COVID-19 FOOTPRINT TO TOURISM AND SMALL TOURISM BUSINESSES IN THE FIRST PERIOD OF PANDEMIC

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Abstract

Temporary suspension of travel and hospitality due to Covid-19 pandemic affected tourism sector particularly hard. One of the most affected areas were small tourism businesses, which provide essential part of the tourism services. The main purpose of this paper is to synthesise the major themes related to tourism and small businesses in this sector in the first few months of Covid-19 pandemic. Data were collected in integrative review of secondary sources published in 2020. Eleven key topics have been distilled from the content analysis: freedom of mobility, people's health, economic downturn, small tourism businesses in stress, recommendations for their survival, predictions for tourism recovery, economic measures of EU and the EU Member States to support tourism revival and rethinking the tourism. The results provide a condensed review of the events and actions of relevant institutions triggered by the Covid-19 pandemic and their consequences to tourism and tourism service providers.

Key Words

Covid-19 pandemic; tourism; small businesses in tourism; SMEs; SMTEs.

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INTRODUCTION

The continued rise in the number of middle-class households, the solid growth in global consumer spending (WTTC, 2020a) and popularisation of international travel have been accompanied by the global expansion of tourism in the last decade (Niewiadomski, 2020). The year 2019 was the tenth consecutive year of sustained tourism growth with 1.5 billion of international tourism arrivals (UNWTO, 2020a) and the year when the tourism growth has continued to surpass the global economy growth by around 2.5% (WTTC, 2020a). According to projections of UNWTO (2011), by 2030, the number of international tourists should have surpassed 1.8 billion.

The increase of 4% in international tourism arrivals marks the year 2019 still as the year of the strong growth, nevertheless the 2019 growth was apparently slower compared to the exceptional growth of 7% in 2017 and 6% in 2018. The decrease in 2019 international tourism arrivals has been weighted by uncertainty surrounding Brexit, geopolitical tensions, trade tensions and the global economic slowdown (UNWTO, 2020a). The above-mentioned events indicate how sensitive tourism is to external factors in the global environment. Nevertheless, at the beginning of 2020, United Nations World Tourism Organisation (UNWTO, 2020b) forecasted the continuation of the growth in international tourism arrivals even in 2020: the growth should have been between 3 to 4%; then, the substantial downturn trend was unimaginable.

However, in the first quarter of 2020, governments around the world introduced unprecedented temporary measures to contain the Covid-19 virus. Due to a 'black swan'[1] event they restricted travel, shut-down the non-essential businesses and limited people-to-people interactions. Those measures stopped tourism flows and shut-down the majority of tourism business activities (OECD, 2020).

The more Covid-19 had been spreading around the world, the more visible has become negative effects of its economic and social 'footprint' (Fast Future, 2020). The economic fallout has caused the sharpest drop in economic activity in Europe and globally since the World War II (VOXEU, 2020). The pandemic has triggered a global economic crisis (OECD, 2020), with tourism and small businesses being hit the most (Elms, 2020).

Tourism is a complex system involving many players. The supply side of the sector is highly fragmented and diverse, covering a wide range of activities (OECD, 2020): off-line/on-line information and service providers, travel agents, tour operators, accommodation suppliers, destination managing organisations, visitor attractions, passenger transport activities, etc. Large multinational corporations operate alongside small companies

[1] According to Taleb (2007), a 'black swan' is a highly improbable event, marked by three principal characteristics: firstly, it is unpredictable; secondly, it carries a massive impact and thirdly - after the fact, generally an explanation is invented that makes the event appear less random and more predictable as it was.

(EC, 2020f). In many tourism destinations, small tourism companies are numerically dominant (OECD, 2008).

Small companies or small business entities are generally referred to as SMEs (Small and medium-sized companies), in tourism sector SMTEs (Small and medium sized tourism enterprises) (Beaver, 2005, p.286). SMEs are considered a backbone of Europe's economy, presenting around 99% of all businesses in the EU and two thirds of the total private sector employment (EC, 2020a). Globally, SMEs provide 70% jobs (ITC, 2020). Practitioners refer to them as the 'lifeblood' (Monson, 2020) or the 'heartbeat' (Gold Country Media, 2019) of the communities and economy.

In tourism, SMTEs play an increasing prominent role in several ways: in relation to the supply of tourism services, in job creation, in economic stimulus, in image creation, in balanced development of destinations, etc. (Fu et al., 2019). However, despite the fact that SMTEs form an important part of the tourism system, there has been a rather limited engagement by academics to this research field; consequently, the understanding of such organisations within tourism remains partial (Thomas et al., 2011).

Covid-19 pandemic has affected heavily the international travel, tourism demand and tourism business entities (Chang et al., 2020). Temporary closure of the most of the world's tourism destinations resulted in the closure of the majority of tourism related companies, large or small, dependent directly or indirectly on the tourism sector (e.g. air transport, cruises, hospitality, travel agencies, leisure and cultural activities, etc.) (Romagosa, 2020). Closure of tourism resulted in a sharp decrease of income in business entities in this sector and in implementation of business rationalisation measures in order to prevent permanent closure.

The current pandemic crisis has magnitude, volatility and a wholly different profile with respect to previous earth-shuttering events (UNWTO, 2020a). SARS in 2002-2003, MERS from 2012, the financial crisis of 2008 (Chang et al., 2020), 9/11 terrorist attack in the USA, the tsunami in 2004 in the Indian Ocean region (Higgins-Desboilles, 2020) etc. were not of a global scale (with the exception of global financial crisis 2008). Therefore, they did not cause a widespread shutdown of travel, business and life activities (Higgins-Desboilles, 2020) as Covid-19 pandemic did. However, experiences from the past show high resilience of tourism sector (Hall et al., 2017); therefore, some analysts believe that once the worst moments will have passed, tourism will gradually returned to a certain level of normality.

There is a rapidly growing literature on Covid-19 and its economic impact (Humpries et al., 2020). The attention around Covid-19 pandemic consequences has been emerging also in social, not only in hard science (Wen et al., 2020). Thus, the increased interest is also expected in research of the crisis issues in tourism and SMTEs. However, at present, there is little published research covering both topics.

The study gives answers to two research questions:

- What occurred in tourism and in SMTEs after the Covid-19 pandemic temporary shut-down of the sector and its reopening period?

- How policy makers have been trying to support tourism and SMTEs to their revitalisation?

This paper aims to contribute to a wider knowledge on the state of tourism and SMTEs during the turbulent period of Covid-19 pandemic. It sets the ground for further research in tourism and SMTEs in the pandemic and post-pandemic world.

RESEARCH BACKGROUND

After the turn of the millennium, tourism has continued to be an important economic activity in most countries of the world. In 2019, travel and tourism direct, indirect and included impacts accounted for almost 9 trillion US$ contribution to the world's GDP (10.3%), providing one of ten jobs in the world (330 million jobs) (WTTC, 2020a).

Moreover, tourism has been also recognised as an essential pillar of the 2030 Agenda for Sustainable Development. This sector has the potential to contribute to all of the Agenda's goals (directly or indirectly), particularly to inclusive and sustainable growth, sustainable consumption and production and sustainable use of oceans (UNWTO, n.d.).

Existing studies point out that tourism as a sector/industry has its own specifics or characteristics. They can be synthesised to the following key ones: internationalisation (OECD, 2020; WTTC, 2020a), heterogeneity (Keller, 2012), spill-over effects (WTTC, 2020a; EC, 2020f), service driven sector (Christou, 2005), interdependency of services (OECD, 2020), labour intensity (Zeng et al., 2020) and sensitivity to external events (Hall et al., 2017; Romagosa, 2020; WTTC, 2020b).

Over the years, tourism has developed a dual economy structure (OECD, 2008). In most of the leading tourism origin markets, the tourism industry is composed mainly of large companies that organise tourism to various destinations on an industrial basis. They offer standardised products and develop global strategies that enable them to make the best worldwide use of the local potential. In that case, a network of smaller specialists – SMTEs, which serve only to a small portion of the overall market, mostly support large companies.

In many tourism destinations, however, tourism services are primarily offered by the SMTEs. They amplify the powerful diversity and force for good that travel brings to the world (WTTC, 2020a). The myriad of micro and small tourism companies, deeply rooted in destination, based on local natural and cultural heritage, are often numerically dominant in terms of enterprise number, number of employees and profit (OECD, 2008). They offer high-quality experiences for tourists and bring high value-added to destinations (Romagosa, 2020). While large tourism companies benefit from standardisation and economies of scale, SMTEs can offer their clients more attractive services than larger tourism providers can. They usually address one of the key opportunities of the emerging tourism demand – personalisation of the services (OECD, 2008). SMTEs present one of the most important segments in tourism and travel sector. Statistical evidence suggests that 60-90% of all enterprises in tourism are SMTEs (OECD, 2008).

Studies, related to SMEs and SMTEs, pointed out some major issues about the research in this field.

Firstly, despite the common reference to SMEs and SMTEs in literature, small business entities remain under-theorised and under-researched (Thomas et al., 2011). Existing research tends to describe their characteristics rather to explain how important features of these business entities might be understood. At the turn of the millennium, there were some promising signs that research trends will change, but research remains piecemeal and sporadic (Thomas et al., 2011; Walmsley, 2017).

Secondly, the shortfall in research often results in presumptions being made about small firms in particular setting, which are – when transferred to another settings – not necessarily true (Thomas et al., 2011). Consequently, some conventional wisdom related to small business has been developed, often simply repeated and referred to in academic and professional literature and in documents of policy makers. They can be grouped into the following findings: SMEs and SMTEs tend to be more vulnerable during economic crisis than larger companies are (ITC, 2020), are faced with structural and regulatory challenges and in times of economic crisis particularly suffer from difficulties in accessing funding (European Parliament resolution, 2012), have great mortality rate: only about half of the small businesses last longer than five years (Monson, 2020) etc.

Thirdly, there is no international agreement on size bands of SMEs and SMTEs. Definitions vary significantly between Europe, United States, Australia or Africa; therefore, comparative work remains problematic (Thomas et al., 2011).

Undoubtedly, SMEs play an important role in the state and world economy. They provide around 70% of jobs in countries around the world; by 2030, SMEs are expected to generate 600 million new ones (ITC, 2020). They are crucial to the US economy (Monson, 2020) and as well to the EU. 25 millions of SMEs (EC,2020b) in the EU provide two-thirds of the total private sector employment, whereas more than 30 million people in the EU are self-employed (EC, 2020a).

EU considers SMEs (and entrepreneurship) a key to ensuring economic growth, innovation and job creation (EC, 2020a). Moreover, they play an important role in achieving EU social stability, cohesion and social integration (European Parliament resolution, 2012). Due to their importance, EU institutions provides different tools for promoting SMEs growth and development under the umbrella term 'Small business – big world' (ibid.). The Small Business Act for Europe (2008) provides guiding principles to create an environment for SMEs and entrepreneurship, design rules according to the 'Think Small First' principle, facilitate SMEs' access to finance and develop a supportive legal and business environment.

For SMTEs, a special tourism business portal has been created to update them about continuous transformation of the EU tourism sector and with other tourism relevant novelties. Different programs and schemes under the initiative Destination SMEs (n.d.) should provide SMTEs a favourable environment for growth, for improving their competitiveness and better contribution to the economy of their territory/destination.

METHODOLOGY

Data were collected, processed and presented by a combination of various research methods. The combination corresponds a) to the qualitative nature of the data, b) to a broad scope of the research, its purpose and specific goals and c) to the time-frame.

The research covers two diverse topics: tourism as a sector/industry and small business entities in this sector, both in a specific context of Covid-19 pandemic. Both topics – tourism and SMTEs - are interrelated, but conceptualised differently and mostly studied within different disciplines. Following Snyder (2019), this kind of research requires more creative collection of data than systematic or semi-systematic literature reviews. For collecting the data, therefore, the method of integrative review was applied. This methodological tool has been assessed as the best approach to get relevant data for synthesis of the existing situation, to provide new knowledge about the reviewed topics (Torraco, 2005) and to provide answers to the research questions. The difference of an integrated review compared to systematic and semi-systematic literature review is that the integrative review does not need to cover all articles ever published on the topic, but rather to combine different perspectives (Snyder, 2019).

Data were collected in an extensive desk-top research of secondary sources in July 2020. To get a relevant set of documents for further content analysis, a procedure was designed for collecting and assessing the relevancy of the documents. It included certain steps/phases, standards and guidelines taken from similar studies.

The data collection procedure includes the following steps:

- Determination of the investigation period;
- Search-engine selection;
- Key words determination;
- Selection of relevant documents (first and second refinement).

As research topics were related to the Covid-19 pandemic, January 2020 was determined as the beginning period for document selection. July 31, 2020 was arbitrary set as the last day. The search was limited to documents written in English only. Documents were searched by the following search-engines: Google, Google Scholar and e-Mega search engine of National University Library, which covers major scientific databases for collecting scientific publication.

Due to comprehensive perspective on concepts covered in the study, the search string of key words was rather broad. In the first step, key words for the search string were identified and, in the second step, synonyms for the initial keywords were added. Key words and synonyms in search engines were linked with 'or' operators. The search was based on the combination of the following sets of initial key words and their synonyms: a) coronavirus/Covid-19/pandemic; b) tourism/travel/hospitality; c) small business/small businesses/small and middle-sized enterprises/SME/SMEs/SMTEs. In continuation, the search was repeated adding additional key words in the search string related to the most relevant issuer of potential documents (EU, UNWTO, WHO, WTTC, OECD, ITC). The search was carried out for titles, keywords, abstracts and documents of different types: scientific and professional articles, reports, regulations, guidelines, comments, opinions and discussions of the field-experts and other selected publications.

The following stage was the selection of the relevant documents. The first refinement of the retrieved documents was made after scanning their content by the researchers independently, using a set of inclusive and exclusive criteria (e.g. relevancy of the content, relevant issuer, contribution to the study). Only those documents were selected, for which researcher agreement has been reached. To keep the number of documents reasonable, the second phase of document refinement was conducted. Researchers thoroughly read the selected documents and after reaching the agreement of their relevancy, the final selection was made for further processing.

To perform a qualitative data analysis, the recommendations from Miles et al. (2014) were used on how to condense and display qualitative data. The content analysis comprised a more in-depth approach. Data extraction and data analysis within the context of this research were intertwined. The content of each document was thoroughly studied and analysed. The relevant parts of the text were labelled manually by a set of main codes, which were in the next phase of the text analysis supplemented with a subset of codes. In continuation, the labelled parts of the text were extracted and condensed according to the set and subset of codes.

The combination of condensation, comparison, compilation and description methods were used to present the findings.

RESULTS

Eleven major themes have been be distilled from the reviewed documents:

- Limitation of one of the basic human rights – freedom of mobility;
- Concerns for people’s health vs minimising disruption to travel;
- Economic downturn of tourism;
- SMEs and SMTEs in the focus;
- Recommendations given to small businesses about survival possibilities;
- Predictions regarding tourism recovery;
- Calls of international tourism institutions to governments to support tourism;
- Priorities in time of tourism restart;
- General economic stimuli and support measures of EU and governments to support tourism;

- Special support measures for SMEs and SMTEs;
- Rethinking tourism.

Limitation of one of the basic human rights – freedom of mobility

From a legal point of view, restriction to travel means violation of one of the basic human rights – free movement, and consequently, prevention of the right to participate in tourism and hospitality (Baum & Hai, 2020). Focus on health concerns and negative economic consequences of Covid-19 pandemic, puts aside a legal justification of movement and travel restriction measures.

In our modern world, the tourism experience has been viewed as an entitlement, arguably a right, conceived increasingly as a necessity, rather than a luxury (McCabe and Diekmann, 2015). As in practice, the right to tourism is still somehow privileged and not universal, the right to tourism can be considered more a form of social right rather than a fundamental human right. Yet, regardless of its nature, the right to participate in hospitality and tourism during the Covid-19 pandemic was affected on a scale unprecedented in a peacetime. Its limitation has severely challenged the assumption that we live in a mobile world.

The non-pharmaceutical interventions, e.g. movement restrictions and quarantine, first implemented in China, had been following by similar Covid-19 related restrictions almost in all destinations worldwide (UNWTO, 2020j). In March, EU's external borders have been 'closed' to non-essential travel and all EU Member States have implemented travel restrictions often accompanied by requirements for cross-border travellers to stay in quarantine (EC, 2020f). It seemed that the governments simply used the 'copy-paste' principle, without severe consideration or epidemiologic status in a certain state. A debate about the proportionality of the movement restrictions of people compared to the seriousness of the health danger due to the new virus has not been over yet.

In May 2020, three quarters of the states on the globe still had their borders closed for international tourism (UNWTO, 2020j). The gradual re-opening has occurred in June (OECD, 2020).

While travel and tourism are contributors to disease spreads, a relationship between epidemics/pandemics and travel undoubtedly exists (Gössling et al., 2020). Therefore, dilemmas, how to balance the economic and social life with the spread of the virus and not to limit basic human rights (too much), remain a major concern of international institutions and governments.

Concerns for people's health vs minimising disruption to travel

At the outbreak of Covid-19 in China, UNWTO (2020l) emphasised that the tourism sector 'must put people and their wellbeing first'. Even when the World Health Organisation (WHO) declared the outbreak of Covid-19 to be a public health emergency of international concern, both institutions declared that tourism's response needs to be measured, stay proportionate to the public health threat and based on local risk assessment (UNWTO, 2020n). Neither UNWTO nor WHO proposed stopping the travel.

Later, when faced with the seriousness of the Covid-19 challenge, UNWTO (2020k) changed its initial standpoint and officially put the public health as priority. It launched the campaign #*Travel tomorrow* and called for cooperation with WHO: to respect its health measures in ways that minimize unnecessary impact on international travel (UNWTO, 2020c). Some new terms and slogans encouraged people to minimize the travel, e.g. *'staycation'* instead of vacation (Elliot, 2020) or *'stay home to travel later* (UNWTO, 2020b).

Appeal of UNWTO to travellers/tourists that '*by staying home today, we can travel tomorrow*' expressed the call of UNWTO for shared responsibility to deal with the Covid-19 pandemic and for standing in solidarity with effected countries (UNWTO, 2020m). Yet, UNWTO (2020m) did not stop highlighting that the public health measures needed to be implemented in ways that minimise any unnecessary disruption to travel and trade.

Economic downturn of tourism

In March 2020, tourism activities largely decreased due to international travel bans, widespread restrictions on public gatherings and community mobility. International, regional and local travel restrictions immediately affected national economies, including tourism segments as air transport, cruises, public transport, tourist accommodation, cafes, restaurants, conventions, festivals, meetings, sports events, etc. Given the immediate and immense shock to the sector, pandemic has triggered an unprecedented crisis in the tourism economy (OECD, 2020). Virus has affected all parts of tourism value chain and tourism supply chain (Gössling et al., 2020).

Since the virus outbreak, prospects for 2020 tourism have been downgraded several times. Up to May, the pandemic consequences to tourism were estimated to be three times that of the 2008-2009 Global Economic Crisis (UNWTO, 2020f). Only in May, the international tourist number felt 98% compared to the same month of the previous year. UNWTO reported a 56% year-on-year drop in tourist arrivals in the first five month of 2020. There was a 96% decline in booking to Europe across all subregions over the period of January-May 2020 compared to the same period of the previous year (ETC, 2020). Revised estimates of the COVID-19 impact pointed to 60% or even to 80% decline in international tourism in 2020 (UNWTO, 2020e). Worldwide, a sharp decrease in the number of international tourists could translate into a loss of 850 million to 1.1 billion international tourists, 910 billion to 1.2 trillion US$ in export revenues from tourism and a 100 to 120 million direct tourism jobs at risk (UNWTO, 2020e).

As for destination distribution, in April/May 2020 the biggest decline was seen in Croatia (-86%) and Cyprus (-78%), reflecting the losses of their key resource markets (Italy and the UK). A less pessimistic picture shown for the Western Europe (ETC, 2020). According to industry estimates, revenue losses at the European level have has already exceeded 50% for hotels and restaurants, 85% for tour operators and travel agencies, 85% for long-distance rail and 90% for cruises and airlines (EC, 2020f).

SMEs and SMTEs in focus

The impact of the Covdi-19 related economic crisis has been felt through the entire tourism ecosystem – to tourism subsectors, firms and destinations; however, some parts of the sector have been more affected than others (OECD, 2020). Scholars, practitioners and policy makers agree that small businesses have been affected the most (Elms, 2020; OECD, 2020; Romagosa, 2020), while they are particularly vulnerable to the repercussions of the crisis (ITC, 2020).

As the companies, small in scale – SMTEs - are numerically dominant in the tourism, they have been hit twice by Covid-19 pandemic: as operating in the most affected sector in the Covid-19 crisis and as being small. Moreover, the interdependent nature of tourism services offered by SMTEs causes those entities additional issue – the crisis in one sub-sector (e.g. in aviation) can have follow-up effects on the whole tourism value chain (OECD, 2020).

The period over which SMTEs can survive the shock of temporary closure of the business and loss of almost all income, is likely to be shorter than for large firms[2] (OECD, 2020). The statement is supported by the results of the ITC (2020) study[3] according to which in Covid-19 pandemic business operations of two-thirds of SMEs were strongly affected compared to about 40% of large companies. According to some estimates, over half of them might not survive the following few months.

Derderian (2020) pointed out that the government, public health and economic responses to Covid-19 pandemic are tremendously different if one runs a small business in the USA or in Europe. Moreover, the destiny of SMEs depends also on the industry the SME is in: e.g. online shopping, food delivery, video gaming or video conference industries where the businesses that were booming during the Covid-19 closure time. However, if a SME was running the business in tourist accommodation, restaurant, retail, entertainment or sport, the situation was very different. In those sectors - if they manage to survive - small businesses should be ready to lose 50 to 80% of their turnover and valorisation.

ITC (2020) study (from April) shows that one third of 'smalls' are at risk of shutting down permanently within the following three months. In accommodation and food services, three quarters of surveyed firms said that partial or full lockdown strongly affected their business operations (ITC, 2020). Another survey, conducted in USA on approximately 86,000 people, who own, manage or work in SMEs (from April 2020, exercised by Facebook /2020/ in cooperation with World Bank and OECD), revealed that one third of small businesses had to close the door due to pandemic and were facing uncertain future. Their biggest challenges were the shrinking demand and access to capital. The situation was even worse for those small businesses run by self-employed or for personal income. More than half of them had

[2] The statement that the larger enterprises may have more wriggle room compared with small ones could be challenged by the collapse of the giant Thomas Cook in September 2019 (Romagosa, 2020). However, the Thomas Cook circumstances that caused its bankruptcy cannot be compared to the loss of income due to COVID-19 temporary closure of tourism business.

[3] The survey gethered evidence from 4,467 companies in 132 countries (ITC, 2020).

stopped operating[4]. In personal business sector 52% of them shut down; in hotels, cafes and restaurants 43% (Facebook, 2020). Some small businesses applied for governmental support, although they were less informed about the possibilities what could help their business (Humpries et al., 2020). Yet, the majority of them advocate the standpoint than no amount of stimulus money could replace a functional business. Additionally, owners-managers of those small businesses that managed to continue operating struggled the balance running a business and caring for their households.

Although smaller firms are more likely to adopt agile responses to the crisis than the larger ones, they have – at the same time – tended to adopt retreating strategies more than the bigger ones (ITC, 2020). While big companies can afford to stay put and be resilient, small companies must adapt in an agile manner or collapse.

Recommendations given to small businesses regarding how to survive

In the first days of pandemic, small businesses responded in a similar way: they took steps to protect the employees and customers against infection and communicate with clients about the status of their business (ITC, 2020). In continuation, they followed with a strategy of resilience, scaling down or adjusting the business temporarily.

Several recommendations have been published for small businesses with regard to survival possibilities. The most common advice was related to securing the liquidity for the business and for managing cash according to the “Cash is King” rule (ITC, 2020; Monson, 2020). Predicting how much money they need to ‘stay alive’ during to the coming 18 months, if and how to find a new source of revenue and cost-cutting should be one of crucial steps of survival strategy (Derderian, 2020). Managers should lay-off staff if necessary, revise cancelation policy, apply for government and commercial assistance, etc.

Another important approach to staying in business should be rethinking the existing products or services and their redevelopment to adapt them to the future needs of the market (CBI, 2020; Derderian, 2020). Implementing the technology (if possible) that might help to do the business and talking to the most valued customers to find out what they like might be of help in this process.

Elms (2020) highlights that the problem of decreased demand in tourism should be attacked by creative thinking. Small tourism businesses need to be present online. They might temporary create and sell unique products that reflect their location to remind future tourists about their future travel plans. Furthermore, they could offer virtual walking “tours” to attract more local tourists.

As no crisis is limitless, small businesses can always ‘undertake something’. Owners certainly need to plan what they need to change in their business and what new growth opportunities may exist in the post-pandemic world (Derderian, 2020). New ways of life will definitely produce new needs

[4] Due to a great mortality rate of small business, Marks (2020) wonders how many of them would have closed their 'door' anyway, without Covid-19 crisis.

that might be new opportunities for small businesses. New models and new offers related to dematerialisation need to be invented in the coming period, while the 'new king' of the world will probably be the "Amazon of dematerialisation" (Elms, 2020). The examples of excellent outcomes from previous crisis are some of the most disruptive and interesting companies that have been created after 2001, such as Google, eBay, and after the 2008 crisis, such us Uber, Airbnb, Instagram and WhatsApp after the 2008 crisis (Derderian, 2020).

Predictions for tourism recovery

After the Covid-19 lockdown, several speculations about travel and tourism recovery popped-up. Some early optimistic beliefs that travel will come back quickly (Elliot, 2020) have been soon proved unreal. The prevailing general belief was that tourism would recover as always had after previous crises. The pace of the recovery stayed rather unknown, while the Covid-19 consequences have been much different and transformative as the consequences of the previous crisis have (Hunter, 2020). There were some predictions that the price of cruises and hotel rooms would drop, potentially airfares as well, that tourists might feel safer in hotels than in vacation rentals. It will be interesting to monitor the future to see what is actually going to happen. However, the logical way in tourism recovery should be a strong commitment to sustainability (ibid.).

Some expert surveys suggested that the signs of tourism recovery should be seen within the year 2020, but mostly in 2021 (UNWTO, 2020e), for international tourism in the second half of the 2021 (UNWTO, 2020f). Specific geographic regions – e.g. countries in the European Union – should to rebound first (OECD, 2020). It was expected that European tourism would remain below 2019 levels until 2023. Job losses in European tourism sector in 2020 could range between 14.2 million to 29.5 million (ETC, 2020).

Based on experience from previous crises, it has been predicted that domestic demand should recover faster than international demand and leisure travel quicker than business travel (UNWTO, 2020e). As domestic tourism accounts for 75% of the tourism economy in OECD countries, domestic tourism should be a driving force for tourism recovery, particularly in areas where the sector supports many jobs and businesses. Yet, the countries depending on international tourists will probably recover slowly (e.g. Montenegro with 3.5% of domestic travellers) than those countries where domestic travellers have a significant share in tourism (e.g. Germany with 74% of domestic travellers) (ETC, 2020). However, it is unlikely that domestic tourism could compensate for the decline of international tourism flows (OECD, 2020). Apart from domestic travel, short-hall travel should be the second main market to drive tourism recovery (ETC, 2020). While our daily life is still containing the virus, it cannot yet be clear, when the full return to tourism activities will be possible (OECD, 2020).

The first signs of a gradual upward trend in tourism appeared in the EU, following the opening of borders across the Schengen Zone in June and July. Some destinations started with innovative solutions, e.g. travel 'bubbles' among Baltic countries, air corridor Germany - Spain) and boosted domestic and intra-European travel (ETC, 2020).

Despite the fact that tourism have been returning to some destinations, the confidence index had dropped to record low (UNWTO, 2020f). Safety concerns associated with travel, the resurgence of the virus, risks of new lockdowns and a deteriorating economic environment are those factors weighting on consumer confidence (UNWTO, 2020f).

Calls of international tourism entities to governments for supporting the sector

Due to tourism standstill, millions of livelihoods that depend on tourism income had been put at risk. Therefore, UNWTO recommended the states to restart the tourism as soon as it was safe to do so. It called on governments, international organisations and agencies to include the tourism as a priority in their recovery plans and actions (UNWTO, 2020f); moreover, they should support tourism as a pillar of economic recovery (UNWTO, 2020g).

In the EU, the European Tourism Manifesto (2020) alliance demanded urgent supportive measures in March 2020 to reduce devastating impact of Covid-19 to tourism sector. The members proposed temporary state aid for the tourism and the travel sector from the national governments, fast and easy access to short and medium-long term loans to overcome liquidity shortages, fiscal reliefs, concern for SMTEs, protection of workers from unemployment, etc.

For formulating a sector’s wide and unite response to the challenges of Covid-19 pandemic, UNWTO established the Global Tourism Crisis Committee - GTCC (UNWTO, 2020d). In April, GTCC released a set of global recommendations for government actions to support jobs and economies through tourism. Recommendations have been focused to three key areas: 1) mitigating the impact on employment and liquidity of tourism enterprises; 2) protecting the most vulnerable and 3) preparing for recovery (OECD, 2020). Later, when UNWTO focused on restarting tourism (in May), GTCC issued Global Guidelines to Restart Tourism (UNWTO, 2020d).

Communication of UNWTO (2020h) to governments about priorities for tourism recovery emphasised several areas: providing liquidity for tourism suppliers, protecting jobs, recovering confidence in tourism through safety and security, opening borders with responsibility, harmonisation and coordination of protocols and procedures, enhancing public-private collaboration for an efficient reopening, innovation and sustainability.

Priorities for tourism revival

When tourism had been slowly restarting in an increasing number of countries (from beginning of June), the emphasis of the states was transferred from border lockdown to a need for a tourism reviving in a responsible way. Some international tourism institutions, e.g. UNWTO and WTTC, issued guidelines and recommendations for states and tourism suppliers.

The UNWTO (2020i) guidelines included two major spheres of activities: firstly, safe and seamless border management for air, sea and ground travel; and secondly, safety and hygiene protocols for hospitality, tour operators and agents, meeting and events providers, attraction and thematic parks and destination management. “Safe Travel” protocols of WTTC (2020b) meant to provide consistency to destinations and countries, and additionally - similar to UNWTO - guidance to new approach to health and hygiene in the post Covid-19 world for travel providers, operators and travellers. The protocols cover hygiene regimes and operations, define roles for the staff, determine the physical distance for the travellers, minimise the touch points, determine communication, etc.

EU guidance and recommendations for their Member States were focused on how to: a) safely restore free movement; b) reopen international borders, transport, connectivity and tourism services; c) address the liquidity crunch and d) rebuild customers confidence (EC, 2020f). The document highlighted that until a vaccine or treatment is available, the needs and benefits of travel and tourism must necessarily be weighed against the risk of facilitating the spread of the virus and a resurgence of cases. The latest could require a reintroduction of some confinement measurement.

Additionally, European Commission (EC, 2020d) has launched a special web platform to support a safe relaunch of travelling and tourism across Europe. The platform provides useful real-time information for potential travellers to particular Member states (e.g. on travel restrictions, available means of transport and tourism services, public health measures, e.g. physical distancing or wearing of facemasks, etc). Stimulating tourism demand with new safe and clean labels for the sector, information apps for visitors and domestic tourism promotion campaigns should be some of the crucial areas of the governments worldwide to restore travellers’ confidence (OECD, 2020).

EU has made a major difference in approaches to dealing with the new virus compared to the restrictions implemented in the beginning of the pandemic. Instead of general prohibition, the EU Member States should take targeted measures to control the virus. Moreover, EU should try to ensure that the measures taken by the individual Member States would be compatible, coordinated and mutually accepted to cross the borders and between regions. One of those coordinated actions should be a common list of countries for which travel restrictions can be lifted, agreed by EU Member States. The list should be reviewed on a regular basis, respecting the epidemiological situation and coronavirus response in particular country (EC, 2020e).

General economic stimulus and support measures of EU and governments to help tourism businesses

In early stage of the EU economy and borders lockdown European institutions have already launched a number of measures to support EU economy, e.g. investment packages aimed to support Member State responses to the pandemic, healthcare operators, SMEs and the companies in the most affected sectors - including in hospitality and tourism (COVID-19

Review, 2020). Corona Response Initiative has made €37 billion available for crisis response. "Temporary Framework" (2020a), issued in March, allowed EU Member States to provide five types of aid to support the country's economy, e.g. direct grants, tax advantages, state guaranties for loans taken by companies, subsidized public loans, safeguards for banks that channel state aid to real economy, etc. The following amendments to the main document allowed Member States to give companies additional benefits, e.g. zero-interest rate loans, targeted deferrals of tax or suspension of social security contributions, wage subsidies, support to Covid-19 research, providing subordinary debt, recapitalisation aid to companies in need, support SMEs in financial difficulties, etc. (Temporary Framework, 2020b). Additionally, the Commission adopted an instrument to mitigate unemployment risks (SURE, 2020). The document determines a short-time work scheme designed to reduce the working hours to employees with the purpose of providing them with income support for hours not worked.

Tourism sector has been greatly benefiting from the general economic stimulus and support measures of EU and governments of particular countries. Additionally, many countries have introduced tourism-specific measures to address immediate impact on the sectors and to facilitate the recovery. Fiscal reliefs to tourism business are being supported through exceptional legislation and rule changes (e.g. to offer tourists vouchers instead of cash refunds, to grant tourism vouchers to the citizens to stimulate the tourism demand). It was emphasised that those measures needed to be consistent and complementary to general economic stimulus packages and should include support measures for SMEs (OECD, 2020).

Additional support to SMEs and SMTEs

Governments around the world acknowledged that SMEs act a "lynchpin", connecting pandemic to broader economic recession (ITC, 2020, p. xv). As the widespread collapse of SMEs could have strong impact on national economies, on global growth prospect and on tourism economy (OECD, 2020), SMEs have to be 'on the front line' of the economic ramifications of the pandemic (ITC, 2020). Therefore, countries have been – and still are – rushing to strengthen them. They have been building various financial buffers that could contribute to increased SMEs resilience (ITC, 2020).

As liquidity of SMEs and SMTEs was one of the immediate economic consequence of the Covid-19 pandemic, it was essential to support them with adequate liquidity funds (EC, 2020c). In order to bring immediate cash relief to SMEs, European Investment fund provided around €8 billion of financing to at least 100,000 SMEs. Furthermore, 1 billion € was unlocked under the COSME[5] programme. Financial support through COSME programme includes provision of long-term working capital loans, credit holidays for delayed repayments of existing loans. Additionally, EU countries, national promotional and commercial banks have been putting measures in place for adversely affected SMEs (EC, 2020b).

[5] COSME is abbreviation for Competitiveness of Enterprises and Small and Medium-sized Enterprises.

However, there is a risk that government support, even when available, may be insufficient, late or inadequate to replace lost revenues from collapse in demand (Elms, 2020). Furthermore, protecting small businesses means not only giving money to them, but also blocking anticompetitive mergers and acquisitions when the crisis is over (Lopez, 2020). It might help if the new SMEs strategy fits into the general recovery strategy and considers broader view of small businesses support (EC, 2020a).

Opportunity for rethinking tourism

With COVID-19 pandemic, the unthinkable has happened in tourism: places that have been welcomed tourism phobia in pre-pandemic period (Romagosa, 2020), have moved from over-tourism to 'non-tourism' within a month (Gössling et al., 2020). Some of the most fascinating images of popular tourism sites before and after Covid-19 pandemic in the newspaper articles, TV news, blogs etc. gave a clear picture of how travel restrictions and lockdowns have left tourist-filled hotspots (tourist attractions, towns, beaches) empty (Holthman, 2020).

According to some scholars (e.g. Desmond, 1999; Higgins-Desboilles, 2020), tourism has a power to reshape history, culture, nature and tradition. Therefore, the Covid-19 pandemic may be viewed as a historic transformative moment for tourism.

Higgins-Desboilles (2020) advocates that the pandemic offers a potential to transform tourism sector and the context in which it operates. The states could, for instance, choose to prefer the local business entities to multinationals and promote small to medium tourism enterprises, which should be a substantial part of sustainable tourism. For Romagosa (2020) sustainability is one of the basic steps in making far-reaching structural changes in the sector. COVID-19 challenged us to think about the unsustainability of travel and tourism in the pre-crisis level of and opt for de-growth strategies. The latest should be especially important for oversaturated destinations suffering before pandemic from 'over-tourism', but after pandemic dealing with completely opposite concern - under-tourism (ibid).

As the tourism is returning practically from zero, Brouder (2020) argues that the pandemic situation in tourism could be an excellent opportunity to rethink the new path of the sector. Destination management organisations can start to take regional approach to motivate people to turn their attention to the often downplayed domestic and nearest neighbour markets. Additionally, an unprecedented turbulence in tourism small businesses could happen: many long-standing businesses might disappear and the ones with new focus might emerge. As the current crisis has been accelerating the digital transformation of the tourism sectors, new digital solutions might have been developed by SMTEs, e.g. to create ‘live remote’ tourism, virtual tourism experiences, etc. (OECD, 2020).

Although the possibility of tourism general transformation is low (Brouder, 2020), it has been obvious that during the pandemic time people have to face new ways of ‘being-in-the-world’. Living in the world, where touching things, being with other people and breathing air in the closed space with others can be risky, could change our ‘doing-in-the-world’ (Politico Magazine, 2020). Therefore, the future of a “new normal” (ITC, 2020, p. xi) will be most probably characterised by the following four long-term major trends (ETC, 2020; ITC, 2020):

- An emphasis to resilience to shocks (to be prepared for future threats);
- Embracement of digitalisation opportunities (the virus has shown the power of the technology in the concept of crisis; the tourism sector, traditionally characterised by human interaction, now provides the same valuable intangible aspects through more touchless methods and a more digitalised world);
- Greater inclusiveness (to provide decent jobs and social protection for all) and
- Sustainability.

DISCUSSION

The study highlights major events, measures and consequences of Covid-19 pandemic presented in the literature related to tourism and its most vulnerable part – small businesses in the first few months of the Covid-19 pandemic. The tourism sector has been one of the crucial economic sectors worldwide for years. It provides jobs for millions of tourism suppliers and providing experiences to millions of travellers. With the temporary restriction measures of governments – closing the borders and shutting down the tourism businesses, the sector and the suppliers of its services have been put under tremendous shock. Tourism businesses temporary stayed without customers and revenues; moreover, travel and tourism are still unpredictable activities. Small tourism businesses that play a prominent role in many tourism destinations and form an important part of the tourism system are severely affected. The results of the research present a synthesis of the key themes related to tourism sector and small tourism businesses in the above mentioned context during the certain period of time.

There is no doubt that global travel restrictions and 'stay-at-home' orders of governments have caused the most severe disruptions in our personal lives and global economy since the World War II. Protecting people’s health might have been a reasonable ground for drastic temporary limitation of some basic people rights (free movement, performance of economic activities, etc.) and the right to travel. Alternatively, those measures might be a consequence of incompetency of the governments to face the current health crisis adequately. In the 21th century, it is almost unimaginable that the governments curtail the virus with the same measures that most governments did centuries ago when dealing with similar health crises. Protests in several EU countries and around the world and actions brought to courts against governments indicate that the judgement on eligibility of repressive governmental measures is far from being ended.

The results point out that the temporary shutdown of travel and hospitality and travelling in a 'new normal' later on, have dramatically decreased the tourism flows. UNWTO estimated that in 2020 tourism decline in international tourism might be 60 or even 80% compared to the previous year. The most exposed countries are the ones with higher share of international tourists (e.g. island countries, in EU: Croatia, Cyprus, Spain, Italy, etc.). One billion less tourists could put around 100 million direct tourism jobs worldwide at risk. At the European level, job losses in tourism sector could rich 30 million. Impact of Covid-19 crisis on tourism might be three to five times that of the global financial crisis.

From June 2020 on, countries gradually opened their borders, but the travel has not become seamless yet. Countries have been implementing multiple approaches to adapt 'normal' travel practices to the current circumstances. However, the majority of states has still kept temporary restrictions to travellers from particular countries depending to their epidemiologic situation (e.g. covid-19 test requirement, quarantine). Furthermore, as tourism suppliers operate with limited capacity (e.g. decreased number of flights, closed hotels and other hospitality facilities), it was challenging to connect all interlinked parts of tourism supply chain working together again. Closing the tourism businesses seemed to be much easier than their reopening.

The fact that even several safety and hygiene protocols, implemented by tourism suppliers, cannot increase the consumer confidence in travel behaviour is worrying, but understandable while the virus is still present. As tourism flows are a potential vector for spreading the virus, negative sentiment towards travel may remain until a vaccine is discovered. With virus still circulating, governments have been constantly challenged by balancing measures to limit the virus circulation and coordinating policy action at the local, national and international level. They tended to protect people while minimising job losses and business closures.

During the pandemic, governments have responded quickly to economic crisis and supported the economy and tourism with various financial packages and other economic stimuli. However, due to the interlink of tourism with economic[6] and health crisis, it is expected that tourism recovery to the pre-pandemic situation should be gradual and last at least until 2023 to reach the 2019 level. Domestic tourism and leisure tourism should recover fist, but it is unlikely that they could compensate the loss of the international tourism. As tourism has been known by their resilience, it is likely that many tourism activities will resume. Travel may not be the same, but will not vanish entirely.

The results of the study expose that in highly demand driven tourism sector, significantly decreased demand in travel and hospitality has put at risk the existence of many tourism suppliers, short and long-term. It is widely assumed that impacts of the pandemic were greater to small business than

[6] Nouriel Rubini predicted that from the economic point of view the current crisis would be even greater than was the one in 1929. It will take years from now until the full extent of the crisis becomes visible (Bartz, 2020b). Rubini is one of the best-known economists in the world. He was one of the few who predicted the real-estate bubble in the USA and the resulting financial crisis in 2008. He was also among those who warned early on that Covid-19 would cripple the economy (Bartz, 2020a).

to large companies. According to some expert estimates, one-half of small business in tourism might not survive. Therefore, the decision of national governments to put small businesses as one of the priorities of the economic ramification of the crisis was a wise decision. If not, their widespread collapse could strongly affect the national economies, global economic growth and tourism growth. In EU, for example, some special programmes and parts of the ‘EU temporary framework’ have been particularly focused to provide liquidity and fiscal reliefs to businesses that operate on a smaller scale.

Subsequently to government support, several recommendations have been published to support small businesses survival, e.g. focusing on liquidity, cost cutting, staff lay-offs if necessary, talking to major customers, rethinking the existing products or services, implementing more technology, applying for governmental help, finding new growth opportunities, etc. As Covid-19 may produce new needs, these needs might be opportunities for small tourism businesses.

After being shut down, small tourism businesses have reopened to the world reshaped by the Covid-19. New ecosystem will significantly influence whether they ‘sink or swim’ in the ‘new normal’. Those that will stay in business will have to be part of the sustainable and digitalised tourism future.

It is predicted from the results of this study that the socioeconomic changes in the new normal will probably have a significant impact on tourism that we know. The mobility, socialisation and consumption patterns, leisure and work, and other dimensions of social life may as well change. From this point, the Covid-19 pandemic may be viewed as a historic transformative moment for tourism. Europe used to be the world leading tourist destination in terms of value, quality, sustainability and innovation; the ambition of EU is to stay in this position in the future. At the core of this ambition are sustainability and digitalisation. Within this transition, SMTEs will need particular attention.

Some limitations related to this study need to be mentioned. The first one is subjectivity of the researchers, which commonly accompanies the collection, selection and analysis of the non-numerical data. To minimise this limitation, researchers performed most of the steps of individual methods independently, compared the results and proceeded to the next step after consensus had been reached. The second limitation relates to the limited number of documents available on the research topics and their quality. In academia, some of the resources used in this research might be characterised by the term ‘grey literature’ or papers ‘more driven by the practice than research’. However, the fact is that there have not yet been many studies on the topic. Furthermore, the available documents and studies are related mostly to two geographical areas – USA and EU, while other parts of the world remain uncovered, which is an additional limitation. Another limitation is the obsolescence of some numerical data at the time of (potential) publication of the study. The time difference between collection of data and publication of the results might be of importance in studies that try to give real-time information. The latest should apply also for this study. Yet, due to the time-frame for the revision process in academic studies the limitation cannot be circumvented.

The study is an initial step to the longitudinal research regarding both topics. As the Covid-19 pandemic is going on, it will be urgently needed for academia to monitor further evolvement of the events and consequences of the crisis to the tourism sector and small tourism businesses. Further studies could provide a more critical view on the consequences of the governmental restriction measures to tourism. Furthermore, the efficiency of the state support measures for the revival of tourism businesses would be assessed with better accuracy as at the present. The comparison between predicted downturn on the macro and micro level of tourism might give a more accurate assessments of future scenarios for small tourism businesses survival and tourism flows from international and national perspective. The priority of further studies should be on tourism and tourism small business on the national level.

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