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https://doi.org/10.46361/2449-2604.10.1.2023.96-103

IMPACT OF THE COVID-19 PANDEMIC ON INTERNATIONAL TOURISM

The coronavirus pandemic had a devastating impact on the tourism industry worldwide. It has severely impacted world economic development and disrupted social stability. In the background of the COVID-19, the development of tourism industry also faced critical opportunities and challenges.
This paper details the situation with the tourism industry on the international stage and analysis The UNWTO report and the position of the UN. Consumer behavior trends in the tourism industry are identified in connection with the impact of the pandemic, as well as the impact of the pandemic on the economy of tourism-dependent countries. The spread of vaccination and the adoption of adequate safety measures directly influenced the recovery of tourism. In case of the economy and employment, reopening of this sector has a significant multiplier effect on it, which could be critical in dealing with the crisis caused by the pandemic. This paper discusses an ILO analysis that highlights the need to develop policies that promote a recovery of employment, decent jobs and sustainable businesses in the tourism sector; Outlines the directions of tourism promotion and recovery programs, which usually focus on restoring tourist sites to make them more sustainable; The thesis of "digital nomads" is conditioned, who are looking for an opportunity to work and analyze the changes in the market of tourist routes on specific examples. The paper also lefts a forecast for the close future and the possibility of recovering the industry after a crisis with stipulated ways to solve problems in different countries.

Keywords: *Tourism, COVID-19 pandemic, international tourism, tourism industry, sustainable tourism, UNWTO.*

JEL classification: *Z30, Z31, Z32.*

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COVID-19 პანდემიის გავლენა საერთაშორისო ტურიზმზე

კორონავირუსის პანდემიამ დამანგრეველი გავლენა იქონია ტურიზმის ინდუსტრიაზე მთელს მსოფლიოში, რამაც სერიოზულად იმოქმედა მსოფლიო ეკონომიკურ განვითარებაზე და დაარღვია სოციალური სტაბილურობა. COVID-19-ის ფონზე ტურიზმის ინდუსტრიის განვითარება ასევე კრიტიკული გამოწვევების წინაშე აღმოჩნდა.

ნაშრომში დეტალურად არის აღწერილი ტურიზმის ინდუსტრიის მდგომარეობა საერთაშორისო ასპარეზზე და გაანალიზებულია UNWTO-ს მოხსენება და გაეროს პოზიცია. ტურიზმის ინდუსტრიაში მომხმარებელთა ქცევის ტენდენციები გამოვლენილია როგორც პანდემიის ზემოქმედების კუთხით, ასევე ტურიზმზე დამოკიდებული ქვეყნების ეკონომიკაზე პანდემიის გავლენის შედეგებიდან გამომდინარე. ვაქცინაციის გავრცელებამ და ადეკვატური უსაფრთხოების ზომების მიღებამ პირდაპირ გავლენა მოახდინა ტურიზმის აღდგენაზე. ეკონომიკისა და დასაქმების შემთხვევაში, ამ სექტორის ხელახალი გახსნა მასზე მნიშვნელოვან მულტიპლიკატორულ გავლენას ახდენს, რაც შესაძლოა გადამწყვეტი იყოს პანდემიით გამოწვეულ კრიზისთან გამკლავებაში. ეს ნაშრომი განიხილავს შსო-ს ანალიზს, რომელიც ხაზს უსვამს ისეთი პოლიტიკის შემუშავების აუცილებლობას, რომელიც ხელს შეუწყობს დასაქმების აღდგენას, სამუშაო ადგილების შექმნას და მდგრადი ბიზნესის განვითრებას ტურიზმის სექტორში; ასახავს ტურიზმის ხელშეწყობისა და აღდგენის პროგრამების მიმართულებებს, რომლებიც, როგორც წესი, ორიენტირებულია ტურისტული ადგილების აღდგენაზე; განხილულია „ციფრული მომთაბარეების“ თეზისი, რომლებიც ეძებენ შესაძლებლობას იმუშაონ და კონკრეტულ მაგალითებზე გააანალიზონ ცვლილებები ტურისტული მარშრუტების ბაზარზე. ნაშრომში წარმოდგენილია ახლო მომავლის პროგნოზი და ინდუსტრიის აღდგენის შესაძლებლობები სხვადასხვა ქვეყანაში პრობლემების გადაჭრის გათვალისწინებული გზებით.

საკვანძო სიტყვები: *ტურიზმი, COVID-19 პანდემია, საერთაშორისო ტურიზმი, ტურისტული ინდუსტრია, მდგრადი ტურიზმი, UNWTO.*

JEL კლასიფიკაცია: *Z30, Z31, Z32.*

Introduction and review of literature

As the world faces an unprecedented global health, social and economic emergency due to the COVID-19 pandemic, travel and tourism were among the hardest hit sectors as planes flew less often, hotels were closed and travel restrictions were in place in almost every country. The tourism industry suffered a huge blow in 2020 as a result of lockdowns and travel restrictions aimed at curbing the spread of COVID-19, which made people around the world limit their activity and lose their livelihoods [10].

Madrid-based UNWTO said in a report, though the spread of the Omicron variant in December triggered another dip in both travel bookings and industry optimism. "The pace of recovery remains slow and uneven across world regions due to varying degrees of mobility restrictions, vaccination rates and traveler confidence," the report said. Southern Mediterranean Europe, Central America and the Caribbean saw the biggest increases in tourist arrivals compared with 2020, but were still respectively 54%, 56% and 37% below the 2019 numbers. Meanwhile the number of tourists in the Middle East and the Asia Pacific kept falling in 2021, tumbling to 79% and 94% below pre-pandemic levels respectively as many destinations remained closed to non-essential travel [10].

The leisure industry is one of the main components of the global service industry [3]. Travel and tourism provide a substantial contribution to business operations and ultimately contribute to the worldwide economy. The travel and tourism sector is an economic driver to the destination country's local GPD [11].

Methodology

To analyze statistical data, the quantitative and qualitative methods were used. We considered the available information on tourism industry during COVID-19 pandemic, tourism industry on the international stage and analysis of reports World Tourism Organization.

Another methods used to achieve the aims of the study are comparative and analytical methods of research. Materials of the studies consists of analysis of documentations texts, scientific articles and publications, as well practical experience gained in the topic of the research

The Crisis of Tourism Dependent Economies

Countries that rely heavily on tourism, and in particular international travelers, tend to be small, have GDP per capita in the middle-income and high-income range, and are preponderately net debtors. Many are small island economies—Jamaica and St. Lucia in the Caribbean, Cyprus and Malta in the Mediterranean, the Maldives and Seychelles in the Indian Ocean, or Fiji and Samoa in the Pacific. Prior to the COVID pandemic, median annual net revenues from international tourism (spending by foreign tourists in the country minus tourism spending by domestic residents overseas) in these island economies were about one quarter of GDP, with peaks around 50 percent of GDP, such as Aruba and the Maldives. But there are larger economies heavily reliant on international tourism. For instance, in Croatia average net international tourism revenues from 2015-2019 exceeded 15 percent of GDP, 8 percent in the Dominican Republic and Thailand, 7 percent in Greece, and 5 percent in Portugal. The most extreme example is Macao, where net revenues from international travel and tourism were around 68 percent of GDP during 2015-19. Even in dollar terms, Macao's net revenues from tourism were the fourth highest in the world, after the U.S., Spain, and Thailand. In contrast, for countries that are net importers of travel and tourism services—that is, countries whose residents travel widely abroad relative to foreign travelers visiting the country—the importance of such spending is generally much smaller as a share of GDP. In absolute terms, the largest importer of travel services is China (over $200 billion, or 1.7 percent of GDP on average during 2015-19), followed by Germany and Russia. The GDP impact for these economies of a sharp reduction in tourism outlays overseas is hence relatively contained, but it can have very large implications on the smaller economies their tourists travel to—a prime example being Macao for Chinese travelers [2].

But there are larger economies heavily dependent on international tourism. For example, how have tourism-dependent countries coped with the disappearance of a large part of their international income in 2020? They have been forced to borrow more from abroad (technically, their current account deficits have widened or their surpluses have narrowed), but have also reduced net international spending in other categories. Merchandise imports declined (reflecting both reduced domestic demand and reduced tourism inputs such as food and energy imports), and payments to foreign creditors were lower, reflecting lower revenues from foreign-owned hotel infrastructure.

International tourism: the contribution of regions to the service sector

Europe region is the sole major contributor to the global travel and tourism industry. EU tourism presents one trip out of two by making up a 50% share of worldwide tourism [8]. Tourism in European countries makes up nearly 48% of the entire outbound travel and tourism activities globally [4].

The estimations based on 2018–2020 data on the travel and tourism industry of the DACH states showed a 5.1 trillion dollar contribution to their GDP. In 2019, the tourism industry contributed to Austria's GDP remained 446.31 billion dollars, Germany 3780.55 billion dollars, and Switzerland 704.83 billion dollars. Similarly, in 202, the tourism industry contributed to the Austrian G.D.P. amounted 432.89 billion dollars, Germany 3780.55 billion dollars, and Switzerland 707.87 billion dollars (UNWTO, W. 2019). The region of DACH in Europe consists of Germany, Austria, and Switzerland. In 2019, DACH nations GDP amounted to almost 3.86 trillion US dollars. Germany remained the largest and most significant contributor with approximately 5.01 trillion US dollars. The acronym DACH refers to Germany (D), Austria, Switzerland (CH), represents these three neighboring countries. These nations make the most significant community, and German presents as the de-facto national first and official language of most of the population. These three nations collectively represent the highest human development standards indicated in social and economic dimensions. The service industry's contribution to Austria's GDP remained 62.50%, whereas Germany's service industry significantly contributed 61.80% to its GDP. In terms of percentage, the service industry contributed 71.4% to GDP in Austria. There were almost 135 million travelers in 2018 to the DACH Germany remained the third-major spender on a truism, amounting to 94 billion US dollars. [6].

The tourism and leisure industry's growth rate accelerated in the 2010s due to many countries' active mobility and participation. Besides, China and the United States are two key market players besides intra-European countries tourism that have primarily contributed to the growth in travel and tourism. The increase in tourist numbers has caused some challenges, and numerous destinations attempted to find sustainable paths in coping with travelers' high intensity. Regardless, the travel and tourism industry has developed positive impacts and a significant contributor to the European economy. It directly contributed approximately 782 billion euros to the EU economy in 2018 and created 14.4 jobs. The statistics indicated the growing number of international tourist arrivals from 2010 to 2019 worldwide. The statistics of 2019 stipulated that there were 146.4 million arrivals of international tourists in North America and 61.4 million in the Middle Eastern countries. The appearances of international tourists showed a year-on-year increase between 2010 and 2019. Europe was one of the major destinations for international travelers in terms of region of origin. The European region accounts for more than 50% of international tourist arrival worldwide, and it is the most visited region globally, according to UNWTO. The travel and tourism industry has become a key driver of cultural and socio-economic progress, and it creates millions of employment opportunities within the travel industry [6].

The current descriptive research in the context of COVID-19 tourism impacts efforts to involve all participants in the same travel stakeholder community and may be inconsistent. For example, the COVID-19 pandemic is having a significant impact on tourism organizations (including intermediaries, transportation planners, and accommodation or attraction providers) depending on characteristics such as the size, location, management, and types of management in the tourism industry. Similarly, travel needs, which are very different from leisure and business travel, local and individual travelers, show that the various impacts of COVID-19 are expected and critical to the discussion in specific market sectors.

Tourism research in relation to COVID-19 may reveal various discernible forces of the pandemic. They may also include enhanced predictive capabilities, due to such differences in context, to predict or test any specific recommendations to identify any inconsistencies and shortcomings that may arise in various stakeholder groups in the tourism industry. Specific key tourism stakeholders, including tourism workers, local residents, tourism entrepreneurs, and tourism educators such as university staff, students and academics, are not included in the analysis.

UNWTO statistics and current travel trends

Global tourism experienced a 4% upturn in 2021, compared to 2020 (415 million versus 400 million). However, international tourist arrivals (overnight visitors) were still 72% below the pre-pandemic year of 2019, according to preliminary estimates by UNWTO. This follows on from 2020, the worst year on record for tourism, when international arrivals decreased by 73%. International tourism rebounded moderately during the second half of 2021, with international arrivals down 62% in both the third and fourth quarters compared to pre-pandemic levels. According to limited data, international arrivals in December were 65% below 2019 levels. The full impact of the Omicron variant and surge in COVID-19 cases is yet to be seen. The pace of recovery remains slow and uneven across world regions due to varying degrees of mobility restrictions, vaccination rates and traveler confidence. Europe and the Americas recorded the strongest results in 2021 compared to 2020 (+19% and +17% respectively), but still both 63% below pre-pandemic levels [12].

By subregion, the Caribbean saw the best performance (+63% above 2020, though 37% below 2019), with some destinations coming close to, or exceeding pre-pandemic levels. Southern Mediterranean Europe (+57%) and Central America (+54%) also enjoyed a significant rebound but remain 54% and 56% down on 2019 levels respectively. North America (+17%) and Central Eastern Europe (+18%) also climbed above 2020 levels. Meanwhile, Africa saw a 12% increase in arrivals in 2021 compared to 2020, though this is still 74% below 2019. In the Middle East arrivals declined 24% compared to 2020 and 79% over 2019. In Asia and the Pacific arrivals were still 65% below 2020 levels and 94% when compared to pre-pandemic values as many destinations remained closed to non-essential travel. The economic contribution of tourism in 2021 (measured in tourism direct gross domestic product) is estimated at US$1.9 trillion, above the US$1.6 trillion in 2020, but still well below the pre-pandemic value of US$ 3.5 trillion. Export revenues from international tourism could exceed US$700 billion in 2021, a small improvement over 2020 due to higher spending per trip, but less than half the US$1.7 trillion recorded in 2019. Average receipts per arrival are estimated to reach US$1,500 in 2021, up from US$1,300 in 2020. This is due to large pent-up savings and longer lengths of stay, as well as higher transport and accommodation prices. France and Belgium reported comparatively smaller declines in tourism expenditure with -37% and -28%, respectively over 2019. Saudi Arabia (-27%) and Qatar (-2%) also posted somewhat better results in 2021. [8]

Table 1. Impact of COVID-19 on the tourism industry

	2019	2020	2021
International tourist arrivals (overnight)	1.5 billion	400 million	415 million
Export earnings from international tourism (income from international tourism + passenger traffic)	$1.7 trillion USD	$638 billion USD	$700–800 billion USD
Tourism Direct Gross Domestic Product (TD GDP)	$3.5 trillion USD	$1.6 trillion USD	$1.9 trillion USD

Source: Prepared by the author. Based on World Tourism Organization (UNWTO) reports

According to the latest UNWTO Panel of Experts, most tourism professionals (61%) see better prospects for 2022. While 58% expect a rebound in 2022, mostly during the third quarter, 42% point to a potential rebound only in 2023. A majority of experts (64%) now expect international arrivals to return to 2019 levels only in 2024 or later, up from 45% in the September survey. The UNWTO Confidence Index shows a slight decline in January-April 2022. A rapid and more widespread vaccination roll-out, followed by a major lifting of travel restrictions, and more coordination and clearer information on travel protocols, are the main factors identified by experts for the effective recovery of international tourism. UNWTO scenarios indicate that international tourist arrivals could grow by 30% to 78% in 2022 compared to 2021. However, this would still be 50% to 63% below pre-pandemic levels. While international tourism bounces back, domestic tourism continues to drive recovery of the sector in an increasing number of destinations, particularly those with large domestic markets. According to experts, domestic tourism and travel close to home, as well as open-air activities, nature-based products and rural tourism are among the major travel trends that will continue shaping tourism in 2022. [12]

Table 2. Changing trends in travel preferences

CLOSER Domestic tourism has shown positive results in many markets as people tend to travel closer. Travelers go on vacation or vacation close to home.	MORE RESPONSIBLE TOURISM Sustainability, Authenticity and Locality: Travelers believe in the importance of making a positive impact on local communities, increasingly striving for authenticity.
AVOIDING THE 'CONTINUED' Nature, rural tourism, and road trips have become popular travel options due to travel restrictions and the desire for outdoor experiences.	LONGER STAYS AND HIGHER EXPENDITURES 2021 has seen a significant increase in travel and longer stay costs.

Source: Prepared by the author. Based on World Tourism Organization (UNWTO) reports

UN position on the impact of the COVID-19 pandemic on the tourism sector

The United Nations tourism body said on Monday that the coronavirus pandemic will cost the global tourism sector $2.0 trillion in lost revenue in 2021, calling the sector's recovery "fragile" and "slow". The Madrid-based World Tourism Organization's forecast comes as Europe grapples with a surge in infections and as a new heavily mutated COVID-19 variant, called Omicron, has spread around the world.

International tourist arrivals this year will be 70-75% lower than the 1.5 billion arrivals recorded in 2019, which was a similar decline in 2020, according to the body, before the pandemic hit. While the UN body charged with boosting tourism does not have an estimate of how the sector will perform next year, its medium-term outlook is not encouraging."Despite recent improvements, uneven vaccination rates around the world and newer COVID-19 strains" such as DeltaVersion and Omicron "may affect an already slow and fragile recovery," it said in a statement. UNWTO chief Zurab Pololikashvili told AFP that the introduction of new virus restrictions and lockdowns in many countries in recent weeks shows that "this is a very unpredictable situation." "This is a historic crisis in the tourism industry, but again tourism has the power to recover quite rapidly," he added on Tuesday ahead of the start of the World Trade Organization's annual general meeting in Madrid. While international tourism has been hit by disease outbreaks in the past, the coronavirus has been unprecedented in its geographic spread. The UNWTO said that in addition to virus-related travel restrictions, the region is also grappling with economic stress caused by the pandemic, rising oil prices and supply chain disruptions. Pololikashvili urged nations to harmonize their virus protocols and restrictions because tourists are "confused and they don't know how to travel [7].

Arrivals in some Caribbean islands and South Asia, as well as some destinations in southern Europe, approached and sometimes exceeded pre-pandemic levels in the third quarter. However, tourists were hardly seen in other countries, especially in the Asia-Pacific region, where the number of arrivals was reduced by 95% compared to 2019, as many destinations remained closed to non-essential travel [1].

According to UNWTO, a total of 46 destinations - 21% of all destinations in the world - are currently completely closed to tourists. Another 55 countries have partially closed their borders to foreign visitors, while only four countries have lifted all virus-related restrictions - Colombia, Costa Rica, the Dominican Republic and Mexico. The future of the tourism sector will be the focus of the WTO's annual general assembly, which runs until Friday. The event, which is attended by representatives of 159 UN member states, was originally planned to be held in Marrakech. Before the pandemic, the tourism sector accounted for about 10% of global gross domestic product and jobs [7].

Results

The path to tourism and travel recovery will require innovation and collaboration. While the pandemic is far from over, we must also have a plan for a better recovery, engaging governments, the private sector, civil society and other partners, and preparing to change business models and governance structures to meet new and different needs. In the short term, it will be important to clearly communicate actions to restore investor and consumer confidence. In the long term, increased resilience and resilience, as well as a more equitable distribution of benefits, will also be critical. Together, these approaches can revitalize the global tourism industry by harnessing its market power to support the economy, create jobs, and achieve development outcomes that put people and their communities first.

Some governments have been providing financial support, either directly or through soft loans and guarantees to the industry. Thailand allocated $700 million to spur domestic tourism, while Vanuatu offered grants to small and medium-sized enterprises. Countries have also been assisting firms to adapt their business models and retrain staff. In Jamaica, the government gave free online training certification classes to 10,000 tourism workers to help improve their skills. However, scarce budget space is a handicap for many tourism-dependent countries. It is possible that new initiatives to reactivate the sector will have an effect. In Costa Rica, for example, national holidays have been temporarily moved to Mondays to encourage national tourism by extending the weekend. Barbados has introduced a so-called "Welcome Stamp" visa, a residence permit that allows remote workers to live and work in Barbados for one year. Fiji has launched a blue lane initiative that allows yachts to dock in its harbors after meeting strict quarantine and testing requirements [5].

Once the pandemic is over, a sustainable transition to ecotourism — a fast-growing sector focused on preserving the environment and creating local jobs — could give the industry an extra boost. Ecotourism is already a fundamental component of Costa Rica's tourism strategy. Thailand is also trying to enter niche markets, including health and wellness markets and adventure travel.

Technology can also play an important role. As social distancing and health and hygiene protocols are likely to remain in place for the foreseeable future, contactless service delivery and investment in digital technologies could be a bridge to recovery [9].

Conclusions

Finally, if the decline in travel continues as a result of changes in traveler preferences or economic problems, some tourism-dependent countries may be forced to embark on the difficult path of diversifying their economies. Investing in sectors other than tourism is a long-term goal, but it can benefit from strengthening links between tourism and local agriculture, manufacturing and entertainment. In Jamaica, for example, an online platform has been launched that allows customers in the hospitality sector to buy groceries directly from local farmers. In addition, it is possible to expand exports, including services.

Specific solutions will vary from country to country, and the pace and extent of recovery will logically depend on international developments. But we have a wonderful opportunity that must be seized. Beyond the priority of mitigating the effects of the pandemic, countries must create a “new normal” for the tourism sector. Diversification, the gradual introduction of more sustainable tourism patterns, and investment in new technologies can support recovery.

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