Message from the President

COVID-19 and global tourism

The year 2020 sees the world venturing into unchartered territory. Most of us thought that the COVID-19 virus that was first identified in the Chinese city of Wuhan in December, would mainly affect China and possibly the Asian region, without spill-over effects to the rest of the world. Since COVID-19 is family of the SARS virus that was first reported in February 2003 in Asia and which spread slowly, affecting 29 countries, with a total of 8 000 deaths worldwide, a similar scenario was initially envisaged.

However, today we face a virus that has affected almost all countries around the globe. In total, 210 countries have thus far reported cases of COVID-19. Some countries that faced early exposure to the virus and reported high mortality rates, sent clear warning signals to the rest of the globe. This has led to large-scale closure of borders in most countries that directly affected the movement of people between countries. Within many countries, travel is also prohibited across regional/provincial borders.

In this pandemic, no other industry has been harder hit than the tourism industry. The closure of borders and restrictions on movement of people between and within countries have brought the industry to a standstill. The UNWTO reports that 45% of all countries have either closed their borders totally or partially, with 30% suspending flights. It is therefore not surprising that globally tourism is expected to decline by between 50 and 80% during 2020.

The decline in tourism predicts tough times for all sectors of the tourism industry. It is expected that many tourism businesses may not survive this pandemic, resulting in job losses and socio-economic hardship for many of the world's most vulnerable people. While governments and international agencies are assessing various relief measures that may assist the industry, the recovery of the tourism industry is also widely discussed.

The web-seminar hosted by Steve Hood from STR (if you missed it, follow this link https://www.dropbox.com/s/ek8ef875kypovz5/IATE%204-24-20.mp4?dl=0) gave hope that the industry is slowly starting to recover. Countries that were exposed first are starting to open up their borders and tourism is again picking up slowly. International tourism companies are also optimistic that business will pick up soon and many are already taking bookings. It is with this positive outlook that we as an Association look forward to the future of our industry and we hope to contribute, through research, to its recovery and prosperity.

I conclude with the words of the South African Minister of Tourism (Mmamoloko Kubayi-Nguabane), "We will travel again". In the meantime, stay safe until we meet again at our next conference.

Andrea Saayman
IATE President
North-West University, South Africa

In this issue

IATE Conference 2021

IATE 2021 will be held (late June or beginning of July) at the University of Perpignan (France). The definitive schedule will be announced in the call for papers that is expected for July 2020.

The event is co-organized by University of Perpignan, Polytechnic University of Hauts-de-France and University of Corsica. The research fields in tourism economics of these French universities cover a broad range of topics such as efficiency and productivity analysis, destination competitiveness and economic growth.

The conference team is coordinated by three long time IATE members: Sauveur Giannoni, Sylvain Petit and Nicolas Peypoch.

We are pleased to already announce two keynote speakers: Pr. Albert Assaf, Editor in Chief of Tourism Economics (University of Massachusetts-Amherst, USA) and Pr. Egon Smeral (MODUL University Vienna, Austria). Social program will include visits of wineries with tasting in the countryside and the seaside as well.

Sauveur Giannoni
University of Corsica, France

News from the journal, Tourism Economics

March and May 2020 issue – The March issue of Tourism Economics is a Special Issue on "Tourism Economics in China: Facing the new normal", edited by Songshan (Sam) Huang, ShiNa Li and Junjie Wen.

This Special Issue includes the following topics.
- Housing wealth and tourism consumption
- Tourism and poverty reduction
- Hotel productivity
- Belt and road initiative and inbound tourist market
- Foreign direct investment and tourism development

The May issue includes the following topics.

- Tourism-growth nexus under duress
- ICT as an engine for the tourism-growth nexus
- Sharing economy, guesthouse boom and the crowding-out effects
- Service experience: tourism factories vs. international tourism hotels
- Tourist expenditure
- Implications of lagged dependent variable in tourism demand models
- Terrorism, inbound tourism, and immigration
- Tourism and urban economic growth

As usual, we would like to thank all contributors, in particular the IATE members, and we look forward to receiving your future submissions!

Albert Assaf and Raffaele Scuderi
TOURISM ECONOMICS
https://journals.sagepub.com/home/teu

Global hospitality industry overview

The hotel performance reports for March 2020 are currently available from STR. In this newsletter, the unprecedented performance lows due to the Covid-19 are shared with the IATE community with reference to five main regions of the world.

Asia-Pacific

According to STR data, reflecting the effects of the COVID-19 pandemic, the Asia Pacific hotel industry reported all-time lows in the three key performance metrics during March 2020. The following statistics summarise the Asia-Pacific performances of March 2020 compared to March 2019:

- Occupancy: -59.5% to 28.3%
- Average daily rate (ADR): -17.6% to US$80.82
- Revenue per available room (RevPAR): -66.7% to US$22.85

China's absolute occupancy level has increased compared to February (12.8%), which was the lowest occupancy month on record in the country. Key markets, Beijing and Shanghai, reported decreases in the metric of 78.7% and 73.7%, respectively. China's ADR remained lower than February (CNY406.22), but RevPAR was up slightly from that second month of the year (CNY52.12). Singapore registered the lowest absolute occupancy and RevPAR levels for any month in STR's Singapore database.

Central/South America

In its first month with a visible impact from the COVID-19 pandemic, the Central/South America hotel industry reported steep declines in the three key performance metrics during March 2020. The following statistics summarise Central/South America performances in March 2020 compared to March 2019:

- Occupancy: -48.0% to 31.0%
- Average daily rate (ADR): -6.1% to US$85.61
- Revenue per available room (RevPAR): -51.2% to US$26.56

STR analysts note the low performance of key markets, such as Bogotá with a 48.4% decrease in occupancy, and Rio de Janeiro and São Paulo, which recorded occupancy declines of 46.2% and 46.9%, respectively.

Europe

Reflecting the impact of the COVID-19 pandemic, Europe's hotel industry reported unprecedented performance lows during March 2020, according to data from STR:

- Occupancy: -61.6% to 26.3%
- Average daily rate (ADR): -8.1% to EUR96.13
- Revenue per available room (RevPAR): -64.7% to EUR25.27

The absolute occupancy and RevPAR levels in Europe were the lowest for any month on record. Italy's occupancy started to decline at the end of February with national occupancy in March ranging from -90.8% to 6.2%; United Kingdom absolute occupancy and RevPAR levels were the lowest for any month in STR's U.K. database.

Middle East and Africa

Showing the impact of the COVID-19 pandemic, hotels in the Middle East and Africa reported steep declines across the three key performance metrics in March 2020 compared to the same month last year.

<u>Middle East</u>

- Occupancy: -51.5% to 35.6%
- Average daily rate (ADR): -19.3% to US$114.88
- Revenue per available room (RevPAR): -60.8% to US$40.86

Africa

- Occupancy: -51.6% to 31.1%
- Average daily rate (ADR): -6.4% to US$102.09
- Revenue per available room (RevPAR): -54.7% to US$31.72

STR analysts note that key markets such as Abu Dhabi and Dubai, recorded steep declines in occupancy, -35.6% and -54.7%, respectively, and Cape Town experienced a drop in occupancy of 46.5%.

North America/US

For US, STR reports that "occupancy, room rates and RevPAR have plummeted at alarming rates with the virtual standstill of business, travel and leisure activity" indeed the US metrics show the unprecedented crisis the industry is facing amid the coronavirus pandemic.

In a year-over-year comparison with March 2019 the industry data show:

- GOPPAR (Gross operating profit per available room): -101.7% to US$-2.10
- TRevPAR (Total revenue per available room): -64.0% to US$104.93
- EBIDTA PAR (Earnings before interest, income tax, depreciation, and amortization): -116.8% to US$-15.44
- LPAR (Total Labor Costs per available room): -31.2% to US$66.16

Among top markets, New York reported the steepest GOPPAR decline (-203.0%), followed by Chicago (-201.4%) and Seattle (-158.0%).

For more information, contact the STR SHARE Center, sharecenter@str.com.

Steve Hood
STR
https://str.com/

Tourism and Covid-19

COVID-19 and tourism: Asia

Asia to Drive Early Visitor Recovery

Asia Pacific Visitor Forecasts 2020-2024 were recently released by the Asia Pacific Travel Association The forecasts were carried out by a research team led by Professor Haiyan Song from The Hong Polytechnic University and Professor Gang Li from the University of Surrey. In the forecasting report the forecasting team has paid particular attention to the impact of the COVID-19 pandemic on the visitor flows and receipts within the Asia Pacific Region. The following is a summary of the forecasts.

Asia is predicted to spearhead a return to visitor growth across Asia Pacific in 2021. Taking into account the impacts of the COVID-19 pandemic, the volume of arrivals under a most likely scenario is now expected to return to over 610 million in 2021, barring any other unforeseen interventions. This initial recovery is expected to see growth of around three percent above 2019 levels and herald a return to the initial forecast levels shortly thereafter.

This growth in international visitor arrivals (IVAs) is likely to vary by source regions, with Asia expected to rebound with the fastest growth relative to 2019, as shown below. The Americas, which is expected to show the lowest contraction in its rate of growth in 2020, is forecast to continue with much weaker growth rates over the years to 2024.

During the expected recovery phase in 2021, Asia is expected to generate significantly improved arrival numbers, rebounding from a loss of almost 104 million visitors between 2019 and 2020 to growth of 5.6% in 2021 relative to 2019, delivering more than 18 million more arrivals over that period.

Arrivals into the Americas are expected to be relatively strong in 2021, with a net increase of 2.9 million visitors relative to the volume generated in 2019. This is expected to be driven largely by intra-regional flows (Americas-to-Americas) which, after a decline of 4.3 million arrivals between 2019

and 2020, are expected to recover rapidly and generate more than 2.5 million arrivals into the Americas relative to 2019. By the end of 2021, total IVAs into the Americas are projected to be close to three percent above the volume received in 2019. Central America is clearly the strongest generator of arrivals between 2019 and 2021, with more than three-quarters of the additional IVAs coming from that source sub-region alone.

The top five source sub-regions for the Americas between 2019 and 2021 generate a sufficient volume of arrivals into the region to offset continued losses from other source sub-regions and markets. Into and across Asia, the largest volume increases between 2019 and 2021 are also predicted to be intra-regional (Asia-to-Asia) for the most part, with a rebound from a loss of almost 98 million arrivals between 2019 and 2020 to an increase of over 17 million between 2019 and 2021.

All the source regions of Asia are projected to show growth between 2019 and 2021, with Europe and the Americas in particular, adding increases in arrivals of 2.5 million and 1.7 million, respectively over that period. By the end of 2021, Asia is predicted to have visitor arrivals numbering five percent more than in 2019.

The strongest growth in visitor arrivals into Asia is largely out of the Asian source sub-regions, with strong assistance from Central America and East Europe. Together, these top five source sub-regions are predicted to account for 84% of the overall growth in arrivals into Asia between 2019 and 2021. Over three-quarters of that growth volume is projected to come from three of the five Asian source sub-regions.

The Pacific, as a destination region, is likely to have more subdued growth between 2019 and 2021, almost reaching the same volume of IVAs into the region as in 2019. It is not expected to return to growth beyond that however until 2022 when visitor arrivals are expected to increase by 10.5% above those of 2019. While arrivals out of Asia are expected to be substantial in 2021 relative to 2019, they are not expected to be substantial enough to offset losses from other source regions, especially the Americas. In 2022, however, all source regions are predicted to deliver substantial growth in IVAs, adding an aggregate increase of a little under three million over the volume received in 2019. At that time, Asia will be the primary source region, delivering 32% of the expected 30.7 million visitor arrivals into the region.

While North America is expected to deliver the most IVAs into the Pacific in 2022, the strongest incremental growth in arrivals between 2019 and 2022 is predicted to come from Northeast Asia, followed by Southeast Asia and then Oceania. The top five source sub-regions into the Pacific in 2022 are expected to deliver close to 83% of the additional IVAs over that period.

"While we can expect to see severely reduced visitor arrivals into Asia Pacific this year, and for some through 2021 as well, there is hope going forward. The travel and tourism sector as we have seen during past calamities, is nothing if not resilient, and we expect to see growth beginning in 2021 and continuing on thereafter. That makes the assumption of course that this pandemic and its associated negative effects are contained and over by then," said PATA CEO Dr. Mario Hardy. "As we rebuild the travel and tourism sector into the future, it is worth considering whether we want it to be 'business as usual' or whether we can initiate new policies, procedures and practices that will enable us to see beyond the vision of growth at all costs. Perhaps now we can give real meaning to the oft quoted mantra of 'people before profit' and create a sector that generates employment and business opportunities first that can then deliver memorable experiences to visitors across Asia Pacific and indeed the world."

"Millions of people have lost their jobs as a result of this pandemic and we need to ensure that as the travel and tourism industry recovers, we create opportunities for their re-employment as a precursor to growing a more sustainable visitor base," he added.

Contributed by Haiyan Song and Gang Li

COVID-19 and tourism: Europe

Italy

Italy, the first European country highly affected by the novel Coronavirus disease, became, in March, the most affected country in terms of number of people infected with Covid-19, with a dramatic record in terms of deaths caused by the virus. Tourism perspectives for Italy are not encouraging. There were Italian regions with more severe restrictions but, in general, people's mobility has been deeply reduced.

In Italy, from March 11, restaurants could just deliver food. Take away was allowed only from April 28. Tourist flows has been insignificant. In many regions, beaches are closed until the 1st of June. Rules for reopening business' doors were unclear for a long time and new regulations are still difficult to implement particularly for small businesses. At the beginning of the outbreak, hotels owners had no clear procedure to follow in case of finding a positive Covid-19 customer or staff member. This created uncertainty and some hotel managers are questioning when and under which condition to reopen hotels for this summer. Italy is characterized by strong seasonality with a large share of hotels open only from May-June to September-October. Thus, the summer season is essential to their survival. Italian destinations have all seen the effects of these months of lockdown, with the tourism, hospitality and travel business highly affected by the restrictions on movement of people, the closure of country borders and the stay home orders.

On the 4th of May Italy gradually eased the lockdown and entered phase two. Many tourism activities will however restart later. In particular, restaurants, pubs, and bars are expected to open at the beginning of June. But still, the exit plan is not clear compared to other countries and this uncertainty deeply affects the confidence of managers operating in any sector, in particular in the tourism industry. Despite the beginning of phase two, mobility will remain severely reduced with people having to justify their travels (even short-haul travels) at least for a few more weeks, but being able to move within their own region, without crossing the regional borders. Sentiments of refusal towards Italian tourists have been already expressed by several countries and are going to also limit Italian international tourism. The Italian government is, similarly to others, supporting domestic tourism and is introducing a 500-euro voucher for Italian households with low-medium income to be spent on holidays in Italy.

Contributed by Laura Vici and Serena Volo

Spain

Spain has been the second more affected country in Europe after Italy in terms of the health situation. A strict confinement has been in place since the 14th of March, which implied a complete closure of the hospitality and tourism activities. The first phase of relaxation of the confinement is scheduled from the 11th of May.

The different regions experienced varied prevalence of the pandemic. With the main urban destinations, Madrid and Barcelona registering the highest number of cases. In terms of tourism, the two archipelagos, which are the second and third main Spanish tourism regions after Catalonia have been severely affected.

The prospects are also particularly negative as their economy is heavily dependent of tourism, and, particularly, on international visitors which are likely to be affected by the connectivity and international restrictions.

In the case of Balearic Islands, they have a strong seasonal pattern with the high season months going from June to September. That generates a high risk of losing the major part of visitors due to the timing of the Crisis both in its own territory and at their main origin markets (United Kingdom and Germany).

Contributed by Eugeni Aguilo and Vicente Ramos

France

In France lockdown officially started on March 17th. Since then hospitality and tourism activities are closed, except for food delivery services. As in Spain, the deconfinement process started on May the 11th but some limitations exist that really put tourism activity at risk. First, restaurants and some other tourism related firms cannot open before the 2nd of June at best. Second, travels are typically restricted in a range of 100km from your home. Furthermore, most of sports and cultural events scheduled from June to August are already cancelled. In a country where some regions such as Corsica or French Riviera are heavily dependent on summer tourism, prospects are extremely negative. The government recently asked the population who could afford vacations to prefer tourism in France rather than abroad.

Contributed by Sauveur Giannoni

COVID-19 and tourism: a snapshot from South America

According to the United Nations' Economic Commission for Latin America and the Caribbean [ECLAC], the region has to face the COVID-19 pandemic from a weaker position than the rest of the world. This is a consequence of considering that last year estimates indicated that this part of the world would grow, in the best scenario, 1.3% in 2020. Such estimates now point towards a minimum GDP decrease of 1.8% —with the least favourable forecasts indicating a decline of 4% or even more.

The fall in the tourism demand is one of the main external channels causing this, especially in the small developing islands in the Caribbean. In this area in particular, tourism explains more than 20% of national GDP (according to 2018 data, cited in ECLAC, 2020) and is expected to fall by 25% if travel restrictions continue during the whole first semester, something that will most likely occur.

In the most touristic countries of Latin America, the pandemic has put under risk a worrying number of job positions in the sector. Forecasts indicate that, in Mexico, 1.7 million jobs in the travel and tourism sector could be lost due to COVID-19. These numbers could reach 1.2 million in Brazil and 200 thousand in Argentina (Statista, 2020). Considering one sector such as commercial air transport, the region is facing a dramatic situation with an average of only 10% of its usual operations taking place and reaching almost zero in countries like Argentina, where the latest regulations even prohibit regular flights until September 2020 (Infobae, 2020).

To mitigate these adverse effects on tourism, countries are working on different measures of public policy, especially at the national level. In the case of Argentina, for example, these include the delay or exemption on most of the employer's social security contributions, an employee wage compensation for businesses with 100 employees or less, and an increase in the current unemployment insurance.

Latin America and the Caribbean host developing countries, some of which are still very fragile. Public policies in tourism are thus crucial to alleviate the pressure this sector is currently facing.

Contributed by Natalia Porto and Carolina García

COVID-19 and tourism: South Pacific

Fiji

The coronavirus arrived in Fiji on March 19, 2020. By April 20, 2020, eighteen cases have been confirmed with 14 of those cases have recovered at the time of writing (May 10, 2020). The day after Fiji's first case, all international flights were suspended until the end of May. On May 8th, this was extended until the end of June. Freight flights continue to operate and there have been several 'recovery' / evacuation flights operating between Los Angeles, Sydney, and Auckland with Nadi, Fiji's international airport to bring Fiji citizen's home and allow

expatriates and remaining tourists to return home.

Tourism is the backbone of the Fiji economy, like a lot of other Pacific Island Countries and Territories. Ten out of the 13 countries that do not have any recorded cases of coronavirus are Pacific Island Countries or Territories. Given that these developing countries do not have well-equipped health facilities and medical resources, they closed their borders immediately as they remain particularly vulnerable to an outbreak.

In 2018, over 40,000 people were employed directly and a further 110,000 employed indirectly in Fiji's tourism and hospitality sector; 35.5% of total employment. With no international tourists and being a developing country, so that domestic tourism has only limited potential, Fiji tourism and the overall economy is being hard hit. Hotels and airlines have required staff to use their annual leave. When that is exhausted, they will take Leave without Pay. Fiji Airway's senior management is taking a 35% pay cut.

According to the Fiji Hotel and Tourism Association an incredible 279 hotels and resorts have closed since the outbreak, causing more than 25,000 to lose their jobs. For an economic stimulus, the Fiji Government announced a FJ$1 billion COVID-19 Stimulus Package. This is in response to a forecast contraction of 4.3% in the Fiji economy this year. Development agencies such as the Asian Development Bank and the World Bank have offered an increase in funding from US$100 million to US$200 million and US$5.5 million from its COVID-19 facility, respectively. There is some possible hope for Fiji to join an Australia / New Zealand travel bubble so that travel restrictions are eased and international tourism between the three countries could resume.

New Zealand

New Zealand has been in some form of lockdown since 24 March, with over a month of full level 4 lockdown. With its first case recorded on February 28, at the time of writing (May 11, 2020), New Zealand has 1,497 cases with 21 deaths and 1386 recovered cases. Rather than trying to 'flatten the curve', New Zealand has ambitiously sought to eliminate the virus. One factor in New Zealand's favour is the country's relatively isolated location, which means New Zealand was less likely to be visited by people originating from China or other infected areas. The tyranny of distance can often be a disadvantage for encouraging international tourists to visit your shores. In this case, it has helped New Zealand mitigate the impact of COVID 19 spreading widely throughout the country. The other measures that have helped New Zealand stop the spread of COVID 19 are the strict lockdown measures, coupled with self-isolation mandates, quarantines, widespread testing, and contact tracing. With a relatively small population (approximately 5 million), New Zealand has done an extensive amount of testing for coronavirus (190,326 as of May 9, 2020) or 39,468 tests per one million population.

Tourism for New Zealand is an important sector. It is worth about 6% of GDP directly and another 4% indirectly from supporting industries. Prior to the COVID-19 pandemic, tourism was New Zealand's biggest export earner, contributing $17.2 billion or 20.4% of New Zealand's foreign exchange earnings (year ended March 2019). 14.4% of the total number of people employed in New Zealand worked directly or indirectly in tourism. Educational tourism in the form of international students studying at New Zealand institutions is a large tourism segment. Closed borders as well as closed schools and universities will hurt this segment in the medium to long term. In mid-February 2020, the New Zealand Government funded the National Destination Marketing Organization, Tourism New Zealand, to the value of NZ$10 million to boost COVID-19 response plans. As with many other economies, domestic tourism will be encouraged and the short-haul market, particularly Australia will be targeted. Australian tourists seeking a short break or ski enthusiasts will be encouraged to visit in the second half of 2020 if international travel between the two countries begins again. Australians are the largest source market, making up 55% of the international tourism market. Last Thursday

7th of May, Prime Minister Jacinda Ardern revealed that people will be able to move around the country, but with an emphasis on safety. The country has moved to coronavirus level 2 in three separate stages starting from Thursday 14th of May. At 11.59pm on Wednesday most of level 2 was enacted. Much of the economy will open including restaurants, malls, cinemas, shops, health services, and hairdressers. People will be able to socialise with others and travel around the country, as well as playing team sports. On Monday - May 18 - schools and early childhood centres opened and finally on Thursday May 21 bars will be allowed to reopen.

Australia

Australia's first case of COVID 19 was registered when a traveller returned from Wuhan, China on January 25, 2020. As of May 10, 2020, there have been 6,939 cases including 97 deaths and 6,141 recovered (98% recovery rate). While not quite as prevalent as New Zealand (39,468), Australia has also done a significant amount of testing (31,575 tests per one million population). Starting from March 20, a travel ban was placed on all non-Australian citizens and non-residents seeking to enter Australia, effectively stopping any international tourism. The following day (March 21, 2020), social distancing rules were enforced, while the different State Governments started to close "non-essential" services. The Federal Government on March 30 announced a range of policies and measures as part of an economic stimulus package. The Federal Government's total support for the economy equates to 16.4% of annual GDP (AU$320 billion). One of those policies was an AU$ 130 billion JobKeeper Payment to help businesses retain their employees. To ensure employers keep their workforce and secure a quicker economic recovery, around six million employees will receive a fortnightly pre-tax payment of $1,500 through their employer.

Naturally, the airlines operating out of Australia have been affected. Qantas have ceased their international operations and domestic flights have been cut by 60%. In terms of planes and people, this means about 150 aircraft will be grounded, and two-thirds of Qantas's 30,000 employees will be stood down. Virgin Australia, Qantas' biggest rival, has gone into voluntary financial administration after requesting an AU$1.4 billion loan from the Australian Government. Tourism Australia, the nation's destination marketing organization, has developed the campaign "With Love from Aus" to continue to engage with potential tourists, showing them Australia's unique wildlife, environment, food and wine, arts and cultural experiences so that they are motivated to visit Australia when travel restrictions are lifted.

Contributed by Larry Dwyer, Stephen Pratt and Mondher Sahli

Research projects to follow

The immediate and expected impact of Covid-19 on hotel activity

Northern Italy has been in lockdown since March the 9th because of the Covid-19 outbreak. The government decree to regulate the emergency allowed hotels to stay open, to host medical personnel and other workers in essential sectors, although the great majority of hotels decided to close down. In these weeks, most hotels have continued managing bookings for future dates and, in such a period of great uncertainty, advance booking management provides relevant information on the expectations of the hotel sector. The CAST - Center for Advanced Studies in Tourism at University of Bologna is monitoring the booking activity of a sample of 331 three-, four- and five-star hotels in Milan and 281 in Venice on a well-known OTA.

The HAI – Hotel Activity Index

As recalled above, many hotels are not active in the current weeks of Covid-19 lockdown.[1] The HAI index measures, at a certain date, the share of hotels accepting reservations for future check-in dates over the total city sample. Different advance bookings are considered: 1 day, 14 days, 28 days, 56 days, 140 days. This index is calculated each Tuesday and is published every Wednesday, starting from April 15th, 2020 on CAST website:

http://www.turismo.unibo.it/it/ricerca/covid-19-impatto-attivita-segmento-alberghiero/index.html

The HAI is calculated on a 3-term exponential moving average. Details of advance bookings (AB) and acronyms of the derived curves are here reported:

Curve acronym	Advance booking considered
AB=1_day	0,1,2
AB=14_days	13,14,15
AB=28_days	27,28
AB=56_days	56
AB=140_days	140

How to read HAI curves

The curve AB=1_day measures the instantaneous impact of Covid-19; the more the curve falls the fewer hotels offer rooms now. The indication is: "hotels accepting reservations today, tomorrow and the day after tomorrow are X% of the total sample". Curves for different advance bookings provide information on future expectations and how they change: if the curve AB=140_days is much higher than the curve AB=56 days the great majority of hotels is confident that activity will resume after two months and before five months. As an example, the index computed on May the 5th, 2020, is reported.
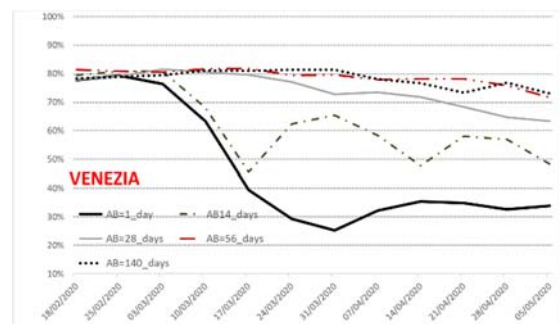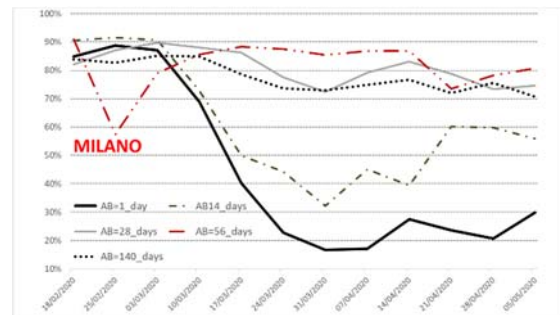
The comparison of HAI, week after week, allows to have a dynamic view on how expectations change in light of the pandemic's evolution and lockdown regulations. The CAST team is also working on the structure of prices posted in Milan and Venice at different advance bookings. Stay tuned on the CAST website for updates on future developments of the index.

Contributed by Andrea Guizzardi, Paolo Figini and Laura Vici.

Covid19Tourism index dashboard available online.

The Covid19Tourism index, available at www.covid19tourism.com

 helps the industry gauge the recovery level compared to the "normal time" without Covid19. A level of 100 indicates the recovery to the normal level. Five sub-indexes include Covid19Tourism Aviation Index, Covid19Tourism Hotel Index,

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[1] Hotels that offer rooms at "abnormal" prices (above € 1000 or below € 20 per person per night) are considered "inactive".

Covid19Tourism Pandemic Index, Covid19Tourism Interest Index, and Covid19Tourism Mobility Index. The first three are included to calculate the overall index.

Contributed by Yang Yang

Inventory of tourism resources of the Municipalities of the Province of Buenos Aires

Publication and implications

Since 2017, a research team at the Faculty of Economics of Universidad Nacional de La Plata had been working on an Inventory of touristic resources for the Province of Buenos Aires in Argentina. We are glad to share with you that it is finally published (and available [here](#)). This tool for public policy planning at the local, provincial, and national levels collects and classifies the tourism resources in each municipality of the mentioned Province. The main classification categories are natural, cultural, historical, sports, and other resources.

The Province of Buenos Aires is not different from many other territories around the world about its tendency to witness a concentration in its tourism demand and supply, both spatially and temporally. In this case, we observe a marked concentration in the destinations located in the Atlantic Coast (Mar del Plata, for instance) that takes place during the summer months.

One public policy implication of the inventory initiative is the potential encouragement of tourism dispersal. The inventory sheds light on the availability of tourism resources in terms of numbers, categories, and relevance in all municipalities. This means an opportunity for policymakers to promote specific resources, make wise investments, build tourism corridors, and collaboratively rethink tourism in the Province with relevant stakeholders. Ultimately, there is a chance not only to attract more tourists and generate more receipts and employment but also to better distribute tourists and tourism

businesses along with the territory. While this can help to mitigate the adverse effects of seasonality in primary destinations, it can also be an opportunity for new destinations to emerge and locally benefit from tourism.

Contributed by Natalia Porto

Economic Analysis of the evolution of Tourist Expenditure in the province of Salta, in seasonal periods during the years 2018-2020

The project, carried out by the National University of Salta and the Catholic University of Salta, seeks to explain the evolution in the monetary expenditure carried out by tourists, in specific goods and not, in the province of Salta in the seasonal of Summer, Easter and Winter of the years 2018, 2019 and 2020.

The tourist survey database will be used on public roads and, in the context of the analysis of the Tourism Economy, using econometric data panel techniques, information will be systematized, followed by the calculation of specific indicators. To then provide a joint estimate, with the 8 waves of microdata available, and thus capture a robust comparison in the evolution of Tourist Expenditure.

Finally, from exogenous variables that approximate macroeconomic, technological, among other conditions- it is intended to delve into the explanations of what happened, and to propose a baseline for understanding the phenomenon and further research.

Contributed by Gastón Carrazán

Call for Papers

Curated Collection: Tourism Demand Forecasting
Annals of Tourism Research

Call for Contributions on Tourism Demand Forecasting: From Crisis to Recovery

The recent epidemic crisis generated by COVID-19 has profoundly impacted the global economy. According to the latest prediction of the International Monetary Fund (IMF) in April, the global economy will contract sharply by 3 percent in 2020, much worse than that in the last financial crisis in 2008-2009. The impact of this pandemic on the tourism industry has been well observed. Most tourist destinations and tourism-related businesses are facing unprecedented challenges in managing the operations during the crisis, and more crucially, planning for the post-crisis recovery. The pandemic is still ongoing, and when the tourist market will recover remains unknown. Scientific forecasting of the full scale of the impact and the recovery of tourism demand are critical for strategic planning of tourist destinations and tourism related businesses.

Given the sudden, one-off and uncertain natures of most crises and disasters including COVID-19, traditional forecasting methods are unlikely to be effective in predicting the recovery of tourism demand from such events. Innovative approaches suitable for forecasting the demand for tourism in such crises are needed urgently. Therefore, the Curated Collection: Tourism Demand Forecasting of *Annals of Tourism Research* is calling for contributions to this line of research. The Curated Collection: Tourism Demand Forecasting serves as a platform for stimulating continuous interests in advancing tourism demand forecasting methodologies and generating important implications for both research and practice. This special focus of the Collection on "Tourism demand forecasting–from crisis to recovery" welcomes contributions on innovative forecasting approaches, such as time-series, econometrics, artificial intelligence, judgemental forecasting, scenario forecasting and combination among them. The study should be relevant to COVID-19 with empirical evidence, but the proposed methodological framework should be applicable to other crises. Any geographical scope (city, region, country, etc.) and sector focus (e.g., hotels, airlines, and attractions) are welcome.

The submission is continuous till 31 December 2020 and should follow the general guidelines of Annals of Tourism Research. When submitting the article, please choose to submit to "CC: Tourism demand forecasting" and acknowledge the response to this call "*Tourism demand forecasting – from crisis to recovery*" on the cover letter.

Should you have any questions about this call, please contact Haiyan Song (haiyan.song@polu.edu.hk) and Gang Li (g.li@surrey.ac.uk).

We look forward to your contribution!

Haiyan Song and Gang Li

Curators for the Curated Collection: Tourism Demand Forecasting - *Annals of Tourism Research*

Special Issue

Sustainability

"Rethinking Novel Tourism Demand Modelling and Forecasting Due to COVID-19: Uncertainty, Structural Breaks and Data"

Due to the SARS-CoV-2 virus and the resulting COVID-19 disease, many will be reading this under some type of self-isolation or mandated confinement or

quarantine, or may have experienced it recently. Times of great uncertainty have a huge impact on every aspect of our lives. After we eventually overcome the health, medical, social, environmental, economic, and financial crisis which is capturing all of our present thoughts and actions, it will be necessary to implement strategies to recover from the catastrophe that this once-in-a-century phenomenon has left on our devastated planet.

Obviously, the limitations of mobility and the application of social distancing measures have had significant impacts on the tourism industry. Unlike the other major industry that contributes substantially to the world GDP (i.e., energy), tourism has been one of the most severely affected industries. The world has never experienced such a long period in which tourism was literally shut down for such an extended period. Consequently, tourism will face many challenges in the coming months and years to recover from the devastation of COVID-19.

In this context, this Special Issue focuses on the challenges faced in providing novel tourism demand modelling and forecasting methods post COVID-19. Any strategies need to be based on the behavior of inbound and outbound tourists. The primary purpose is to shed light on how we can provide insights into many important aspects of tourism demand. This covers a broad scope from theoretical to empirical contributions, as well as other important considerations, such as:

- Behavioral change;
- Uncertainty, risk, risk perception;
- Related health risks;
- Structural breaks;
- Duration of shocks;
- Limited data models and availability of data;
- Early and advanced indicators;
- Hybrid forecasting;
- Forecast based on scenarios;
- Arrivals versus revenues;
- Behavior of specific segments;
- Case studies from different origins and destinations;

- Impact of policy and industry measures;
- Linkages between tourism and economy;
- Income and price elasticities.

As the conventional modelling and forecasting of tourism demand is not likely to hold during and after the coronavirus pandemic, with or without a safe, reliable, efficient, and accessible vaccine, novel modelling and forecasting methods need to be developed. This is the intended purpose of the present Special Issue.

For information:

https://www.mdpi.com/journal/sustainability/special_issues/Novel_Tourism_Demand_Modelling

Dr. Vicente Ramos
Prof. Dr. Chia-Lin Chang
Prof. Dr. Michael McAleer
Guest Editors

Regular Issue

Ayana Journal

Ayana is a free-access publication of the Tourism Research Institute (Economics Faculty, University of La Plata, Argentina)

In Sanskrit, **Ayana** means travel, movement, or displacement; it also refers to a six-month period-the sun's journey from one solstice to another. That trip or movement also means inner change and goal. The term relates to a philosophy stating that the body was given to us so we could break the stillness and move from one place to another, which implies, at the same time, an inner growth.

Ayana is a scientific, electronic, and biannual specialized journal that positions tourism as a complex and multidimensional phenomenon related to the movement of people. In this sense, it seeks to develop a forum for reflection and professionalism based on the exchange of various disciplines related to the field of tourism studies. The foundational purpose of Ayana Revista de Investigación en Turismo is to become a

Latin American and global referent in terms of the spread of international scientific research results and, at the same time, to foster the exchange amongst researchers, professionals, and students of various disciplines that come together in tourism.

Ayana is a free-access publication, distributed in an Open Journal System (OJS) environment for providing a continuous communication of the editorial process.

Call for papers:
- Submission is permanently open. **Deadline for the first submission issue: 15th June**.
- Papers must refer to the tourism field of study: **unpublished research articles, essays, short communications** are accepted in **Spanish, English, and Portuguese**.
- **For the first issue, papers will be sent to ayana@econo.unlp.edu.ar.** From the next number forward, each paper must be uploaded to the Journal's website according to the instructions and requirements established there.

More information about publication rules (English and Spanish version): https://www.econo.unlp.edu.ar/publicaciones/revista-ayana-7245

Anna Clara Rucci on behalf of the Editorial Board

Publications

A Charter for Sustainable Tourism after COVID-19

Abstract
The SARS-CoV-2 virus that causes the COVID-19 disease is highly infectious and contagious. The long-term consequences for individuals are as yet unknown, while the long-term effects on the international community will be dramatic. COVID-19 has changed the world forever in every imaginable respect and has impacted heavily on the international travel, tourism demand, and hospitality industry, which is one of the world's largest employers and is highly sensitive to significant shocks like the COVID-19 pandemic. It is essential to investigate how the industry will recover after COVID-19 and how the industry can be made sustainable in a dramatically changed world. This paper presents a charter for tourism, travel, and hospitality after COVID-19 as a contribution to the industry.

Open access:
https://www.mdpi.com/2071-1050/12/9/3671

By Chang, C.; McAleer, M. & Ramos, V.
Sustainability 2020, 12(9), 3671

A note from the editors

Thanks to all our contributors! We call on all of you to keep sending news, updates, research projects, conference and other calls to include in the IATE newsletter. These can be sent to Serena Volo (Serena.Volo@unibz.it) and/or Mondher Sahli (Mondher.Sahli@vuw.ac.nz).