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# Analysis of the impact of the COVID-19 pandemic on the development of the international tourism market

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Abstract: The COVID-19 pandemic has dealt a significant blow to the international tourism market, resulting in job losses, reduced incomes, and rising unemployment. Therefore, studying the impact of the pandemic on the development of the international tourism market is relevant and important. This article focuses on analyzing the impact of the COVID-19 pandemic on the international tourism industry in the context of globalization. It highlights key aspects and trends that emerged during the crisis period and influenced the development of the tourism market. The authors specifically concentrate on the pandemic's effects on the global travel network, encompassing changes in demand, restrictions on international travel, and the industry's adaptation to new global challenges. The COVID-19 pandemic has been identified as the cause of the most significant drop in international tourism in human history. It led to a sharp decline in the number of international tourist arrivals, export earnings from tourism, and the economic contribution of tourism to the world economy. The impact of the pandemic on international tourism varied across regions, with the Asia-Pacific region being the most affected, experiencing an 84% decrease in international tourist arrivals. The authors pinpoint the main challenges facing the industry after the pandemic, such as changes in demand, restrictions on international travel, and the reorganization of tourism services and infrastructure. The study also explores possibilities for recovery and adaptation of the tourism industry to new realities post-pandemic, with particular attention given to strategies and innovations that can restore interest in international travel and enhance the competitiveness of countries in the global tourism market. It was found that the recovery of international tourism is progressing slowly. In 2022, international tourist arrivals were still 34% lower than in 2019. The study determined that the development of tourism in the post-pandemic period will be influenced by trend changes such as the prioritization of health and safety, shifts in consumer behavior, a desire for unique emotional experiences, new forms of employment, digital transformation, and the emphasis on ecotourism. Taking these trends into account will contribute to the recovery of the tourism industry and ensure its sustainable development in the future.

**Keywords:** international tourism, tourism market, globalization, COVID-19 pandemic, tourism infrastructure, tourism services, international arrivals, arrivals, recovery, development trends.

## **1. Introduction**

Over the past decade, the tourism industry has undergone several significant changes, emerging as one of the largest and fastest-growing sectors of the world economy. Despite occasional unfavorable periods experienced by global economies, tourism has displayed a unique ability to recover swiftly.

Today, the international tourism market stands as one of the world economy's largest sectors, generating \$1.5 trillion in revenue and employing 323 million people in 2019. However, the COVID-19 pandemic dealt a severe blow to international tourism, resulting in a sharp decline in tourist arrivals and revenues. In 2020, the world economic system underwent unprecedented changes, with border closures, artificial restrictions on the movement of tourists even within a single country, significantly impacting the hospitality industry [1]. According to the World Tourism Organization, in 2020, the number of international tourists decreased by 73%, totaling 415 million persons, and revenues from international tourism plummeted by 74%, marking the most substantial decline in the history of international tourism.

The post-pandemic period is characterized by considerable uncertainty regarding the future of international tourism. On one hand, there is an expectation for a recovery in travel demand as people seek to compensate for lost opportunities during the pandemic. On the other hand, there are certain risks that may negatively affect the development of the tourism market, including:

- the tourism market's development, including the instability of the global economic situation;

- the potential further spread of COVID-19 and other epidemics;

- changes in tourist behavior influenced by geopolitical factors.

Therefore, the analysis of the development of the international tourism market is an urgent task that allows us to predict the future trends of the industry and develop effective strategies for its recovery.

#### 2. Object and subject of research

The object of the research is the interaction process between the global COVID-19 pandemic and the international tourism market, encompassing its structure, dynamics, trends, and adaptation strategies.

The subject of the study is the impact of the COVID-19 pandemic on the development of the international tourism market.

## 3. Target of research

The purpose of the study is to analyze the impact of the COVID-19 pandemic on the international tourism market, identify the main trends in the industry's development, and justify recommendations for its recovery. To achieve this goal, the following tasks were addressed:

- analyze the impact of the COVID-19 pandemic on the international tourism market and determine its consequences for the tourism business and the economy;

- characterize the main trends in the development of the international tourism market after the COVID-19 pandemic;

- justify recommendations for the restoration of the international tourist market.

## 4. Literature analysis

Within the framework of the study, the scientific literature devoted to the development of international tourism was analyzed. In our opinion, the works of M. Yu. Razinkova [2], O. Kirdan [3], S. Kalinichenko [4], P.O. Podlepina [5], Karga O.O. [6], K.S. Nikitenko [7], Andreas Freytag and Christoph Vietze [8], Batir Mirbabayev [9], Gavin Eccles [10], P. Sedarati, S. Santos,

P. Pintassilgo [11], K.M. Gorb, K.N. Horb, V.V. Volok, N.O. Nebaba, N.A. Nebaba [12], and others, deserve special attention.

As part of the study on the development of international tourism in the conditions of the COVID-19 pandemic, scientific publications of Ukrainian and foreign scientists were considered. In particular, the following works deserve special attention: Z.A. Atamanchuk [13], D. Tyurinoi [14], I.M. Kyryliuk, L.A. Chvertko [15], S.V. Gavdei [16, 17], S.K. Deb, S.M. Nafi [18], A. Dias, M. Patuleia, R. Silva, J. Estêvão, M. González-Rodríguez [19], S. Gössling, N. Schweiggart [20], S. Gössling, D. Scott, C.M. Hall [21], Y. Gu, B.S. Onggo, M.H. Kunc, S. Bayer [22], N.C. Kreiner, Y. Ram [23], J.M. Rogerson [24].

As a result of the literature review, it was found that the COVID-19 pandemic had a significant impact on the international tourism market. In the post-pandemic period, changes in the behavior of consumers of tourist services were observed. Tourists have become more demanding about safety and hygiene, and they also prefer short-term trips. Additionally, there is an increased demand for tourism services aimed at improving health and well-being.

The COVID-19 pandemic has negatively impacted the structure of the supply of tourist services. In the post-pandemic period, there is a reduction in the number of hotels, as well as an increase in demand for private housing. Moreover, there is a reorientation of tourism enterprises to online sales channels.

The COVID-19 pandemic has led to changes in the regulation of international tourism. In the post-pandemic period, many countries have introduced new rules and restrictions aimed at preventing the spread of COVID-19. Overall, the literature review found that there has been a gradual recovery in international tourism in the post-pandemic period, but travel volumes are still lower than before the pandemic.

Despite the significant number of publications, the issues of identifying the main trends in the development of international tourism in the post-pandemic period and substantiating recommendations for restoring its volumes, taking into account the realities of globalization, remain insufficiently studied. This led to the choice of the research topic, formulation of its goal, and tasks.

## 5. Research methods

The methodological aspects of the research involve works by foreign and Ukrainian scientists dedicated to the development of international tourism in the conditions of the pandemic. The article employs the following research methods: analytical method: for studying and summarizing theoretical and practical materials on the problem of international tourism development; historical method: to study foreign experience of the impact of the pandemic on international tourism; deductions: to determine the influence of global trends in the development of society and markets on tourism and hospitality in the near future; abstract-logical method: for formulating conclusions, generalizations, and recommendations; statistical method: for the analysis of quantitative indicators of the functioning of international tourism; comparative analysis method: to compare trends in the development of the international tourism; comparative analysis method: to compare trends in the development of the international tourism; comparative analysis method: to compare trends in the development of the international tourism; comparative analysis method: to compare trends in the development of the international tourism; comparative analysis method: to compare trends in the development of the international tourism; comparative analysis method: for yisualization of research results.

The study is essential for understanding how the COVID-19 pandemic has affected the international tourism market and predicting future development trends. The research results will be beneficial for state authorities, tourism enterprises, as well as potential tourists.

## 6. Research results

In the modern world economy, services occupy a dominant position both within individual countries and in international trade. This fact indicates that the world is at a new stage of economic development, known as post-industrial. In this type of society, the service sector and information

technologies play a key role in the creation of GDP, foreign trade, and, in general, in the development of the economy.

The development of the international services market is one of the manifestations of globalization, covering a significant part of the world economy. Under the influence of globalization processes, the service sector is becoming increasingly important for most countries worldwide [25]. Specifically, tourism:

- increases revenues of state and local budgets.

- creates jobs in various fields, such as the hotel and restaurant business, transport, excursion services, etc.

- promotes the development of other sectors of the economy, such as agriculture, construction, production of consumer goods, etc.

- improves the social infrastructure of tourist centers, including roads, transport, hospitals, etc.

- actively supports folk crafts and culture.

- contributes to the growth of the standard of living of the local population.

- helps to increase foreign currency income for the country [26].

Since 2020, the global economy has been in a state of turbulence. The main factor in its decline was the COVID-19 pandemic, compounded by the full-scale invasion of Russia into the territory of independent Ukraine. This prompted a corresponding reaction from the civilized world to the aggressor country's violation of moral, social, legal, and other norms of international coexistence. The consequences of these events have caused significant damage not only to the socio-economic development of humanity but also to international tourism, including the domestic tourism of certain countries worldwide. Most experts believe that the recovery process will take 3-5 years. However, the issue of the revival of the tourism industry is already relevant, alongside the restoration of certain sectors of the world economy and national economies [27].

2020 marked the worst year in the history of world tourism. The COVID-19 pandemic caused an unprecedented drop in international travel, resulting in significant losses for the industry. International tourist arrivals plummeted from 1.5 billion in 2019 to 400 million in 2020, a decline surpassing the drop in tourism during the global economic crisis of 2009.

International tourism receipts and total export revenues from tourism (including passenger transport) decreased by 63% in 2020, with losses in income amounting to 1.1 trillion US dollars.

The COVID-19 pandemic has led to various travel restrictions, including border closures, quarantines, and mandatory testing. These restrictions have significantly impacted cross-border mobility and made travel inconvenient. A lack of coordination between countries in terms of health protocols and restrictions has also added to uncertainty and weakened demand (Figure 1).

In 2021-2022, the tourism industry on the international market returned to the level of 2019, as the main indicators of losses from the liquidation of the consequences of the COVID-19 pandemic demonstrate the following:

- international tourist movements worldwide fell by 73.9%.

- the loss of export earnings from international tourism is estimated at 1.3 trillion USD.

- approximately 100-120 million tourism workers are at risk.

- estimated losses in world GDP exceed 2 trillion USD.

The share of tourism in the world economy fell by half: in 2019, it was 10.4%, and in 2021, it fell to 5.5% due to the coronavirus pandemic. Before the pandemic, the travel and tourism industry accounted for 10.6% of all jobs (334 million people) and 10.4% of global GDP (9.2 trillion USD) [29].

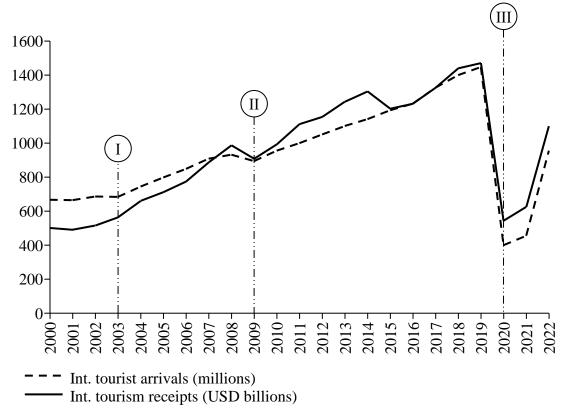
In 2022, the tourism sector decreased by 18.5%, losing 62 million jobs; time spent by domestic visitors decreased by 45%, and by international visitors by 69.4% [30].

Asia and the Pacific were the first to feel the impact of the pandemic and experienced the most significant declines. In 2020, the number of international tourists to the region fell by 84%, meaning the region had approximately 300 million fewer tourists than in 2019.

Europe recorded a drop in the number of tourists by 68%. This represented the most substantial decline in absolute terms, as the region saw more than 500 million fewer tourists than in 2019.

The countries of the Americas were also significantly negatively affected. In 2020, the number of international tourists in this region fell by 68%. This means that there were approximately 150 million fewer tourists in the region than in 2019.

The Middle East and Africa also experienced a significant decrease in tourist arrivals. In 2020, the number of international tourists in these regions fell by 73%.



Ι	SARS (2003)	-3 million (-0.4%)	+USD 50 billion (-2%) <sup>1</sup>
II	Global econ. crisis (2009)	-37 million (-4%)	-USD 78 billion $(-4\%)^1$
III	COVID-19 (2020)	-1.1 billion (-72%)	-USD 930 billion (-63%) <sup>1</sup>

<sup>1</sup> Change in real terms (local currencies, constant prices)

**Fig. 1.** Dynamics of international tourist arrivals and revenues from tourism [28]. Source: World Tourism Organization (UNWTO)

In 2021, world tourism began to recover. The number of international tourists increased by 28% compared to 2020. However, this was still 42% below 2019 levels.

A significant improvement is observed in Europe and the American countries. In Europe, the number of international tourists increased by 30%, and in America - by 25%.

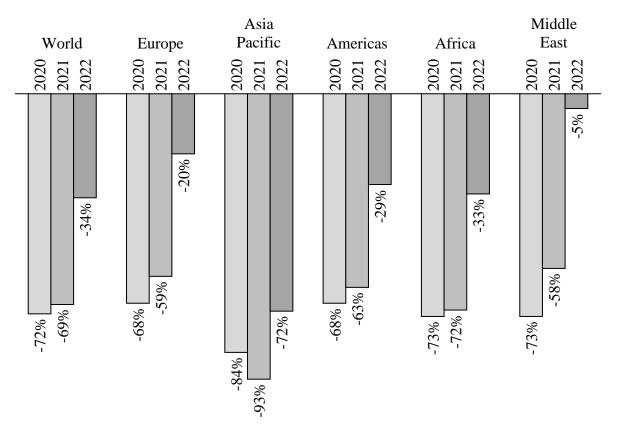
Asia and the Pacific lag behind Europe and the Americas in recovery. This is due to the fact that many countries in the region remained closed to non-essential travel until the end of 2021 (Figure 2).

The Caribbean Islands performed the best in 2021 compared to 2019. In this region, the number of international tourists increased by 55%.

Southern Mediterranean Europe also experienced a significant rise. In this region, the number of international tourists increased by 42%. This is attributed to the fact that these regions are popular holiday destinations and were relatively quickly opened up to international travel [31].

The Middle East performed exceptionally well in 2022, reaching 95% of pre-pandemic arrivals (a 5% decrease compared to 2019). This success can be attributed to the region's quick opening to international travel and its offering of many attractive tourist destinations, including beaches, historical sites, and cultural activities.

In second place are the countries of Europe (-20%) and America (-29%), as the pandemic gradually receded and travelers' confidence returned. This is due to the fact that these regions are popular destinations for tourists from around the world, and many European countries have introduced easy entry rules.



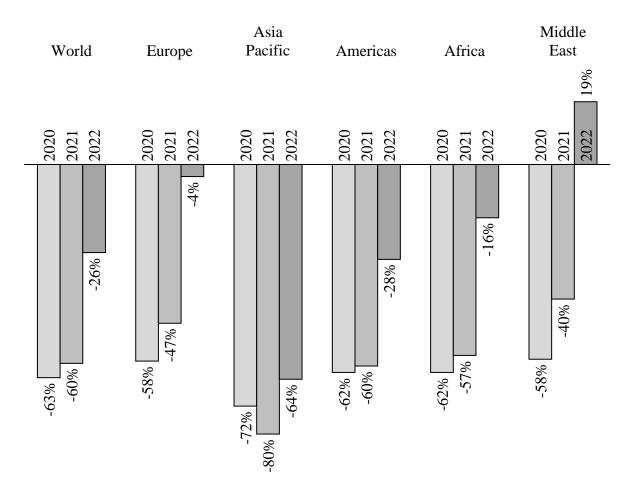
**Fig. 2.** Dynamics of international tourist arrivals in % until 2019. [28]. *Source: World Tourism Organization (UNWTO)* 

International tourist arrivals recovered faster in Europe. In 2021, global tourism destinations recorded a moderate improvement in revenues, although revenues remained significantly lower than in the pre-pandemic years. The Middle East and Europe performed best in terms of revenue in 2021, growing by 42% and 23%, respectively, compared to 2020, but still remaining 40% and 47% below 2019 figures (in local currencies and constant prices). Tourism revenues in Africa and the Americas are expected to grow by 13% and 6%, respectively, in 2021 but remain 57% and 60% below prepandemic levels. Asia Pacific was the weakest performer in 2021, with revenues down 80% from 2019 as many destinations remained closed to non-essential travel. In 2022, the Middle East shows a revenue recovery of 19% above pre-pandemic levels, while Europe has recovered 96% (a 4% decrease compared to 2019) (Fig. 3).

Thus, the tourism industry faced a deep crisis during the COVID-19 pandemic. In 2020, the number of international tourist arrivals (guest stays) fell by 72%, from 1.464 billion to 407 million. This decline was caused by global lockdowns, travel restrictions, and reduced demand from visitors.

In 2021, arrivals increased slightly but still remained 69% below 2019 levels. Although there was a partial recovery in international travel in 2022, arrivals were still 34% below pre-pandemic levels.

The pandemic has resulted in a loss of 2.6 billion international tourist arrivals in 2020, 2021, and 2022. This is almost double the number of arrivals recorded in 2019. As a result, export earnings from international tourism fell by 63% in 2020 and by 60% in 2021. In 2022, they recovered, but were still 24% below pre-pandemic levels. The total loss in export earnings from tourism is \$2.5 trillion.



**Fig. 3.** Dynamics of income from international tourism in % until 2019 [28]. *Source: World Tourism Organization (UNWTO)* 

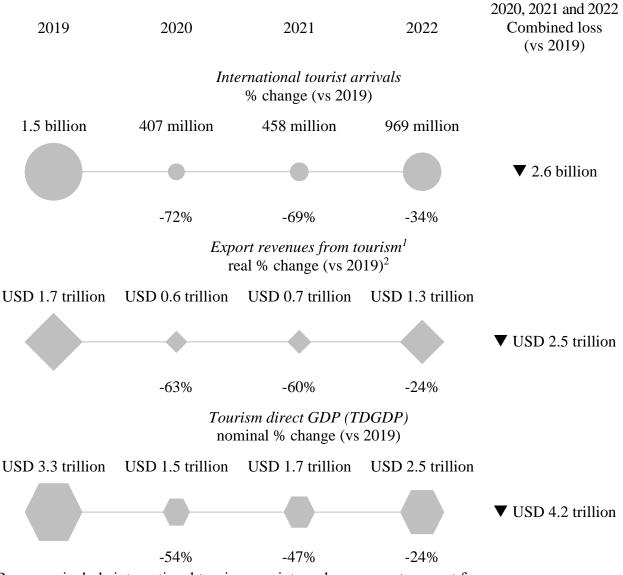
The pandemic has also taken a significant toll on tourism's economic contribution. It was halved in 2020 and 2021, dropping from 4% of global GDP to 2%. It rose to 2.5% in 2022 but was still below pre-pandemic levels. The total losses for these three years amount to 4.2 trillion US dollars (Fig. 4) [28].

During the first seven months of 2023, all regions of the world experienced a robust recovery in tourism, driven by demand for international travel from several major outbound markets:

The Middle East reported its best performance in January-July 2023, with arrivals up by 20% compared to 2019. This region remains, so far, the only one that has exceeded the pre-pandemic level.

European countries have reached 91% of pre-pandemic levels during this time, driven by strong intra-regional demand and travel from the United States.

African countries have recovered 92% of pre-pandemic visitor numbers over the past seven months, and American countries have recovered 87%.



<sup>1</sup> Revenues include international tourism receipts and passenger transport fares.

<sup>2</sup> In local currencies and constant prices.

**Fig. 4.** Impact of the coronavirus pandemic on world tourism [28]. *Source: World Tourism Organization (UNWTO)* 

In the Asia-Pacific region, recovery accelerated to 61% of pre-pandemic arrival levels following the opening of many destinations and exit markets in late 2022 and early 2023 [32]. At the same time, experts believe that the number of international arrivals will only return to the level of 2019 in 2024 (Fig. 5).

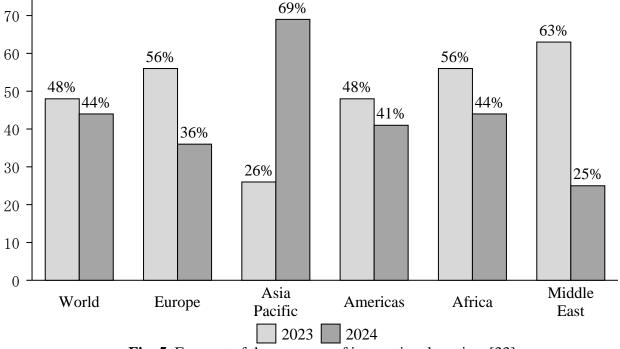


Fig. 5. Forecast of the recovery of international tourism [33].

Scientists outline global trends in the development of society and markets that will affect tourism and hospitality in the near future, including:

1. Health and safety priority. The modern tourist prefers safety, hygiene, and measures to preserve health. Consumer trust is based on the reliability and security provided by travel businesses.

2. Changes in consumer behavior. Fewer spontaneous trips. Due to the decrease in the purchasing power of consumers, their main focus becomes the planning of basic expenses and the deliberate choice and planning of trips. There is a decrease in spontaneous trips and an increase in demand for the services of well-known brands with a high level of service.

3. Striving for a unique emotional experience. The personalization of travel, the growth of selfmade tourism, the digital transformation of the industry, the desire to interact with local culture, and meaningful consumption contribute to the growth of niche tourism destinations.

4. New forms of employment. Remote work becomes mutually beneficial for employers and employees, contributing to increased productivity and the possibility of combining work with rest. There is a demand for real estate in locations conducive to remote work.

5. Digital transformation. The use of modern means of communication simplifies business processes and allows tourists to independently form a tourist product.

6. Priority of ecotourism. As a result of the pandemic and the geopolitical situation, the choice of tourists in favor of «green» destinations, trips to nature, and the development of ecotourism is increasing.

At the same time, geopolitical factors that determine the current and future position of countries in international relations and shape the evolution of the system itself can manifest themselves in many ways:

- can contribute to the stabilization of the situation in case of strengthening of international cooperation and interaction. Countries in similar geopolitical conditions have similar or similar national interests, which facilitates their cooperation, including strengthening military security. Such a collective approach contributes to development both at the regional and global levels.

- may lead to competition between states. A key role in this is played by territorial claims, geopolitical conflicts, and the desire to put another state at a disadvantage in the international arena[34].

Therefore, the restoration of the international tourism market requires the joint efforts of all interested parties, including governments, tourism enterprises, airlines, insurance companies, etc.

Recommendations for the recovery of the international tourism market include:

1. Coordination of actions of the governments of different countries: Governments should cooperate in the development and implementation of joint measures to restore international tourism. In particular, they should provide safe conditions for travel, simplify the entry and exit of tourists, as well as promote cooperation between tourism enterprises of different countries. Governments can also provide subsidies to tourism enterprises that develop new tourism products and services. This will help enterprises to develop new markets.

2. Development of new tourist products and services: Tourist enterprises should develop new tourist products and services that meet the needs of modern tourists. This will allow meeting the needs of new segments of the tourism market, in particular, family tourists, tourists with disabilities, as well as tourists looking for environmentally friendly and responsible travel. In particular, it can be ecotourism, agrotourism, medical tourism, as well as virtual tourism. In addition, travel companies can offer tourists travel packages that include visits to several countries. This will help stimulate international tourism.

3. Innovations in the field of tourism marketing: Tourism businesses must use innovations in tourism marketing to promote their products and services. In particular, they can use social networks, virtual and augmented reality. This will help attract a new audience.

4. Infrastructure development: Governments and tourism enterprises should invest in the development of tourism infrastructure. In particular, this may include the construction of airports, hotels, tourist routes, and other facilities. This will help expand the tourist infrastructure.

The implementation of these measures requires time and resources, but they are necessary for the recovery of the international tourist market and ensuring its further effective development.

It is also important to note that the recovery of the international tourist market will take place gradually. This is due to the fact that the COVID-19 pandemic has led to a change in the behavior of tourists. Many people have become more cautious and prefer traveling to safe countries with developed tourist infrastructure. However, if the necessary measures are implemented, it can be expected that by 2025, global tourism will recover to the level it was before the pandemic.

#### 7. Prospects for further research development

The COVID-19 pandemic and the full-scale invasion of Russia on the territory of Ukraine caused significant damage to the tourism industry. However, despite these challenges, tourism remains one of the most important sectors of the world economy.

The recovery of the tourism industry will take place gradually, and scientific research will play an important role in this process. In the near future, promising areas of research in the field of tourism are:

- Study of the impact of the COVID-19 pandemic and geopolitical conflicts on tourism: These studies will help understand the changes that have occurred in the behavior of tourists and in the structure of the tourist market.

- Research of new trends in the development of tourism: Such trends include, in particular, the priority of health and safety, changes in consumer behavior, the desire for a unique emotional experience, new forms of employment, digital transformation, and the priority of ecotourism.

- Development of new methods and technologies to increase the efficiency of tourism activities: These can include methods and technologies to ensure the safety of tourists, personalization of the tourist experience, digital marketing, and the management of tourist flows.

## 8. Conclusions

The study showed that the COVID-19 pandemic, the full-scale invasion of Russia on the

territory of Ukraine, and geopolitical factors led to a significant decline in the development of the tourism industry. In 2020, international tourist arrivals fell by 72%, from 1.464 billion to 407 million. Arrivals rose slightly in 2021, but still remained 69% below 2019 levels. There was a partial recovery in international travel in 2022, but arrivals were still 34% below pre-pandemic levels.

Geopolitical factors can lead to diverse consequences for the development of the tourism industry. In the case of strengthening international cooperation and interaction, they can contribute to the stabilization of the situation and the development of tourism. In the case of conflicts between states, they can lead to a decrease in the level of trust in tourist destinations located in these countries and a reduction in the demand for tourist services.

To restore the tourism industry and overcome the negative consequences of the COVID-19 pandemic and the full-scale invasion of Russia on the territory of Ukraine, the following measures must be taken:

- ensure safe conditions for travel;

- strengthen the trust of consumers in tourist enterprises;

- expand the offer of tourist products;

- promote the development of digital transformation in the industry.

Implementation of these measures will contribute to the recovery of the tourism industry and ensure its sustainable development in the future.

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