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The Current Global Tourism Market Crisis and Overcoming Opportunities

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ABSTRACT

The article deals with the current world tourism market crisis and the opportunities to overcome it. The relevance of the topic and the significance of the study are due to tourism being among the sustainable economic development and social stability factors in any region of the world. This industry has suffered from the pandemic compared to any other one(s). The purpose of the study is to identify trends and patterns of the current international tourism market crisis and to analyze problems and opportunities to solve these. The scientific literature analysis on the modern international tourism market crisis issue has demonstrated that researchers agree on the global significance of the tourism business entities' current losses. At the same time, scientists consider it impossible to reliably predict COVID's final impact on the international tourism industry. The article presents an analysis of the dynamics of the development of the international tourism market over the past ten years and a generalization of the consequences inflicted on the tourism economy in the 2020 crisis year and the first half of 2021. The international organizations-based statistical analysis data made it possible to substantiate the current tourism development directions in the context of the negative factors' influence associated with the spread of new coronavirus infection. On the basis of a survey of the tourists, the travel companies' possibilities to improve their development strategies and to use competitive advantages in new conditions are concretized. The 5P marketing model is, therefore, recommended.

KEYWORDS: economy, tourism, international travel, COVID-19, pandemic, crisis

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Әлемдік туристік нарықтың қазіргі дағдарысы және шығу мүмкіндігі

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ТҮЙІН

Мақала әлемдік туристік нарықтың қазіргі дағдарысы тақырыбына және одан шығу мүмкіндіктеріне арналған. Тақырыптың өзектілігі мен зерттеудің маңыздылығы туризм әлемнің кез-келген аймағында экономиканың тұрақты дамуы мен әлеуметтік тұрақтылықтың факторларының бірі болып табылатындығына байланысты және бұл пандемия басқаларға қарағанда көбірек зардап шеккен сала. Зерттеудің мақсаты - халықаралық туристік нарықтың қазіргі дағдарыстық жағдайының тенденциялары мен заңдылықтарын анықтау, проблемалар мен оларды шешу мүмкіндіктерін талдау болып табылады. Қазіргі халықаралық туристік нарықтың дағдарысы туралы ғылыми әдебиеттерге жасалған талдау, зерттеушілердің туристік бизнес субъектілерінің ағымдағы шығындарының жаһандық маңызы туралы келісетіндігін көрсетті. Сонымен бірге ғалымдар COVID-тің халықаралық туризм индустриясына түпкілікті әсерін сенімді түрде болжау мүмкін емес деп санайды. Мақалада соңғы он жылдағы халықаралық туристік нарықтың даму динамикасын талдау және туризм экономикасына 2020 дағдарыс жылы мен 2021 жылдың бірінші жартысында келтірілген салдарларды жалпылау келтірілген. Зерттеу нәтижелері тұрбиизнес субъектілеріне пайдалы болады және Қазақстанның туристік саласын қайта құрылымдау тұжырымдамасының негізіне алынуы мүмкін. Халықаралық ұйымдардың деректерін статистикалық талдау жаңа коронавирустық инфекцияның таралуына байланысты теріс факторлардың әсері жағдайында туризмді дамытудың өзекті бағыттарын негіздеуге мүмкіндік берді. Туристердің сауалнамасы негізінде туристік компаниялардың даму стратегиясын жетілдіру, жаңа жағдайларда бәсекелестік артықшылықтарды пайдалану мүмкіндіктері нақтыланды. 5P маркетингтік моделін қолдану ұсынылады.

ТҮЙІН СӨЗДЕР: экономика, туризм, халықаралық сапарлар, COVID-19, пандемия, дағдарыс

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Современный кризис мирового туристического рынка и возможности выхода

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АННОТАЦИЯ

Статья посвящена теме современного кризиса мирового туристического рынка и возможностям выхода из него. Актуальность темы и значимость исследования обусловлены тем, что туризм является одним из факторов устойчивого развития экономики и социальной стабильности в любом регионе мира, и именно эта отрасль больше других пострадала в результате пандемии. Цель исследования заключается в выявлении тенденций и закономерностей современного кризисного состояния международного туристического рынка, анализе проблем и возможностей их решения. Проведенный анализ научной литературы по вопросу кризиса современного международного туристического рынка показал, что исследователи сходятся во мнении о глобальном значении текущих потерь субъектов турбизнеса. При этом достоверно спрогнозировать окончательное влияние COVID на индустрию международного туризма ученые считают невозможным. В статье представлен анализ динамики развития международного туристического рынка за последние десять лет и обобщение последствий, нанесенных экономике туризма в 2020 кризисном году и первой половине 2021 года. Результаты исследования будут полезны субъектам турбизнеса и могут быть положены в основу концепции реструктуризации туристической отрасли Казахстана. Статистический анализ данных международных организаций позволил обосновать актуальные направления развития туризма в условиях влияния негативных факторов, связанных с распространением новой коронавирусной инфекции. На основе опроса туристов конкретизированы возможности туркомпаний по совершенствованию стратегии своего развития, использования конкурентных преимуществ в новых условиях. Рекомендовано применение маркетинговой модели 5P.

КЛЮЧЕВЫЕ СЛОВА: экономика, туризм, международные поездки, COVID-19, пандемия, кризис

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Introduction

Tourism is significant for the world economy since this industry is a favorable environment for small and medium-sized businesses. Moreover, it is promising for attracting foreign investment on a large scale and quickly. Besides, the tourism business stimulates the development of other economic sectors, including construction, trade, transport, agriculture, communications, etc.

The epidemiological situation in 2020 produced a negative impact on international tourism. The travel industry has become one of the industries hardest hit by the COVID-19 pandemic. All the service providers involved in the tourism sector suffered losses due to the current situation: travel operators and agencies, hotels, sanatoriums, rest homes and boarding houses, tour guides, organizations providing recreational services, transport and passenger transportation, and so on. Countless tourist destinations have now ceased to function. The tourism industry is currently in a highly unfavorable situation.

According to WHO, as of January 1, 2020, the number of COVID-19 cases worldwide was about 86.4 million, and the number of deaths was 1.8 million (WHO. Coronavirus (COVID-19). Dashboard. Access mode: <https://covid19.who.int/info>). The resulting unprecedented global travel restrictions have caused some of the worst disruptions in the global economy. Within a few months, the international tourist system structure moved from “super tourism” to an almost complete stop. In such force majeure circumstances, tourists could not reimburse their expenses for pre-purchased travel services, having received only warranty certificates from tour operators with an indefinite period of obligations’ fulfilment.

The relevance of the topic and the significance of the study are due to tourism being among the sustainable economic development and social stability factors in any region of the world. This industry has suffered from the pandemic compared to any other one(s).

The study aims to identify trends and patterns of the current international tourism market crisis and to analyze problems and opportunities to solve these.

Millions of jobs in the global tourism sector were lost due to flight cancellations, hotel reservations, and events. Thus, all subjects of the tourism market have suffered. In this regard, studying the current world tourism market crisis and designing ways out of it is relevant and paramount.

Literature Review

It is still being determined when the international borders will fully function, and the transport communication within the countries will start working to the fullest extent. Therefore, the entire service sector suffered huge losses, and many companies faced bankruptcy risk. Scientists are unanimous (Yeh, 2021) that the tourism sector has undergone the most negative modifications in connection with the current situation.

Thus, Kuščer and a group of researchers noted that in 2019 the number of international arrivals exceeded 1.5 billion: the long evolution of tourism largely depended on the decades of development that had passed since the global financial crisis. Nonetheless, this latest period of unhindered expansion of the tourism industry ended with the onset of the pandemic (Kuščer et al., 2021). Other scientists, Motevalli-Taher and Payda, emphasize that the tourism industry had also been undermined by government measures to contain and combat the pandemic. Borders were closed, travel was prohibited, social and business events were cancelled, and people were encouraged to stay home. In taking these measures, governments worldwide have sought to find a balance between protecting the health and maintaining their economies, preventing dangerous levels of unemployment and bankruptcy (Motevalli-Taher & Paydar, 2021).

Many economists highlighted pricing as a particular problem in the current crisis (Sharma & Sha, 2020; Reis & Pinho, 2021; Bogan, 2021). As many travel operators suffered substantial financial losses in 2020, tax-burdened hospitality and transport companies were forced to compensate for the volatility of the currency. Traffic congestion and hotel occupancy restrictions also affected the tourist products’ cost. Analysis of consumer behavior research (exhibits that the demand for tourism services has become more selectively customized (Li & Song, 2021; Joo et al., 2021; Rudyanto et al., 2021). As a result, the recovery processes would be dynamic after the restrictions are lifted.

By the end of 2020, according to some researchers’ estimates, the tourism sector had begun to recover gradually, mainly in the northern hemisphere regions (Shahzad et al., 2021; Aldao et al., 2021; Roy, 2021). At the same time, travel restrictions had remained in place for most destinations worldwide and business travel, which had been hit hardest.

At the moment, no expert could reliably predict the final impact of COVID on the international tourism industry. Most researchers agreed that the pandemic positively affecting the development of domestic tourism, which could be used by affected travel companies (Robina-Ramirez et al., 2021; Anguera-Torrell et al., 2021; Motevalli-Taher & Paydar, 2021). However, for travel companies specializing in the field of international tourism, such a re-profiling is comparable to running a new business since the situation in the domestic tourism market is entirely different. In addition, practical research (Volgger et al., 2021; Ryakhovsky et al., 2021; Woyo, 2021) showed that domestic tourism during the pandemic is developing slowly due to domestic restrictions. Thus, the study aims to identify trends and patterns of the current international tourism market crisis and to analyze problems and opportunities to solve these.

Methodology

The study uses general scientific methods: analysis, synthesis, comparison, analysis of statistical data, and multiplicative analysis to assess the profitability of the tourism industry

and the production costs' impact on the competitiveness of travel companies. Graphical presentation of summarized data for 2010–2020 made it possible to reflect on the dynamics of the tourism industry development, its contribution to GDP and the crisis changed in 2020.

The study is based on official information by international organizations: the World Bank (WB), the World Tourism Organization (UNWTO), the World Tourism and Travel Council (WTTC), the United Nations (UN), the World Health Organization (WHO), the International Labor Organization (ILO), the International Air Transport Association (IATA).

Case Studies

Modern tourism is defined as a phenomenon of the twentieth century, and the twenty-first century has had every chance of becoming a century of tourism. More than 150 countries out of 195 countries were involved in tourism. Over the past decade, global tourism has shown strong growth. Tourism is important in developing the world economy, occupying a relatively large share of world GDP. This is confirmed by data on tourism's total contribution to world GDP for the last period (Figure 1).

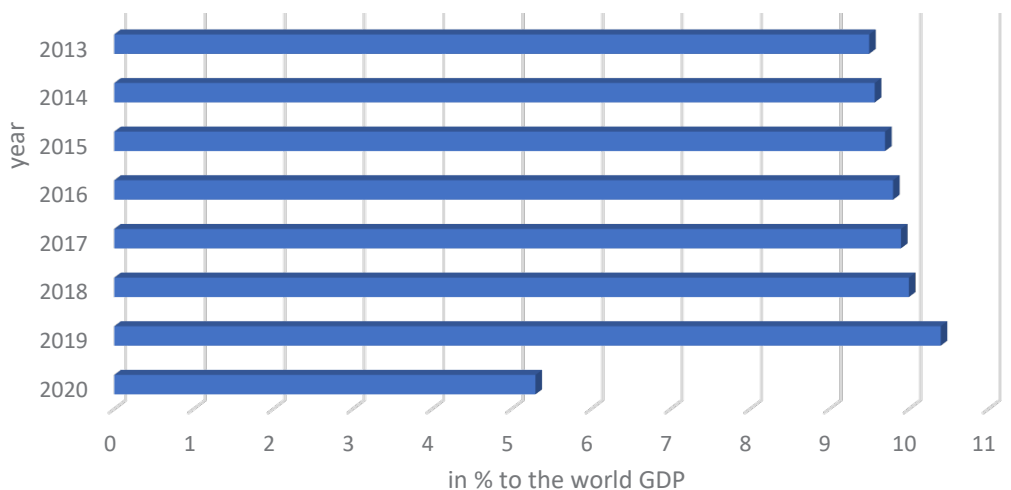


Figure 1 - International tourism contribution to the world economy for 2010-2020

Note: Compiled based on data from World Bank (2021)

Based on the data in Figure 1, we can conclude that the total contribution of world tourism to world GDP has been growing steadily. It is clearly seen that in 2020 it was replaced by a significant - two-fold - drop in income from tourism. International, regional and local travel

restrictions immediately affected various travel industry segments, such as air transport, cruises, public transport, accommodation facilities, cafes and restaurants, festivals, etc. Due to the tourism sector problems, the UN's unfavorable forecast came true - a decline in global GDP by 4.3% (UNCTAD, 2021).

The UN crisis forecast assumed a reduction in foreign tourists by the end of 2020 by 20-30% compared to 2019, but in fact, this value reached 72%. Such a rapid drop is due to restrictive measures on travel abroad, as well as quarantine measures on the territory of the states themselves.

In the past, global tourism has been affected by several crises. Serious, devastating events from 2001 to 2015 include the September 11 terrorist attacks (2001), the severe acute respiratory syndrome outbreak (2003), the global economic crisis (2008-2009), and the Middle East respiratory syndrome (2015). None of them led to a significant decrease in the global

development of tourism, we note only SARS (-0.4%) and the global economic crisis (-4.0%). This suggests that tourism as a system is relatively resilient to external shocks.

International air travel suffered the most. According to the International Air Transport Association, in 2020, the net loss was equal to \$126.4 billion. Total revenue fell by 69%. Against this background, a wave of redundancies arose — 4.8 million aviation industry employees lost their jobs or were sent on leave for an indefinite period without pay.

Figure 2 shows the industry downturn in some countries most affected by the pandemic.

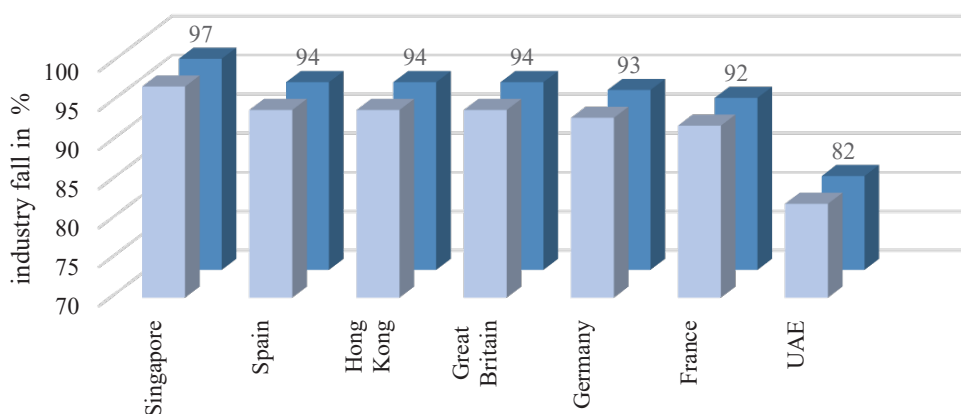


Figure 2 - Aviation industry decline by country in 2020

Note: Compiled based on data from IATA (2021)

Speaking about individual countries, the crisis impacted the tourism industry and the economy of each of them, led to irreversible losses. For small states, especially island states, whose economies were directly dependent on tourism, the tourism sector's total contribution to GDP reached 50% or more. According to the World Travel and Tourism Council, in 2019 the total contribution to the GDP of Macau was 91.3%, Maldives - 56.6%, and Bahamas - 43.3%. At the same time, in 2020, the number of international tourists in small island developing states decreased by 54.4%, and the economy of small island developing states - by 4.7%, compared with 3% in the global economy (Tourism. Pandemic. Countries of the world. World Travel & Tourism Council, 2021).

The world tourist flow until 2020 showed continuous growth. However, already in 2019-

2018 compared with 2017-2018, the growth decreased to 3.8%, which was explained by the trade tensions between the United States and the DPRK, and a decrease in economic growth worldwide.

The decline in international arrivals in 2020 resulted in a loss of 900 million international arrivals compared to 2019 and \$935 billion in international tourism export earnings. It exceeded the loss in 2009 more than ten times due to the global economic crisis. The most significant decline in international tourist arrivals was observed in Spain (10.8 million), Thailand (7.3 million), and Turkey (4.4 million).

The global and market losses due to the pandemic are enormous. However, it is extremely difficult to assess them now due to the sufficient statistical data lack and some companies, industries and governments' reluctance to disclose the economic downturn level.

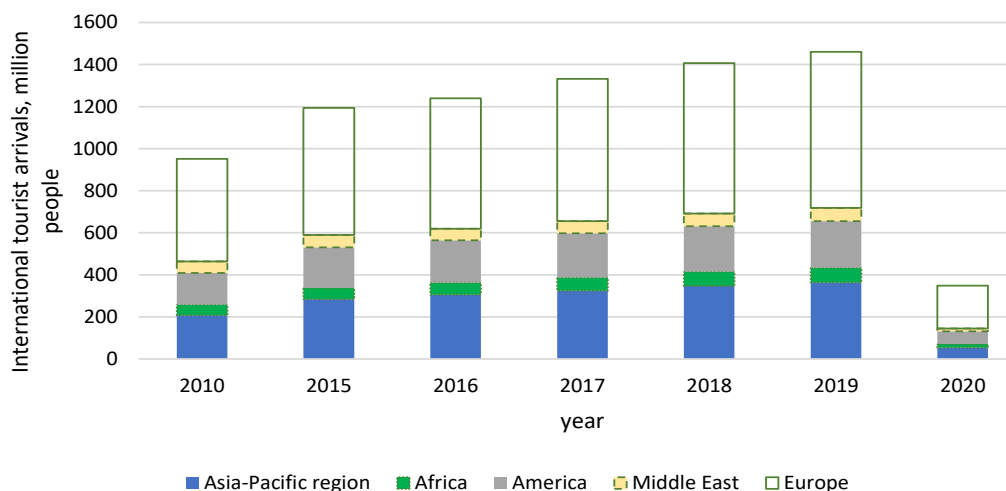


Figure 3 - Dynamics of international tourist arrivals for 2010-2020

Note: Compiled based on data from WTTC (2021)

Nevertheless, there is ample evidence that the impact and recovery from the COVID-19 pandemic will be unprecedented. For comparison: in October 2020, 98 million people (-83%) travelled around the world less than in the same period in 2019. The Asia-Pacific region was the first to suffer from the pandemic, the tourist flow to Asia decreased by 82%, Europe and America ranked second — by 68%, African countries and the Middle East lost 69% and 73% of arrivals (Figure 4).

This significant decline in tourist flows resulted in massive job losses and a sharp decline in foreign exchange earnings and taxes, which limited the state’s ability to support the tourism

industry. The countries being most at risk are those where tourism is the primary source of income. Unlike other business sectors, tourism revenues are irretrievably lost because the unsold capacity (such as in the accommodation area) cannot be realized in subsequent years. As a result, it produces corresponding consequences for employment in this sector.

Until 2020, there was a trend towards an increase in employment in tourism and related industries. In 2019, tourism and related sectors accounted for 330 million jobs globally, equivalent to 10.3% of the world’s total employment. In 2019, the tourism sector generated more than 9 million new jobs, the highest in all years of sustained growth, and 2020, the pandemic resulted in a 22% decline in employment (Figure 5).

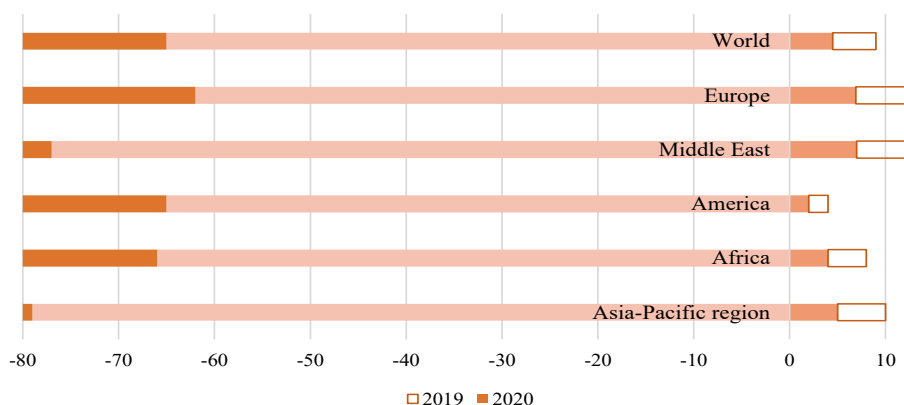


Figure 4 - Growth dynamics in tourists number for 2019 and 2020, in %

Note: Compiled based on data from WTTC (2021)

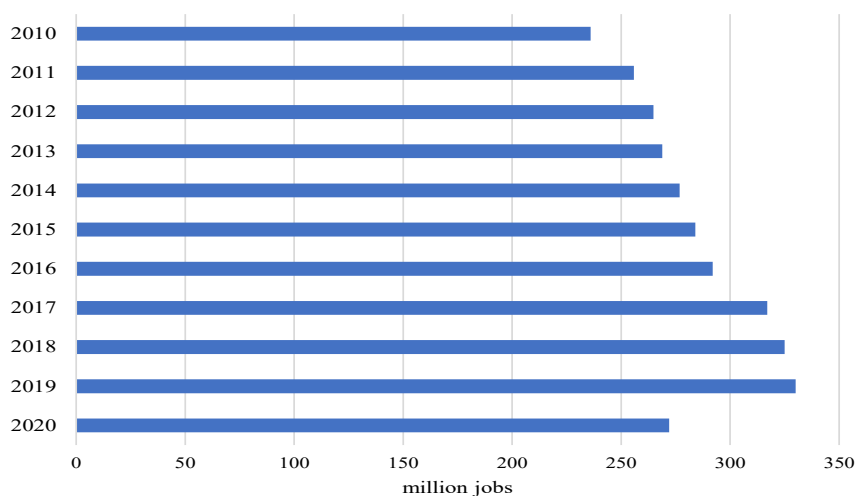


Figure 5 - Dynamics of employment in tourism in the world for 2010-2020

Note: Compiled based on source (Discenza, 2021)

One of the consequences of the decrease in tourist flow in 2020 was a significant increase in unemployment. According to ILO, 120 million professionals in tourism and related industries lost their jobs in the first year of the pandemic. The

job loss in the tourism industry has particularly affected women: by trends 2010-2019, they were in the majority of the number of people employed in world tourism, and in 2020 this figure dropped to less than 50% (Figure 6).

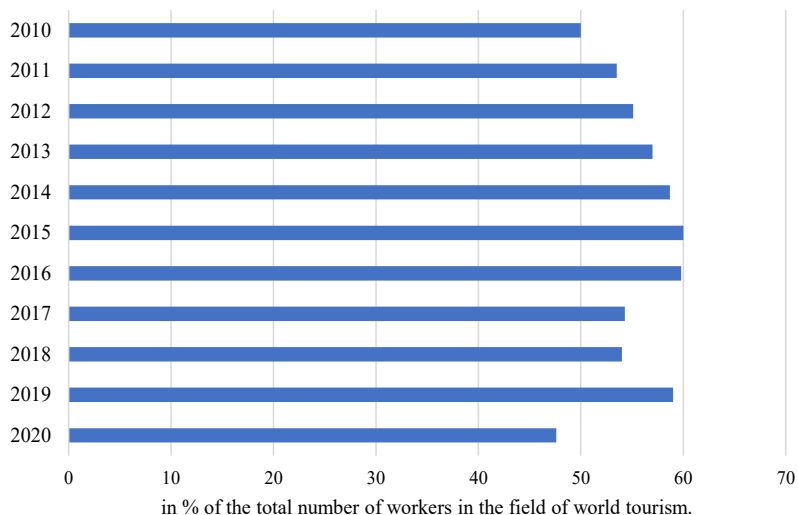


Figure 6 - Dynamics of employment of women in tourism in the world for 2010-2020

Note: Compiled by the author based on the UN Women (2021)

As a rule, they run small travel companies and have much fewer financial resources to deal with the crisis. In addition, women often hold such positions in the tourism industry as maids or receptionists, which puts their health at particular

risk. While the recovery in international tourism has remained slow, only 115 countries (53% of all destinations worldwide) have lifted travel restrictions.

Perspectives

The COVID-19 situation is still relevant, and there is no definite answer to the question of how tourism will develop in the future. Our survey of 35 tour operators showed that, in their opinion, it would take up to 4 years to return to the 2019 level in terms of the number of trips, even after lifting all countries' restrictions on entry and exit.

Based on pre-pandemic data, our calculations show that the tourism industry's long-term profitability can be potentially stable and unaffected by investment in a post-pandemic environment. The return on investment will decline with the introduction a new travel service. Notwithstanding, competitiveness has nothing to do with profit margins and is likely to grow. The results are expected to help guide marketing decisions.

Sales of tourism services may grow by 61.6% in 2022-2023. The calculations confirm that when travel companies spent 89% of their net profit in the pre-pandemic environment, the volume of travel services could not be sustained, and gross value added would fall to 3%. Therefore, to ensure better performance and a more comprehensive range of travel services, the minimum rate of return under ideal conditions should be at least 12.9%, and the value-added tax should not exceed 38.9%.

As the travel industry will recover later than any other one, businesses will be outsiders in the market for a while. In this regard, it is essential to prioritize the development of business tourism, as these trips will be necessary for a recovering economy.

The 5P marketing model (product - price - place - promotion - consumer) can be proposed to optimise the tourism industry activities in the post-pandemic market. The expanded 5P marketing model can serve as the basis of choice for travel business owners, providing a competitive advantage over existing travel market participants. It allows the evaluation of travel services in different market segments through an in-depth analysis of profitability and demand.

Following this marketing model, meetings and events at hotels will generate additional revenue for stakeholders and corporate business travel agencies and improve travel companies' image. Using this model can also improve the quality of tourism services. Typically, large hotel corporations associate themselves with image, not location.

At the level of the business environment, the leadership of the travel industry must ensure the financial indicators' transparency, high-quality management and stimulation assigned to the innovation process, and the reasonableness of optimizing activities in times of crisis. The sustainable competitive advantages of travel companies are based on innovation, quality control service, flexible, adaptive and effective organizational culture, intangible assets (image and business reputation), and consumer behavior management. Consequently, the competitiveness strategy should be more focused on these variables.

In current conditions, the most promising strategies for increasing competitiveness are strategies aimed at ensuring consumer loyalty, eco-innovation and adaptation to the external environment.

The pandemic has affected travellers, as well. Our survey of 185 tourists from different countries showed that it is essential to base the strategy of travel companies on the focus on replacing group tours with individual routes to less busy tourist places.

When choosing accommodation facilities, greater preference (68%) is mainly given to economical options, for example, apartments or apart-hotels, small hotels, glamping and caravanning are gaining popularity.

Tourist trips are expected to become less intense and rarer but also longer. Planning a trip for a 'new' tourist is in the range of 3–14 days before departure. Tourists are more interested in off-season trips (52%) and unusual tourist routes (89%).

A new tourist is more focused on alternative forms such as ecotourism, agritourism, rural tourism, etc. These forms of tourism will focus more on nature and society.

One of the trends in the development of tourism will be the integration of new technologies into the service industry: virtual and augmented reality, the economy of impressions, e-commerce, contactless technologies and other innovations. Overall, tourism will become more sustainable and innovative.

Conclusions

Summing up, the COVID-19 pandemic has caused significant damage to the tourism industry around the world. However, given its scale, there is an urgent need not to return to business as usual after the end of the crisis but to carry out a tourism system's global transformation. The pandemic should be viewed as an opportunity to rethink the tourism market's trajectory critically.

Travel restrictions remain in place in many countries, and consumer confidence is at an all-time low, despite a growing number of territories taking various measures, including imposed safety and health protocols, targeted marketing and advocacy campaigns, tourism recovery plans, practices to stimulate domestic tourism, etc.

The analysis of the international tourism market development dynamics demonstrated its connection with modern trends since the tourism industry is an integral part of the world economy. It was reflected in the decrease in tourist flows and the pandemic's negative impact on employment and income from tourism activities. It is important to note that the crisis has changed a tourist themselves as a consumer. Therefore travel companies should change their strategy, for which it is recommended to use the 5P model.

The pace of vaccination roll-out will drive the recovery in international tourism in 2022 in different countries and regions, coordination between countries regarding travel procedures and the general economic situation in the world. Carrying out mass vaccination of the population against coronavirus will provide an opportunity for further interaction between countries. The tourist market will begin to recover since travel is integral to people's lives.

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