RECOVERY OF TOURISM AFTER THE COVID-19 CRISIS

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Resumen

The article aims to analyse the recovery of the tourism industry after the COVID-19 crisis. For this purpose, it compares data from six indices (aviation, hotel, pandemic, interest, mobility and overall) in the ten most important tourist destinations by volume of arrivals to the UNWTO: France, Spain, the United States, China, Italy, Turkey, Mexico, Germany, Thailand and the United Kingdom. The results of the study show that some countries have regained pre-COVID-19 data in some indices. The aviation index shows that Mexico and Turkey have restored their air mobility. The hotel index establishes a recovery of hotel performance in China and Mexico. The pandemic index reflects that China is free of COVID-19. Public interest in resuming travel is close to full recovery in the UK. The mobility index is the best performer, with a return to normality in France, the United States, Italy, Turkey, Germany and the United Kingdom. The overall index for tourism highlights Mexico as the leading country in the recovery of the tourism industry. The study concludes with a reflection on the evolution that this recovery is taking and on the opportunity presented by the planning of a new, more sustainable tourism model.

Palabras clave: tourism; COVID-19; Recovery; comparative indexes; top 10 destinations.

1 Introduction

Mobility restrictions linked to the SARS-COV-2 pandemic (COVID-19) led to a worldwide drop in tourism. The 2020s were characterised by a period of border closures that directly affected all tourism sectors (Gössling, Scott and Hall, 2020). The airline industry cut flights by up to 90% (Carter et al., 2021). Capacity and capacity constraints in the hotel sector force a lower capacity opening at a loss and most likely unprofitable reopening (Tsionas, 2020). Some pandemic constraints have even led to restaurants being closed or allowed to sell takeaway food only, forcing them to operate below capacity (Carter et al., 2021). But it has been the cruise industry that has been most affected by the crisis, with the total cancellation of the activity and a more complex approach to return to normality due to constraints such as social distancing (Sharma, A., & Nicolau, 2020).

Mobility favoured the transmission of the virus and the tourist became a vector for the transmission of the disease, as occurred on the Ruby Princess and MS Westerdam cruise ships or in the ski resorts of Ischgl (Austria) or Aspen (USA) (Iaquinto, 2020).

Predictions of future impacts set a 78% drop in tourism resulting in 1.2 trillion dollars in losses and a decrease in tourism employment with 120 million redundancies (Sigala, 2020). The economic impacts have not been the only ones at the centre of this stage; COVID.19 has been characterised by socio-psychological impacts that can be decisive in the long term for the tourism industry (Roy and Sharma, 2020).

Despite this, the tourism industry has proven to be resilient to previous crises, such as the 2008 economic crisis, SARS 2000 or natural disasters such as tsunamis or volcanic erosion. It is therefore considered that tourism will easily recover from COVID-19 (Ioannides and Gyimóthy, 2020; Jiricka-Pürrer, Brandenburg and Pröbstl-Haider, 2020; Gössling, Scott and Hall, 2020).

Recovery requires adaptation of the tourism sector. Some articles highlight the changes that the tourism industry has undergone due to COVID-19. In the short term, it has been observed that the perceived risk of contagion has led to changes in travel patterns, there is now an intention to reduce length of stay (Li, Nguyen and Coca-Stefaniak, 2020), there is an increased use of private transport to prevent public transport crowds (Jiricka-Pürrer, Brandenburg and Pröbstl-Haider,

2020; Wen et al., 2020) and short-haul and proximity tourism is on the rise (Mackenzie and Godnow, 2020).

The inequality of impacts in space and time suffered by different tourist destinations (Sigala, 2020) motivates the development of this article, which aims to compare the degree of recovery of the tourism industry in the ten most relevant tourist destinations in terms of tourist arrivals according to the World Tourism Organisation. The aim is to determine whether the tourism situation is close to what it was before the pandemic. To this end, section 2 on method will explain the indices used for the comparison, as well as the countries studied and the data sources. Section 3 analyses the results obtained in the comparison in order to visualise the extent to which each country is recovering. Finally, section 4 presents the conclusions of the study in order to highlight where the tourism industry is heading.

2 Method

The method used in this study is the comparison of indices on the resilience of the tourism industry in the aftermath of the COVID-19 pandemic. Due to the repercussions of COVID-19 and the impact it has had on tourism, Yang et al. (2020) of Temple University developed an analytical tool called the "COVID-19 tourism index" to monitor the impact of the pandemic on tourism and to monitor its recovery. It is an essential tool for policy makers because of the information it provides. It allows to visualise by country the degree of recovery of the tourism industry through numerical values where 100 means a return to the pre-COVID-19 situation.

The "Covid-19 tourism index" is composed of 5 sub-indices, the aviation index, measured in departure volumes, the hotel index, based on daily hotel performance data, the pandemic index represented by new cases of the virus, the interest index measured in online travel searches and the mobility index.

The data for the calculation of the indices are extracted from STR for hotel performance, the International Civil Aviation Organization (ICAO) database for airport departures, Google Trens for daily travel search, Google Mobility Tracker to extract daily mobility data, the European Centre for Disease for daily contagion data and UNWTO to collect historical prevention, control, arrivals and historical tourism revenue data.

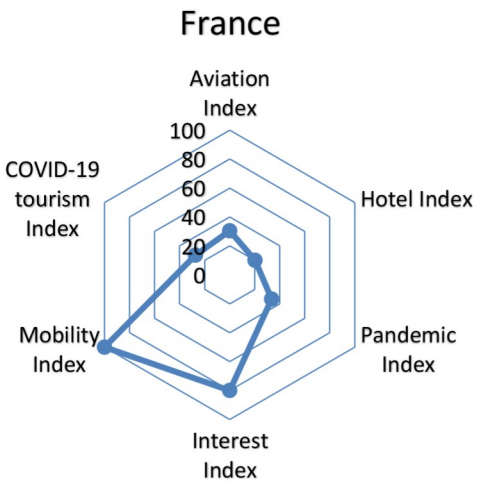
For the development of this index Yang et al. (2020) perform three different sensitivity analyses, one on index methodologies using alternative aggregation methods (arithmetic mean and harmonic mean), one to calculate the adjustment factor and one in which the overall index is calculated with the 5 sub-indices. The interest and mobility sub-indices were finally excluded for the calculation of the overall index due to the lack of data availability in countries with a low market share of Google products.

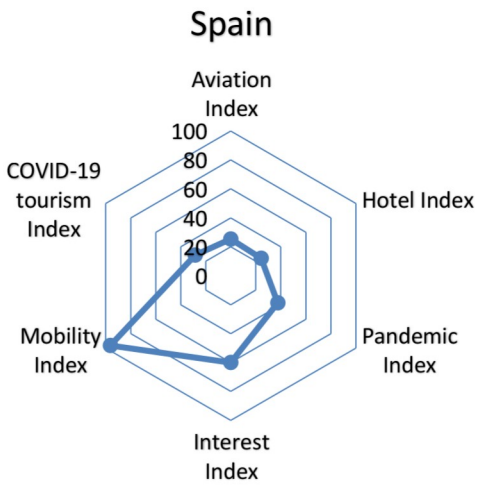
The data has been extracted as of 5 June 2021, as a forecast for the 2021 summer season, for the 10 most visited tourist destinations according to the 2019 edition of the International Tourism Highlights produced by the World Tourism Organization (UNWTO); France, Spain, United States, China, Italy, Turkey, Mexico, Germany, Thailand and United Kingdom. The indices are represented in relative value, so a value of 100 would indicate a full recovery in that area. The following section presents the results of the analysis carried out.

3 Results

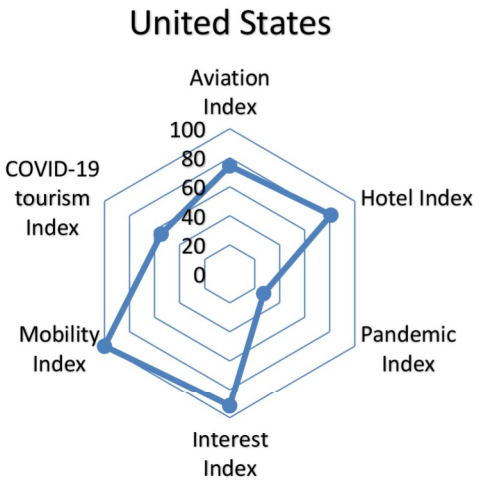
The aviation, hotel, pandemic, interest, mobility and tourism indices for each destination; France, Spain, USA, China, Italy, Turkey, Mexico, Germany, Thailand and UK have been plotted using star charts and the results are shown below.

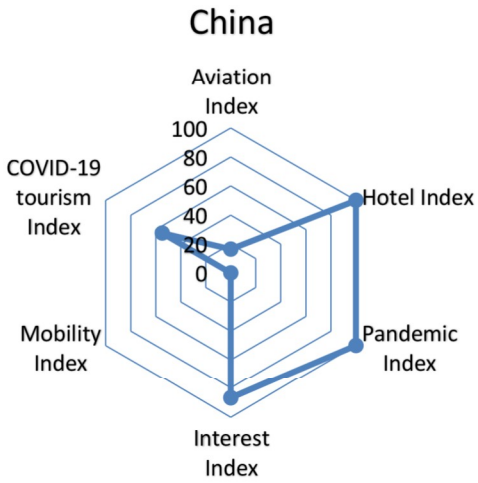
Figures 1 and 2: Recovery of tourism in France and Spain. Own elaboration.



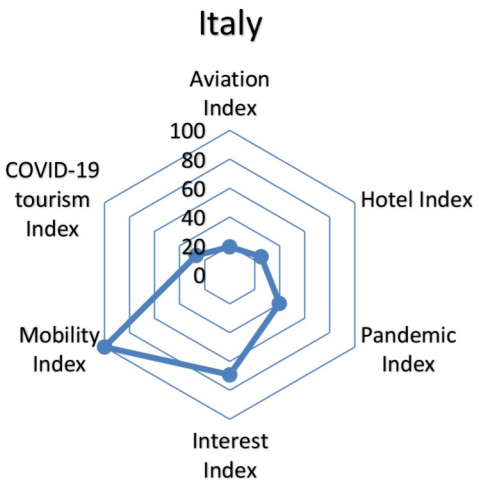


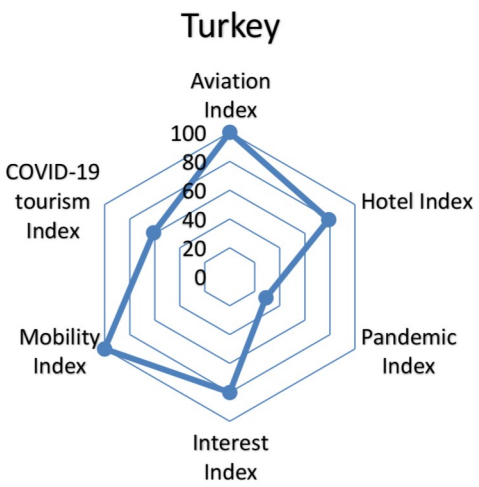
Figures 3 and 4: Recovery of tourism in the United States and China. Own elaboration.



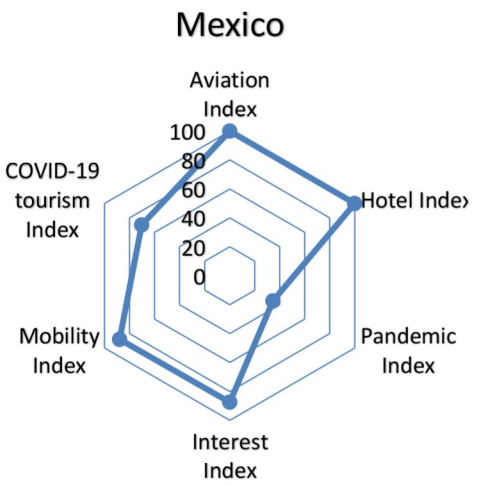


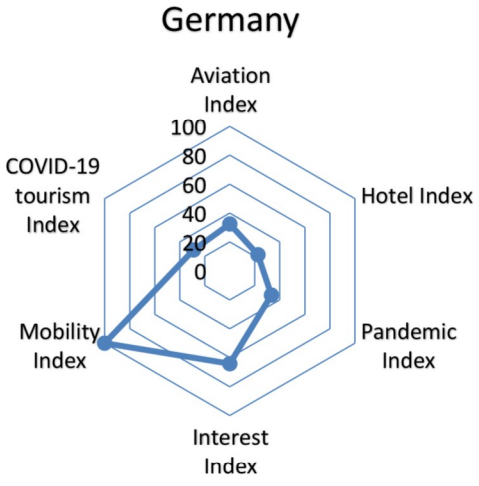
Figures 5 and 6: Recovery of tourism in Italy and Turkey. Own elaboration.



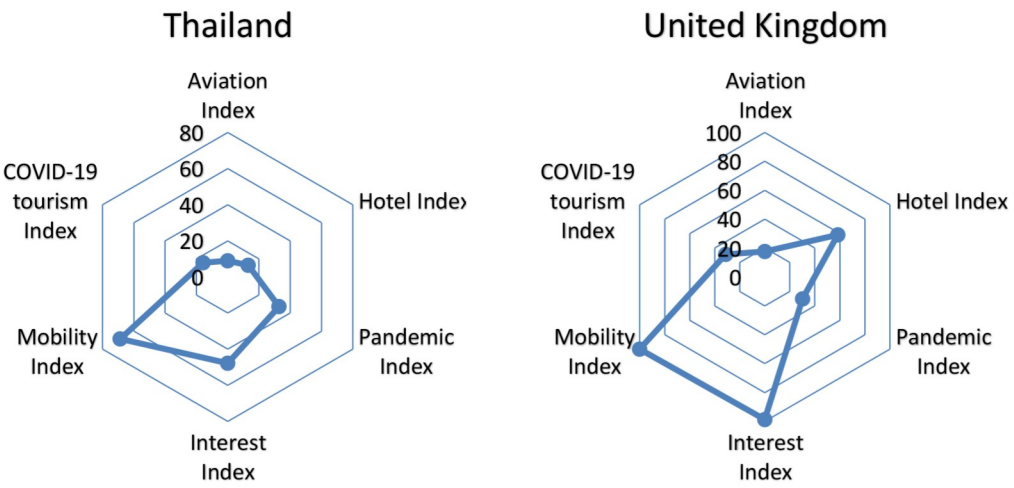


Figures 7 and 8: Recovery of tourism in Mexico and Germany. Own elaboration.





Figures 9 and 10: Recovery of tourism in Thailand and United Kingdom. Own elaboration.



Air movement, as measured by flight departures, shows similar data to pre-pandemic levels for Mexico and Turkey, followed by the United States with a score of 74.43. The rest of the countries analysed are far from reaching this situation, with scores ranging from 8.97 for Thailand to 32.42 for Germany. The rest of the countries analysed are far from this situation, with scores ranging from 8.97 points for Thailand to 32.42 for Germany.

Hotel performance shows the highest scores in China and Mexico. The remaining countries can be classified into two groups: on the one hand, Thailand, France, Germany, Spain and Italy, with scores ranging from 13.08 to 25.13 points and far from optimal hotel performance, and on the other hand, the United Kingdom, Turkey and the United States, with 58.29, 79.04 and 81.01 points respectively, which are closer to a normal hotel situation.

The pandemic index, which shows the incidence of COVID-19 cases in the country, obtains low scores ranging from 27.19 to 39.85 points in all countries, with the exception of China, which with 100 points would be classified as COVID-19 free.

People's interest in resuming travel is high in countries such as the United Kingdom, the United States, Mexico, China, Turkey and France, where it exceeds 80 points. In countries such as Italy, Germany, Spain and Thailand, travel demand is not yet comparable to what it was before COVID-19.

The data depicted show a full recovery, 100 points, in the mobility index for France, the United States, Italy, Turkey, Germany and the United Kingdom, i.e. the daily mobility recorded in these countries via Google Mobility Tracker is similar to what it was before COVID-19. In the case of Spain, Mexico and Thailand, with scores of 96.31, 87.93 and 68.64 points respectively, mobility has not yet fully recovered. For China this data is not available.

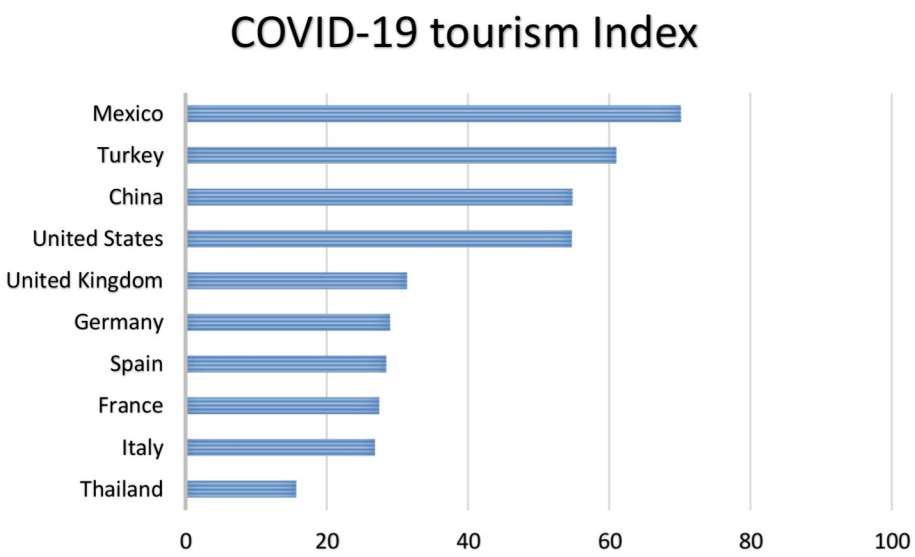


Figure 11: Overall index. Own elaboration.

The COVID-19 tourism index (overall index) is calculated taking into account the aviation, hotel and pandemic indices. Full recovery does not occur in any of the countries analysed. Mexico is in the lead in the process of restoring its tourism activity to a situation similar to what it was before COVID-19, followed by Turkey, China and the United States, all of which score at least half as well. The worst situation is found in Thailand, which seems to be far from restoring its tourism industry.

4 Conclusion

The article analyses the current situation of the 10 most important tourist destinations by volume of arrivals according to the UNWTO. The recovery of tourism activity in these destinations is only halfway through. This assessment has been carried out while the COVID-19 pandemic was still active, so in the short term some indices have already recovered their pre-pandemic situation, but other aspects still have a long way to go. Factors such as quarantine, the need for a negative COVID-19 test or vaccination influence tourism recovery and could be addressed in future research to analyse their correlation. COVID-19 has transformed tourism activity. Tourists have changed travel patterns (Ioannides and Gyimóthy, 2020) and these changes may be here to stay. This pandemic situation can be used as a starting point to recover tourism activity from a new, more sustainable tourism model, it is an opportunity to collectively learn from this crisis and transform tourism activity (Renaud, 2020; Sheller, 2020; Ioannides and Gyimóthy, 2020; Gössling et al., 2020; Mackenzie and Goodnow, 2020; Zielinski and Botero, 2020; Wen et al., 2020).

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