

Deliverable 2.1

STATE OF ART ANALYSIS

The impact of COVID-19, and the current tourism models and approaches applied in the partners countries



Union for the Mediterranean
Union pour la Méditerranée
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The partnership



European Institute for Local Development



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I. Introduction

Tourism provides livelihoods for millions of people and allows billions more to appreciate their own and different cultures as well as the natural world. For some countries, it may account for more than 20% of their GDP and, overall, is the third largest export sector of the world economy. Tourism is one of the sectors most affected by the COVID-19 pandemic, affecting economies, livelihoods, public services and opportunities on all continents. While maintaining sector-dependent livelihoods must be a priority, tourism reconstruction is also an opportunity for transformation with a focus on harnessing the impact on the destinations visited and creating more resilient communities and businesses through innovation, digitization, sustainability and partnerships (UN Sustainable Development Group, 2020). The pandemic has shifted the focus of travel and tourism worldwide, and concepts such as resilience, rebirth, community, sustainability and responsibility have gained more weight and are gaining the attention of policymakers (DestiMED PLUS Project report card 1, 2021).

According to 2019 data, tourism accounted for 7% of world trade, employed one in ten people worldwide and - through a complex value chain of interconnected industries - provided a livelihood for millions of people in developed and developing countries. As borders closed, hotels closed and air travel dropped dramatically, international tourist arrivals fell by 56% and \$ 320 billion in tourism exports were lost in the first five months of 2021 - more than three times the losses during 2009 global financial crisis Governments are struggling to make up for lost revenue needed to finance public services, including social and environmental protection, and meet debt repayment schedules. Scenarios for the industry show that the number of international tourists could decrease by 58% to 78% in 2020, which would translate into a reduction in visitor spending from \$ 1.5 trillion in 2019 to \$ 310 billion to \$ 570 billion in 2020 This exceeds 100 million direct tourist destinations at risk, many of them in micro, small and medium-sized enterprises (SMEs) that employ a high percentage of women and young people. Informal workers are the most vulnerable.

No country has escaped the decimation of its tourism sector, from Italy where tourism accounts for 6% of the country's GDP to Palau where it produces almost 90% of total exports. This crisis is a major shock to developed economies and an emergency for the most vulnerable people and developing countries. The impact on small island developing countries (SIDS), less developed countries (LDCs) and many African nations is worrying. In Africa, the sector accounted for 10% of total exports in 2019 (UN Sustainable Development Group, 2020).

The COVID-19 crisis is a critical moment in aligning efforts to conserve tourism-dependent livelihoods with the Sustainable Development Goals and to ensure a more sustainable, inclusive, carbon-neutral and efficient future.

Harnessing innovation and digitalization, embracing local values, and creating decent jobs for all, especially for youth, women and the most vulnerable groups in our societies, could be front and center in tourism's recovery. To that end, the sector needs to advance efforts to build a new model that promotes partnerships, places host people at the center of development, advances evidence-based policies and carbon neutral investment and operations (UN Sustainable Development Group, 2020).

A roadmap for tourism transformation must address five priority areas:

Manage the crisis and change the socio-economic implications on life, especially women's work and financial security

Gradual and coordinated solutions and responses should be implemented to: i) protect livelihoods, jobs, income and businesses. (ii) build trust through safety and security in all tourism activities. (iii) strengthening partnerships and solidarity for socio-economic recovery by giving priority to integration and the reduction of inequalities (Tourism and the Sustainable Development Goals – Journey to 2030, 2017)..

Strengthen competitiveness and build resilience

Support the development of tourism infrastructure and quality services throughout the tourism value chain; facilitate investment and build a favorable business

environment for local SMEs, diversify products and markets, and promote domestic and regional tourism where possible (Tourism and the Sustainable Development Goals – Journey to 2030, 2017)..

Advancement of innovation and digitalization of the tourism ecosystem

Recovery packages and future tourism developments could maximize the use of technology in the tourism ecosystem, promote digitization to create innovative solutions and invest in digital skills, especially for temporary and non-occupational workers (Tourism and the Sustainable Development Goals – Journey to 2030, 2017)..

More Sustainability and including green development

It is important for tourism to focus on a resilient, competitive, resource-efficient and carbon-neutral sector, in line with the objectives and principles of the Paris Agreement on Climate Change and the 2030 Agenda for Sustainable Development. Green investments for recovery could target protected areas, renewable energy sources, smart buildings and the circular economy, among other opportunities. Government financial and financial support to the accommodation, cruise and aviation industries could also ensure that unsustainable pollution practices are prohibited (Tourism and the Sustainable Development Goals – Journey to 2030, 2017).

Coordination and cooperations for tourism transformation and achievement of objectives

More flexible approaches and alliances will be needed to move towards a sustainable future and global goals. The UNWTO World Tourism Crisis Committee has united the tourism sector to formulate a pan-European response to the unprecedented challenge of the COVID-19 pandemic. Effective coordination of restructuring and recovery plans and policies could consider putting people first, with the involvement of government, development partners and international financial institutions for a significant impact on economies and livelihoods (Tourism and the Sustainable Development Goals – Journey to 2030, 2017).

In 2019, international tourist arrivals reached 1.5 billion, an increase of 4% compared to 2018, establishing a record of a decade where tourism grew faster than the global economy as a whole. Domestic tourism added an additional 8.8 billion arrivals. The sector generated \$ 1.5 trillion in exports and employed one in ten people directly or indirectly. Tourism stopped in mid-March 2020. International tourist arrivals fell by 56 percent in the first months of the year, with numbers falling by 98 percent in May. That translates to a loss of nearly \$ 320 billion in exports - three times what was lost during the global financial crisis of 2009. This has led to several airlines, including South African Airways, Avianca Holdings, Air Mauritius, Virgin Australia, Miami Air International, BRA, Flybe, RavnAir, Air Deccan and Trans States Airlines, to declare bankruptcy. Future scenarios show possible reductions in arrivals and receipts from international tourism by 58% to 78% for the whole year, depending on the speed of the pandemic, the duration of travel restrictions and the gradual opening of the border. has started but remains uncertain. Destinations and businesses related to tourism do not have the "luxury" they once had to depend on profitability from the large number of tourists. This huge shock could translate into a drop of 850 million to 1.1 billion international tourists and a loss of \$ 910 billion to \$ 1.2 trillion in tourism export revenue, putting 100 to 120 million direct tourism jobs at risk. This is particularly critical as about 80% of all tourism businesses are SMEs. Significant challenges lie ahead, including the unknown evolution of the pandemic and how consumer confidence will recover. The global economy is projected to shrink sharply by 4.9% in 2020, although the outlook is expected to grow in 2021, according to the International Monetary Fund. Although countries and international organizations have implemented a number of measures to mitigate the socio-economic impact of COVID-19 and to stimulate the recovery of tourism, the magnitude of the crisis requires additional efforts and ongoing support (UNWTO, 2020).

II. Literature Review

The omission of these global risks is systemic, as no efforts are made to economically reflect these in balance sheets or fares. Climate change and pandemics thus represent market and policy failures in which the risk of potentially very significant future disruptions of the socio-economic system is imposed on society (R. Doganis, 2005). Studies have measured the overall economic impact of more recent pandemics. Eichenbaum et al. (2020) developed a theoretical epidemiology model to study the impact of the synchronous pandemic. More importantly, a systematic review of the publications on COVID-19 and tourism would make it possible to reveal the typologies of tourism, the forms of its management, and expected changes in tourist behavior, which will gain comparatively more importance at the global level in the so-called new normal (Casado-Aranda et al., 2021)

The intention to travel is influenced by different factors, one of which is the perceived risk of travel. While the risks involved in tourist activities can take different forms, the most widely perceived risk in 2020 was possibly the threat of contracting COVID-19. Some authors discuss the risk of man-made and natural disasters and their long-term influence on tourism. Many destinations are affected by natural and human-made crises and, over the years, have developed tactics and strategies of resilience and mitigation (Ritchie & Jiang, 2019). The crisis stemming from the Covid-19 pandemic, however, has been different and unique in many ways. The impact of the COVID-19 epidemic and its restrictions could be described globally. According to the Industry Pulse Report (2020), the estimated impact of COVID-19 was around 100 million job losses and 2.7 trillion USD decline of GDP for 2020. These data were based on middle June 2020 data.

Research on the impact of the COVID-19 pandemic on tourism, tourism resilience, and recovery policies and strategies are in progress, being both conceptual and empirical but rare due to scarcity of data. Compared to the earlier epidemics, the impact of COVID-19 on the tourism sector will be significantly different. Although vaccination campaigns are remarkably successful, the pandemic is not yet under

control. In addition, mutations in the virus increase the unpredictability of the pandemic, making research crucial to facilitate the recovery of tourism and its associated industries (Varzaru et al., 2021).

While this global pandemic is far greater than the SARS outbreak, there are three other major differences. First, travel has grown rapidly since the early 2000s when SARS hit, with arrivals more than doubling between 2000 and 2019. Secondly, the emergence of social media as a means of sharing information is compounding uncertainty and has led to heightened anxiety in relation to travel. This is likely to continue into the recovery period. Thirdly, the median age of the global population is higher than ever before. This means there is a larger, older population that is more at risk (World Bank Group's Markets & Technology Global Tourism Team, 2020).

According to Gössling (2020), the pandemic caused by COVID-19 is a significant challenge for the whole world. Due to the lack of a vaccine and the limited medical possibilities to treat this disease throughout 2020, hygiene measures, social distancing, quarantine, and traffic restrictions have been the primary strategy to combat the pandemic. As a result of social distancing measures and regulations on domestic and international traffic, tourism has been virtually stopped for a few months from March 2020 worldwide. Tourism was the economic branch that proved most vulnerable to measures to combat the pandemic

Moreover, Higgins-Desbioles (2021) believes that the pandemic generated by COVID-19 will change the tourism industry and the environment in which it operates. This global crisis may be a source of opportunity to identify new possibilities, and the problematic situation is an additional argument for accepting changes in tourism business models towards sustainability. One of the critical effects that the COVID-19 pandemic had on tourism was accelerating the digitization of processes in the tourism industry, as stated by some authors.

Another spillover effect of the pandemic crisis on the global economy and environment was reducing GHG emissions caused by decreasing travel. This side effect can be, at the same time, an opportunity to rethink sustainable tourism models (Abbas, J.; Mubeen, R., 2021). According to Niewiadomski (2020), temporary

deglobalization offers tourism an unprecedented opportunity to develop respecting the principles of sustainable development by combating over-tourism that generates extremely adverse effects such as environmental destruction, economic exploitation, or overpopulation.

III. Methodology

The approach taken is that of a narrative review of relevant existing literature. It focuses on an analysis and interpretation from a theoretical and contextual perspective of the main topic. Regarding the working materials for the development of this analysis, it is necessary to illustrate the relationship between the tourism sector and the outbreak of COVID-19 in Mediterranean countries. For this purpose, the Mediterranean regions that were gravely affected by the pandemic were selected to study. The paper deals with the measures taken by EU countries against the pandemic. Through the analysis, it is examined whether there was any relationship between the impact of confirmed cases and the most tourist regions. The study aims to evaluate the impact on the supply side and demand of tourist services, which implies estimations not only on the impact that mobility restrictions may have caused on tourists' movements, but also the contraction in the tourism services supply.

A comparative analysis has been applied in order to examine distinctive regions. The comparative method is an effective tool when it comes to describing complex events, which are important from a social, economic, or political point of view, and which have differentiated impacts in the different areas or territories. Regarding the impact of COVID-19, the sources used are based on a large volume of statistical information, obtained directly from national and international organizations or from other secondary studies. COVID-19 data corresponding to the Mediterranean provinces was downloaded from official sources of epidemiological information, such as the World Health Organization, which allowed us to assess the trends across regions. On the other hand, socio-economic and tourist data have been collected from the

National Statistics Institutes as well as Eurostat, among others. Several variables have been considered for the analysis of the impact of this crisis in these countries: GDP of each region, unemployment rates, tourist arrivals variation rates (international and domestic tourism), and the supply of tourist services.

To analyze the impact of the pandemic on the tourism sector, data from the United Nations World Tourism Organization (UNWTO) and World Tourism Barometer offered great guidance and facilitated the development of the current analysis. In addition to that, World Travel and Tourism Council statistics and specific data were consulted for the drawing of the following results and conclusions. A part of the case studies was derived from the Organization for Economic Co-operation and Development and was subsequently further analyzed and commented in accordance with the perspective of the study. To investigate the effects of the economic and health crisis caused by COVID-19 on the tourism industry, also data regarding tourism evolutions and COVID-19 cases and deaths was collected from Eurostat.

IV. New and Old Models

The tourism industry was in full expansion in the Mediterranean region when the 2020 pandemic of COVID-19 shut down travelers globally, bringing about disastrous consequences for the economy of Mediterranean countries and for the tourism industry in particular. While a return to normalcy may take time, national recovery plans are being implemented to overcome the crisis's economic and social impacts. Additionally, some initiatives are emerging on both sides of the Mediterranean region to rebuild the industry into a more sustainable and fairer one (eco-union, 2021).

Recovery packages could have a special focus to maximize the use of technology, advance the digitalization of MSMEs, promote network processes to create

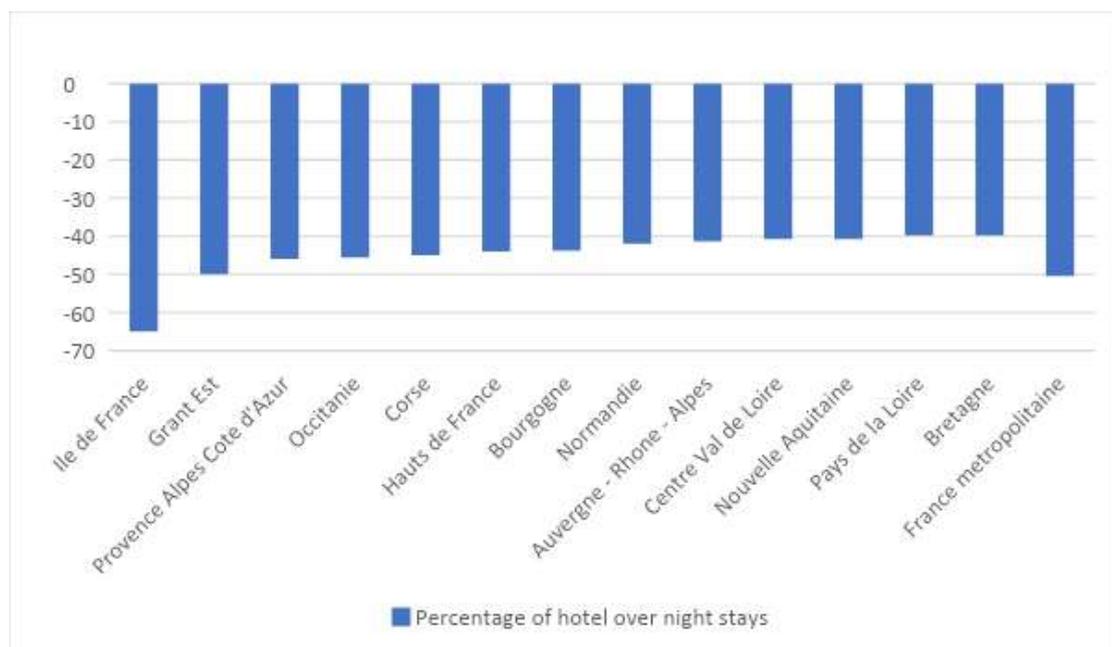
innovative solutions and invest in digital skills, particularly for workers, including female and youth, temporarily without an occupation and job seekers (ILO, 2021).

Several countries have approved special funds to support start-ups, such as Portugal “Mezzanine” Funding for Start-ups COVID19 (this includes start-ups in the tourism sector) –which injects liquidity into companies (already invested) through debt instruments convertible into share capital. Moreover, in Portugal, Turismo de Portugal created a “Clean & Safe” certificate that recognizes companies in the tourism sector that comply with the minimum hygiene and cleaning requirements for the prevention and control of COVID-19. Developed in collaboration with Portugal’s health department, obtaining the certificate requires the implementation of an internal protocol which states that the company is following the necessary hygiene measures in accordance with the established recommendations by the Directorate-General for Health. The certification is free, can be obtained online, and is valid for one year. Random audits will be carried out by Turismo de Portugal. Turismo de Portugal has also gone further describing how it would now prioritize email over paper communications, and that hotel grading inspections are now carried out via Zoom (UNWTO, 2020).

Since March 2020, Turismo de Portugal has also provided a specialized online support service, provided by a team of 60 trainers from its official Hotel and Tourism Schools who are available to help companies to provide advice in dealing with specific operational issues and, helping to minimize the impact of Contingency Plans for COVID-19. Furthermore, the NTO which runs 12 official schools in the country (with around 3,000 graduates per year) opened its online courses for free in June 2020, to enable all professionals in Portuguese-speaking countries in the world to benefit from online educational content. In addition to this, Turismo de Portugal provides a daily update of market information (air transport, reservations, tour operators and travel restrictions) for tourism businesses, submitted by the offices of Turismo de Portugal worldwide and publicly available on Turismo de Portugal’s knowledge management platform, Travel BI (OECD, 2020).

In the rest of the European continent, Italy, Spain and France, accounting for half of the sectors, were the hardest-hit from the pandemic. In France, missing tourist

expenditures are estimated to be responsible for 12.4 percentage points of overall consumption loss during one month of confinement and closed borders. During the 2020 summer, hotel bookings fell to 45 million overnight stays in 2020 from 69 million in 2019 across the country. At the beginning of 2020, the arrivals and accommodation decrease 50% and until March, a great number of have been closed. Approximately, one out of five hotels remained open until April. However, the countryside and the seaside were impacted less as campaigns to convince the French to travel within France seemed to have worked (Statista, 2021).



(INSEE, Reports on the pandemic impact on tourism across the nation)

Measures enforced by the government to remedy the situation include a credit facilitation instead of refunds for the hotels and accommodations suffering cancelled bookings, as well as 18€ billion to support the various actors of the tourism sector.

Furthermore, the Greek economy has traditionally been more heavily reliant than other EU countries on the provision of economic activities that entail interactive service provision, most notably via its significant tourism industry as well as its relatively larger wholesale and retail trade and public administration service sectors. This is another factor which weighed heavily on the country’s ability to mitigate the adverse economic and social consequences of the Covid-19 shock. Shortly after the first case of Covid – 19 in Greece, the government had taken widespread measures

(i.e., the closure of educational institutions and non-essential services) in order to prevent the spread of the virus in the very early stages (11th March), and it progressed to a complete lockdown and prohibition of movement on 23rd March (OECD, 2020).

These decisions were taken because of: the lessons learnt from countries (e.g. Italy) that already had a substantial number of COVID19 fatalities; the shortage of intensive care units (less than 550 beds throughout the country) (Sarris, 2020); the extensive lack of medical and paramedical personnel; and the overall bad shape of the national health system (in the last decade 70,000 beds were lost and 359 hospital departments were closed) due to extensive budget cuts made over more than a decade to tackle the Greek economic crisis. These early-stage measures led to a very low number of fatalities (less than 200) during the first wave (spring 2020) of COVID19. Conversely, in terms of handling the socio-economic crisis generated by the pandemic, Greece showed one of the worst performances among EU member states. Indicatively, when most EU countries were subsidizing 70 to 100 percent of lost salaries, Greece was only covering 50 percent, the level of financial support for the unemployed (800 €) was one of the lowest in the EU, and there was no protection of collective employment agreements or mechanism for avoidance of redundancies (OECD, 2020).

It should also be noted that COVID19 had already devastated the Greek tourism and hospitality industry, a sector that contributes approximately 20 percent of the country's Gross Domestic Product GDP. According to the IMF, COVID19 has caused Greece to face a 10 percent loss in GDP during 2020, and a 5.1 percent loss in 2021. Approximately 34.2 million arrivals were recorded at travel accommodation in Greece in 2019. International tourism was the highest contributor, with around two thirds of arrivals in visitor accommodation coming from a foreign country. In April 2020, arrivals at accommodation establishments in Greece fell to around an estimated 12 thousand due to the coronavirus (COVID-19) pandemic, down from 1.28 million recorded in the same period a year earlier. In total, the country welcomed about 7.4 million international travelers, experiencing a great decrease in comparison to the previous statistics (OECD, 2020).



(The Bank of Greece, Greece Visitor Arrivals)

To summarize, during the first wave of the pandemic Greece did not face a health crisis. Due to the effective risk management employed through widespread measures taken at a very early stage, Greece has avoided a crisis pandemic. On the other hand, the national economy, already weakened by a prolonged recession, was severely hit by COVID19, whilst the measures taken to avoid the socio-economic effects of the pandemic were at best inadequate (Parpapani et al., 2020).

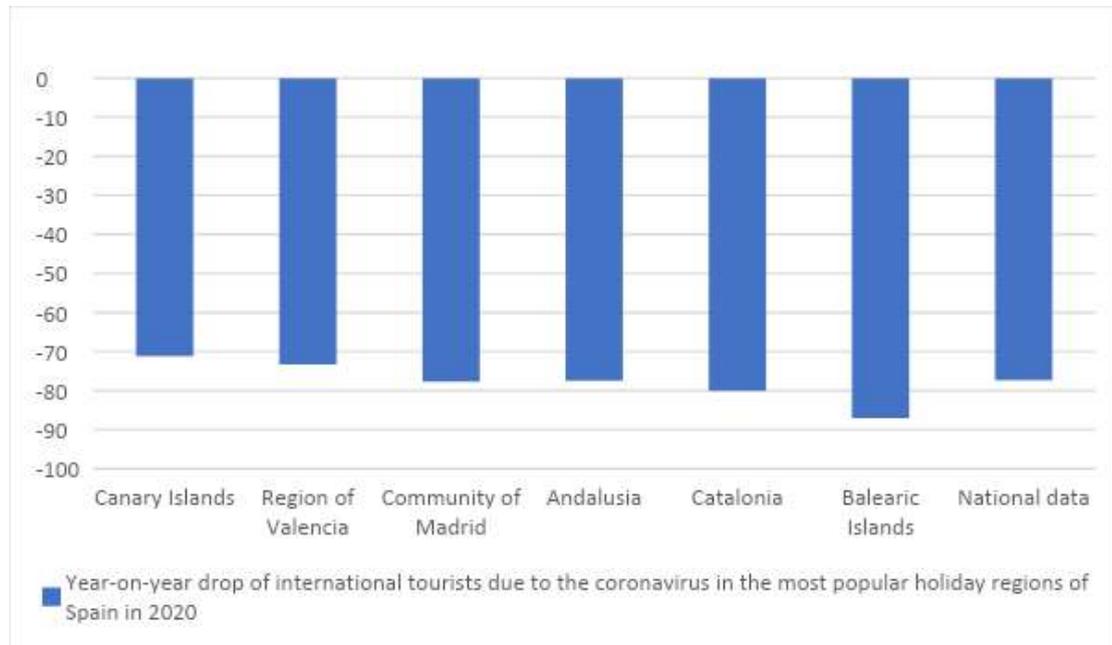
Moreover, specific actions of support have been implemented specifically oriented towards workers. In Greece workers whose labor contracts are temporarily suspended will receive compensation while the state will cover their social insurance and health contributions. During the times of economic crisis some innovative forms of cultural tourism have progressively commenced to appear reflecting the creativity of young people trying to escape from the road of an economic dead end. This development concerns forming a new tourism-travel experience, in addition to the traditional context of traveling for vacation, and touches on many parameters such as the environment, culture, gastronomy and overall sustainability, highlighting that the international traveler is now seeking a “holistic experience” that also focuses on health and safety issues, as well as improved services and activities, in addition to the already established “sun and sea” model. It would be interesting to mention here some alternative tourism networks such as “Couch Surfing” or “Squat the Planet” that work outside the mainstream commercial economic system. Similar initiatives can be followed for the confrontation of the upcoming crisis and economic

difficulties of the sector. Innovation, creativity and authenticity in tourism have much in common (Tsangaris, 2020).

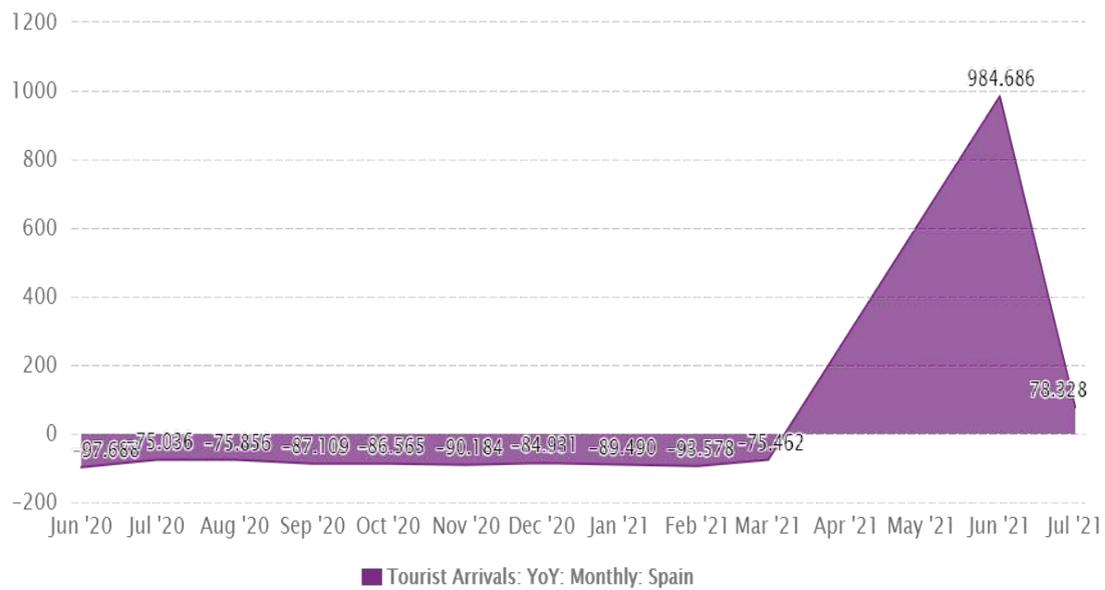
In Cyprus, an island that is firmly established as a mass market, summer-sun destination, not only have efforts to diversify markets proved to be relatively fruitless, but certain policies, such as encouraging low-season and special interest tourism, have also met with little success. The agro-tourism project, for example, has redirected investment away from the major resorts yet, with a total of just 450 bed spaces currently available, it is unlikely to be a major source of income for rural areas and will do nothing to relieve the pressure on coastal resorts. During the pandemic, according to the Statistical Service, in Cyprus a total of 100.852 tourist arrivals were recorded in May 2021, compared to zero arrivals recorded in May 2020, a period during which measures were implemented to prevent the spread of the coronavirus pandemic (COVID-19) in Cyprus. According to these measures, there was a ban of entry to the Republic on several categories of persons, including tourists. As compared to May 2019, when 434.578 arrivals were recorded, there was a decrease of 76,8%. Cyprus has approved a fund for the implementation of actions to support tourism in cooperation with airlines and travel operators, as well as actions to boost tourist demand from October 2020 to March 2021 (CYSTAT, 2021).

In Albania the Ministry of Tourism and Environment, in collaboration with the Ministry of Health and Social Protection, drafted “The protocol of Anti-COVID 19 measures during tourism season 2020”, which aims at guiding and regulating the necessary preconditions to be undertaken by tourism companies towards restarting the tourism season and to protect employees and visitors. Additionally, in the Divjakë-Karavasta National Park in Albania a more resilient form of tourism is offered as it encourages greater participation from local service providers. The role of the local community is vital, increasing the authenticity of the product they are developing, ensuring that income from tourism is going directly back into the local community and raising awareness about the importance of conservation. Becoming service providers makes them aware of their impact and the power they have in the protection of natural resources (Burlea-Schiopoiu & Ozuni, 2021).

In the Northern Mediterranean, Spain is the country which suffered the most from the COVID-19 outbreak. The government adopted measures such as tax deferrals and exemptions, and protected the workers affected by the crisis through temporary employment adjustment schemes (Ramos, 2020).



In 2020, the arrival of tourists to Spain from abroad fell by 77% compared to 2019. In Andalusia, the Community of Madrid, Catalonia and the Balearic Islands the drop was even greater. In the Balearic archipelago, the most affected region, the loss of inbound tourism with respect to the previous year exceeded 87% (Ramos, 2020).



(Ministry of Industry, Energy and Tourism, Spain Visitor Arrivals Growth rate data)

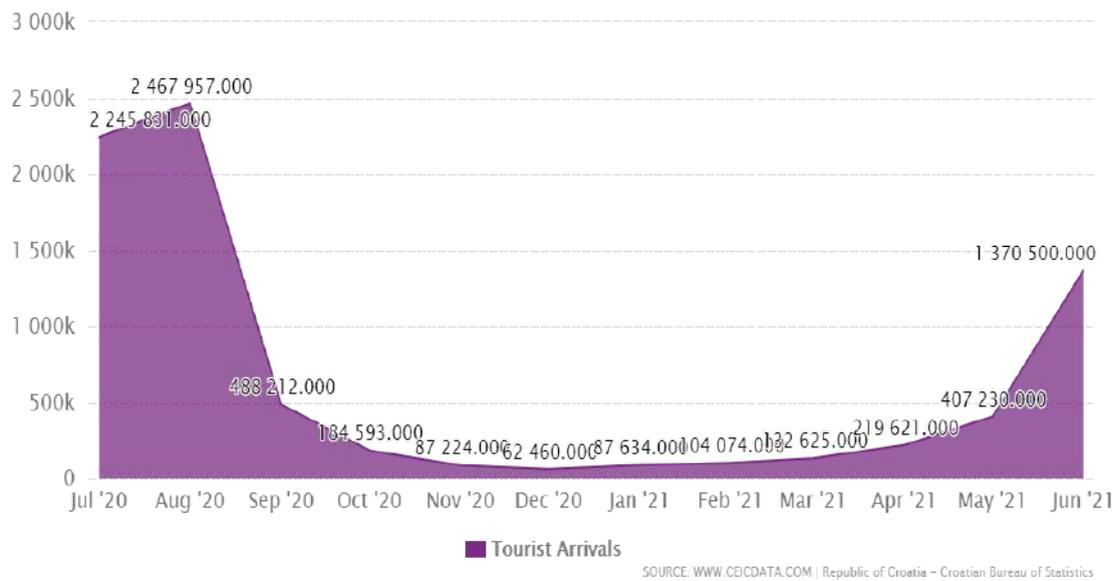
The number of foreign tourist arrivals in Spain increased 78.3% year-on-year to 4.4 million in July 2021, returning to pre-pandemic levels as the economy reopened and international travel resumed. Main increases were registered in arrivals from France, Germany and the UK. Considering the first seven months of 2021 however, tourist arrivals declined 25.8% compared to the same period of 2020 (Ramos, 2020).

The case of Cabo de Gata Nijar Natural Park in Andalucia is a good example of the pandemic effect on the industry. The Park was under growing pressure pre-COVID from increasing ‘sun, sea and sand’ tourism in the protected area. Collaboration between Park authorities and other institutions is considered a key factor. Working together is no new concept, but it may have been little discussed in the tourism sector before the pandemic. Over summer 2020 there was an explosion of visitors coming to the park in search of nature tourism, prompting park staff to take stock of how the world is changing around us. It became clear that long-term solutions are needed to deal with the stretching of Park resources, and this shift in tourist focus.” Collaboration Park authorities and other institutions are considered key. They are seeking to create dynamics that require time and care, but are willing to put in the effort because they can see the value and are committed to changing the way they do tourism. Tourism policy in Spain is moving the Spanish tourism model towards the principles of sustainability, innovation and knowledge. The broad aim is to develop a

smart and specialized high-quality product, fit for the digital age. Sustainable and inclusive tourism development demands a greater degree of innovation in the use of big data, digitalization and smart tourism destinations (OECD, 2020).

Recently, Spain has begun to prepare a new Strategy of Sustainable Tourism for 2030. The aim is to transform Spanish tourism towards a model of both sustained and sustainable growth to maintain the country's leading position in tourism, while protecting the assets on which the sector depends. The Strategy will contribute to the achievement of UN Sustainable Development Goals and meet both medium and long-term challenges of sustainable tourism in terms of socio-economic, environmental and territorial impacts (OECD, 2020).

Additionally, Croatia has always been an important tourist destination, as Inbound tourism is an important economic activity and a key source of export revenues for the country. Croatia features a typical "sun and sea" tourism model, with relatively long stays, concentrated in the coastal areas and over the summer months. Even though Mediterranean countries have a lot to offer in terms of historical and cultural heritage, most tourists visit them to enjoy a warm and the coastal natural attractions. It is geographically concentrated along the coast, which generates congestion costs and feeds regional imbalances. Moreover, nowhere in the EU does tourism show such a strong seasonal profile as in Croatia. The high seasonality of arrivals is challenging for local businesses operating in the tourism sector and limits its spill-over effect to other sectors. High seasonality is particularly problematic for infrastructures that tend to have high running costs irrespective of the utilization rate, such as large hotels. Average tourist expenditure in Croatia is significantly below that recorded in EU peers partly due to lower prices. The "sun and sea" model is typically associated with lower levels of consumption and a tourist infrastructure skewed towards the mid-low range. Excessive reliance on the current tourism model may be unsustainable (Orsini, 2018).



(Monthly / person / Republic of Croatia - CROATIAN BUREAU OF STATISTICS)

According to the Croatian Bureau of Statistics, the country experienced more than 50% losses on its tourist arrivals and accommodation during the end of 2020 and the first months of 2021 from October to April. The Croatian authorities are aware of challenges and opportunities, but differentiating away from the dominant sun and sea model is proving difficult. During the pandemic, a programme to stimulate domestic tourism where companies give their employees a 2,500 HRK (330 EUR) bonus in the form of a voucher, which is exempt from payroll taxes has been implemented. Participating tourism businesses, such as catering services, hotels or travel agencies are giving CRO Card holders an undefined discount for using the voucher. Important to note is that employers do not order the card, but employees independently choose the bank where they will open an account related to the card and may receive payments from their employer onto the card, as part of their salary, or charge money to it themselves (Croatian Bureau of Statistics, 2021).

Croatia's Institute for Tourism, and international NGO the Travel Foundation, have formed a partnership that will support the recovery and longer-term development of tourism in Southeast Europe as travel restrictions begin to ease. The partnership aim is to maximize the value that tourism brings to destination communities while minimizing its impact on the environment and natural resources. Together they will offer a programme of support for governments and businesses operating in Croatia and other countries in the region such as Albania, Slovenia, Bulgaria, Bosnia and

Herzegovina, and Montenegro. The partnership will support tourism recovery planning using science-based research on tourism's positive and negative impacts, and will build the capacity of destination management organizations, local development organizations and small businesses to recover with a smart and sustainable response to the COVID-19 crisis (Croatian Bureau of Statistics, 2021).

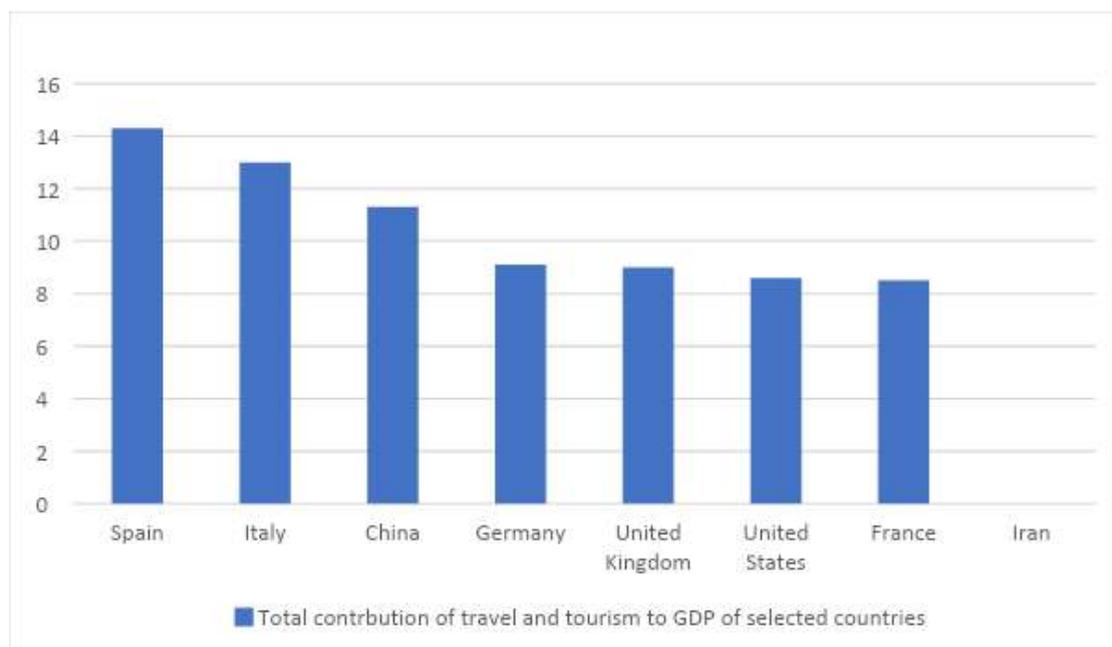
In Slovenia, permanent residents who are over the age of 18 will receive a voucher of 200 EUR that can be spent on accommodation, in some cases with breakfast included. In addition, Slovenia provides vouchers of 50 EUR for children under the age of 18. All vouchers will be valid from 19th of June until 31st of December 2020. They may be used by other family members, and are exempt from taxation and may be used in parts. The 'Green & Safe' Toolkit is part of Slovenia's commitment to responsible, green and safe tourism. The Slovenian Tourism Board has produced a Manual on Responsible Travel Standards in Slovenian Tourism, as part of its Green & Safe label scheme, which is designed to designate and highlight superior hygiene standards and protocols, and sustainable recommendations for tourist service providers and destinations in the country (Slovenian Tourist Board, 2020).

Released in July 2020, the Manual provides information on:

- Hygiene standards, measures and recommendations of the National Institute of Public Health that are applicable to the tourism industry in Slovenia
- Opportunities, capitalizing on the fact that Slovenia, is already well-established as a green, active destination that promotes tourism for health and wellbeing. It can provide this, at a time when tourists around the world are paying special attention to the choice of safer, customized and boutique tourist accommodations, programmes and experiences
- Communication tools based on the Green & Safe scheme, with 10 key areas of content that can be used by Slovenian tourism businesses in their communications (Slovenian Tourist Board, 2020).

The events that unfolded in Italy from the end of January can be analyzed using a chaos theory perspective. The key starting point was 21st February 2020, in which the first case of COVID-19 in an Italian citizen was identified. This event can be

considered the 'butterfly event' as, at this time, Italy was deemed to be a safe country, free from COVID-19. However, the number of cases and deaths rose dramatically in a few days. From an event that seemed quite limited, the country found itself facing huge consequences in a short timeframe. It can be said that, at this point, the country and the Italian tourism industry had reached the 'bifurcation' (Del Chiappa et al., 2021).



(Total contribution of travel and tourism to GDP of selected countries in 2019, STATISTA)

According to the statistics, Italy is ranked second in the list of most affected countries due to the covid-19 infection and in particular in the sector of tourism. Indeed, for the first time in the post WWII history of Italian tourism, the borders were closed, a growing number of airlines interrupted flights to Italy, and several foreign governments forbade trips to Italy. Others imposed quarantine to travelers who returned from Italy. From that time onwards, many businesses in the tourism sector found themselves trying to survive this unprecedented crisis, with industry associations (hoteliers, travel agents, etc.) requesting the intervention of the Italian government in order to support the businesses of their respective sectors. Moreover, due to the impact of the coronavirus pandemic, it was estimated that Italy recorded a decrease of approximately 67 million tourist arrivals in 2020 over the previous year.

As estimated, Veneto was the region experiencing the highest drop with a decrease of roughly 12 million arrivals. Lombardy registered the second-highest decrease, losing about 9.5 million tourist arrivals between January and December 2020 (Del Chiappa et al., 2021).

With regards to the actions that public sector organizations should put into place to support the hospitality industry, the most relevant actions that accommodation marketers think should be adopted by regional/national institutions. The results show that the most important actions are related to the need to receive financial help in the form of suspending or increasing their time to repay loans and mortgages and suspending payment of financing, with a significant portion of respondents considering these two actions as important or extremely important. With slightly lower levels of importance, respondents scored the need to obtain financial help to plan and implement accommodation and destination-based promotion activities to reassure national and international tourism of the safety of the tourism offer, to finance their expenses to offer guests Personal Protective Equipment, and to adopt Ozone-based technologies to sanitize hotel rooms and public spaces. In response to the crisis, Italy has also approved the suspension of tax payments, social security and welfare contributions for the tourism sector and extended the measure to cultural businesses (Del Chiappa et al., 2021).

In spite of the difficult situation, the travel industry is trying to adapt to the new reality employing modern tools of promoting tourism. Local authorities and labor market actors are using new technological approaches in order to facilitate their difficult position. In Italy, during the lockdown, there have been virtual tours and cooking classes by famous chefs, at a time where the real-life experience was impossible. Museums and heritage sites all around the world have held virtual exhibitions (Del Chiappa et al., 2021).

At the European Union level, the online platform Europeana has been launched to present to the public cultural artifacts. In the second quarter of 2020, the application Cultural Gems has launched an initiative encouraging proximity tourism. This allows people who, because of physical or financial access, could not enjoy these cultural exhibits in person to do so. However, this digitalization of touristic locations and

happenings may deepen inequality for remote places that are unconnected, and the ecological impact of entire museums going online, for example, is still unclear (European Commission, 2020).

Social media accounts and advertising campaigns consist of some of the measures that are being applied for the best marketing of the industry. Innovative tools, such as audiovisual material and the promotion of cultural spots from internationally recognized personas are put to use for the attraction of tourists. Digitalization and innovative solutions provide a unique opportunity to scale up operational procedures that make travel safe and seamless while mitigating the possible impact of new protocols in terms of increased waste generation, water and energy use. Electronic check-in at hotels, touchless border control and airline boarding can advance safety and security while minimizing waste (UN, 2020).

In particular, the ICAO Council established the Council Aviation Recovery Task Force (CART) to harmonize guidance on how to best help unify and align the numerous health and safety response and recovery approaches being implemented around the world. In an inclusive process, strategic priorities and policies to support states and the aviation industry for a safe, secure and restart and recovery of the aviation sector were identified. The “Take Off” guidelines outline 10 key principles for a harmonized approach to the restart and recovery of the aviation industry. The guidelines also include a set of globally-harmonized and mutually-accepted risk mitigation measures related to aviation safety, aviation public health, facilitation and aviation security, as well as economic and financial measures (Uniting Aviation, 2021).

These guidelines are being operationalized through an implementation package, including guidance material, training (including standardized and competency-based trainings, in classroom, online or virtual formats), tools (including data-driven applications, online reporting systems, electronic management systems or questionnaire/surveys), expert support (including the provision of experts to support states in their activities;) and, when applicable, procurement guidance (Uniting Aviation, 2021).

In some countries, special conditions regarding the loan state have also been introduced. For instance, the Central Bank of Egypt offered tourism facilities low-interest funds, particularly for paying employee salaries and launched a financing initiative supporting tourism (Salem et al., 2021). In addition to reducing the interest rate, banks can grant credit facilities with a maximum two-year repayment period, as well as a six-months grace period starting from the grant date. Lebanon allowed economic institutions to lend money without interest for five years to help them pay salaries (Association of Banks in Lebanon, 2021) and Montenegro announced that grants for salaries for April and May will be given to entrepreneurs and tourism SMEs; upon request, tourism companies will receive subsidies for the payment of salaries (UNWTO, 2020).

There has also been the postponement of dues, such as taxes, rents or insurance payments. Egypt postponed the payment of all dues on tourism and hotel establishments and declared all bazaars and cafeterias located in archeological sites exempted from paying rent until tourism safely resumes (UNWTO, 2020).

Similar flexibility in terms of social security contributions was implemented where the contribution of payment liabilities of employers in their entirety has been cancelled and where the state would take over 70 per cent of lost wages for three months in support of part-time workers. For the Southern Mediterranean, in Morocco, the government also contributed to protecting unemployed people and deferred social contribution payments for a number of sectors, including tourism. In addition, the Tourism ministry launched a label guaranteeing the respect of health safety protocols in tourism accommodation establishments, "Welcome Safely", in order to restore customer's confidence in the destination (Ministry of Tourism Handicrafts Air Transport and Social Economy, 2020)

The local authorities have also implemented innovative manners in order to promote and support this specific sector. In the city of Essaouira (Morocco), a digital communication campaign and its attached mobile application promoted the cultural and historical landmarks. In Marrakech, adjustment of lodging prices aimed at attracting domestic tourists. However, this digitalization of touristic locations can increase and deepen inequality for remote places that are unconnected or can at the

contrary stimulate travel flows putting in danger fragile environmental or cultural sites (Fosse et al., 2021).

Moreover, in Tunisia, where international travel hit an 80% decline in the first semester of 2020 compared to the year prior, a policy of deferral of payments for the operators of the tourism sector suffering from the pandemic was enabled. In general, Tunisia has benefited from a strong prioritization of tourism, with high government spending on the sector, effective destination-marketing campaigns, and attendance at several major international tourism fairs (Fosse et al., 2021).

Implementing and communicating adequate health and safety protocols at all points of the travel journey will be key to rebuilding confidence while ensuring the safety and security of travelers, workers and host communities. Full coordination with health authorities and international cooperation on consumer protection policies and travel restrictions are essential to promote safe travel, build confidence and accelerate recovery as tourism restarts. Collaboration and cooperation between countries will be essential in this regard. The lifting or imposing of travel restrictions should be fully coordinated among countries to ensure the safe restart of tourism. In preparation, a series of guidelines were developed, including general guidelines for tourism activities and specific guidelines for national parks (UN, 2020).

The UNWTO Global Tourism Crisis Committee, as the UN specialized agency for tourism, has united and led the tourism sector to formulate a sector-wide response to the unprecedented challenge of the COVID-19 pandemic. The Committee comprises representatives of Member States and the private sector, alongside WHO, ICAO, ILO, IMO, WBG, OECD, ACI, CLIA, IATA and WTTC. The Committee, which was created in March, released the first set of global recommendations to support jobs and economies through tourism. In May 2020, the Committee endorsed UNWTO's Global Guidelines to Restart Tourism, an action plan focused on the Priorities for Tourism Recovery, supporting both public and private sectors to:

1. Provide liquidity and protect jobs.
2. Recover confidence through safety and security.

3. Public-private collaboration for an efficient reopening.
4. Open borders with responsibility.
5. Harmonize and coordinate protocols and procedures.
6. Added value jobs through new technologies.
7. Innovation and Sustainability as the new normal (UNWTO, 2020).

Subsequently, as travel restarts in some parts of the world, limited connectivity and weak consumer confidence, the unknown evolution of the pandemic and the impact of the economic downturn present unprecedented challenges to the tourism sector. Supporting the millions of livelihoods that depend upon a sector affected by months of inactivity, and building a sustainable and responsible travel experience that is safe for host communities, workers and travelers are key to accelerating recovery. Many authors have suggested serious links between the changes that man causes in the environment and the emergence of infectious diseases (UN, 2020).

It is necessary to take these links into account in sustainable development planning both in tourism and in general, economic and social. It is time to rethink how the sector impacts our natural resources and ecosystems, building on existing work on sustainable tourism; to examine how it interacts with our societies and other economic sectors; to measure and manage it better; to ensure a fair distribution of its benefits and to advance the transition towards a carbon neutral and resilient tourism economy. A collective and coordinated response by all stakeholders can stimulate the transformation of tourism, together with economic recovery packages, and investments in the green economy (UN, 2020).

Obviously, the tourism sector as it stood pre-pandemic was highly unsustainable. Transport, including international travels, was the biggest emitting sector across the European Union, ranging between 15 to 40% of countries' carbon emissions, with total transport emissions accounting for about 30% of all EU emissions. Maritime transportation represents nearly 4% of this number. At a global scale, carbon emissions from tourism are estimated roughly at 8% of total carbon emissions, mainly due to air transport, growing year after year. The tourism industry needs to

move beyond previous models based on the pre-pandemic and move towards models that consider social responsibility and the sustainability of tourism (European Environment Agency, 2021).

The present crisis has shown the importance of reshaping the global immobility tourism political economy addressing the systemic forces of accumulation, constellations of class power and models of innovation that will continue to radically restructure complex, multi-scalar modes of industrial organization and profit extraction in contemporary tourism. The climate emergency debate has been the prelude of the outbreak of the social movements claims and the pandemic crisis induced global no-tourism, forced deceleration and physical immobility (Milano & Koens, 2021).

Recovery paths across the region include further development of the Mediterranean as a single tourism brand, for instance by fostering innovation for fully sustainable, safe and accessible tourist destinations, greater ability to develop green tourism infrastructures, reducing seasonality effects due to mass tourism, and an uptake of digitalization to ensure the diversification of touristic markets, products and services. The COVID-19 crisis has raised awareness of the importance of local supply chains and the need to rethink how goods and services are produced and consumed, both key elements of a circular economy. Integrating circularity and further advancing resource efficiency in the tourism value chain represent an opportunity for the tourism sector to embrace a sustainable and resilient growth pathway (UFM, 2021).

Two major trends are increasingly impacting the tourism sector, the digitalization and the emergence of alternative tourism models. National, regional and local governments should maximize the use of big data and technology to better plan, measure and manage tourism and promote evidence-based policies for tourism in rural areas in cooperation with the private sector and technology providers. Such systems should consider the monitoring of indicators on infrastructure, carrying capacity, health and safety, housing, social impact, transport and mobility, management of natural and cultural resources and community engagement. Big data should be strategically used to better understand visitors to rural areas, their travel behaviors and patterns. This information can be used to craft marketable and

personalized experiences, monitor impacts and boost rural areas competitiveness and sustainability (OECD, 2020).

Alternative tourism models

Regarding alternative tourism suggestions, it should promote contact with nature and culture in uncrowded environments. It is essential, in this area, to take into account also the guidelines set by the Green Deal and promote sustainable tourism instead of mass tourism, looking for a balance between the preservation of tourist ecosystems and economic realities. The full variety of rural resources should be considered. This includes tourism activities related to culture, gastronomy and beverage, health and wellness, adventure and sports, agro-tourism and ecotourism, mountain, coastal, marine and natural protected areas, but also the promotion of post-visit follow-ups and access to rural produce. Focus on product development with an emphasis on interpretation which provides experiences for visitors, in terms of cultural learning and environmental conservation in rural areas, should be given priority. Moreover, supporting the integration of circular economy processes in tourism is an opportunity, which can promote innovation, the creation of new sustainable business models and green jobs added value for customers and local economic development (Manniche et al., 2021).

Governments are already developing steps to strengthen their tourism economies in the aftermath of COVID-19 through strategies meant to help tourism's sustainable recovery, encouraging the digital transformation and the transition to a greener tourism framework, and reimagining tourism for the future. Analyzing recovery measures adopted by European governments indicates that authorities are relatively aware of an imperative need to strengthen tourists' sense of security, satisfy the increased need for information, and stimulate confidence (OECD, 2020).

Adopted solutions comprise new service and information concepts; guidelines for the accommodation places; a four-tier system (green, orange, red, and gray countries) determining different risks and entry requirements (Cyprus); digital

coronavirus passports; national digital and social network campaigns (France, Spain); interactive maps to locate all tour operators who are open and dedicated to health protocols (France); apps for smart devices supporting digital transition and providing tailor-made information and innovative services (Greece); COVID-19 helpline specifically for tourists (Malta); “Clean/Green and Safe” seal for tourist activities that comply with hygiene and cleanliness requirements for the prevention of COVID-19 (Portugal, Slovenia, Spain); travel insurance for foreign tourists (Portugal); campaigns to promote more responsible and sustainable tourism (Portugal); Egypt’s Sustainable Tourism Strategy 2020 seeks to address these challenges and create a suitable environment to raise competitiveness and support inclusive growth (Orindaru et al., 2021).

Policy tools are essential to ensure long standing sustainable management of tourism. Though, their success in achieving sustainable tourism will greatly depend on the political will of the relevant authorities, access to finance, engagement of all stakeholders, as well as the availability and quality of data required to develop sound long-term management strategies. A few different policy tools that national and local governments can use to facilitate sustainable tourism are the implementation of green taxes, tourist tax, carrying capacity, ecological footprint, life cycle assessment and sustainable tourism indicators (UNEP, 2005).

This crisis offers an unprecedented opportunity to transform the relationship between the tourism sector and nature and so contribute more fully to the Sustainable Development Goals and the Paris Agreement on Climate Change. Enhancing sustainable regional tourism development provides considerable benefits from making tourism-dependent regions less vulnerable to economic threats, to using resources more sustainably, creating green jobs and enhancing transport connectivity. Tourism should shift towards a resilient, resource efficient and carbon neutral sector, building on existing models (UN, 2020).

Destinations, tour operators and travel agencies, on their part, are starting to reduce the dependency on over-crowded locations and promote environmentally friendly journeys, in order to manage travel flows and generate value in less-travelled areas. They should engage local communities and SMES in the planning process, develop

sustainable products focused on biodiversity or culture. The tools of storytelling permitted by the progress of digitalization allows for personalized, valuable experiences that shun mass tourism and favor the protection of the environment travelled to (eco-union, 2021).

Digitalization and new technologies

The advent of COVID-19 has accelerated all processes aimed at reducing contact and making communication, transport, and policies more efficient. Contactless technologies, biometrics and Artificial Intelligence are all part of this trend. Technologies such as Artificial Intelligence and automation can assist rural travelers with specific access requirements, whilst virtual and augmented reality can be used by rural destinations to help persons with limited mobility, hearing or vision impairments to travel around the world. In tandem, prior and informed consent to such data, public governance and open access to big data should be put in place to ensure that the technology and data will benefit both the communities and consumers (UN, 2021).

Recovery of tourism destinations and companies will be fully dependent on their capacity to take advantage of technology to better understand and monitor travelers' needs and trends, create and market innovative experiences, use digital platforms to enhance the competitiveness and agility of MSMEs to reach customers, provide added-value jobs, and implement effective health protocols. Artificial intelligence and big data can help manage flows and protect communities and resources (UN, 2020).

Epidemiological indicators should also be in the process of being connected with tourism monitoring mechanisms. Strengthening monitoring mechanisms in this direction has potential to lead the way for tourism to recover as an economic activity, ensuring that the easing of travel restrictions or introduction of new measures and policies is based on evidence. If well planned and managed, tourism can make a responsible contribution to the health and wellbeing of those working in the sector and local people (UN, 2021).

Local communities and individual stakeholders should receive adequate training that allows them to access, evaluate, and implement individual decisions using big data. In addition, digitalization, as well as reskilling and up-skilling tourism workers will destroy but should also create jobs. Investing in the human capital locally is the best way to sustain a balance between quality tourism and biodiversity protection. It must be guaranteed that no workers or communities are left behind in the tourism transition. To remedy that, public authorities should invest in digital competences (World Economic Forum, 2020).

Although these policies and initiatives are valuable and contribute, in one way or another, to the sustainable tourism in the Mediterranean, they are in general lacking a structured and robust governance system at regional level that could ensure the necessary social and environmental transformation of the tourism sector. The European Commission (EC) has recognized that competitiveness of tourism is closely linked to its sustainability, as the quality of destinations is strongly influenced by their natural and cultural environment and their integration into the local community. Tourism is a globalized yet fragmented industry that needs to be monitored, managed and regulated at various space, time and geographic scales (Fosse et al., 2021).

Domestic Tourism in response to the economic impact of the pandemic

In addition to that, air ticket data for international travel to, and domestic travel within the three markets show that domestic travel is recovering faster from the COVID-19 crisis than international travel. Domestic tourism is providing a much-needed boost to help sustain many tourism destinations and businesses, and will continue to be a key driver of recovery in the short to medium term. The data indicates smaller year-on-year drops in domestic ticket sales than international tickets in all three markets. In France, domestic air travel dropped 54%, compared to 63% in international travel to that destination (OECD, 2020).

The promotion of domestic tourism is, in many cases, the first step to restart tourism; and in most of the countries this is expected to be followed by initiatives intended to attract international tourists, at a first stage, from the same region. Many governments around the world are developing and implementing several initiatives targeted at promoting domestic travel and restoring confidence in the tourism sector (UNWTO, 2020).

Two different types of initiatives stand out from the analysis and are the most adopted across countries, firstly financial incentives and secondly marketing and promotion. Incentives can take the form of vouchers, fiscal incentives or long weekends, whereas the launch of new communication campaigns and digital promotion efforts with a strong use of social media channels are popular strategies of marketing and promotion taken by most destinations (UNWTO, 2020).

Other common types of initiatives implemented by countries are public-public partnerships at different levels, as well as public-private collaboration in marketing and promotion efforts such as communication campaigns, online platforms, tourism fairs and discounts. In many countries, tourism authorities have partnered with other concerned national authorities (Ministry of Transport, Ministry of Finance, Ministry of Culture, etc.) to, for example, offer holiday vouchers and other incentives (UNWTO, 2020).

Italy approved a Holiday Bonus (Bonus Vacanze) for families under certain conditions that would allow them to travel within the country and reactivate demand. The French Government has launched the campaign #CetÉtéJeVisiteLaFrance 18 (This Summer, I visit France) highlighting the diversity of destinations across the country and encouraging its citizens to rediscover their own culture, heritage and gastronomy. For the first time ever, Spain has launched a domestic tourism campaign with the #DescubreLoIncreible (Discover the Unbelievable) being promoted in social media (UNWTO, 2020).

In June, a domestic tourism campaign #TuPodes (#YouCan) by Turismo de Portugal was announced, inspiring the Portuguese travelers to visit the places that have made Portugal the world's best destination three years in a row. The campaign will be

carried out in three phases. The first phase consisted in the launch of the new video #TuPodes with the second phase focused on the testimonies of tourism workers and the third phase on a digital platform, which will support the national campaign, but also the regional campaigns, compiling countless tourist experiences across the country. The visibility that will be given to the services of these companies will also boost the business fabric of the regions and support the marketing effort of these companies through offers specifically aimed at the national tourist who is not their usual customer (UNWTO, 2020).

In Gaza Strip, local tourism companies are also focusing on domestic tourism in light of obstacles hindering foreign tourism, while religious tourism has nearly ground to a halt because of the coronavirus pandemic. To keep this vital sector alive, the Palestinian Ministry of Tourism in Gaza is working to encourage domestic tourism. It focused in particular on archaeological sites that are widely spread in the Gaza Strip. It launched a campaign to encourage citizens to take part in domestic tours and raise awareness of the national archaeological treasures. Local tourism in Gaza is one of the key economic sectors that drew the concerned authorities' attention. The sector has potential to employ a significant portion of Palestinian manpower and curb the soaring unemployment rate. It became all the more important amid the disappearance of incoming tourism in light of the strict Israeli siege imposed on the enclave, the closure of the crossings that connect it to the outside world, and the security and political tensions in the region. The revival of domestic tourism is not limited to visiting archaeological sites, but extends to recreational events. Tourist attractions consist of a large group of rest houses and seaside resorts stretching along the coastline from Beit Lahia in the north to Rafah in the south (Al Gherbawi, 2021).

Establishing bilateral travel bubbles is another interesting option to revive tourism. The growing number of travel agreements is a testament to this. Economies that are highly dependent on tourism from one source country would particularly benefit from a bilateral travel bubble. Agreements are however subject to rapidly changing epidemiological circumstances. Existing agreements are based on a mix of economic, social, and health considerations. If potential bilateral pairings are analyzed

according to pandemic preparedness and whether they appear to be past their peak of outbreaks, very few bilateral pairings were attractive. Subregional or multilateral travel bubbles are also under discussion and may be considered as a next step to multiple bilateral agreements. Subregional travel bubbles are however only a better solution to bilateral bubbles when there is a large degree of intra-sub regional travel. One of the most important policy implications for subregional bubbles is the establishment of harmonized protocols for travel and tourism (Helble & Fink, 2020).

Medical Tourism

In line with the continuous expansion of world tourism, an increasing number of people are travelling for health purposes (UNTWO & European Travel Commission, 2018). Flows have been facilitated by affordable, accessible travel and readily available information over the Internet. Medical and health tourism today makes up about 5 percent of the tourism industry in the EU28 and contributes to about 0.3 percent of the EU economy. In Turkey for example, which has become a premier and popular destination for medical tourists looking for less complicated treatments, the government offers discounts for patients flying with Turkish Airlines. The government is also planning to introduce tax-free healthcare zones for foreign patients (Tsvetkov, 2018). More and more governments and companies are offering cheap flights, open borders, and inclusive packages to further fuel this segment of the tourism market.

The Covid-19 pandemic has also introduced a new branch of medical tourism, known as vaccine tourism. This involves tourists who choose to pay a significant sum to travel to a destination that has an abundance of Covid-19 vaccines so they can combine vaccination and tourism as their purposes of travel. Some travel packages even include vaccination as a key component of the travel experience (Global Data, 2021). In fact, one can expect interest in wellness tourism to grow, more so as a response to the general sense of isolation, and loss of social interaction, experienced by so many millions worldwide. Early indicators of such increase in demand should follow, and within the constraints of travel. One major challenge to medical tourism

for the immediate future is travel by the elderly and other vulnerable individuals, for whom travel restrictions may be more stringent (Oguz et al., 2020).

Furthermore, the global medical tourism market is expected to grow from \$19.79 billion in 2020 to \$21.93 billion in 2021 at a compound annual growth rate (CAGR) of 10.8%. The growth is mainly due to the companies resuming their operations and adapting to the new normal while recovering from the COVID-19 impact, which had earlier led to restrictive containment measures involving social distancing, remote working, and the closure of commercial activities that resulted in operational challenges. High healthcare costs in developed countries are driving growth in the medical tourism market as developing countries are able to provide cheaper treatment. Patients usually travel to developing countries with quality healthcare infrastructure and low healthcare costs (Medical Tourism Global Market Report, 2021)

The involvement of the private sector, financial actors, academic world and civil society organizations is critical to implement significant change and take advantage of the recovery and resilience plans. All of these measures should be multifold, involving various actors and benefitting in many ways the environmental, social and economic environment (Fosse et al., 2021).

Many countries are developing new tourism products, investing in clinics that offer specialized nursing and support services to elderly patients, and offer complete health & leisure packages. Various initiatives from governments, local municipalities and the private sector across European countries are moving in that direction. In Spain, for instance, the European Senior Tourism (EST) program attracts senior citizens from other EU countries during low season at competitive prices. The IMSERSO program subsidizes the improvement of tourist facilities so they can accommodate senior citizens or citizens with disabilities, while also funding programs for social tourism for seniors (Georgakopoulos, 2019).

Sustainability and responsibility have become key criteria also in health tourism, which often relies on natural resources and assets. When managing health tourism, it is certainly important to have a sustainable approach in terms of development,

planning and impact management. It is also critical to observe regulations and ethics. The incorporation of sustainable practices and corporate social responsibility, the inclusion of local communities, the Sustainable Development Goals as guiding framework for both public and private stakeholders, are key fundamentals for the long-term viability of the health tourism related industry and maximizing benefits for local communities. Destinations should look at the impact of health tourism on the quality of life of residents. The wellbeing of local residents is equally important as the health improvement of tourists. Monitoring economic, social and environmental impacts need dedicated attention and resources (UNWTO & European Travel Commission, 2018).

V. Analysis and Needs

The crisis is a call for governments at all levels to take strong and coordinated policy action to mitigate the impacts and support the recovery of the industry. It is also an opportunity to take advantage of new technologies, implement green recovery strategies, and shift to policy and business practices that better balance the environmental, social and economic impacts of tourism. Policy makers should leverage the opportunity to reboot the tourism economy on a stronger, fairer and more sustainable footing. The crisis, and the recovery plans that are being put in place, are a once in a lifetime opportunity to move towards more sustainable and resilient models of tourism development.

Policy makers will need to learn from the crisis to build a stronger, more resilient tourism economy for the future. Delivering well-targeted and accessible supports as quickly and efficiently as possible to vulnerable tourism businesses, workers and tourists has and continues to be crucial. Governments at all levels, and the private sector, need to be better prepared and have the capacity to react and adapt quickly. This requires more robust risk assessment and crisis response mechanisms, and closer coordination – at local, national and international level.

Countries need to work together, as the actions taken by one government have implications for travelers and businesses in other countries, and for the global tourism system. They need to develop collaborative systems across borders to safely resume travel, restore traveler and business confidence, stimulate demand and accelerate tourism recovery.

In addition to that, destinations and tourism businesses need help to be ready to provide tourism services to meet demand when the recovery comes. It will be important to work with tourism businesses so they are sustainable beyond the end of the support, and already starting to address the long-term implications of the crisis. Measures should be increasingly conditioned on broader environmental, economic and social objectives.

The crisis has highlighted shortcomings in the availability of timely, comparable data in quickly evolving situations. Reliable and consistent indicators are needed to evaluate the effectiveness of programmes and initiatives, and monitor progress on tourism recovery and resilience. Risk-based solutions to safely lift travel restrictions and get the international tourism ecosystem back up and running must be based on sound scientific evidence.

The pandemic has once again exposed structural shortcomings in the tourism system and the vulnerability to external shocks. There is an urgent need to diversify and strengthen the resilience of the tourism economy, to better prepare for future shocks, to address long standing structural weaknesses, and encourage the digital, low carbon transformations that will be essential to shift to stronger, fairer and more sustainable models of tourism development.

VI. Conclusions and Recommendations

The COVID-19 caused significant damage to all countries that had aligned their economies with tourism. All involved parties were damaged, resulting in a societal impact except from the obvious economic one. The covering of the losses does not seem to have a strategy built from the international actors and countries, taking into consideration that for the time being, the pandemic still is a major reality and not an issue of the past.

In a wider spectrum, the pandemic had an impact on all individuals in every country that was hardly or partially hit. Based on the UNWTO report (2020), the restrictions of all travels resulted in the worst impact on tourism revenues. The worldwide economic results to the tourism sector due to the lack of sufficient and accurate data are still hard to define and provide answers to what extent the tourism sector has been hit.

The same report argues that the gross income of citizens and the general employment level impacts expected revenues for the tourism sector. The countries with significant dependence on tourism revenues are expected to have a loss of employment in the workers with limited skills more than 10% in the best case scenario and 40% in the worst case scenario (UNWTO, 2020).

However, almost all sectors of the economies reliant on tourism are negatively affected due to the intersectoral linkages. Some labour and capital may be employed in other sectors though most capital is not easily transferable, and it will be difficult for many workers to find employment in other sectors in declining economies. What GTAP does not capture is the adjustment cost of moving out of one industry and back again when it recovers. Tourism is likely to recover more slowly than other industries, perhaps as long as 19 months, based on previous pandemics, according to the WTTC (2020).

The sustainability and the social impact of the touring economic cycle are crucial. All states are starting to provide enormous financial rescue packages to tourism and

that brings into light the opportunity for the model shifting momentum. In particular, the progressive phasing out of fossil fuel energy in the travel and tourism sector is needed to match the 2050 climate neutrality target. Quickly substituting carbon intensive air travels by electric mobility (cars, buses or trains) is essential, while low-carbon technology is developed for airplanes (Scott & Gosling, 2018).

In order to achieve the needed change to the framework of tourism all decision making actors should be active in a cross sectoral approach to deliver the needed shift in the tourism and social era. This includes the engagement of the professionals of the tourism, markets and finance institutions, public authorities and the third sector as a knowledge broker between the civil society and the upper tiers of governance.

Private sector individuals, businesses and governments are faced with the decision to move to another sector, which involves retraining and some capital investment, or waiting it out until the tourism industry recovers. What can countries do to mitigate the devastating effects of lack of international tourism during and after the COVID-19 pandemic? In the short term, protecting people and maintaining a healthy tourism industry are important. Appropriate social protection can often prevent the worst effects of any type of shock, including the COVID-19 pandemic (UNCTD, 2020).

Casual and self-employed workers are common in tourism related sectors and should be helped where possible. Governments should protect workers. Where some enterprises are unlikely to recover, wage subsidies should be designed to help workers move to new industries. Governments can further assist tourism enterprises that may otherwise go bankrupt, such as hotels and airlines. One approach for financial relief is low interest loans or grants. Although support is needed urgently, this requires a thorough analysis of the costs and benefits of support to specific sectors. The data have shown, the economic effects are not only directly in the tourism sector but spread across many sectors. Most governments have limited means to support or underwrite a major industry.

Some programmes such as the Catastrophe Containment and Relief Trust by the International Monetary Fund (IMF) can offer short term debt reliefs to some of its

members. The key issue is whether the industry will bounce back once restrictions are removed. This is an unprecedented shock and requires urgent action to prevent wiping out entire sectors that are likely to recover in the hopefully not so distant future. The international community should support access to funding for the most heavily affected countries.

A key issue for tourists is the need for post-pandemic quarantine on arrival. The need for arrivals to self isolate for two weeks would be a major barrier to travel. Several countries have lifted this requirement already. This needs a careful and coordinated approach between source and destination countries. A common set of rules related to departure and arrival procedures and sanitation requirements for air travel would be highly beneficial. In the medium and longer term, governments should support economic diversification where possible (UNCTD, 2020).

A high dependence on one sector increases vulnerability. For some countries diversification away from tourism may be difficult. Avenues for economic diversification may include increased regional integration, education and training programmes in targeted economic sectors to boost resilience and mitigate the cost of shocks.

A major finding from the analysis is that the GDP effects are much greater than the loss of tourist expenditure because of the indirect effects through the supply chain. Is the modelling under or overstating the effects? In the short run, the effects are probably understated because it is assumed that capital and labour can be employed in sectors other than tourism. This is unlikely to be the case because tourism is not the only sector negatively affected. Therefore, there are limited opportunities for re-employment of displaced workers and capital. In the long run, the WTTC anticipates that the international tourism sector will likely return to pre-pandemic levels within a 19-month period.

Depending on the duration of the pandemic and the measures to contain it, the model presents the effects in three time periods – from a 33 per cent to 100 percent reduction in annual tourism spending. As the world slowly reopens its economies for tourism, it remains to be seen which scenario will be the most applicable. The

damage incurred in the tourism sector goes beyond cancelled flights and hotel bookings.

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