
FROM GROWTH, TO CHAOS, TO UNCERTAINTY: THE IMPACT OF THE COVID-19 PANDEMIC ON EUROPEAN TOURISM

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Abstract

The tourism industry has witnessed an unprecedented growth in recent years. According to the World Travel and Tourism Council, at a global level, the tourism sector accounted for 10.4% of global GDP and 10% of total employment, being one of the strongest drivers for economic growth since the global crisis in 2008. However, an unforeseen global event shook the entire world from its roots: the occurrence and rapid spread of the COVID-19 virus has created a huge shock for the global economy, having a drastic impact on individuals' everyday lives, as well as their mental health. Economic insecurity, social distancing, unemployment, illness and anxiety seem to be the words to define 2020 so far. The purpose of this scientific paper is to review different aspects of the negative impact of the COVID-19 outbreak on the tourism sector in Romania and discuss a set of recommendations for the restart of tourism post-crisis. The paper adopts a qualitative research design, drawing on in-depth interviews with officials from the Romanian central tourism authority to assess the current situation of Romania in the larger European context.

Keywords

COVID-19; pandemic; European tourism; Romanian tourism; crisis; economic depression

JEL Classification

Z30, Z31, Z32, Z33, Z38, L83, L88, M10, O52, P43

Introduction

The coronavirus has dramatically disrupted all aspects of human life at a global level, completely redefining the concept of “normality” and leading economies on the verge of collapse within a matter of weeks (Mair, 2020). Since it first occurred in Hubei, China late December 2019, COVID-19 has rapidly spread worldwide, causing a global pandemic that

has killed approximately 250.977 people, as reported by The European Centre for Disease Prevention and Control on the 5th May 2020. (Our World in Data , 2020)

The virus has not only raised unprecedented challenges for healthcare systems, but has also had a dramatic socio-economic impact worldwide, forcing states to take extreme measures, including lockdown of citizens, prohibition of public gatherings, closing schools, interruption of businesses and introduction of border/ travel restrictions. (European Tour Operators Association, 2020, p. 2)

Even though vital to slowing down the spread of the virus, the restrictive measures have had a high social and economic cost – “whole sectors are closed down, connectivity is significantly limited and international supply chains and people’s freedom of movement” have been severely affected. (European Tour Operators Association, 2020, pp. 2-3) Europe’s tourism has been widely affected by the coronavirus crisis, The European Commission estimating that hotels and restaurants across the European Union will lose half their income in 2020. (Henley, 2020)

This research paper is an analysis of the current state of EU tourism, prediction of financial repercussions of the Covid-19 crisis on the tourism industry and recovery forecast. The literature review will focus on the impact of the COVID-19 crisis on European tourism, with all its different branches, including flight operators, tour operators, hotels and F&B facilities. The primary research consists of a case study analysing Romanian tourism in the current European context, based on published data from official sources, as well two in-depth interviews with officials from the tourism central authority from Romania.

Tourism pre-COVID-19 outbreak

The tourism industry has been identified as one of the strongest drivers for economic growth, bringing a huge contribution to the recovery of the global economy after the 2008 financial crisis. (World Travel and Tourism Council, 2019) According to the World Travel and Tourism Council, at a global level the tourism sector accounted for 10.4% of the global GDP and 10% of the total employment, meaning a total of 319 million jobs in 2018 (World Travel and Tourism Council, 2019).

As Europe is a strong tourist destination, the European Union places tourism as an important tool for economic growth for its Member States (Lee and Brahmašre, 2013). Globally, many countries focused on tourism development, as a mean or a strategy for economic prosperity and growth (Matarrita-Cascante, 2010). According to a European Travel Commission (ETC) press release on the 24th of April 2020, the Member States of the EU represent the most popular tourist destinations worldwide, in terms of receipts from international tourists (ETC, 2020). In 2019, a total of 427 billion euros were spent in tourism related activities in the EU, equivalent of 6,2% of EU’s total exports and 27 million jobs were related to the travel & tourism field, demonstrating the importance of tourism for the European economic growth (ETC, 2020).

The World Tourism Barometer, published by UNWTO in January 2020 states that “growth in tourist arrivals continues to outpace the economy”, increasing by 4% in 2019 - in real numbers meaning an increase of 1.5 billion overnight visitors (UNWTO, 2020b). As a highlight, France has registered the biggest increase in international tourism expenditure (UNWTO, 2020b). The UNWTO World Tourism Barometer also stated that for Europe, the most visited destination in the world, tourism in the region was largely fueled by intraregional demand (UNWTO, 2020b).

Tourism directly contributes 4.4% of GDP, 21.5% of service exports and 6.9% of employment in OECD (Organisation for Economic Co-operation and Development) countries, which makes it an important tool for economic growth. According to the OECD Tourism Trends and Policies publication, the continued growth of tourism provides real forecasts for sustainable development (OECD, 2020c).

Tourism post-COVID-19 outbreak

According to the International Monetary Fund, because of the COVID-19 crisis “the world economy is on track to record its worst years since the Great Depression of the 1930s.” (Tidey, 2020) Economists have expressed their concern that a prolonged lockdown could lead the global economy into collapse. (Mair, 2020)

With the world’s economy being on the verge to collapse, the UN World Tourism Organisation has raised warnings that the tourism industry is going to be “one of the hardest-hit by the outbreak of COVID-19.” (Tidey, 2020) Even though all European countries will suffer severe losses because of the outbreak, especially those that are very tourism-centric, the three most heavily-affected countries will be Italy, Spain and France. (Tidey, 2020)

The hospitality industry, as part of the tourism industry is being equally affected by different kinds of hazards, being deeply vulnerable to the negative impact of disasters (Ivkov et al., 2019). The hit of the COVID-19 outbreak deeply affected the economic operators in the hospitality industry, as this disease is easily transmitted between individuals; the vulnerability of the tourism sector comes from the fact that the human factor, both employees and clients, is part of the tourism product itself (Malhotra et al, 2009).

According to UNWTO, the outbreak of coronavirus placed all countries on lockdown, with 100% of global destinations adopting restrictions on travel and 72% of the world’s destinations completely closing their borders to foreign tourists (UNWTO, 2020a). Due to the temporary travel restrictions, there are very few new bookings for tourism services. At the same time, the industry is flooded with claims for refunds in the case of cancellations and claims for compensation in the case of non-performance of a service.

OECD estimates that the coronavirus impact on the sector will be up to 45% decline in international travel in 2020 and could get to 70% if the recovery process does not start in July and starts in September, highlighting that even if domestic tourism is also heavily impacted by the virus outbreak, this is subject to a considerably easier and quicker recovery (OECD, 2020b).

According to a recent Ministry of Economy, Energy and Business Environment press release regarding the videoconference of the ministers responsible for tourism in the EU Member States, organized by Croatia on the 27th of April 2020, the interventions of the high representatives at the virtual reunion focused on a few key points: the need to allocate budgetary funds dedicated to supporting the tourism industry in the context of the crisis caused by the outbreak of the new coronavirus; the need to facilitate transport connections to support mobility; the need to establish measures to protect both consumers and tourism operators; the need to elaborate a European strategy that will support the crisis exit and the resumption of tourism, in order to ensure a set of coordinated measures and hygiene standards valid at a EU level (Ministry of Economy, Energy and Business Environment, 2020a).

Research methodology

This paper adopts a qualitative research design. Results are presented as a case study, based on both published data from official sources and information collected through a total of two in-depth interviews with industry officials from the tourism and hospitality industry in Romania. Quotes from the interviews are used in the case study to introduce new details on a global issue that was ongoing at the time when this research was conducted.

Case study research

Researchers identify two main functions of case studies in scientific research: an explanatory function, where there already is a large body of published material on the subject and the case study is used to demonstrate that the referenced “theory has a practical application”; and an exploratory function, used to discover and explore new relevant “factors or issues.” (Myers,

2013, pp. 75-76) Given the fact that the COVID-19 pandemic is an ongoing issue and its impact on tourism is history in the making, the present paper makes use of case study research for exploratory purposes.

Structured interviews

Structured interviews have been used as a qualitative tool to collect new ideas on the present subject. In order to obtain valuable information on the same issue, but from different perspectives, the respondents have been chosen based on their current positions, as well as previous professional experience: they both have a vast experience in the tourism industry and occupy high-level positions in governmental institutions responsible for tourism and hospitality in Romania, but their area of expertise, as well as their roles are different. The first respondent is Emil-Răzvan Pîrjol, who has been the Secretary of State for Tourism within the Ministry of Economy, Energy and Business Environment since December 2019. The second respondent, George Bogdan Borună is the Director of the Control Directorate within the Ministry of Economy, Energy and Business Environment, the central authority responsible for tourism in Romania.

Case study: Romanian tourism in the current European context

Just like global tourism, Romanian tourism has also recorded considerable growth in recent years, predicted to develop even further before the coronavirus crisis stroke. According to OECD the overnights demonstrated an important growth in the last 10 years in Romania: international ones have gone from 1.6 million to 2.8 million, which represents 87% growth, while the domestic overnights increased from 10 million to 16.5 million (65% growth) between 2008 and 2018 (OECD, 2020a).

The contribution of tourism to GDP in Romania is of 2.8%, equivalent of 23.9 billion RON and the employment in tourism represents 4% of the total employment in Romania, the sector supporting directly 373.074 jobs in 2017 (OECD, 2020a).

It seems like not too long ago, industry specialists were constantly complaining about the work force crisis in Romania as the most pressuring issue affecting the tourism industry, claiming that nothing could possibly be worse than having a growing number of tourists, but not enough qualified staff to deliver the desired customer service to satisfy those tourists. And then the COVID-19 crisis happened, proving everyone wrong.

Starting on the 5th March 2020, at the level of the Tourism General Directorate from the Ministry of Economy, Energy and Business Environment a crisis cell has been established in order to, on the one hand, manage and propose solutions to support the economic operators in tourism, strongly affected by the spread of COVID-19, and on the other hand, help tourists. This crisis cell, made up of specialists from within the institution, constantly monitors and analyses the reported issues, making sure that they are solved in due time, in the best interest of those involved (Ministry of Economy, Energy and Business Environment, 2020b).

According to the first respondent, Mr. Emil-Răzvan Pîrjol, „the hospitality industry is an industry of peace, so therefore times of “war”, of personal insecurity do push tourism and leisure in an abrupt full lock-down”. In terms of numbers, he said that the revenue went down by 90% to 100% and that the Government offered aid for businesses, so up to the time of the study no bankruptcy was announced.

In an open letter that the Romanian Federation of Hotel Industry addressed to the Romanian Government on the 21st of March 2020, the associative entity stated that the current situation is one of the most difficult that the hospitality industry has ever faced, the negative impact generated by the coronavirus pandemic affecting it more seriously and much faster than any other disruptive event in the last 30 years. The impact that the coronavirus crisis has had on tourism, discussed in detail in the Literature Review, is also seriously affecting Romania:

according to the open letter, 62.5% of the hotels in country intend to close their doors indefinitely (FIHR, 2020).

When asked about the recovery time that tourism will need to return to the pre-crisis status quo, the secretary of state for tourism replied that it could take up to 24 months to re-establish the pre-pandemic level, if we refer to the recovery time after the 9/11 crisis and Lehman Brothers bankruptcy as an example.

Just like other EU countries, Romanian companies also face difficulties regarding liquidity availability as an effect of the numerous requests for refunds for the cancelled trips, because of the impossibility to travel under the current circumstances. Therefore, the Romanian central tourism authority publicly recommends that travellers consider accepting the delay of their trips at a later time. This could be done through so-called "travel certificates"/"credit notes" equal to the value of the reserved or paid packages, which can be used at a later date (Ministry of economy, energy and business environment, 2020c).

As previously discussed in the Literature Review, most of the countries have taken measures to mitigate the strongly negative impact of the COVID-19 outbreak on the tourism sector, by providing protection for employees and supporting liquidity for businesses (OECD,2020b).

The economic measures taken by the Romanian Government are mainly in relation to the support of business environments, especially micro-enterprises and SMEs, by providing help for companies' liquidity, financial protection for employees, state loans and guarantees, as well as suspension of payments of loans, credit lines and installments, for up to 9 months (Emergency Ordinance no. 2020/29, 2020) (Emergency Ordinance no. 2020/37, 2020).

Given the difficulties that businesses in the tourism industry have been facing in terms of activity continuity during the COVID-19 crisis, some of these were unable to keep their employees. As a result, the Romanian Government has decided to pay the technical unemployment, with a maximum value of 75% of the average gross salary. These measures will benefit the category of employers that have been directly affected by restrictive measures, such as hotels, restaurants, cafes and entertainment institutions or other companies that can prove that their business has registered losses of at least 25% (Emergency Ordinance 2020/23, 2020).

Another measure that the Ministry of Economy, Energy and Business Environment has taken is that of granting holiday vouchers to both private and public sector staff to cover expenses incurred in resting on domestic tourism. Because given the current context individuals are unable to use these, the Government of Romania has decided to extend the validity of the vouchers until May 31, 2021 (Emergency Ordinance 2020/822, 2020).

In terms of recovery, when asked about what tourism will look like after the COVID-10 crisis ends, Emil-Răzvan Pîrjol replied that people will most certainly consume tourism as a product differently. As our social life will be subject to change, the near future will be more digital and local, tourists will travel mostly by car, so there is hope for recovery of domestic tourism or international travel, but on short distances. Regarding the timing of the restart of tourism, he said that „it will be for sure scheduled, in terms of countries, regions and type of businesses”. The second respondent, Mr. George Bogdan Borună, Director of the Control Directorate within the Ministry of Economy agreed: he claimed that tourism will most certainly not be the same. “No one should expect us to be able to have holidays the way we used to. New safety measures will be put in place, which will most certainly change the experiences we had up to this point. I believe that there will be an increase in individual tourism, avoiding travelling in groups. There will be changes, but the important thing is that tourism will not stop,” he said.

When asked about a timeframe for relaxation on confinement measures taken already by other countries, Mr. Pîrjol said that “nothing is too soon or too late if we consider health threats. It is important not to lose the efforts and sacrifices we all made in these past few months” and

that a re-opening in the wrong conditions and safety environment could throw everyone back to restrictive measures, which will mean very low chances to re-boost tourism in 2020.

Talking about measures that should be taken in order for accommodation units and F&B facilities to re-start their activity in Romania, Mr. Borună argued that a post-crisis strategy will have to be put in place for the entire economy, as it would be impossible to re-launch one sector only.

Conclusions

The question is, what is the future of European tourism? Realistically, no one can provide a definite answer at this point, since what we are witnessing is very much history still in the making. However, one thing is certain: even though individuals are desperate to return to their normal lives, one must accept that moving forward will not be easy and actions need to be taken with caution.

In Romania, after 60 days of declared State of Emergency (President Decree no. 195/16.03.2020 and no. 240/14.04.2020), on the 15th of May the country will enter an alert state, in which there will be a relaxation of some of the restraining measures. This means that certain activities will resume: trade will be partially opened; personal care salons, museums and probably parks will reopen for public access; the obligation to stay at home and to make a declaration when travelling inside the locality will be waived but however, in the first stage, travelling outside the locality, with some exceptions, will still be forbidden. (Presedintele Romaniei, 2020)

The World Tourism Organization has released a set of 23 recommendations in order to support the tourism stakeholders to surpass the COVID-19 pandemic. These are divided into 3 main pillars: crisis management and impact mitigation; stimulus provision and acceleration of recovery; preparedness for the future (UNWTO, 2020a).

A Communication of the European Commission, released on the 13th of May, stated that the tourism ecosystems should not be lost for the next several months and that Europeans could get some well-needed rest and time spent with family and friends when travelling inside their countries or abroad, if the relaxation measures are handled correctly, in a safe and coordinated manner across the EU (European Commission, 2020).

Although it is difficult to predict what will happen with Romanian tourism in the foreseeable future, based on the different papers and studies published so far, as well as the answers of the interviewed officials, it could be concluded that the re-launch of tourism in the post-COVID-19 crisis would need to follow a sequence of stages: i) a phased re-opening should be considered in order to avoid new outbreaks of the virus, ii) economic measures to mitigate the impact of COVID-19 on businesses should be maintained during the recovery phase, iii) regaining the confidence of tourists to travel again is essential and iv) focus on increasing domestic tourism flows in order to re-boost the sector.

With a clearer view on how interdependent our world is, the tourism industry will survive, but the specific activities may be very different and most probably the way people act and what they value after the crisis will drive new public policies and stimulate new services and tourism products (ETOA, 2020).

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