

The Travel and Tourism Industry: Pandemic and Beyond

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Abstract

First to be hit and the last to recover, the travel and tourism industry is considered to be one of the most severely affected sectors from the Covid-19 pandemic. The paper tries to highlight the vulnerabilities of GDP, employment and related activities of the tourism sector by looking at it through a macro perspective using data from the World Bank, International Labour Organization, the United Nations World Trade Organization and, the World Travel and Tourism Council. In addition, the paper also attempts to substantiate the results through micro evidence in the form of case studies. The paper, using quantitative and qualitative methods, shows that the GDP, employment and related activities are susceptible to the pandemic- COVID-19 and suggests how to pandemic-proof the sector that not only contributes significantly to

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the GDP but weaves a thread of interconnectedness across the world.

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1. Introduction

The Travel and Tourism industry is one of the most dynamic sectors that benefit many other sectors like lodging, catering, transportation, retail, entertainment, etc (Liu, Ying, Wang, & Changchun, 2019). The sector flourishes on the model of visitations and great efforts are made by decision-makers to attract visitors to contribute to the sector. It has been widely recorded that the tourism growth has outperformed the world GDP growth record consecutively from the year 2011–2017. In 2019, the total contribution of the travel and tourism industry accounted for 10.4 percent of the total GDP worldwide, according to the World Travel & Tourism Council (WTTC). However, due to the travel restrictions that are being observed at national and international levels-including travel bans, border closures, events cancellations, quarantine requirements and fear of spread, the sector has been gravely disrupted.

The Indian tourism industry for example, provides about 87.5 million jobs, with 12.75% of total employment, thereby contributing INR 194 billion to India's GDP. It had achieved a 3.2% growth from 2018, with 10.8 million foreign tourists arriving in India with a foreign exchange earning of USD 29.9 billion in 2019. The industry, in the period of the Covid-19 pandemic, saw a decline of 66.4% in the overseas tourists' arrivals in India in March 2020 compared to the year before. The potential workforce loss in tourism and hospitality has been estimated at 38 million, which is 70 percent of the industry workforce. The estimated loss in India's tourism sector was doubled from INR 5 lakh crore to INR 10 lakh crore (Press Trust of India., 2020). Thus, sustaining its output and employment during the pandemic is a challenging task for the industry.

Section 2 of the paper reviews the literature present in the area of the study followed by the macro perspective of the problem,

analyzed in section 3, while in section 4, case studies to understand the micro situation have been examined. Section 5 presents the conclusion and policy recommendations.

2. Review of Literature

One of the major repercussions of health-related crises is that it has an impact on tourism in terms of demand and has significant socio-economic consequences, especially in tourism-dependent countries. (Novelli, Burgess, Jones, & Brent, 2018)

The outbreak of the foot-and-mouth disease in the United Kingdom in 2001 caused a crisis in British agriculture and tourism, and by the time that the disease was brought under control in October 2001, the crisis was estimated to have cost the United Kingdom £8bn (Knight-Jones & Rushton, 2013). The impact of the foot and mouth disease had grave effects on the GDP through a decrease in tourism expenditures in the U.K. economy (Blake, M.Thea, & Guntur, 2003). Studying about the swine-flu pandemic in 2009-10 and the 2008 global economic crisis, one study finds that together they had a significant and negative impact on the demand for the U.K.'s inbound tourism. However, the authors of the study conclude that after the downturn, the travel and tourism sector bounced back to its long-term pattern of growth. (Page, Song, & Wu, 2012)

Radhakrishna observes that the effects of the pandemic on tourism and hospitality in India continue to grow adverse with the sector moving towards higher unemployment rates (Radhakrishna, 2020). Dash also points out the pandemic effects will be self-evident in the country's adventure travel, business travel, inbound, outbound and domestic tourism, as well as cruise holidays (Dash, 2020).

While Cutler and Carmichael define tourism as a complex psychological process, another study observes that the impacts of the SARS outbreak were also primarily psychological, among others (Cutler & Carmicheal, 2010) (Wen, Huimin, R, & Kavanaugh, 2005). It was also found that the travel and tourism sector was substantially affected as a result of the SARS outbreak, an outbreak very similar to the present pandemic in the countries

affected (Siu & Wong, 2004). Air travel, for instance, has been regarded as an amplifying and accelerating factor for influenza (Browne, Sancha, Charles, Jonathan, & Tan, 2016) and this segment has witnessed a devastating setback as the need for personal safety and survival has become vital (Nicola, et al., 2020). Garg highlights how the risk perception on safety and other factors have repercussions on decisions of choosing a travel destination. (Garg, 2015)

In their study Bas and Sivaprasad concluded that hospitality businesses might be required to re-examine their existing work models and determine the possibility and applicability to adopt remote working. They further add, businesses must explore their recovery options before lockdown is lifted as the pandemic has made the sector look 'inwards' or depend on organic growth to sustain itself and must ensure that they have 'stress tests' mechanisms to ensure that they can cope with any sudden breakdown of processes. Communication about staff absences, staff furloughing, staff travel, hygiene and social distancing measures will have to be in liaison. Disaster planning must be carried on with utmost importance for all businesses as it is imperative that businesses continue to plan for all eventualities (Bas & Sivaprasad, 2020).

3. Pandemic and the travel and tourism industry: A macro perspective.

a. Methodology

To understand the travel and tourism sector scenario at the macro level, data regarding tourism shares in the GDP and revised forecasts and estimates on the rate of GDP growth (as per the World Bank) is analyzed. The analysis is made to find the effect on output and trends of different global parameters related to the travel and tourism sector. Estimates regarding employment for the year 2020 have been analyzed to study the impact of the pandemic on employment.

b. Results

In this sub-section, first we look at the effects of the pandemic on GDP growth and relate it with the dependency of a country on tourism as measured by the contribution of tourism to GDP (as a % of GDP in 2020) to understand the impact of the pandemic on output in the sector. We use the data on revisions in forecasts and estimates of GDP growth rates made by the World Bank for the countries around the globe obtained from the January 2020, June 2020, and January 2021 World Bank reports. This method of understanding the vulnerabilities of macroeconomic indicators is feasible because the World Bank Report of January 2020 estimates GDP in pre-COVID while all reports hence factor in the pandemic for estimating GDP (Mitra & George, 2020). The contribution of the travel and tourism industry to GDP as a percentage of GDP for 2020 was obtained from the World Travel and Tourism Council. A total of 119 countries have been included in the sample. Some countries have been excluded from the sample as the data for them was not available at the time of the study. Later we look at the employment scenario in the sector.

Fig1: Plotting the difference in growth rates of forecast in June (after pandemic) and January (before pandemic) Both Figure 1 (difference between forecasts made on January 2020 and revised forecasts made on June 2020 for the year 2020) and Figure 2 (difference between forecasts made on January 2020 and estimates for 2020 made in January 2021) depicts that, larger the share of tourism in a country's GDP, greater the dip in growth rates has been, as shown by the negative relationship between the two variables, indicating the vulnerabilities of the tourism industry to external shocks such as the Covid-19 pandemic. When we compare the forecasted fall and the actual fall in growth rates, we see that the fall in GDP was greater than the forecasts had predicted thus pointing towards a grimmer picture than was forecasted. This is in tandem with the UNWTO findings that export revenues from tourism could fall by \$910 billion to \$1.2 trillion in 2020. This will have a wider impact and could reduce global GDP by 1.5% to 2.8% (UNWTO, 2020).

When we look at the patterns in 2021, found in Figure 3, we see a positive relation between the contribution of tourism to GDP in 2020 (as a % of GDP for 2020) and the change in percentage point in real GDP growth (difference between the forecasts made in 2020 and the revised forecasts made in 2021 for the year 2021), indicating that countries which have a major share of output from tourism will have a rise in the growth rates.

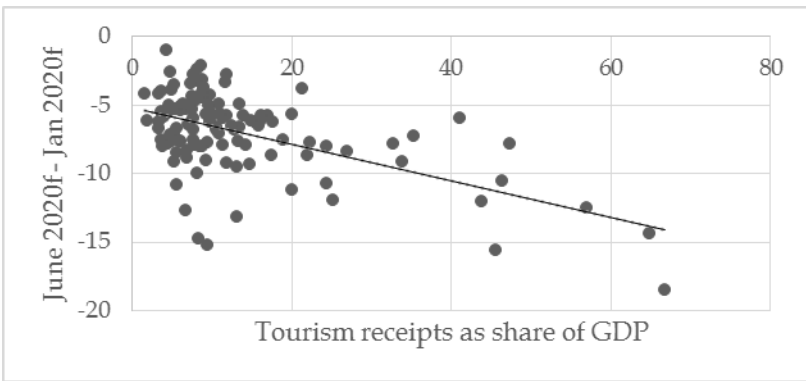


Fig1: Plotting the difference in growth rates of forecast in June (after pandemic) and January (before pandemic) 2020 against tourism receipts as a share of the GDP.

Source: Author's graph based on the calculations made using data from World Bank Report and World Travel and Tourism Council.

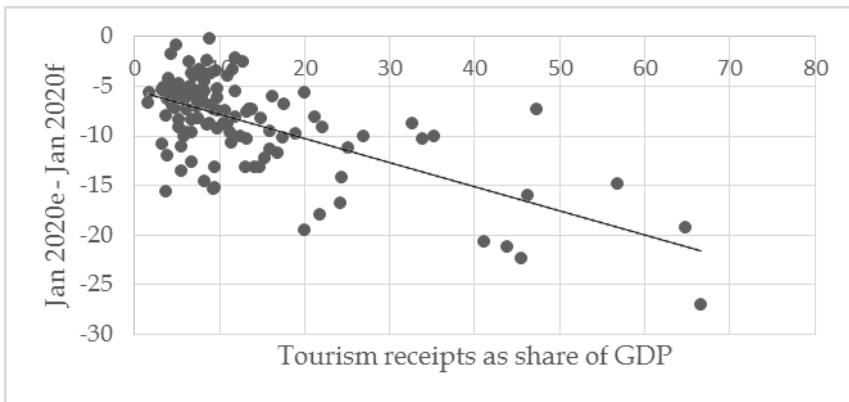


Fig2: Plotting the difference in growth rates between the forecasts made on January 2020 and estimates for 2020 made in January 2021 against tourism receipts as share of GDP

Source: Author's graph based on the calculations made using data from World Bank Report and World Travel and Tourism Council

Since we have considered a year-over-year growth rate, and growth rates estimated for 2020 is very low, the base to the calculation of 2021 forecast is also rather small. This base effect can be the reason for a higher growth rate in 2021 with respect to 2020 in the 2021 report. (ENS Economic Bureau, 2021) Furthermore, the positive changes we see can be an overestimation and thus should be approached carefully. Yet, the 2021 forecast is hopeful and indicates that there is an expected GDP growth in countries with larger contribution of travel and tourism to GDP as compared to 2020 pointing towards a revival of the sector. This also seems to be the actual scenario as with the relaxation of the restrictions on travel, people have started traveling again and other indicators regarding travel sentiments across continents also show this revival. The results make us cautiously optimistic as it depends on the pace and magnitude with which the multiple waves of the pandemic hit us as well as the vaccination coverage. As found by McKinsey and Company in an October 2020 report, an optimistic recovery scenario, combining rapid virus containment and rebounding economies, will see a recovery to 85 percent of the 2019 volume by 2021 and a full recovery by 2023. Under a pessimistic recovery scenario, which seems to be the case given the rise of the second and third wave of infections in many countries, 2021 levels can be as low as 60 percent of 2019, further postponing the recovery. (Binggeli, Constantin, & Pollack, 2020)

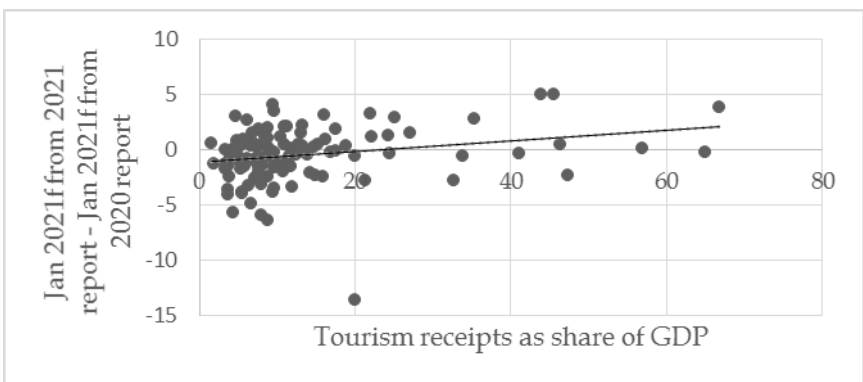


Figure 2: Plotting the difference between forecasts made in 2020 and revised forecasts made in 2021 for the year 2021 against tourism receipts as a share of GDP

Source: Author's graph based on the calculations made using data from World Bank Report and World Travel and Tourism Council.

With the fall in output and growth rates, a decrease in the activities in the travel and tourism sector and a subsequent fall in employment is an expected outcome. To study the impact of the pandemic on the sector in terms of employment and other activities, we study the trends in four indicators namely International Tourist Arrivals, Domestic Seat Capacity, Travel Sentiments given by Net Sentiment Score and Hotel Bookings in 2020 for the four quarters (January – December). And the trends in the above-mentioned indicators, studied upon in six reference areas, namely regions of Africa, Americas, the Arab states, Asia and the Pacific, European Union and the world, using data from World Tourism Organization (UNWTO), have been compared to the trend in working hours lost due to COVID -19 pandemic as estimated by the International Labour Organization (ILO) to understand the effect of the pandemic on employment in the sector.

As per a UNWTO report from April 2020, there were travel restrictions in 100% global destinations in the wake of the pandemic and among the countries about 45% had totally or partially closed their borders, 30% had completely or partially suspended international flights, 18% of countries had completely banned entry for passengers from a few countries and 7% had also taken a variety of measures like quarantine and visa-related steps. The net travel sentiments scores during this period also gives the same trend pointing towards less demand of tourism and travel services after the first quarter but a strong revival towards the last quarter. With a halt in tourism activities and with strict travel restrictions, the international as well as domestic travels and tourist arrivals fell greatly, as can be observed from Figure 4 and 5. We see that in Q1 the tourist arrivals and travel decreased but at a slow rate due to the low COVID-19 cases in the early months and correspondingly fewer restrictions in most parts of the world. As the cases started to rise, the arrivals plummeted in Q2. In Q3 and Q4 the arrivals started to rise but very gradually and it has not yet reached Q1 levels. The trend remains the same across all the reference areas.

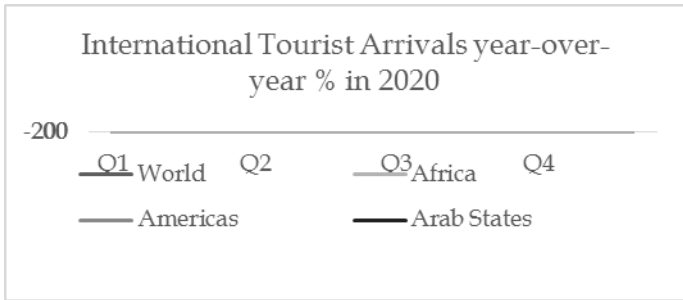


Fig 3 : International Tourists Arrivals (2020)

Source: Author’s graph based on the data from World Tourism Organization (UNWTO)

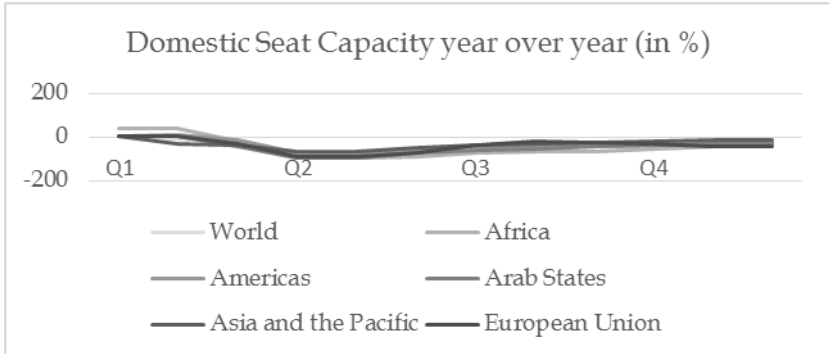


Fig4 : Domestic Seat Capacity (2020)

Source: Author’s graph based on the data from World Tourism Organization (UNWTO)

The impact of the restrictions and fewer travels as observed above on tourism sector activities is starkly visible when the trends on hotel bookings are observed. A slower fall in Q1 and then the plummeting in Q2 and a slow revival in the subsequent quarters mirror the above trends. However, the revival cannot be viewed to be an effect of increased tourists as in many countries hotels were used as quarantine facilities but it can be said that this did help the industry to stay afloat. (Feuer&Newburger, 2020)

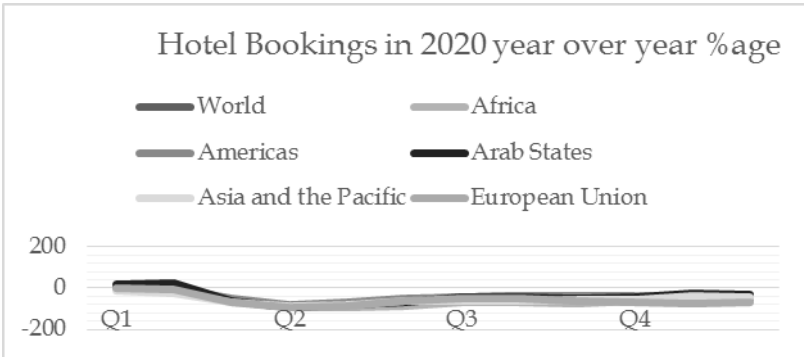


Fig 6: Hotel Bookings in 2020

Source: Author's graph based on the data from World Tourism Organization (UNWTO)

The indicators studied have shown a more or less U shape trend with a minimum in Q2 owing to the restrictions, risk aversion amongst travelers and countrywide lockdowns pointing towards a decline in activities in the travel and tourism industry. A fall in employment in the industry in the same quarter is thus a plausible outcome. The trend in the working hours lost due to the COVID-19 crisis using the ILO modeled estimates percent (Figure 7) is in tandem with this assertion as it shows that Q2 witnessed the maximum loss in employment in the world economy in general.

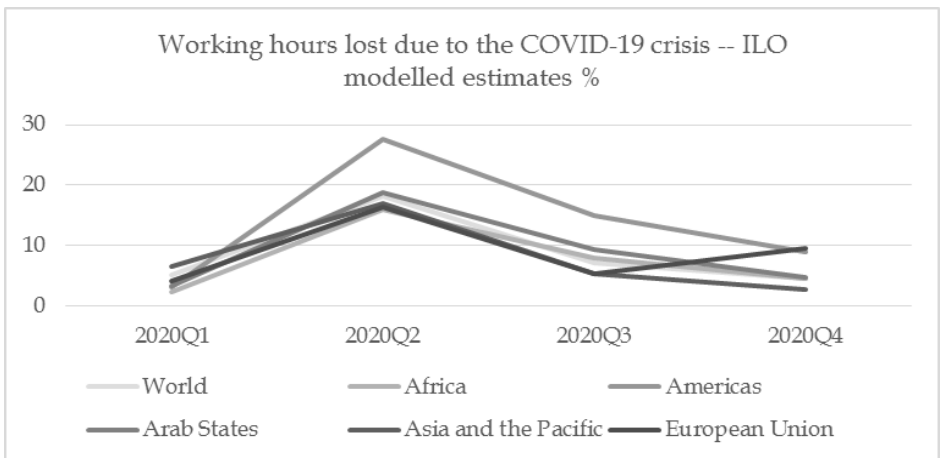


Fig 7: Working hours lost

Source: Author's graph based on the data from International Labour Organisation

Combining this with the facts that in 2019 tourism formed about 10.3% of global GDP, employing and providing 330 million jobs with 1 in 10 jobs across the world (WTTC, 2020), it is not an overstatement to say the workers in the travel and tourism industry suffered some of the worst of the pandemic.

Although trends of revival as shown by the indicators can also be observed in employment, the rise in working hours has not been in a uniform manner across the world; while some reference areas did approach the pre-pandemic levels in Q4, many are yet to be there. Thus, we see that there has been a decline in output and employment in travel and tourism sector which in turn have potentially affected the incomes and livelihood of millions due to the external shocks from the ongoing health crisis in the world. The case studies discussed in the next section throws light not only to the employment and revenue scenario of the sector but also on the decisions and innovations adopted by the players in the sector to overcome the crisis.

4. Case study- The micro perspective

a. Methodology

In this section, several case studies of hotels and travel businesses have been referred to elucidate upon the existing circumstances of the industry, measures being taken to counter the loss in revenue and a layout of the way forward for the recovery. We have used qualitative data in the form of interviews to understand the same. For the case study, six firms were interviewed by referring to a questionnaire developed after careful analysis of the trends in the travel and tourism industry post-lockdown imposition in March 2020 and over the course of the pandemic in the year 2020. In order to diversify the scope of the study, the interviewed firms consisted of small and large businesses, local and international businesses, hotels and travel firms and all firms included are located in India.

3. Results

The case studies are categorized into two; Category one includes hotels and travel businesses whose scale of operation is larger, number of employees higher and has a wider client base; Category

two includes firms that are smaller in terms of its scale of operations, employment provided and client base. Both categories cater to domestic and international tourists; thus, the intensity of effects was similar.

Category 1: JAIPUR MARRIOTT, TREE OF LIFE, CGH EARTH, MAGI HOLIDAYS

To analyse the effects of the pandemic, we first look at the experience of the first three cases mentioned as we observed a greater degree of similarity among them. Although the hotels had to cut back on the salaries and employment and had a large loss of revenue during the initial months of pandemic i.e. in Q2, mirroring the trends observed globally, the hotels are more or less back to their pre-COVID staffing levels indicating that the businesses are gradually picking up momentum. Although two of these were converted into COVID-19 care facilities, none of them received any sort of aid from the government and had resorted to external borrowing. Taking all the precautions for the post lockdown period with the gradual rise in footfall, these hotels are also moving towards new paradigms to attract more clients. For example, Tree of Life Hotels and Resorts are investing in newer properties to gain traction with leisure holiday customers.

Looking at the experience of an international travel agency like Magi Holidays, we see a rather different picture than discussed above. Being a travel agency, by shifting their operations online, they were able to sustain the business during the months of setback and even though a loss in revenue was incurred they found relief in the aids from the government and other agencies. Due to this factor, as well as the already high revenues in the preceding years, staff layoffs and salary cutbacks were not exercised to a large extent. The rapid innovation in ideas, for example, enhancing digital capacities, shift towards domestic tourism, introduction virtual experiences related to religion and health etc., enabled them to stay financially viable even during the pandemic.

Category 2: GRAAMYA, MISTLETOE MUNNAR

These firms were small-scale in nature and worked on community-based models. There were some cutbacks regarding employment and they faced revenue loss from tourism but the effect was not severe in comparison to the large-scale firms due to the fact that as the businesses were locally situated, many employees had additional means of income and different verticals included in the respective businesses helped to sustain and support many employees. Aid from the government was extended to these firms to some extent but we see the reach was not substantial as one of them did resort to the aid from the private sector. At present, all necessary precautions are being taken by these businesses similar to the bigger firms. While Graamya experienced an increase in footfall after the lockdown was lifted, the footfall rise in Mistletoe Munnar was modest.

The responses from both the categories of cases show that, with the complete shift in travel trends due to the COVID-19, the businesses are expected to remodel themselves to a large extent.

Highlighted in the above analysis is that since travel and tourism is seeing a slow recovery rate, firms are making sure that, needs of travelers are more than met. In order to keep customers happy and business going, hotels have started coming out with innovative business ideas such as experiential tourism and virtual tourism (virtual pilgrimages). Similarly, travel firms have increased flexibility with regard to cancellation policies, service rates, schedule modifications, etc. Investments in physical and technological infrastructure will play an indispensable role in not only generating more income and employment opportunities in the industry, but will also help the businesses to find innovative means to bounce back.

An important aspect highlighted by looking at the small travel/tourism businesses is the need for multiple verticals in the business to ensure the diversification of income generation. The businesses that had revenue inflow from other verticals (such as an organic food vertical - Graamya or zero-residual spices vertical - Mistletoe Munnar) kept business afloat during the time when revenue from the tourism vertical was nil.

Another aspect evidenced here is the downfall in leisure tourism, showcased by a boom in budgeted tourism with a focus on experiential and learning-based tourism. As the lockdown lifted and people stepped out of their homes, travelers looked more for experiences. While leisure-based hotels continue to invest in more properties to gain traction, it is evident that the demand for leisure is unrushed, as depicted by low occupancy, in comparison to community-based/experience-based tourism. Finally, as uncovered in the case of Mistletoe Munnar, it was the unresponsive and unsupportive nature of booking agencies that discouraged business and possibly led to loss in revenue. Following that, coordination among the sectors of hospitality, insurance, booking agencies and insurance is absolutely crucial for the recovery of the travel and tourism industry. Supported by greater public-private cooperation, the industry will be able to adapt to evolving health situations by establishing necessary health and safety protocols. This will help also regain the trust and confidence of potential travelers and build future resilience as lockdowns get graded relaxation.

4. How to pandemic-proof the tourism sector?

The emergence of the COVID-19 pandemic has impacted countries and economies worldwide. The measures taken to counter the impact varied significantly around the world, in terms of timing and methods, thus reflecting the diversity of our world, which is itself a very important driver for tourism demand (UNTWO, 2020).

An evolution in tourism demand is expected. The industry may look inwards, pinning hope on domestic tourism, as traveler preferences shift toward the familiar, predicted, and trusted. Domestic tourism is expected to lead the recovery of the industry, anticipating a slow transition to regional and intercontinental tourism (UNTWO, 2020). The trends also depict a push in niche tourism, directed by a heightened awareness among travelers around sustainability and interconnectedness of the world. The growth of niche tourism is also a result of the consciousness among travelers (Darbari, 2020) for traveling in a less risk-prone environment, guided by the lessons from the pandemic, in their respective social bubbles. In response to these trends, several

countries have created travel bubbles or corridors to allow the quarantine-free flow of people within countries with similar recovery trajectories, to keep business flowing and also allowing for testing of the framework for when the borders finally open up.

Current travel and tourism trends show, and evidenced by analysing the prevailing situations of the diverse group of hotel and tourism businesses in the case study, it can be expected, that travelers will cut out mass tourism activity and gravitate towards tourism activities that heighten traveler experience. The demand for luxury hotels and boutiques seems to be sluggish for the coming year, with low occupancy rates which may lead to a drop in tariffs. With this in mind, it is likely that hill and sea resorts, camping and outdoor brands, homestays, wildlife reserves, isolated destinations and experience-filled holidays will win overcrowded favourites of yore. (Krishnan, Mann, Seitzman, & Wittkamp, 2020)

Another versatile sector that has come to light post the emergence of the pandemic are technology and digital participation. As an unexpected catalyst, the innovative use of technology in the travel and tourism industry is likely to give a boost to the sector like never before (UNTWO, 2020). Several existing travel businesses have been seen upgrading their digital capacities and empowering their virtual products. Gamification methods for emotional monitoring, assistance of innovation management software solutions and augmented reality are going to be crucial in the growth of the upcoming era of travel and tourism. ICT readiness and responsiveness will become essential for travel and tourism businesses (Lau, 2020).

With the tourism sector being hardest hit by the pandemic, the role of the government in supporting the sector becomes crucial. World Travel and Tourism Council has urged governments across the world to support and aid the tourism sector by means of the following three areas (i) protecting the livelihoods of the workers by providing financial help to protect the incomes of those workers who have lost their employment or seen a fall in their incomes, (ii) fiscal support like unlimited interest-free loans to the companies in the travel and tourism sector along with small to medium-sized businesses must be extended and a waiver made on the

government dues and financial demands for a minimum of 12 months in the sector and (iii) injecting further liquidity and cash assistance to the sector along with support to the industries impacted critically within the sector (WTTC , 2021).

Although governments across the world have taken steps to restore tourism, there is no magic wand that will reverse the drastic negative effects of the pandemic. While domestic tourism has cushioned the blow, the actual recovery will only take place once international travel picks up. The industry was caught off-guard by the pandemic which led to huge losses and the only way forward for them is to pandemic-proof the tourism and travel industry. The policymakers and the governments across the world can utilize and see this as an opportunity to reboot the sector. It is also a very rare and momentous chance for them to try and build it in a better and more sustainable manner.

5. Conclusion

Throughout the paper we observe that the restrictions in travel and healthcare precautions due to the onset of the Covid-19, has had a drastic effect on the travel and tourism industry. The countries highly dependent on tourism were heavily affected with fall in growth rates and output (Section 3). The trend of four indicators studied gives further evidence for the decline in tourism activities as all the trends show a deep fall during the initial months of virus spread, travel restrictions and lockdown and almost all these trends are observed in the case studies further validating the contraction in the sector. Although, certain level of recovery is being observed in the subsequent months, the pre-pandemic levels are yet to be reached. The growth rate projection for the coming years show an upward trajectory however small (Section 3). With an in-depth on-ground analysis of the various businesses in the industry via our case study, several trends have been identified that are expected to lead the way through the recovery and beyond (Section 4). The measures taken to counter the impact have been highlighted in Section 5 which emphasises that the main focus should be on a sustainable recovery for tourism, a greener tourism system while re-evaluating tourism for the future.

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