

РОЗДІЛ 4. РОЗВИТОК ПРОДУКТИВНИХ СИЛ
І РЕГІОНАЛЬНА ЕКОНОМІКАORGANIZATION OF TOURISM TRAVEL
AFTER THE CRISES PHENOMENA RELATED TO SARS-CoV-2ОРГАНІЗАЦІЯ ТУРИСТИЧНИХ ПОДОРОЖЕЙ
ПІСЛЯ КРИЗОВИХ ЯВИЩ, ПОВ'ЯЗАНИХ ІЗ SARS-CoV-2

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In the article the research of tourism sphere and crisis phenomena, which caused decrease in tourist travels, is carried out. It has been established that the tourism industry is one of the most important indicators of socio-economic development, both of individual regions and of the country as a whole. But due to the limitations caused by the spread of the SARS-CoV-2 pandemic, the tourism industry is facing a crisis that may be the worst in the history of the world economy. It is pointed out that during the pandemic caused by COVID-19 it is tourism that has suffered more, including restrictive measures imposed by states on the movement of citizens, quarantine, airline travel bans, etc. A detailed analysis of travel statistics index in the world and Ukraine has been conducted. Ways out of the crisis situation for the tourism sector of Ukraine, the implementation of which will reduce the level of negative impact of the pandemic effects associated with SARS-CoV-2, are proposed.

Keywords: tourism industry, tourist travel, crisis phenomena, management, tourism enterprise, pandemic.

В статті проведено дослідження сфери туризму та кризових явищ, що спричинили зменшення туристичних подорожей. Проаналізовано негативні явища в туристичній індустрії, які відбулися внаслідок поширення інфекційної хвороби, спричиненої вірусом SARS-CoV-2. Зазначено, що внаслідок поширення вірусної пандемії, спричиненої SARS-CoV-2, відбулося падіння світової економіки, обсягів торгівлі та цін на товари та послуги, вплив капіталу з нових ринкових економік. Якщо найближчим часом не буде вжито термінових заходів, то сфера туризму зіштовхнеться з економічним крахом, з якого буде складно вийти, а мільйони людей, що працюють у сфері туризму, залишаться без роботи. А тому, наразі, існує потреба у розробці шляхів виходу з кризи, яка з'явилася внаслідок поширення інфекційної хвороби спричиненої вірусом SARS-CoV-2. Встановлено, що індустрія туризму є одним з найважливіших показників соціально-економічного розвитку, як певних регіонів так країни загалом. Але у зв'язку із обмеженнями, що спричинені поширенням пандемії, пов'язаної із SARS-CoV-2, сфера туризму постала перед кризою, яка може виявитися найгіршою в історії світової економіки. Указано, що під час пандемії, спричиненої COVID-19, саме туризм постраждав найбільше, зокрема через обмежувальні заходи, які запроваджують держави на пересування громадян, карантин, заборону авіаперевезень тощо. Проведено детальний аналіз статистичних показників щодо туристичних подорожей у світі та Україні. Зазначено, що через пандемію спричинену COVID-19, світовий туристичний сектор у 2022 році може недорахуватися третини прибутків, запланованих на цей період. Розглянуто заходи щодо пом'якшення наслідків виходу з кризи в Україні, які пропонуються експертами туристичної галузі. Надано пропозиції щодо шляхів виходу з кризової ситуації для туристичної сфери України, реалізація яких дасть змогу знизити негативні наслідки, пов'язані з SARS-CoV-2, серед яких основними мають стати – державна підтримка підприємницьких ініціатив у сфері туризму, розширення сервісних послуг в мережі Інтернет, зокрема удосконалення процесів бронювання та резервування.

У статті проведено дослідження сфери туризму та кризових явищ, що спричинили зменшення туристичних подорожей. Проаналізовано негативні явища в туристичній індустрії, які відбулися внаслідок поширення інфекційної хвороби, спричиненої вірусом SARS-CoV-2. Зазначено, що внаслідок поширення вірусної пандемії, спричиненої SARS-CoV-2, відбулося падіння світової економіки, обсягів торгівлі та цін на товари та послуги, вплив капіталу з нових ринкових економік. Якщо найближчим часом не буде вжито термінових заходів, то сфера туризму зіштовхнеться з економічним крахом, з якого буде складно вийти, а мільйони людей, що працюють у сфері туризму, залишаться без роботи. А тому, наразі, існує потреба у розробці шляхів виходу з кризи, яка з'явилася внаслідок поширення інфекційної хвороби спричиненої вірусом SARS-CoV-2. Встановлено, що індустрія туризму є одним з найважливіших показників соціально-економічного розвитку, як певних регіонів так країни загалом. Але у зв'язку із обмеженнями, що спричинені поширенням пандемії, пов'язаної із SARS-CoV-2, сфера туризму постала перед кризою, яка може виявитися найгіршою в історії світової економіки. Указано, що під час пандемії, спричиненої COVID-19, саме туризм постраждав найбільше, зокрема через обмежувальні заходи, які запроваджують держави на пересування громадян, карантин, заборону авіаперевезень тощо. Проведено детальний аналіз статистичних показників щодо туристичних подорожей у світі та Україні. Зазначено, що через пандемію спричинену COVID-19, світовий туристичний сектор у 2022 році може недорахуватися третини прибутків, запланованих на цей період. Розглянуто заходи щодо пом'якшення наслідків виходу з кризи в Україні, які пропонуються експертами туристичної галузі. Надано пропозиції щодо шляхів виходу з кризової ситуації для туристичної сфери України, реалізація яких дасть змогу знизити негативні наслідки, пов'язані з SARS-CoV-2, серед яких основними мають стати – державна підтримка підприємницьких ініціатив у сфері туризму, розширення сервісних послуг в мережі Інтернет, зокрема удосконалення процесів бронювання та резервування.

Ключові слова: індустрія туризму, туристична подорож, кризові явища, менеджмент, туристичне підприємство, пандемія.

уменьшение туристических путешествий. Установлено, что индустрия туризма является одним из важнейших показателей социально-экономического развития, как отдельных регионов так страны в целом. Но в связи с ограничениями, вызванными распространением пандемии, связанной с SARS-CoV-2, сфера туризма предстала перед кризисом, который может оказаться худшей в истории мировой экономики. Указано, что во время пандемии, вызванной COVID-19, именно туризм пострадал больше, в том числе через ограничительные меры, которые вводят государства на передвижение граждан, карантин, запрет авиaperевозок и т.п. Проведен анализ статистических показателей по туристическим путешествиям в мире и Украине. Предложены пути выхода из кризисной ситуации для туристической сферы Украины, реализация которых позволит снизить негативные последствия после SARS-CoV-2.

Ключевые слова: индустрия туризма, туристическая поездка, кризисные явления, менеджмент, туристическое предприятие, пандемия.

Introduction. Because of the pandemic coronavirus world tourism industry by the end of 2020 might lose 21 trillion dollars of income [1]. These are the data of a study published by the World Travel and Tourism Council (WTTC). Travel restrictions and quarantine put 75 million of workplaces worldwide at risk because of Coronavirus. The biggest number of workplaces that is predicted to be lost – 48.7 million of workplaces in the Asia-Pacific region. 10 million of workplaces may disappear in Europe and the USA

[2]. It is stated that the tourism and travel sector is responsible for about 10.4% of world GDP. During the coronavirus pandemic, it was tourism that suffered more, including restrictive measures imposed by states on the movement of citizens, quarantine, air travel bans, etc. If urgent measures are not taken soon, the travel and tourism sector will face an economic collapse from which it will be difficult to recover, and millions of people working in tourism industry will lose their job. Therefore, there is an urgent need to

develop ways to overcome the crisis resulting from the spread of infectious disease caused by the SARS-CoV-2 virus. Considering the above-mentioned, this question is relevant and requires research analytical and practical developments.

Literature review. Tourism industry development issues are not new and have been researched by many scholars, academics and researchers. But the changes in the world economy caused by the pandemic creates a necessity for providing qualitative new research in the tourism industry. Considering the analysis of the information stated in the literary sources and the Internet, among the researchers of the tourism sphere should be highlighted the work of A. Romanova, an expert on tourism development, who believes that “now it is time to realize that the tourism industry generates 10.4% of the global gross product (GDP) and provides jobs for every tenth inhabitant of the planet. But in Ukraine's own tourism industry is a little weak, outbound tourism (imported services) prevails significantly “and notes that” the very first sector of the economy affected by the global pandemic COVID-19 is – tourism sector” [3]. Cvitlychna V.Yu., Tonkoshkur M.V. and Kravtsova S.V. review the question of management of tourism business after COVID-19 and how the tourism industry is transformed after the COVID-19 pandemic [4, pp. 213–217]. Dow R., president of the American Travel Association and tourism researcher, notes that many areas of activity in tourism will collapse with the economic crisis. First and foremost, it's all about online booking. At the present time a lot of companies are losing money. Companies that provides tourist transport by sea is predicted to suffer because of the impact of coronavirus [5]. Today, due to the processes of globalization, increased competition and heightened consumer requirements for the services provided, as well as other competitive obstacles, the tourist enterprises are forced to seek the new ways to gain and maintain the competitive advantages [6, p. 1372].

The analysis of the scientific literature's experiential materials and concepts has allowed a comprehensive assessment of the problems of tourism business development and concluded that there is a lack of applied research on the development of effective measures to overcome the crisis caused by COVID-19, and therefore this issue requires in-depth research.

The purpose of article is to analyze situation in the tourism industry market and to examine a crisis phenomena caused by COVID-19.

Given the purpose of the study, its objectives are to develop practical proposals to overcome the crisis and reduce the level of negative impact of the pandemic on the economy of the tourism industry.

Results and discussion. Influencing key sectors of the economy, tourism is increasingly becoming one

of the most important indicators of socio-economic development, both of individual regions and the country as a whole. But due to the spread of the coronavirus, the tourism industry is facing a crisis that could be the worst in the history of the world economy. Tourism produced around a tenth part of the growth in the global economy. In recent years, the industry has even been called its global driver because it has grown much faster than the world economy as a whole. After the economy recovered from the 2007–2008 financial crisis, the tourism business grew. In recent years, it has even been singled out as a driver of overall economic growth. According to the WTTC, the tourism industry, as of 2018, has created 300 million of workplaces [1]. For 2020, the forecasts were optimistic. But within two months they have turned sharply negative. Travel demand in 2020 is expected to fall by 5% in North America, 10% in Europe and 25% in the rest of the world [2]. Due to the coronavirus pandemic, the global tourism sector could reduce turnover by 25% in 2020 – it is the equivalent of lack of the travelling or any activity for three months. Such a decline in the tourism industry could lead to a 12–14% reduction in the number of workplaces [7].

The latest report released by the WTTC notes that the global tourism sector could shrink by a quarter this year. The tourism industry could lose up to \$820 billion on cancelled business trips, conferences and exhibitions. Half of those losses could come from China. More and more companies are limiting or cancelling all employee travel. According to surveys, one in four companies have canceled all travel to China, Hong Kong, Taiwan and other Asia-Pacific region countries. Every second company canceled all or nearly all travel to Europe. In total, 43% of WTTC member companies have cancelled business trips. Each trip cancellation, whether for vacation or work, means not only losses for airlines and hotels, but also for the many other businesses that receive money from those who travel [8]. Two of the most notable crisis waves in China's tourism sector are worth noting: the sharp decline of Chinese tourists and travels generally in Europe. According to various estimates, Chinese tourists spent between US \$130 billion and US \$ 227 billion outside their country in 2018. As for 2019 year, expenditure figures data are not yet available. But what is known is that Chinese people were abroad 166 million of times last year. If they don't set out just in the first quarter of this year, it can be assumed that the losses will be calculated in the tens of billions of dollars. During the Lunar New Year 2020 celebrations, the Chinese made 73% fewer trips than in 2019. The number of air passengers from China fell by 84.5% just in February month alone.

In 25 years, Thailand has experienced both a massive economic crisis (1997) and a tsunami

(2004), as well as coups and protests (2006, 2008, 2010, 2014). But tourism statistics in this country have been positive in recent decades. The industry has grown so rapidly that the state has even been nicknamed “Teflon Thailand”. While about 80,000 foreign tourists visited the country in 1960, the number reached 39 million in 2019. Moreover, in 2019, Thailand's tourism industry brought \$ 60 billion – a fifth part of the country's national income. Tourists from China accounted for a quarter of the total number of tourists [8]. The tourism industry in Europe has lost about €1 billion in a month. The EU expects tourism to be among the businesses most affected by the coronavirus. The EU is now launching a joint mechanism to monitor the impact of the coronavirus on the economy. The biggest losses are likely to be in Italy, where a significant percentage of the elderly population is identified as a factor in the rapid spread of the disease. However, Italy's losses will be considerable not only because it has become the epicentre of the spread of the disease in Europe, but also because tourism is a significant part of the country's economy – about 13%. Now, according to public authorities, cancellations of hotel bookings in some regions are as high as 90%. According to the Italian Association for Responsible Tourism (AITR) hotel booking cancellations have cost the Italian hotel industry at least € 200 million as of March due to the spread of the coronavirus [9]. According to preliminary estimates, Italy's losses from the coronavirus could exceed \$ 8 billion. By the time of the coronavirus outbreak, Italy had the highest number of air routes to China among European countries.

Although so far North America and the United States in particular have not been as affected by the spread of the coronavirus as Europe, estimates of losses to the tourism industry there are also impressive. By the Tourism Economics assessments the deprival to the country's travel and tourism industry could be as much as \$ 24 billion [10]. Domestic travel expenditures are expected to fall by 40% (from \$ 972 billion in 2019 to \$ 583 billion in 2020) and international expenditures are expected to decrease by 75% (from \$ 155 to \$ 39 billion) [11].

An analysis of the tourism industry now shows that the US tourism industry is depressed, with total unemployment in the tourism industry standing at 51%. Since the beginning of March the COVID-19 pandemic has resulted in cumulative losses to the US economy of over \$ 237 billion. Constant low levels of travelling expenditure have caused a \$ 301 billion loss in federal, state and local tax revenues since 1 March [9]. According to an Oxford Economics analysis, the U.S. economy is projected to lose 8 million jobs by the end of June. The losses of the tourism industry will lead to a decrease in GDP of \$ 1,2 trillion in 2020. Reduced travel in 2020 will lead to a loss of \$ 80 billion in taxes [12].

The global airline industry, in our opinion, will be among the hardest hit by the coronavirus. First, most airlines stopped or reduced flights to China. Then the aviation business in Europe was hit. The International Air Transport Association (IATA) has recently estimated that the industry's losses could be as much as \$ 113 billion. Overall, IATA estimates that international aviation business could decline by 19% [13]. Shares of the world's largest airline such as American Airlines have fallen 32% since the beginning of the year, while Germany's Lufthansa has fallen by 29%. Since the beginning of March alone, Lufthansa has canceled 7,100 flights in Europe, mostly from Germany to Italy. About 150 of the airline's 770 aircraft remain on the ground.

The European Airports Association (ACIE) has already indicated that from January to March 2020 passenger numbers have decreased by 14%. Some airlines continued flights even with a few passengers on board in order to retain temporary slots at major airports. Such flights have even become known as “ghost flights”. This is related to EU regulations, the so-called “take it or leave it” rule, where a company loses slots if it does not operate a flight [14].

By the beginning of the COVID-19 pandemic, the global cruise business was booming – both, bookings and travel costs were rising. But as Covid-19 began to spread, bookings plummeted by 60%, according to Nomura Securities. After a cruise liner Diamond Princess, where almost 3,700 passengers were quarantined, over half a thousand of whom were infected and four died, was called a 'petri dish' for the virus to spread and shares of cruise companies began to plummet. Particularly, shares in Carnival Corporation, which owns Diamond Princess, as well as other leading cruise companies – Norwegian, Royal Caribbean – have fallen 60–70% since January 2020. Subsequently, cruise liners began to be denied berths at ports. Royal Caribbean cancelled 18 voyages to Asia, costing the company \$ 130 m. Norwegian, which cancelled 40 voyages to Asia, said it would not offer cruises to the region until the end of 2020, while the cancelled voyages cost the company \$ 16 m. Carnival estimates its losses at around \$ 440 m. The sad history of the industry can be illustrated by the case of the Majestic Princess, which was commissioned by Carnival Corp. specifically for Chinese tourists. The ship has 19 decks, 1,780 cabins and over 1,000 square metres of luxury boutiques. However, the liner is now docked in Singapore and all its future 13 voyages are cancelled [8].

The World Tourism Organization (UNWTO) predicts that in 2022 the number of international tourists due to the coronavirus pandemic will be 20–30% lower than in 2019. The expected 20–30% drop could result in a \$ 300–450 billion drop in international tourism revenues, almost a third of the \$ 1.5 trillion generated in 2019. Given past market trends, this would mean

a loss of 5 to 7 years of growth. However, it should be noted that international tourist flows fell by 4% in 2009 amid the global economic crisis, while the 2003 outbreak of SARS-CoV-2 resulted in a decline of only 0.4% [15]. At the same time, the UN WTO emphasizes tourism's historic resilience and ability to create jobs after crisis situations, and stresses the importance of international cooperation and ensuring that the sector is a central part of the recovery effort.

The Ukrainian tourism industry has already lost about 1.5 billion dollars. If the quarantine is extended, most tourism businesses will not be able to survive it. However, so far the Cabinet of Ministers has not explained when and under which rules Ukrainian hotels can start operating. Now the Ukrainian Hospitality Association has summarized the rules of operation for hotels and health resorts that have been approved by governments of other countries and proposed them to the Cabinet of Ministers. Although Ukraine's economy is not as tied to inbound tourism, if the quarantine will be overextended, losses for the industry will be at the level of \$ 3–5 billion. Approximately 80% of hospitality institutions are small businesses, private entrepreneurs, which may not survive this quarantine. Speaking about inbound tourism, it should be noted that the pre-quarantine level of inbound tourism was not too high, because there was a huge drop after 2014. If the external borders are closed longer than the domestic quarantine is lifted, there will be an increase in domestic tourism, which can partially cover the external flow. With this flow, growth is also predicted [3].

Worldwide Community of Hospitality and experts of the All-Ukrainian Association of Employers' Organizations "All-Ukrainian Federation of Employers in the Field of Tourism of Ukraine" suggest the following measures to mitigate the consequences of the crisis:

- financing from special funds of the State Budget of Ukraine expenditures on payroll, including deductions, utility payments and other expenses related to the use and maintenance of tourism businesses;
- increasing expenditures from the state budget for tourism development;
- to grant the status of medical institutions to accommodation facilities and to provide enterprises at the state's expense with a sufficient number of tests, personal antiviral and bactericidal protection means;
- provide, at state expense, mass qualification trainings for staff in the field of tourism with sanitary and epidemic control requirements;
- provide a 7% Value Added Tax rate to all establishments that provide medical services;
- 0% Value Added Tax on fees for pensioners who use hotels providing medical services;
- exempt businesses from Value Added Tax on importation of anti-Coronavirus equipment and

components for new and upgrading of existing infrastructure, with a two-year prohibition on disposal of such goods after customs clearance. Provide the right to accelerated depreciation of the cost of such equipment as part of income tax expenses;

- provide a tax incentive (Unified social Tax) for all those who travel to Ukraine and for users of sanatorium and spa services;
- temporarily introduce tax holidays (Single social contribution and Single tax) for companies that retain employees and pay salaries on time;
- 0% Unified social Tax for sole proprietorships in tourism and hospitality;
- National Bank of Ukraine to support a temporary suspension of payments on loan contracts where tourism entities are debtors;
- reduce the base discount rate and the cost of mortgages;
- private banks to restructure repayment of liabilities, provide preferential lending for tourism development;
- to the Chamber of Commerce and Industry of Ukraine to officially recognize at the state level and document the existence of force majeure in Ukraine;
- The State Agency for Tourism Development of Ukraine to develop, with the participation of experts, and approve at the national level a list of recommendations and instructions on sanitary measures and the use of antivirals for the tourism industry, particularly for accommodation, public catering, transport and infrastructure, public and commercial establishments, residences, etc. To develop technological charts for the behaviour of tourists and workers in crisis situations [16; 17].

Failure to implement these measures could lead to the imminent dismissal of more than one million workers without actual severance pay due to lack of working capital, as well as the possible bankruptcy of thousands of tourism entities and hundreds of thousands of related companies and suppliers in to the tourism industry. In our opinion, such measures would be adequate to the current situation and will contribute to the development of the Ukrainian tourism industry. At the same time, in addition to the above-mentioned measures, we propose to introduce: firstly – mandatory state medical insurance against COVID-19 infection for citizens forming inbound and outbound tourist flow; and secondly - modernization of tourist infrastructure and improvement of means of communication (provide 4G and 5G coverage throughout the country) and digitalization of tourist and recreational institutions.

Conclusion. Today, the COVID-19 pandemic crisis has forced the tourism business to step out of its comfort zone and look for innovative ways of development and activity. In our opinion, in order for tourism to recover from the crisis, it should be resuscitated by introducing all kinds of

innovations. There are many ways to do it. But the main ones should be -state support of tourism and entrepreneurial initiatives in this sphere, improvement of service, in particular in the sphere of hospitality, and strengthening of information campaign, particularly in the Internet.

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