

TOURISM POLICY

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ABSTRACT

The tourism economy has been heavily hit by the coronavirus (COVID-19) pandemic, and measures introduced to contain its spread. Depending on the duration of the crisis, revised scenarios indicate that the potential shock could range between a 60-80% decline in the international tourism economy in 2020. Beyond immediate measures to support the tourism sector, countries are also shifting to develop recovery measures. These include considerations on lifting travel restrictions, restoring traveller confidence and rethinking the tourism sector for the future.

Keywords: Tourism, Marketing, Policy, Strategy, Tourists.

Introduction

The coronavirus (COVID-19) pandemic has triggered an unprecedented crisis in the tourism economy, given the immediate and immense shock to the sector. Revised OECD estimates on the COVID-19 impact point to 60% decline in international tourism in 2020. This could rise to 80% if recovery is delayed until December. International tourism within specific geographic-regions (e.g. in the European Union) is expected to rebound first.

Domestic tourism, which accounts for around 75% of the tourism economy in OECD countries, is expected to recover more quickly. It offers the main chance for driving recovery, particularly in countries, regions and cities where the sector supports many jobs and businesses.

The impact of the crisis is being felt throughout the entire tourism ecosystem, and reopening and rebuilding destinations will require a joined up approach. Tourism businesses and workers are benefiting from economy-wide stimulus packages, with many governments also introducing tourism specific measures. Governments and industry are focusing their efforts on:

Lifting travel restrictions and working with businesses to access liquidity supports, apply new health protocols for safe travel, and help to diversify their markets.

Restoring traveller confidence and stimulating demand with new safe and clean labels for the sector, information apps for visitors and domestic tourism promotion campaigns.

Preparing comprehensive tourism recovery plans, to rebuild destinations, encourage innovation and investment, and rethink the tourism sector.

These actions are essential, but to reopen the tourism economy successfully and get businesses up and running, more needs to be done in a coordinated way as tourism services are very interdependent. The travel and tourism industry and governments should continue to reinforce their coordination mechanisms to accompany the businesses, notably the smallest ones, and the workers. Particular attention should be given also to the most sensitive/vulnerable destinations in the recovery phase.

Looking ahead, the measures put in place today will shape tourism of tomorrow. Governments need to already consider the longer term implications of the crisis, while staying ahead of the digital curve, supporting the low carbon transition, and promoting the structural transformation needed to build a

stronger, more sustainable and resilient tourism economy. The crisis is an opportunity to rethink tourism for the future.

Tourism is a significant part of many national economies, and the immediate and immense shock to the tourism sector resulting from the coronavirus pandemic is affecting the wider economy. As governments around the world have introduced unprecedented measures to contain the virus, restrictions on travel, business operations and people-to-people interactions have brought the tourism economy to a standstill. Many countries are now entering a new phase in fighting the virus while at the same time managing the re-opening of the tourism economy. This is a complex and challenging task, and quantifying the impact on the tourism economy is difficult.

Five months into the crisis, the situation continues to evolve and the outlook remains uncertain. Recovery is now expected to start later and be slower than previously foreseen. Travel restrictions and containment measures are likely to be in place for longer, and are expected to be lifted only gradually, with the possibility of reversal should new waves occur. Even when tourism supply chains start to function again, new health protocols mean businesses will be operating at restricted capacity. Demand-side recovery will also take some time, given the interlinked consequences of the economic and health crises, and the progressive lifting of travel restrictions, while consumer confidence and travel behaviour will be more deeply impacted the longer the pandemic goes on. This will have knock-on implications for many national economies.

Revised scenarios indicate that the implied shock could amount to a 60-80% decline in the international tourism economy¹ in 2020, depending on the duration of the crisis and the speed with which travel and tourism rebounds. Maintaining the baseline that tourism flows have remained severely restricted up to June, these estimates are based on the revision of two earlier scenarios for international tourism arrivals for the OECD area, supplemented by a third scenario which would see any meaningful recovery essentially delayed until 2021:

Scenario 1 (revised): International tourist arrivals start to recover in July, and strengthen progressively in the second half of the year, but at a slower rate than previously foreseen (-60%).

Scenario 2 (revised): International tourist arrivals start to recover in September, and then strengthen progressively in the final quarter of the year, but at a slower rate than previously foreseen (-75%).

Scenario 3 (new): International tourist arrivals start to recover in December, based on limited recovery in international tourism before the end of the year (-80%).

A key problem facing all countries and organizations attempting to introduce alternative tourism and sustainable policies is that of the sheer numbers, and the question of equity of opportunity. Large-scale tourism brings inevitably high impacts, and the prospect of economic gain may often overwhelm social and environmental considerations until it is too late, for example, the Galápagos. The controls that often become part of sustainability policies may be interpreted as elitist. The impacts of escalating numbers and the issue of elitism are well illustrated in the case of the United States' great outdoor national parks. The problems of balancing environmental sustainability and 'the wilderness experience' with the demands of mass tourism are demonstrated in Yosemite National Park, which receives more than 4 million visitors a year.

Despite recurring economic recessions, political disturbances, and environmental disasters, it seems inevitable that global tourist numbers will continue to increase and that tourists will assume the right to penetrate planet earth ever more comprehensively. Although tourist numbers from the Western

world may level out, the rise of affluence levels in populous countries such as Brazil, Russia, India, and China is likely to generate another growth surge. It must be remembered, too, that many people prefer 'mass' tourism experiences, with the full range of comforts and facilities, and will continue to do so. Equally, business and conference travelers demand ever more expensive, resource-consuming facilities. There is also the question of whether alternative and more readily sustainable projects, generally low key and relatively small scale, can, by themselves, "survive in developing countries, or elsewhere, without having some other form of tourism to be an 'alternative' to." From this perspective, even though a project may be environmentally and ethically sound, it may not achieve a threshold of economic sustainability.

It may well be, therefore, that the most effective strategy for a country or region is to absorb the growth in demand through carefully located and planned developments using 'green' technology in large-scale destination enclaves. Such a strategy concentrates impacts and environmental modifications, while facilitating opportunities for monitoring and control, for example, a 'sacrifice zone.' The 'product consumption' takes place within the resort and is thus demand based, not resource based: local dance groups perform and craftspeople sell their artifacts in the hotels or in a 'cultural center.' The essential obstacle, all too often, is finding the investment capability within the country in order to maximize control. In parallel, dispersed alternative and niche tourism projects would be under less pressure and yet could well remain economically viable within the broader tourism of the destination region or nation. From the demand side, the tourism industry would be offering a diversified product of opportunities and experiences, from the synthetic to the authentic, or at least the staged authentic. Oman, for example, has developed a cluster of large hotels in the capital of Muscat, with opportunities for 'adventure' excursions and tours to more remote camps and resorts.

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