

Common - Tourism:

The COVID-19 pandemic impact on tourism in the EU

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【概要 : Summary】

The COVID-19 pandemic, which has killed nearly 265,000 people and infected more than 3.7 million globally by 7 May 2020, has unprecedented negative impacts on the global travel and tourism industry. Since there do not exist any vaccines nor medicines to treat or prevent the disease, almost all destinations in the world have imposed travel restrictions since January 2020 in order to confine the further spread of the pandemic. Due to the COVID-19 pandemic related lockdown measures, the tourism and transport sector is negatively affected at local, regional, national and global level. The unprecedented international border closures and national lockdown measures and other travel restrictions are creating a huge operational challenge for many countries' entire economies and also for the tourism industry.

It is the first time since World War II that an entire sector is hit equally at global level, including multinational airlines, travel agencies, family-owned hotels or tourist guides. The total or partial suspension of flights and other measures like quarantine or self-isolation, or the suspension of visa issuances and other restrictions have brought tourist activities to a global standstill. The global regions are largely consistent in their response to COVID-19 and between 92% and 100% of destinations have adopted COVID-19-related travel and tourism restrictions since January 2020. Regarding the

further development in the tourism sector, in particular in the summer season, the reopening of tourism destinations will be specifically reliant on any developments in the pandemic. In the EU, the tourism industry has already suffered severe economic damages due to the lockdown. Depending on the state of the COVID-19 pandemic, some destinations are considering to adjust their restrictive measures. With the pandemic slowing down in the EU, the Member States and the European Commission are considering the further way forward, especially regarding the summer vacation season. While the European Commission rolled out recommendations to Member States on how to manage an easing of their lockdown measures while restarting the economy, the restart of tourism will solely rely on the Member States' decisions whether to keep their borders and cultural sites closed or to reopen them.

It needs to be decided, how to achieve a reopening of the tourism market in Europe during the next phase of the COVID-19 pandemic in which the number of cases can be controlled and confined. While inter-continental travel can be excluded in the near future, it will highly depend on the successful confinement of the COVID-19 pandemic in to at least open the EU-internal borders between Member States. This could allow the tourism industry to partially recover from the lockdown. However, while this partial reopening at intra-EU level could be realised on time for the summer vacation season, the international tourism

with non-EU states will need more time to restart.

【記事 : Article】

1. The EU's tourism sector in pre-pandemic times

In the past, the EU was one of the major global tourist destinations, with five of its Member States being among the world's top ten destinations for holidaymakers. According to the World Tourism Organization (UNWTO), the United Nations agency responsible for tourism, global tourism has seen continued expansion over time, despite occasional shocks. Leisure travel is the main purpose of visits in all world regions except the Middle East, where visiting friends and relatives (VFR), or religious purposes predominate. The global share of leisure travel has grown from 50% in 2000 to 56% in 2018. At the same time, air travel increased from 46% in 2000 to 58% in 2018.

Europe accounted for half of the annual international tourist arrivals in 2018, with 51%, and a total of 710 million arrivals. This represents a 5% increase compared to 2017. According to UNWTO, in the list of the top 10 travel destinations, there are four EU Member States, including France, Spain, Italy and Germany. 2018 was the ninth year in a row of sustained tourism growth in Europe.

The Southern and Mediterranean Europe is leading in tourism, with most destinations enjoying continued growth. Italy, Greece, Portugal and Croatia saw robust performance and also Spain showed solid growth in tourism earnings in 2018. The Central and Eastern European destinations grew in line with Europe's average tourism growth. Northern Europe recorded flat growth with mixed performance among destinations.

Tourism is an essential sector in the EU's economy. In 2018, the tourism sector directly contributed 3.9% to the EU's GDP and it also accounted for 5.1% of the EU's total labour force with about 13 million employees related to tourism. In absolute terms, in 2018, Germany had the highest number of employees in the tourism industries with 2.5 million people, followed by the United Kingdom 2.3 million employees,

Italy 1.5 million employees, Spain 1.4 million employees and France 1.1 million employees. These five Member States account for 66% of the employment in the tourism sector across Europe.

According to Eurostat, and based on monthly data provided by EU Member States, over the period 2005–2018, the number of nights spent in tourist accommodation establishments in the EU grew by 40%. Following increases of around 4% in 2015 and in 2016 and 5% in 2017, the number of nights spent in tourist accommodation in the EU continued to grow in 2018, by 2.5%, reaching more than 3.1 billion nights. In 2019 the EU tourist accommodation sector continued its recovery that started in 2010 after the two years of decline in 2008 and 2009.

Important to mention is the distribution of nights spent in tourist accommodations in the EU-28 by origin of the guests. According to Eurostat, in the EU-28, in 2018, the share of resident tourists, travelling in their own country was 53.3%, while non-residents from other EU countries accounted for 34.8%, followed by non-residents from outside the EU (11.9%).

2. COVID-19 pandemic impact on tourism in the EU

Since the outbreak of the COVID-19 in China, resulting in a worldwide pandemic, it has caused nearly 265,000 deaths and infected more than 3.7 million people globally. After COVID-19 was declared a pandemic on 11 March 2020, the scale of disruption to global tourism is shown in a comprehensive new report by the World Tourism Organization (UNWTO). The report entitled "COVID-19 RELATED TRAVEL RESTRICTIONS - A GLOBAL REVIEW FOR TOURISM. First report as of 16 April 2020" is the first analysis of the COVID-19 impact on global tourism. The report shows that between the end of January 2020 and 6 April 2020, 209 destinations worldwide, or 96% of destinations have implemented travel restrictions in response to the COVID-19 outbreak.

According to the UNWTO report, about 43% of destinations (90 destinations) have completely or partially closed their borders. About 21% (44

destinations) have introduced travel bans to passengers coming from certain destinations that have been affected by COVID-19. About 27% (56 destinations) have suspended all or parts of international flights into the destination. Finally, the remaining 9% of destinations with travel restrictions are implementing different measures including to requesting immediate self-isolation or quarantine for usually 14 days after entering a destination, as well as invalidation of visa or no more issuance of visa upon arrival and travel bans to passengers coming from certain regions, among others. The main measures applied and implemented in 93% of European destinations include the complete or partial closure of borders and the complete or partial suspension of flights. In the EU, most EU Member States have temporarily closed not only external borders but also their EU-internal borders. The partial or complete lockdowns to confining the COVID-19 spread include a ban of touristic travels for the time being, but until at least mid May 2020. More than half of the EU's businesses in the tourism sector are located in the Member States Italy, Spain and France, and these are also the European countries hit worst by the COVID-19 pandemic. Consequently they had to insert the strictest travel restrictions due to the pandemic in the EU. In France, while international travel is still heavily restricted, traveling from one part of France to another will be allowed when lockdown ends on 11 May 2020. There are no touristic travels allowed and several major airports like Paris Orly Airport (ORY) are closed. Inter-city plane, train and coach services have been reduced. In Italy, travel is restricted to documented work and health reasons or absolute urgency. A completed self-declaration form must be handed to the airline before departing for Italy. All passengers must report their arrival to the local health authority of their destination address, and are subject to health surveillance and quarantine for 14 days. For those entering for only 3 days up to a maximum of 5 days self-quarantine is not required. Only if exceeding the 5 days quarantine is required.

No touristic travel is allowed yet.

In Spain, the gradually opening and the end of the lockdown restrictions have started. In the best case, the de-escalation phase will take six weeks and the maximum duration of eight weeks for the whole of Spain. The border between Portugal and Spain will remain closed at least until 15 May 2020. Touristic travels are currently not allowed yet.

Despite the swift and comprehensive policy response to the COVID-19 pandemic at both EU and national level, the EU economy will experience a recession of historic proportions in 2020. The EU's real GDP is expected to decrease by -7.1% in 2020, according to the International Monetary Fund's world economic outlook April 2020. This represents a worse decrease than in 2009 with -4.5%. The three most heavily impacted EU Member States will be Italy (-9.1%), Spain (-8.0%) and France (-7.2%).

With the COVID-19 pandemic counter measures to contain the virus, air travel has been locked down and most of the airlines have grounded their almost entire fleets. Some airlines have already ceased operations, such as the low-cost airline Flybe. Other airlines have temporarily cancelled all flights or are looking to get state aid for survival. According to the Airports Council International (ACI), European airports could lose 700 million passengers (-28 %) and EUR 14 billion in revenue in 2020. Some airports, such as Brussels South Charleroi or Paris Orly have been temporarily closed.

Consequently, also in the EU's tourism sector, hotels, restaurants and bars across Europe had to close due to the lockdown measures in the COVID-19 pandemic and they had to lay off thousands of workers permanently or temporarily. Depending on the further development of the COVID-19 pandemic and the continuation of restrictions, the European tourism sector is now already looking at a pandemic-imposed collapse also in the upcoming summer season. Since it is not clear yet if the COVID-19 pandemic-related travel restrictions on intra-EU level will be lifted on time for the summer break, the discussion on what measures to take for saving the tourism industry and

the summer season has only started.

3. The global response: The UNWTO' s work on rescuing global tourism

The World Tourism Organization (UNWTO) hosted a high-level virtual meeting on 19 March 2020, bringing together key UN agencies, the chairs of its Executive Council and Regional Commissions, and private sector leaders. The UNWTO Secretary-General invited all participants to become part of a Global Tourism Crisis Committee, to prepare the launch of a global guide for recovery. The UNWTO estimates that the pandemic could result in global international tourist arrivals declining by between 20–30% in 2020, down from an estimated growth of 3–4% forecast for the tourism industry in early January 2020. The videoconference meeting further called for international cooperation to tackle the economic effect and social cost of the pandemic. According to UNWTO Secretary-General Zurab Pololikashvili, with tourism suspended, the benefits the sector brings to the economies are under threat as well as millions of jobs. Therefore, governments should continuously review travel restrictions and ease or lift them as soon as it is safe to do so.

According to the World Travel & Tourism Council, which represents the Travel & Tourism sector globally, 75 million jobs in the tourism sector are at risks worldwide. The UNWTO has released a set of recommendations calling for urgent and strong support to help the global tourism sector not only to recover from the unprecedented challenge of COVID-19, but also to “grow back better”. The UNWTO recommendations give countries a checklist of possible measures to help the tourism sector to sustain the jobs and support the companies at risk during the COVID-19 crisis. Mitigating the impact on employment and liquidity, protecting the most vulnerable and preparing for recovery, must be the key priorities,” according to the UNWTO Secretary-General Zurab Pololikashvili.

4. Measures to save the EU' s tourism industry

4.1. The European Parliament and Commission' s measures

Tourism was the first sector to be hit by the pandemic and it will probably be the slowest to recover and come out of this phase, according to the European Commissioner for Internal Market Thierry Breton. In the past weeks, European Commission president Ursula von der Leyen sent several contradictory messages regarding the summer vacation season in the times of COVID-19 pandemic. Firstly, von der Leyen advised the EU citizens not make any summer vacation plans, but then she changed her opinion by stating that “smart” summer holidays should be possible. However, she did not define what precisely a “smart holiday” would mean.

The European Parliament debated the COVID-19 outbreak on 10 and 26 March 2020 plenary sessions. Among other issues, they stressed the need for establishing common rules on entering the Schengen area. At its plenary session of 26 March 2020, the European Parliament debated how to speed up the implementation of measures responding to the COVID-19 outbreak. It adopted, almost unanimously, the legislative proposals on the launch of the Coronavirus Response Investment Initiative, the extension of the EU Solidarity Fund to cover public health emergencies; and on the temporary suspension of airport slot rules. Subsequently, these measures were formally adopted and put into force.

Furthermore, in a letter dated 24 March 2020, the Parliament' s Tourism Task Force called on several European Commissioners to consider “a tourism rescue action plan, with concrete short and medium term measures”. In its joint motion for a resolution on EU coordinated action to combat the COVID-19 pandemic and its consequences, debated on 16 April 2020, the European Parliament considered that the transport and tourism sectors have been severely affected under the COVID-19 pandemic and called for action to ensure the health, safety and working conditions of transport workers and for supporting transport companies. In its resolution on EU coordinated action to combat the

COVID-19 pandemic European Parliament and its consequences, the European Parliament suggested that a prevention and management mechanism needs to be developed for the tourism sector at EU level to protect the workers, help the European companies and ensure passenger safety.

On 21 April 2020, the European Parliament's Transport and Tourism Committee urged the Commission to come up with a European action plan to help the tourism sector overcome the COVID-19 crisis. In their debate with Internal Market Commissioner Thierry Breton, MEPs reiterated that the tourism sector needs more support through specific measures in the Covid-19 crisis, like funding, increased EU-level coordination and a targeted roadmap. In particular, considering the summer holiday time, the MEPs highlighted that clarity was needed for travel during the summer months.

The Parliament's Transport and Tourism Committee urges the Commission to come up with a European action plan to help the tourism sector to overcome the crisis. Members of the Tourism Task Force of the Transport and Tourism Committee called on the Commission to present a tourism rescue action plan to ensure timely national and European assistance for the travel and tourism sector, including national compensation schemes and financial aid instruments, and establishes a crisis-management mechanism for the sector. The MEPs also asked for certainty on travel and movement restrictions before the summer holidays and that restrictions could continue in the coming months, including possible bans on visiting beaches because of social distancing rules. The Commissioner explained that sufficient guarantees for safety and security are needed before restrictions are lifted. He added that the work on facilitating travel is ongoing and there will be more clarity ahead of the summer. The European Commission will come up with guidelines on how to restart travel.

On 21 April 2020, the EU's internal market Commissioner Thierry Breton stated that the external borders of the EU's Schengen Area would probably remain shut until the summer due to the COVID-19

pandemic and that the discussion has started on how to open the EU Member States' internal borders. Commissioner Breton underlined that the loss of earnings at European level for hotels and restaurants could reach at least 50% in terms of annual income and it could rise to 70% for tour operations and travel agencies and even more for some cruise and airline companies. Making things worse, some countries that are specifically hit by the coronavirus are also heavily dependent on tourism, like Italy and Spain.

Commissioner Breton stated that since the European tourism market is severely affected by the COVID-19 outbreak, he wants the tourism sector to benefit the most of the COVID-19 recovery funds, e.g. more than 20% without a doubt. However, the funds have still to be set up and even if it is made available any time soon, it is unclear in how far the tourism sector can be covered. Breton wants a special summit to be organised in September or October to deal with the fallout of the pandemic and set out a roadmap for sustainable tourism across Europe. However, decisions for the summer season are need to be taken now and the special summit in autumn will be far too late.

The European Parliament's Members of the Parliament's Transport and Tourism Committee have urged the European Commission to establish European action plan to help the tourism sector to overcome the crisis caused by the Coronavirus Pandemic. However, the European Commission has been decidedly silent about exactly how the EU envisages developing a short and mid-term action plan for the tourism industry. Regarding the further development for the summer vacation and with supposedly decreasing numbers of COVID-19 cases in the EU, the Member States and the European Commission will consider the further way forward for the tourism industry and the summer vacation season. On 15 April 2020, the EU Commission rolled out recommendations to member states on how to manage easing their lockdown measures while restarting the economy. Countries will decide on the measures themselves, but the Commission urged a better coordination to control the spread of the virus.

The EU Commission wants the Member States to better coordinate and warned that a lack of coordination would have negative effects and create “political friction”. The Commission calls for the Member States to notify each other and the Commission about their planned measures for a gradual reopening.

However, the EU Treaties give the EU limited competences with regard to the tourism sector. The Commission can only support, coordinate or supplement Member States’ actions in this area. The Commission has also provided legal analysis and is setting up a network of European tourism and travel industry associations. The Commission has published some proposals as regards specific tourism-related sectors, like the suspension of the airlines’ slot allocation rules at EU airports. The Commission has also given guidelines on EU passenger right and border checks.

On 22 April 2020, the European Commissioner for transport Adina Vălean stated that guidelines would be set out by mid-May regarding an exit strategy to restart cross-border operations including air travel, but stressed that the timing depends on the health situation. Travel restrictions and border controls currently applied should be lifted once the border regions’ epidemiological situation converges sufficiently and social-distancing rules are widely and responsibly applied”. Vălean indicated there would be guidelines on restoring travel and tourism this season, through such measures as social distancing, rules within airports and on board aircraft - covering such aspects as disinfection - and the wearing of protective equipment.

4.2. Considerations to save the summer vacation season

During the COVID-19 pandemic in Europe, the passport-free European Schengen zone fell apart and Member States closed their national borders. However, according to the Commission, the travel restrictions and border controls currently applied should be lifted once the border regions’ epidemiological situation converges sufficiently and social distancing rules are applied.

Several EU Member States are considering different measures to save the summer holiday season, with Greece considering the introduction of “health passports” for tourists willing to travel to Greece. They need to be tested on COVID-19 first in the country where the holiday starts. Furthermore, EU Member States like Austria are considering opening their borders for the summer travel season to certain countries, which have COVID-19 under control. In Belgium, local authorities along the coast are calling on the federal government to implement some guidelines, after one municipality proposed last week regulating access to the beach with special passes. Similarly, the Portuguese Prime Minister Antonio Costa stated that restrictions would be put in place to avoid overcrowded spaces. However, Spain stated the country would not resume tourist activity until “it is extraordinarily safe”. Other EU Member States might consider even stricter ways forward, like Czech Republic, where President Milos Zeman suggested that the country’s borders should remain closed for a year.

4.3. Protecting the EU’s tourism sector

The EU tourism industry is confronted with strong disruptions of international, intra-EU and domestic travel due to a nearly complete lockdown to confine the COVID-19 spread. Other related sectors such as food and beverage services as well as education and cultural activities are also coming under increasing pressure in the COVID-19 pandemic. In order to contain the pandemic, the European tourism “has gone from 100% to zero”. The Commission will continue to monitor the situation and coordinate support measures with Member States, international authorities and key EU professional associations. Tourism in the EU will require an estimated EUR 375 billion to recover from the crisis generated by the COVID-19 pandemic and to restore operations. The European Commission has not presented any short and mid-term action plan for the tourism industry but invited all Schengen Member States and Schengen associated states to prolong the external border closure for nonessential travel into

the EU until 15 May 2020. French president Emmanuel Macron even suggested that the EU external border should remain closed until September 2020 at least. On the other hand, some Member States are ready to relax quarantine measures and hope to open their tourist hotspots at least for the summer vacation season. Greece and other EU Member States including Spain, Portugal, Cyprus and Malta signed a joint statement calling on the EU to come up with a dedicated recovery plan for the tourism industry and a system to manage travel and hospitality. They want the Commission to provide a common set of rules for potential holidaymakers. With some countries relaxing restrictions faster than others, the Commission will want to avoid a chaotic summer vacation where travellers are subject to a myriad of different restrictions in different EU Member States. Common rules and protocols will be necessary for all tourist destinations in the EU, as well as for the modes of transportation, airports, hotels, and restaurants in the EU's tourist destinations. Malta also called on the EU to consider setting up "safe corridors between territories and regions" to allow travellers who have undergone relevant safety checks to cross borders and submit some kind of "health passports" for eligible travel. However, in how far same EU-wide rules for the restart of tourism will be set up before the summer vacation will mainly depend on the further development in the COVID-19 pandemic development.

5. Outlook

The COVID-19 pandemic and the related lockdown in the EU has a detrimental impact on the tourism sector, which came to a full standstill, as all domestic and international travel was restricted. In a first phase of relaxation of lockdown measures in some EU Member States, it means that the 53% of resident tourists of a country could travel to their domestic holiday destinations. However, the countries could miss out partially on the 47% non-resident tourists in 2020. Furthermore, the longer the lockdown will last within the EU, the worse the consequences for the tourism sector will be. Since 74% of the non-residents

tourists (47%) come from other EU Member States in the EU-28, it would be important to open as fast as possible the EU internal borders in order to allow the non-resident EU citizens to travel to another EU Member State for vacation purposes. If the EU's internal borders remain closed, the situation in a EU Member State's tourism destinations cannot properly improve and the tourism sector cannot recover. Therefore, the tourism sector was among the first industries hit by the COVID-19 pandemic crisis, and it will probably be one of the last to recover.

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