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TOURISM INDUSTRY IN THE EUROPEAN UNION COUNTRIES

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Abstract: The article is devoted to studying the peculiarities of tourism development in the context of globalization. The aim of the research is to show the peculiarities of tourism development in the context of real threats and problems of globalization on the example of the EU. In the course of the study, the significance of tourism for the economy of the countries was analyzed. In particular, after 2020, tourism has reduced the share of formation of growth development product (GDP) by almost twice. According to the results of the study of tourist flows, it was determined that they were directed to the developed countries, which today are characterized by a significant level of morbidity, which prevents a rapid recovery of the tourism industry. Thus, the tourism market in Europe will be aimed at providing a healthy and environmentally friendly service.

Keywords: Pandemic, COVID-19, Tourism, EU, Globalization

1 Introduction

Relevance of the research. The world economy is considered one of the foundations of the functioning of modern society. It is a system of various economic, scientific, technical, production, monetary and financial interrelations of different states' economies, based on the international division of labor and resources. In the modern economical literature, trends in the development of the world economy are increasingly correlated with such a concept as "globalization" (Trunina et al., 2020). Due to the globalization of the world economy, tourism is reoriented to the external market; thus, there is a spread of tourist flows in the territory of one country and around the world. As a result, the share of tourism services in the world's total exports was more than 5.5% in 2020, although the figure in 2019 was 10.4% (WTTC, 2020).

If we examine the issue on the example of tourism of European countries, the situation has its peculiarities. Firstly, European countries are characterized by a rather high level of development, and the main tourist and financial flows come from the highly developed European countries. It creates and fixes specific standards of tourism characterized by the high quality of service, complexity of services, and high prices. But the specifics of tourism in European countries will be significantly changed in the post-pandemic period. At the same time, researchers and scientists do not know precisely what direction tourism will develop but can only assume the directions and features of tourism development according to the current situation in the level of COVID-19 spread. The issue of uncertainty in the development of the tourism industry in Europe increases the relevance of the research. It allows us to study the possible factors affecting tourism development and predict the possible directions of tourism development that meet the current situation.

2 Literature review

The issue of tourism development in the context of globalization is quite well researched at the scientific level. A large number of publications are devoted to the influence of tourism on the

economic development of countries. The issue is quite relevant in the context of European countries since some of them are characterized by a 20% share of tourism in GDP during the period before the crisis. Stabler et al. (2010) conducted a study on how diversification of the tourism industry has contributed to its rapid growth and positively impacts the economies of countries in the long term. Indeed, statistics provided by international organizations confirm the rapid development of tourism in Europe in the past ten years. In this case, clearly defined trends in the direction of improving service and environmental direction. Such a study was conducted by Govdeli and Tuba (2017), who identified the ecological direction as one of the most relevant. But in 2019, the situation with the direction of tourism development has completely changed, and today it is safe to say that the tourism industry has suffered most from the COVID-19 pandemic. Many studies of tourism development, which were conducted before 2020, become irrelevant because the market conditions have changed completely. If earlier the evolution was aimed at environmental friendliness, today it is aimed at ensuring the health of tourists. Thus, taking into account the analysis of current scientific research and the state of confrontation level COVID-19 by European countries, the study's main purpose can be identified.

The purpose of the research is to show features of the tourism development in the conditions of real threats and problems of globalization on EU example.

3 Materials and research methods

Modern scientific tools of complex analysis, including a variety of economic research methods: historical and logical, abstraction, historical-genetic and statistical analysis, ascending from the abstract to the concrete, graphic interpretation of the identified trends and processes, comparative analysis were used in this study. The method of averages is also used to summarize the information for the whole EU countries.

The information-empirical base of research is presented by the official statistical data of the international organizations, including reports on tourism development in the EU by such organizations as the World Tourism Organization, World Trade Organization, World Travel & Tourism Council; materials of individual studies from different countries, special periodicals, as well as the world information network Internet. The peculiarity of international statistics is that the travel item reflects all expenses of individuals-residents of the country in another country, i.e., both expenses for consumption of services proper and for purchase of goods for personal use or gratuitous transfer to other persons (not for resale). The methodological basis for the classification of forms of international trade in services, one of which is international tourism, is the IMF Balance of Payments and International Investment Position Manual (IMF, 2009). To refer to international tourism as a form of international trade in services, the Guidelines apply the concept of "travel". The purpose of this trip can be not only rest, excursions, acquaintance with foreign sights, participation in entertaining and cultural events, i.e. not only the purposes traditional forms of tourism in resting context.

4 Results

Talking about tourism as a global phenomenon, international tourism (tourism to other countries) accounted for 7.6% of total exports in 2019 (The World Bank, 2019). Overall, in the pre-crisis period, international tourism accounted for about 9% of global GDP and 1/11 of jobs worldwide, confirming its importance in the socio-economic development of member countries of the world tourism market and their regions (UNWTO, 2019). For many European countries, tourism has always been one of the main sources of income due to the favorable natural and climatic conditions in many European countries. If we analyze the economic importance of the tourism

industry in the EU countries, tourism has the biggest impact on the Croatian economy in recent years (10.2% of GDP in 2020 and 24.3% of GDP in 2019) (see Fig. 1).

Thus, the halving had a negative impact on the development of tourism and the development of related industries and the economy as a whole.

As of 2020, for the 28 EU countries, the average share of tourism in GDP is 5.07, while the figure was 10.24% in the pre-pandemic period.

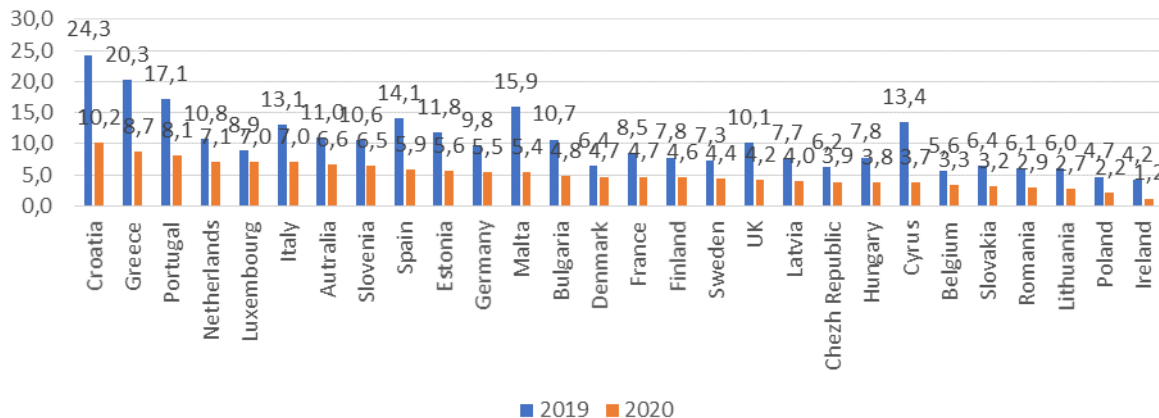


Figure 1 – Share of tourism in Europe's GDP in 2019-2020
Source: Statista, 2020

The main features of tourism in European countries are relative to the level of development of countries; tourists spend different amounts of time in different countries and accordingly spend a different amount of money. If we evaluate the tourism flows of tourists in the pre-crisis period among the European countries, the leader was France, which collected 87 million tourists a year. Spain is not far behind France. In 2019, this country was visited by about 87 million tourists. The top three include Italy, where the annual number of tourists is about 64 million. Germany,

Britain, Austria, and Greece have up to 30-40 million tourists a year (see Fig. 2).

But the assessment of tourist flows is not only based on the number of tourists but also on the amount of money that tourists leave in these countries. An interesting fact is that although France is the leader in tourist flows, Spain, France, and the United Kingdom collect the most money (see Fig.3).

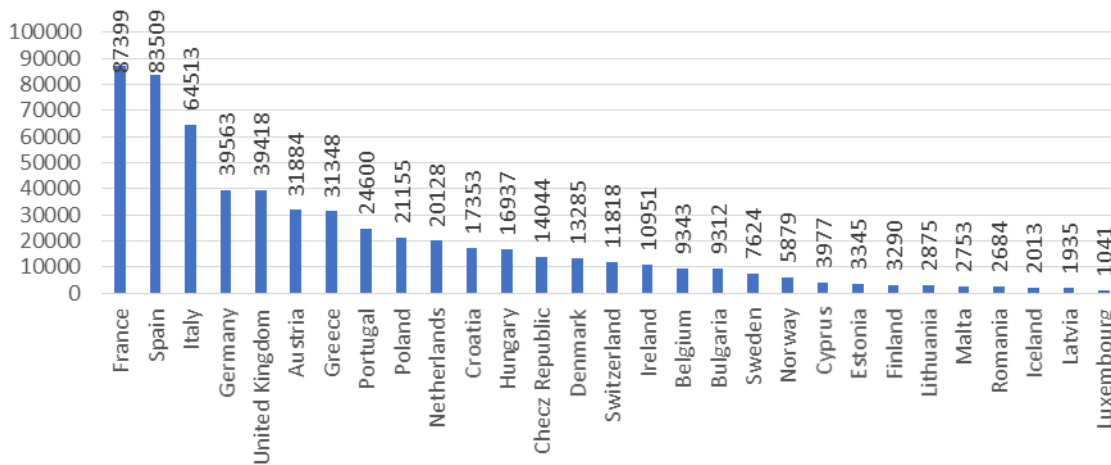


Figure 2 – Distribution of tourist flow by countries of Europe in the pre-crisis period as of 2019, in thousand people
Source: UNWTO, 2019

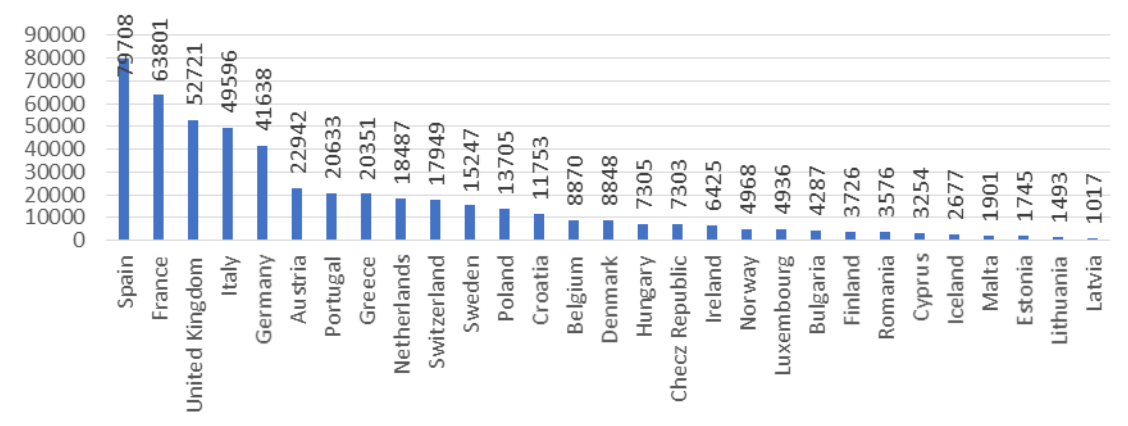


Figure 3 – Distribution of tourist money flow by countries of Europe in the pre-crisis period as of 2019, in million dollars
Source: UNWTO, 2019

Just two years ago, international tourism was characterized globally, becoming one of the leading socio-economic factors of world development. But with the development of economies and technologies, the global tourism market is constantly transforming. Diversification of tourist activity is increasing, new types of tourism and new markets are emerging, which will significantly change the geography of international tourist flows soon.

Today it is entirely possible most international tourist flows may be suspended, and tourists will rest in their own country. Such development is facilitated by the ratio of accumulated and lost bookings in tourist complexes of different countries. Therefore, in 2021 the trend of home tourism development is observed in Romania, Germany, Poland, Finland, and Switzerland (see Fig 4).

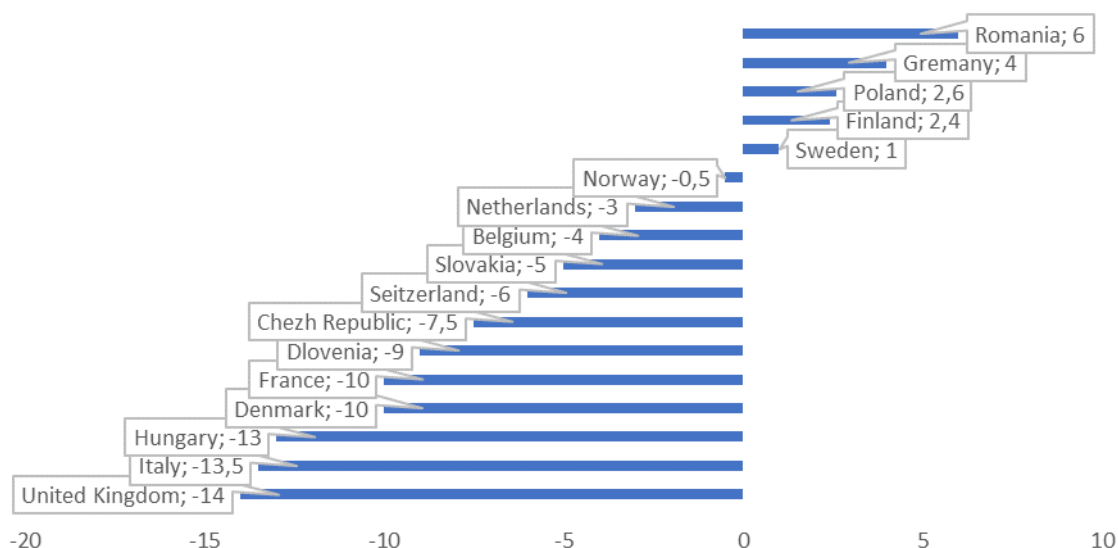


Figure.4 – Countries with the best advantages of domestic tourism in 2021 (ranking based on the ratio of booked and refused trips)
Source: Tourism Economics, 2021

Today, the period of the primacy of global package tours is ending; the market of low-cost transportation and electronic reservation systems is developing; information technology in tourism is rapidly growing to reduce the cost of tourist trips. In solving the purpose of the research, let us highlight the main features of tourism development in the globalization context.

- Dependence on the level of COVID-19 incidence in the country.
- The dependence of ecological situation in the country, in a particular climate, fires, and other natural factors.
- The reduction of travel costs according to the globalization of tourism service.

- Orientation of the tourist to the domestic market.
- The use of digital technologies in reservations.

The processes of globalization find expression in the international interweaving of private capitals, the strengthening of interconnections between monopolies of different countries, and the broad development of TNCs in the sphere of tourist business. This process, in turn, contributes to the formation and dissemination of international standards of tourist services.

The main players in the European market are Expedia Group, which has 31% of the market, and Booking Holdings, which has 29% (see Fig. 5).

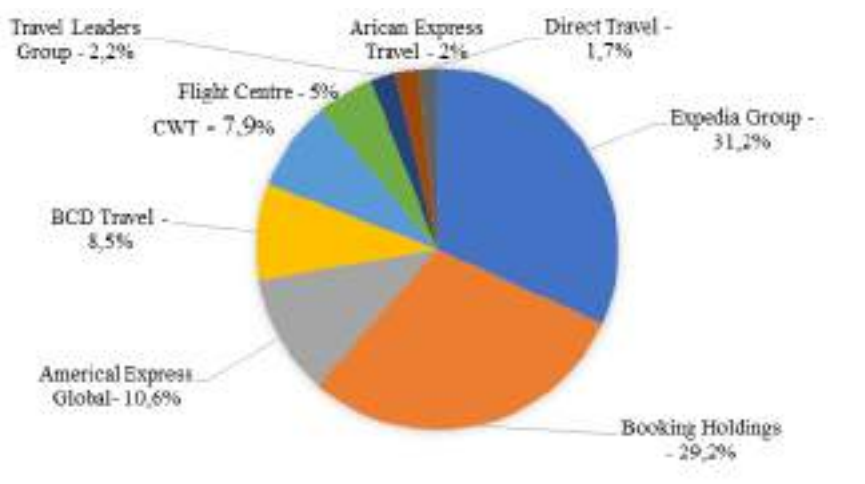


Figure 5 – Distribution of the travel retail market among international companies in 2020
Source: TIPSNE, 2020

The spread of tourist services sales in the international market is promoted by the intensive use of information and computer technologies, the increase in the use of new means of personal communication between users of the Internet. For example, more than half of French people (51%) go directly to hotel websites in France, and 41% make reservations through online agencies. Traditional agency sales account for only 10%. When French people want to book a hotel room, 51% visit the website of the hotel where they want to stay. 41% use online booking platforms for their travel needs. The most famous site is Voyages-sncf.com (71%), the least known is Booking.com (44%). According to surveys conducted, 71% of French people and 88% of hotel owners understand the vital role of booking sites in further developing the French travel industry (Barbaux, 2013). As a result of low-cost advertising campaigns, new operators are entering the digital travel market. They have a great chance of winning new customers and intercepting them

from main retailers, which may not have the time to change their sales concepts according to market expectations.

These features of the international tourist services market development, in turn, cause the emergence of many issues. The most important problem in the development of the tourism industry today is its recovery from the pandemic. According to statistics, in 2020, the level of tourism fell to the 1990 level, losing 1 billion tourists (Statista, 2021).

Therefore, let us consider how international tourism is represented in the structure of international trade in services and how its share within the framework of the said trade has changed, using WTO statistics for this purpose (see. Fig.6).

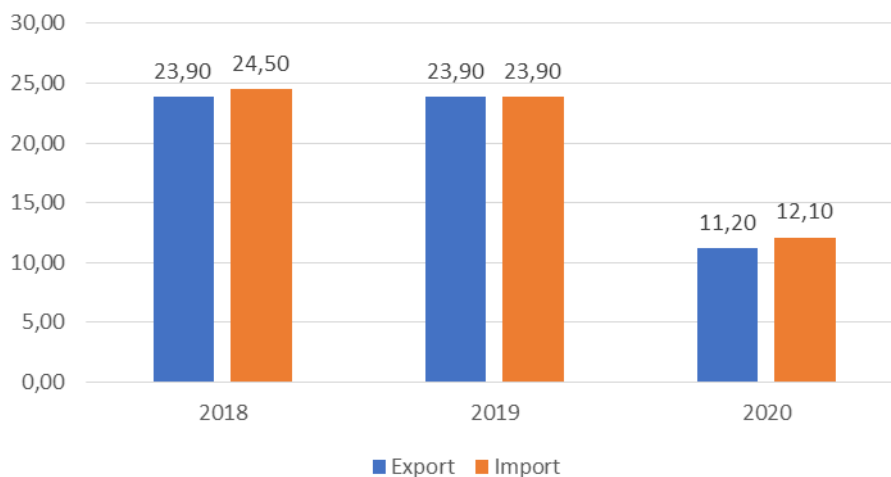


Figure 6 – Volume of international tourism in international trade in services by EU country
Source: WTO, 2021

In one year, the rate of tourism services exports decreased from 23.9% of total services exports to 11.2%. If we talk about imports, the figure fell from 23.9% of total imports in 2019 to 12.1% in 2020. If we talk about the monetary dimension of tourism, the figures for 2020 decreased by more than two times.

Thus, the volume of international exports of tourist services in 2020 was \$181 billion, while in 2019, it was \$377 billion. The volume of imports in 2020 was \$155 billion, while in 2019, the figure was \$344.4 billion (see Fig.7).

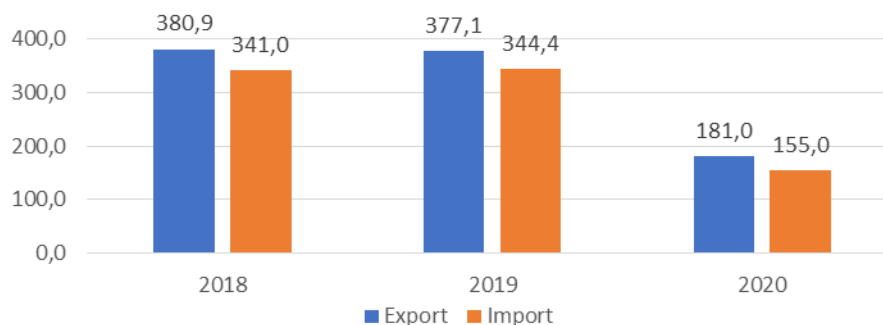


Figure 7 – Volume of international tourism, in billions of dollars by EU countries

Source: WTO, 2021

The decline of coronavirus-related tourism is threatening the economies of many countries. However, according to a UNWTO (2020) survey in Europe, only 1% of the population expects the returning of tourist flows to 2019 levels in 2021; at the same time, 47% expect that tourism will return to 2019 level in 2022. According to Tourism Economics (2021), there will be a 64.8 (inbound tourist flows) and 61.8% (outbound tourist flows) increase in 2021 compared to 2020, and by 2022 there will be a full resumption of 2019 numbers. In 2023, visitor growth is projected at 23.3 percent for inbound tourism flows, and 25.1 percent for outbound tourism flows. Today it is almost impossible to predict the recovery of the tourism sector because, as the data on COVID-19 shows, there are still many new infections in Europe despite the high level of vaccination among the population. To date, the leaders in the incidence of the disease are the United Kingdom, France, and Spain. In other countries, the incidence rate is much lower (see Fig. 7, 8, 9).

Factors influencing the development and resumption of tourism are very multifaceted. The presence of positive factors is the intensity of vaccination of the population in countries, leads to the predominance of individual regions and the country as a whole in world tourism. For example, Malta, Finland, Hungary, and the United Kingdom will finish vaccinating their populations the fastest. Thus, for the most part, vaccinating people in European countries will end in 2021.

5 Discussion

Today, the issue of resumption of the tourism industry is one of quite studied in scientific circles. Many believe that it's necessary to abandon new development methods, which were not used in the pre-crisis period. In particular, it is essential to focus not on increasing the tourist's flows but to ensure their safety.

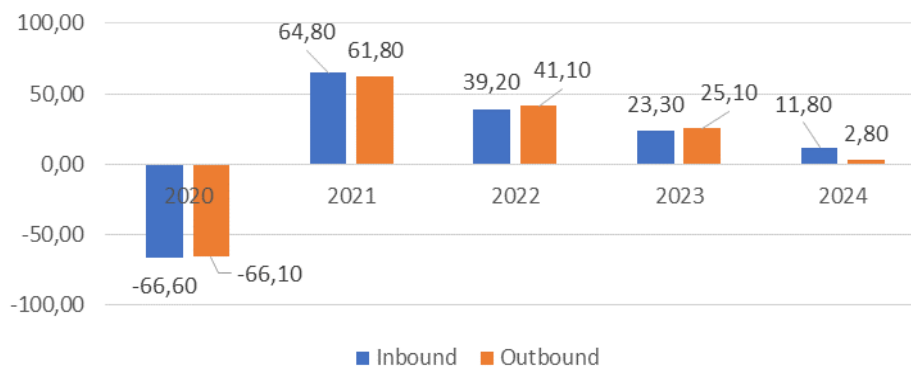


Figure 8 – Projected tourism growth in Europe in 2024

Source: Tourism Economics, 2021

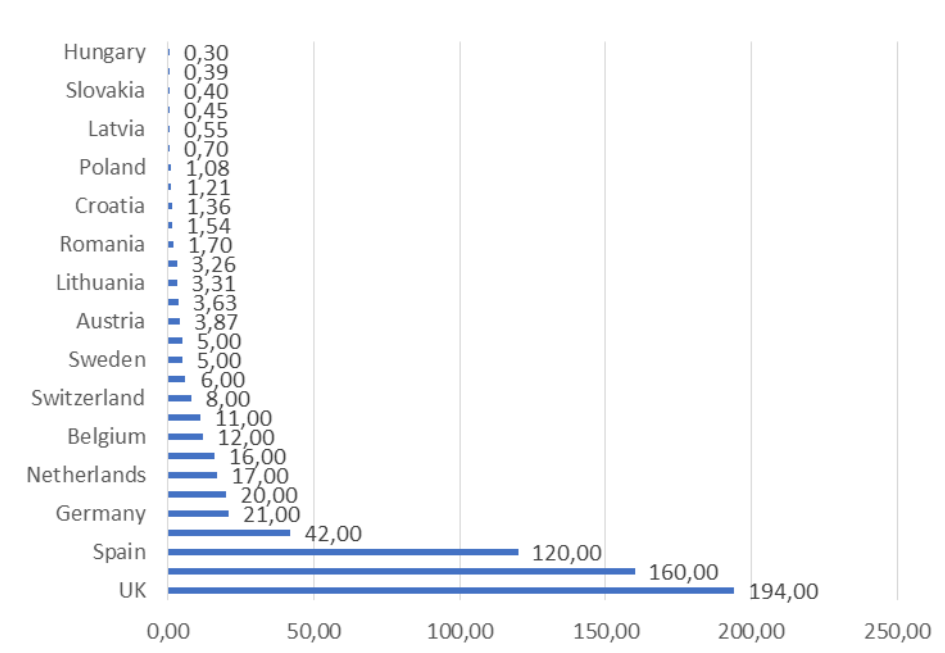


Figure 9 – Incidence rates in European countries in August 2021

Source: Worldometers, 2021

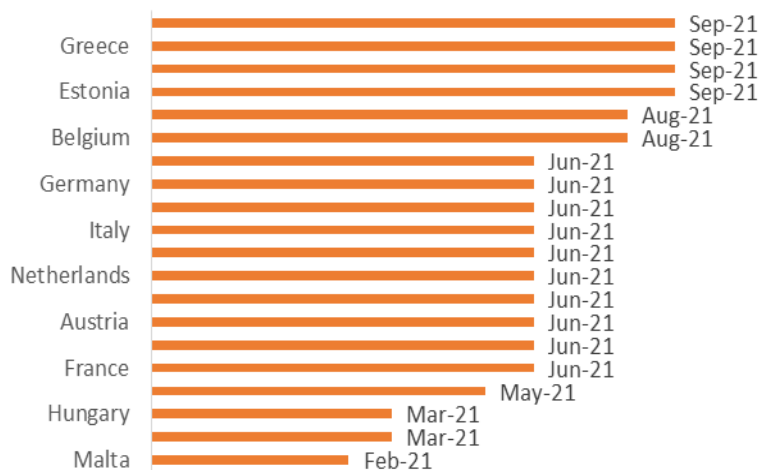


Figure 10 – Vaccination end dates in EU countries

Source: Tourism Economics, 2021

Some researchers believe that in order to renew the industry, it is necessary to apply measures not only on the part of the business but also the state. This is especially important for tourist companies that use raised funds for development and are unable to repay interest during a period of declining tourist numbers. The period of reduced tourist flows should be used to improve service standards and prepare for the resumption of tourist flows (Siby et al., 2021). Other researchers believe that the resumption of the industry must improve by risk management to cope with the recurrence of crises. In this case, some researchers believed that it takes one year to resume tourism, and others that full resumption of the industry will take much longer (Skere et al., 2020). It should be pointed out that for developing countries, the only way to restart the industry is to improve medical care (Ulak, 2020). In most cases, the resumption of tourism in different countries requires a comprehensive approach, which includes both improvements of tourist services and government support for tourism. Today, many researchers believe that the safety and health of humanity are the priority over the development of the tourism industry. Therefore, all funds are directed to the fight

against new coronavirus cases in different countries. It is definitely possible to say that vaccination will directly impact tourism development because vaccinated people and people with immunity will be open to tourism services (Sönmez, 2019; Deb & Nafi, 2020; Jamal & Budke, 2020).

6 Conclusion

Tourism is one of the brightest industries that are actively developing under the influence of globalization processes. Today, tourism is not only socially but also economically important. In many countries, this industry forms a significant part of the GDP, which applies to those countries where recreation is not expensive. The main trends of tourism development have completely changed in the post-pandemic period. Whereas until recently, the development of tourism was predicted in the direction of market conquest by multinational companies, which provided comprehensive services, today people choose safe places with small tourist flows and even reorient to domestic markets. Furthermore, the digitalization of

the economy promotes tourism in unpopular countries. It allows for easy planning of tourist trips and efficient allocation of budgets, significantly reducing the cost of tourist services. At the same time, today, the question of the peculiarities of tourism development is quite different. People are focused primarily on health and environmental safety so that the tourism industry will develop in this direction. While France, Spain, and Italy received the main tourist flows earlier, today, as France remains among the countries with the highest number of diseases, the market will be reoriented toward those countries that can guarantee safety for people. Studies show that vaccination of the population is the primary tool for the resumption of tourism in the country. Still, this issue is not scientifically proven, so it acts as a hypothesis, which can only be proved or disproved with time. Tourist flows today are gradually resuming in countries with low levels of disease, so the main part of tourists will be directed to the countries with low levels of disease, including Croatia, Bulgaria, Austria, Norway, Sweden, Portugal.

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