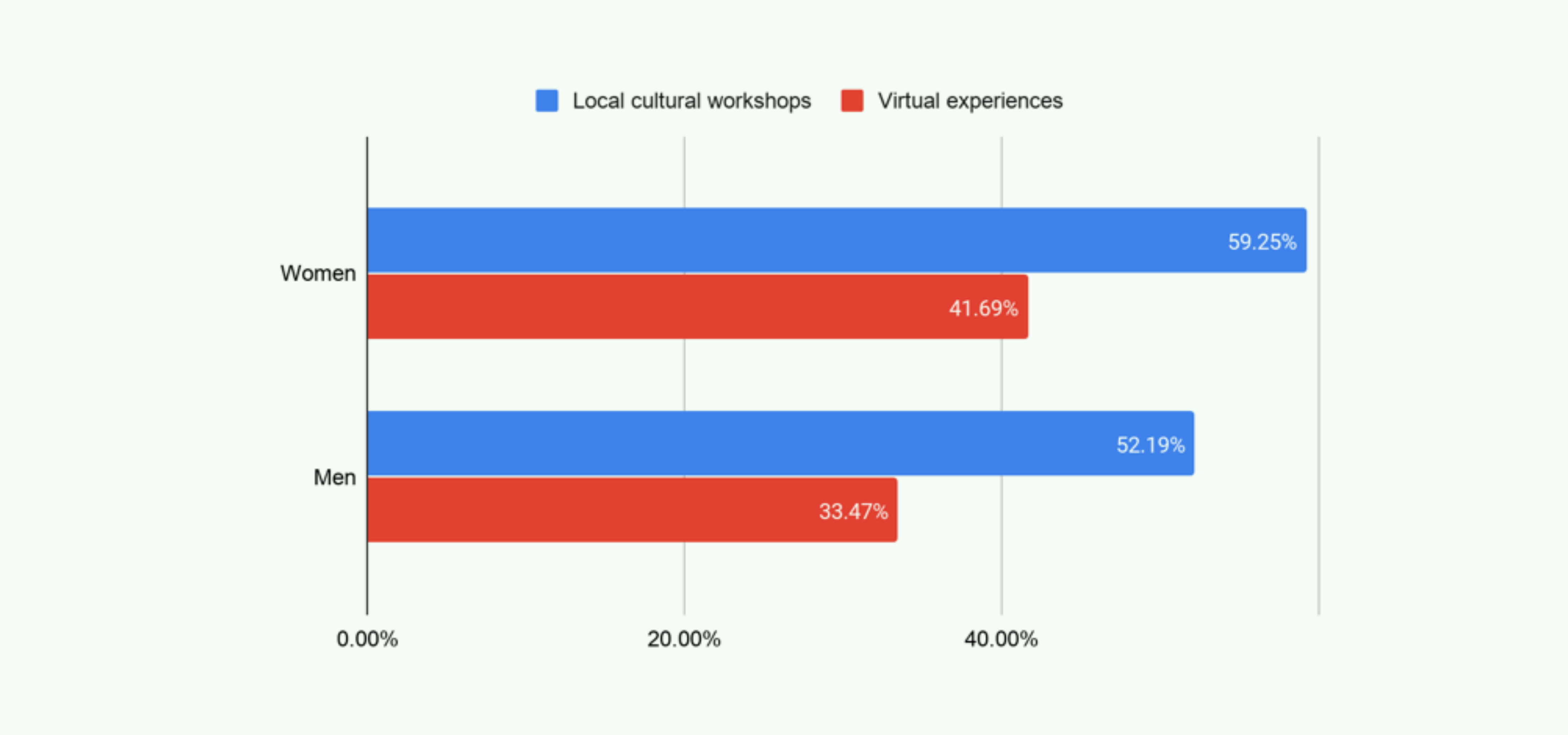


Figure generated by the author, through the platform Survey Sparrow

Conclusion

In some aspects, **participants answered questions similarly for all time periods mentioned, particularly their way of planning travel** (with independent booking remaining the main format), the primary form of **preferred transport** (travel by plane), and **the people they may or may not travel with** (with couples staying at the top).

Simultaneously, **other questions showed a shift leaning more towards domestic travel options**. Although most respondents continued to say that they would participate in both domestic and international travel after restrictions are lifted, the second greatest number of responses flipped from international only to domestic only, and the majority of participants stated that they would travel domestically within 3 months of travel as opposed to 6 - 11 months for international plans.

Additionally, **a rise was seen in participants intending to plan future trips involving the interest of natural environments**, rather than the previously preferred cultural & historical and urban exploration options. Based on the results found in this survey, **there is a possibility that within the near future, travelers will return first to experiences marketed domestically or locally**, especially if they involve environments with less crowds.

04

An emerging generation: The Millennials

Daniela Apparente

Although participants of this survey spanned across multiple generations (from baby boomers to Generation Z), the majority fit into the millennial category (61.6%); thus making it relevant to dedicate a full section to this generation. In terms of gender, the majority of millennial participants were female (66.67%), followed by male (31.44%); the remaining 1.89% preferred not to mention their gender.

The majority of millennial respondents were from **Europe (56.74%)**, **Latin America (28.61%)** and **North America (11.82%)**. About 61.47% categorized themselves as employed, 11.58% were autonomous workers, 8.04% were students, 5.67% were entrepreneurs and 13.24% were unemployed.

Figure 60.- Survey Results: Generations

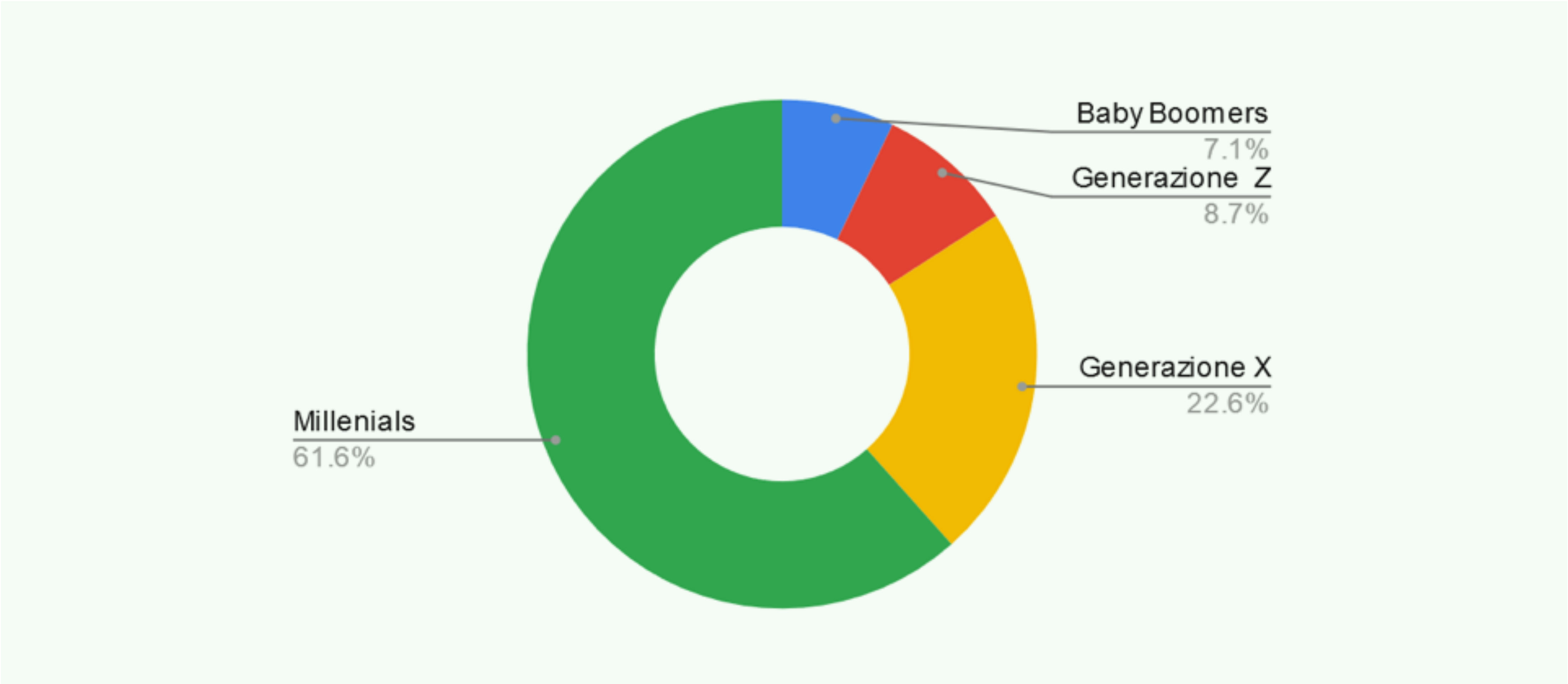


Figure generated by the author, through the platform Survey Sparrow

»»» *Before the global pandemic*

Before the COVID-19 global pandemic, about half of the millennial participants (51.77%) **traveled internationally**. The preferred means of transport was via **plane** (77.54%), followed by **car** (52.48%[7]). They were most likely to travel to **natural areas** (43.97%). In terms of travel interests, there were three main categories which prevailed over the

7. For this question, the survey gave the possibility to provide more than one answer (with a maximum number of two).

others. These categories can be seen in the graphic below.

Participants were given the opportunity to select three of their interests while traveling. The interest that received the highest percentage was **culture and history** (56.50%), followed by nature (53.66%), then **urban exploration** (49.65%).

Figure 61.- Survey Results: Top Travel Interests

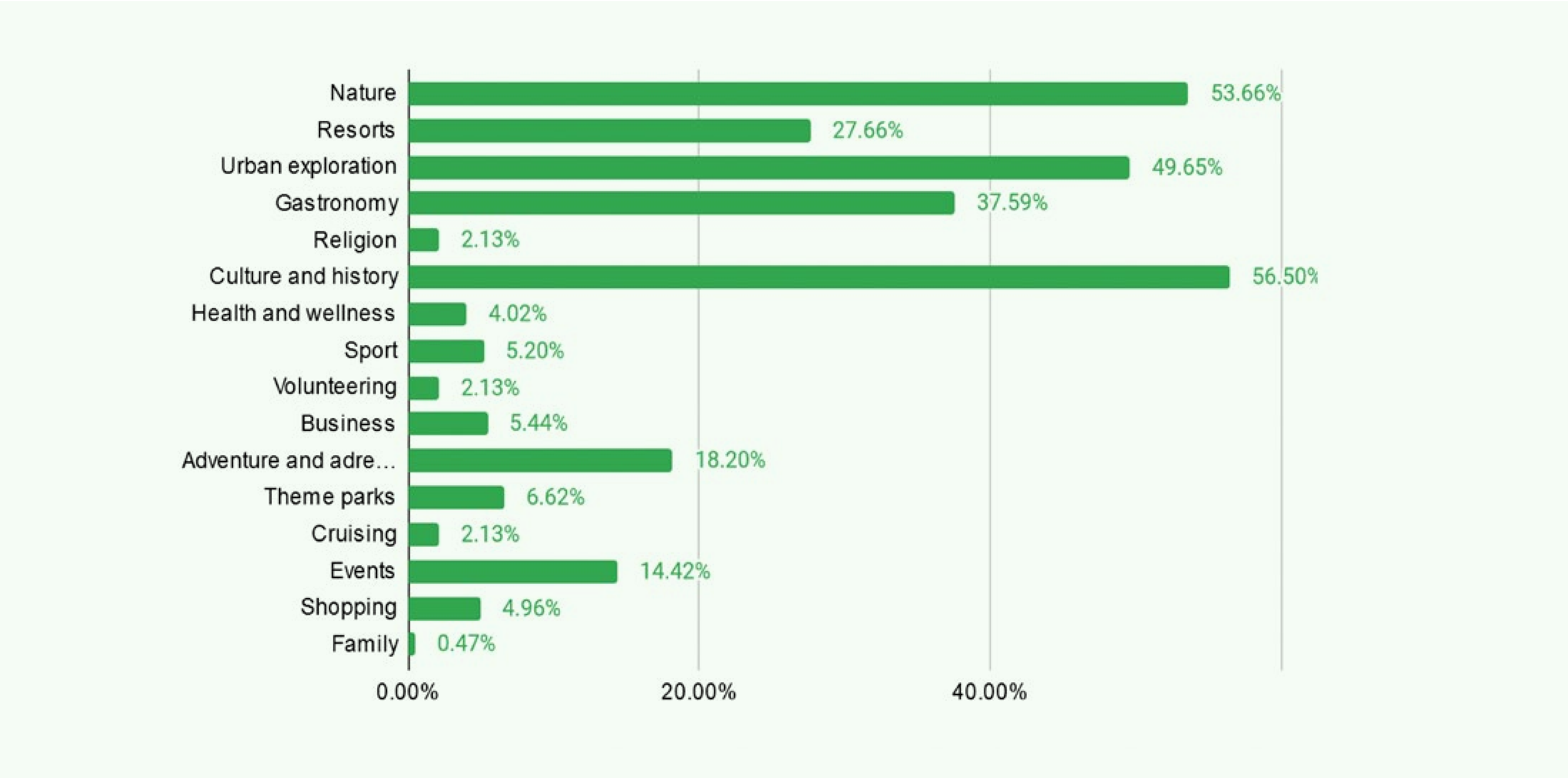
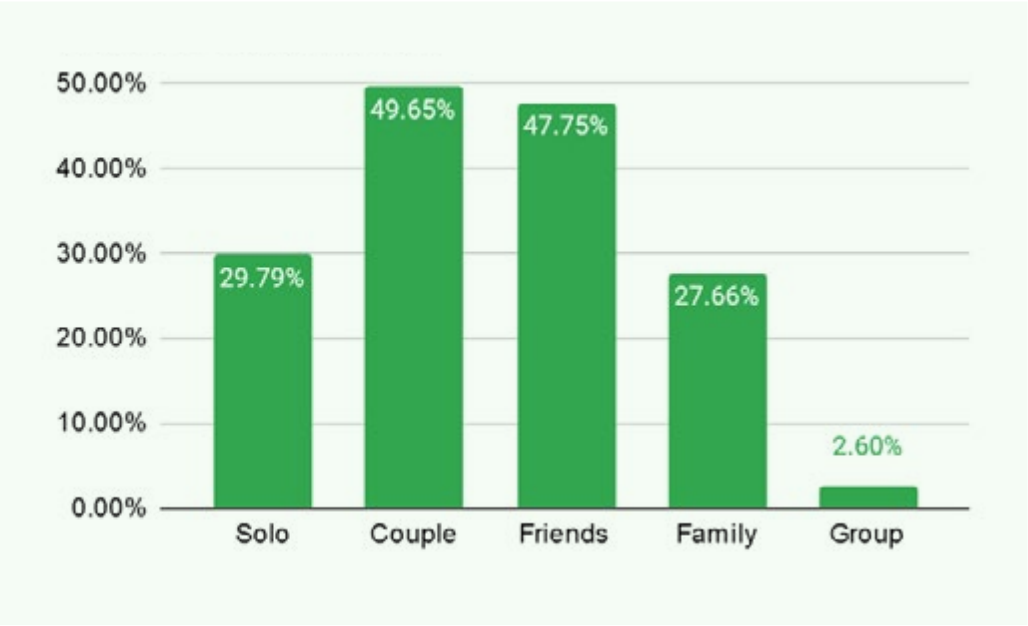


Figure generated by the author, through the platform Survey Sparrow

When it comes to travel arrangements, Millennials proved to be extremely **independent**, as 86.29% did not make use of tour agencies or other offline tools and services. Furthermore, they primarily preferred to travel **as a couple** (49.65%) or **with friends** (47.75%) prior to the pandemic, and they were least interested in traveling **with a group** (2.6%).

Figure 62.- Survey Results: Travel Companions



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»»» *During the global pandemic*

This section of the survey aimed to understand how the global pandemic affected Millennials' previous and future travel plans. About 77.07% **planned to travel** in 2020 and many had already planned at least **3 trips** (40.15%) for the year. Almost half of these planned trips were **international** (46.01%) and the majority were for **personal** reasons (74.54%), as opposed to being for **business** (2.15%).

As of April, 2020, 79.14% of participants had their **trips canceled due to the COVID-19 pandemic**; however, 81.47% were already willing **to reschedule** them before the end of 2020, if possible. 65.01% were willing to book a new trip to another destination if a **discount** was offered. Additionally, 72.81% of millennial participants said they would be more likely to book a trip or a touristic experience with a company that had **COVID-19 related health and safety certifications.**

For the travel plans that were cancelled, 26.64% of millennial participants marked that they had **received a total refund** of the money spent, while the majority did not specify any kind of solution offered (39.38%). When asked what would be the most preferable solution for a cancelled trip during this time, the majority of the millennial generation marked that a **total refund was the most appreciated option** (68.01%), while only 25.42% found a voucher (worth the amount already spent) to be used with the same company at a later time to be acceptable.

Among the other solutions offered, only a few marked that they would turn the money spent on a cancelled trip into a donation, in particular for **organizations supporting necessary workers or providers and non profits fighting the virus** (7.64%) or made directly to **hospitals or healthcare providers** (6.44%). In comparison to millennials, the generation that would more likely turn the money spent into a donation for NGOs and COVID-19 hospitals appeared to be Generation Z (10.17% for each of the two options suggested).

Figure 63.- Survey Results: Preferred Alternatives for Cancellations

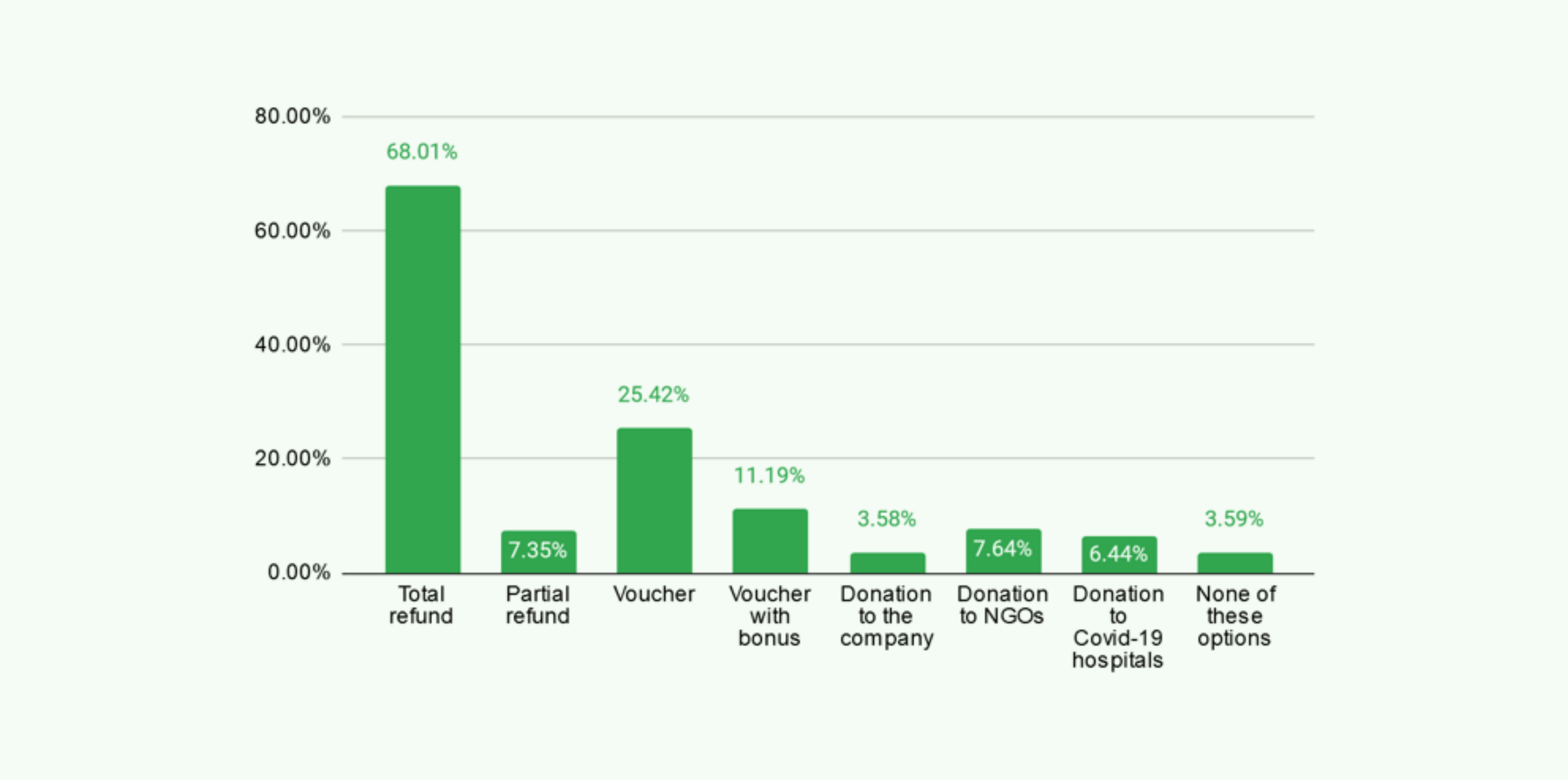


Figure generated by the author, through the platform Survey Sparrow

Figure 64.- Survey Results: Travel Concerns Related to COVID-19

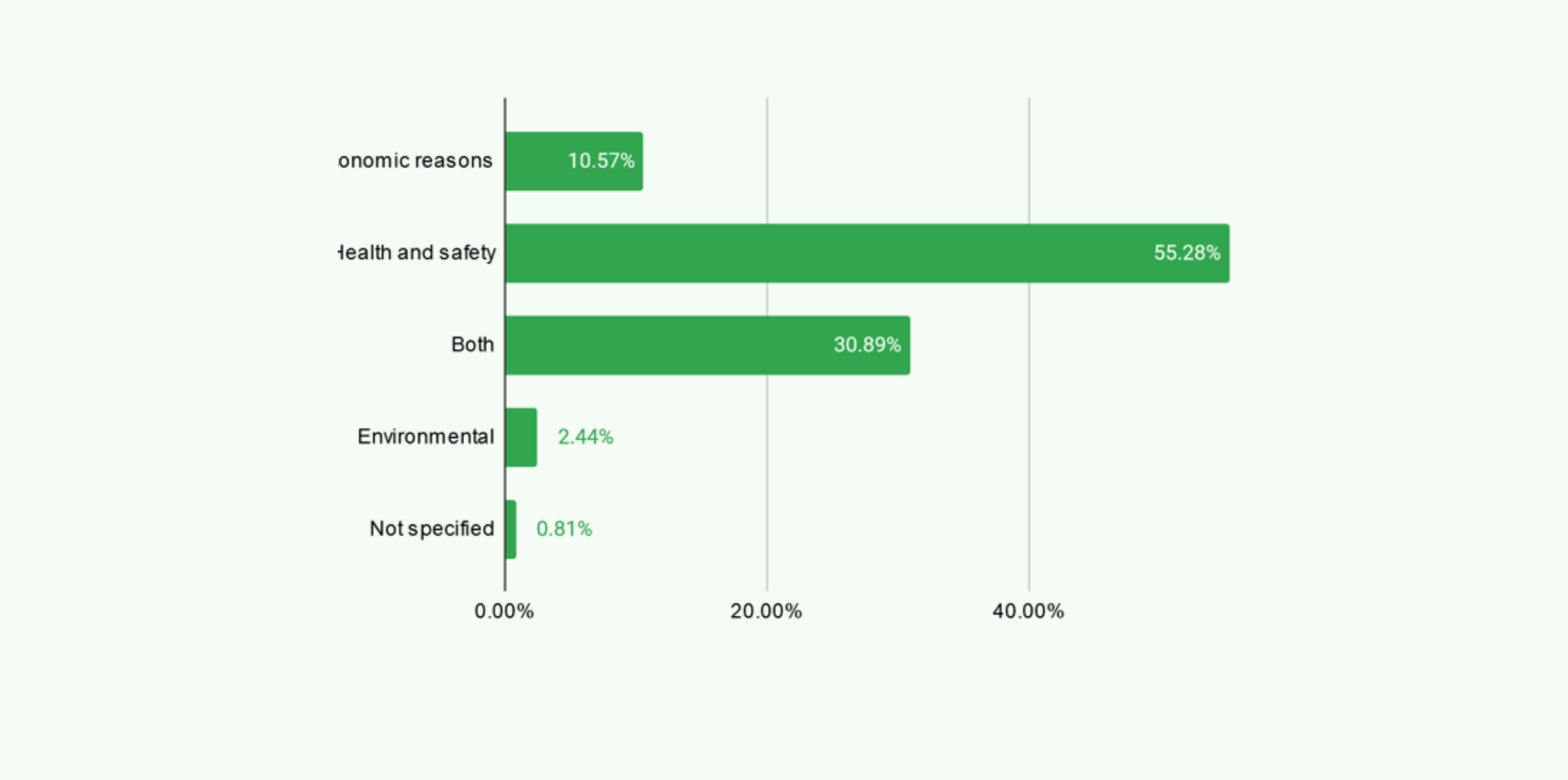


Figure generated by the author, through the platform Survey Sparrow

Due to the stay-at-home restrictions imposed across different countries, tour operators and organizations began offering both free and paid virtual tours and events. As of April, 2020, only 22.93% of millennial participants had participated in a virtual tour or other online experiences while 35% of Generation Z had participated.

Overall, the COVID-19 pandemic negatively impacted 29.08% of the millennial participants' **desire to travel**, as they showed to be the generation whose travel decisions were the least affected by the current situation. Out of this percentage of the 29.08%, 55.28% marked that this was due to **health and security concerns**. Despite its minimum relevance in terms of percentage, another category emerged, as the conservation of the **environment** was written in by several participants. About 2.4% of Millennials answered that they would rather avoid traveling for a long-term period in order to preserve the positive effects that human isolation was giving the environment. There were participants that wrote that this choice lies in waiting for destinations and governments to structure a plan based on de-touristification of some areas. As an example, the city of Venice was mentioned, as the level of water and air pollution had benefited due to the absence of tourism and industrial activities in the area.

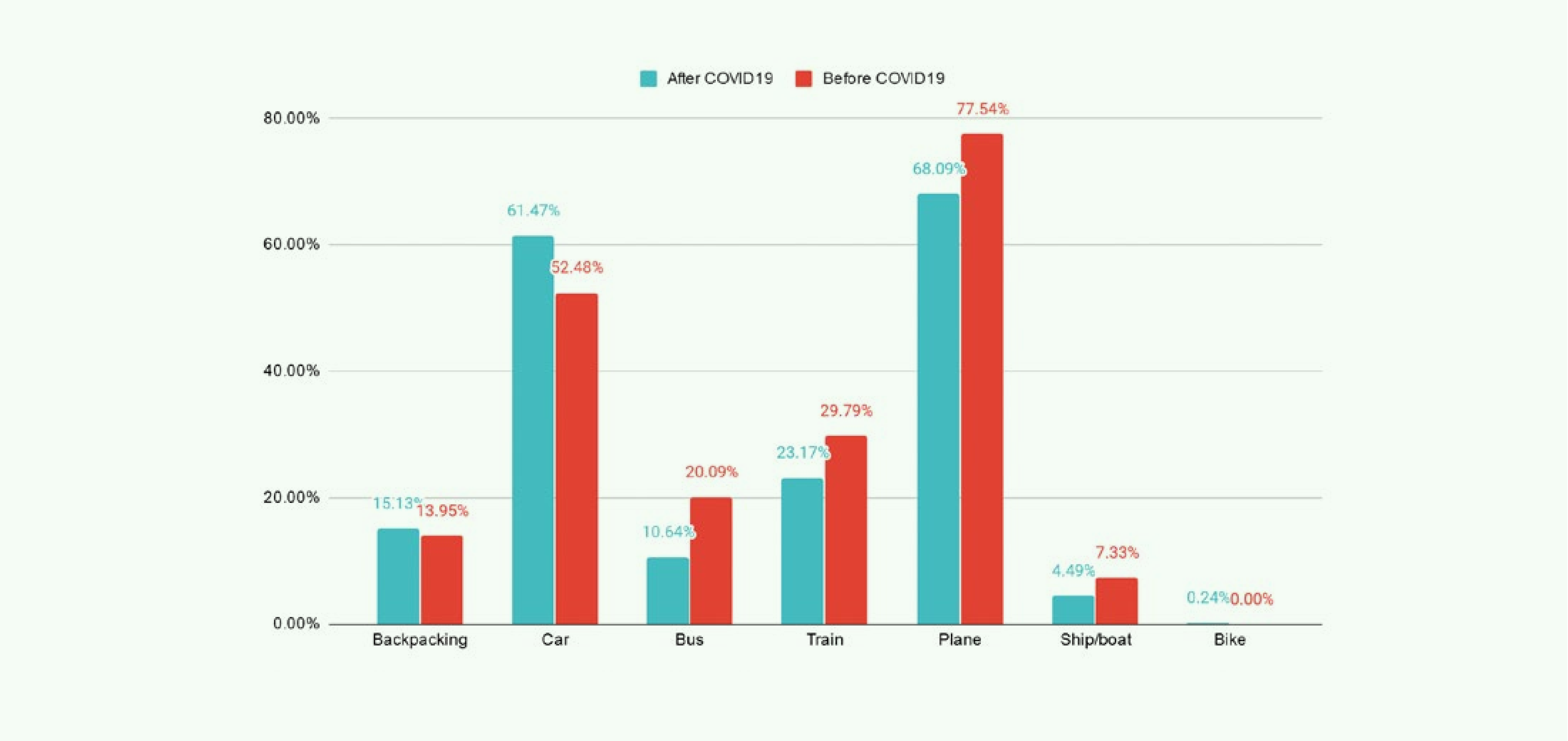
»»» *After the global pandemic: a look to the future*

The results given by the survey revealed some changes in the data related to the pre-pandemic period, highlighting how Millennials' behaviour has been affected by the global spread of COVID-19.

Once the status of quarantine and other restrictions have lifted, less millennials stated that they will prefer to travel to big cities (shifting to 25.30% as opposed to the previous 35.93%); instead turning their interest to natural areas, favoring outdoor experiences and trips (60.99% vs. the previous 43.97%). Despite only 22.93% of Millennials having participated in virtual tours and streaming events during the lockdown, after the end of the quarantine as much as 40.43% would travel to a destination that hosted virtual events.

Once the travel bans lift, the majority of millennial participants marked that they will still travel both internationally and domestically (rising from 52.08% to 52.72%). The most preferred means of transport was still by plane, however the percentage decreased by almost 10% (from 77.54% pre-pandemic to 68.09%), and the second highest option, by car, increased in popularity (from 52.48% to 61.47%). In terms of public transportation options, a decrease was also clearly visible with travel by train falling from 55.89% to 45.26%, and travel by bus falling from 42.1% to 20.37%.

Figure 65.- Survey Results: Mode of Transport



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In terms of the travel companions, the millennial participants marked that they would still prefer to travel with a partner (as a couple raised to 58.03% vs. the previous 49.65%) or with friends (raising from 47.75% to 48.33%). In relation to travel interests, a shift was seen from preferring activities that could be found in cities and towns, to those found in natural environments. In fact, nature became the leading interest (rising from it's second spot pre-pandemic with 53.66% to 59.57%), followed by the previously preferred culture and history (from 56.5% to 53.9%) and urban exploration (from 49.65% to 43.97%).

Figure 66.- Top Travel Interests

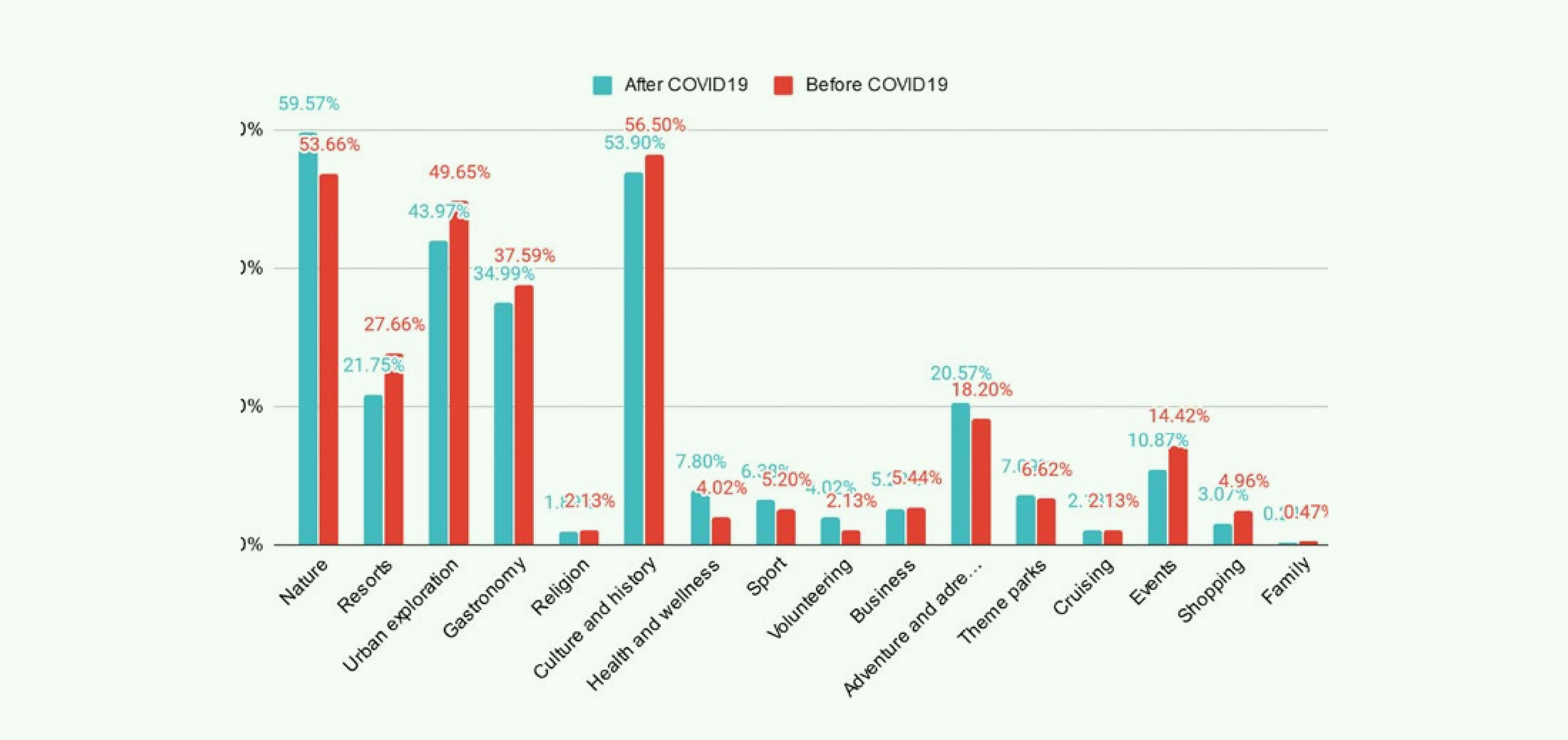

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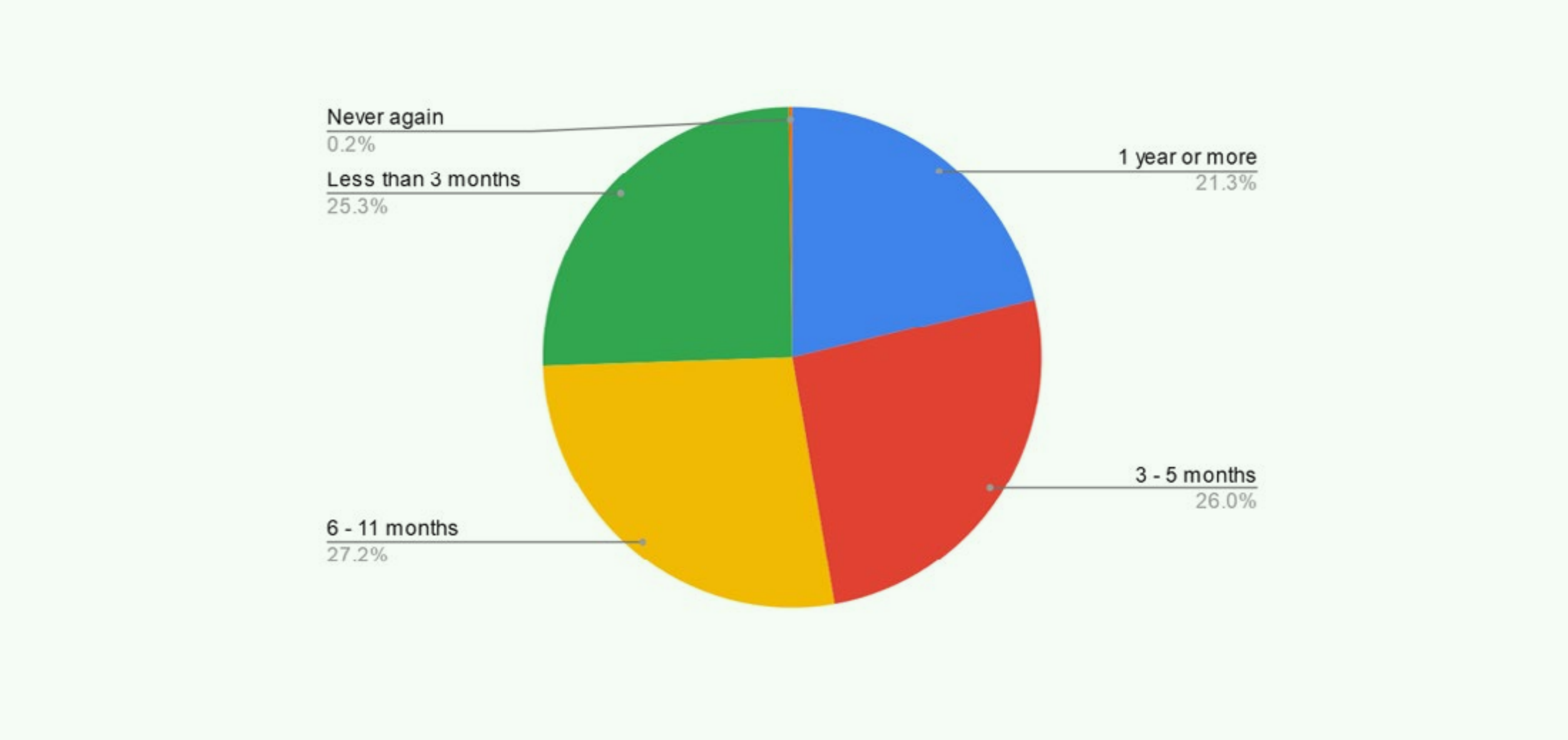
Figure 67.- Wait Time to Travel Internationally



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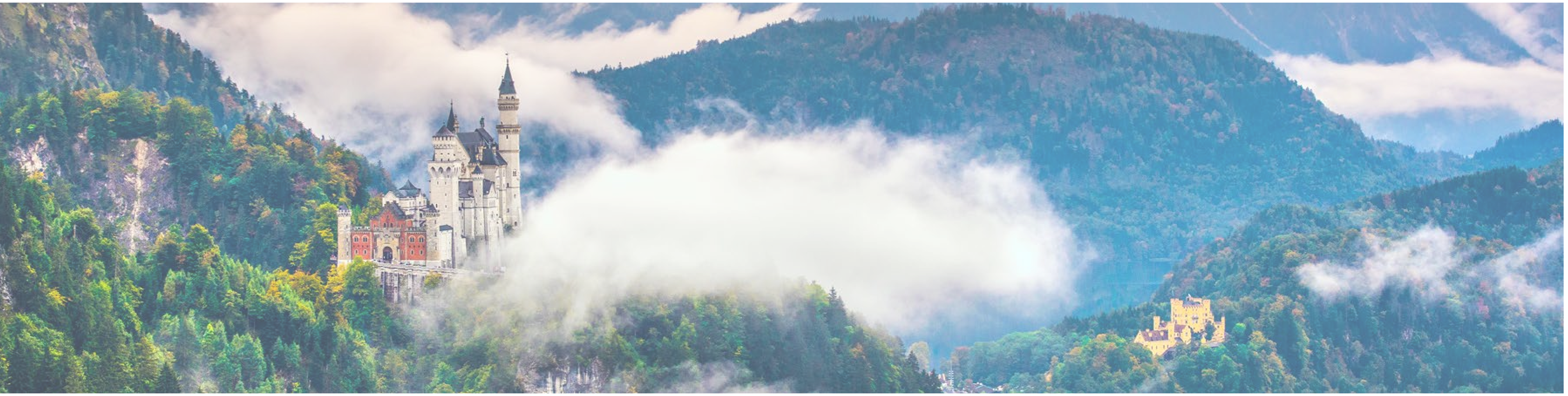


When it came to the amount of time that Millennials will wait before traveling internationally (after the end of the quarantine status), there were minimal differences between the options suggested *(less than 3 months, 3-5 months, 6-11 months, more than one year, never again).*

When asked how long they would wait before traveling domestically again, the vast majority (59.34%) would not wait more than three months after the end of the quarantine status, where travel was permitted.

Figure 68.- Wait Time to Travel Domestically

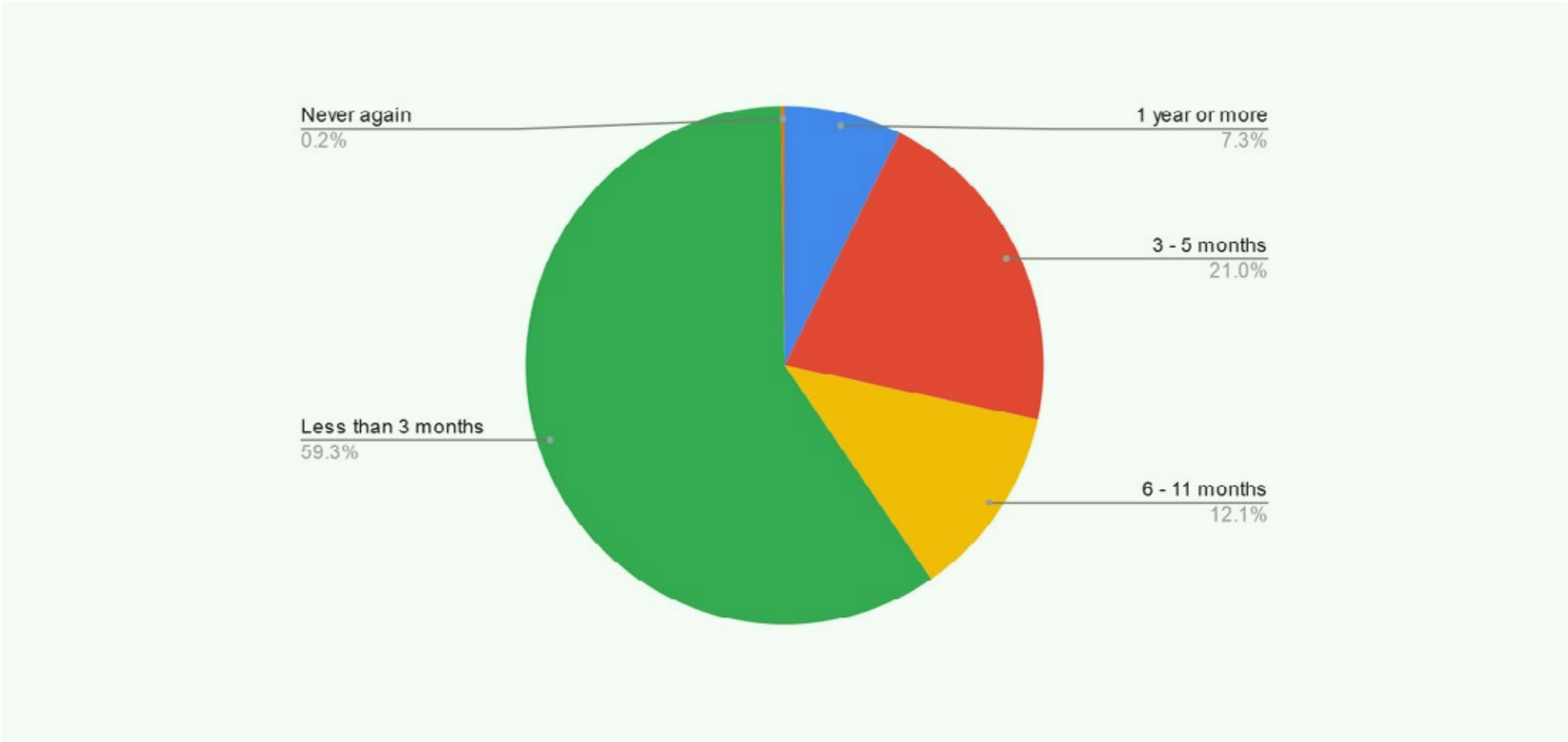


Figure generated by the author, through the platform Survey Sparrow

Based on the survey, tourism's future demands focus on domestic experiences and destinations. All participants in the survey were asked to express their level of interest in **workshops about local traditions and culture** in a domestic destination on a scale from 0-10. Among the millennial participants, 69.16% declared a high interest (7-10) in this.

Findings and Recommendations

Introduction

Diana Garcia Trujillo

"When written in Chinese, the word 'crisis' is composed of two characters. One represents danger and the other represents opportunity."

John F. Kennedy

Tourism has been considered one of the largest industries worldwide due to its capacity to stimulate economic growth, create jobs and spread -directly and indirectly- its benefits to the societies and territories where it is developed. When managed and approached so as to overcome social, economic and environmental challenges, it is a powerful tool for achieving the sustainable development goals (SDGs).

This is not the first time that the tourism industry has been affected by outside events; such as natural disasters, socio-political crisis, terrorism attacks and disease outbreaks; however, never before has the sector been exposed to a crisis of the magnitude of the COVID-19 pandemic. From free and open travel, the whole planet has undergone travel restrictions, placing tourism at risk worldwide.

While it is true that travel bans, border closures and quarantine measures have completely endangered tourism; it cannot be disregarded that the restrictions imposed due to the pandemic have contributed improvements in air quality, the regeneration of nature and the reduction of CO2 emissions; in addition to de-stressing cities and destinations overwhelmed by overtourism. Therefore, this situation could be viewed as an opportunity for businesses and destinations to stop and reflect on how they have been performing in relation to the SDG; and to transform their tourism models and strategies towards a more sustainable sector.

Based on the research and survey that have been conducted herein on tourism and the COVID-19 pandemic, we are proposing a set of strategies, at the Private and Public level, with the aim of supporting tourism businesses and destinations on a recovery path aligned with the SDGs - specifically goals N. 1 (No poverty); N.3 (Good health and well-being); N.8 (Decent work and economic growth); N.9 (Industry, innovation and infrastructure); N.10 (Reduced inequalities); N.11 (Sustainable cities and communities); N.12 (Responsible production and consumption); N.13 (Climate action); and N.17 (Partnership for the goals).

Last but not least, since a sustainable approach can be used as a roadmap to overcome this tourism crisis, destinations should start measuring their success not only by tourists arrivals, but also by their ability to achieve the SDGs, by guaranteeing the health and safety of local communities and tourists, and by being prepared with action plans and measures to face possible outbreaks in the future.

01

Private initiatives and strategies

Daniela Apparente

»»» *Recovery through development: Touristic circuits and “micro-tourism”*

The results obtained from the survey alongside travel restrictions issued in destinations show that domestic tourism will be key in restarting the tourism industry. Efficient initiatives and innovations in the tourism sector could contribute to economic recovery.

The time period post COVID-19 could present a lot of opportunity for restructuring and innovation within existing or start-up travel companies, although uncertainties about future supply, demand and restrictions could propose challenges. This time period could be challenging due to people traveling less along, decreasing spending power amongst travelers and possible higher expenses than present earnings. It could also serve as an opportunity if there is the possibility of making small investments along with utilizing the opportunity of connecting **resources and people.** Tourism operators will have the chance to transform the sector into a tool aimed at **developing local communities and protecting the natural areas** of their regions and nations. There has never been a better time and opportunity for focus on sustainable tourism.

Developing round-trip circuits and **micro-tourism** can be a simple, flexible option from which to start developing new products. Based on the survey results, this could be most effective at a local level.

The word “circuit” indicates a path divided into different stages, linear (tour) or circular (round-trip. Circuits can be categorized by a **specific theme**. It should include the use of **local resources** and the creation of **local workers’ team** whose “unique selling propositions[8]“ (“USP”) acknowledges the territory’s topics of interest. These topics can be gained through traditionally non-tourism related professional activities and daily experiences.

Micro-Tourism - refers to **small groups** of travelers moving through **villages, towns or natural areas** inside a district or a specified region. In addition to having a cultural, historical, artistic or natural attraction, micro-tours should be **characterized by sustainable production and consumption.**

These small-scale offerings may also more easily facilitate and promote the correct application and monitoring of **safety standards** strongly suggested by governments and international health institutes.

Circuits based on micro-tourism can be developed across continents and cultures, focusing on specific areas and contributing to the stimulation of local economies. Two fictitious examples will be described below. These were designed with two different factors in mind, social and environmental.

Examples 1 and 2 are suggested itineraries created by the author (Daniela Apparente) based off of this current research. These specific examples are not applicable in every destination globally, but are here to serve as examples of how to formulate new tours based on the suggestions above.

8. The term unique selling proposition (USP) was coined by television advertising pioneer Rosser Reeves from Ted Bates & Company. It indicates an inimitable benefit naturally owned by a company, service, product or brand that differentiates it from competitors in the same sector.

Example 1

“Chasing ghosts”: exploring abandoned villages

› **Theme: History**

Each abandoned village has a historical background, involving natural disasters, conquest campaigns or even wars that can be highlighted

› **Focus: Social**

The goal is to have a positive impact on local, small economies surrounding said villages by developing (in tandem with local communities) new activities and creating job opportunities.

› **Area: A region within a country**

If successful in a small region, this circuit could evolve to connect different regions inside the country.

Mobility

The tour would be mainly biking, but this kind of tour can be done also by car or even backpacking. Public transportation was not taken into consideration, because of the future tendencies highlighted by the data collected in the survey related to this example. The means of transportation can change according to the kind of experience a company wants/can manage and offer. Below are examples of alternative means of transportation.

Bike

If the circuit is made by bike, it can either be provided by the company, as rental (justifying a little increase in the price), or it can be the required form of transportation.

Caravan

Using a caravan involves the organization of a multi-stage trip. The driver can be a tourist guide or another specialist involved in the experience. This would require a small group, under 10 people. The caravan must have a few bunk beds and bathroom service, while a kitchen is advisable but not mandatory (it can be imagined like a reduced, moving hostel). The quantity of caravans varies according to the financial resources available for this investment, but also on the basis of the quantity of circuits that are planned. Eventually, the maintenance of the caravan must also prove to respect health and safety standards, due to the global pandemic;

Backpacking

Backpacking circuits can vary in the durations of days, from 2 days plus. In general, by choosing different kinds of transportation, entrepreneurs and companies are able diversificate the business, and offer different kinds of experiences and packages.

Resources:

A Local Team

The person in charge of guiding people in their travel experience has to be a local, with a proper background in tourism and/or historical, cultural and humanistic disciplines. If not possible, a tourist expert can be accompanied by a specialist in the sector. The host can meet specialists throughout the circuit. Having destination specialists would lead to the hiring of more people and the spread of greater economic growth, especially in areas that do not have easy access to the labor market. In addition, this would contribute to the rejuvenation of certain areas and speed up economic recovery, innovation and local development, as well as building a more widespread network of professionals in the sector with transversal skills.

Local Connections

Overnight stays offer the chance to support small, local businesses such as bed & breakfasts, hostels and homestays. Meals can be provided by the company (including in the package daily meals booked at local restaurants) or suggested. Partnerships with local establishments can be explored, offering discounts and incentives.

Transportation

To be decided according to the business strategy.

Mobile Application

The app could work as part of a communication strategy and/or a necessary tool during the travel experience. An application could include a list of different circuits available, pictures and descriptions, feedback, FAQs, offline maps and customer service.

Example 2

“Art is trash”: the sustainable art of reusing

› **Theme: Art**

Destinations can be an attraction based off of the artists that have previously or are currently creating there.

› **Focus: Environmental**

Plastic waste is one of the most dangerous threats of current times, but there are also other types of trash that highly affect natural ecosystems. The main goal is to promote cleaning actions in certain areas and to reuse what is collected and turn it into art.

› **Area: District**

This type of tour can be done in one destination or multiple over a course of days.

› **Mobility**

Walking

Walking is suggested, however, different ways can be used for this circuit or tour.

Backpacking

A round-trip tour like this can include a coastal path or overnight.

Bike

Bikes can either be provided by the company, as rentals or they can be brought by participants.

› **Resources**

A Local Team

The person in charge of guiding people in their travel experience has to be a local, with a proper background in tourism and/or historical, cultural and humanistic disciplines. If not possible, a tourist expert can be accompanied by a specialist in the sector. The host can meet specialists throughout the circuit. Having destination specialists would lead to the hiring of more people and the spread of greater economic growth, especially in areas that do not have easy

access to the labor market. In addition, this would contribute to the rejuvenation of certain areas and speed up economic recovery, innovation and local development, as well as building a more widespread network of professionals in the sector with transversal skills

A Specialist in Environmental Issues

This specialist is needed as much as the art specialist, as the main focus of the experience is to learn about the environmental issues related to the area of reference. He/She has to be able to make their knowledge "accessible" especially to people who are not educated about the environment, in order to highlight and explain the value of natural ecosystems, the damage caused by pollution, how recycle trash and in which categories it is distinguished, and so on.

Connections with Local Artists and Organizations

Trash collected can be re-used by the tourists to create art projects with a local artist.

Gear

Camping tents or bikes, plus the facilities for storage and cleaning operations.

Mobile Application

The app could work as part of a communication strategy and/or a necessary tool during the travel experience. An application could include a list of different circuits available, pictures and descriptions, feedback, FAQs, offline maps and customer service.

Certification

The tour company can work with associations on getting certifications for environmental efforts. The company can also produce their own certifications for travelers.

Adapting these tours to develop **sustainable pricing strategies** that make the tours **accessible** to different levels of income is suggested.

»»» *Recommendations for developing post COVID-19 travel*

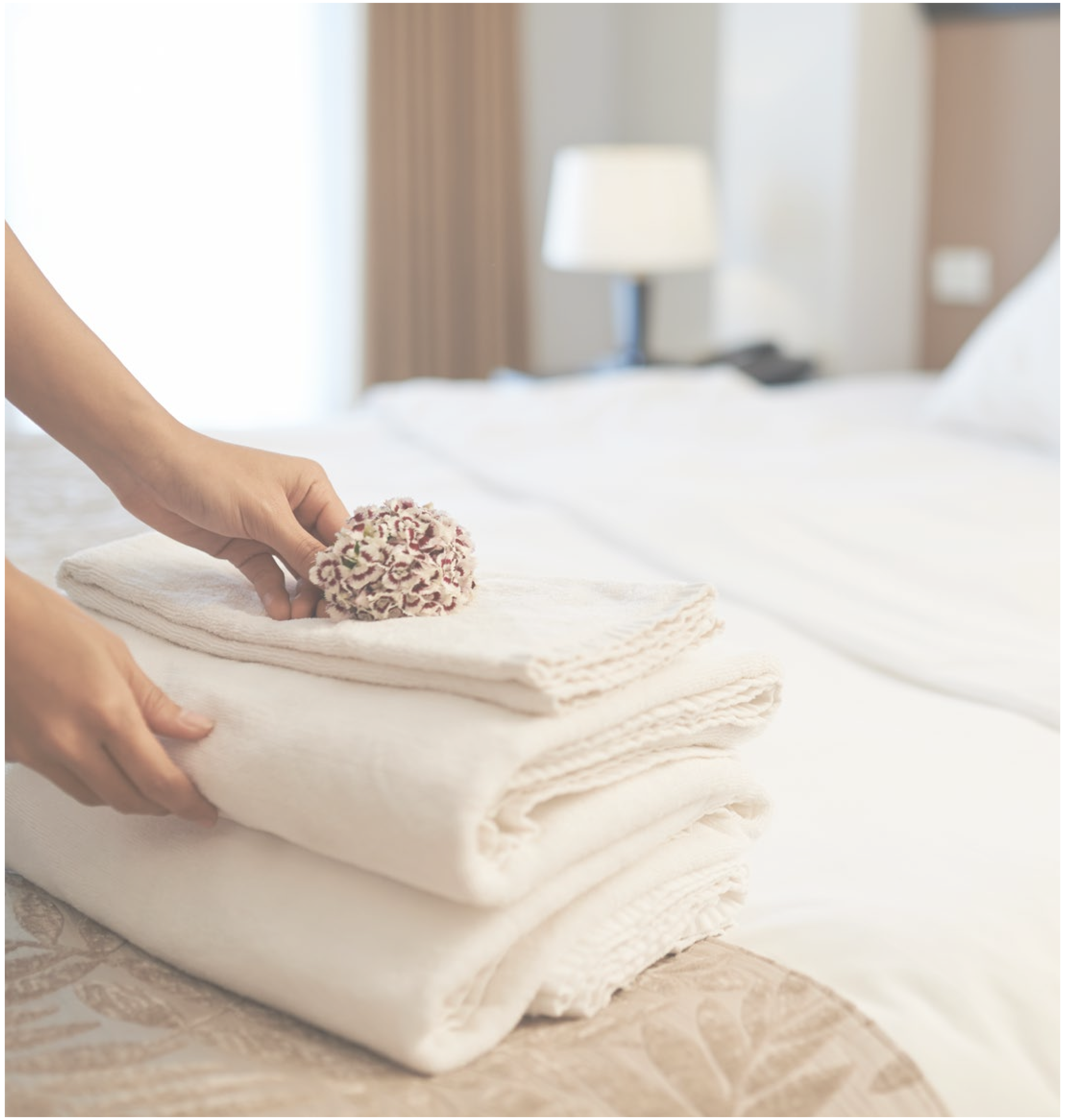
» Post COVID-19 transportation recommendations

Due to the economic crisis, the restrictions introduced by governments and the fear of contagion associated with COVID-19, the use of cars is expected to increase when traveling. Based on the survey results, airplane travel will still be the most sought-after form of the transportation, but the desire to fly will still experience a decline. This could be associated with various factors such as the increase in prices, the lower availability of routes and health anxiety. There was decreased desire by participants to use public transport, like buses and trains, as well.

As mentioned in the first part of this research, the global pandemic has brought an unexpected, positive impact on air quality. Global nitrogen dioxide emissions reduced due to sudden pauses on transport, industrial activities and recreation. This “involuntary” result can be maintained and improved by implementing restructured business models and policies. The switch to electric cars and an expansion of the offer of tours and experiences by bicycle or on foot (backpacking) allow us to broaden the target audience and influence future trends. To achieve these goals, governments and other international institutions tend to promote and facilitate this type of “green” investment within the offer of “ecobonus”, that is economic subsidies (non-refundable or with reduced interest rate) in favor of entrepreneurs and companies that decide to have minimal effects on the environment. Tour operators or travelers can carbon offset their trips. This is possible by using existing websites where users can put their data about transportation used, kinds of food eaten and other types of consumption, in order to get the individual quantity of CO_2 emitted for their travels. A self-check habit like this can feed more conscious choices when it comes to consumption, especially when traveling.

» Post COVID-19 recommendations on environmental education

Some natural areas have experienced an influx of waste due to COVID-19. Surgical masks and gloves have been found along some coastal



areas of the Mediterranean, along with other coastal areas. The enormous increase in a short time, in the use of these health safety devices has had a highly negative impact on marine and terrestrial ecosystems. As a reaction to increased waste, the inclusion of cleaning activities in natural areas, accompanied by educational experiences focused on safeguarding the environment, can contribute to diversifying the tourist offers and bring more awareness to travelers. These activities were currently common in educational travel, but the real success can lie in expanding the age range interested in these issues.

» Post COVID-19 recommend health and safety standards.

Based on the survey, increased health and safety standards among travel companies will be a priority post COVID-19. Sanitization of all vehicles and facilities could be expected along with the availability of masks and hand sanitizer. Periodic measurement of fevers, online questionnaires and knowledge about nearby health facilities are suggested. Tour companies should have an incident response team and a clear game plan for if a passenger becomes infected. No contact hotel check-in, limited capacity tours, and additional fees and time for cleaning could all be part of the new industry standards. Depending on the location, certifications and partnerships with health and safety advisors are recommended.

» Recovery through networking: new associations and collaboration

Local actors must be ready to face the new needs of travelers along with the ability to communicate and work alongside other industries. For this reason, **training** is a must in ensuring **safety and trust** to travellers. By building new networks, companies and professionals from the sector can improve their offers and programs and travelers can get a better experience when exploring a destination. For this reason, the development of associations and new collaborations is recommended for the future of tourism.

» Country-based associations

A **country-based association can be established working as a bridge between big political institutions** (such as the United Nations, the European Union, etc.) **and international organizations** (for example, Red Cross). The association would be aware of new policies, trends and facts all over the world, and able to share this knowledge with its associates. This association is imagined as a **private** entity.

Figure 69.- Country-Based Association: a draft

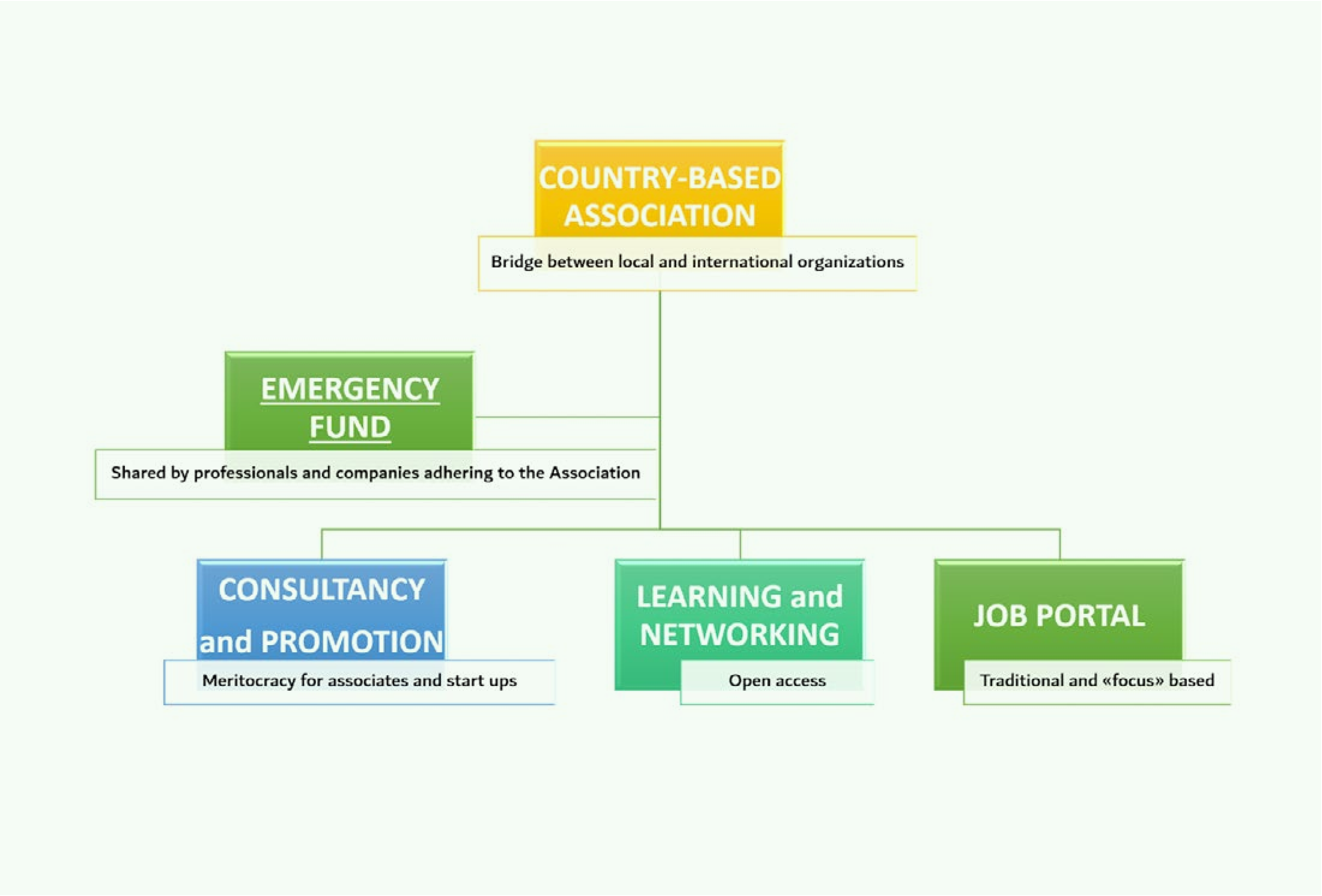


Figure generated by the author

As a private entity, it would need to be economically supported by its members - that means, all the individuals and/or business companies in the tourism sector who want to either participate to the mission and get benefits. An annual fee would make possible two important things:

1. the surviving and proper management of the association itself, and

2. the creation of a shared **"emergency fund",** to be used in dangerous situations (such as: a global pandemic, an economic crisis, the protection of an endangered area or business, etc.) in order to give economical support to those who are part of the association - in addition to other supports which may come from the State or other public actors.

The starting investment might be supported by public or private donors who share the association's mission; by those professionals who are interested in the outcomes and want to be part of the project; by grants offered by national and international organizations.

The main sections can be identified with the associations' goals:

› **Consultancy and promotions**

Two different kinds of consultancy services might characterize the association:

1) **consultancy services on request**, for which professionals and companies that are registered to the association won't have to pay any fee (as they already contribute with the annual one; on the contrary, external professionals or companies must pay a fair fee to get this service);

2) **consultancy for free, as promotion tool not only for companies and professionals making the difference in the sector, but also for the association itself.** Every time there's a new business or a specialist that is developing positive, responsible practices and improving the tourism sector, the association can provide a first, complete consultancy service to boost this initiative. Further in time, the consultancy can be requested

again at a fair cost, or by adhering to the association and becoming part of the network.

Moreover, **promotional activities within the network of the association**- such as online communication campaigns, blog articles, etc. - would be fundamental to spread awareness about the change makers that are renewing the tourism sector. A **yearly award** organized by the association might be another idea to achieve this goal, through an event planned not only to celebrate the successes of the sector, but especially for networking.

› **Learning and networking**

In addition to the above mentioned yearly award, to be organized as a big event, **networking** has to be a constant objective to be achieved through **webinars, online short courses and other inclusive activities** for which different professionals are invited to share their knowledge and their experiences inside the association's network (based on current relevant topic in the sector or requests coming from inside and outside the association's network).

› **Job portal**

The association's website should provide a **job portal where all the offers related to responsible and sustainable tourism are shared.** Those who want to publish a job offer must pay a symbolic fee only if their company is not registered with the association; on the contrary, the service is for free.

As the association is also expected to conduct research within the sector, with the aim to find out new needs or areas of improvement, a non-traditional job portal might be implemented. Professionals who are part of the association would be researching projects which need support, with the participation of different profiles that are not taking into consideration yet; highlights programs with a focus on sustainable tourism, where resources are not enough; suggest new, cross-sectoral profiles that can provide a business with diversified activities.

An advanced state of this idea, forecasts the creation of a worldwide network of country-based associations (as described above) with the same focus: to achieve a complete switch from tourism to sustainable and responsible tourism everywhere in the world.

02

Public implementations and strategies

Diana Garcia Trujillo

»»» *Inclusive governance for domestic tourism development*

Since it is uncertain when countries will lift and ease international travel restrictions and people are more likely to travel within their own countries sooner; domestic tourism should be considered the first measure for the sector recovery.

Governments should work in developing an inclusive and coordinated strategy to foster domestic tourism development which involves all stakeholders, such as local administrations, DMO's, the local community, the private sector and health authorities.

By engaging all stakeholders and having a strategy that strengthens public-private cooperation and partnerships, everyone wins: the local community and destination will again enjoy the benefits that tourism can bring when managed responsibly; and therefore, tourists will have a positive experience at the destination. This strategy should include the following pillars:

» **Prioritization:** Assessing the impacts that the pandemic has had in the destination over the local community, tourism businesses and all actors within the tourism value chain, so that all stakeholders work towards common goals.

By knowing how local tourism has been affected and defining priorities, it will be possible for all stakeholders to work aligned on measures to define a roadmap for local tourism development that can address the most immediate and long term needs that the pandemic has left within the sector.

» **Community welfare comes first:** Domestic tourism could be a powerful tool for local community development and wellbeing, as long as their needs have been heard.

The government and/or local administrations must take into consideration the perception and attitudes of local residents towards domestic tourism development, especially in communities that have been strongly affected by the virus and that before the pandemic felt threatened by mass tourism.

If domestic tourism is to be encouraged, the needs of local residents must be taken into account and must be met; for example, by ensuring the optimum capacity of hospitals, access to food, electricity and water (especially in those regions that were already struggling). Overall, when looking at tourism development, destinations must always place the wellbeing of local residents first.

Also, it is important that as much of the earnings as possible that come from domestic tourism can be returned to the local community, to compensate for the economic loss resulting from the pandemic. Those earnings could also be shared with other sectors such as health and education, so that the local community can have even more access to them. In addition, this could encourage locals to diversify their economic activities, so that they do not become solely dependent on tourism.

Furthermore it is important to assess the kind of impact that domestic tourism development and the implementation of safety protocols would have over the local infrastructure; for example, there could be problems if tourists were more likely to travel by car, needed hospitals, restaurants and other leisure facilities, yet all were constantly full or unavailable due to a reduced capacity. Additionally, it is important to assess the impact that domestic tourism would have over touristic resources, especially for those that would be more in demand (such as natural areas and less crowded spaces); so that a safe carrying capacity could be determined in order to protect fragile environments and the health of visitors.

›› **Guaranteeing health and safety:** In order to regain the confidence of travelers while promoting domestic tourism, the local destination must be perceived as safe.

If domestic tourism is to be encouraged, the government and local administrations should drive efforts and supply resources to make COVID-19 tests available to all local residents, especially to the most vulnerable groups and in very small regions where the spread of the virus could endanger the majority of the population.

Ensuring proper access to healthcare services for both locals and tourists to detect and treat the virus is a must. Now more than ever, if the government and local administrations cannot guarantee health access to residents, it means that the destination is not ready to host tourists.

It is also essential that destinations follow the standards and guidelines enforced by local and international authorities to control and prevent the spread of COVID-19. In the event that a vaccine is developed, governments must guarantee resident access to it and also make efforts to ensure that tourists who visit the destination are vaccinated. Moreover, a clear message of good healthcare and hygiene practices must be sent to both hosting communities and tourists.

Furthermore, it will be the duty of the government, together with local administrations and health authorities, to decide when to open/close a destination to tourists depending on how the case numbers evolve, so that no-one is placed at risk and healthcare resources are not strained.

›› **Protecting employment:** Since the pandemic has placed millions of travel and tourism jobs at risk, domestic tourism can be a tool to re-activate and foster employment locally.

Governments have a duty to protect employment by having strong policies that guarantee job quality and overcome the informality and precariousness that might be present within the sector (such as problems associated with seasonality, lack of social security, expected low wages, etc.).

For instance, in relation to the pandemic, governments must ensure that workers are provided with a healthy and safe workplace environment. Periodic audits and evaluations of workplaces should be conducted to ensure

that guidelines and protocols to control the spread of the virus are followed for the safety of workers, local residents and tourists.

Also, they must ensure that no unfair dismissal takes place if a worker becomes ill. In the event that work activities have to be ceased within a destination due to an outbreak, it should have stimulation packages and measures so that businesses keep their employees and/or provide them with training activities, and cross

training, to gain new skills (for example, digital skills were proven to be essential during the lockdown).

» **Stimulating travel:** By having incentives in place, the government and local administrations could encourage citizens to support domestic travel and tourism businesses, including those businesses managed by/or supporting vulnerable groups that were highly affected by the pandemic.

Similar to the idea behind international tourists being able to get a VAT refund; in order to encourage domestic travel and expenditure to support tourism businesses, a tax exemption for domestic tourists over some tourism goods and services could be implemented. Any specifications for which domestic tourists were applicable for this option could be determined by each destination.

For instance, domestic tourists could have a 75% VAT exemption when staying at hotels, rural houses, and other forms of accommodation; which could also apply on purchases made through travel agencies, tour operators and other services (such as guided tours, gastronomic experiences, local traditions experiences, etc).

In addition, as vulnerable groups within the sector (women, people with disabilities, indigenous communities, etc.) have been extremely affected; participation in tourism activities or purchases from businesses which are directly managed by these groups of people, or which support them, could be stimulated by offering a 100% VAT exemption to domestic tourists.

» **Promoting sustainable mobility:** The gains that the pandemic brought in terms of decreasing contamination and lessening CO_2 emissions must remain for the health of the planet and its people.

Now more than ever, a commitment from tourism towards reducing and eliminating CO_2 emissions must be stronger for two reasons: our compromise with the planet in climate change, and the effects that contamination and gas emissions have on people's health.

The fear of using public transportation might lead to an increase in the use of private cars to reach destinations and travel within them. It is important that governments and local administrations make bigger efforts to encourage citizens and tourists to opt for more sustainable options.

The use of low impact transport could be encouraged by demonstrating to tourists that it is safe to do so. For instance, this could be done by providing a greater availability of "clean and in good state" bicycle rentals, either from the public sector or by working in cooperation with private shops; which would undergo cleaning protocols after use in order to prevent the spread of the virus. In addition, if tourists are encouraged to use bicycles, having an increased number of designated, good condition bicycle paths would be a must.

The use of "green" cars could also be encouraged by clearly communicating their environmental benefits. Financial incentives could be developed for private rental car companies to persuade them to mainly offer these kinds of cars and to encourage their customers to use them. In addition, lowering parking fees for those who use zero emissions vehicles could also be implemented.

If the use of public transport were to be encouraged, tourists would need to perceive that it would be safe to do so. Thus, it would be important that all safety recommendations from the health authorities are followed and implemented (in terms of capacity, distance and use of protective equipment). For example, public taxis could need to be fitted with a glass divider separating drivers from passengers and cleaned after every use, or metro trains could place distance markers for passengers on their floors.

››› **Preserving local culture & traditions:** Domestic tourism can present an opportunity to reconnect and return to local environments, value and experience local traditions, and preserve the cultural resources of local destinations.

Given that the pandemic has brought a shift towards local travel, and that there is an interest for cultural traditions, the development of culture-based tourism experiences can be encouraged and supported, especially in regions where there is vivid and strong cultural heritage.

It is important to work together with the local community so that they recognize the value of their traditions, and are empowered to be ambassadors and share their culture with those who visit them with pride. Furthermore, it is important that the government and/or local administrations have in place, or implement, policies and frameworks to protect and enhance the tangible and intangible cultural resources of their regions, so that tourism development and operations will not degrade them.

» **Promoting local production & consumption:** Domestic tourism provides an opportunity to encourage local production and consumption, thus helping the local producers that were most affected within the tourism value chain.

In order to support local producers who were affected by the closure of hospitality and tourism businesses, it could be important that governments place priority on local production as opposed to imported products.

Local administrations should work together with their communities to promote and enhance the value of their products, so that they are consumed by tourists and businesses (hotels, restaurants, etc) within a close proximity; thus maximising the benefits for local producers.

In addition, this creates an opportunity to develop policies to foster circular economy initiatives, which would ultimately result in the efficient use of the local resources within a destination.

» **Digital transformation:** This pandemic has proven the significance of the role of Information & Communication Technology (ICT) and innovation within the sector, which should continue to be built upon and made more accessible to all.

In an era where the use of the internet became essential and people have been highly dependent on it, ICT proves to be fundamental for the effective development of tourism. Therefore, although it is important that governments encourage the development of digital competences and the use of technology at local destinations; it is even more important that they ensure access and proper provisions, even in the most remote areas.

The implementation and development of ICT will allow destinations to reach domestic tourists and distribute their services more efficiently, as well as communicate messages about whether it would be safe or not to travel to a destination.

Furthermore, it would be beneficial to have a digitally skilled workforce within the sector that would be prepared and ready to act in the event of another outbreak.

»»»» *Data driven destinations*

This pandemic has demonstrated the importance of the sector to be data driven and to always measure its “weight” and significance, mainly for three reasons: to demonstrate the importance of tourism and its contribution to the economy and people’s well-being; to monitor and track changes; and to take strategic decisions.

» Being data driven

Data collection, its analysis and subsequent communication is fundamental for tourism to become a priority in governments agendas, to make informed and strategic decisions towards the recovery of the sector, and to develop new products and services according to the new demands imposed by the pandemic. In addition, data collection:

Allows governments and destinations to:

» **Analyse** the impacts that the pandemic and any future outbreaks will have over the sector

» **Assess** how the pandemic has evolved within the destination (whether it is under control or not)

» **Assess** how safe it is to conduct tourism activities within the destination

» **Identify** threats and opportunities for the sector in relation to the pandemic

» **Assess** if the measures implemented for the recovery of the sector are working

» **Assess** if the measures and protocols implemented to control the spread of the virus are working

» **Measure** how well a destination is doing at achieving the SDGs

» **Have** real time data of the destination’s operational capacity, in order to know if it’s ready to respond to tourists’ essential needs and demands.

» **Know** what type of tourists are visiting and what they are looking for (new tendencies)

» **Make** informed decisions to provide a safe environment for both local residents and tourists.

Allows citizens and tourists to:

» **Have** access to official, reliable and updated information

» **Make** responsible decisions on whether to travel or not

» **Know** what is happening within a destination, so that they are more conscious about the impact that their actions might have

» **Build** confidence and trust with the tourism sector

»» Tourism dashboard

With the use of technology, a dashboard that integrates relevant data and indicators in real time with a public-friendly user interface could be developed. This dashboard could be available either through a destination's Ministry of Tourism website or through the organization in charge of promoting the destination, so that it may be checked by everyone interested in finding out such information.

In addition, displaying and communicating this data would demonstrate a destination's commitment towards transparency of information, sustainable practices, and its responsibility in managing the pandemic; hence building confidence with the sector.

»»»»» *Transparent and effective communication*

Transparent, accurate and timely communication must be enforced from the beginning, during and after the outbreak; but it is also everyone's responsibility to keep informed.

It is crucial that the government and local administrations have a communication strategy in place that is consistent, and which provides timely and reliable information for citizens, tourists and the sector regarding the evolution of the outbreak, the measures that are being implemented, and the guidelines and protocols that must be followed. In addition, there would need to be specific information addressing each group:

Table 3.- Different Groups Addressed for a Communication Strategy

Citizens	Tourists	The sector
The importance and responsibility of being and staying healthy Personal hygiene and safety measures Measures implemented to keep their place of residence safe A helpline available only for citizens, if assistance is needed What to do in the event of feeling sick Available hospitals Encouragement to report unsafe practices by either citizens or tourists Available social and economic aids	The destination's new value proposition, bearing in mind that tourists will value destinations that can guarantee their health and safety more Measures implemented to keep the destination safe The importance and responsibility of being and staying healthy prior to traveling and while at the destination Personal hygiene and safety measures A helpline available only for tourists, if assistance is needed What to do in the event of feeling sick Available hospitals The variety of tourist attractions that can be visited and activities that can be done; in order to avoid agglomerations This information should be available in different languages, depending on tourist demographics.	The importance and responsibility of being and staying healthy Hygiene and safety measures to be implemented in hotels, restaurants, tourist attractions, airports, tour operators, travel agencies, etc. Carrying capacity for both natural and man-made tourist attractions Available aids for the recovery of the sector and individual organizations/businesses Changes in measures and regulations as they take place

Furthermore, the role of transparent and effective communication will be key to maintaining the reputation of destinations. It will show that governments, the tourism sector and health authorities are working together, and that the information received is consistent and easily accessible. Not only will this make data more readily available to the public, but having a platform accessible to all key players can keep the flow of information faster and the process of sharing between organizational bodies less complicated.

Last but not least, reliable and transparent communication will project credibility and an image of a destination that is responsible, one that has placed health and safety as a priority. This will also work to build confidence in residents and tourists towards the sector.

»»»» *Crisis management*

» Preparedness

When developing a crisis management plan, all the stakeholders should plan for the worst case scenario (which, in the case of a similar pandemic, should include the likelihood of a second wave outbreak) and which takes into consideration what was learnt from previous situations.

The plan must anticipate challenges the sector and destinations will likely face, propose strategies to reduce the impacts, and assess possible outcomes. In addition, it must be flexible enough to be adapted as the situation evolves, including all protocols and guidelines that are developed.

Furthermore, in order to make sure that the sector and destination will be ready to face the aforementioned established challenges, simulation scenarios and subsequent meetings with the participation of all stakeholders should be implemented. The aim of this would be to collect everyone's feedback, identify what went right/wrong and develop common solutions that would be effective if a real situation occurred.

» Funding

A monetary fund specifically allocated to tourism crises and emergencies could be created. Tax policies related to tourism might be reviewed, so that a percentage of those taxes are destined into said fund in case events occur that place the industry at risk; thus contributing to businesses continuity, protection of employment, and the efficient use and allocation of other resources.

In addition, as the COVID-19 pandemic is a global issue that requires global actions and cooperation, the industry also has a duty to contribute to the solution. Therefore, either a new "tourism fee for health" within destinations could be created, or a percentage of tourism taxes could be allocated to sponsor research on global health issues and industry innovations; ultimately contributing to the achievement of health and safety destinations across the board.

Crisis response network

Each country should have a crisis response network for tourism which has been integrated by key stakeholders from the public and private sector, the local community, academics and health authorities.

This network would have the responsibility of designing the crisis management plan mentioned above, developing the preparation measures, and conducting research on solutions and best practices that could be implemented during events that might endanger the industry. When such events take place, this network would act as a tourism crisis committee to assess the situation; they would implement suitable plans, monitor the effects and impacts on the industry, and communicate the action lines and guidelines to be followed by tourists and the sector.

Global partnerships and cooperation

As a global issue that requires global actions, now more than ever it is important that the industry and destinations around the globe work together. Good coordination and communication among tourism corridors and destinations having similar characteristics would be essential to reach common ground on the recovery of the sector, and to help find solutions for the pandemic. Hence, instead of being competitors, destinations could become strategic partners to enhance safety. They could share what they've found to be the best practices and apply standard measures, then attract more tourists by working on promotional plans together.

Also, a higher degree of public-private cooperation within destinations would be beneficial, as well as cooperation with the health authorities. This should be done in order to set and achieve common goals and implement overall more coordinated management of the destination.

03

Policies and certifications

Daniela Apparente

After the global pandemic, different methods of business will be forced to be introduced. New ways of working are now taken into consideration, such as remote work or smart work. New ways of traveling, as well as trip planning, will change due to influencing factors such as safety standards, prices, timing and restrictions. New ways of seeing the world will push public and private institutions and businesses to be more environmentally oriented, and this trend may now be even more relevant for individuals.

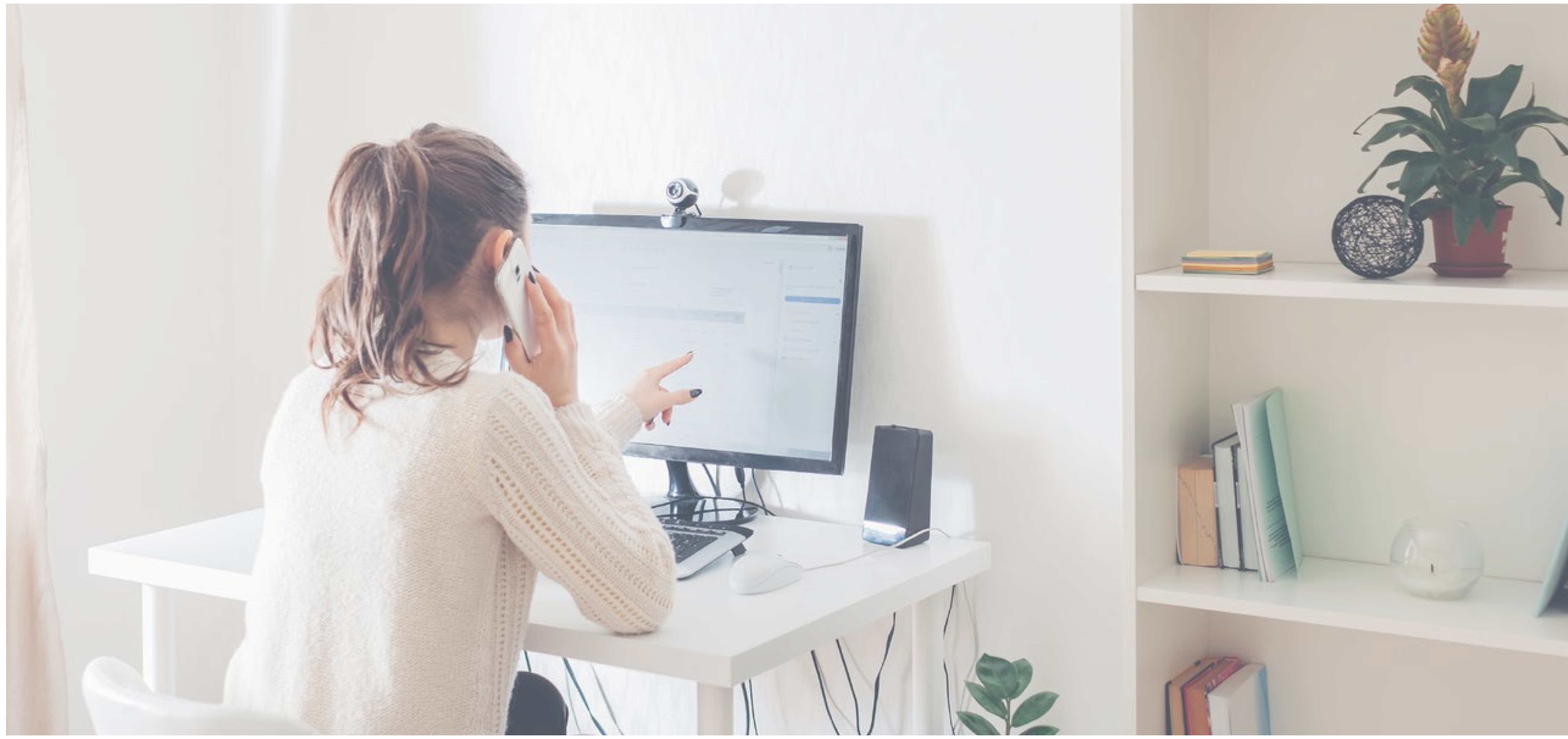
»»» *Mitigation model: Tourism crisis management*

Trust will be the key for the tourism sector - for travelers and professionals:

» **Travelers** have to feel safe when they explore a destination or live an experience. This can be done by being able to "measure" the level of monitoring and the guarantees that are provided by a touristic company or any professional in the sector;

» **Travelers** deserve recognized, immediate and transparent informations sources where to find all the information they need before any trip, without any confusion generated by different sources sharing different contents;

» **Travelers** must be involved in experiences that always have a sustainable and/or responsible focus, in order to acclimate them to certain topics and show them the positive impact they can have doing so little, not only in everyday-life but also when traveling;

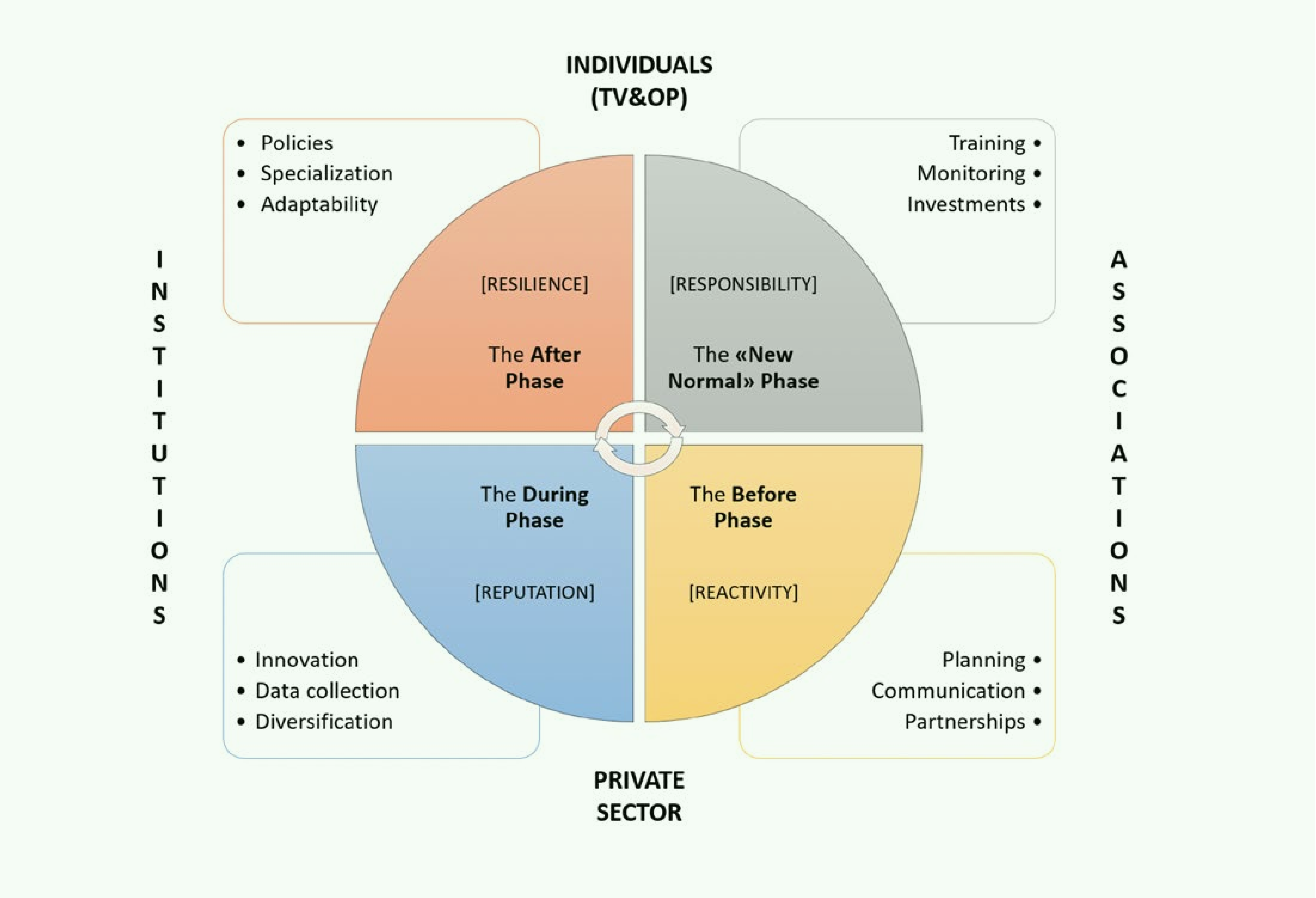


» **Tourism specialists** need to be part of business initiatives, companies or institutions that own the tools to protect them from unexpected crisis (financial, environmental, etc.) and that never exploit their roles, by respecting their working contracts and improving their living conditions;

» **Tourism specialists** have to develop a particular sensibility towards their customers, by creating policies that - during a crisis - can be sustainable economically for all parties involved.

For all these reasons and due to the current state of travel, the entire sector must be ready to face new challenges whenever it will be necessary. The only way to make this achievable is to go through a "mitigation" model to manage futures crises.

Figure 70.- The 4 “R” Mitigation Model



Model drafted by the author

The “4 R” Mitigation Model has been developed within the framework of crisis management. This can apply to businesses, and here narrowed down to a business niche as the tourism industry. The model goes through four different **phases**, always directly interrelated, where each one has a different **focus, stakeholders** and **actions** (related examples refer to a global pandemic scenario - such as the current COVID-19 pandemic).

The Before Phase

» **Focus:** Reactivity

» **Stakeholders:** Associations & Private sectors

» **Actions:** Planning, Communication, Partnerships

Due to previous monitoring operations (see the “New Normal” Phase), it is possible to forecast many scenarios and take action by proper preparing: this is the stage of *reactivity*. All the stakeholders involved in the tourism sector have time to recognize a likely, dangerous situation and start *planning* the counter-measures to survive sustainably (from a financial point of view). The Reactivity Phase is also the right time to *communicate* strategies and/or policies to travelers, employees and all other actors involved in the sector in order to achieve coordinated actions and build proper expectations. It is also time to build *partnerships*, those of which can be very relevant to survive during harder times. That’s why the *private sector* can improve its network with *associations* involved in supporting certain initiatives.
For example, an eco-hostel might offer its spaces to an association involved in environmental issues, to be used as offices when workers must alternate to allow sanitization operations and reduce the probability of contagion. In exchange, the association may provide consultancy services and plan some events for a safer period, to spread awareness about the eco-hostel’s mission and vision, and involve the structure in projects.

The During Phase

» **Focus:** Reputation

» **Stakeholders:** Private Sector & Institutions

» **Actions:** Innovation, Data Collection, Diversification

In the middle of a crisis, most activities and operations stop. Restrictive measures and/or the impossibility to quickly fix damages and problems result in a forced slowdown. This time does not have to be wasted; indeed it can be used to build or strengthen *reputation*. The best way to do it is through actions - what is done and the choices are taken speak for themselves. *Innovation and diversification*, supported by *data collection*, can help to survive during a crisis and amplify income' sources even once the hardest period is over. This is all about evolution, a kind of a business Darwinism which sees the most creative companies surviving and becoming stronger after such a negative period. It is now that companies from the *private sector* can appeal to public and international *institutions* to understand how to deal with the period of crisis, and with what tools are available to them.

For example, a tour operator can do surveys by addressing its usual target, in order to get information and understand how to design future experiences, in addition to customers' expectations. This consequently can lead to the implementation of new strategies. An innovation strategy might include the creation of virtual tours and/or documentary streaming, with the goal of pushing future sales of experiences or destinations. A diversification strategy may focus on the creation of different kinds of tours, aiming to recover the local economy.

The After Phase

Focus: Resilience

Stakeholders: Institutions & Individuals (Travelers And Operators)

Actions: Policies, Specialization, Adaptability

Recovering requires large efforts: The After Phase is the time for

resilience. Resilience comes through the implementation of *new policies*, to enhance the level of adaptability during times of economic and social instability. New needs entail the urgency for new professional figures, who are qualified to predict, react and solve new types of future crises.
This comes through the *specialization* of new and old professionals in the tourism industry. This is the moment in which *individuals*, such as *travelers* and *operators*, can appeal to public and international *institutions* to learn how to improve their impacts and contribute to the recovery stage actively.

For example, travelers can start informing themselves about new responsible ways to travel and how to make sustainable choices when planning a trip. The sources of information can be officially recognized worldwide, so public and international institutions (such as UN departments or NGOs with social and/or environmental focuses) would be the most relevant sources to learn about good practices and positive trends. Through the same institutions, the operators from the sector can start improving their businesses, their programs and actions in order to be aligned to the needs of new, responsible travelers. This can help in influencing future travelers.

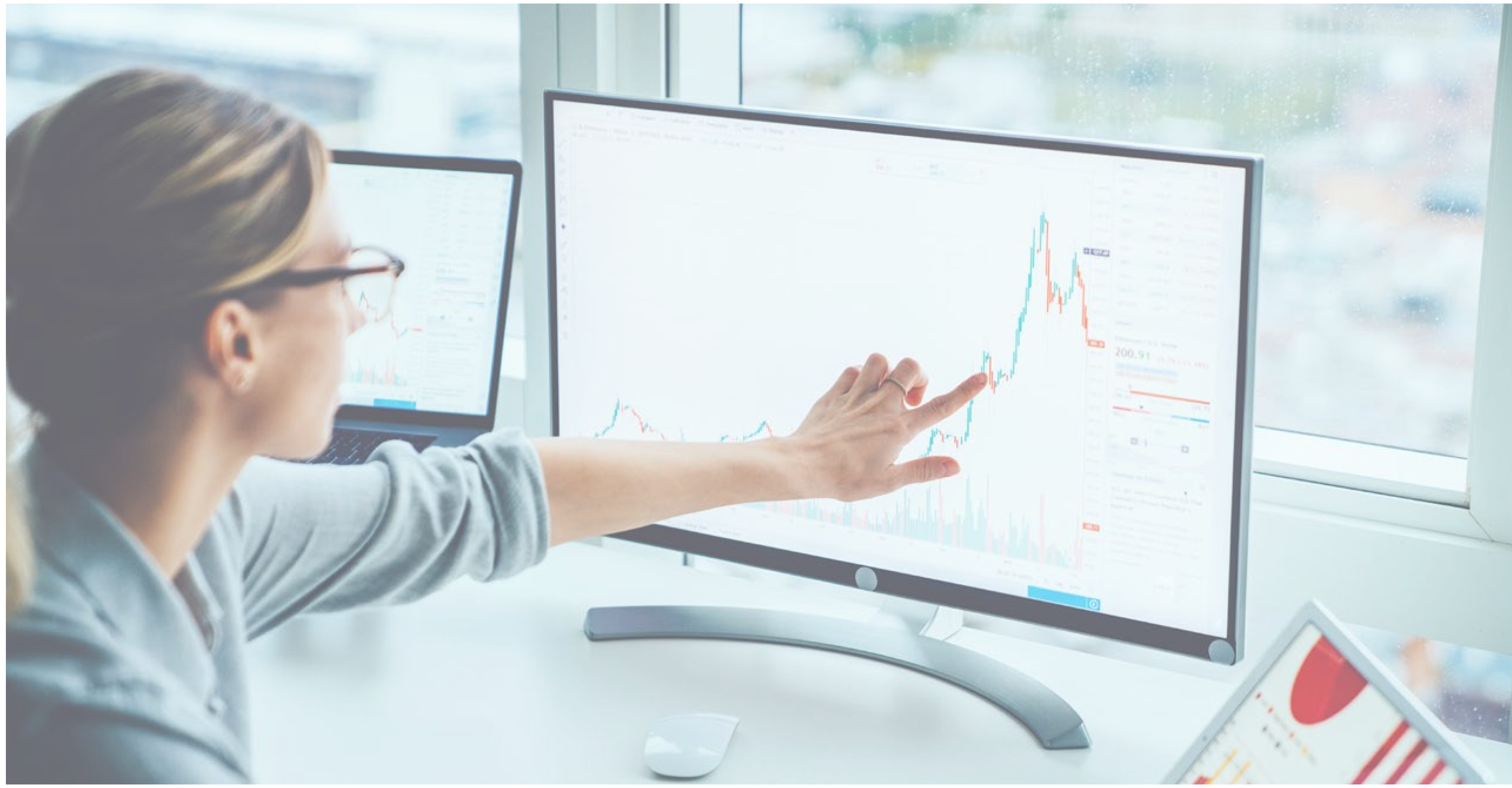
The "New Normal" Phase

Focus: Responsibility

Stakeholders: Individuals (TV And OP) & Associations

Actions: Training, Monitoring, Investments

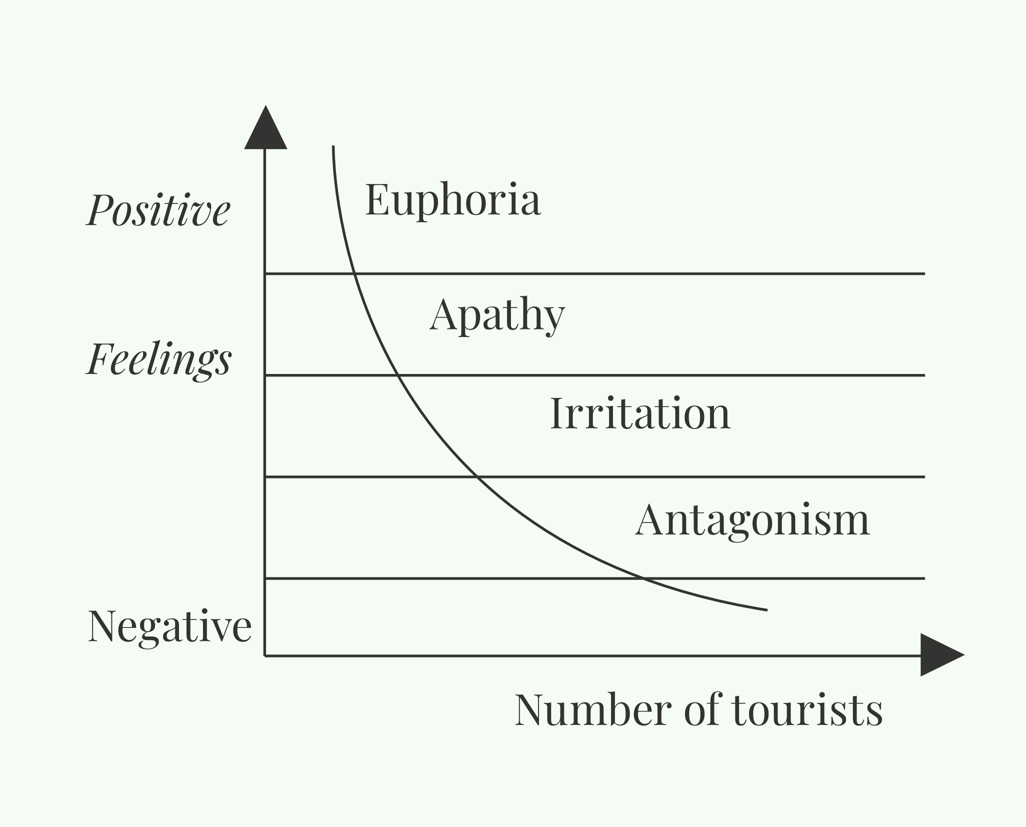
Change may be tough, but it can be something positive. After the tourism industry makes it through a social and economic crisis, *responsibility* becomes the keyword to success in terms of boosting the economy, protecting the environment and promoting social equality. Being responsible means being ready to react in any future crisis, by focusing on training, monitoring and making investments.
Training serves to create or consolidate new professional figures with the creation of educational courses that are accessible, in addition to webinars, conferences and workshops with a special focus on sustainability. In this same context, *monitoring* is a relevant tool to keep the situation under control and recognize when a new "Before Phase" begins to approach (by comparing old and new data). Lastly, *investments* are fundamental in allowing entrepreneurs to renew the sector and provide new jobs opportunities.
In this phase, either *travelers* and/or *operators* should rely on associations active in the sustainable tourism sector to train, educate about current data detected and future investments' opportunities.
For example, *individuals* that are interested in the tourism industry can start an educational path to specialize in varying branches of sustainable tourism, while previous *professionals* can use the data collected and compared to those of previous stages to create new businesses, associations or initiatives, on the base of new trends and needs. Actors can apply for grants in order to do *investments* inside the sector that can be also supported by tourism associations.



»»»» *Forecasting model: doxey irritation reverse index*

The **Doxey Irritation Index** model was created in 1975. Its purpose was to analyze the reaction of local communities living in specific areas that were evolving into touristic destinations. The model assumes that a whole community becomes hostile to tourism due to the over saturation of tourists and tourist facilities. Overtourism refers to a phenomenon where the quantity of tourists welcomed in a given tourist area is greater than its actual capacity, causing a sort of "urban stress" due to the negative impact of tourism on the local population, the management of the urban planning and the environment.

Figure 71.- Doxey Irritation Index model (1975)



Irritation Index model

According to the Doxey Irritation Index model, as a destination starts receiving tourists, it goes through different stages in time:

» **Phase 1 Euphoria**

This stage is categorized by *exploration* and *involvement*. Here, the locals experience the new element of tourists. This has an effect on many levels of their daily routine, as it influences the economy, the community and the urban management of a space.

» **Phase 2 Apathy**

The locals focus more on the economic benefits deriving from the increasing tourist flows, by putting more efforts in turning the destination they live in into something attractive and marketable. It's the stage of *Development*, during which tourists start to be treated more formally and as customers.

» **Phase 3 Irritation**

As the stage of *Consolidation* begins, the tourism industry becomes cumbersome and impossible to manage only internally. Important external investments arrive and the increase in numbers of tourists starts negatively impacting the lives of locals.

» **Phase 4 Antagonism**

This is the condition in which destinations are affected by over tourism and threatened by Stagnation and *Decline* as a likely future. Tourists are often seen as a problem. Currently, locals have suffered the increase in property prices in the central and historic areas of large cities, resulting in some having to leave their homes and move out of the city. The new tenants are mostly "temporary" tourists, students and foreign workers with greater economic possibilities, whose presence and possibility of spending leads to the increase in prices of other commercial activities and services.

Doxey Irritation Index model was created in a period in which tourism was growing very fast, often times beyond many cities' capacities, contributing to mass tourism. In the current situation of a global pandemic, the Doxey Irritation Model can be taken into consideration.

Taking into consideration the results of the survey conducted in April, 2020, some relevant data can be identified in relation to the Doxey Irritation Model.

75,58% of the participants were willing to reschedule a trip before the end of the year, if possible.

63,30% of the participants would be glad to book (in advance) a travel experience for 2021, if a discount is offered;

62,45% of the participants said that the global pandemic has not affected negatively their desire to travel. Those who declared to be scared of traveling, justify their answers by connecting it to health and safety reasons;

Once the pandemic is "under control", **54,73%** of the participants will start traveling again domestically - waiting less than three months;

56,33% of the participants expressed a high interest in doing local workshops when travelling domestically, in order to learn more about traditions and culture in a certain place.

In addition to what has just been said, it is important to mention that there is mainly one big voice speaking in the social networks, TV channels and newspaper: the concern of an exacerbation of the infections when restrictions are lifted up. Despite the majority of the participants to the survey are willing to travel again - even sooner than expected, when it comes to domestic trips - there a consistent part of the world population that is scared by the global pandemic and the hypothesis of a second wave of contagions.

Despite this, each country is going through different stages - with different timing and measures[9] - to recover from the economic crisis caused by the pandemic. And one of the main asset to recover (everywhere) is tourism. Doxey Irritation Reverse Index is a model thought to forecast the future trends in tourism within a positive scenario, mainly in a domestic context (but also applicable to a larger scale, worldwide, when the number of contagions will be similar to zero).

The main phases are the same, but disposed differently in time - that's why it is called "reverse":

» **1) A phase of Antagonism.**

Not all the countries have opened their border yet and not all the travellers are allowed to cross certain borders (which means there will be different measures in welcoming

9. COVID-free countries are planning to allow travels inside their border, but favouring those citizens coming from safe zones - where the spread of the virus has been more controlled. For example, Greece is planning to let in visitors from Austria, Bulgaria, Denmark, Ciprus, Croatia, Norway, Germany and Czech Republic; while Italy and Spain are not in the list. Countries like Spain are planning mandatory quarantine for travellers coming from abroad, as tourism represents 15% of the country GDP and frontiers will not be closed. Countries like UK and France are working to avoid mandatory quarantine instead. In Latin America, each country is taking different measures - for instance, Colombia is reopening the borders in June with mandatory quarantine for every traveller coming from abroad (no distinction between "red" or "green" zones). Canada is planning strict measures to limit arrivals inside the country - with special attention on flights coming from USA, where 41 out of 50 states are already reopening (or planning to do it very soon).

travellers and tourists coming from COVID-free countries or highly affected ones). Foreigners are seen as a danger: it's the stage of *Discrimination*. Locals no traveling abroad feel threatened by foreigners' presence and are not willing to receive external tourists, even if they do recognize the importance of this sector for the economy;

» **2) A phase of Irritation.**

The infection curve almost reaches zero, restrictions on mobility are lifted. The companies which survived the crisis bring in innovations designed to stimulate economic growth, and more people start traveling again - for personal and professional reasons. It's the stage of *Innovation*. The increasing number of foreigners in a destination may be brought to overcrowded areas - not reaching overtourism's levels, but levels perceived as dangerous. Tourists and travellers may be able to get some sympathy when meeting *temporary residents*[10] or other travellers. However, this phase is strictly connected to the local mindset and culture of a destination - and not to be given for granted everywhere in the world;

» **3) A phase of Apathy.**

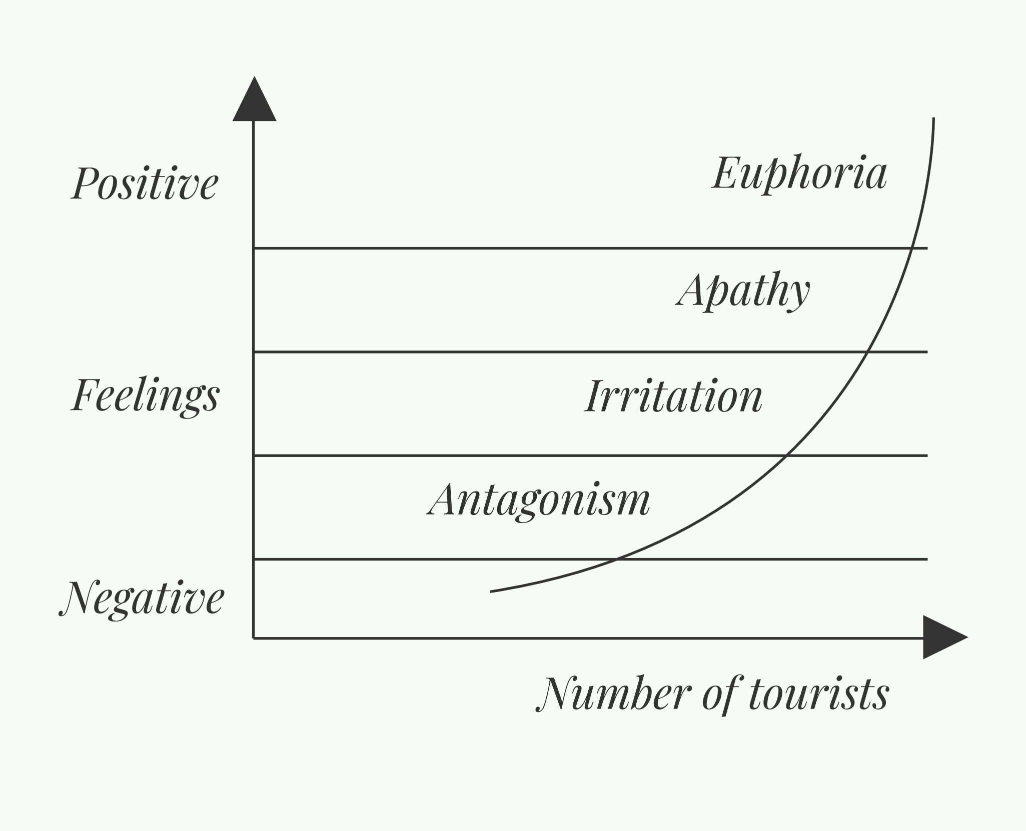
Despite the probable appearance of new outbreaks (to a lesser extent), the local population learns to live with the presence of the virus (while waiting for a vaccine) and gets used to the presence of travelers and tourists in their localities. At the same way, those people who were waiting before traveling again, start moving - not only domestically. This is how the real stage of *Recovery* begins, during which a previous discriminatory attitude and behaviour toward the foreigners finally lower down;

» **4) A phase of Euphoria.**

It's the stage of *Responsibility*, as people has learnt how to travel safely both domestically than internationally: tourism assumes a responsible connotation that is not temporary, but rather a new (necessary) condition for the economy to recover, and that people also find relief in returning to a new, better normality. Tourism may not be fully sustainable yet, but it does become responsible - and, as a sector, learns how to deal with any future crisis happening in the future (by planning and structuring new tourism crisis management models).

10. A "temporary resident" is a foreign individual granted the right to stay in a country for a certain length of time (with a visa or residency permit), without full citizenship. This condition is very common among students and/or workers who are spending abroad a period of their life, to improve their studies or for business reasons.

Figure 72 - The Doxey Reverse Model



Model drafted by the author

»»» *Conclusion*

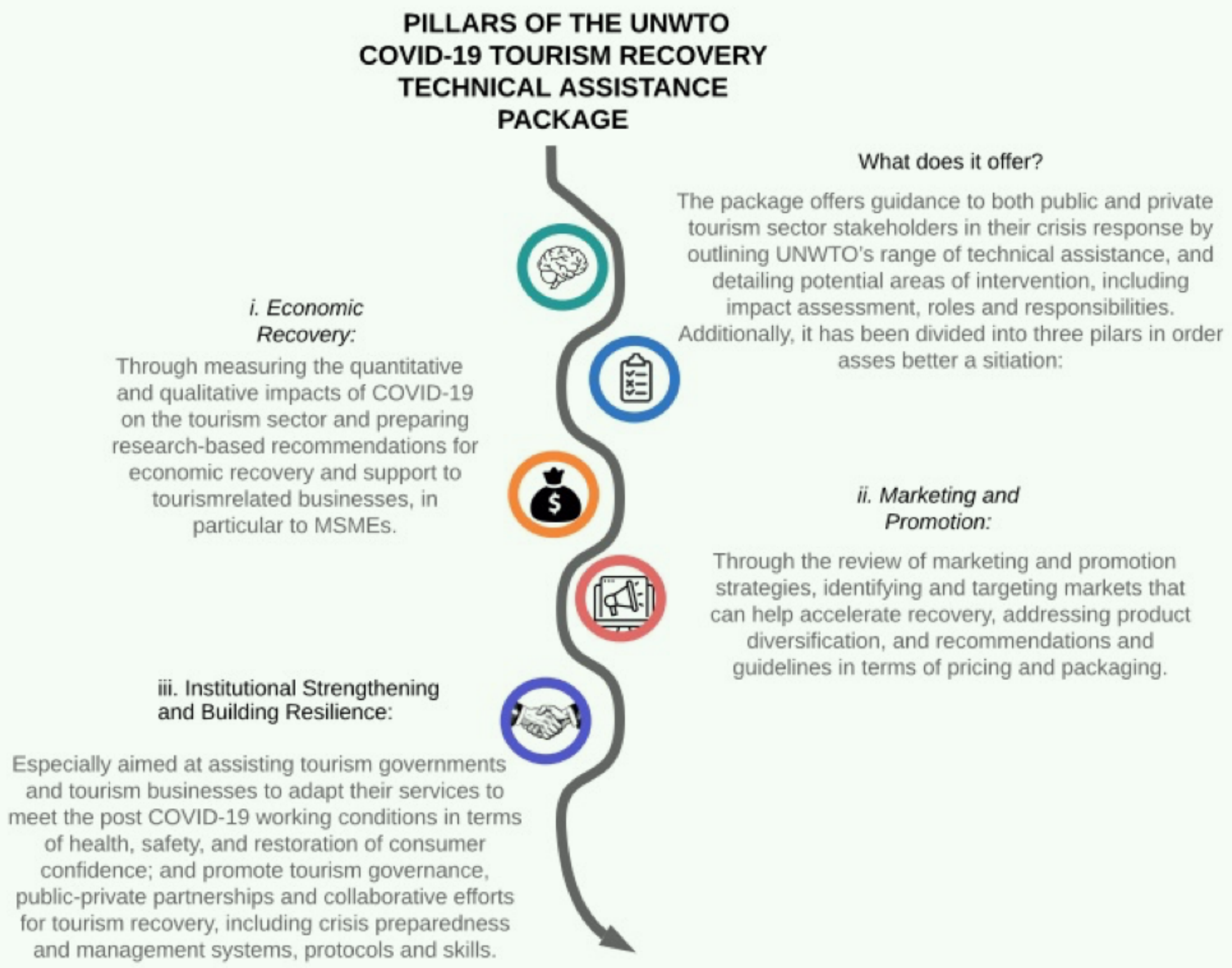
All in all, the tourism industry has gone through several changes, phenomena, crises, health-related issues and more. However, as history has shown, it will continue to be relevant as the sector occupies an important role in societies and global economies (often considered a tool for development in many countries). It will be the duty of tourists to be able to adapt to new traveling paradigms that will be presented in the coming future; and the obligation of companies and organizations to adapt to new ways of thought and procedures in order to bring the industry back to its former peak.

As the world goes through the worst crisis for the tourism sector on record, it is important that as a society, people work together to revive the industry. Likewise, as tourist service providers or governmental entities, it becomes essential to guarantee the safety and well-being of visitors throughout the entire length of the trips. Innovations and incentives are being implemented around the globe to reactive this activity with the hope that soon we can all travel again.

Annexes

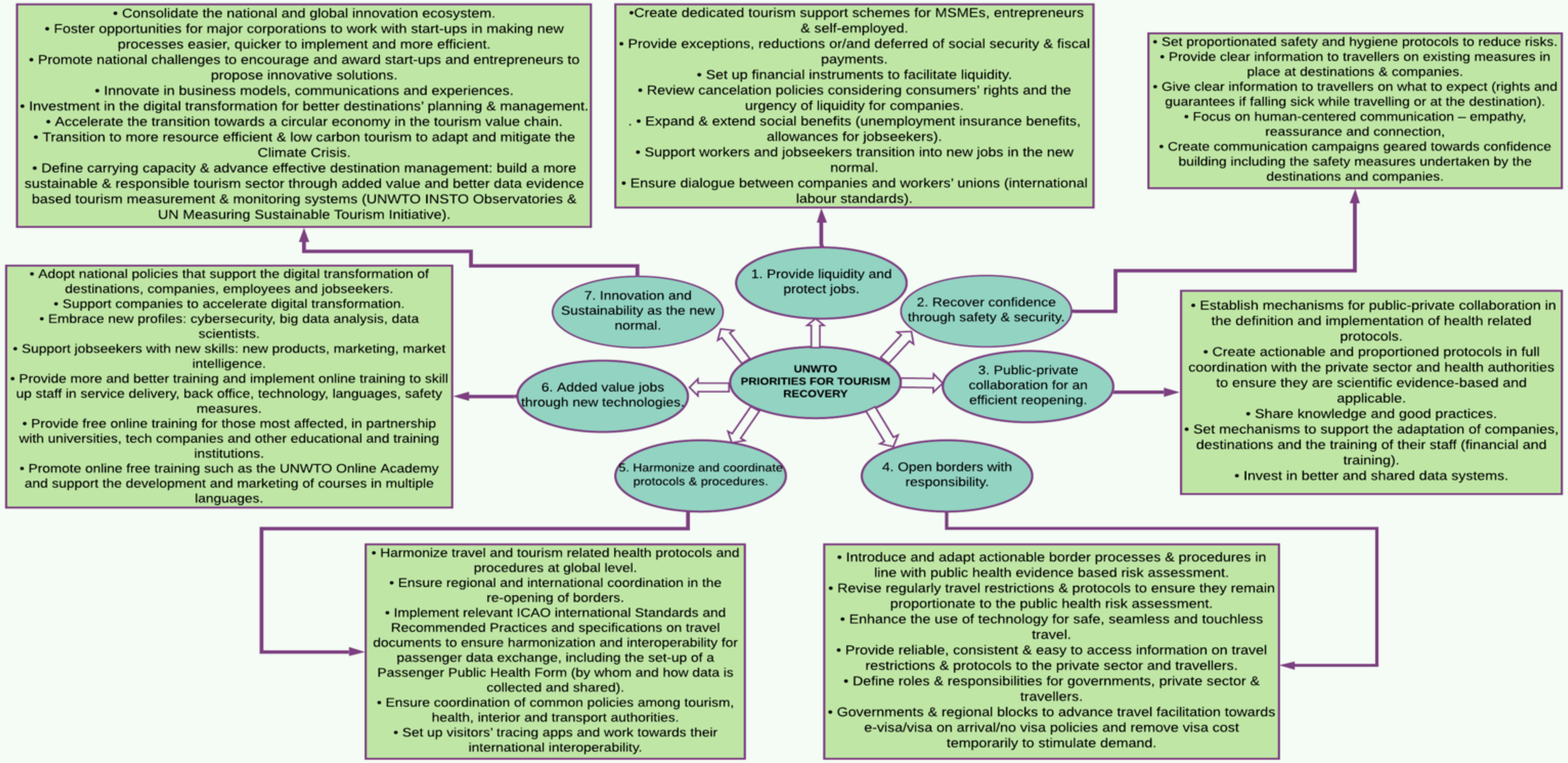
As part of the UNWTO plan for approaching the COVID-19 pandemic; several studies, panels, data collection and strategies had been created with experts, professionals, entrepreneurs and organizations around the globe, with the aim of recovering the powerful sector of tourism worldwide. The following documents contain some UNWTO´s relevant guidelines for healing the industry and a COVID-19 timeline in order to have a better understanding of the pandemic that has drastically altered the everyday life.

Annex 1.- UNWTO Pillars for COVID-19 Tourist Recovery



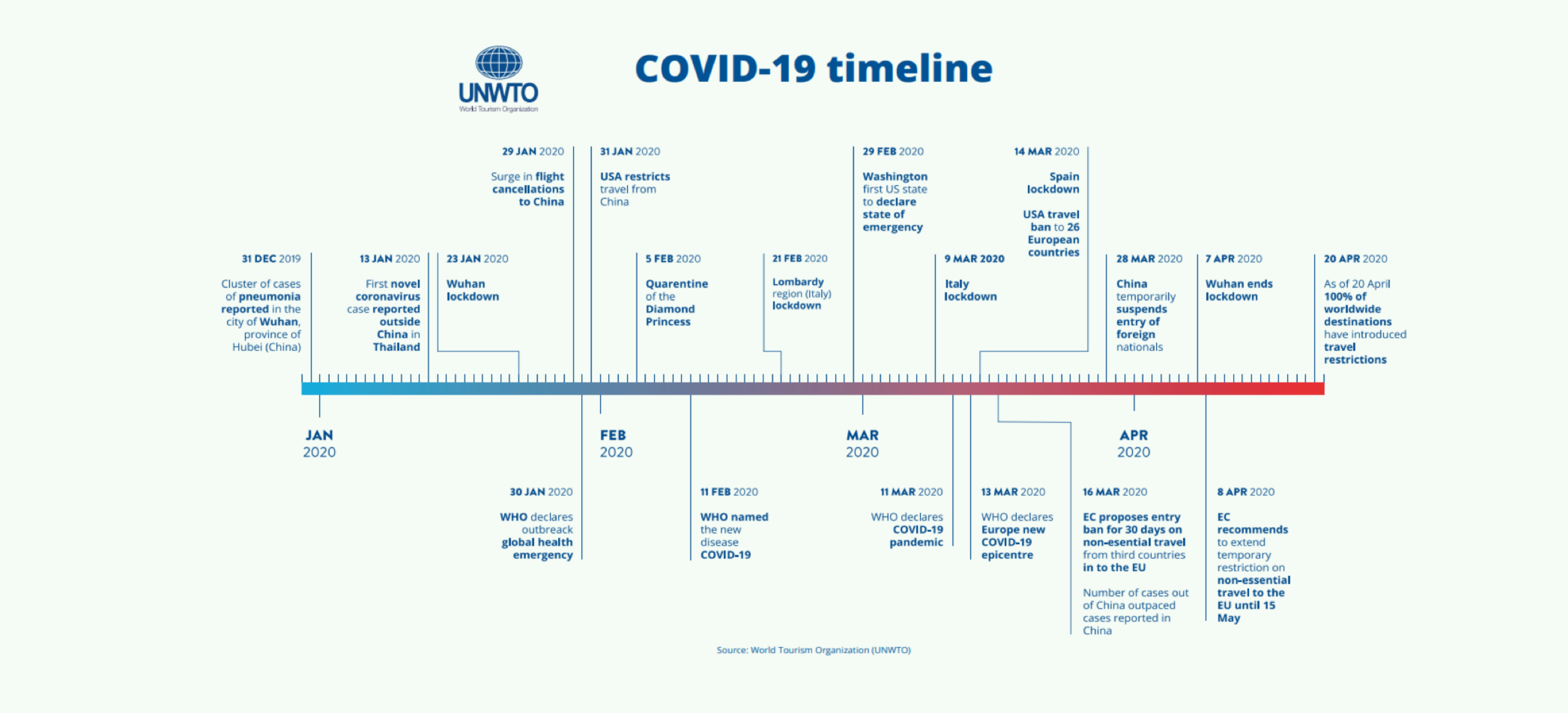
Drafted by the authors from The UNWTO COVID-19 Tourism Recovery Technical Assistance Package, 2020

Annex 2.- Priorities for Recovery by the UNWTO



Drafted by the authors from UNWTO Priorities for Tourism Recovery, 2020

Annex 3.- UNWTO COVID-19 TIMELINE FROM DIC 31ST- APR 20TH



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Thanks!

The authors want to thank the people who believed in their project and supported their research with effective tools.

Thanks to Claudio Milano,
Director of the Master in Sustainable Tourism Destinations and Regional Tourism Planning at **Ostelea Tourism Management School** for believing in us from the beginning and allowing us to make this contribution of ours reach as many professionals and travelers as possible.

Thanks to Samantha Anderson,
for her support in working as Editor and going through all our ideas and words.

Thanks to the team of Survey Sparrow,
for providing us with support during the processing and distribution of our survey: "When we travel again".

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